

# **GARAGE MANAGEMENT SYSTEM**

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# **INTRODUCTION**

## **Project Overview**

The Garage Management System is a valuable tool for automotive repair facilities, helping them deliver top-notch service, increase operational efficiency, and build lasting customer relationships. With its user-friendly interface and powerful features, GMS empowers garages to thrive in a competitive market while ensuring a seamless and satisfying experience for both customers and staff.

## **Used Technology : Salesforce**

Salesforce is a leading cloud-based Customer Relationship Management (CRM) platform that enables businesses to manage customer data, sales processes, marketing campaigns, and customer service activities. It offers a suite of applications designed to streamline and automate various business functions, enhancing efficiency and customer engagement.

# Creation of custom objects :

## Customer Details Object

The screenshot shows the Salesforce Setup interface for creating a new object named "Customer Details".

**Object Details:**

- Description:** API Name: Customer\_Details\_Object\_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.

**Object Manager Sidebar:**

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules
- Object Access
- Triggers

## Appointment Object

The screenshot shows the Salesforce Setup interface for creating a new object named "Appointment".

**Object Details:**

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

**Object Manager Sidebar:**

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules
- Object Access
- Triggers

## Service Record Object

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. Under 'SETUP > OBJECT MANAGER', the 'Service records' object is selected. 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, Object Access, and Triggers. The main 'Details' tab is selected, displaying the following information:

Setting	Value
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
Help Settings	Standard salesforce.com Help Window

At the bottom right of the main area are 'Edit' and 'Delete' buttons.

## Billing details and feedback Object

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. Under 'SETUP > OBJECT MANAGER', the 'Billing details and feedback' object is selected. 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, Object Access, and Triggers. The main 'Details' tab is selected, displaying the following information:

Setting	Value
Description	
API Name	Billing_details_and_feedback__c
Custom	✓
Singular Label	Billing details and feedback
Plural Label	Billing details and feedbacks
Enable Reports	✓
Track Activities	
Track Field History	✓
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

At the bottom right of the main area are 'Edit' and 'Delete' buttons.

# Creation of tabs for the objects

The screenshot shows the Salesforce Setup interface under the 'User Interface' section, specifically the 'Tabs' page. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar at the top left contains the text 'tabs'. On the left, a sidebar lists 'User Interface' sections: 'Rename Tabs and Labels' (selected) and 'Tabs'. A message at the bottom left says 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Custom Tabs' and contains three sections: 'Custom Object Tabs', 'Web Tabs', and 'Visualforce Tabs'. The 'Custom Object Tabs' section displays a table of tabs defined for various objects:

Action	Label	Tab Style	Description
Edit   Del	Appointments	Form	
Edit   Del	Billing details and feedbacks	Form	
Edit   Del	Brokers	People	
Edit   Del	Customer Details	People	
Edit   Del	Departments	Books	
Edit   Del	employees	People	
Edit   Del	NM student	Airplane	
Edit   Del	Properties	Real Estate Sign	
Edit   Del	Service records	Books	
Edit   Del	Travel Approvals	Airplane	employees details like name dob etc

The 'Web Tabs' and 'Visualforce Tabs' sections both show a message indicating no tabs have been defined.

# Creating a lightning app

The screenshot shows the Lightning App builder interface. The top navigation bar includes 'Lightning App builder', 'App Settings', 'Pages', and 'Garage Management Application'. A sidebar on the left is titled 'App Settings' and contains 'App Details & Branding'. Under 'App Details & Branding', there are sections for 'App Options', 'Utility Items (Desktop Only)', 'Navigation Items', and 'User Profiles'. The main content area is titled 'App Details & Branding' and contains fields for 'App Name' (Garage Management Application), 'Developer Name' (Garage\_Management\_Application), 'Image' (a thumbnail of a garage interior), 'Primary Color Hex Value' (#319B46), and a 'Description' (Used to manage garage operations, including service details, appointments). There is also an 'Org Theme Options' checkbox (checked) and an 'App Launcher Preview' section showing a preview card for the app.

The screenshot shows the 'App Settings' section of the Lightning App Builder. The 'Navigation Items' tab is selected. On the left, there's a sidebar with 'App Details & Branding', 'App Options', and 'Utility Items (Desktop Only)'. The main area has a heading 'Navigation Items' with a sub-instruction: 'Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.' Below this is a 'Available Items' list containing various Salesforce objects like Accounts, Activation Targets, Activations, All Sites, Alternative Payment Methods, Analytics, App Launcher, Appointment Categories, Appointment Invitations, Approval Requests, Approval Submission Details, and Approval Submissions. A search bar at the top of the list says 'Type to filter list...'. To the right is a 'Selected Items' list containing 'Customer Details', 'Appointments', 'Service records', 'Billing details and feedbacks', 'Reports', and 'Dashboards'. There are arrows between the two lists for moving items.

The screenshot shows the 'App Settings' section of the Lightning App Builder. The 'User Profiles' tab is selected. On the left, there's a sidebar with 'App Details & Branding', 'App Options', and 'Utility Items (Desktop Only)'. The main area has a heading 'User Profiles' with a sub-instruction: 'Choose the user profiles that can access this app.' Below this is a 'Available Profiles' list containing 'Analytics Cloud Integration User', 'Analytics Cloud Security User', 'Anypoint Integration', 'Authenticated Website', 'Authenticated Website', 'B2B Reordering Portal Buyer Profile', 'Contract Manager', 'Custom: Marketing Profile', 'Custom: Sales Profile', 'Custom: Support Profile', 'Customer Community Login User', 'Customer Community Plus Login User', and 'Customer Community Plus User'. A search bar at the top of the list says 'Type to filter list...'. To the right is a 'Selected Profiles' list containing 'System Administrator' and 'Manager'. There are arrows between the two lists for moving profiles.

# Configured fields and relationships for objects

The screenshot shows the Salesforce Object Manager interface for the 'Customer Details' object. The left sidebar lists various setup categories like Page Layouts, Lightning Record Pages, and Field Sets. The main content area displays the 'Fields & Relationships' section with the following data:

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

The screenshot shows the Salesforce Object Manager interface for the 'Appointment' object. The left sidebar lists various setup categories. The main content area displays the 'Fields & Relationships' section with the following data:

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)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Maintenance service	Maintenance_service_c	Checkbox		
Owner	OwnerId	Lookup(User,Group)		✓
Repairs	Repairs_c	Checkbox		
Replacement Parts	Replacement_Parts_c	Checkbox		
Service Amount	Service_Amount_c	Currency(18, 0)		
Vehicle number plate	Vehicle_number_plate_c	Text(10) (Unique Case Insensitive)		

Setup > OBJECT MANAGER

### Service records

Fields & Relationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Appointment	Appointment__c	Lookup(Appointment)		✓
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 date	service_date__c	Formula (Date)		
Service records Name	Name	Auto Number		✓
Service Status	Service_Status__c	Picklist		

Setup > OBJECT MANAGER

### Billing details and feedback

Fields & Relationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Billing details and feedback Name	Name	Auto Number		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Payment Paid	Payment_Paid__c	Currency(10, 2)		
Payment Status	Payment_Status__c	Picklist		
Rating for service	Rating_for_service__c	Text(1)		
Service records	Service_records__c	Lookup(Service records)		✓

# Creating validation rule for appointment object

The screenshot shows the Salesforce Setup interface for creating a validation rule. The left sidebar lists various configuration options like Details, Fields & Relationships, Page Layouts, and Triggers. The main area is titled "Error Condition Formula" and contains the following fields:

- Example: `Discount_Percent_c > 0.30` [More Examples...](#)
- If this formula expression is true, display the text defined in the Error Message area.
- Formula input field: `NOT(REGEX( Vehicle_number_plate__c , "[A-Z]{2}[0-9]{2}[A-Z]{2}[0-9]{4}"))`
- Functions dropdown menu:
  - All Function Categories --
  - ABS
  - ACOS
  - ADDMONTHS
  - AND
  - ASCII
  - ASIN
- Check Syntax button
- Help on this function link

The "Error Message" section includes:

- Example: `Discount percent cannot exceed 30%`
- This message will appear when Error Condition formula is true.
- Error Message input field: `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 radio buttons: Top of Page (selected) and Field [Vehicle number plate].

At the bottom are Save, Save & New, and Cancel buttons.

The screenshot shows the "Appointment Validation Rule" detail page. The left sidebar is identical to the previous screenshot. The main area displays the validation rule details:

Validation Rule Detail	
Rule Name	Vehicle
Error Condition Formula	<code>NOT(REGEX( Vehicle_number_plate__c , "[A-Z]{2}[0-9]{2}[A-Z]{2}[0-9]{4}"))</code>
Error Message	Please enter valid number
Description	
Created By	Harkrishnan S. 8/28/2025, 7:59 AM
Modified By	Harkrishnan S. 8/31/2025, 6:29 AM

Buttons at the bottom include Edit and Clone.

# Creating validation rule for billing details and feedback object

The screenshot shows the 'Validation Rule Edit' screen for the 'Billing details and feedback' object. The 'Rule Name' is set to 'rating\_should\_be\_less\_than\_5'. The 'Active' checkbox is checked. The 'Error Condition Formula' field contains the formula 'NOT( REGEX( Rating\_for\_service\_\_c , "[1-5]{1}" ))'. A tooltip for the 'ABS' function is visible, explaining it returns the absolute value of a number. The 'Description' field is empty.

The screenshot shows the 'Validation Rule Detail' screen for the previously created rule. The rule is active and has the ID 'rating\_should\_be\_less\_than\_5'. The error condition formula is 'NOT( REGEX( Rating\_for\_service\_\_c , "[1-5]{1}" ))'. The error message is 'rating should be from 1 to 5'. The description is empty. It was created by Harkishan S. on 8/28/2025, 8:03 AM, and modified by Harkishan S. on 8/29/2025, 8:03 AM.

# Creating matching and duplication rule to an customer details object

The screenshot shows the Salesforce Setup interface. The left sidebar is expanded, showing the 'Data' section with 'Matching Rules' selected. The main content area displays the 'Matching Rules' page for 'Customer Details'. The rule is named 'Matching customer details' and has a unique name of 'Matching\_customer\_details'. The matching criteria is defined as '(Customer Details: Gmail EXACT MatchBlank = FALSE) AND (Customer Details: Phone\_number EXACT MatchBlank = FALSE)'. The status is set to 'Active'. The rule was created by 'Harkishnan S.' on 8/28/2025, 8:13 AM, and modified by the same user on 8/28/2025, 8:14 AM.

The screenshot shows the Salesforce Setup interface. The left sidebar is expanded, showing the 'Data' section with 'Duplicate Rules' selected. The main content area displays the 'Duplicate Rules' page for 'Customer Details'. The rule is named 'Customer Detail duplicate' and has a unique name of 'Customer\_Detail\_duplicate'. The object is 'Customer Details'. The record-level security is set to 'Enforce sharing rules'. The action on create is 'Allow' and the action on edit is also 'Allow'. The matching rule is 'Matching customer details' with the condition 'Use one of these records?' checked. The alert text is 'Active' with a checkmark. The matching criteria is defined as '(Customer Details: Gmail EXACT MatchBlank = FALSE) AND (Customer Details: Phone\_number EXACT MatchBlank = FALSE)'. The rule was created by 'Harkishnan S.' on 8/28/2025, 8:16 AM, and modified by the same user on 8/28/2025, 8:16 AM.

# Creating a new profiles

The screenshot shows the Salesforce Setup interface under the Profiles section. A new profile named 'Manager' is being created. The profile is set to the 'Salesforce' User License and is a 'Custom Profile'. The 'Custom App Settings' section is expanded, showing various standard and custom applications with checkboxes for 'Visible' and 'Default' status. The 'Service Provider Access' and 'Tab Settings' sections are also visible at the bottom.

This screenshot shows the same 'Manager' profile configuration as the previous one, but with more detailed settings. It includes sections for Data Share (Snowflake Connections, Targets, Target Connections), Custom Object Permissions (for various objects like Appointments, Billing details, etc.), Session Settings (Session Times Out After: 8 hours of inactivity), and Password Policies (User passwords expire in: Never expires, etc.). The 'Basic Access' and 'Data Administration' checkboxes are checked for most objects.

Click to go back, hold to see history

Search Setup

SETUP Home Object Manager

Q profiles

Users Profiles

Didn't find what you're looking for? Try using Global Search.

**Profiles**

Profile Edit sales person Help for this Page

Profile Edit

Name: sales person Save Save & New Cancel

User License: Salesforce Platform

Description:

Custom Profile: ✓

**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 checked="" type="radio"/>	Travel App (Travel_App)	<input type="checkbox"/>	<input type="radio"/>
Dreamhouse (Dreamhouse)	<input type="checkbox"/>	<input checked="" 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**

Overwrite users' personal tab customizations

Standard Tab Settings Home Default On Inventory Reservations Tab Hidden

Cloud

SETUP Home Object Manager

Q profiles

Users Profiles

Didn't find what you're looking for? Try using Global Search.

**Profiles**

**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"/>												
Billing details and feedbacks	<input checked="" type="checkbox"/>	<input type="checkbox"/>												
Brokers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>												
Departments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
employees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Expense Items	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Session Settings**

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: -None-

**Password Policies**

User passwords expire in:	90 days
Enforce password history:	3 passwords remembered
Minimum password length:	8
Password complexity requirement:	Must include alpha and numeric characters
Password question requirement:	Cannot contain password
Maximum invalid login attempts:	10
Lockout effective period:	15 minutes
Obfuscate secret answer for password resets:	<input type="checkbox"/>
Require a minimum 1 day password lifetime:	<input type="checkbox"/>
Don't immediately expire links in forgot password emails:	<input type="checkbox"/>

Save Save & New Cancel

# Creating a roles

The screenshot shows the Salesforce Setup Roles page for the 'Manager' role. The left sidebar navigation includes 'Setup', 'Home', 'Object Manager', and a search bar. Under 'Users', 'Roles' is selected. The main content area displays the 'Role Detail' for 'Manager'. It shows the label 'Manager', this role reports to 'CEO', modified by 'Harkishan S' on 8/28/2025 at 9:07 AM, and access levels for Opportunity Access and Case Access. The 'Role Name' is 'Manager' and it is displayed as 'Role Name as displayed on reports'. The 'Sharing Groups' section lists 'Role' and 'Role and Internal Subordinates'. Below this, the 'Users in Manager Role' table shows one user assigned: Niklaus Mikaelson (Full Name: Niklaus Mikaelson, Alias: nmika, Username: nklaus@niklaus123@gmail.com, Active status checked). A note states that users in this role can edit all opportunities associated with accounts they own, regardless of who owns the opportunities.

The screenshot shows the Salesforce Setup Roles page for the 'sales person' role. The left sidebar navigation includes 'Setup', 'Home', 'Object Manager', and a search bar. Under 'Users', 'Roles' is selected. The main content area displays the 'Role Detail' for 'sales person'. It shows the label 'sales person', this role reports to 'Manager', modified by 'Harkishan S' on 8/28/2025 at 9:13 AM, and access levels for Opportunity Access and Case Access. The 'Role Name' is 'sales\_person' and it is displayed as 'Role Name as displayed on reports'. The 'Sharing Groups' section lists 'Role' and 'Role and Internal Subordinates'. Below this, the 'Users in sales person Role' table shows three users assigned: deva.s (Full Name: deva.s, Alias: ds, Username: deva@gmail.com, Active status checked), Andrew Garfield (Full Name: Andrew Garfield, Alias: agarf, Username: andrew@garfield@gmail.com, Active status checked), and Tom Holland (Full Name: Tom Holland, Alias: tholl, Username: tom@holland@gmail.com, Active status checked). A note states that users in this role can edit all opportunities associated with accounts they own, regardless of who owns the opportunities.

# Create ther new users

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

- Left Navigation:** Shows the "Users" section under "User Management Settings". Other sections like "Feature Settings", "Data.com", "Service", "Embedded Service", "User Interface", and "Console Settings" are also visible.
- User Detail:** For user **Niklaus Mikaelson**.
 

	Name	Role	
Name	Niklaus Mikaelson	Manager	
Alias	nmika	User License	Salesforce
Email	hannava27@gmail.com [Verify]	Profile	Manager
Username	niklaus@niklaus123@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	nkm	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (United States)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	<input type="checkbox"/> View
Delegated Approver		Data.com User Type	<input type="checkbox"/>
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> <input checked="" type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/> <input checked="" type="checkbox"/>
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/> <input checked="" type="checkbox"/>
App Registration: One-Time Password Authenticator		Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/> <input type="checkbox"/>
App Registration: Salesforce Authenticator		Salesforce CRM Content User	<input checked="" type="checkbox"/>
Security Key (UI2F or WebAuthn)		Receive Salesforce CRM Content Email Alerts	<input checked="" type="checkbox"/>
Lightning Login		Receive Salesforce CRM Content Alerts as Daily Digest	<input checked="" type="checkbox"/>

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

- Left Navigation:** Shows the "Users" section under "User Management Settings". Other sections like "Feature Settings", "Data.com", "Service", "Embedded Service", "User Interface", and "Console Settings" are also visible.
- User Detail:** For user **Andrew Garfield**.
 

	Name	Role	
Name	Andrew Garfield	sales_person	
Alias	agarf	User License	Salesforce Platform
Email	hannava27@gmail.com [Verify]	Profile	sales_person
Username	andrew@garfield@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	Andrew	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (United States)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	<input type="checkbox"/> View
Delegated Approver		Data.com User Type	<input type="checkbox"/>
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> <input checked="" type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/> <input checked="" type="checkbox"/>
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/> <input checked="" type="checkbox"/>
App Registration: One-Time Password Authenticator		Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/> <input type="checkbox"/>
App Registration: Salesforce Authenticator		Salesforce CRM Content User	<input checked="" type="checkbox"/>
Security Key (UI2F or WebAuthn)		Receive Salesforce CRM Content Email Alerts	<input checked="" type="checkbox"/>
Lightning Login		Receive Salesforce CRM Content Alerts as Daily Digest	<input checked="" type="checkbox"/>

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. The main content area displays the 'User Detail' page for a user named 'Tom Holland'. The 'User Detail' section includes fields for Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, Delegated Approver, Manager, and various checkboxes for permissions like Role, User License, Profile, Active, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Mobile Push Registrations, Data.com User Type, Accessibility Mode (Classic Only), Debug Mode, High-Contrast Palette on Charts, Load Lightning Pages While Scrolling, Salesforce CRM Content User, Receive Salesforce CRM Content Email Alerts, and Receive Salesforce CRM Content Alerts as Daily Digest.

This screenshot is identical to the one above, showing the 'User Detail' page for a user named 'deva s'. The layout and data in the 'User Detail' section are the same, including the list of permissions and checkboxes for various user roles and features.

# Create a new public groups

The screenshot shows the Salesforce Setup interface. In the left sidebar, under 'Users', 'Public Groups' is selected. The main area displays the 'Public Groups' page with a sub-header 'Group Membership' and 'Group: sales team'. The 'Edit Public Group' form is open, showing the following details:

- Group Information:**
  - Label: sales team
  - Group Name: sales\_team
  - Grant Access Using Hierarchies: checked
  - Description: (empty)
- Members:** A grid showing 'Available Members' (None) and 'Selected Members' (Role: sales person). An 'Add' button is between the two columns.

At the bottom right of the form are 'Save' and 'Cancel' buttons. The top right of the page has a 'Help for this Page' link. The top navigation bar includes 'Search Setup', a magnifying glass icon, and various global search and settings icons.

# Creating a sharing settings

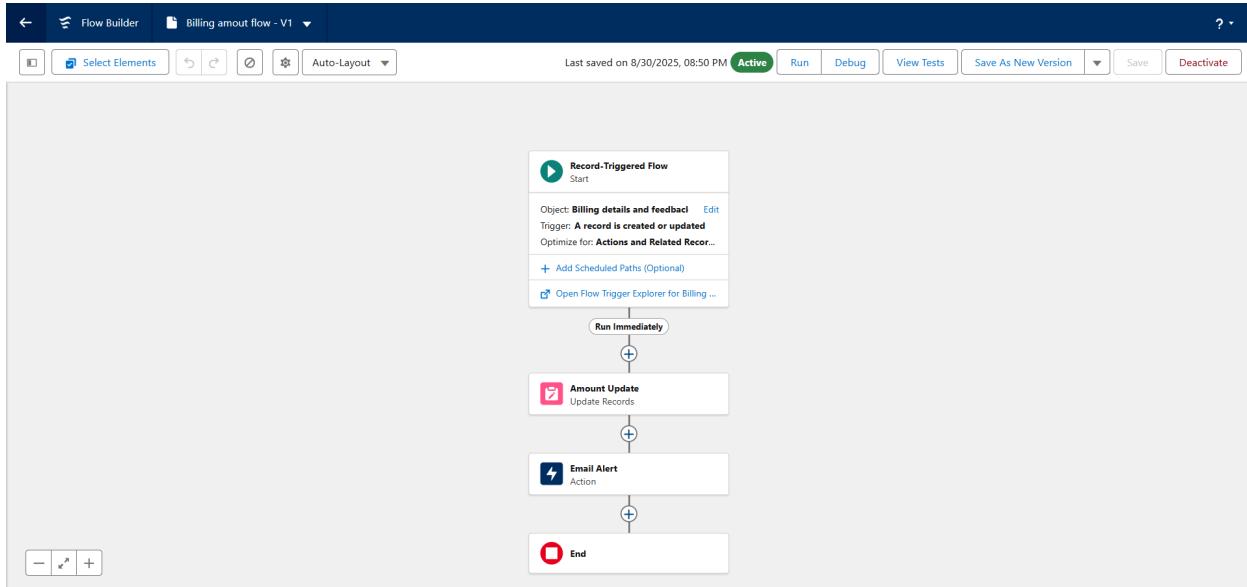
The screenshot shows the Salesforce Setup interface. In the left sidebar, under 'Security', 'Sharing Settings' is selected. The main area displays the 'Sharing Settings' page with a sub-header 'Sharing Settings'. The page lists various objects and their sharing settings:

Object	Sharing Type	Setting	Setting	Setting	Setting
User Presence	Public Read Only	Private	Private	Private	Private
Waitlist	Private	Private	Private	Private	Private
Web Cart Document	Private	Private	Private	Private	Private
Work Order	Private	Private	Private	Private	Private
Work Plan	Private	Private	Private	Private	Private
Work Plan Template	Private	Private	Private	Private	Private
Work Step Template	Private	Private	Private	Private	Private
Work Type	Private	Private	Private	Private	Private
Work Type Group	Public Read/Write	Private	Private	Private	Private
Appointment	Public Read/Write	Private	Private	Private	Private
Billing details and feedback	Public Read/Write	Private	Private	Private	Private
Broker_c	Public Read/Write	Private	Private	Private	Private
Customer Details	Public Read/Write	Private	Private	Private	Private
Department	Public Read/Write	Private	Private	Private	Private
employee details	Public Read/Write	Private	Private	Private	Private
NM student	Public Read/Write	Private	Private	Private	Private
Position	Public Read/Write	Private	Private	Private	Private
Property_c	Public Read/Write	Private	Private	Private	Private
Review	Public Read/Write	Private	Private	Private	Private
Service records	Private	Private	Private	Private	Private
Travel Approval	Public Read/Write	Private	Private	Private	Private

Below the table, there are sections for 'Other Settings' and checkboxes for 'Standard Report Visibility', 'Manual User Record Sharing', 'Manager Groups', 'Secure guest user record access', and 'Require permission to view record names in lookup fields'. At the bottom are 'Save' and 'Cancel' buttons.

The screenshot shows the Salesforce Setup Roles page. The role is named "sales person". It reports to "Manager". 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 lists three users: deva.s, Andrew Garfield, and Tom Holland, all marked as active.

## Creating a flows



**Flow Builder** Billing amount flow - V1

saved on 8/30/2025, 08:50 PM Active Run Debug View Tests Save As New Version Save Deactivate

**Configure Start**

**Select Object**  
Object: Billing details and feedback Trigger: A record is created or updated Optimize for: Actions and Related Recor... + Add Scheduled Paths (Optional) Open Flow Trigger Explorer for Billing ...

**Configure Trigger**  
Trigger the Flow When:  
 A record is created  
 A record is updated  
 A record is created or updated  
 A record is deleted

**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?

https://orgfarm-72ac5be026-dev-ed.develop.lightning.force.com/lightning/setup/Flows/home

**Flow Builder** Billing amount flow - V1

Last saved on 8/30/2025, 08:50 PM Active Run Debug View Tests Save As New Version Save Deactivate

**Update Records**

**Label**: Amount Update **API Name**: Amount\_Update

**Description**

**How to Find Records to Update and Set Their Values**  
 Use the billing details and feedback record that triggered the flow  
 Update records related to the billing details and feedback record that triggered the flow  
 Use the IDs and all field values from a record or record collection  
 Specify conditions to identify records, and set fields individually

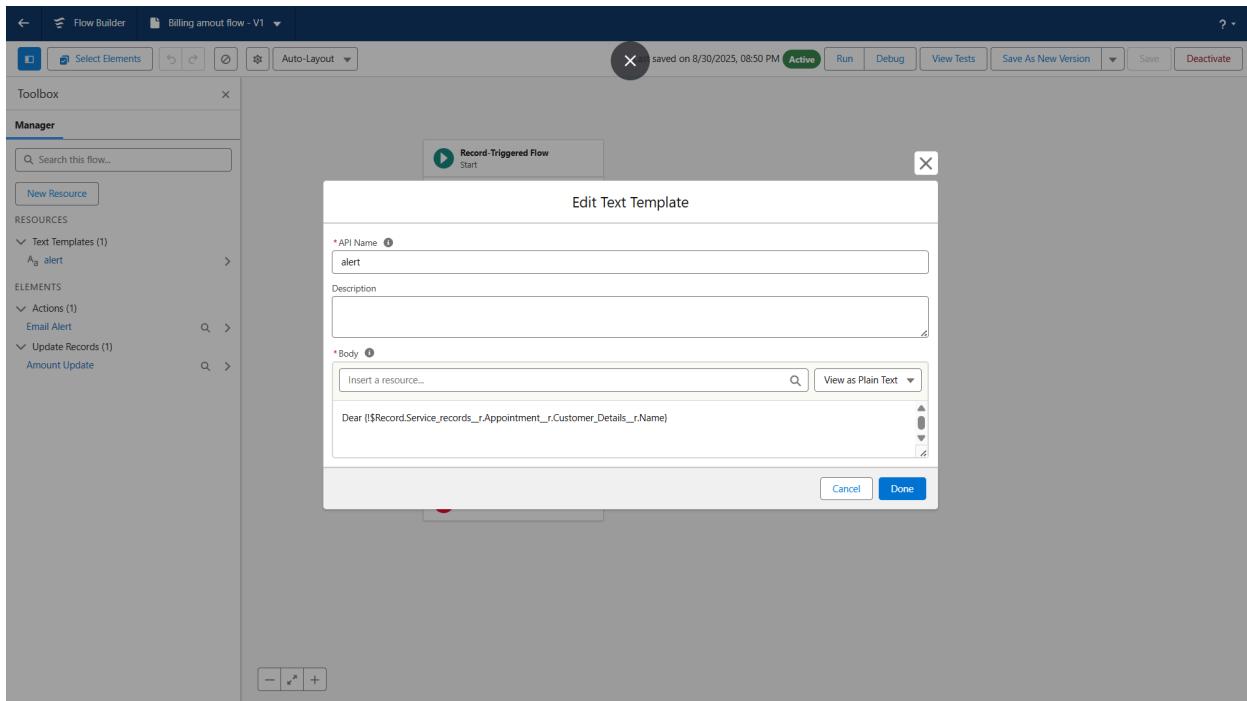
**Set Filter Conditions**  
Condition Requirements to Update Record: All Conditions Are Met (AND)

Field: Payment Status	Operator: Equals	Value: Completed
+ Add Condition		

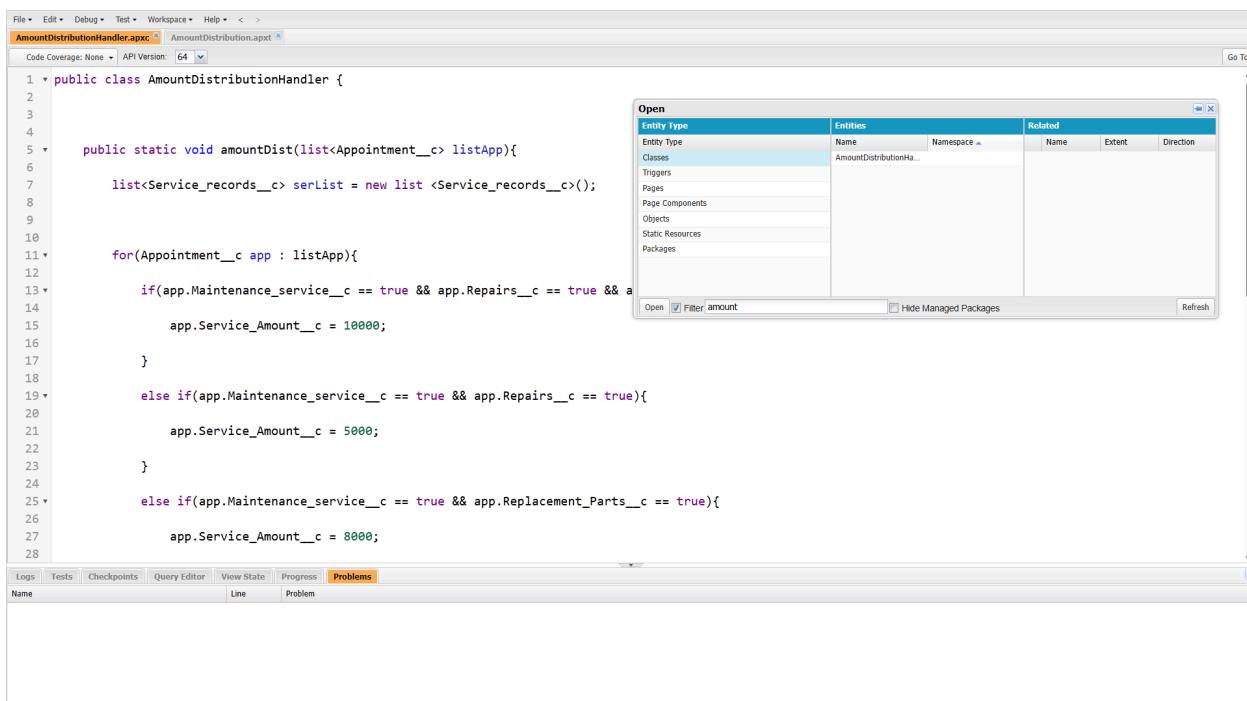
**Set Field Values for the Billing details and feedback Record**

Field: Payment Paid	Value: ...service records > Appointment > Service Amount
+ Add Field	

[-] [x] [+]



## Creating apex handler



The screenshot shows the Salesforce IDE interface. The top window displays the code for `AmountDistributionHandler.apxc`, specifically the trigger logic for `Appointment__c`. The code checks if the trigger is before insert or update and calls the `amountDist` method from the `AmountDistributionHandler` class.

A modal dialog titled "Open" is overlaid on the code editor, showing the "Entities" tab selected. It lists the entity `AmountDistribution` under the namespace `AmountDistribution`. The "Related" tab shows relationships to `Appointment__c` (SObject) and `AmountDist__c` (ApexClass).

Below the code editor, the "Problems" tab is active in the navigation bar. The problems list is currently empty.

## Source code:

### Create a class “AmountDistributionHandler”

```
public class AmountDistributionHandler {

    public static void amountDist(list<Appointment__c> listApp){
        list<Service_records__c> serList = new list <Service_records__c>();

        for(Appointment__c app : listApp){
            if(app.Maintenance_service__c == true && app.Repairs__c == true &&
app.Replacement_Parts__c == true){
                app.Service_Amount__c = 10000;
            }
            else if(app.Maintenance_service__c == true && app.Repairs__c == true){
                app.Service_Amount__c = 5000;
            }
            else if(app.Maintenance_service__c == true && app.Replacement_Parts__c == true){
                app.Service_Amount__c = 15000;
            }
        }
    }
}
```

```

        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;
    }
}

}
}
}

```

## Create a trigger :

```

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

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

    }
}

```

# Create a report folder

The screenshot shows the 'Garage Management' software interface. In the top navigation bar, there are tabs for 'Customer Details', 'Appointments', 'Service records', 'Billing details and feedbacks', 'Reports', 'Dashboards', and 'Billing amount flow'. Below the navigation bar, a sidebar on the left lists categories: 'REPORTS' (Recent, Created by Me, Private Reports, Public Reports, All Reports), 'FOLDERS' (All Folders, Shared with Me), and 'FAVORITES' (All Favorites). The 'Created by Me' section is currently selected. A main table displays a single item: 'Garage Management Folder' created by 'Hankrishnan S' on '9/1/2025, 6:05 AM'. To the right of the table, a modal dialog box titled 'Rename Folder' is open. It contains two input fields: 'Folder Label' with the value 'Garage Management Folder' and 'Folder Unique Name' with the value 'GarageManagementFolder'. At the bottom of the dialog are 'Cancel' and 'Save' buttons.

# Sharing a report folder

The screenshot shows the 'Garage Management' software interface. The 'Reports' tab is active in the top navigation bar. The sidebar on the left shows the 'Created by Me' section selected. A table lists one item: 'Garage Management Folder' created by 'Hankrishnan S' on '9/1/2025, 6:05 AM'. A modal dialog box titled 'Share folder' is open over the table. The dialog has a note: 'These sharing settings apply to all subfolders in this folder.' It has a 'Share With' dropdown set to 'Users'. Below it is a 'Names' section with a search bar and a 'View' button. A 'Share' button is present. Under 'Who Can Access', there are two entries: 'Hankrishnan S' with 'Manage' access and 'Manager Roles' with 'View' access. At the bottom of the dialog is a 'Done' button.

# Create a report type

**SEARCH** Search Setup

**SETUP** Custom Report Types

**1 Define the Custom Report Type**

**Report Type Focus**

**Primary Object** Customer Details

**Details**

- \* Display Label Service information
- \* API Name Service\_information
- \* Description Service information
- Note: Description will be visible to users who create reports.
- \* Store in Category Other Reports

**Set Availability**

An in-development report type is visible only to users with the Manage Custom Report Types permission. A deployed report type is available to all users.

Status

- In Development
- Deployed

**Cancel** **Save**

**SEARCH** Search Setup

**SETUP** Custom Report Types

**2 Define Report Records Set**

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.

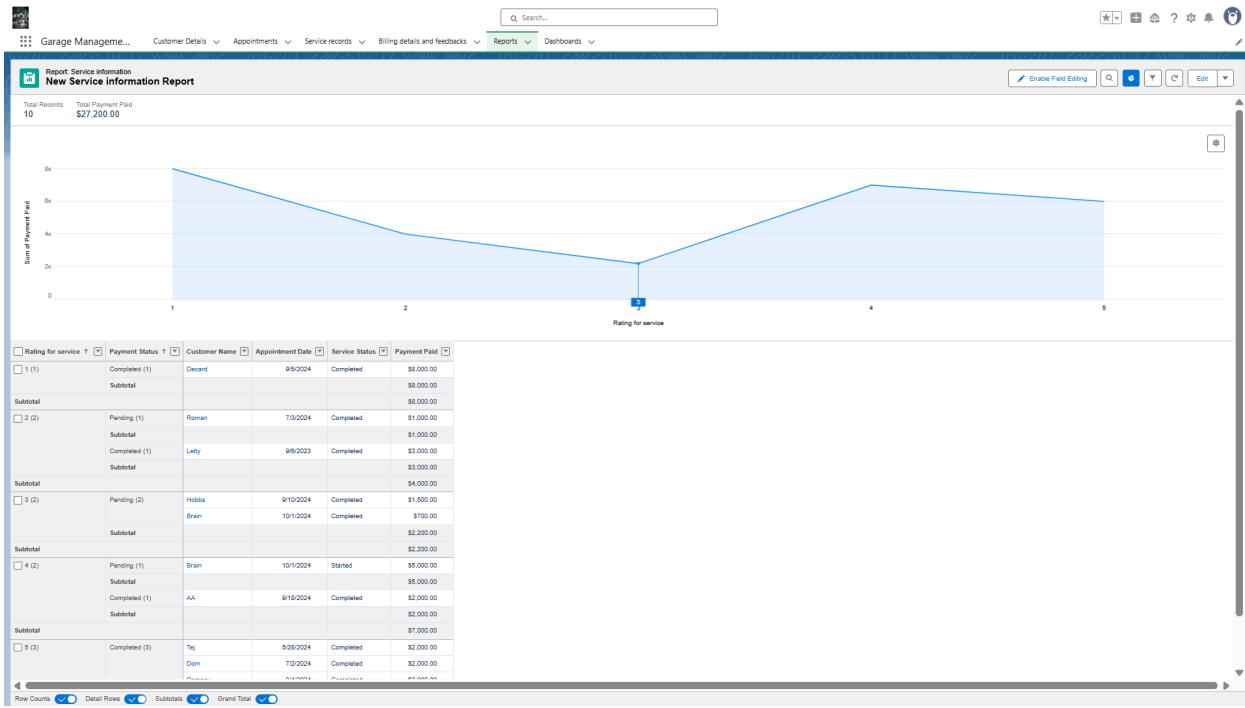
**D Billing details and feedbacks** C to D Relationship:

- Each "C" record must have at least one related "D" record.
- "C" records may or may not have related "D" records.

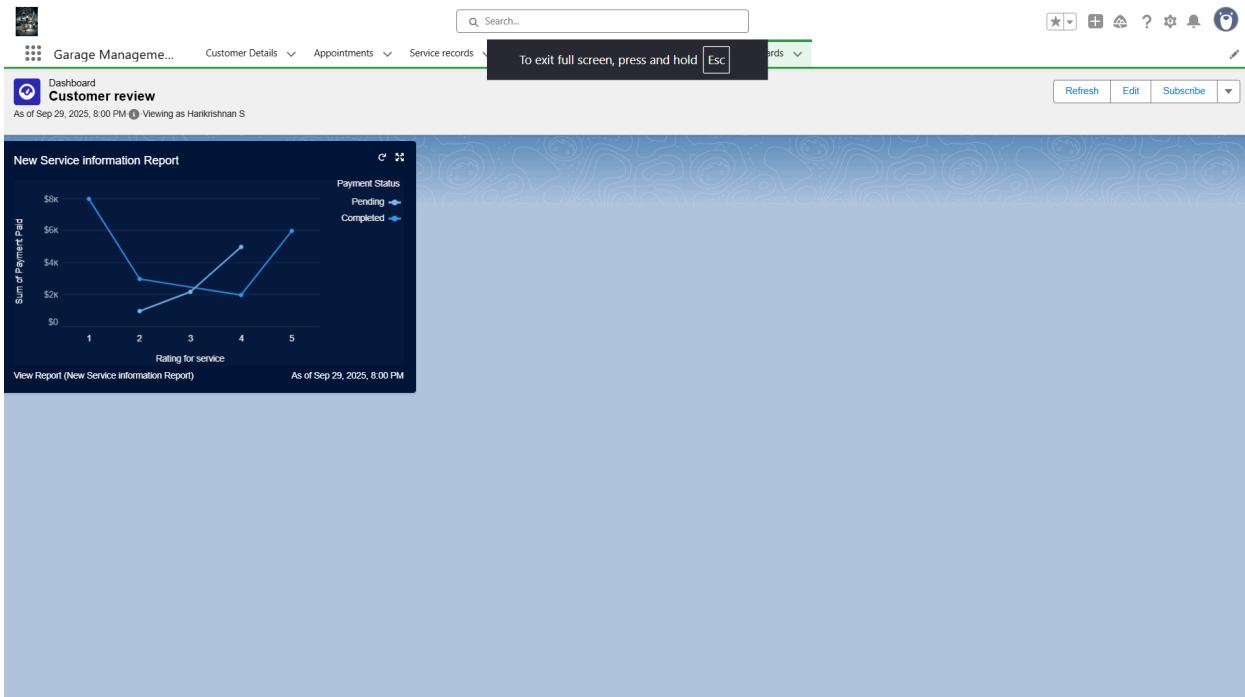
**VENN DIAGRAM** A Venn diagram with four overlapping circles labeled A, B, C, and D. Arrows point from the text descriptions above to the corresponding circles.

**Cancel** **Save**

# Create a report



# Create a dashboard folder



The screenshot shows a dashboard titled "Customer review" with a line graph titled "New Service information Report". The graph plots "Service cost" against "Rating for service", showing a general downward trend from rating 1 to 4, followed by a sharp increase at rating 5. Below the graph, there are links to "View Report (New Service information Report)" and "As of Sep 29, 2025".

A modal window titled "Edit Subscription" is overlaid on the dashboard. It contains settings for scheduling dashboard refreshes:

- Frequency:** Weekly (selected)
- Days:** Mon (selected)
- Time:** 8:00 PM

Under the "Recipients" section, it notes that recipients see the same report data as the person running the report. There is a checked checkbox for "Receive new results by email when dashboard is refreshed." and a link to "Edit Recipients".

At the bottom of the modal are "Unsubscribe", "Cancel", and "Save" buttons.

## Creating a records

The screenshot shows the "Customer Details" page for a contact named "Mac". The "Details" tab is selected. The page displays the following information:

- Customer Name:** Mac
- Phone number:** (567) 876-5567
- Gmail:** mac@mail.com
- Created By:** Harikrishnan S, 9/1/2025, 7:39 AM
- Owner:** Harikrishnan S
- Last Modified By:** Harikrishnan S, 9/1/2025, 7:39 AM

At the top right, there is a message: "To exit full screen, press and hold Esc". At the bottom right, there are buttons for "New Contact", "Edit", and "New Opportunity".

Garage Management System

Customer Details Appointments Service records Billing details and feedbacks Reports Dashboards

Appointment 019

New Contact Edit New Opportunity

Related Details

Appointment Name	019	Owner	Harikrishnan S
Customer Details	Mac		
Appointment Date	11/13/2024		
Maintenance service	<input checked="" type="checkbox"/>		
Repairs	<input checked="" type="checkbox"/>		
Replacement Parts	<input type="checkbox"/>		
Service Amount	\$5,000		
Vehicle number plate	TS30EU0443		
Created By	Harikrishnan S, 9/1/2025, 7:40 AM	Last Modified By	Harikrishnan S, 9/1/2025, 7:40 AM

Garage Management System

Customer Details Appointments Service records Billing details and feedbacks Reports Dashboards

Service records 019

New Contact Edit New Opportunity

Related Details

Service records Name	019	Owner	Harikrishnan S
Appointment	019		
Quality Check Status	<input checked="" type="checkbox"/>		
Service Status	Completed		
service date	9/1/2025		
Created By	Harikrishnan S, 9/1/2025, 7:41 AM	Last Modified By	Harikrishnan S, 9/1/2025, 7:42 AM

# Testing and validation

## Unit Testing

- ❖ Comprehensive testing of individual components, including Apex classes and triggers, to ensure code accuracy and functionality.
- ❖ Each module will be tested in isolation to detect and fix issues at an early stage.

## User Interface Testing

- ❖ Ensure the user interface is user-friendly, responsive, and works on different devices (desktop, tablet, mobile).
- ❖ Validate the functionality of buttons, links, forms, and navigation.

## Key Scenarios Addressed by Salesforce in the Implementation Project

This section outlines the key scenarios that Salesforce addresses in the implementation of the Garage Management System:

- ❖ **Service Appointment Booking:** Customers can book appointments via a self-service portal.
- ❖ **Customer Communication:** Automated notifications and reminders are sent to customers.
- ❖ **Job Tracking:** Service advisors and technicians can track the status of jobs and update customers in real time.
- ❖ **Billing and Payments:** Generate invoices and process payments through an integrated payment gateway.

- ❖ **Customer Feedback Collection:** Customers provide feedback after service completion, which is used to improve service quality.

## Conclusion

The Garage Management System built on Salesforce provides a comprehensive platform for managing appointments, services, and billing. Through the use of custom objects, tabs, profiles, flows, validation rules, and Apex triggers, the system ensures smooth operations, efficient record management, and enhanced customer satisfaction. This project enables better tracking of garage operations, fosters data-driven decision-making, and supports the long-term growth of garage businesses.

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