

PROJECT TITLE:

**GARAGE MANAGEMENT SYSTEM**

**College Name:** JAYARAM COLLEGE OF  
ENGINEERING AND  
TECHNOLOGY

**College Code:** 8114

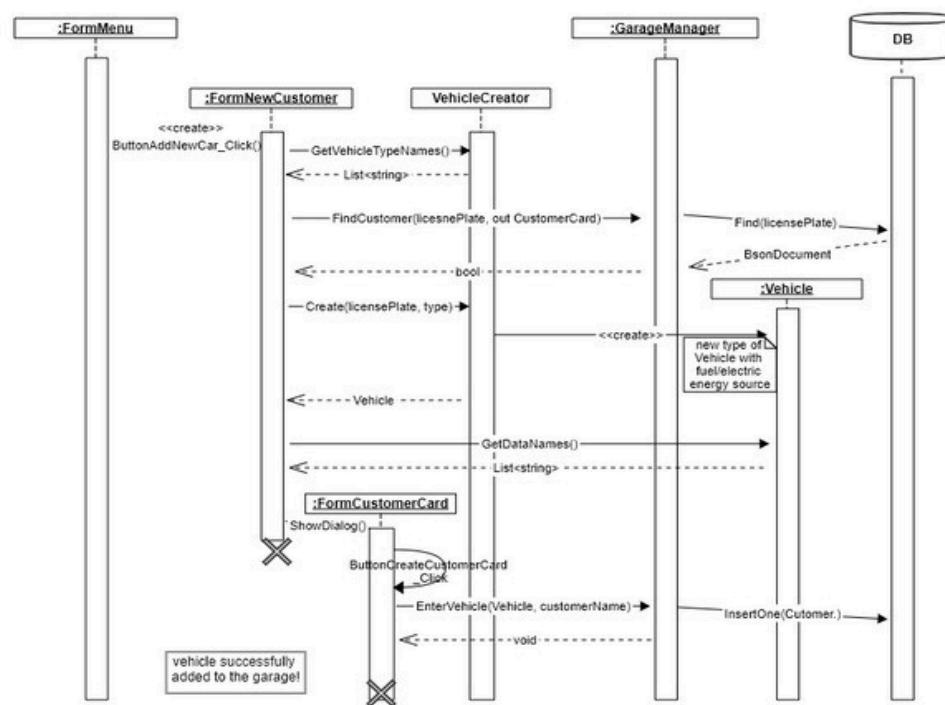
**Team LeaderName:** R.Lalan arockiyaraj

**Email:**lalanarockiya2005@gmail.com

# 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**

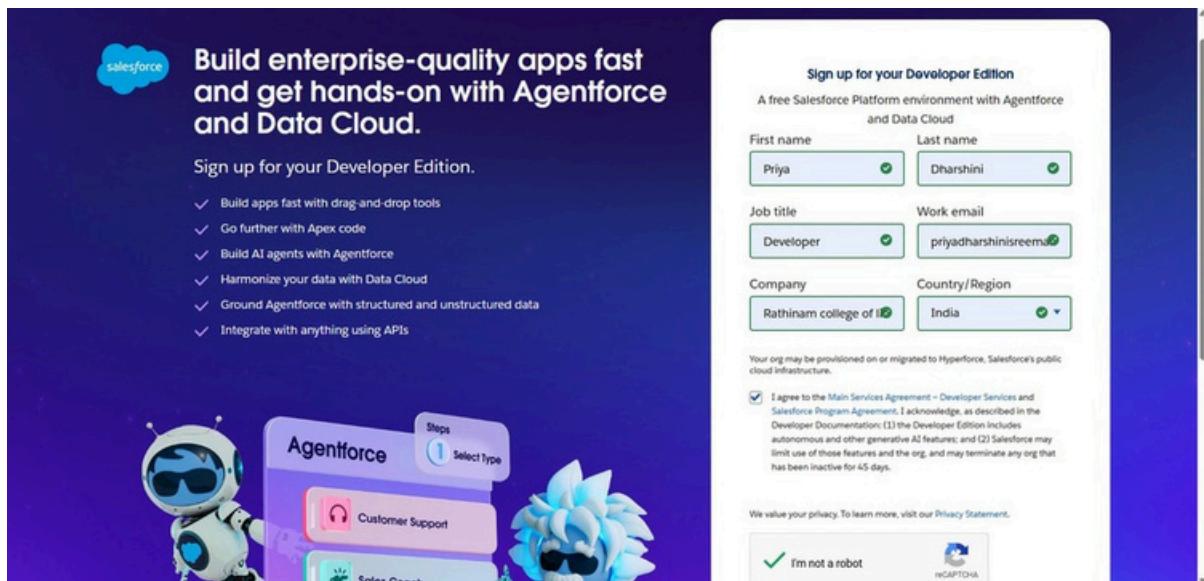
**management** is to ensure the **efficient, safe, and cost-effective operation** of a garage—whether it's an automotive repair shop, service center, or fleet maintenance facility. It involves organizing and overseeing all aspects of the garage's operations to deliver high-quality service and maintain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

# Milestone 1: Salesforce

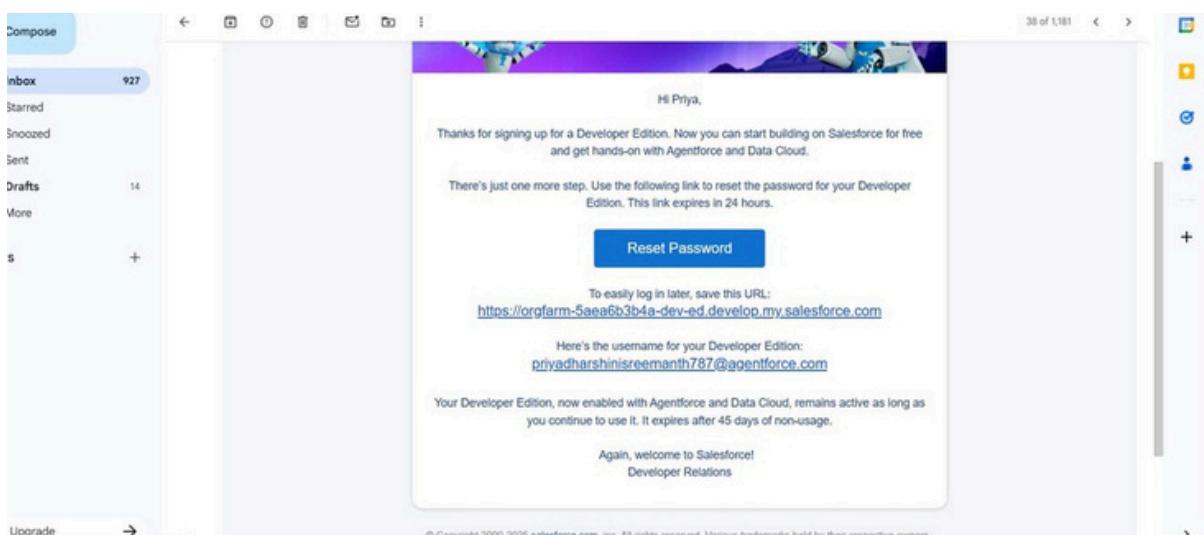
## i) Creating Developer Account:

Using this URL-

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

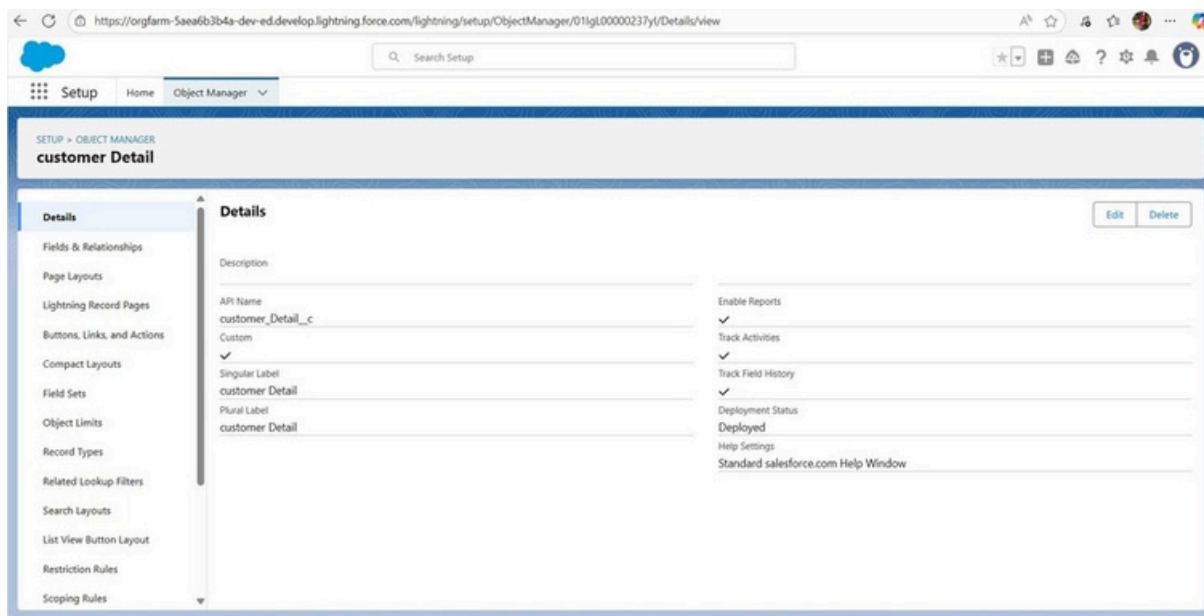


## ii) Account Activation



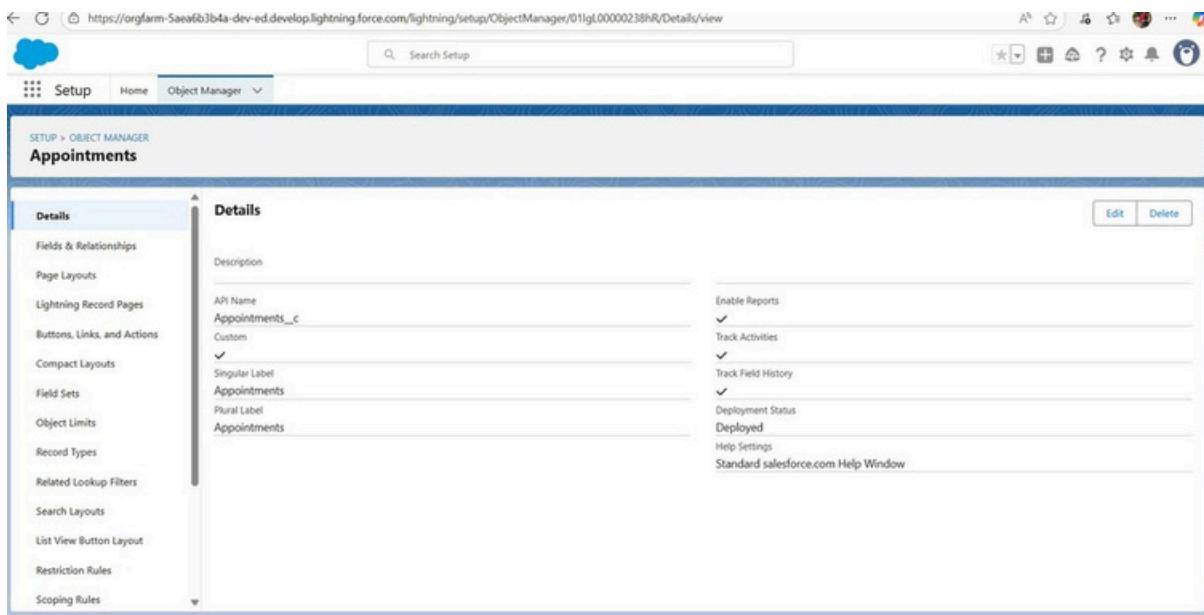
## Milestone 2: Object

### 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/01lgL00000237yU/Details/view. The page title is "SETUP > OBJECT MANAGER" and the specific object name is "customer Detail". The left sidebar lists various setup categories like Fields & Relationships, Page Layouts, and Lightning Record Pages. The main "Details" tab is selected. The API Name field is set to "customer\_Detail\_c". Other settings include: Description (empty), Singular Label ("customer Detail"), Plural Label ("customer Detail"), Enable Reports (checked), Track Activities (checked), Track Field History (checked), Deployment Status ("Deployed"), and Help Settings ("Standard salesforce.com Help Window"). Buttons for "Edit" and "Delete" are at the top right.

### 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/01lgL00000238hRv/Details/view. The page title is "SETUP > OBJECT MANAGER" and the specific object name is "Appointments". The left sidebar lists various setup categories. The main "Details" tab is selected. The API Name field is set to "Appointments\_c". Other settings include: Description (empty), Singular Label ("Appointments"), Plural Label ("Appointments"), Enable Reports (checked), Track Activities (checked), Track Field History (checked), Deployment Status ("Deployed"), and Help Settings ("Standard salesforce.com Help Window"). Buttons for "Edit" and "Delete" are at the top right.

### iii)Creating service records:

The screenshot shows the Salesforce Setup interface under the Object Manager. A new object named 'Service records' is being created. The 'Details' tab is selected, showing the following configuration:

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

The left sidebar lists various object settings: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts (selected), Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules.

#### iv) Creating Billing details and feedback:

The screenshot shows the Salesforce Setup interface under the Object Manager. A new object named 'Billing details and feedback' is being created. The 'Details' tab is selected, showing the following configuration:

- Description:** Billing details and feedback
- 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
- Help Settings:** Standard salesforce.com Help Window

The left sidebar lists various object settings: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts (selected), Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules.

## Milestone 3: Tabs

## i)Creating custom tabs:

The screenshot shows the Salesforce Setup interface under the Object Manager for the Appointments object. On the left, a sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main panel displays the 'Data Type' configuration for Appointments. It includes a list of options such as None Selected, Auto Number, Formula, Roll Up Summary, Lookup Relationship, Master Detail Relationship, External Lookup Relationship, Checkbox, Currency, Date, Date/Time, and Email. Each option has a detailed description of its function and usage.

The screenshot shows the Salesforce Setup interface under the Object Manager for the Appointments object. The user is in the process of creating a new custom field. The 'New Custom Field' screen is titled 'Step 2. Enter the details'. The user has entered 'Maintenance service' as the Field Label, 'Maintenance\_service' as the Field Name, and 'Maintenance service' as the Description. The Default Value is set to 'Unchecked'. There is also a checkbox option to 'Add this field to existing custom report types that contain this entity'. Navigation buttons for 'Previous', 'Next', and 'Cancel' are visible at the bottom right.

## ii)Creating Remaining Tabs

Custom Object Tabs

Action	Label	Tab Style	Description
Edit   Del	Appointments	Rank	
Edit   Del	Billing details and feedback	Blocks	
Edit   Del	customer Detail	Bell	
Edit   Del	Service records	Call	

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 Manager

External Client Apps

App Launcher

App Name ↑	Developer Name	Description	Last Modified...	Ap...	Vl...
All Tabs	AllTabSet	Build CRM Analytics dashboards and apps	9/1/2025, 9:07 PM	Classic	
Analytics Studio	Insights	Build CRM Analytics dashboards and apps	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 AM	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**

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

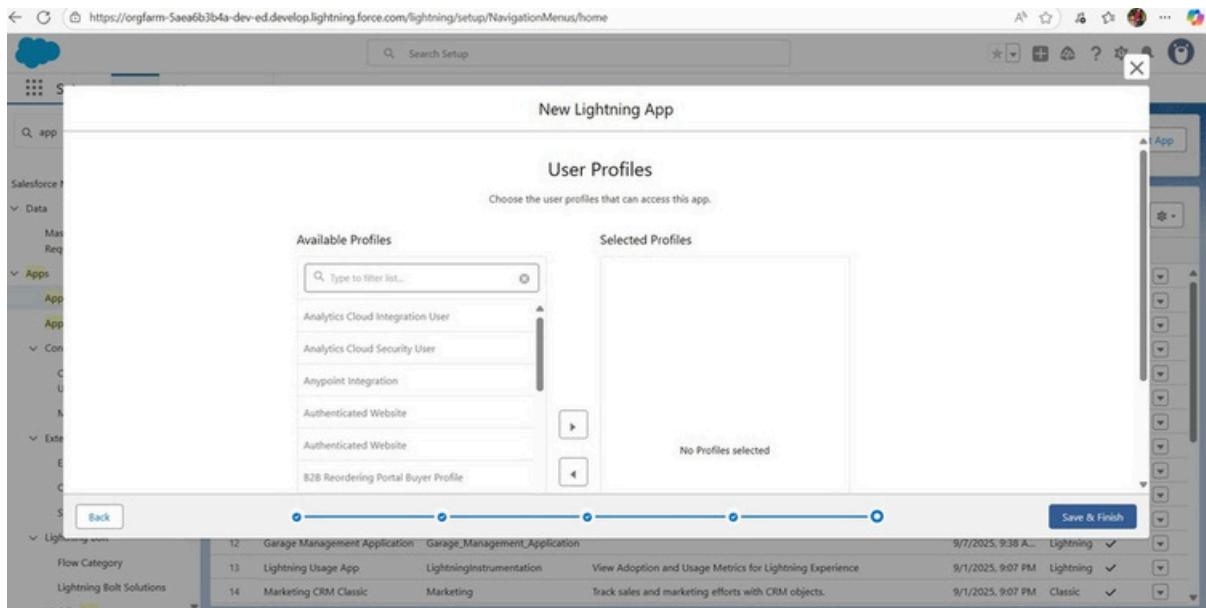
**Selected Items**

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

Next

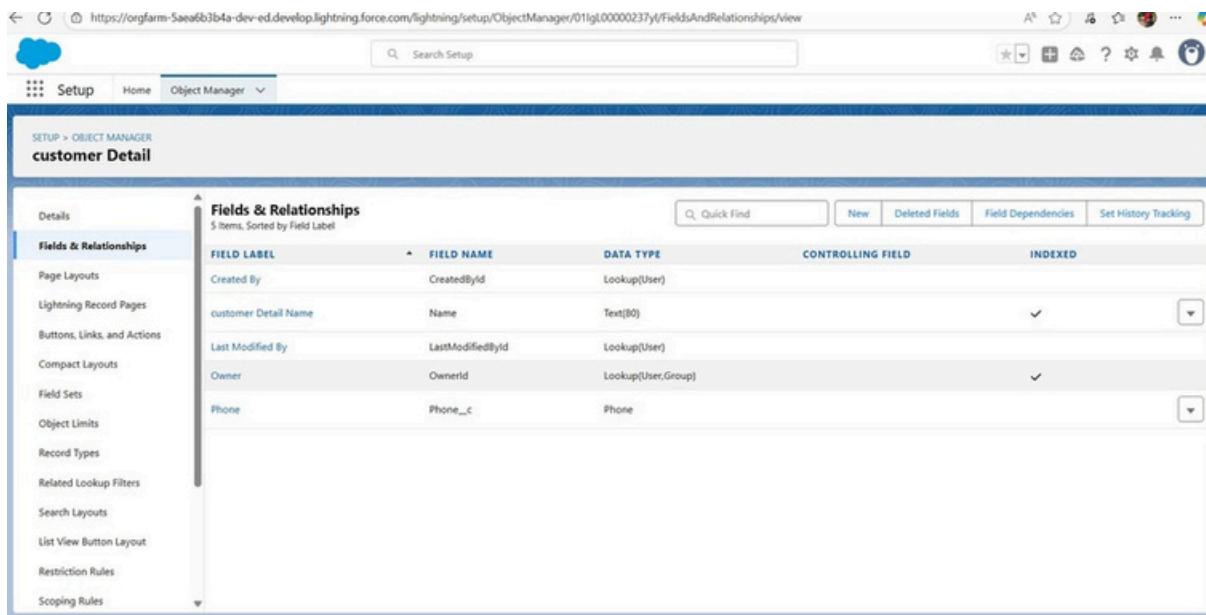
12 Garage Management Application Garage\_Management\_Application 9/7/2025, 9:38 A... Lightning ✓

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

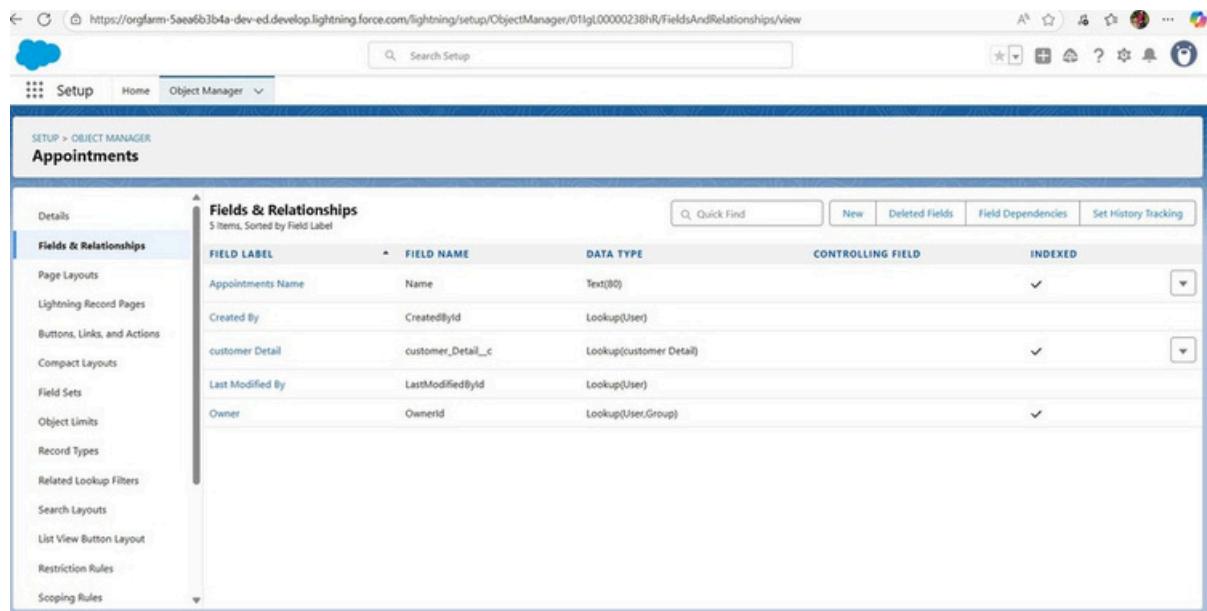


## Milestone 5: Fields

### i) Creation of fields for the Customer Details object



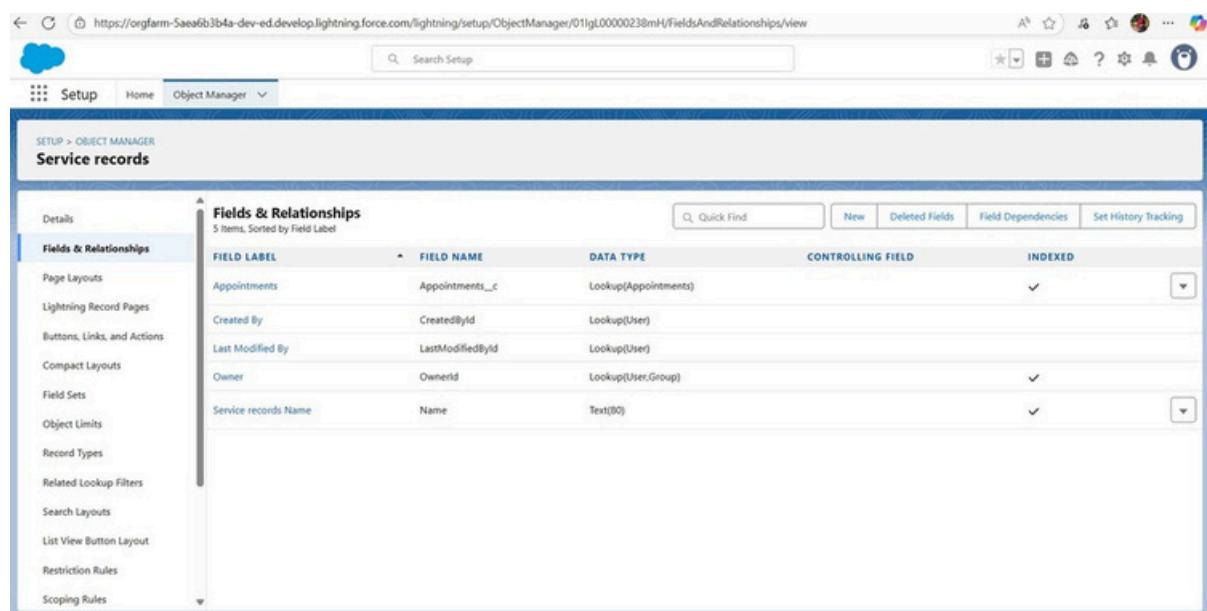
## ii) Creation of Lookup Fields



The screenshot shows the Salesforce Setup interface for the Appointments object. The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, etc. The main content area displays the 'Fields & Relationships' section for the Appointments object. It shows five items, sorted by Field Label. The table includes columns for 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)		
Owner	OwnerId	Lookup(User,Group)		✓

## iii) Creation of Checkbox Fields



The screenshot shows the Salesforce Setup interface for the Service records object. The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, etc. The main content area displays the 'Fields & Relationships' section for the Service records object. It shows five items, sorted by Field Label. The table includes columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

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)		✓
Service records Name	Name	Text(80)		✓

## iv) Creation of date Fields

The screenshot shows the Salesforce Object Manager interface. The left sidebar is titled 'FIELDS & RELATIONSHIPS' under 'SETUP > OBJECT MANAGER'. The main content area is titled 'Fields & Relationships' and shows a table with five items. The table columns are: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The items listed are:

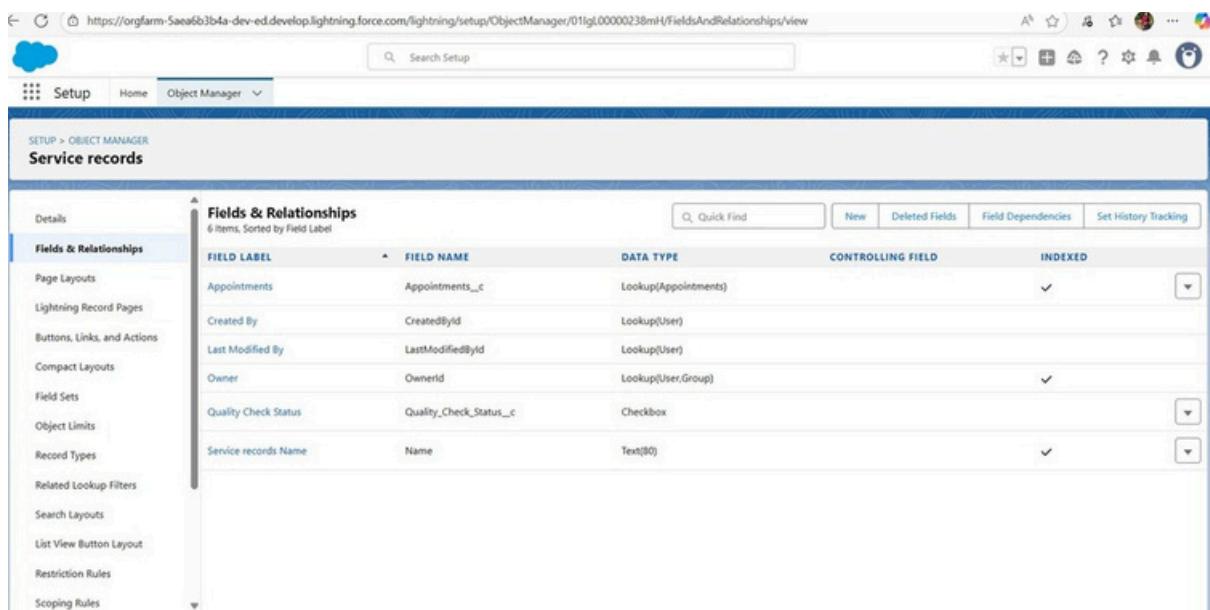
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Billing details and feedback Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Service records	Service_records__c	Lookup(Service records)		✓

## v) Creation of Currency Fields

The screenshot shows the Salesforce Object Manager interface. The left sidebar is titled 'FIELDS & RELATIONSHIPS' under 'SETUP > OBJECT MANAGER'. The main content area is titled 'Fields & Relationships' and shows a table with seven items. The table columns are: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The items listed are:

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		

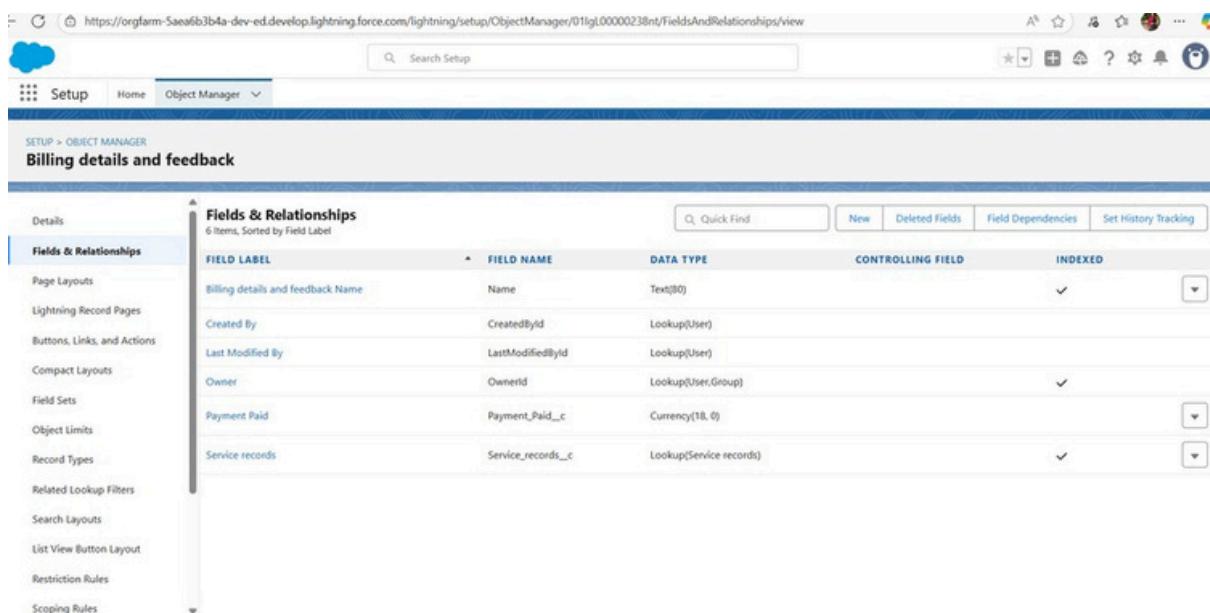
## vi)Creation of Text Fields



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

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

The main area displays the "Validation Rule Edit" screen for the "Vehicle" role. The "Role Name" field is set to "Vehicle". The "Active" checkbox is checked. The "Description" field is empty. The "Error Condition Formula" field contains the expression: `NOT (REGEX( Vehicle_number_plate__c , "[A-Z]{2}[0-9]{2}[A-Z]{2}[0-9]{4}"))`. A tooltip for this formula states: "Display an error if Discount is more than 30% If this formula expression is true, display the text defined in the Error Message area". A dropdown menu titled "Functions" is open, showing options like ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN, etc. A "Quick Tips" box is visible in the top right corner, containing "Operators & Functions".

**Error Message**

**Example:** Discount percent cannot exceed 30%

This message will appear when Error Condition formula is **true**

**Error Message** Please enter valid number

This error message can either appear at the top of the page or below a specific field on the page

**Error Location**  Top of Page  Field **Vehicle number plate** [i](#)

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

The screenshot shows the 'Object Manager' page for 'Appointments Validation Rule'. The validation rule detail is displayed with the following information:

- 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:** (empty)
- Created By:** Priya.Dharshini, 9/8/2025, 1:02 AM
- Active:** ✓
- Error Location:** Vehicle number plate
- 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 page. It displays one item: 'rating\_should\_be\_less\_than\_5'.

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: All Matching Rules**  
This screenshot shows the "Matching Rules" page under the "Data" section of the setup menu. It displays a table of existing matching rules, with one row selected: "Match customer detail" (Rule Name), "Customer Detail" (Object), "Active" (Status), and "9/6/2025" (Last Modified Date). A navigation bar at the top includes "Help for this Page" and a "New Rule" button.

**Screenshot 2: New Matching Rule - Step 1: Select object**  
This screenshot shows the "New Matching Rule" wizard. The first step, "Step 1: Select object", asks to select the object for the rule. The "Object" dropdown is set to "Customer Detail". Navigation buttons "Next" and "Cancel" are visible at the bottom right.

**Screenshot 3: Duplicate Rules - Customer Detail duplicate**  
This screenshot shows the "Duplicate Rules" page under the "Data" section. It displays a table for a specific rule named "Customer Detail duplicate". The rule details are as follows:

Field	Value
Role 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	<input checked="" type="checkbox"/>
Matching Rule	<input checked="" type="checkbox"/> Matching customer details <input checked="" type="checkbox"/> Mapped
Conditions	
Created By	Esha Dharshini 9/6/2025, 1:17 AM

On the right side of the table, there are sections for "Operations On Create" (Alert, Report), "Operations On Edit" (Alert, Report), and "Matching Criteria" (customer Detail: Email EXACT Match(Blank = FALSE) AND customer Detail: Phone EXACT Match(Blank = FALSE)).

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

The screenshot shows the Salesforce Setup interface under the Data category. The left sidebar has a search bar and navigation links for Duplicate Management (Duplicate Error Logs, Duplicate Rules), Matching Rules, and Global Search help.

The main content area displays the 'Customer Detail duplicate' Duplicate Rule. The rule details are as follows:

Duplicate Rule Detail	
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	<input checked="" type="checkbox"/>
Matching Rule	<input checked="" type="checkbox"/> Matching customer details <input checked="" type="checkbox"/> Mapped
Conditions	
Created By	Esha Dharshini 9/8/2025, 1:17 AM
Operations On Create	<input checked="" type="checkbox"/> Alert <input checked="" type="checkbox"/> Report
Operations On Edit	<input type="checkbox"/> Alert <input type="checkbox"/> Report
Matching Criteria	{customer Detail: Gmail Exact MatchBlank = FALSE} AND {customer Detail: Phone Exact MatchBlank = FALSE}
Modified By	Esha Dharshini 9/8/2025, 1:17 AM

Buttons at the bottom include Edit, Delete, Close, and Deactivate.

The screenshot shows the Salesforce Setup interface under the Data category. The left sidebar has a search bar and navigation links for Duplicate Management (Duplicate Rules, Matching Rules), Matching Rules, and Global Search help.

The main content area displays the 'Matching customer details' Matching Rule. The rule details are as follows:

Matching Rule Detail	
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
Created By	Esha Dharshini 9/8/2025, 1:17 AM

A modal window titled 'Matching Rule Activation' is displayed, stating: "We're activating your matching rule. We'll send an email to esha.dharshini@gmail.com when the activation process is complete." It includes 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 the modal, there is a field labeled 'Existing Profile' with 'Standard User' selected. Below it, 'User License' is set to 'Salesforce' and 'Profile Name' is set to 'manager'. At the bottom of the modal are 'Save' and 'Cancel' buttons.

The screenshot shows the 'Profile Detail' screen for the 'manager' profile. It includes sections for 'Page Layouts' and 'Standard Object Layouts'. In the 'Page Layouts' section, 'Home Page Layout' is assigned to 'Home Page Default'. In the 'Standard Object Layouts' section, various layouts are assigned to different objects like Account, Lead, Location, etc.

The screenshot shows the 'Custom App Settings' and 'Service Provider Access' screens. Under 'Custom App Settings', 'Analytics Studio (standard\_\_Insights)' is visible and default. 'App Launcher (standard\_\_AppLauncher)' is visible. 'Garage Management Application (Garage\_Management\_Application)' is visible and default. Under 'Service Provider Access', 'Platform (standard\_\_Platform)' is visible and default. 'WDC (standard\_\_Work)' is visible.

Contact Point Emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User External Credentials	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
<b>Custom Object Permissions</b>							
Appointments	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Billing details and feedback	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
customer Detail	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Service records	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Session Settings</b>							

## ii) sales person Profile

Contact Point Consents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Custom Object Permissions</b>							
Appointments	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Billing details and feedback	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
customer Detail	<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 checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Session Settings</b>							

Session Times Out After  [i]

Session Security Level Required at Login  [i]

**Password Policies**

https://orgfarm-5ae6b3b4a-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e0L000004UCEL%3Fsetupid%3DEnhancedProfiles%26appLayout%3D... A ...

**Profiles**

**Manager**

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.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges \[i\]](#) | [Enabled Apex Class Access \[i\]](#) | [Enabled Visualforce Page Access \[i\]](#) | [Enabled External Data Source Access \[i\]](#) | [Enabled Named Credential Access \[i\]](#) | [Enabled External Credential Principal Access \[i\]](#) | [Enabled Custom Metadata Type Access \[i\]](#) | [Enabled Custom Setting Definitions Access \[i\]](#) | [Enabled Flow Access \[i\]](#) | [Enabled Service Presence Status Access \[i\]](#) | [Enabled Custom Permissions \[i\]](#)

Profile Detail		Edit Close Delete View Users	
Name	Manager	Custom Profile	<input checked="" type="checkbox"/>
User License	Salesforce		
Description			
Created By	Prava Dharshini 9/8/2025, 1:22 AM	Modified By	Prava Dharshini 9/8/2025, 1:32 AM

**Page Layouts**

Standard Object Layouts	Global	Location Group Assignment
Email Application	Global Layout [View Assignment] Not Assigned	Macro Layout [View Assignment] Object Milestone Layout [View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Correct Milestone Layout [View Assignment]
Account	Account Layout [View Assignment]	Operating Hours Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Opportunity Layout [View Assignment]
Appointment Invitation	Appointment Invitation Layout	Opportunity Product 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 navigation links like 'Sales', 'Service', and 'Case Teams'. The main content area has a title 'Understanding Roles' with a sub-section 'Sample Role Hierarchy'. It displays a hierarchical tree of roles:

- Executive Staff**:
  - CEO - President**: View & edit data, roll up forecasts, & manage reports for all users below.
  - CFO - VP, Sales**: Can't access data of other Executive Staff.
- Western Sales Director**:
  - Western Sales Rep**: CA Sales Rep, OR Sales Rep.
- Eastern Sales Director**:
  - Eastern Sales Rep**: NY Sales Rep, MA Sales Rep.
- International Sales Director**:
  - International Sales Rep**: Asian Sales Rep, European Sales Rep.

Each role node contains a small icon of a person and a brief description of its permissions.

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 of roles under 'Rathinam college of liberal arts and science' (which is collapsed):

- Rathinam college of liberal arts and science** (Edit | Del | Assign)
  - 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 setup categories like Cases, Contact Roles, and Case Teams. The main area is titled 'New Role' under 'Role Edit'. The 'Label' field is set to 'manager', 'Role Name' is also 'manager', and 'This role reports to' is set to 'CEO'. A note says 'Role Name as displayed on reports' is 'managed'. At the bottom are 'Save', 'Save & New', and 'Cancel' buttons.

The screenshot shows the details of the 'Manager' role. The 'Role Detail' section shows it reports to 'CEO' (Modified by Priti Dharshini, 9/9/2025, 1:47 AM). It has 'Opportunity Access' and 'Case Access'. The 'Role Name' is 'Manager'. The 'Role Name as displayed on reports' is 'managed'. Below this is a table for 'Sharing Groups' and 'Role, Role and Internal Subordinates'. 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, specifically the Roles management screen.

**Screenshot 1: Roles Overview**

This screenshot shows the main Roles page in the Setup menu. The sidebar includes links for Sales, Service, and Case Teams. The main area lists various roles under categories like CEO, CFO, CDO, Manager, and various departmental roles such as Customer Support and Sales & Marketing. Each role entry has options to Add Role, Edit, Delete, or Assign users.

**Screenshot 2: Role Detail - sales\_person**

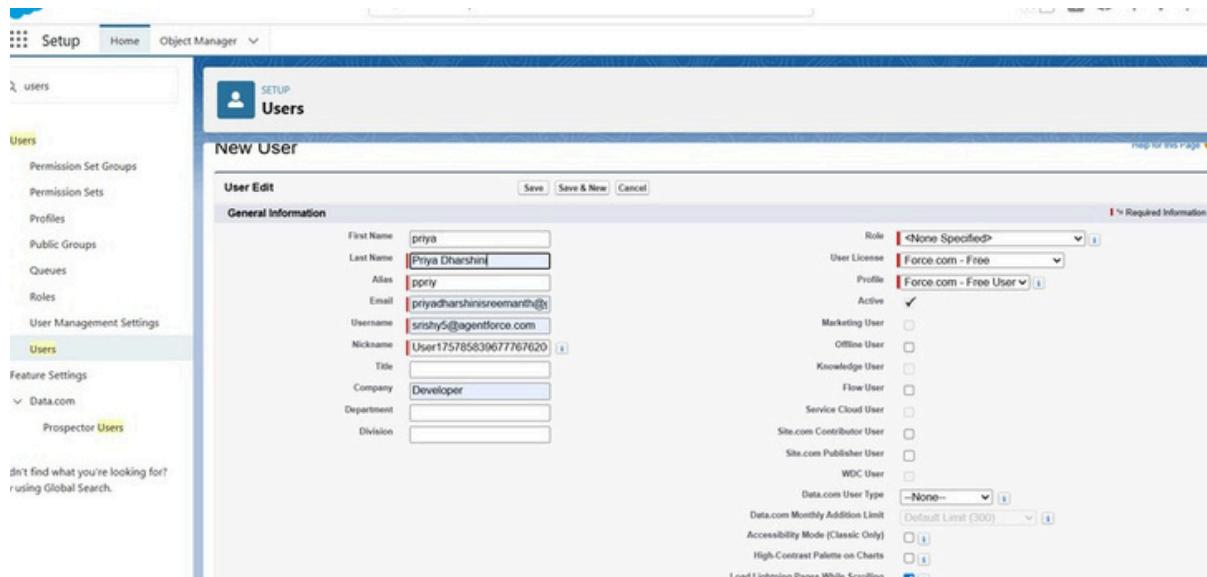
This screenshot shows the details for the 'sales\_person' role. The role is assigned to the 'Manager' category. The 'Role Detail' section shows the following information:

- Label:** sales person
- This role reports to:** Manager
- Modified by:** Priya Dharshini, 9/8/2025, 1:50 AM
- Opportunity Access:** Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities.
- Case Access:** Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases.

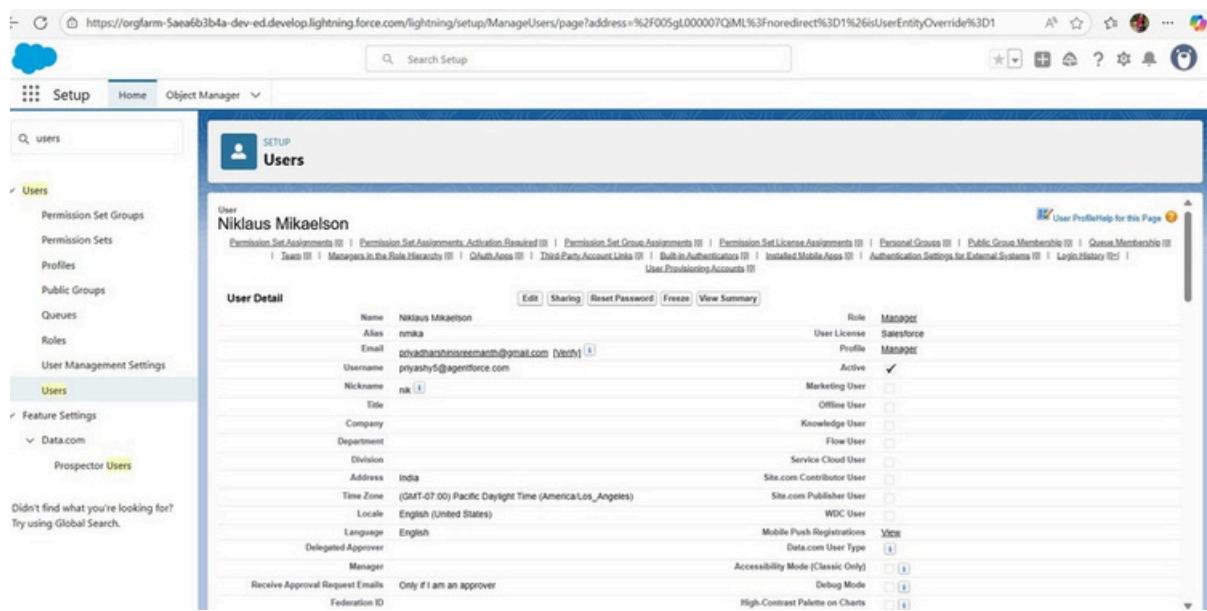
The 'Users in sales\_person Role' section indicates 'No records to display'.

## 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 URL [https://orgfarm-5aea6b3b4a-dev-ed.lightning.force.com/lightning/setup/PublicGroups/page?address=%2Fp%2Fown%2FOrgPublicGroupsPage%2Fd%3freURL%3D%252Fsetup%252F...](https://orgfarm-5aea6b3b4a-dev-ed.lightning.force.com/lightning/setup/PublicGroups/page?address=%2Fp%2Fown%2FOrgPublicGroupsPage%2Fd%3FreURL%3D%252Fsetup%252F...). The left sidebar is open with the search bar containing "pub". The main content area is titled "Public Groups" and displays a table of existing public groups. One group is listed: "sales\_team" (Group Name), "Charles\_Evra" (Created By), and "9/8/2025, 6:30 AM" (Created Date). The table has columns for Action, Label, Group Name, Created By, and Created Date.

## Milestone 12: Share setting

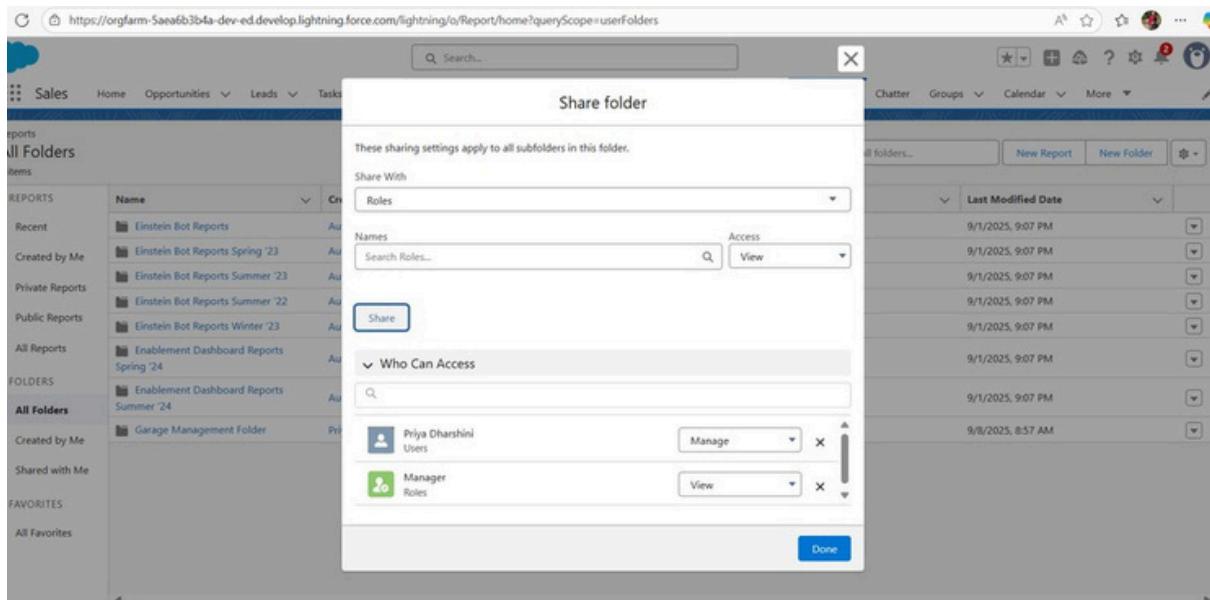
### i)Creating Sharing settings

The screenshot shows the Salesforce Reports interface with the URL <https://lightningprod-5aea6b3b4a-dev-ed.lightning.force.com/lightning/cmp/ReportSectionController/reportSection>. The left sidebar shows "Reports" and "Recent" sections. A modal window titled "Create folder" is open, prompting for a "Folder Label" (Garage Management Folder) and a "Folder Unique Name" (GarageManagementFolder). The "Save" button is visible at the bottom right of the modal.



The folder named Garage Management Folder was created.





## Milestone 13: Flows

### i) Create a Flow

The screenshot shows the Salesforce Setup interface, specifically the "Flows" section. It displays a list of existing flow definitions, including labels like "Add or Modify Service Appointment Attendees" and "Approvals Workflow: Evaluate Approval Requests".

Flow Label	Process Type	Active	Tem...	Package State	Pack...	Last Modifi...	Last Modified D...
Add or Modify Service Appointment Attendees	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-installed			
Approvals Workflow: Evaluate Approval Requests	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed			
Approvals Workflow: Process Approval Submission	Screen Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-installed			
Authentication Provider User Registration	Identity User Registration Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed			
Basic Approval Request	Flow Orchestration for CMS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed			
Billing Amount Flow	Autolaunched Flow	<input type="checkbox"/>	<input type="checkbox"/>	Unmanaged	Priya Dharshini	9/13/2025, 4:09 AM	
Book Appointment from Invitation	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed			
Cancel Item Flow	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed			
Change Case Owner to Incident Owner	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed			
Chats Routed to Agents and Queues	Omni-Channel Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed			
Chats Routed to Agents with the Right Skills	Omni-Channel Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed			
Check Flow API Name	Autolaunched Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-installed			

[https://orgfarm-5aea6b3b4a-dev-ed.lightning.force.com/builder\\_platform\\_interaction/flowBuilder.app](https://orgfarm-5aea6b3b4a-dev-ed.lightning.force.com/builder_platform_interaction/flowBuilder.app)

New Automation

Get Started with Automations

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

Categories

- Triggered
- Scheduled
- Screen
- Autolaunched

Frequently Used

- Record-Triggered Flow
- Screen Flow
- Schedule-Triggered Flow
- Autolaunched Flow (No Trigger)

Flow Builder

Configure Start

Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements: None

Optimize Flow

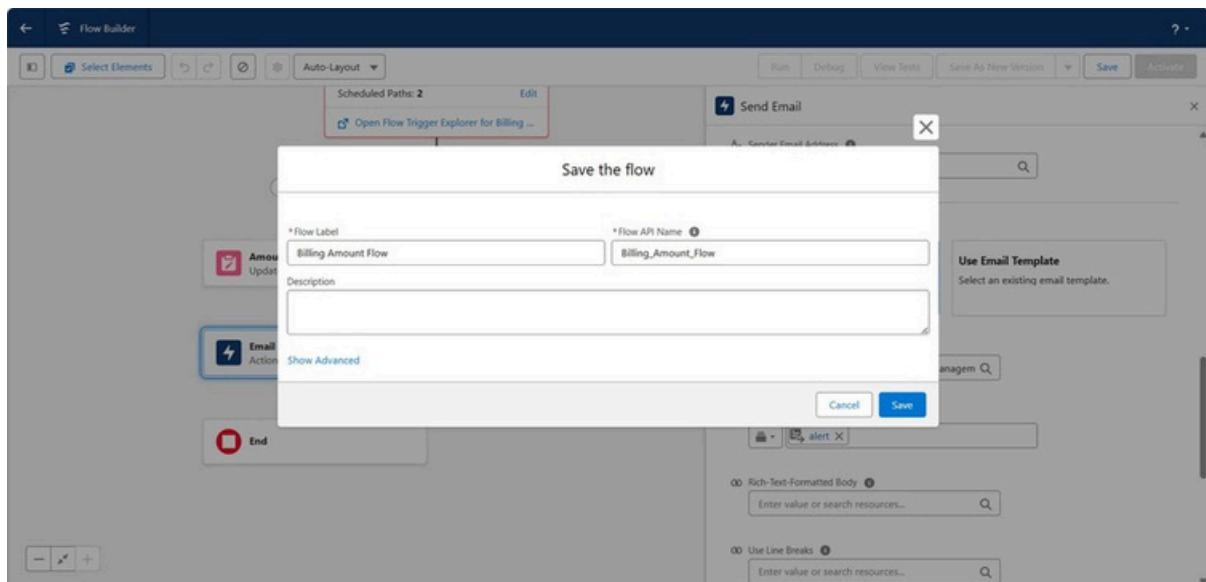
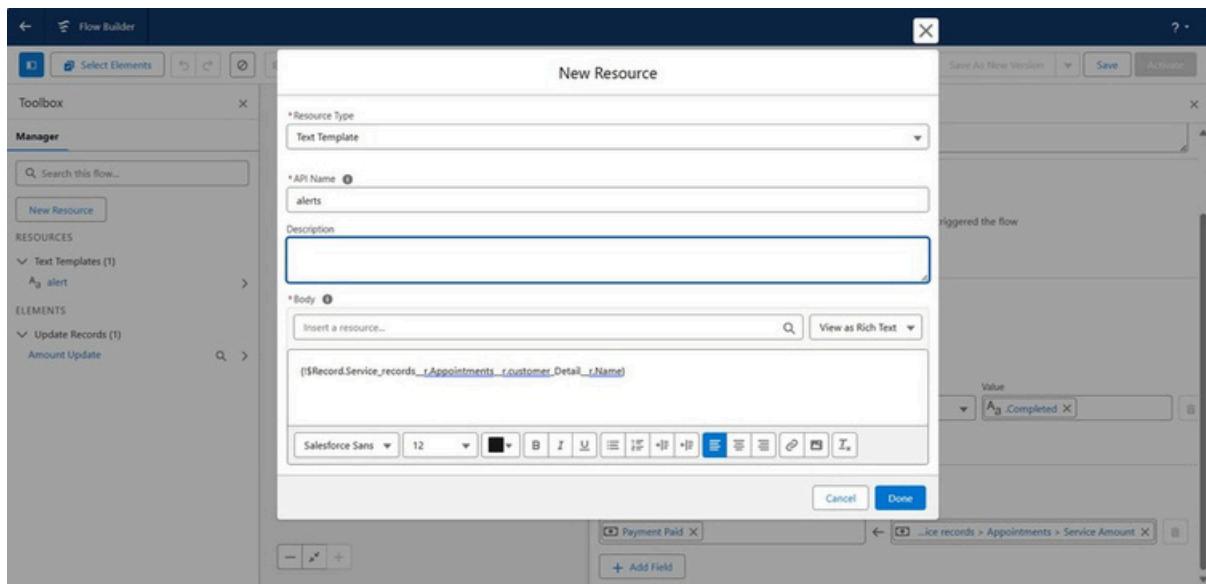
Optimize the Flow for:

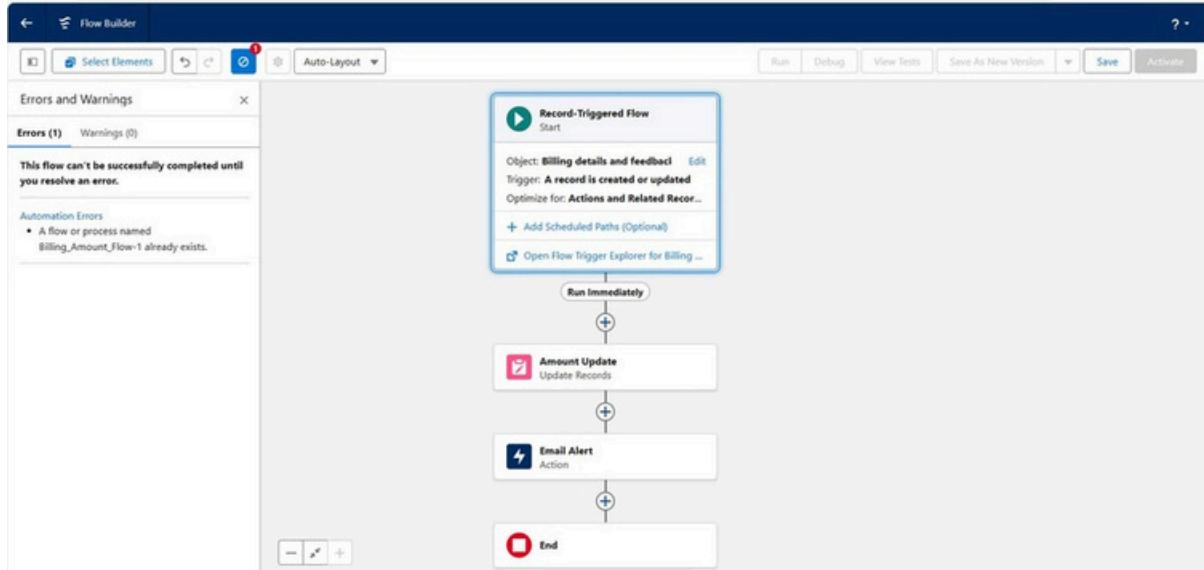
- Fast Field Updates: Update fields on the record that triggers the flow to run. This high-performance flow runs **before the record is saved** to the database.
- Actions and Related Records: Update any record and perform actions, like send an email. This more flexible flow runs **after the record is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

Is this flow making an external callout or connecting to an external system?

An asynchronous path is required for flows that involve external systems.

Add Asynchronous Path:





## ii) Create another Flow

Flow Label	Process Type	Active	Tem...	Package State	Last Modifi...	Last Modified D...
Add or Modify Service Appointment Attendees	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-installed		
Approvals Workflow: Evaluate Approval Requests	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed		
Approvals Workflow: Process Approval Submission	Screen Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-installed		
Authentication Provider User Registration	Identity User Registration Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed		
Basic Approval Request	Flow Orchestration for CMS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed		
Billing Amount Flow	Autolaunched Flow	<input type="checkbox"/>	<input type="checkbox"/>	Unmanaged	Priya Dharshini	9/13/2025, 4:09 AM
Book Appointment from Invitation	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed		
Cancel Item Flow	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed		
Change Case Owner to Incident Owner	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed		
Chats Routed to Agents and Queues	Omni-Channel Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed		
Chats Routed to Agents with the Right Skills	Omni-Channel Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed		
Check Flow API Name	Autolaunched Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-installed		

**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](#)

Search automations...

**Save the flow**

**\*Flow Label**

**\*Flow API Name**

Description

[Show Advanced](#)

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

All Conditions Are Met (AND) ▾

**Flow Builder** | Update Service Status - V1 | Active | Run | Debug | View Tests | Save As New Version | Save | Deactivate

Last saved on 9/13/2025, 06:09 PM

**Record-Triggered Flow**

Object: Service records | Trigger: A record is created or updated | Optimize for: Actions and Related Records

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

Run Immediately

**Update Records**

\* Label: Update Service | \* API Name: Update\_Service

Description:

\* How to Find Records to Update and Set Their Values

- Use the service records record that triggered the flow
- Update records related to the service records 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	Operator	Value
Quality Check Status	Equals	True

+ Add Condition

Set Field Values for the Service records Record

## Milestone 14: Apex trigger

### i) Apex handler

New | Apex Class | Apex Trigger

Apex Trigger

```

dler {
    list<Appointments__c> listApp){
        erList = new list <Service_records__c>();
        ments__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 = 10000;
            }
        }
    }
}

```

Logs | Tests | Checkpoints | Query Editor | View State | Progress | Problems

## New Apex Trigger

Name:

sObject:

```

File Edit Debug Test Workspace Help < >
AmountDistributionHandler.apxc * AmountDistribution.apxt *
Code Coverage: None API Version: 64
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        if(app.Maintenance_service__c == true && app.Repairs__c == true && app.Replacement_Parts__c == true){
12            app.Service_Amount__c = 10000;
13        }
14
15        else if(app.Maintenance service __c == true && app.Repairs __c == true){
16
17
18
19        else if(app.Maintenance_service __c == true && app.Repairs __c == true){
Logs Tests Checkpoints Query Editor ViewState Progress Problems
Name Line Problem

```

```

AmountDistributionHandler.apxc * AmountDistribution.apxt *
Code Coverage: None API Version: 64
19 *         else if(app.Maintenance_service __c == true && app.Repairs __c == true){
20
21             app.Service_Amount__c = 5000;
22
23         }
24
25         else if(app.Maintenance_service __c == true && app.Replacement_Parts__c == true){
26
27             app.Service_Amount__c = 8000;
28
29         }
30
31         else if(app.Repairs__c == true && app.Replacement_Parts__c == true){
32
33             app.Service_Amount__c = 7000;
34
35         }
36
37         else if(app.Maintenance service __c == true){
Logs Tests Checkpoints Query Editor ViewState Progress Problems
Name Line Problem

```

The screenshot shows the Salesforce IDE interface with the code editor open. The code is an Apex class with several conditional statements:

```
Code Coverage: None | API Version: 64
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;
}
```

The tabs at the bottom of the editor are: Logs, Tests, Checkpoints, Query Editor, View State, Progress, and Problems. The Problems tab is currently selected.

The screenshot shows the Salesforce IDE interface with the trigger editor open. The trigger is defined in an Apex class named AmountDistributionHandler.apcc:

```
File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < >
AmountDistributionHandler.apcc * X AmountDistribution.apxt * C
Code Coverage: None | API Version: 64
trigger AmountDistribution on Appointments__c (before insert, before update) {
    if (Trigger.isBefore && (Trigger.isInsert || Trigger.isUpdate)) {
        AmountDistributionHandler.amountDist(Trigger.new);
    }
}
```

**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)) {

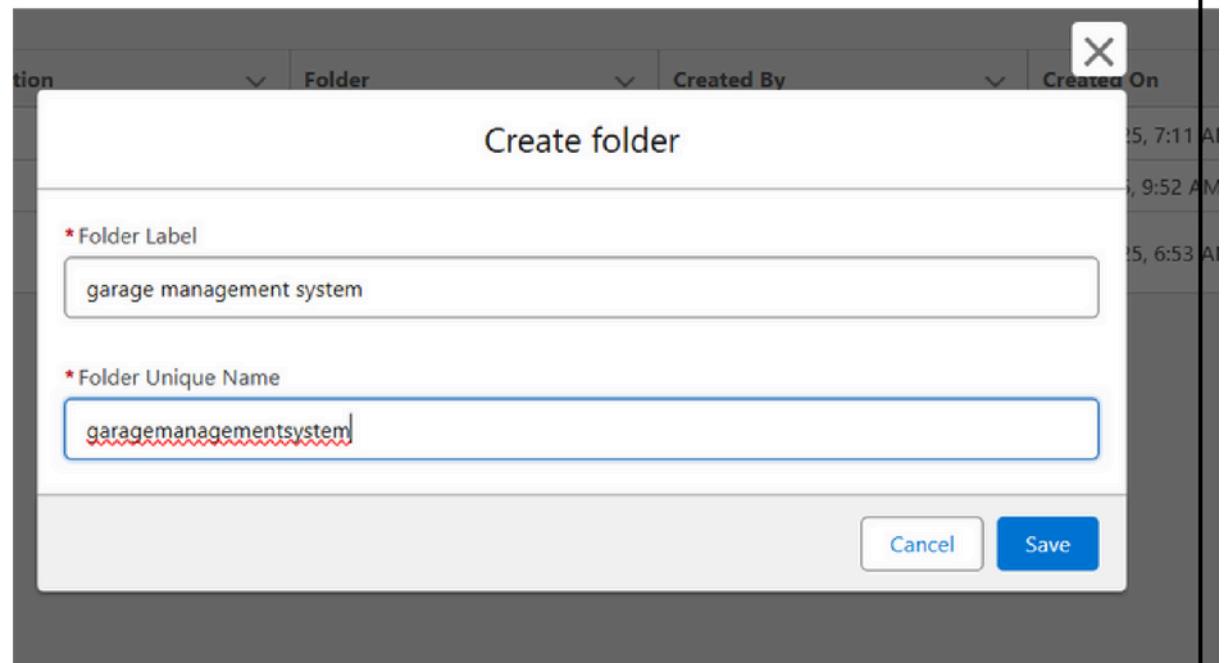
    AmountDistributionHandler.amountDist(Trigger.new);

}

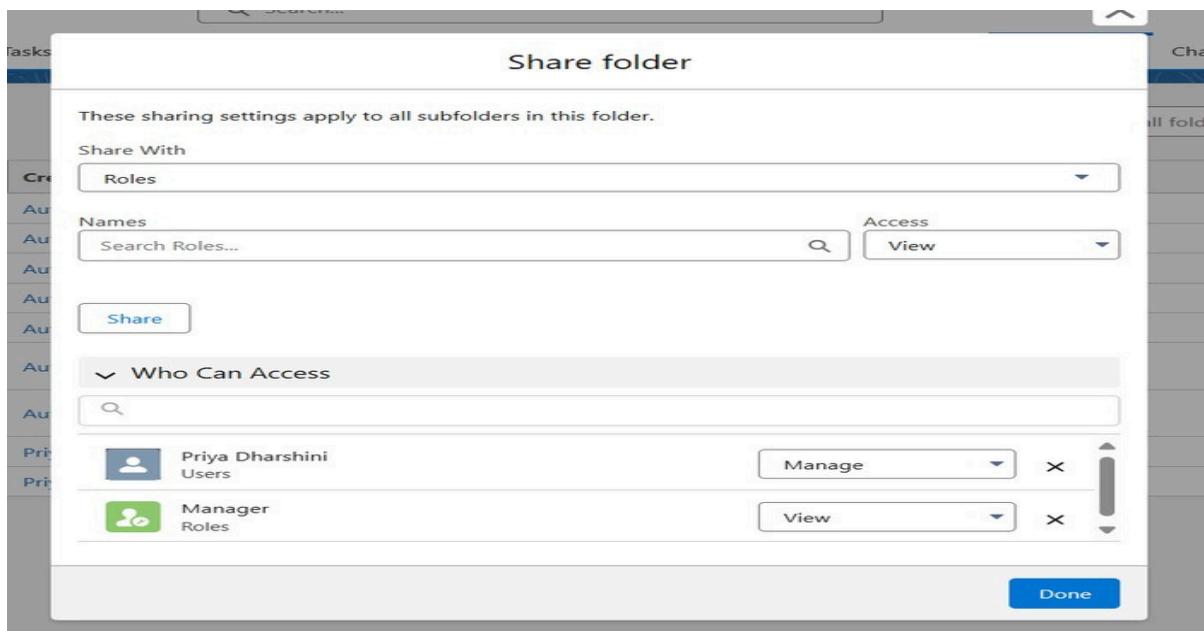
}
```

## Milestone 15: Reports

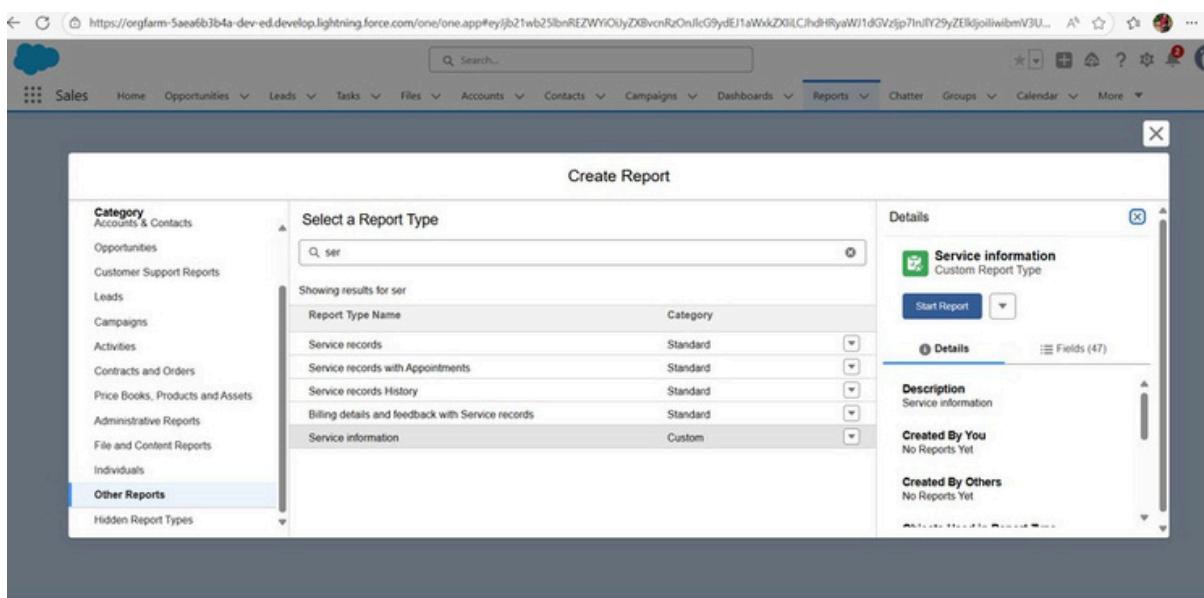
### i)create a report folder



## ii) Sharing a report folder



## iii) Create report type



## iv) Create report

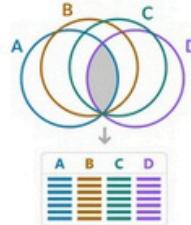
**Details**

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

Outline Filters 

Groups  GROUP ROWS Add group... 

Columns  Add column 

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

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

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

- Show All customer detail
- Set the Created Date filter to All Time
- Edit other filters in the filter panel

Add Chart Save & Run Save Close Run

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

**REPORT** New Service information Report Service information

Rating for service Payment Status Completed Total

	Rating for service	Payment Status	Completed	Total
3	Sum of Payment Paid Record Count	\$300	\$300	1 1
4	Sum of Payment Paid Record Count	\$1,038	\$1,038	2 2
5	Sum of Payment Paid Record Count	\$963	\$963	2 2
<b>Total</b>	Sum of Payment Paid Record Count	<b>\$2,301</b>	<b>\$2,301</b>	5

Sum of Payment

Rating for service

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.	\$566
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

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

Report Service information

**Save Report As**

\* Report Name: New Service information Report

Report Unique Name: New\_Service\_information\_Report\_MRC

Report Description:

Folder: Garage Management Folder

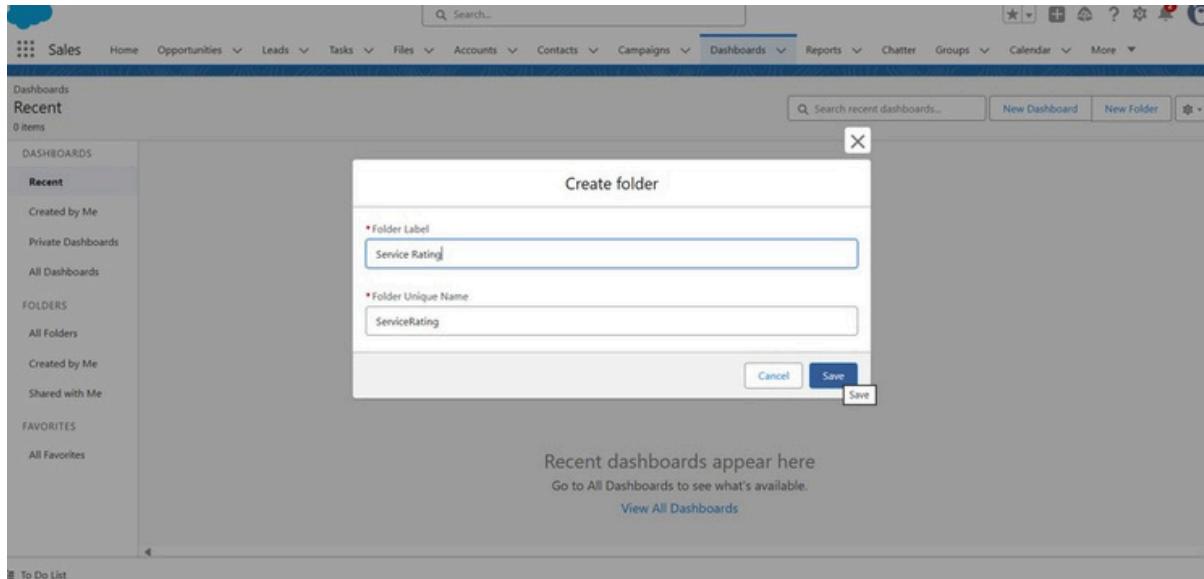
Cancel Save

Customer Detail Name Appointment Date Service Status Payment Paid

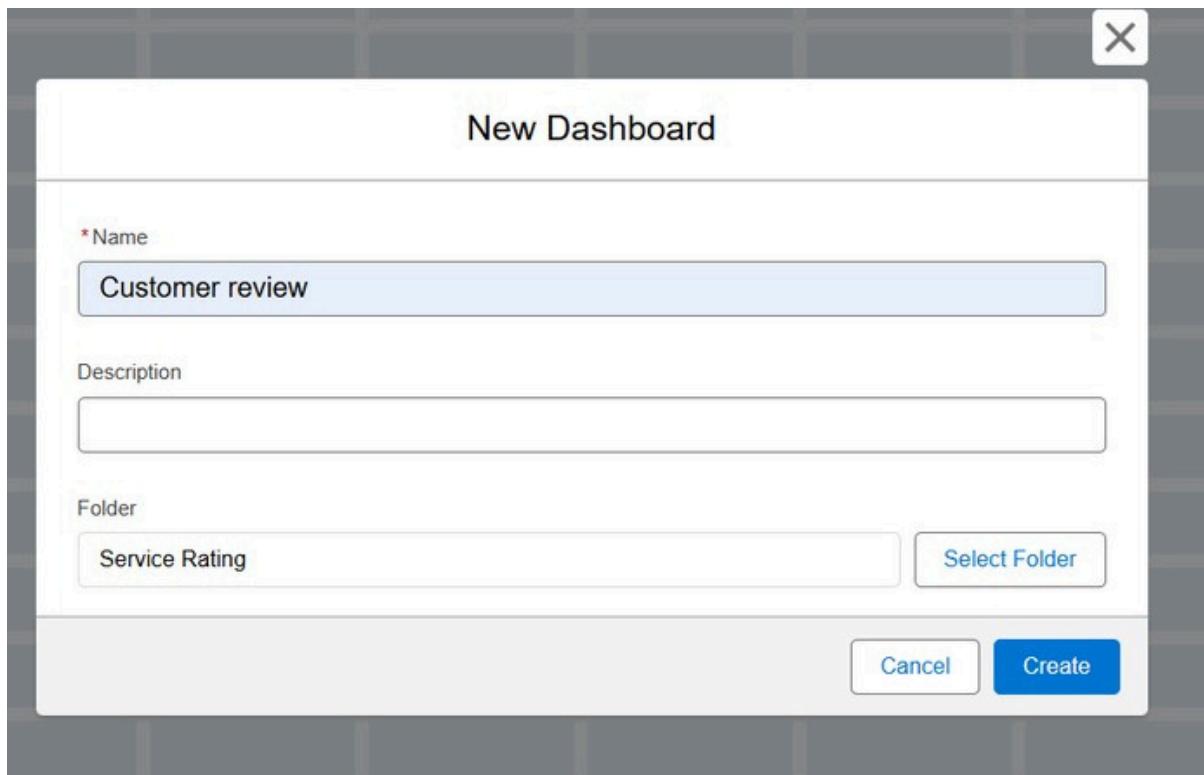
Priya	9/10/2025	Completed.	\$300
Priya	9/10/2025	Completed.	\$452
Priya	9/10/2025	Completed.	\$566
Priya	9/10/2025	Completed.	\$463
Priya	9/10/2025	Completed.	\$500

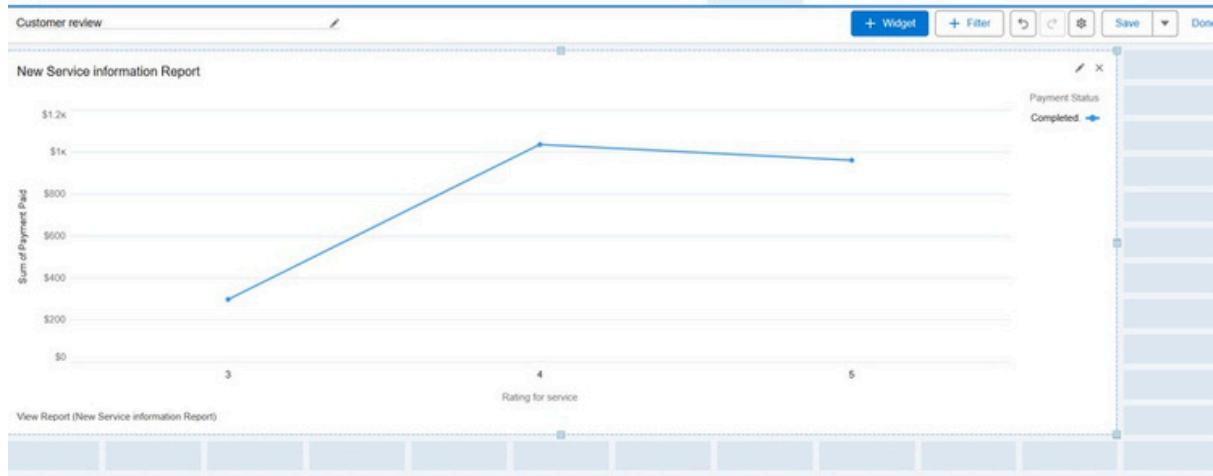
# Milestone 16: Dashboards

## 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

## Milestone 17: User Adoption

# i)creating records

This screenshot shows a customer detail record for 'mac'. The 'Details' tab is selected, displaying fields such as Name (mac), Phone ((567) 876-5567), Email (mac@gmail.com), and Created By (Priya Dharshini). The record was created on 9/10/2025, 9:26 AM. The 'Owner' field shows Priya Dharshini. The 'Activity' sidebar is visible on the right, showing no upcoming or overdue activities.

This screenshot shows an appointment record titled 'Appointment #001'. The 'Details' tab is selected, displaying fields like Appointments Name (Appointment #001), Customer Detail (mac), Maintenance service (checkbox checked), Repairs (checkbox checked), Replacement Parts (checkbox checked), Appointment Date (9/10/2025), Service Amount (\$500), and Vehicle number plate (TS30EU0443). The record was created by Priya Dharshini on 9/10/2025, 9:31 AM. The 'Owner' field shows Priya Dharshini. The 'Activity' sidebar is visible on the right, showing no upcoming or overdue activities.

### 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

Garage Management System

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.**