

# **GARAGE MANAGEMENT SYSTEM**

COLLEGE NAME: VET Institute of arts and science

COLLEGE CODE: 65651

**TEAM ID:**

**TEAM MEMBERS:**

TEAM LEADER NAME : Monisha.K

EMAIL : monishak23sit@vetias.ac.in

TEAM MEMBER 1 : Nithish. P

EMAIL : nithishp23sit@vetias.ac.in

TEAM MEMBER 2 : Indhumathi.K

EMAIL : indhumathik23sit@vetias.ac.in

TEAM MEMBER 3 : Gowsalya.S

EMAIL : gowsalyas23sit@vetias.ac.in

TEAM MEMBER 4 : Sidhura.R

EMAIL : sidhurar23sit@vetias.ac.in

# INTRODUCTION

## PROJECT OVERVIEW



# PURPOSE

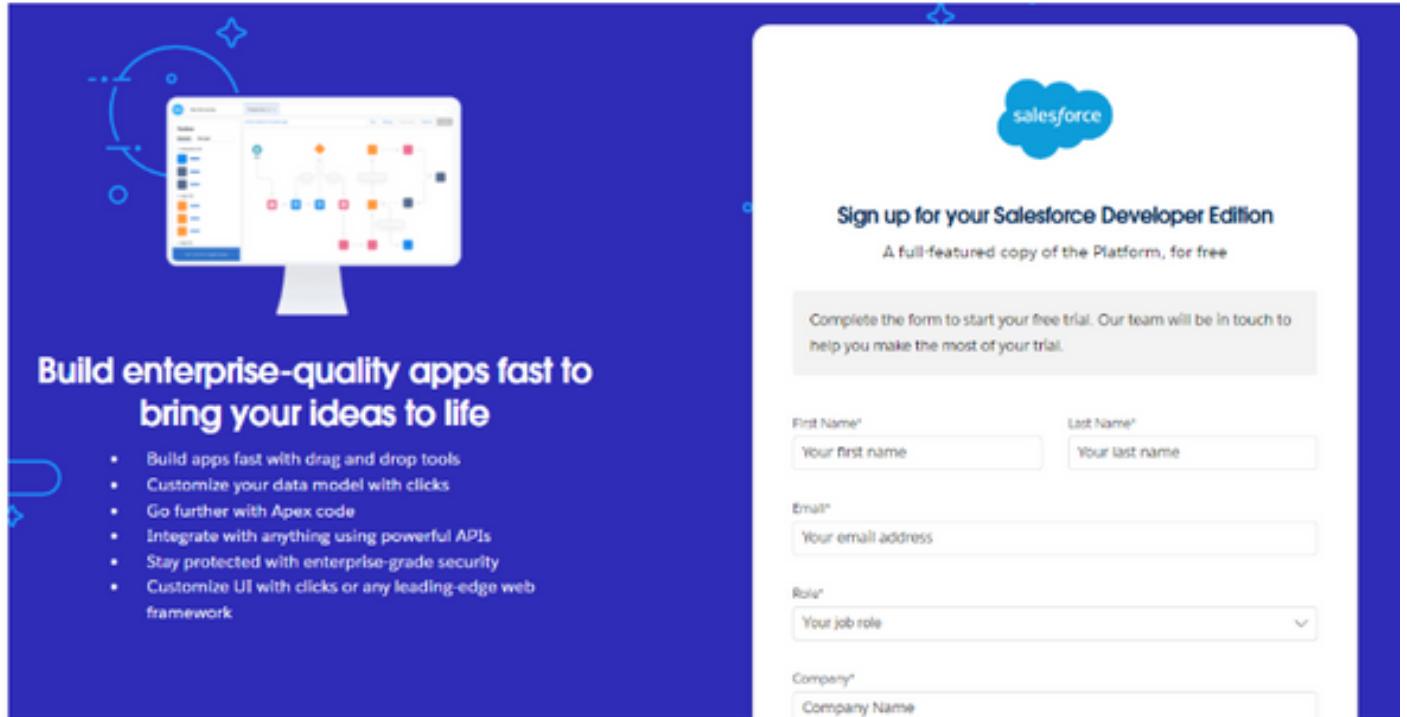
The purpose of the Garage Management System project is to develop a digital solution that streamlines and automates the operations of an automotive garage. This system is designed to manage various aspects of garage workflow, including customer appointments, vehicle repairs, inventory of spare parts, billing, employee tasks, and service history tracking. By replacing manual processes with an integrated system, the project aims to improve efficiency, reduce human error, enhance customer service, and provide real-time data access for better decision-making.

# DEVELOPMENT PHASE

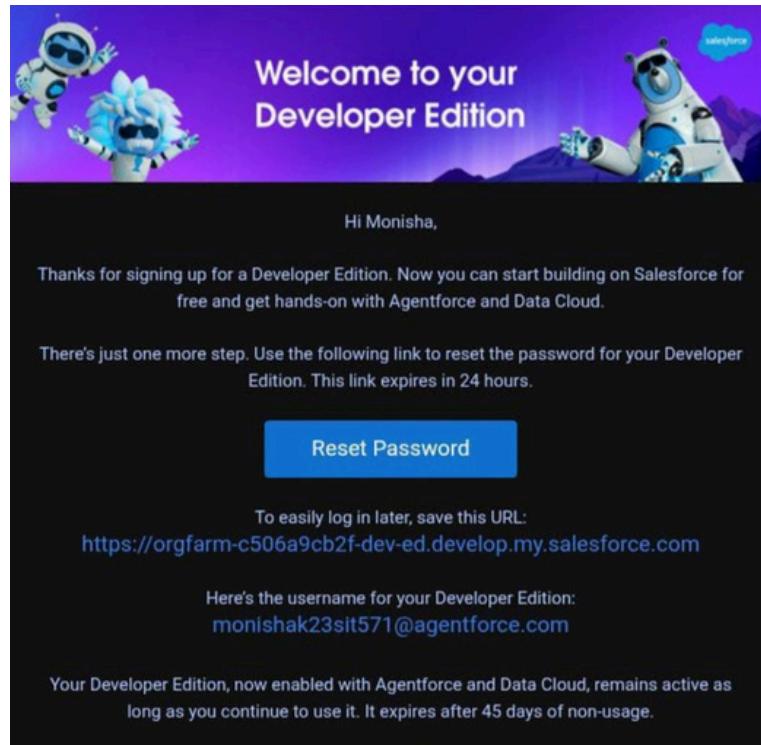
CRETING DEVELOPER ACCOUNT:

BY USING THIS URL: <https://www.salesforce.com/form/developer-signup/?d=pb>

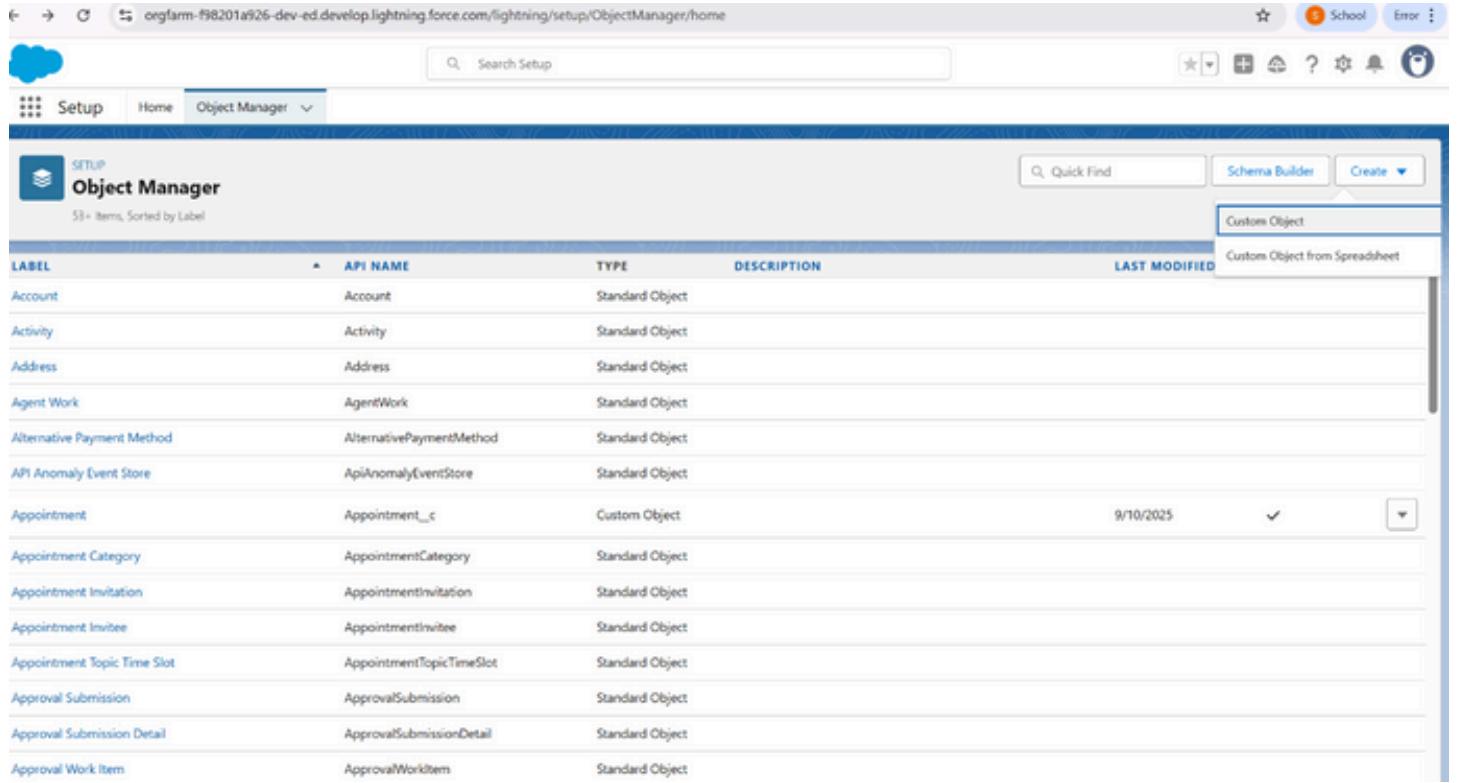
## SALES FORCE CREATING A DEVELOPER ACCOUNT:



## ACCOUNT ACTIVATION



## OBJECT CREATE CUSTOMER



The screenshot shows the Salesforce Object Manager page. At the top, there's a navigation bar with links for Setup, Home, and Object Manager. A search bar labeled "Search Setup" is also present. On the right side of the header, there are various icons for account management and system navigation. The main area is titled "Object Manager" and displays a table of objects. The columns in the table are: LABEL, API NAME, TYPE, DESCRIPTION, and LAST MODIFIED. A filter bar above the table includes fields for "Quick Find", "Schema Builder", and "Create". A dropdown menu in this bar is set to "Custom Object". The table lists numerous standard and custom objects, such as Account, Activity, Address, Agent Work, Alternative Payment Method, API Anomaly Event Store, Appointment, Appointment Category, Appointment Invitation, Appointment Invitee, Appointment Topic Time Slot, Approval Submission, Approval Submission Detail, and Approval Work Item. Most objects are categorized as "Standard Object", except for "Appointment" which is a "Custom Object". The last modified date for "Appointment" is listed as 9/10/2025.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	
Account	Account	Standard Object			
Activity	Activity	Standard Object			
Address	Address	Standard Object			
Agent Work	AgentWork	Standard Object			
Alternative Payment Method	AlternativePaymentMethod	Standard Object			
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object			
Appointment	Appointment_c	Custom Object		9/10/2025	✓
Appointment Category	AppointmentCategory	Standard Object			
Appointment Invitation	AppointmentInvitation	Standard Object			
Appointment Invitee	AppointmentInvitee	Standard Object			
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object			
Approval Submission	ApprovalSubmission	Standard Object			
Approval Submission Detail	ApprovalSubmissionDetail	Standard Object			
Approval Work Item	ApprovalWorkItem	Standard Object			

## CREATE APPOINTMENT OBJECT

The screenshot shows the Salesforce Object Manager interface for the 'Appointment' object. The left sidebar lists various configuration tabs: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits (which is selected), Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, and Object Access. The main content area is titled 'Details' and contains sections for Description, API Name (Appointment\_c), Custom (✓), Singular Label (Appointment), Plural Label (Appointments), and several checkboxes for Reports, Activities, Field History, Deployment Status, Help Settings, and a Standard Help Window. At the bottom right are 'Edit' and 'Delete' buttons.

## CREATE SERVICE RECORDS OBJECTS

Setup | Home | Object Manager

**Object Manager**

53+ items, Sorted by Label

Custom Object

Custom Object from Spreadsheet

Label	API Name	Type	Description	Last Modified
Account	Account	Standard Object		
Activity	Activity	Standard Object		
Address	Address	Standard Object		
Agent Work	AgentWork	Standard Object		
Alternative Payment Method	AlternativePaymentMethod	Standard Object		
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object		
Appointment	Appointment_c	Custom Object		9/10/2025 ✓
Appointment Category	AppointmentCategory	Standard Object		
Appointment Invitation	AppointmentInvitation	Standard Object		
Appointment Invitee	AppointmentInvitee	Standard Object		
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object		
Approval Submission	ApprovalSubmission	Standard Object		
Approval Submission Detail	ApprovalSubmissionDetail	Standard Object		
Approval Work Item	ApprovalWorkItem	Standard Object		

Setup > Object Manager

**Service records**

Details

Fields & Relationships	Description
Page Layouts	
Lightning Record Pages	
Buttons, Links, and Actions	
Compact Layouts	
Field Sets	API Name Service_records_c Custom ✓ Singular Label Service records Plural Label Service records
Object Limits	
Record Types	
Related Lookup Filters	
Search Layouts	
List View Button Layout	
Restriction Rules	
Scoping Rules	
Object Access	

Enable Reports  
✓  
Track Activities  
✓  
Track Field History  
✓  
Deployment Status  
Deployed  
Help Settings  
Standard salesforce.com Help Window

<https://orgfarm-f98201a926-dev-ed.lightning.force.com/one/app#/setup/ObjectManager/01lgL000002SSwz/fieldSets/view>

## CREATE BILLING DETAILS AND FEEDBACK OBJECT

orgfarm-f98201a926-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgL0000025TJR/Details/view

Setup Home Object Manager

Search Setup

SETUP > OBJECT MANAGER

## Billing details and feedback

**Details**

**API Name:** Billing\_details\_and\_feedback\_c

**Description:** 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

**Edit** **Delete**

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  
...

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. In the left sidebar, under 'Fields & Relationships', several items are listed: Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, and Object Access. The main content area displays a table titled 'Fields & Relationships' with 7 items, sorted by Field Label. The columns are: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The data includes:

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 Status	Payment_Status__c	Picklist		
Rating for service	Rating_for_service__c	Text(1)		
Service records	Service_records__c	Lookup(Service records)		✓

## TABS

### CREATING A CUSTOM TAB

The screenshot shows the Salesforce Setup interface with the 'Tabs' search term entered in the search bar. The main content area displays a 'Home' tab card with three sections: 'Data Cloud', 'Get Started with Einstein Bots', and 'Mobile Publisher'. Below the cards is a section titled 'Most Recently Used' with a table showing 10 items. The table columns are: NAME, TYPE, and OBJECT.

NAME	TYPE	OBJECT
Sobika P	User	
Service Information	Custom Report Type	
Collaboration	Custom App	
AmountDistribution	Apex Trigger	Appointment

The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and a search bar. On the left, a sidebar titled 'User Interface' has 'Tabs' selected. The main content area is titled 'Custom Tabs' and contains a table for 'Custom Object Tabs'. The table has columns for 'Action', 'Label', 'Tab Style', and 'Description'. It lists four tabs: 'Appointments' (Castle style), 'Billing details and feedback' (Chess piece style), 'Customer Details' (Rook style), and 'Service records' (Camera style). Below this are sections for 'Web Tabs' (No Web Tabs have been defined) and 'Visualforce Tabs' (No Visualforce Tabs have been defined). At the bottom is a section for 'Lightning Component Tabs' (No Lightning component tabs have been defined).

Action	Label	Tab Style	Description
Edit   Del	Appointments	Castle	
Edit   Del	Billing details and feedback	Chess piece	
Edit   Del	Customer Details	Rook	
Edit   Del	Service records	Camera	

## CREATING A REMAINIG TABS

Setup Home Object Manager ▾

Q tabs

User Interface

Rename Tabs and Labels

**Tabs**

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

SETUP Tabs

## Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

**Custom Object Tabs**

Action	Label	Tab Style	Description
Edit   Del	Appointments	Castle	
Edit   Del	Billing details and feedback	Chess piece	
Edit   Del	Customer Details	Saw	
Edit   Del	Service records	Camera	

**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.

Help for this Page 

Tab Style Selector				Create your own style			
Hide styles which are used on other tabs							
Airplane	Alarm clock	Apple	Balls	Bank	Bell	Big top	Boat
Books	Bottle	Box	Bridge	Building	Building Block	Caduceus	Camera[1]
Can	Car	Castle[1]	CD/DVD	Cell phone	Chalkboard	Chess piece[1]	Chip
Circle	Compass	Computer	Credit card	CRT TV	Cup	Desk	Diamond
Dice	Factory	Fan	Flag	Form	Gears	Globe	Guitar
Hammer	Hands	Handsaw	Headset	Heart	Helicopter	Hexagon	Highway Sign
Hot Air Balloon	Inset	IP Phone	Jewel	Keys	Laptop	Leaf	Lightning
Locked	Mail	Map	Measuring Tape	Microphone	Moon	Motorcycle	Musical Note
PDA	Pencil	People	Phone	Postage	Presenter	Radar dish	Real Estate Sign
Red Cross	Sack	Safe	Sailboat	Saxophone	Scales	Shield	Ship
Shopping Cart	Square	Stack of Cash	Star[1]	Stethoscope	Stopwatch	Street Sign	Sun
Telescope	Thermometer	Ticket	Train	Treasure chest	Triangle	Trophy	Truck
TV Widescreen	Umbrella	Whistle	Wrench				

## THE LIGHTNING APP

### CREATING A LIGHTNING APP

Lightning Experience App Manager						
27 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type, App Type						
	App Name ↑	Developer Name	Description	Last Mo		
1	All Tabs	AllTabSet		9/5/2025		
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	9/5/2025		
3	App Launcher	AppLauncher	App Launcher tabs	9/5/2025		
4	Approvals	Approvals	Manage approvals and approval flows	9/5/2025		
5	Automation	FlowsApp	Automate business processes and repetitive tasks.	9/5/2025		
6	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	9/5/2025		
7	Community	Community	Salesforce CRM Communities	9/5/2025		
8	Content	Content	Salesforce CRM Content	9/5/2025		
9	Data Cloud	Audience360	Build a thorough and complete understanding of your customers.	9/5/2025		
10	Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	9/5/2025		
11	Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	9/5/2025		
12	Garage Management Application	Garage_Management_Application		9/9/2025		
13	Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	9/5/2025		
14	Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	9/5/2025		
15	My Service Journey	MSJApp	Discover new customer service capabilities.	9/5/2025		
16	Platform	Platform	The fundamental Lightning Platform	9/5/2025		
17	Quality Management	QualityManagement	Create and manage quality documents and audits.	9/5/2025		

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.

<b>App Details</b>	<b>App Branding</b>
<p>*App Name <small>(Required)</small></p> <input type="text" value="Name your app..."/> <p>*Developer Name <small>(Required)</small></p> <input type="text" value="Enter a developer name..."/> <p>Description <small>(Optional)</small></p> <input type="text" value="Enter a description..."/>	<p>Image <small>(Optional)</small></p> <input type="file" value="Upload"/> <p>Primary Color Hex Value <small>(Optional)</small></p> <input type="color" value="#0070D2"/> #0070D2
<p>Org Theme Options</p> <input type="checkbox"/> Use the app's image and color instead of the org's custom theme	
<p>App Launcher Preview</p>	
<p>Next <small>(1 step)</small></p>	

Lightning Bolt Solutions

14	Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	9/5/2025, 10:20 A...	Classic	<input checked="" type="checkbox"/>
15	My Service Journey	MSJApp	Discover new customer service capabilities.	9/5/2025, 10:20 A...	Lightning	<input checked="" type="checkbox"/>
16	Platform	Platform	The fundamental Lightning Platform	9/5/2025, 10:20 A...	Classic	<input checked="" type="checkbox"/>

Lightning App Builder | App Settings | Pages | Garage Management Application | ? Help

App Details & Branding

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: Garage Management Application

\* Developer Name: Garage\_Management\_Application

Description: Enter a description...

App Branding

Image:  Primary Color Hex Value: #0070D2

Org Theme Options:  Use the app's image and color instead of the org's custom theme

App Launcher Preview

GM Garage Management Appl...



**App Settings**

App Details &amp; Branding

App Options

Utility Items (Desktop Only)

**Navigation Items**

User Profiles

**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**

<input type="button" value="C"/> Create <span>▼</span>
<input type="text"/> Type to filter list...
 Accounts
 Activation Targets
 Activations
 All Sites
 Alternative Payment Methods
 Analytics
 App Launcher
 Appointment Categories
 Appointment Invitations
 Approval Requests
 Approval Submission Details
 Approval Submissions

**Selected Items**

 Customer Details
 Appointments
 Service records
 Billing details and feedback
 Reports
 Dashboards

## App Settings

App Details & Branding

### App Options

Utility Items (Desktop Only)

Navigation Items

User Profiles

## App Options

### Navigation and Form Factor

#### \*Navigation Style

Standard navigation

Console navigation

#### \*Supported Form Factors

Desktop and phone

Desktop

Phone

### Setup and Personalization

#### Setup Experience

Setup (full set of Setup options)

Service Setup

Data Cloud Setup

#### App Personalization Settings

Disable end user personalization of nav items in this app

Disable temporary tabs for items outside of this app

Use Omni-Channel sidebar

## CREATION OF FIELDS FOR THE CUSTOMER DETAILS OBJECT

The screenshot shows the Salesforce Object Manager interface. The left sidebar is titled 'Customer Details' and contains the following navigation items:

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

The main content area is titled 'Details' and displays the following configuration:

Description	Enable Reports
API Name Customer_Details__c	✓
Custom	✓
Singular Label Customer Details	✓
Plural Label Customer Details	✓
Track Activities	
Track Field History	✓
Deployment Status Deployed	
Help Settings	
Standard salesforce.com Help Window	

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

The screenshot shows the 'Fields & Relationships' tab for the Customer Details object. The left sidebar is identical to the previous screenshot. The main content area is titled 'Fields & Relationships' and lists the following fields:

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		

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

The screenshot shows the Salesforce Object Manager page. The URL in the browser is `orgfarm-f98201a926-dev-ed.lightning.force.com/lightning/setup/ObjectManager/home`. The page title is "Object Manager". The search bar contains "cus". There are buttons for "Schema Builder" and "Create". The table lists three objects:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Custom Library	DataMaskCustomValueLibrary	Standard Object			
Customer	Customer	Standard Object			
Customer Details	Customer_Details__c	Custom Object		9/9/2025	✓

## CREATION OF LOOKUP

orgfarm-f98201a926-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgL00000255s9/FieldsAndRelationships/new

Setup Home Object Manager

SETUP > OBJECT MANAGER  
Appointment

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

Appointment New Custom Field

Step 1. Choose the field type

Specify the type of information that the custom field will contain.

Data Type

None Selected Select one of the data types below.

Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

Roll-Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

Master-Detail Relationship The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

External Lookup Relationship Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Checkbox Allows users to select a True (checked) or False (unchecked) value.

Help for this Page

orgfarm-f98201a926-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgL00000255s9/FieldsAndRelationships/00NgL00001YSQRh/view

Setup Home Object Manager

SETUP > OBJECT MANAGER  
Appointment

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

Appointment Custom Field  
Appointment Date

Back to Appointment Validation Rules Help

Custom Field Definition Detail

Field Information

Field Label	Appointment Date	Object Name	Appointment
Field Name	Appointment_Date	Data Type	Date
API Name	Appointment_Date_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Sobika P 9/9/2025, 10:26 PM	Modified By	Sobika P 9/9/2025, 10:26 PM

General Options

Required

Default Value

Validation Rules

No validation rules defined.

New

Validation Rules Help

^ Back To Top Always show me ▾ more records per related list

## CREATION OF CHECKBOX

The screenshot shows the Salesforce Object Manager interface. The left sidebar lists various setup categories like Page Layouts, Lightning Record Pages, and Field Sets. The main content area is titled 'Fields & Relationships' for the 'Appointment' object. It displays a table with 12 items, sorted by Field Label. The columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. Key fields shown include 'Appointment Date' (Date), 'Appointment Name' (Name), 'Created By' (Lookup(User)), 'Customer Details' (Lookup(Customer Details)), 'Last Modified By' (Lookup(User)), 'Maintenance service' (Checkbox), 'Owner' (Lookup(User,Group)), 'Payment Paid' (Currency(18, 0)), 'Repairs' (Checkbox), 'Replacements Parts' (Checkbox), and 'Service Amount' (Currency(18, 0)).

The screenshot shows the 'Custom Field Definition Detail' for the 'Maintenance service' field of the Appointment object. The top navigation bar includes links for 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Field Information' section shows the field label 'Maintenance service', field name 'Maintenance\_service', API name 'Maintenance\_service\_c', data type 'Checkbox', and object name 'Appointment'. The 'General Options' section shows the default value as 'Unchecked'. The 'Field Dependencies' and 'Validation Rules' sections are currently empty.

## CREATION OF DATE FIELDS

The screenshot shows the Salesforce Setup interface for creating a custom field. The URL is <https://orgfarm-f98201a926-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgL000002SSs9/FieldsAndRelationships/00NgL00001YSQRh/view>. The page title is "Appointment". The left sidebar shows "Fields & Relationships" selected. The main content area displays the "Custom Field Definition Detail" for the "Appointment Date" field. The field label is "Appointment Date", and the API name is "Appointment\_Date\_\_c". The object name is "Appointment" and the data type is "Date". The field is marked as required. There are no validation rules defined.

## CREATION OF CURRENCY FIELDS

orgfarm-f98201a926-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgL00000255s9/FieldsAndRelationships/00NgL00001YSHQ/view

Setup Home Object Manager

SETUP > OBJECT MANAGER  
**Appointment**

Vehicle number plate

Custom Field Definition Detail

Field Information

Field Label	Vehicle number plate	Object Name	Appointment
Field Name	Vehicle_number_plate	Data Type	Text
API Name	Vehicle_number_plate_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Sobika P. 9/9/2025, 10:28 PM	Modified By	Sobika P. 9/9/2025, 10:48 PM

General Options

Required	<input checked="" type="checkbox"/>
Unique	<input checked="" type="checkbox"/>
Case Sensitive	<input type="checkbox"/>
External ID	<input type="checkbox"/>
Default Value	

Text Options

## CREATION OF TEXT FIELDS

orgfarm-f98201a926-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgL00000255wz/FieldsAndRelationships/00NgL00001YSDW/view

Setup Home Object Manager

SETUP > OBJECT MANAGER  
**Service records**

Payment Service

Custom Field Definition Detail

Field Information

Field Label	Payment Service	Object Name	Service records
Field Name	Payment_Service	Data Type	Picklist
API Name	Payment_Service_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Sobika P. 9/9/2025, 10:33 PM	Modified By	Sobika P. 9/9/2025, 10:33 PM

General Options

Required	<input type="checkbox"/>
Default Value	<input type="checkbox"/>

Picklist Options

Restrict picklist to the values defined in the value set	<input checked="" type="checkbox"/>
Controlling Field	[None]

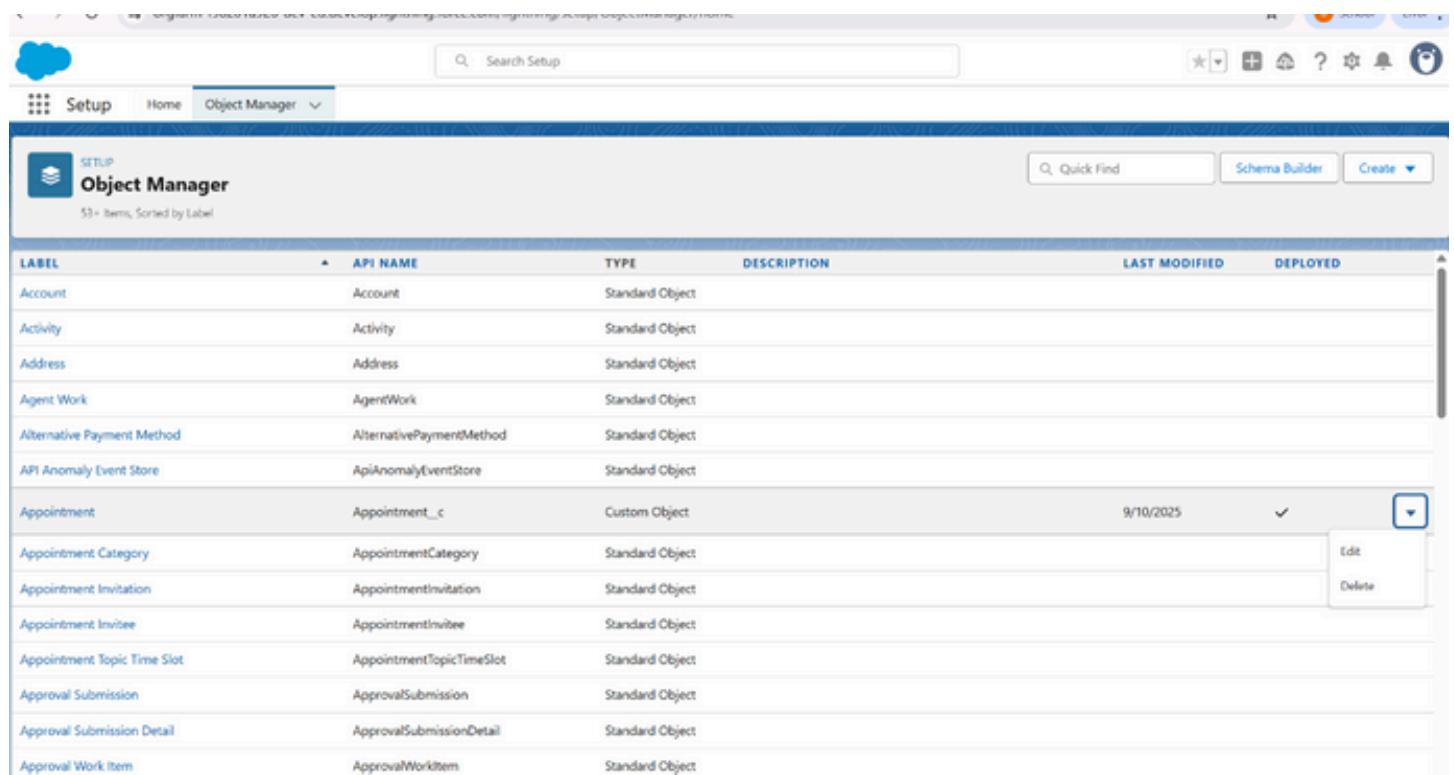
Picklist Values Used

## CREATION OF FORMULA FIELD

The screenshot shows the Salesforce Setup interface for creating a custom field. The top navigation bar includes links for Home, Object Manager, and a search bar. The main title is "SETUP > OBJECT MANAGER" followed by "Service records". On the left, a sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The "Fields & Relationships" category is currently selected. The main content area displays the "Custom Field Definition Detail" for a field named "service date". The "Field Information" section shows details such as Field Label: "service date", Field Name: "service\_date", API Name: "service\_date\_c", and Object Name: "Service records". The "Formula Options" section indicates the Data Type is "Formula" and the formula is "CreatedDate". The page also includes standard Salesforce navigation icons at the top right.

## VALIDATION RULES

### TO CREATE A VALIDATION RULE TO APPOINTMENT OBJECT



The screenshot shows the Salesforce Object Manager page. At the top, there are navigation links for Setup, Home, and Object Manager. The main title is "Object Manager" with a subtitle "53+ items, Sorted by Label". Below the title, there are search and filter fields: "Search Setup" and "Q, Quick Find", along with buttons for "Schema Builder" and "Create". The main content is a table listing various objects:

Label	API Name	Type	Description	Last Modified	Deployed
Account	Account	Standard Object			
Activity	Activity	Standard Object			
Address	Address	Standard Object			
Agent Work	AgentWork	Standard Object			
Alternative Payment Method	AlternativePaymentMethod	Standard Object			
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object			
Appointment	Appointment_c	Custom Object		9/10/2025	✓
Appointment Category	AppointmentCategory	Standard Object			<input type="button" value="Edit"/>
Appointment Invitation	AppointmentInvitation	Standard Object			<input type="button" value="Delete"/>
Appointment Invitee	AppointmentInvitee	Standard Object			
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object			
Approval Submission	ApprovalSubmission	Standard Object			
Approval Submission Detail	ApprovalSubmissionDetail	Standard Object			
Approval Work Item	ApprovalWorkItem	Standard Object			

Setup > Object Manager

## Appointment

Details
Edit Custom Object Appointment
Help for this Page ?

**Custom Object Definition Edit**

**Custom Object Information**

The singular and plural labels are used in tabs, page layouts, and reports.  
Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label:	<input type="text" value="Appointment"/>	Example: Account
Plural Label:	<input type="text" value="Appointments"/>	Example: Accounts
<input type="checkbox"/> Starts with vowel sound		

The Object Name is used when referencing the object via the API.

Object Name:	<input type="text" value="Appointment"/>	Example: Account
--------------	--	------------------

Description:

Context-Sensitive Help Setting:

<input checked="" type="radio"/> Open the standard Salesforce.com Help & Training window
<input type="radio"/> Open a window using a Visualforce page

Content Name:

None

**Enter Record Name Label and Format**

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name:	<input type="text" value="Appointment Name"/>	Example: Account Name
--------------	---	-----------------------

Setup > Object Manager

## Appointment

Details
Fields & Relationships
Quick

**Fields & Relationships**  
12 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE
Appointment Date	Appointment_Date__c	Date
Appointment Name	Name	Auto Number
Created By	CreatedBy	Lookup(User)
Customer Details	Customer_Details__c	Lookup(Customer Details)
Last Modified By	LastModifiedBy	Lookup(User)

## TO CREATE A VALIDATION RULE TO BILLING DETAILS AND FEEDBACK OBJECT

Screenshot of the Salesforce Object Manager page showing a list of objects:

Object Name	Type	Created Date	Action Buttons
Assigned Resource	Standard Object		
Associated Location	Standard Object		
Authorization Form	Standard Object		
Authorization Form Consent	Standard Object		
Authorization Form Data Use	Standard Object		
Authorization Form Text	Standard Object		
Billing details and feedback	Custom Object	9/9/2025	<a href="#">Edit</a> <a href="#">Delete</a>
Business Brand	Standard Object		
Buyer Group	Standard Object		
Campaign	Standard Object		
Campaign Member	Standard Object		
Card Payment Method	Standard Object		
Cart	Standard Object		
Cart Adjustment Basis	Standard Object		
Cart Adjustment Details	Standard Object		

Screenshot of the 'Billing details and feedback' object definition edit screen:

**Custom Object Definition Edit**

**Custom Object Information**

The singular and plural labels are used in tabs, page layouts, and reports.  
Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label	<input type="text" value="Billing details and feedback"/>	Example: Account
Plural Label	<input type="text" value="Billing details and feedback"/>	Example: Accounts
Starts with vowel sound	<input type="checkbox"/>	

The Object Name is used when referencing the object via the API.

Object Name	<input type="text" value="Billing_details_and_feedback"/>	Example: Account
-------------	---	------------------

Description

Context-Sensitive Help Setting

<input checked="" type="radio"/> Open the standard Salesforce.com Help & Training window
<input type="radio"/> Open a window using a Visualforce page

Content Name

Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name	<input type="text" value="Billing details and feedback"/>	Example: Account Name
-------------	---	-----------------------

Setup Home Object Manager

## Billing details and feedback

Details Fields & Relationships Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts Field Sets Object Limits Record Types Related Lookup Filters Search Layouts List View Button Layout

**Fields & Relationships**  
7 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE
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 Status	Payment_Status__c	Picklist
Rating for service	Rating_for_service__c	Text(1)
Service records	Service_records__c	Lookup(Service records)

Setup Home Object Manager

## Billing details and feedback

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

**Fields & Relationships**  
7 Items, Sorted by Field Label

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 Status	Payment_Status__c	Picklist		▼
Rating for service	Rating_for_service__c	Text(1)		▼
Service records	Service_records__c	Lookup(Service records)		▼

Screenshot copied to clipboard  
Automatically saved to screenshots folder.

Mark-up and share

orgfarm-f98201a926-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgL0000025T3R/FieldsAndRelationships/page?address=%2Fp%2Fsetup%2Fcustent%2F...

Setup Home Object Manager

SETUP > OBJECT MANAGER

## Billing details and feedback

Details

**Fields & Relationships**

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

Field Billing details and feedback name

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name: Billing details and feedback  
Example: Account Name

Data Type: Auto Number  
Display Format: Bill-(000)  
Example: A-(000) Ybill000

Save Cancel

Recent Accounts

Account Name	City
Acme	New York
Global Media	Toronto
naforce.com	San Francisco

## DUPLICATE RULE

TO CREATE MATCHING RULE TO CUSTOMER DETAILS OBJECT

orgfarm-f98201a926-dev-ed.lightning.force.com/lightning/setup/SetupOneHome/home

The screenshot shows the Salesforce Setup Home page. A search bar at the top left contains the query "match". On the left sidebar, under the "Data" section, "Matching Rules" is selected. A message below says "Didn't find what you're looking for? Try using Global Search." The main content area features three cards: "Data Cloud" (Setup), "Get Started with Einstein Bots" (Setup), and "Mobile Publisher" (Setup). Below these is a section titled "Most Recently Used" with a table showing four items: Service Status (Custom Field Definition, Service records), service date (Custom Field Definition, Service records), Payment Service (Custom Field Definition, Service records), and Vehicle number plate (Custom Field Definition, Appointment).

orgfarm-f98201a926-dev-ed.lightning.force.com/lightning/setup/MatchingRules/home

The screenshot shows the Salesforce Matching Rules page. A search bar at the top left contains the query "match". On the left sidebar, "Matching Rules" is selected. A message below says "Didn't find what you're looking for? Try using Global Search." The main content area is titled "All Matching Rules" and includes a "What Are Matching Rules?" section with a link to "[Expand]". Below is a table listing matching rules:

Action	Rule Name	Object	Status	Description	Last Modified Date	Last Modified By
Del   Deactivate	Matching customer details	Customer Details	Active	Matching rule for account records. <a href="#">More info</a>	9/9/2025	SOB
Deactivate	Standard Account Matching Rule	Account	Active	Matching rule for contact records. <a href="#">More info</a>	9/9/2025	DEPBC
Deactivate	Standard Contact Matching Rule	Contact	Active	Matching rule for lead records. <a href="#">More info</a>	9/9/2025	DEPBC
Deactivate	Standard Lead Matching Rule	Lead	Active	Matching rule for lead records. <a href="#">More info</a>	9/9/2025	DEPBC

The screenshot shows the Salesforce Setup interface. On the left, there's a sidebar with a search bar and sections for Data, Duplicate Management, and Matching Rules. The Matching Rules section is currently selected. The main area displays a Matching Rule named "Matching customer details". The rule details are as follows:

Object	Customer Details
Rule Name	Matching customer details
Unique Name	Matching_customer_details
Description	
Matching Criteria	{customer.details: email exact MatchBlank = FALSE} AND {customer.details: phone_number exact MatchBlank = FALSE}
Status	Active
Created By	Sobika.P. 9/9/2025, 10:54 PM
Modified By	Sobika.P. 9/9/2025, 10:54 PM

At the top right of the main area, there are buttons for Delete, Clone, and Deactivate.

## TO CREATE A DUPLICATE RULE TO CUSTOMER DETAILS OBJECT

The screenshot shows the Salesforce Setup interface with the Profiles page open. The left sidebar includes sections for Hyperforce Assistant, Users, Data (with Mass Transfer Approval Requests), Feature Settings (Approval Settings), Data.com (Prospector Preferences, Prospector Users), Functions, Marketing (Lead Processes), Sales, and Products (Asset Settings, Product Schedules, Settings, Product Settings). The Profiles section is currently selected. The main area displays a list of profiles:

Action	Profile Name	User License	Custom
<input type="checkbox"/>	Analytics Cloud Integration User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/>	Analytics Cloud Security User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/>	Advanced Integration	Identity	<input type="checkbox"/>
<input type="checkbox"/>	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/>	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/>	External Apps Login	External Apps Login	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Chatter External	Chatter External	<input type="checkbox"/>
<input type="checkbox"/>	Chatter Free	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/>	Chatter Moderator User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/>	Contact Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/>	Cross.Org Data Privacy User	XOrg Proxy User	<input type="checkbox"/>
<input type="checkbox"/>	Custom: Marketing Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Custom: Sales Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Custom: Support Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Customer Community Login User	Customer Community Login	<input type="checkbox"/>
<input type="checkbox"/>	Customer Community Plus Login User	Customer Community Plus Login	<input type="checkbox"/>
<input type="checkbox"/>	Customer Community Plus User	Customer Community Plus	<input type="checkbox"/>
<input type="checkbox"/>	Customer Community Plus User	Customer Community Plus	<input type="checkbox"/>

At the bottom of the list, there are navigation buttons for Page, Previous, Next, and Last.

Profile Standard User

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.

Log In [Manage] | Enabled Access Class Access | Enabled Visualforce Page Access | Enabled External Data Source Access | Enabled Named Credential Access | Enabled External Credential Principal Access | Enabled Custom Metadata Type Access | Enabled Custom Setting Definitions Access | Enabled Flow Access | Enabled Service Presence Status Access | Enabled Custom Permissions

**Profile Detail**

Name	Standard User	Custom Profile
User License	Salesforce	
Created By	salesforce.com, inc., 9/5/2025, 10:20 AM	Modified By Sobika P, 9/10/2025, 9:53 PM

**Page Layouts**

Standard Object Layouts	Global	Location Group Assignment	Location Group Assignment Layout
Email Application	Not Assigned		[View Assignment]
Home Page Layout	Home Page Default		[View Assignment]
Account	Account Layout		[View Assignment]
Alternative Payment Method	Alternative Payment Method Layout		[View Assignment]
Appointment Invitation	Appointment Invitation Layout		[View Assignment]
Asset	Asset Layout		[View Assignment]
Asset Action	Asset Action Layout		[View Assignment]

Macro Layout [View Assignment]

Object Milestone Layout [View Assignment]

Operating Hours Layout [View Assignment]

Opportunity Opportunity Layout [View Assignment]

Opportunity Product Layout [View Assignment]

Order Order Layout [View Assignment]

Order Product Order Product Layout [View Assignment]

Profile Standard Platform User

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.

Log In [Manage] | Enabled Access Class Access | Enabled Visualforce Page Access | Enabled External Data Source Access | Enabled Named Credential Access | Enabled External Credential Principal Access | Enabled Custom Metadata Type Access | Enabled Custom Setting Definitions Access | Enabled Flow Access | Enabled Service Presence Status Access | Enabled Custom Permissions

**Profile Detail**

Name	Standard Platform User	Custom Profile
User License	Salesforce Platform	
Created By	salesforce.com, inc., 9/5/2025, 10:20 AM	Modified By Sobika P, 9/10/2025, 9:53 PM

**Page Layouts**

Standard Object Layouts	Global	Lead	Lead Layout
Email Application	Not Assigned		[View Assignment]
Home Page Layout	Home Page Default		[View Assignment]
Account	Account Layout		[View Assignment]
Alternative Payment Method	Alternative Payment Method Layout		[View Assignment]
Appointment Invitation	Appointment Invitation Layout		[View Assignment]
Asset	Asset Layout		[View Assignment]
Asset Relationship	Asset Relationship Layout		[View Assignment]

Location Location Layout [View Assignment]

Location Group Location Group Layout [View Assignment]

Location Group Assignment Location Group Assignment Layout [View Assignment]

Object Milestone Object Milestone Layout [View Assignment]

Operating Hours Operating Hours Layout [View Assignment]

Order Order Layout [View Assignment]

Order Product Order Product Layout [View Assignment]

## PROFILE

### PROFILE MANAGER

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

- Header:** Includes a cloud icon, "Setup", "Home", "Object Manager", and a search bar labeled "Search Setup".
- Left Navigation Bar:** Shows a tree structure of settings:
  - Hyperforce Assistant
  - Users
    - Profiles (selected)
    - Data
    - Feature Settings
      - Approval Settings
    - Data.com
      - Prospector Preferences
      - Prospector Users
      - Functions
    - Marketing
      - Lead Processes
    - Sales
    - Products
      - Asset Settings
      - Product Schedules
      - Settings
      - Product Settings
- Current Page:** "Profiles" under the "SETUP" tab.
- Content Area:** "Profiles" table view.
  - Table Headers:** Action, Profile Name, User License, Custom.
  - Table Data:** A list of profiles with their names and user licenses. Some profiles have checkboxes next to them, and some have checkmarks in the "Custom" column.
  - Table Footer:** "1-45 of 45" and "0 Selected".
  - Page Number:** "Page 1 of 1".

The screenshot shows the Salesforce Setup interface. The left sidebar is titled 'Setup' and includes sections for 'User Assistant', 'Users', 'Data', 'Feature Settings', 'Approval Settings', 'Data.com', 'Prospector Preferences', 'Prospector Users', 'Functions', 'Marketing', 'Lead Processes', 'Sales', 'Products', 'Asset Settings', 'Product Schedules Settings', and 'Product Settings'. The 'Profiles' section under 'Feature Settings' is currently selected and highlighted in yellow. The main content area is titled 'SETUP Profiles' and shows the 'Standard User' profile. It includes a 'Profile Detail' section with fields for 'Name' (Standard User), 'User License' (Salesforce), 'Created By' (salesforce.com, inc.), and 'Modified By' (Sobika\_P). Below this is a 'Page Layouts' section for 'Standard Object Layouts'.

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

## SALES PERSON PROFILE

The screenshot shows the Salesforce Setup interface. The left sidebar is titled 'Q\_pro' and includes sections for 'User Assistant', 'Users' (selected), 'Profiles' (highlighted in yellow), 'Data', 'Feature Settings', 'Approval Settings', 'Data.com', 'Prospector Preferences', 'Prospector Users', 'Functions', 'Marketing', 'Lead Processes', 'Sales', 'Products' (selected), 'Asset Settings', 'Product Schedules', 'Settings', and 'Product Settings'. The main content area is titled 'Profiles' and shows the 'Standard Platform User' profile. It includes fields for 'Name' (Standard Platform User), 'User License' (Salesforce Platform), 'Custom Profile' (unchecked), 'Created By' (salesforce.com, inc., 9/5/2025, 10:20 AM), and 'Modified By' (Sobika D, 9/10/2025, 9:53 PM). The 'Page Layouts' section lists various layouts for different objects like Global, Email Application, Home Page Layout, Account, Alternative Payment Method Layout, Appointment Invitation, Asset, and Asset Relationship. Each layout entry includes a 'View Assignment' link.

## ROLES AND ROLE HIERARCHY

orgfarm-f98201a926-dev-ed.lightning.force.com/lightning/setup/Roles/home

Setup Home Object Manager

roles

Users Roles

Feature Settings Sales Contact Roles on Contracts Contact Roles on Opportunities Service Case Teams Case Team Roles Contact Roles on Cases

Didnt find what you're looking for? Try using Global Search.

### Understanding Roles

Set up your Role Hierarchy to control how your organization reports on and accesses data.

Sample Role Hierarchy

View other sample Role Hierarchies: Territory-based Sample

Executive Staff  
CEO - President CFO - VP, Sales

Western Sales Director  
Director of W. Sales

Eastern Sales Director  
Director of E. Sales

International Sales Director  
Director of Int'l Sales

Western Sales Rep CA Sales Rep OR Sales Rep

Eastern Sales Rep NY Sales Rep MA Sales Rep

International Sales Rep Asian Sales Rep European Sales Rep

\* View & edit data, roll up forecasts, & generate reports for all users below \* Can't access data of other Executive Staff

\* View & edit data, roll up forecasts, & generate reports for all users directly below \* Can't access data of users above or at same level

\* View & edit data, roll up forecasts, & generate reports only for own data \* Can't access data of users above or at same level

Set Up Roles

Don't show this page again

orgfarm-f98201a926-dev-ed.lightning.force.com/lightning/setup/Roles/home

Setup Home Object Manager

roles

Users Roles

Feature Settings Sales Contact Roles on Contracts Contact Roles on Opportunities Service Case Teams Case Team Roles Contact Roles on Cases

Didnt find what you're looking for? Try using Global Search.

### Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click Add Role.

Your Organization's Role Hierarchy

Collapse All Expand All

VET Institute of arts and science

- + Add.Role
- + CEO Edit | Del | Assign
- + Add.Role

## CREATING ANOTHER ROLES

The screenshot shows the Salesforce Setup Roles page. The left sidebar includes links for Home, Object Manager, and a search bar labeled "Search Setup". The main content area is titled "Roles" and displays the "Creating the Role Hierarchy" section. It states, "You can build on the existing role hierarchy shown on this page. To insert a new role, click Add Role." Below this is a tree view titled "Your Organization's Role Hierarchy". The hierarchy starts with "VET Institute of arts and science", which has several child roles: "CEO", "COO", "Manager", "sales.person", "SVP, Customer Service & Support", "Customer Support, International", "Customer Support, North America", "Installation & Repair Services", "SVP, Human Resources", and "EVP Sales & Marketing". Each role entry includes "Edit | Del | Assign" buttons. A "Help for this Page" link is located in the top right corner of the main content area.

## USER

### CREATE A USER

orgfarm-f98201a926-dev-ed.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005g!000007VQIN%3FnoRedirect%3D1%26isUserEntityOverride%3D1

Setup Home Object Manager

Q users

**SETUP** Users

User Niklaus Mikaelson

Permission Set Assignments (0) | Permission Set Assignments Activation Required (0) | Permission Set Group Assignments (0) | Permission Set License Assignments (0) | Personal Groups (0) | Public Groups Membership (0) | Queue Membership (0) | Team (0) | Managers in the Role Hierarchy (0) | OAuth Apps (0) | Third Party Account Links (0) | Built-in Authenticators (0) | Installed Mobile Apps (0) | Authentication Settings for External Systems (0) | Login History (1) | User Provisioning Accounts (0)

**User Detail**

Name	Niklaus Mikaelson	Role	Manager
Alias	nmika	User License	Salesforce
Email	sobikaprabakar23asd@vetas.ac.in [Verified]	Profile	Manager
Username	sobikaprabakar23asd@vetas.ac.in	Active	<input checked="" type="checkbox"/>
Nickname	User175748462990703389405	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 checked="" type="checkbox"/>
Delegated Approver		Data.com User Type	<input checked="" type="checkbox"/>
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/>
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/>
App Registration: One-Time Password Authenticator		Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>
App Registration: Salesforce Authenticator		Salesforce CRM Content User	<input checked="" type="checkbox"/>

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

orgfarm-f98201a926-dev-ed.lightning.force.com/lightning/setup/ManageUsers/home

Setup Home Object Manager

Q users

**SETUP** Users

All Users

Help for this Page

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app. Let's Go

View: All Users | Edit | Create New User

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> <a href="#">Edit</a>	Stuck Sam	stuck	sambalck@gmail.com	salesperson	<input checked="" type="checkbox"/>	Sales person
<input type="checkbox"/> <a href="#">Edit</a>	Chatter Expert	Chatter	chatty.00000000000000000000000000000000@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> <a href="#">Edit</a>	Click_Itza	itzaz	itzazclick@gmail.com	salesperson	<input checked="" type="checkbox"/>	Sales person
<input type="checkbox"/> <a href="#">Edit</a>	EDG_Oncore	DEG	edc4300ebe1de72@oncore.salesforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> <a href="#">Edit</a>	Mikaelson_Niklaus	nmika	sobikaprabakar23asd@vetas.ac.in	Manager	<input checked="" type="checkbox"/>	Manager
<input type="checkbox"/> <a href="#">Edit</a>	P_Sobika	sob	sobikaprabakar23asd@vetas.ac.in		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> <a href="#">Edit</a>	User_Integration	intex	integration@003a00000env5uab.com		<input checked="" type="checkbox"/>	Analytics_Cloud_Integration_User
<input type="checkbox"/> <a href="#">Edit</a>	User_Security	sec	imranhussaini@003a00000env5uab.com		<input checked="" type="checkbox"/>	Analytics_Cloud_Security_User

New User | Reset Password(s) | Add Multiple Users

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other

← → ⌂ orgfarm-f98201a926-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005gL000007VQzt%3Fnoredirect%3D1%26isUserEntityOverride%3D1 School E

Setup Home Object Manager ▾

Q Search Setup

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

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

User Jhon clerk

Permission Set Assignments [0] | Permission Set Assignments Activation Required [0] | Permission Set Group Assignments [0] | Permission Set License Assignments [0] | Personal Groups [0] | Public Group Membership [0] | Queue Membership [0] | Team [0] | Managers in the Role Hierarchy [0] | OAuth Apps [0] | Thru Path Account Links [0] | Built-in Authenticators [0] | Installed Mobile Apps [0] | Authentication Settings for External Systems [0] | Login History [0] | User Provisioning Accounts [0]

User Detail

Name: Jhon clerk  
Alias: jcler  
Email: jhonclerk@gmail.com (Master)  
Username: jhonclerk@gmail.com  
Nickname: User1757484176866590818  
Title:  
Company:  
Department:  
Division:  
Address:  
Time Zone: (GMT-07:00) Pacific Daylight Time (America/Los\_Angeles)  
Locale: English (United States)  
Language: English  
Delegated Approver:  
Manager:  
Receive Approval Request Emails: Only if I am an approver  
Federation ID:  
App Registration: One-Time Password Authenticator  
App Registration: Salesforce Authenticator

Role: salesperson  
User License: Salesforce Platform  
Profile: Sales person  
Active:   
Marketing User:   
Offline User:   
Knowledge User:   
Flow User:   
Service Cloud User:   
Site.com Contributor User:   
Site.com Publisher User:   
WMC User:   
Mobile Push Registrations: View  
Data.com User Type:   
Accessibility Mode (Classic Only):  ⓘ  
Debug Mode:  ⓘ  
High-Contrast Palette on Charts:  ⓘ  
Load Lightning Pages While Scrolling:  ⓘ  
Salesforce CRM Content User:

PUBLIC GROUPS CREATING NEWPUBLIC GROUPING

orgfarm-f98201a926-dev-ed.lightning.force.com/lightning/setup/PublicGroups/home

Setup Home Object Manager

Search Setup

Users

Permission Set Groups

Permission Sets

Profiles

**Public Groups**

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector **Users**

Help for this Page

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Action	Label	Group Name	Created By	Created Date
Edit   Del	sales_team	sales_team	P. Sobika	9/9/2025, 11:30 PM

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

orgfarm-f98201a926-dev-ed.lightning.force.com/lightning/setup/PublicGroups/sales\_team

Setup Home Object Manager

Search Setup

Users

Permission Set Groups

Permission Sets

Profiles

**Public Groups**

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector **Users**

Help for this Page

Group sales team

Label	sales team	Edit   Delete   View Summary
Group Name	sales_team	
Grant Access Using Hierarchies	<input checked="" type="checkbox"/>	
Description		
Created By	Sobika,P. 9/9/2025, 11:30 PM	Modified By Sobika,P. 9/9/2025, 11:30 PM

**View All Users**

Name	Type
sales_person	Role

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

orgfarm-f98201a926-dev-ed.develop.lightning.force.com/lightning/setup/Roles/page?address=%2F00EgJ0000048TxF

School Error

Setup Home Object Manager

Search Setup

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

**Roles**

User Management Settings

Users

Feature Settings

Data.com

Prospector

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

Role sales person

Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.

Hierarchy: VET Institute of arts and science > CEO > Manager > sales person

Help for this Page

Role Detail

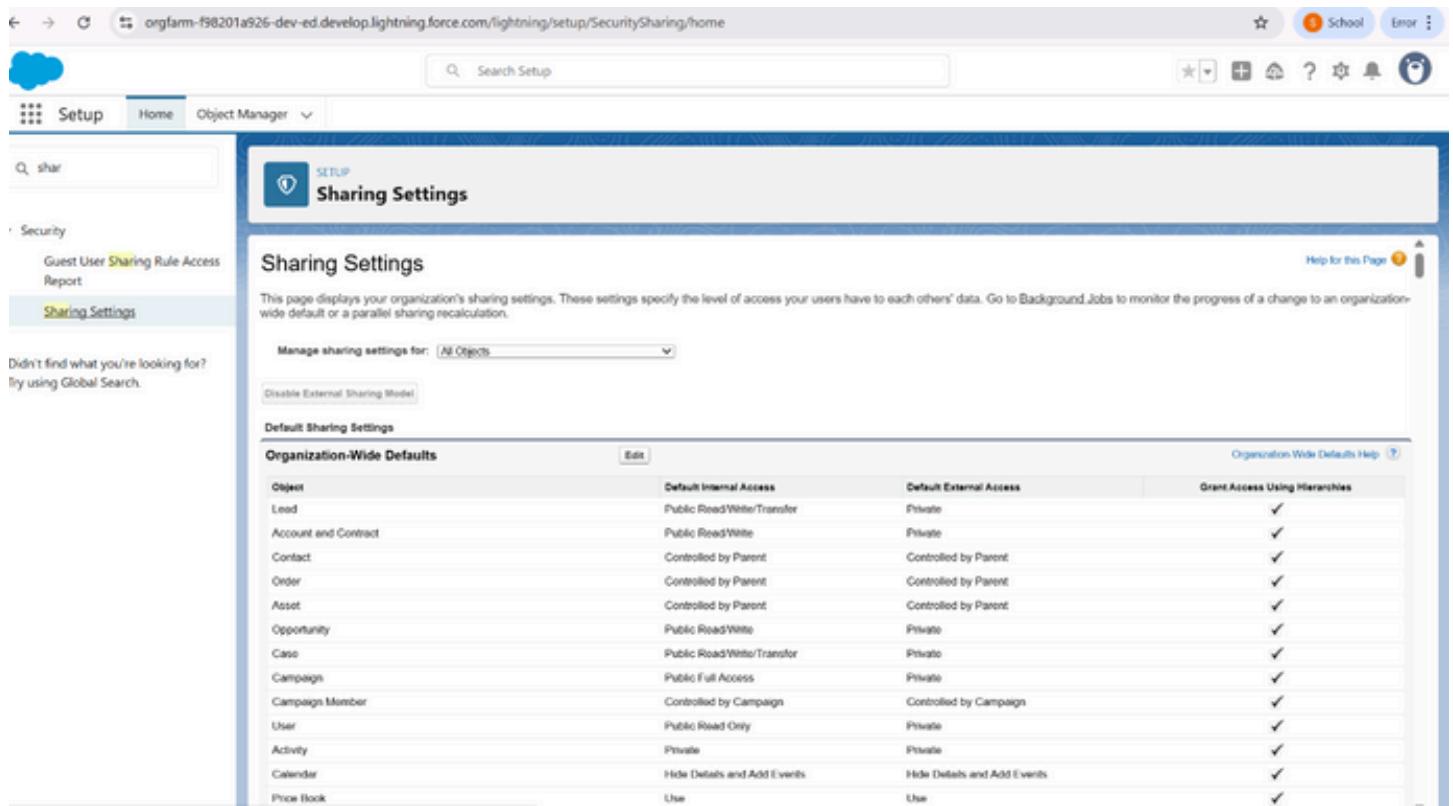
Label	sales person	Role Name	sales_person
This role reports to	Manager	Role Name as displayed on reports	
Modified By	Sobika P. 9/9/2025, 11:09 PM	Sharing Groups	Role, Role and Internal Subordinates
Opportunity Access	Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities.		
Case Access	Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases.		

Users in sales person Role

Action	Full Name	Alias	Username	Active
Edit	Jhon Clark	jclrk	jhonclrk@gmail.com	✓
Edit	sam.block	sblck	samblock@gmail.com	✓

## SHARING SETTINGS

### CREATING SHARING SETTINGS



The screenshot shows the Salesforce Sharing Settings page. At the top, there's a search bar labeled "Search Setup". Below it, a sidebar lists "Setup", "Home", and "Object Manager". Under "Security", there are links for "Guest User Sharing Rule Access Report" and "Sharing Settings", which is currently selected. A message at the bottom of the sidebar says, "Didn't find what you're looking for? Try using Global Search." The main content area is titled "Sharing Settings" and contains a sub-section "Default Sharing Settings". It features a table with columns: "Object", "Default Internal Access", "Default External Access", and "Grant Access Using Hierarchies". The table lists various objects like Lead, Account, Contact, etc., with their respective sharing rules.

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	✓
Account and Contract	Public Read/Write	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Public Read/Write	Private	✓
Case	Public Read/Write/Transfer	Private	✓
Campaign	Public Full Access	Private	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓
User	Public Read Only	Private	✓
Activity	Private	Private	✓
Calendar	Hide Details and Add Events	Hide Details and Add Events	✓
Price Book	Use	Use	✓

orgfarm-f98201a926-dev-ed.lightning.force.com/lightning/setup/SecuritySharing/home



Setup Home Object Manager

Search Setup

Sharing Settings

Image Private Private ✓

Incident Private Private ✓

Inventory Reservation Public Read/Write Private ✓

Invoice Public Read/Write Private ✓

Legal Entity Private Private ✓

List Email Private Private ✓

Location Public Read/Write Private ✓

Location Group Public Read/Write Private ✓

Location Shipping Carrier Method Public Read Only Private ✓

Macro Private Private ✓

Macro Usage Private Private ✓

Messaging Session Public Read/Write Private ✓

Messaging User Public Read/Write Private ✓

Model Private Private ✓

Operating Hours Public Read/Write Private ✓

Orchestration Run Private Private ✓

Orchestration Stage Run Private Private ✓

Orchestration Step Run Private Private ✓

Orchestration Work Item Private Private ✓

Party Consent Private Private ✓

Pending Service Routing Public Read Only Private ✓

Privacy RTBF Request Private Private ✓

Problem Private Private ✓

Process Exception Private Private ✓

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

## FLOW

### CREATING FLOW

orgfarm-f98201a926-dev-ed.lightning.force.com/lightning/setup/Flows/home

**Setup** Home Object Manager ▾

flows **SETUP** Flows

Flow Trigger Explorer New Flow

Process Automation

Flows

Identity

Login Flows

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

**All Flows**

50+ items • Sorted by Flow Label • Filtered by All flow definitions • Updated a few seconds ago

Flow Label	Process Type	Active	Tem...	Package State	Pack...	Last ...	Last Modified Date
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 details and feedback	Autolaunched Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Unmanaged	Sobika P	9/10/2025, 10:42 PM	
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			
Check Service Plan Eligibility	Autolaunched Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Close Change Request & Related Issues	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
CMS: Check Whether Any Step is Completed	Evaluation Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			

**Flow Builder**

Free-Form

Run Debug Save As New Version Save Activate

Toolbox

Elements Manager

### New Automation

Get Started with Automations

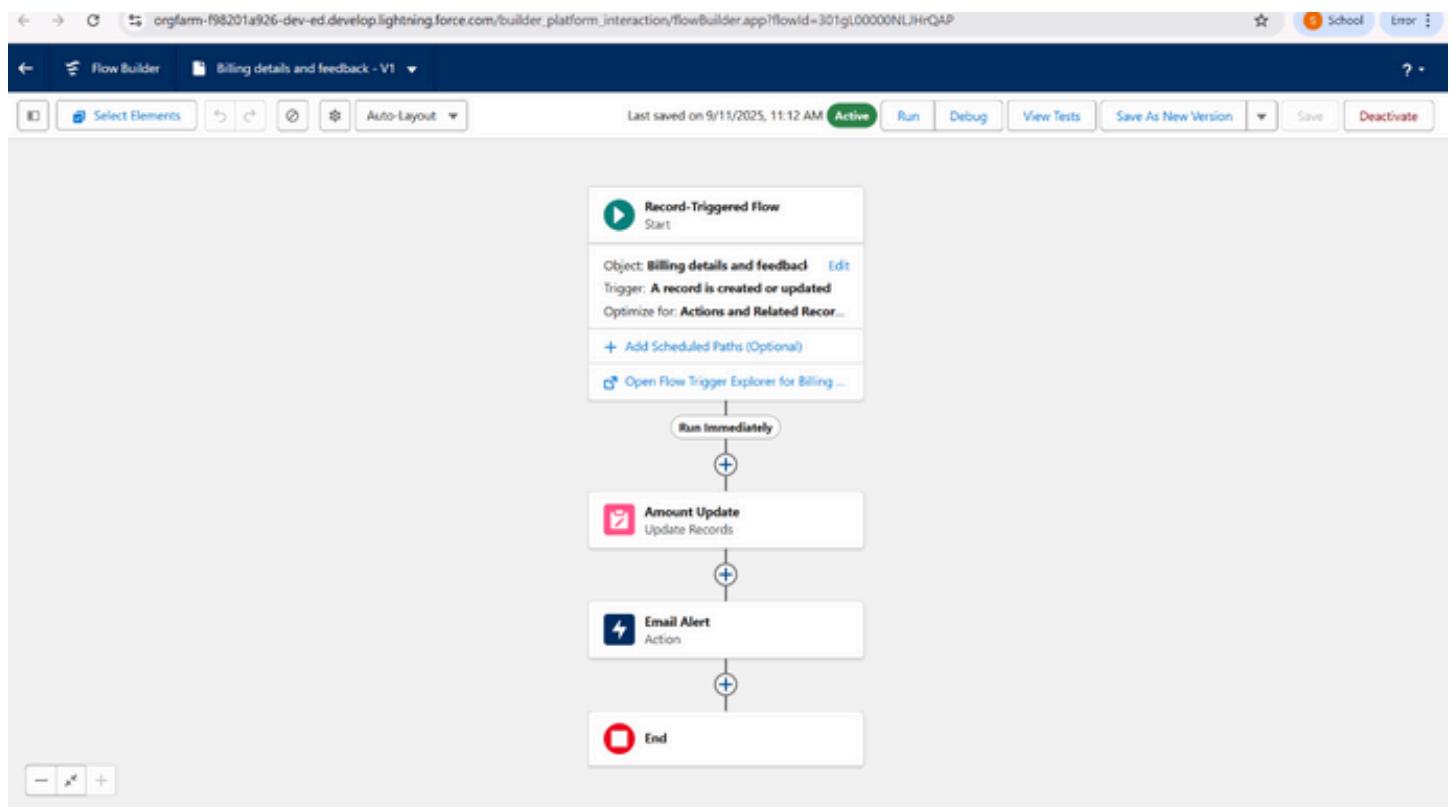
Select a category, flow type, use search, or let Einstein build an automation for you.

Categories

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

Frequently Used

- Record-Triggered Flow**  
Launches when a record is created, updated, or deleted. This autolaunched flow runs in the background.  
[View All >](#)
- Screen Flow**  
Guides users through a business process that's launched from Lightning pages, Experience Cloud sites, quick actions, an...  
[View All >](#)
- 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...



## CREATE ANOTHER FLOW

Flow Builder - Billing details and feedback - V1

Last saved on 9/11/2025, 11:12 AM Active Run Debug View Tests Save As New Version Save Deactivate

**Record-Triggered Flow**

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

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

Run Immediately

Amount Update

Email Alert

End

**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: A_a Completed
+ Add Condition		

Set Field Values for the Billing details and feedback Record

Field: Payment Status	Value: Search a field...
-----------------------	--------------------------

Flow Builder Billing details and feedback - V1

Last saved on 9/11/2025, 11:12 AM Active Run Debug View Tests Save As New Version Save Deactivate

Record-Triggered Flow Start

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

Run Immediately

Amount Update Update Records

Email Alert Action

End

Send Email

\* Label Email Alert

\* API Name Email\_Alert

Description

Use values from earlier in the flow to set the inputs for the "Send Email" core action. To use its outputs later in the flow, store them in variables.

Set Input Values

Configure Recipient Details

A3 Recipient Address List Email Alert

A3 Recipient Address Collection Enter value or search resources... Q

A3 CC Recipient Address List Enter value or search resources... Q

```
graph TD; Start((Start)) --> RunImmediately([Run Immediately]); RunImmediately --> AmountUpdate([Amount Update  
Update Records]); AmountUpdate --> EmailAlert([Email Alert  
Action]); EmailAlert --> End([End]);
```

## APPEX TRIGGERS

The screenshot shows the Salesforce IDE interface with the code editor open. The file is named `AmountDistributionHandler.apxc`. The code implements a class `AmountDistributionHandler` with a static method `amountDist` that takes a list of `Appointment__c` objects and calculates the `Service_Amount__c` based on various conditions involving `Maintenance_Service__c`, `Repairs__c`, and `Replacement_Parts__c`.

```
1 * public class AmountDistributionHandler {
2 *
3 *     public static void amountDist(list<Appointment__c> listApp){
4 *         list<Service_records__c> serlist = new list <Service_records__c>();
5 *
6 *         for(Appointment__c app : listApp){
7 *             if(app.Maintenance_service__c == true && app.Repairs__c == true && app.Replacement_Parts__c == true){
8 *                 app.Service_Amount__c = 10000;
9 *             }
10 *             else if(app.Maintenance_service__c == true && app.Repairs__c == true){
11 *                 app.Service_Amount__c = 5000;
12 *             }
13 *             else if(app.Maintenance_service__c == true && app.Replacement_Parts__c == true){
14 *                 app.Service_Amount__c = 8000;
15 *             }
16 *             else if(app.Repairs__c == true && app.Replacement_Parts__c == true){
17 *                 app.Service_Amount__c = 7000;
18 *             }
19 *             else if(app.Maintenance_service__c == true){
20 *                 app.Service_Amount__c = 2000;
21 *             }
22 *         }
23 *     }
24 *
25 *     else if(app.Maintenance_service__c == true && app.Replacement_Parts__c == true){
26 *         app.Service_Amount__c = 8000;
27 *     }
28 *
29 *     else if(app.Repairs__c == true && app.Replacement_Parts__c == true){
30 *         app.Service_Amount__c = 7000;
31 *     }
32 * }
33 }
```

The screenshot shows the Salesforce IDE interface with the code editor open. The file is named `AmountDistribution.apxc`. The code is identical to the one in the previous screenshot, implementing the `AmountDistributionHandler` class with the `amountDist` method.

```
12 *         }
13 *         else if(app.Maintenance_service__c == true && app.Replacement_Parts__c == true){
14 *             app.Service_Amount__c = 8000;
15 *         }
16 *         else if(app.Repairs__c == true && app.Replacement_Parts__c == true){
17 *             app.Service_Amount__c = 7000;
18 *         }
19 *         else if(app.Maintenance_service__c == true){
20 *             app.Service_Amount__c = 2000;
21 *         }
22 *         else if(app.Repairs__c == true){
23 *             app.Service_Amount__c = 3000;
24 *         }
25 *         else if(app.Replacement_Parts__c == true){
26 *             app.Service_Amount__c = 5000;
27 *         }
28 *
29 *     }
30 * }
31 }
```

## New Apex Trigger

Name:

sObject:

**Submit**

File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < >

AmountDistribution.apxt \* AmountDistributionHandler.apxc \*

Code Coverage: None API Version: 58

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

REPORTS

CREATE REPORT FOLDER



Search Setup



Setup

Home

Object Manager



## App Launcher



Search apps and items...

### Apps



Service



Marketing CRM Classic



Community



Salesforce Chatter



Content



Sales Console



Service Console

[View All](#)

Optimizer

Sales Cloud Everywhere

ADMINISTRATION

Users

SETUP

## Home

### a Cloud

Connect, prepare, harmonize, unify, and analyze 360-degree view of your customers.

[Watch Video](#)

### Most Recently Used

10 items

NAME

The screenshot shows the Salesforce Lightning interface with the URL <https://orgfarm-f98201a926-dev-ed.lightning.force.com/one/one.app#/eyjb21wb25lbnREZWYIOiJyZXVcnRzOnJlcG9ydEJ1aWxkZX0iLCjhHRyaWJ1dGVzIjp7InJy29yZEfkjoiliwibmV...>. The top navigation bar includes links for Customer Details, Appointments, Service records, Billing details and feedback, Reports (selected), and Dashboards. A search bar at the top right contains the placeholder "Search...". The main content area is titled "Create Report". On the left, a sidebar under "Category" shows "Recently Used" selected, with a list of report types: All, Accounts & Contacts, Opportunities, Customer Support Reports, Leads, Campaigns, Activities, Contracts and Orders, Price Books, Products and Assets, Administrative Reports, File and Content Reports, Individuals, Other Reports, and Hidden Report Types. To the right, there is a section titled "Select a Report Type" with a search bar and a table titled "Recently Used Report Types" showing one entry: "Service records" under "Category Standard".

## SHARING A REPORT FOLDER

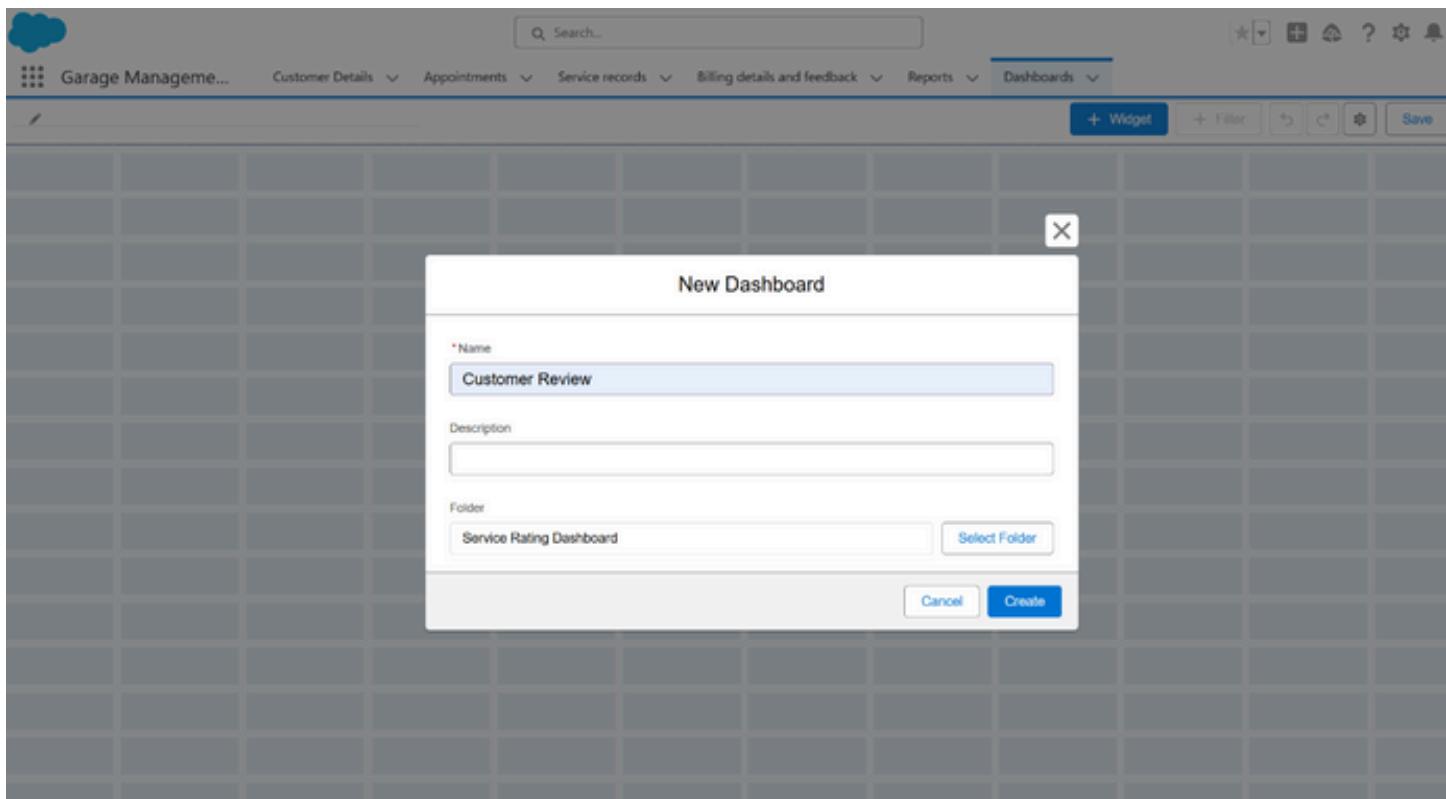
The screenshot shows a "Create folder" dialog box. It has two required fields: "Folder Label" containing "Service Rating" and "Folder Unique Name" containing "ServiceRating". At the bottom right are "Cancel" and "Save" buttons.

Folder Label	Service Rating
Folder Unique Name	ServiceRating

Cancel Save

## DASH BOARDS

### CREATE A DASH BOARD FOLDER



### CREATE A DASH BOARD

## New Service information Report



Payment Status

Completed



[View Report \(New Service information Report\)](#)

USER ADOPTION

CREATING RECORDS

## New Customer Detail

\* = Required Information

### Information

\* Customer Name

Phone number

Gmail

Owner

 Annapurna SmartBridge

## New Service record

\* = Required Information

### Information

Service Record Name

Owner

 Annapurna SmartBridge

\* Appointment

 app-016

Quality Check Status

Service Status

Service Record Name Owner  
ser-010 Annapurna SmartBridge

\* Appointment

Quality Check Status

Service Status

service date  
18/11/2024  
*This field is calculated upon save*

Created By    Last Modified By

Related **Details**

Service Record Name Owner  
ser-010 Annapurna SmartBridge

Appointment

Quality Check Status

Service Status  
Completed

service date  
18/11/2024

Created By  Last Modified By

## Conclusion

The Garage Management System project successfully streamlines the day-to-day operations of a garage by automating core tasks such as customer registration, vehicle details management, service scheduling, billing, and report generation. By reducing manual effort and minimizing errors, it enhances efficiency, accuracy, and customer satisfaction. The system provides an easy-to-use interface for staff, secure data storage, and quick access to service records, making overall management more reliable and organized. In conclusion, this project demonstrates how technology can simplify garage operations, save time, and improve productivity, while also laying the foundation for future enhancements such as online booking, inventory management, and mobile integration.