



## Garage Management system

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## Project Overview

The **Garage Management System** is designed to automate and streamline the operations of a vehicle service center. It manages customer details, service appointments, repair records, billing, and feedback through a centralized Salesforce application.

This system minimizes manual data entry and ensures efficient tracking of service processes — from appointment scheduling to billing and feedback collection.

The project leverages **Salesforce automation tools** such as *Custom Objects, Lookup Relationships, Validation Rules, Flows, Apex Triggers, and Reports/Dashboards* to create a smart and efficient garage management experience.

## Objective

The primary objective of the Garage Management System is to simplify and automate the vehicle service process, enabling smooth interaction between customers, mechanics, and the management team.

### Business Goals:

#### A. Simplify Customer and Appointment Management

Create a digital system that stores and manages all customer and appointment information efficiently.

#### B. Automate Billing and Service Records

Generate accurate billing details and automatically calculate service costs using triggers and flows.

#### C. Enhance Transparency and Feedback

Provide customers with clear billing summaries and enable feedback collection for service quality improvement.

#### D. Improve Workflow Efficiency

Automate repetitive tasks using Salesforce automation tools to save time and reduce human error.

#### E. Build Analytical Dashboards

Generate insightful reports and dashboards to track service performance, customer satisfaction, and revenue trends.

## Salesforce Key Features and Concepts Utilized

### Custom Objects

#### 1. Customer Details

Stores customer information such as name, phone number, and email.

Fields include:

- Customer Name (Record Name)
- Phone Number (Phone)
- Gmail (Email)

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes tabs for Platform Login Credentials, Student, Recently Viewed, Customer Details, and Customer Details | Salesforce. Below the navigation is a search bar labeled 'Search Setup'. The main area displays the 'Customer Details' object under 'SETUP > OBJECT MANAGER'. On the left, a sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, etc. The 'Fields & Relationships' section is currently selected and shows a table with six items. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The data is as follows:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Customer Name	Name	Text(80)		✓
Gmail	Gmail__c	Email		
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone number	Phone_number__c	Phone		

#### 2. Appointment

Manages all service appointments with customers.

- Record Name: Auto Number (app-{000})
- Key Fields: Appointment Date, Vehicle Number Plate, Service Amount, Maintenance Service, Repairs, Replacement Parts

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

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Appointment Date	Appointment_Date_c	Date		
Appointment Id	Appointment_Id_c	Long Text Area(32768)		
Appointment Name	Name	Text(80)		✓
Contact	Contact_c	Lookup(Contact)		✓
Created By	CreatedBy	Lookup(User)		
Customer Details	Customer_Details_c	Lookup(Customer Details)		✓
Customer Id	Customer_Id_c	Text(60)		

### 3. Service Records

Tracks all service details linked to appointments.

- Record Name: Auto Number (ser-{000})
- Key Fields: Service Status (Picklist), Quality Check Status (Checkbox), Service Date (Formula)

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

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Appointment	Appointment_c	Lookup(Appointment)		✓
Appointment Date	Appointment_Date_c	Date		
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Quality Check Status	Quality_Check_Status_c	Checkbox		
service date	service_date_c	Formula (Date)		

#### 4. Billing Details and Feedback

Handles payment details and customer feedback after services.

- Record Name: Auto Number (bill-{000})
- Key Fields: Payment Paid (Currency), Payment Status (Picklist), Rating for Service (Text)

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes tabs for Platform Login Credentials, Student, Recently Viewed, Home, and Billing details and feedback. Below the navigation is a search bar and a toolbar with various icons. The main area displays the 'Billing details and feedback' object under 'SETUP > OBJECT MANAGER'. On the left, a sidebar lists categories like Page Layouts, Lightning Record Pages, Buttons, etc. The main content area is titled 'Fields & Relationships' and shows eight items. A table lists the fields with their labels, names, data types, controlling fields, and indexing status. The fields are:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Billing details and feedback Name	Name	Auto Number		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Payment Paid	Payment_Paid__c	Currency(18, 0)		
Payment Status	Payment_Status__c	Picklist		
Rating for service	Rating_for_service__c	Text(1)		

## Relationships

### 1. Appointment ↔ Customer Details (Lookup Relationship)

- Each appointment record is linked to a customer.
- Ensures easy tracking of which customer booked which appointment.

**Edit Battery Check**

\* = Required Information

**Appointment Name:** Battery Check

**Customer Details:** Owner: Srinidhi P, Customer: Mac

**Appointment Date:** 10/23/2025

**Maintenance service:**

**Repairs:**

**Replacement Parts:**

**Service Amount:** \$5,000

**Note:** Service history

**Buttons:** Cancel, Save & New, Save

## 2. Service Records ↔ Appointment (Lookup Relationship)

- Each service record belongs to an appointment.
- Automatically updates service status based on quality checks.

**Edit ser-020**

\* = Required Information

**Service records Name:** ser-020

**Appointment Date:** 10/23/2025

**Appointment:** Battery Check

**Quality Check Status:**

**Service Status:** Completed

**service date:** 10/31/2024  
This field is calculated upon save

**Created By:** Srinidhi P | **Last Modified By:** Srinidhi P | **Created Date:** 10/30/2025, 10:54 PM

**Buttons:** Cancel, Save & New, Save

## 3. Billing Details and Feedback ↔ Service Records (Lookup Relationship)

- Each billing record connects to a service record.

- Ensures that billing and feedback are tied to the correct service instance

The screenshot shows the 'Edit bill-015' page in the Garage Management Application. The page contains the following information:

- Billing details and feedback Name:** bill-015
- Service records:** ser-019
- Payment Paid:** \$7,000
- Rating for service:** 3
- Payment Status:** Completed
- Created By:** Srinidhi P, 10/30/2025, 2:26 AM
- Last Modified By:** Srinidhi P, 10/30/2025, 2:26 AM

Buttons at the bottom include Cancel, Save & New, and Save.

## Tabs:

Custom tabs were created for **Customer Details**, **Appointments**, **Service Records**, and **Billing Details & Feedback** to enable easy navigation within the Garage Management System. Each tab helps users quickly access and manage related records, improving workflow efficiency.

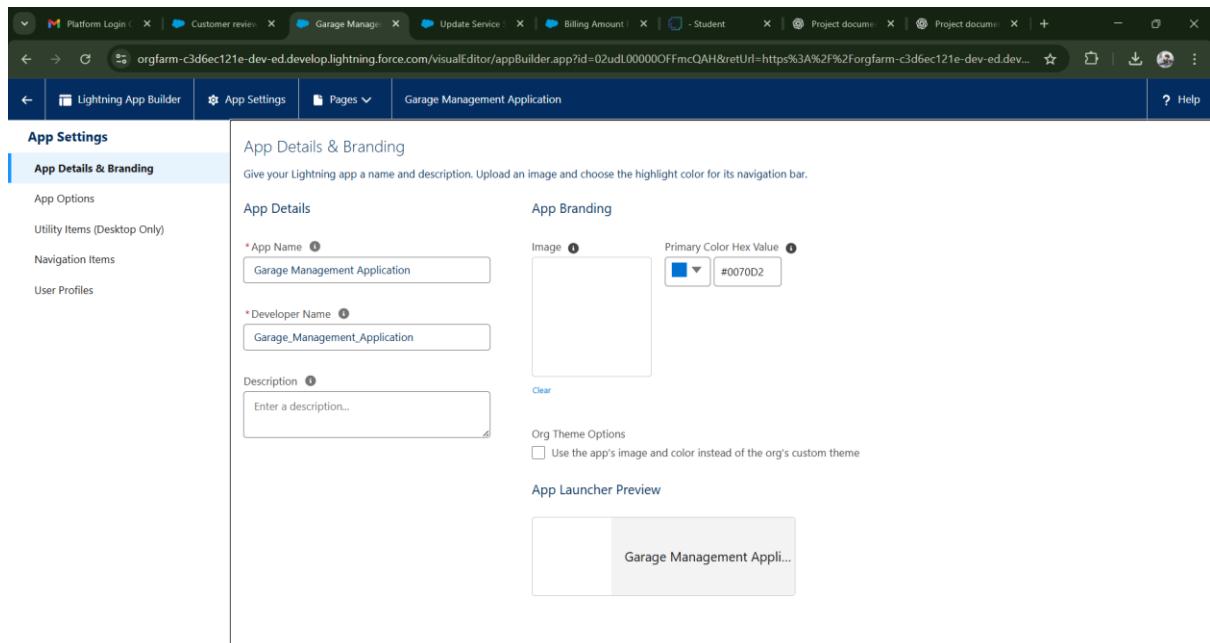
The screenshot shows the 'Tabs' page in the Salesforce Setup. The page includes the following sections:

- Custom Object Tabs:**

Action	Label	Tab Style	Description
Edit   Del	Appointments	Alarm clock	
Edit   Del	Billing details and feedback	Credit card	
Edit   Del	Customer Details	Gears	
Edit   Del	Service records	Books	
- Web Tabs:** No Web Tabs have been defined.
- Visualforce Tabs:** No Visualforce Tabs have been defined.

## Lightning App Development

- **App Name:** Garage Management Application
- Added Tabs: Customer Details, Appointments, Service Records, Billing Details & Feedback, Reports, Dashboards
- Profile Access: System Administrator
- Ensures all essential modules are accessible within one interface.



## Duplicate Rules:

### Matching Rule:

A matching rule was created on the **Customer Details** object to identify duplicate records based on the **Gmail** and **Phone Number** fields. It ensures that each customer is unique by comparing new entries with existing records, maintaining clean and accurate customer data.

The screenshot shows the Salesforce Setup interface with the Matching Rules page open. The URL is <https://orgfarm-c3d6ec121e-dev-ed.my.salesforce-setup.com/lightning/setup/MatchingRules/page?address=%2F0JDDl0000HMOfh>. The page title is "Matching Rules". A matching rule named "Matching customer details" is displayed, configured for the "Customer Details" object. The matching criteria are defined as "(Customer Details: Gmail EXACT MatchBlank = FALSE) AND (Customer Details: Phone\_number EXACT MatchBlank = FALSE)". The rule was created by Srinidhi P. on 10/27/2025, 3:03 AM, and modified by Srinidhi P. on 10/27/2025, 3:04 AM.

## Duplicate

**Rule:**

A duplicate rule was configured for the **Customer Details** object using the created matching rule. It prevents users from adding duplicate customer records by displaying a warning or blocking the save action when a matching Gmail or phone number already exists.

The screenshot shows the Salesforce Setup interface with the Duplicate Rules page open. The URL is <https://orgfarm-c3d6ec121e-dev-ed.my.salesforce-setup.com/lightning/setup/DuplicateRules/page?address=%2F0Bmdl0000HFP9B%3Fsetupid%3DDuplicateRules>. The page title is "Duplicate Rules". A duplicate rule named "Customer Detail duplicate" is displayed, configured for the "Customer Details" object. The rule uses the "Matching customer details" matching rule and has an alert set to "Report". The rule was created by Srinidhi P. on 10/27/2025, 3:06 AM, and modified by Srinidhi P. on 10/27/2025, 3:06 AM.

## Validation Rules

### 1. Appointment Object – Vehicle Number Plate Validation

Ensures that vehicle numbers follow a proper format.

**Error Message:** “Please enter valid number.”

The screenshot shows the Salesforce Setup interface with the Object Manager selected. A validation rule for the 'Appointment' object is displayed. The rule is named 'Vehicle' and is active. The error condition formula is NOT(REGEX( Vehicle\_number\_plate\_\_c , "[A-Z]{2}[0-9]{2}[A-Z]{2}[0-9]{4}")) and the error message is 'Please enter valid number'. The error location is 'Vehicle number plate'. The rule was created by Srinidhi\_P on 10/27/2025 at 2:59 AM and modified by the same user on the same date and time.

## 2. Billing Details and Feedback – Rating Validation

Ensures feedback rating is between 1 and 5.

**Error Message:** “Rating should be from 1 to 5.”

The screenshot shows the Salesforce Setup interface with the Object Manager selected. A validation rule for the 'Billing details and feedback' object is displayed. The rule is named 'rating\_should\_be\_less\_than\_5' and is active. The error condition formula is NOT( REGEX( Rating\_for\_service\_\_c , "[1-5][1]")) and the error message is 'rating should be from 1 to 5'. The error location is 'Rating for service'. The rule was created by Srinidhi\_P on 10/27/2025 at 3:01 AM and modified by the same user on the same date and time.

## Profiles

### 1. Manager

- Full access to all objects.

- Session timeout: 8 hours.
- Passwords never expire.

**Profile 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.

Profile Detail	
Name	Manager
User License	Salesforce
Description	
Created By	Srinidhi P 10/27/2025, 3:07 AM
Modified By	Srinidhi P 10/29/2025, 6:45 AM

**Page Layouts**

Standard Object Layouts

Global	Location Group Assignment	Location Group Assignment Layout
Global Layout! [View Assignment]		
Email Application	Not Assigned [View Assignment]	Macro Layout [View Assignment]

Macro

Location Group Assignment Layout [View Assignment]

Macro Layout [View Assignment]

## 2. Sales Person

- Limited access (create/view own records).
- Default app: Garage Management.

**Profile 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.

Profile Detail	
Name	sales person
User License	Salesforce Platform
Description	
Created By	Srinidhi P 10/27/2025, 9:33 AM
Modified By	Srinidhi P 10/29/2025, 6:45 AM

**Page Layouts**

Standard Object Layouts

Global	Lead	Location Group Assignment
Global Layout! [View Assignment]	Lead Layout [View Assignment]	
Email Application	Not Assigned [View Assignment]	Location Layout [View Assignment]

Lead Layout [View Assignment]

Location Layout [View Assignment]

## Roles

- **Manager Role** (top level)
- **Sales Person Role** (under Manager)

The screenshot shows the 'Roles' section in the Salesforce Setup. The left sidebar lists categories like 'Users', 'Feature Settings', 'Sales', 'Service', and 'Case Teams'. Under 'Sales', 'Case Team Roles' is selected. The main area displays a tree view of the 'Creating the Role Hierarchy'. At the top level is 'Collage All Employees'. Below it are 'CEO', 'CFO', 'COO', 'Manager', 'SVP Customer Service & Support', 'Customer Support International', 'Customer Support North America', 'Installation & Repair Services', 'SVP Human Resources', and 'SVP Sales & Marketing'. Each node has 'Edit', 'Delete', and 'Assign' buttons.

## User Details:

Multiple users were created to manage different roles within the Garage Management System. The **Manager** user oversees all operations and data access, while **Salesperson** users handle appointments, service records, and billing activities. This setup helps test role-based permissions and data-sharing functionalities effectively.

The screenshot shows the 'Users' section in the Salesforce Setup. The left sidebar lists categories like 'Permission Set Groups', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', and 'Users'. Under 'Users', 'Prospector Users' is selected. The main area displays a table titled 'Active Users'. It includes columns for 'Action', 'Full Name', 'Alias', 'Username', 'Role', 'Active', and 'Profile'. The table lists several users with their details and assigned roles. Buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users' are at the top of the table.

## Public Group

- Group Name: *Sales Team*
- Members: Users with Sales Person Role.

The screenshot shows the Salesforce Setup interface with the 'Public Groups' page selected. The left sidebar shows navigation categories like 'Users', 'Public Groups' (which is selected and highlighted in blue), 'Feature Settings', 'Salesforce Files', 'User Interface', 'Global Actions', and 'Publisher Layouts'. The main content area displays the details for the 'Sales Team' group. The group has the following settings:

- Label: Sales Team
- Group Name: Sales\_Team
- Grant Access Using Hierarchies: checked (indicated by a checked checkbox)
- Description: (empty)
- Created By: Srinidhi.P (10/28/2025, 9:28 PM)
- Modified By: Srinidhi.P (10/28/2025, 9:29 PM)

A table below lists the members of the group, showing one member: sales.person under the 'Name' column and Role under the 'Type' column. A 'View All Users' link is also present. At the bottom of the page, there is a note: "Didn't find what you're looking for? Try using Global Search."

## Sharing Settings

- Service Records → Private.
- Sharing Rule:
  - Records owned by Sales Person are shared with Manager (Read/Write access).

The screenshot shows the Salesforce Sharing Settings page. The left sidebar has a search bar and navigation links for Setup, Home, and Object Manager. Under Security, the 'Sharing Settings' link is selected. The main content area displays sharing rules for different objects:

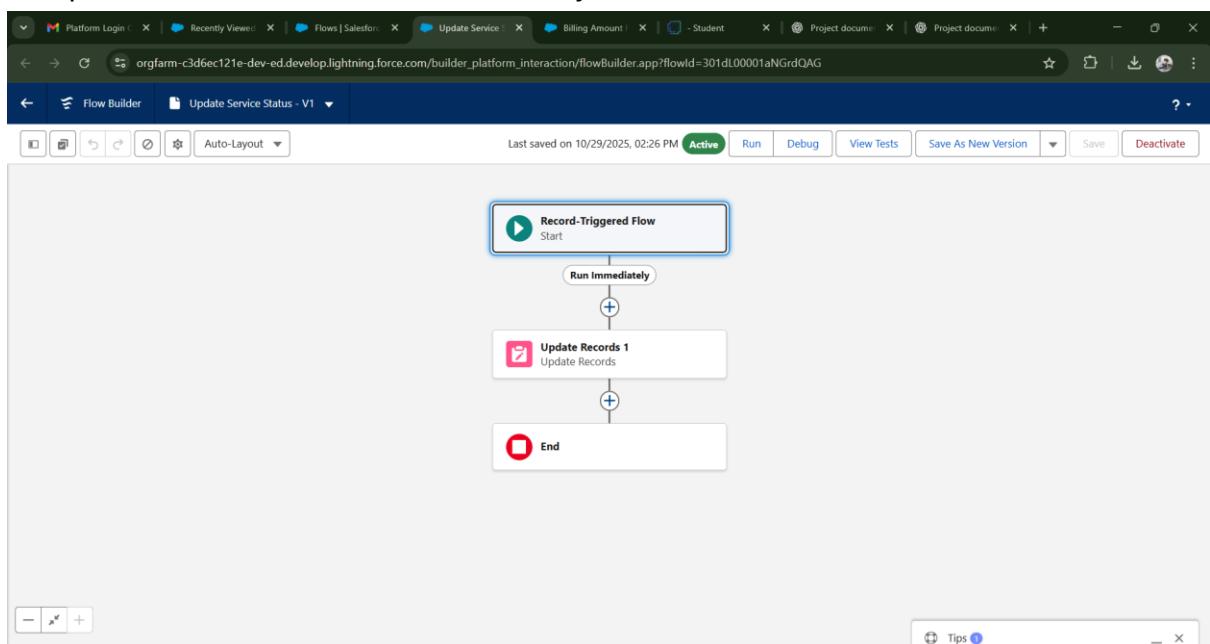
Object	Sharing Rule Type	Access Level	Status
Appointment	Sharing Rule	Public Read/Write	Private
Billing details and feedback	Sharing Rule	Public Read/Write	Private
Customer Details	Sharing Rule	Public Read/Write	Private
Service records	Sharing Rule	Private	Private

Below this, there are sections for 'Other Settings' (Manager Groups, Secure guest user record access, Require permission to view record names in lookup fields) and 'Sharing Rules' (Lead Sharing Rules, New, Recalculate). A message at the bottom says 'No sharing rules specified.'

## Automations and Flows

### Update Service Status Flow:

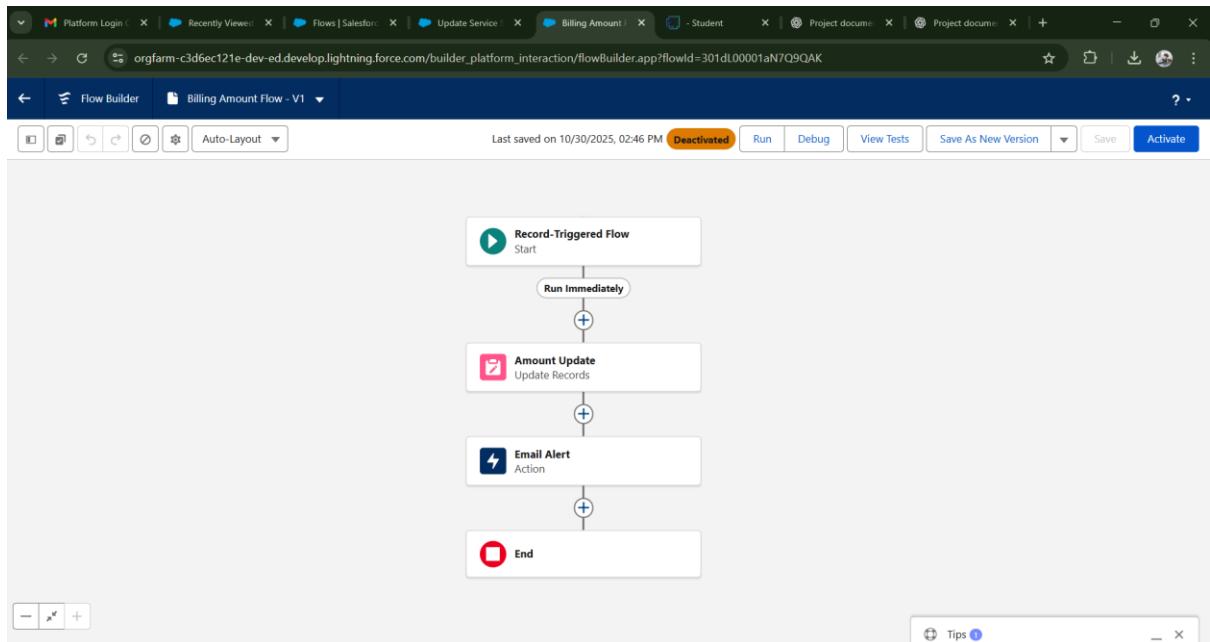
This flow automatically updates the *Service Status* field in the Service Records object to *Completed* when the *Quality Check Status* checkbox is marked true, ensuring that completed services are tracked accurately without manual intervention.



### Billing Amount Flow:

This flow automatically updates the *Payment Paid* field in the Billing Details and Feedback object based on the related *Service Amount* from the Appointment object. Once the payment status is marked as *Completed*, it also sends a confirmation email to

the customer.



## Apex Trigger and Handler

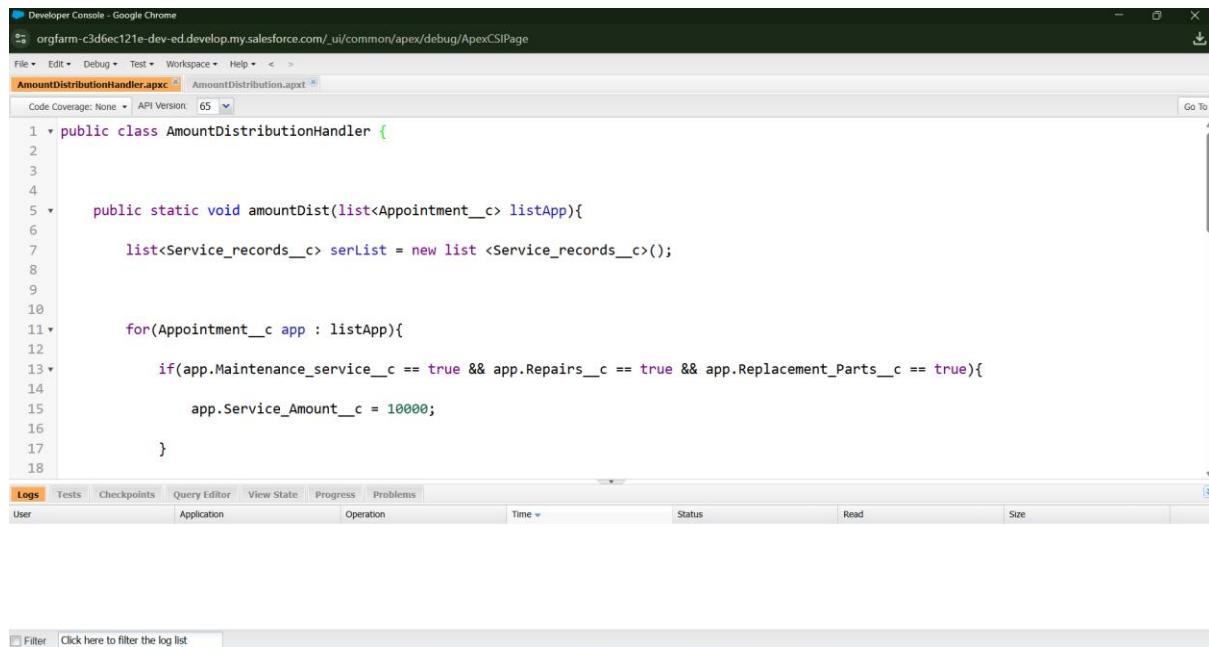
### 1. Apex Trigger:

The **AmountDistribution** trigger runs before insert and update operations in the **Appointment** object, calling the handler to execute the service amount calculation automatically.

```
trigger AmountDistribution on Appointment__c (before insert, before update) {
    if(trigger.isbefore && trigger.isinsert || trigger.isupdate){
        AmountDistributionHandler.amountDist(trigger.new);
    }
}
```

## 2. Apex Handler:

The **AmountDistributionHandler** class automatically calculates the total *Service Amount* based on selected services like Maintenance, Repairs, and Replacement Parts, ensuring accurate and consistent billing.



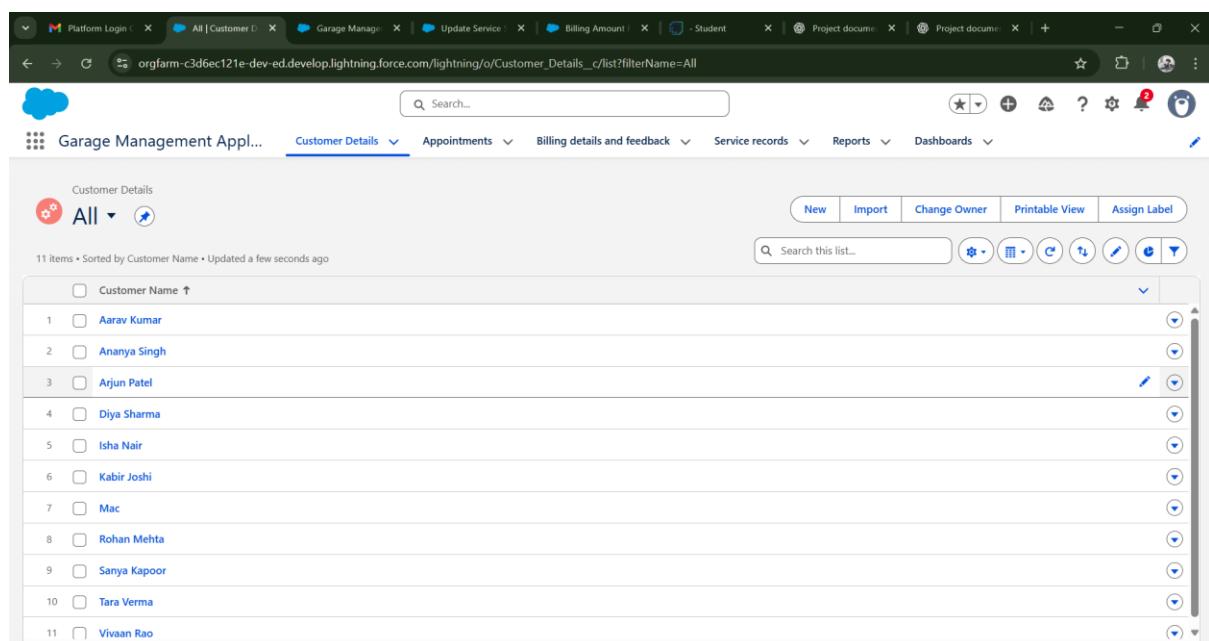
```
1 public class AmountDistributionHandler {  
2  
3  
4  
5     public static void amountDist(List<Appointment__c> listApp){  
6  
7         List<Service_records__c> serList = new List <Service_records__c>();  
8  
9  
10        for(Appointment__c app : listApp){  
11  
12            if(app.Maintenance_service__c == true && app.Repairs__c == true && app.Replacement_Parts__c == true){  
13                app.Service_Amount__c = 10000;  
14            }  
15        }  
16    }  
17}  
18
```

The screenshot shows the Salesforce Developer Console in Google Chrome. The URL is orgfarm-c3d6ec121e-dev-ed.my.salesforce.com/\_ui/common/apex/debug/ApexCSIPage. The tab is titled 'AmountDistributionHandler.apc'. The code editor displays the Apex class 'AmountDistributionHandler' with a single method 'amountDist' that iterates through a list of appointments and sets the Service\_Amount\_\_c field to 10000 for records where Maintenance\_service\_\_c, Repairs\_\_c, and Replacement\_Parts\_\_c are all true. Below the code editor is a logs panel with tabs for Logs, Tests, Checkpoints, Query Editor, View State, Progress, and Problems. The Logs tab is selected, showing a table with columns for User, Application, Operation, Time, Status, and Size. A filter bar at the bottom of the logs panel says 'Filter Click here to filter the log list'.

## Reports:

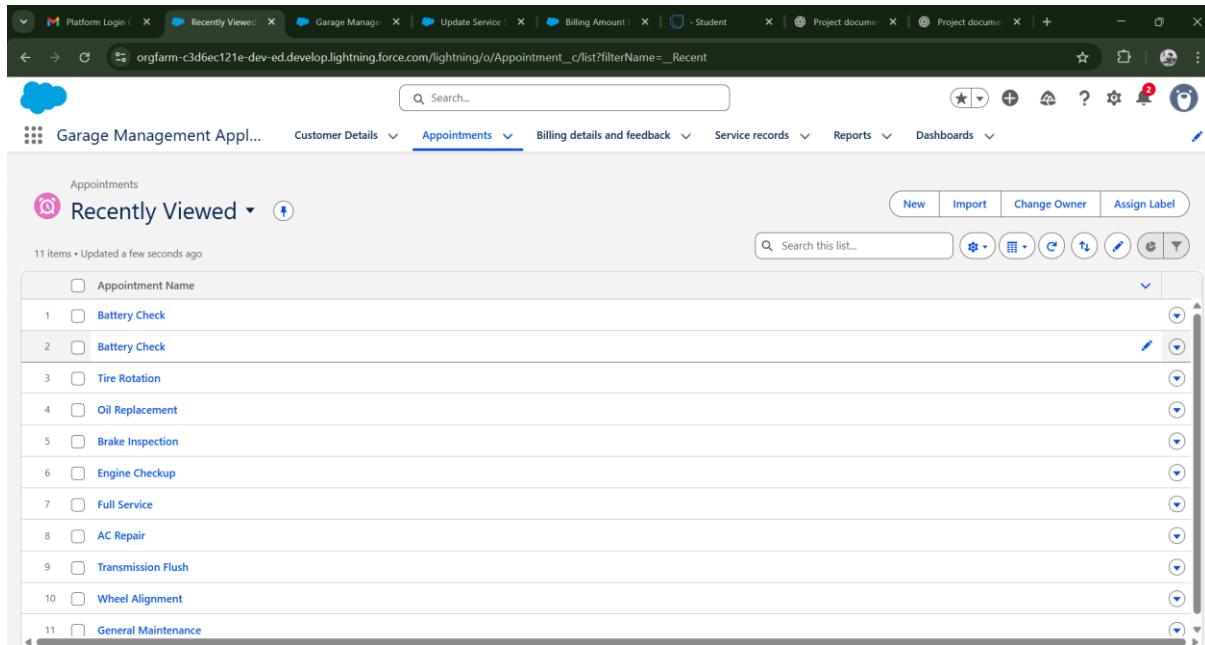
### Record Creation:

1. Customer Details: Created records with customer name, phone number, and Gmail to store client information.



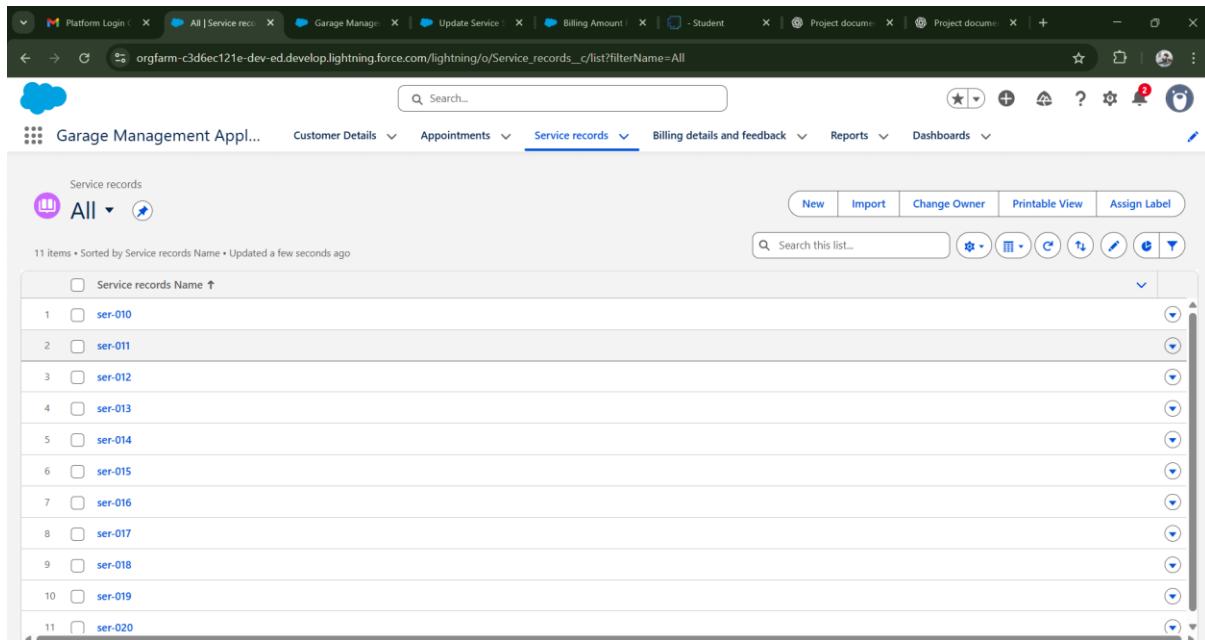
The screenshot shows the Garage Management Application interface in a web browser. The title bar indicates the URL is orgfarm-c3d6ec121e-dev-ed.lightning.force.com/lightning/o/Customer\_Details\_\_c/list?filterName>All. The page header includes links for Customer Details, Appointments, Billing details and feedback, Service records, Reports, and Dashboards. The main content area is titled 'Customer Details' and shows a list of 11 items. The list includes names such as Aarav Kumar, Ananya Singh, Arjun Patel, Diya Sharma, Isha Nair, Kabir Joshi, Mac, Rohan Mehta, Sanya Kapoor, Tara Verma, and Vivaan Rao. Each item has a checkbox next to it and a small edit icon. At the top of the list are buttons for New, Import, Change Owner, Printable View, and Assign Label. A search bar and filter options are also present.

2. Appointment: Created records linked to customers with appointment date, vehicle number plate, and selected service options.



The screenshot shows the 'Appointments' section of the Garage Management Application. The top navigation bar includes links for Platform Login, Recently Viewed, Garage Management, Update Service, Billing Amount, Student, Project document, and Project document. The main menu has tabs for Customer Details, Appointments (which is currently selected), Billing details and feedback, Service records, Reports, and Dashboards. A search bar at the top right says 'Search...'. Below it, a 'Recently Viewed' section lists 11 items, all of which are 'Battery Check'. There are buttons for New, Import, Change Owner, and Assign Label. A search bar below the list says 'Search this list...' with various filter and sort icons. The list itself has numbered rows from 1 to 11, each with a checkbox and a 'Battery Check' entry, followed by a blue edit icon and a dropdown arrow.

3. Service Records: Generated records connected to appointments, marking service progress and performing quality checks.



The screenshot shows the 'Service records' section of the Garage Management Application. The top navigation bar and main menu are identical to the previous screenshot. The 'Service records' tab is selected. A search bar at the top right says 'Search...'. Below it, a 'All' button is shown with a dropdown arrow. A search bar below the list says 'Search this list...' with various filter and sort icons. The list itself has numbered rows from 1 to 11, each with a checkbox and a 'ser-010' entry, followed by a blue edit icon and a dropdown arrow.

4. Billing Details & Feedback: Added billing records with payment status, payment amount, and service rating to verify automation and flows.

Billing details and feedback

All

10 items • Sorted by Billing details and feedback Name • Updated a few seconds ago

	Billing details and feedback Name
1	bill-006
2	bill-007
3	bill-008
4	bill-009
5	bill-010
6	bill-011
7	bill-012
8	bill-013
9	bill-014
10	bill-015

## Report Type: “Service Information”

- **Primary Object:** Customer Details
- **Related Objects:** Appointment → Service Records → Billing Details and Feedback
- Displays: Customer Name, Appointment Date, Service Status, Payment Paid, Rating for Service.

Customer Details

Recently Viewed

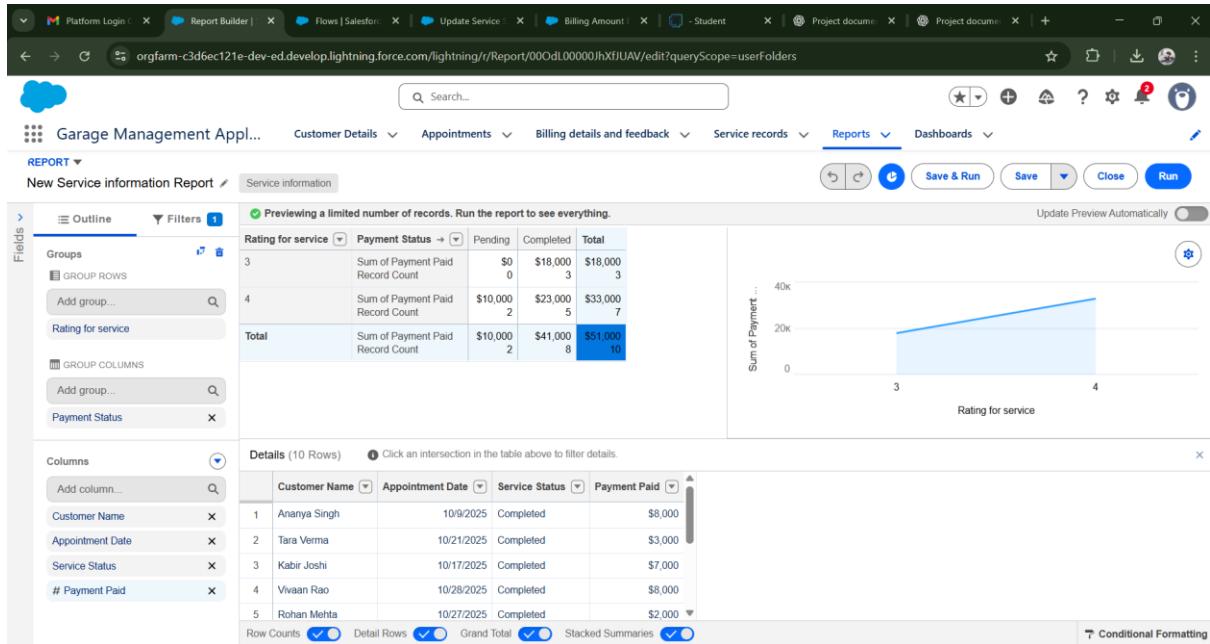
2 items • Updated a few seconds ago

	Customer Name
1	Mac
2	Aarav Kumar

## Report Creation

- Filters unnecessary fields.

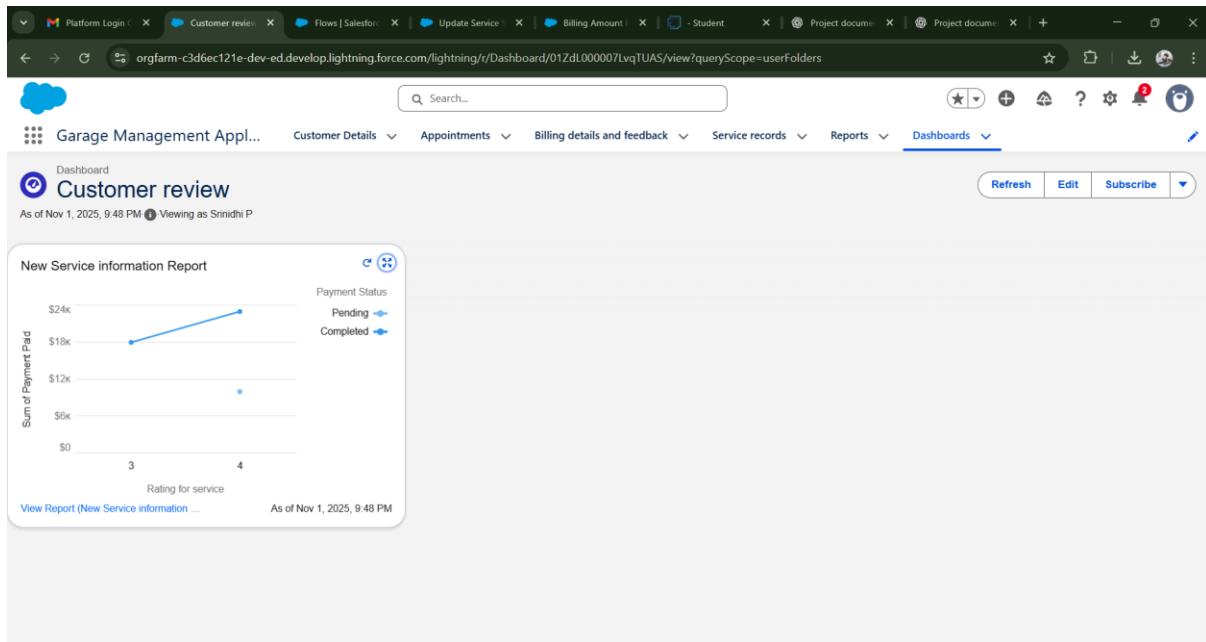
- Groups by *Payment Status* and *Rating for Service*.
- Adds a **Line Chart** for payment insights.



## Dashboard:

### Dashboard Creation

- Folder Name: *Service Rating Dashboard*
- Displays visual analytics of:
  - Service Completion Rate
  - Payment Status Summary
  - Customer Ratings Overview
- Subscription set to **Weekly (Every Monday)**.



## Key Scenarios Addressed by Salesforce in the Implementation Project:

- **Efficient Customer Management:**  
Salesforce centralized all customer details, making it easy to track contact information and service history.
- **Automated Appointment Scheduling:**  
The system managed appointment creation and linking with customers, reducing manual scheduling errors.
- **Service Tracking and Quality Updates:**  
Automated flows updated service status to *Completed* when quality checks were done, ensuring real-time tracking.
- **Billing and Payment Automation:**  
The Billing Amount Flow updated payment details and sent confirmation emails automatically when payments were completed.
- **Feedback and Performance Monitoring:**  
Customer feedback was collected through billing records, helping assess service quality and customer satisfaction.
- **Role-Based Access and Security:**  
Different profiles and roles ensured that managers and salespersons had proper data access and sharing permissions.
- **Reporting and Dashboard Insights:**  
Custom reports and dashboards provided visual insights into payments, service performance, and customer ratings for better decision-making.

## 12. Conclusion

The **Garage Management System** provides an integrated, automated solution for managing all aspects of vehicle servicing.

This screenshot shows a report titled "Report: Service information" for a "New Service information Report". The report displays a summary table with two rows: "Total Records" (10) and "Total Payment Paid" (\$51,000). Below this is a chart titled "Rating for service" showing a distribution from 0 to 40k. A table titled "Details (10 Rows)" lists customer names, appointment dates, service statuses, and payment paid. The table includes columns for Customer Name, Appointment Date, Service Status, and Payment Paid. The data shows five completed services for various customers.

	Customer Name	Appointment Date	Service Status	Payment Paid
1	Ananya Singh	10/9/2025	Completed	\$8,000
2	Tara Verma	10/21/2025	Completed	\$3,000
3	Kabir Joshi	10/17/2025	Completed	\$7,000
4	Vivaan Rao	10/28/2025	Completed	\$8,000
5	Rohan Mehta	10/27/2025	Completed	\$2,000

This screenshot shows the same report interface but with a different set of data. The summary table and chart remain the same. The "Details (10 Rows)" table now lists a different set of completed services for various customers, including Sanya Kapoor, Aarav Kumar, Arjun Patel, Isha Nair, and others. The table structure is identical to the one in the first screenshot.

	Customer Name	Appointment Date	Service Status	Payment Paid
7	Sanya Kapoor	10/22/2025	Completed	\$8,000
8	Aarav Kumar	10/12/2025	Completed	\$2,000
9	Arjun Patel	10/2/2025	Completed	\$2,000
10	Isha Nair	10/15/2025	Completed	\$8,000
11				\$51,000