

PROJECT TITLE

GARAGE MANAGEMENT SYSTEM

College Name: NANDHA ARTS AND SCIENCE COLLEGE (AUTONOMOUS)

College Code : bru4j

TEAM ID: NM2025TMID22876

TEAM SIZE: 5

Team LeaderName: Yazhini.S

Email: yazlsekar@gmail.com

Team Member1: Yuvasree.A

Email: yuvasreeyuva23@gmail.com

Team Member2: Rohith.J

Email: sumathirajini461@gmail.com

Team Member3: Sujith.K

Email : k.t.sujith67@gmail.com

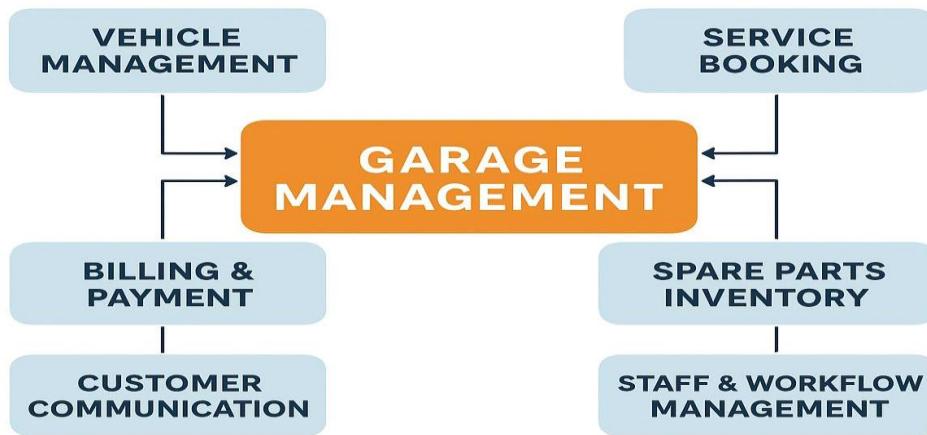
Team Member4: Madhan.S

Email : madhanmadhan6642@gmail.com

1. INTRODUCTION

Project Overview:

The Garage Management System is a Salesforce-based application that automates vehicle service center operations, including customer details, service bookings, repairs, billing, and inventory. By using Salesforce features like Flows and Approval Processes, it improves efficiency, reduces errors, and enhances customer satisfaction.



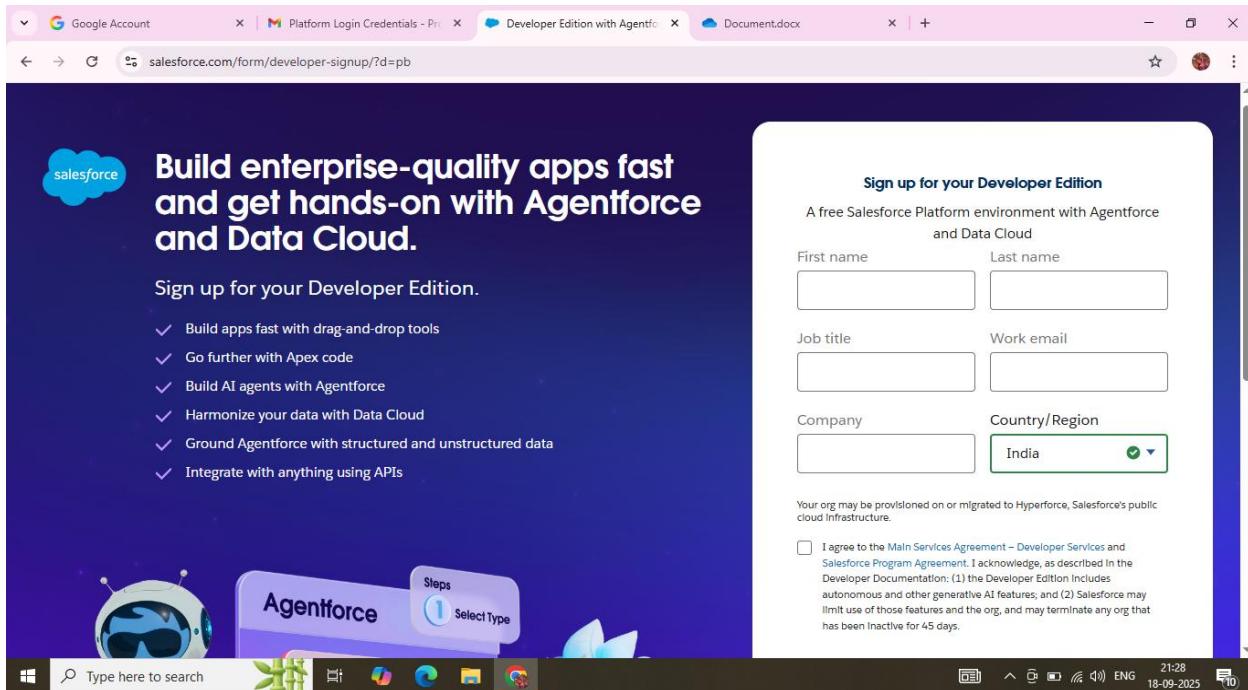
Purpose :

The project aims to provide a centralized system for garage operations, reducing manual work, ensuring accurate service tracking, improving customer communication, and enhancing efficiency, inventory management, and record-keeping to build customer trust and support business growth.

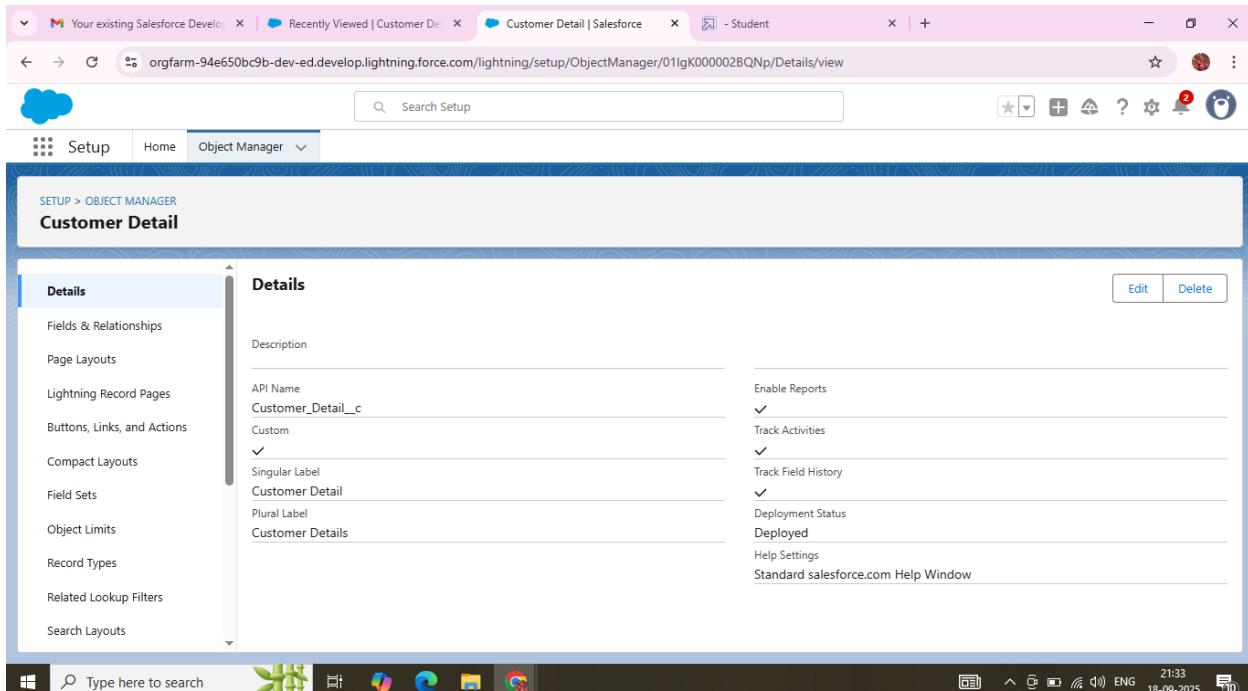
DEVELOPMENT PHASE

Creating Developer Account:

By using this URL- <https://www.salesforce.com/form/developer-signup/?d=pb>



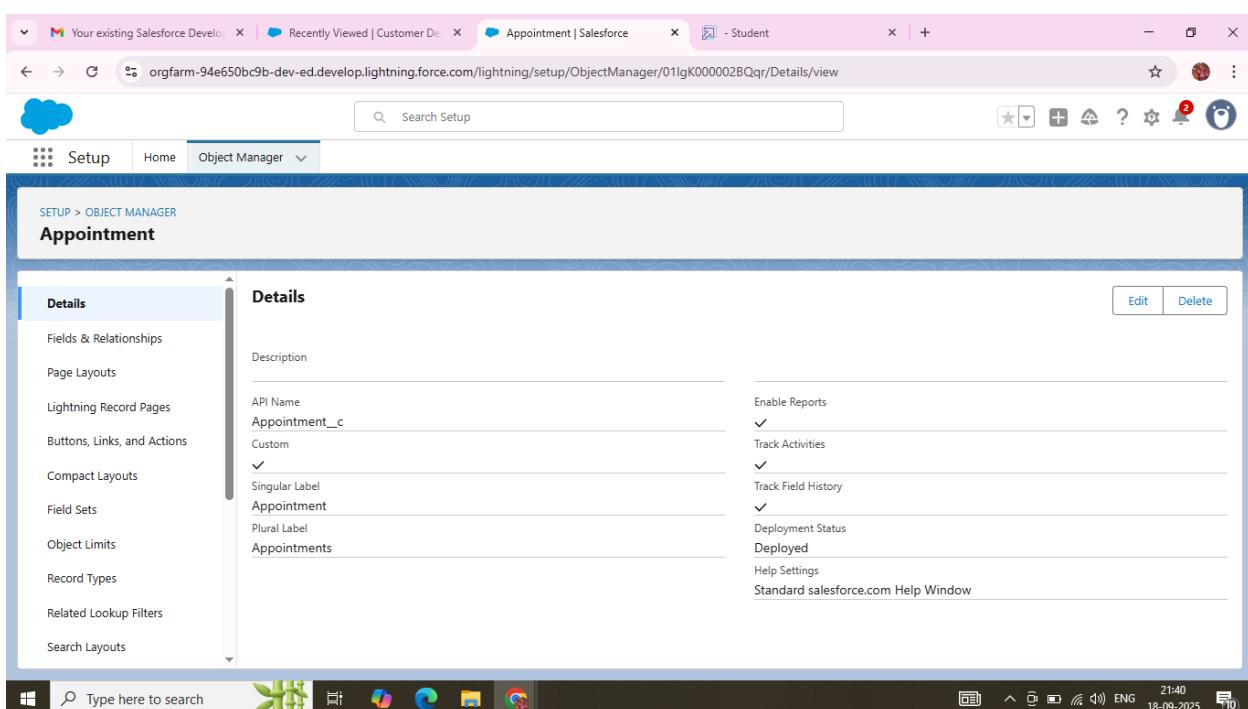
Created Objects: Customer Detail, Appointment, Service Records, Billing Details and Feedback



The screenshot shows the Salesforce Object Manager interface for the 'Customer Detail' object. The left sidebar lists various configuration options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main 'Details' pane shows the following fields:

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

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



The screenshot shows the Salesforce Object Manager interface for the 'Appointment' object. The left sidebar lists the same configuration options as the previous screenshot. The main 'Details' pane shows the following fields:

Field	Value
Description	
API Name	Appointment__c
Custom	✓
Singular Label	Appointment
Plural Label	Appointments
Enable Reports	✓
Track Activities	✓
Track Field History	✓
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

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

Your existing Salesforce Development Environment | Recently Viewed | Customer Details | Service records | Salesforce - Student

orgfarm-94e650bc9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000002BRGz/Details/view

Cloud icon | Search Setup | Home | Object Manager

SETUP > OBJECT MANAGER
Service records

Details

Description

API Name: Service_record__c

Custom: ✓

Singular Label: Service records

Plural Label: Service records

Details

Edit | Delete

Enable Reports: ✓

Track Activities: ✓

Track Field History: ✓

Deployment Status: Deployed

Help Settings: Standard salesforce.com Help Window

Type here to search | Windows Start button | Taskbar icons | 21:42 18-09-2025

Your existing Salesforce Development Environment | Recently Viewed | Customer Details | Billing details and feedback | Salesforce - Student

orgfarm-94e650bc9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000002BRgT/Details/view

Cloud icon | Search Setup | Home | Object Manager

SETUP > OBJECT MANAGER
Billing details and feedback

Details

Description

API Name: Billing_details_and_feedback__c

Custom: ✓

Singular Label: Billing details and feedback

Plural Label: Billing details and feedback

Details

Edit | Delete

Enable Reports: ✓

Track Activities: ✓

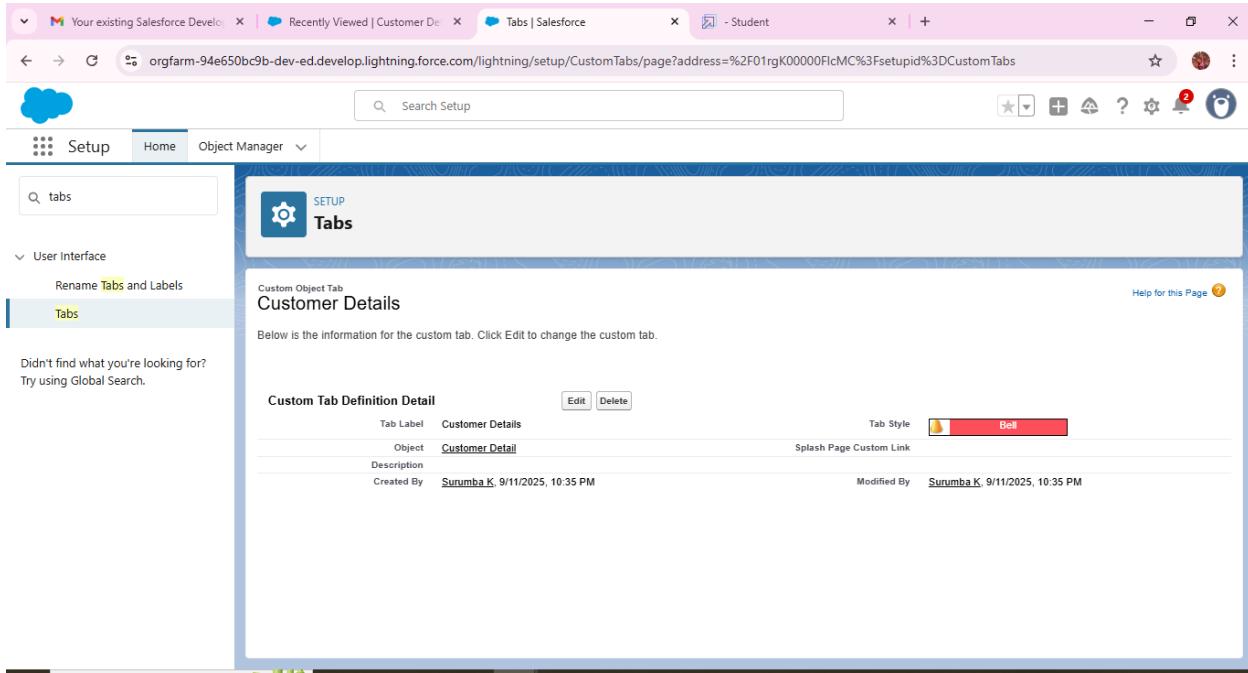
Track Field History: ✓

Deployment Status: Deployed

Help Settings: Standard salesforce.com Help Window

Type here to search | Windows Start button | Taskbar icons | 21:43 18-09-2025

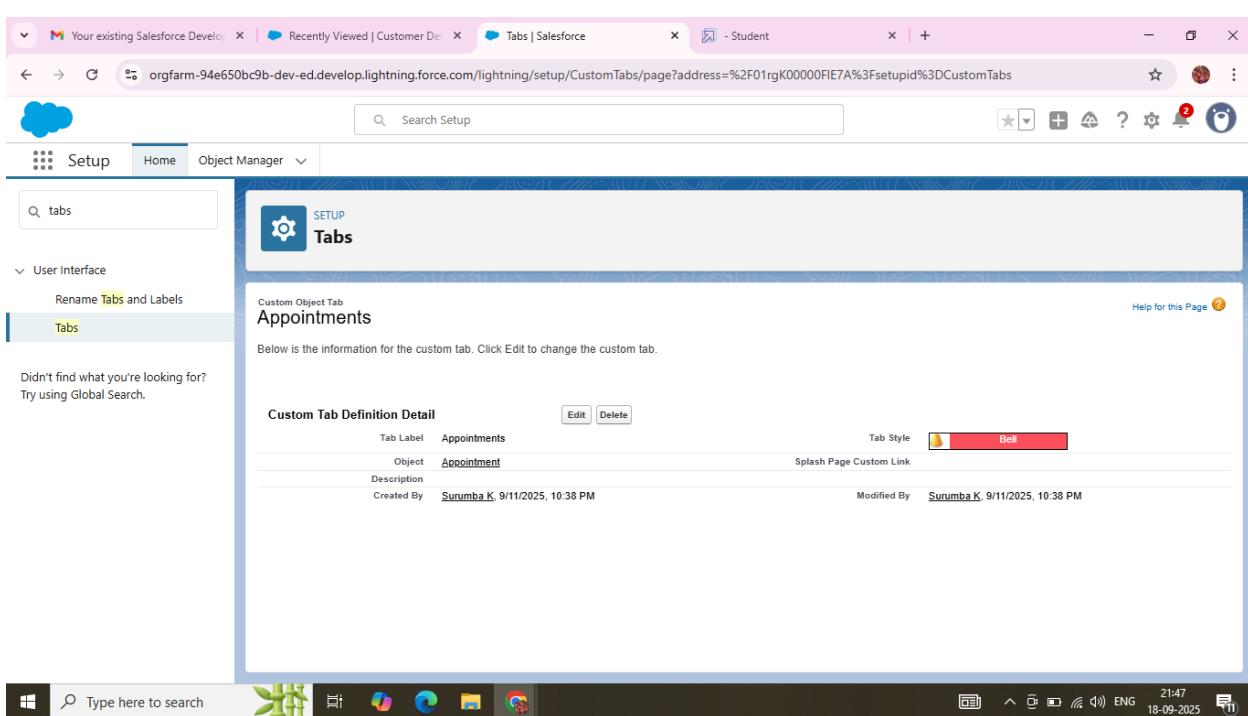
Created Tabs: Customer Details, Appointment, Service Records, Billing Details and Feedback



The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. A custom object tab named 'Customer Details' has been created. The tab definition details are as follows:

Custom Tab Definition Detail	Tab Label	Object	Description	Created By	Modified By	Tab Style	Splash Page Custom Link
	Customer Details	Customer Detail		Surumba K, 9/11/2025, 10:35 PM	Surumba K, 9/11/2025, 10:35 PM	Bell	

Below the tab definition, there is a note: "Didn't find what you're looking for? Try using Global Search."



The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. A custom object tab named 'Appointments' has been created. The tab definition details are as follows:

Custom Tab Definition Detail	Tab Label	Object	Description	Created By	Modified By	Tab Style	Splash Page Custom Link
	Appointments	Appointment		Surumba K, 9/11/2025, 10:38 PM	Surumba K, 9/11/2025, 10:38 PM	Bell	

Below the tab definition, there is a note: "Didn't find what you're looking for? Try using Global Search."

Your existing Salesforce Developer | Recently Viewed | Customer De | Tabs | Salesforce - Student

orgfarm-94e650bc9b-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2F01rgK00000F1PHD%3Fsetupid%3DCustomTabs

Cloud icon

Search Setup

Setup Home Object Manager

tabs

User Interface

Rename Tabs and Labels

Tabs

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

Custom Object Tab
Service records

Help for this Page

Custom Tab Definition Detail

Tab Label	Service records	Tab Style	Bell
Object	Service records	Splash Page Custom Link	
Description			
Created By	Surumba K 9/11/2025, 10:39 PM	Modified By	Surumba K 9/11/2025, 10:39 PM

Type here to search

Windows taskbar: 21:48 18-09-2025

Your existing Salesforce Developer | Recently Viewed | Customer De | Tabs | Salesforce - Student

orgfarm-94e650bc9b-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2F01rgK00000F1JXn%3Fsetupid%3DCustomTabs

Cloud icon

Search Setup

Setup Home Object Manager

tabs

User Interface

Rename Tabs and Labels

Tabs

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

Custom Object Tab
Billing details and feedback

Help for this Page

Custom Tab Definition Detail

Tab Label	Billing details and feedback	Tab Style	Boat
Object	Billing details and feedback	Splash Page Custom Link	
Description			
Created By	Surumba K 9/11/2025, 10:40 PM	Modified By	Surumba K 9/11/2025, 10:40 PM

Type here to search

Windows taskbar: 21:48 18-09-2025

Created Lightning App: Garage Management Application

The screenshot shows the Lightning App Builder interface. The top navigation bar includes tabs for 'Lightning App Builder', 'App Settings', 'Pages', and the current page 'Garage Management Application'. The main content area is titled 'App Details & Branding' and contains fields for 'App Name' (Garage Management Application), 'Developer Name' (Garage_Management_Application), 'Image' (a placeholder box with an 'Upload' button), 'Primary Color Hex Value' (#050F18), and a 'Description' field (Enter a description...). Below these are 'Org Theme Options' and 'App Launcher Preview' sections. The bottom of the screen shows a Windows taskbar with various icons and system status.

Created fields in an object for: Customer Details (Phone Number) (Gmail)

The screenshot shows the Salesforce Setup interface, specifically the 'Object Manager'. The top navigation bar includes tabs for 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'Customer Detail' and shows a 'Customer Detail Custom Field' named 'Phone number'. The 'Custom Field Definition Detail' section displays the following information:

Field Label	Phone number	Object Name	Customer_Detail
Field Name	Phone_number	Data Type	Phone
API Name	Phone_number_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Surumba_K_ 9/11/2025, 10:48 PM	Modified By	Surumba_K_ 9/11/2025, 10:48 PM

The left sidebar lists various setup categories: Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The bottom of the screen shows a Windows taskbar with various icons and system status.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes tabs for 'Your existing Salesforce Dev...', 'Recently Viewed | Customer De...', 'Customer Detail | Salesforce', and '- Student'. The main title is 'Customer Detail'. The left sidebar under 'SETUP > OBJECT MANAGER' lists options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The current view is 'Fields & Relationships'. The main content area displays a 'Customer Detail Custom Field' named 'Gmail'. The 'Field Information' section shows the field label 'Gmail', field name 'Gmail', API name 'Gmail__c', object name 'Customer Detail', and data type 'Email'. The 'Custom Field Definition Detail' section includes tabs for 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'General Options' section shows 'Required' and 'Unique' checkboxes. The status bar at the bottom indicates '22:07 18-09-2025'.

Creation of Lookup Field on Appointment Object :(Customer Detail)

The screenshot shows the Salesforce Setup interface. The top navigation bar includes tabs for 'Your existing Salesforce Dev...', 'Recently Viewed | Customer De...', 'Appointment | Salesforce', and '- Student'. The main title is 'Appointment'. The left sidebar under 'SETUP > OBJECT MANAGER' lists options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The current view is 'Fields & Relationships'. The main content area displays an 'Appointment Custom Field' named 'Customer Detail'. The 'Field Information' section shows the field label 'Customer Detail', field name 'Customer_Detail', API name 'Customer_Detail__c', object name 'Appointment', and data type 'Lookup'. The 'Custom Field Definition Detail' section includes tabs for 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Lookup Options' section shows 'Related To' as 'Customer Detail' and 'Child Relationship Name' as 'Appointments'. The status bar at the bottom indicates '22:10 18-09-2025'.

Creation of Lookup Field on Service Records Object : (Appointment)

The screenshot shows the Salesforce Setup interface. The top navigation bar includes tabs for 'Your existing Salesforce Dev...', 'Recently Viewed | Customer De...', 'Service records | Salesforce', and '- Student'. The main title is 'SETUP > OBJECT MANAGER Service records'. On the left, a sidebar lists options like 'Details', 'Fields & Relationships' (which is selected), 'Page Layouts', 'Lightning Record Pages', etc. The central pane displays the 'Custom Field Definition Detail' for 'Appointment'. Key details include:

- Field Label:** Appointment
- Field Name:** Appointment
- API Name:** Appointment_c
- Description:** (empty)
- Help Text:** (empty)
- Data Owner:** (empty)
- Field Usage:** (empty)
- Data Sensitivity Level:** (empty)
- Compliance Categorization:** (empty)
- Created By:** Surumba K, 9/11/2025, 11:12 PM
- Modified By:** Surumba K, 9/11/2025, 11:12 PM

The 'Lookup Options' section shows 'Related To: Appointment' and 'Related List Label: Service records'. The bottom status bar shows the date as 18-09-2025 and time as 22:12.

Creation of Lookup Field on Billing details and feedback Object :(Service Records)

The screenshot shows the Salesforce Setup interface. The top navigation bar includes tabs for 'Your existing Salesforce Dev...', 'Recently Viewed | Customer De...', 'Billing details and feedback | Sa...', and '- Student'. The main title is 'SETUP > OBJECT MANAGER Billing details and feedback'. On the left, a sidebar lists options like 'Details', 'Fields & Relationships' (which is selected), 'Page Layouts', 'Lightning Record Pages', etc. The central pane displays the 'Custom Field Definition Detail' for 'Service records'. Key details include:

- Field Label:** Service records
- Field Name:** Service_records
- API Name:** Service_records_c
- Description:** (empty)
- Help Text:** (empty)
- Data Owner:** (empty)
- Field Usage:** (empty)
- Data Sensitivity Level:** (empty)
- Compliance Categorization:** (empty)
- Created By:** Surumba K, 9/13/2025, 7:04 AM
- Modified By:** Surumba K, 9/13/2025, 7:04 AM

The 'Lookup Options' section shows 'Related To: Service records' and 'Related List Label: Billing details and feedback (Service records)'. The bottom status bar shows the date as 18-09-2025 and time as 22:15.

Creation of Checkbox Field on Appointment Object :(Maintenance service,Repairs, Replacement Parts)

The screenshot shows the Salesforce Setup interface for creating a custom field. The object selected is 'Appointment'. The field being created is named 'Maintenance service' with the API name 'Maintenance_service__c'. The data type is set to 'Checkbox'. Other details like field label, field name, and description are also visible.

The screenshot shows the Salesforce Setup interface for creating another custom field on the 'Appointment' object. This time, the field is named 'Repairs' with the API name 'Repairs__c'. It is also defined as a 'Checkbox' type.

Creation of Checkbox Field on Service records Object :(Quality Check Status)

The screenshot shows the Salesforce Setup interface. The top navigation bar includes tabs for 'Your existing Salesforce Dev...', 'Recently Viewed | Customer De...', 'Service records | Salesforce', and '- Student'. The URL in the address bar is <https://orgfarm-94e650bc9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000002BR6z/FieldsAndRelationships/00NgK00001hWUF/view>. The page title is 'Service records'. The main content area is titled 'Service records Custom Field Quality Check Status' under 'Object Manager'. The 'Fields & Relationships' tab is selected. The 'Custom Field Definition Detail' section shows the following details:

Field Label	Quality Check Status	Object Name	Service records
Field Name	Quality_Check_Status	Data Type	Checkbox
API Name	Quality_Check_Status__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Surumba K. 9/11/2025, 11:37 PM	Modified By	Surumba K. 9/11/2025, 11:37 PM
General Options	Default Value: Unchecked		

The bottom status bar shows a Windows taskbar with icons for File Explorer, Edge, and File Explorer, along with system status like battery level, signal strength, and date/time (22:26, 18-09-2025).

Creation of Date Field on Appointment Object :(Appointment Date)

The screenshot shows the Salesforce Setup interface. The top navigation bar includes tabs for 'Your existing Salesforce Dev...', 'Recently Viewed | Customer De...', 'Appointment | Salesforce', and '- Student'. The URL in the address bar is <https://orgfarm-94e650bc9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000002BQqr/FieldsAndRelationships/00NgK00001dcRv/view>. The page title is 'Appointment'. The main content area is titled 'Appointment Custom Field Appointment Date' under 'Object Manager'. The 'Fields & Relationships' tab is selected. The 'Custom Field Definition Detail' section shows the following details:

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	Surumba K. 9/11/2025, 11:10 PM	Modified By	Surumba K. 9/11/2025, 11:39 PM
General Options	Required: ✓		
	Default Value		

The bottom status bar shows a Windows taskbar with icons for File Explorer, Edge, and File Explorer, along with system status like battery level, signal strength, and date/time (22:30, 18-09-2025).

Creation of Currency Field on Appointment Object :(Service Amount)

The screenshot shows the Salesforce Setup interface. The top navigation bar includes tabs for 'Your existing Salesforce Dev...', 'Recently Viewed | Customer De...', 'Appointment | Salesforce', and '- Student'. The URL in the address bar is <https://orgfarm-94e650bc9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000002BQqr/FieldsAndRelationships/00NgK00001j7ZI/view>. The main content area is titled 'SETUP > OBJECT MANAGER' and 'Appointment'. On the left, a sidebar lists 'Details' and 'Fields & Relationships' (which is selected). Under 'Fields & Relationships', there are links for 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Limits', 'Record Types', 'Related Lookup Filters', and 'Search Layouts'. The right pane displays the 'Custom Field Definition Detail' for 'Service Amount'. Key details shown include:

Field Label	Service Amount	Object Name	Appointment
Field Name	Service_Amount	Data Type	Currency
API Name	Service_Amount_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Surumba K 9/11/2025, 11:41 PM	Modified By	Surumba K 9/11/2025, 11:41 PM
General Options			
Required	<input type="checkbox"/>		
Default Value			

Creation of Currency Field on Billing details and feedback Object :(Payment Paid)

The screenshot shows the Salesforce Setup interface. The top navigation bar includes tabs for 'Your existing Salesforce Dev...', 'Recently Viewed | Customer De...', 'Appointment | Salesforce', and '- Student'. The URL in the address bar is <https://orgfarm-94e650bc9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000002BRgT/FieldsAndRelationships/00NgK00001igzdh/view>. The main content area is titled 'SETUP > OBJECT MANAGER' and 'Billing details and feedback'. On the left, a sidebar lists 'Details' and 'Fields & Relationships' (which is selected). Under 'Fields & Relationships', there are links for 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Limits', 'Record Types', 'Related Lookup Filters', and 'Search Layouts'. The right pane displays the 'Custom Field Definition Detail' for 'Payment Paid'. Key details shown include:

Field Label	Payment Paid	Object Name	Billing details and feedback
Field Name	Payment_Paid	Data Type	Currency
API Name	Payment_Paid_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Surumba K 9/11/2025, 11:44 PM	Modified By	Surumba K 9/12/2025, 11:18 PM
General Options			
Required	<input type="checkbox"/>		
Default Value			

Creation of Text fields on Appointment :(Vehicle number plate)

The screenshot shows the Salesforce Setup interface. The top navigation bar includes tabs for 'Your existing Salesforce Dev...', 'Recently Viewed | Customer De...', 'Appointment | Salesforce', and a tab for the current page, '- Student'. The URL in the address bar is <https://orgfarm-94e650bc9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000002BQqr/FieldsAndRelationships/00NgK00001ihx6q/view>. The main content area is titled 'Appointment Custom Field' and 'Vehicle number plate'. The 'Custom Field Definition Detail' section shows the following details:

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	Surumba K. 9/11/2025, 11:48 PM	Modified By	Surumba K. 9/11/2025, 11:48 PM
General Options		Required	<input checked="" type="checkbox"/>
		Unique	<input checked="" type="checkbox"/>

The left sidebar lists various setup options under 'Fields & Relationships' such as Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts.

Creation of Text Fields in Billing details and feedback object :(Rating for service)

The screenshot shows the Salesforce Setup interface. The top navigation bar includes tabs for 'Your existing Salesforce Dev...', 'Recently Viewed | Customer De...', 'Billing details and feedback | Sales', and a tab for the current page, '- Student'. The URL in the address bar is <https://orgfarm-94e650bc9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000002BRgT/FieldsAndRelationships/00NgK00001j0NA/view>. The main content area is titled 'Billing details and feedback Custom Field' and 'Rating for service'. The 'Custom Field Definition Detail' section shows the following details:

Field Label	Rating for service	Object Name	Billing details and feedback
Field Name	Rating_for_service	Data Type	Text
API Name	Rating_for_service_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Surumba K. 9/11/2025, 11:51 PM	Modified By	Surumba K. 9/11/2025, 11:51 PM
General Options		Required	<input checked="" type="checkbox"/>
		Unique	<input type="checkbox"/>

The left sidebar lists various setup options under 'Fields & Relationships' such as Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts.

Creation of Picklist Fields in Service records object :(Service Status)

The screenshot shows the Salesforce Setup interface. The top navigation bar includes tabs for 'Your existing Salesforce Dev...', 'Recently Viewed | Customer De...', 'Service records | Salesforce', and '- Student'. The URL in the address bar is <https://orgfarm-94e650bc9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000002BR6z/FieldsAndRelationships/00NgK00001ikJyf/view>. The page title is 'Service records'. The left sidebar under 'Fields & Relationships' has 'Service Status' selected. The main content area displays the 'Custom Field Definition Detail' for 'Service Status'. Key details shown include:

- Field Label:** Service Status
- Field Name:** Service_Status
- API Name:** Service_Status__c
- Description:** (empty)
- Help Text:** (empty)
- Data Owner:** (empty)
- Field Usage:** (empty)
- Data Sensitivity Level:** (empty)
- Compliance Categorization:** (empty)
- Created By:** Surumba K. 9/11/2025, 11:59 PM
- Modified By:** Surumba K. 9/11/2025, 11:59 PM

The right side of the screen shows the 'Object Manager' interface with various objects listed.

Creation of Picklist Fields in Billing details and feedback object :(Payment Status)

The screenshot shows the Salesforce Setup interface. The top navigation bar includes tabs for 'Your existing Salesforce Dev...', 'Recently Viewed | Customer De...', 'Billing details and feedback | Sa...', and '- Student'. The URL in the address bar is <https://orgfarm-94e650bc9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000002BR6z/FieldsAndRelationships/00NgK00001ikJyf/view>. The page title is 'Billing details and feedback'. The left sidebar under 'Fields & Relationships' has 'Payment Status' selected. The main content area displays the 'Custom Field Definition Detail' for 'Payment Status'. Key details shown include:

- Field Label:** Payment Status
- Field Name:** Payment_Status
- API Name:** Payment_Status__c
- Description:** (empty)
- Help Text:** (empty)
- Data Owner:** (empty)
- Field Usage:** (empty)
- Data Sensitivity Level:** (empty)
- Compliance Categorization:** (empty)
- Created By:** Surumba K. 9/12/2025, 12:01 AM
- Modified By:** Surumba K. 9/12/2025, 12:01 AM

The right side of the screen shows the 'Object Manager' interface with various objects listed.

Creation of Formula fields in Service records:(service date)

SETUP > OBJECT MANAGER
Service records

Custom Field
service date

Custom Field Definition Detail

Field Label	Field Name	Object Name
service date	service_date	Service records
Help Text	API Name	
Description	service_date__c	
Data Owner	Field Usage	
Data Sensitivity Level	Compliance Categorization	
Created By	Surumba K. 9/12/2025, 12:04 AM	Modified By
Formula Options	Data Type	Surumba K. 9/12/2025, 12:04 AM
Created Date	Formula	

Validation Rules:

To create a validation rule to an Appointment Object for an : Vehicle

SETUP > OBJECT MANAGER
Appointment

Appointment Validation Rule

Rule Name	Vehicle	Active
Vehicle number plate	REGEX: Vehicle_number_plate__c "[A-Z]{2}[0-9]{2}[A-Z]{2}[0-9]{4}"	<input checked="" type="checkbox"/>
Error Message	Please enter valid number	Error Location
Description		Vehicle number plate
Created By	Surumba K. 9/12/2025, 12:09 AM	Modified By
		Surumba K. 9/13/2025, 8:38 AM

To create a validation rule to an Billing details and feedback object :

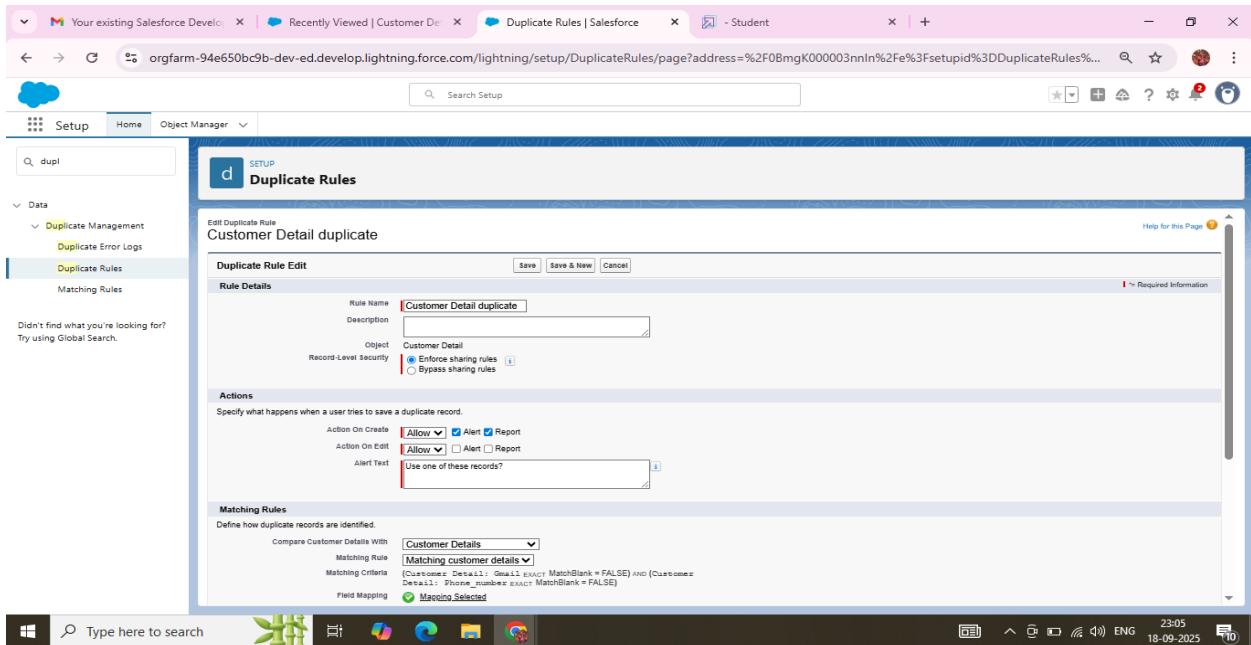
The screenshot shows the Salesforce Setup interface under the Object Manager. A validation rule named "rating_should_be_less_than_5" is being edited. The formula used is NOT(REGEX(Rating_for_service_c , "[1-5]{1}")). A dropdown menu for functions is open, showing options like ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN, etc.

Duplicate Rules:

To create a matching rule to an Customer details Object:

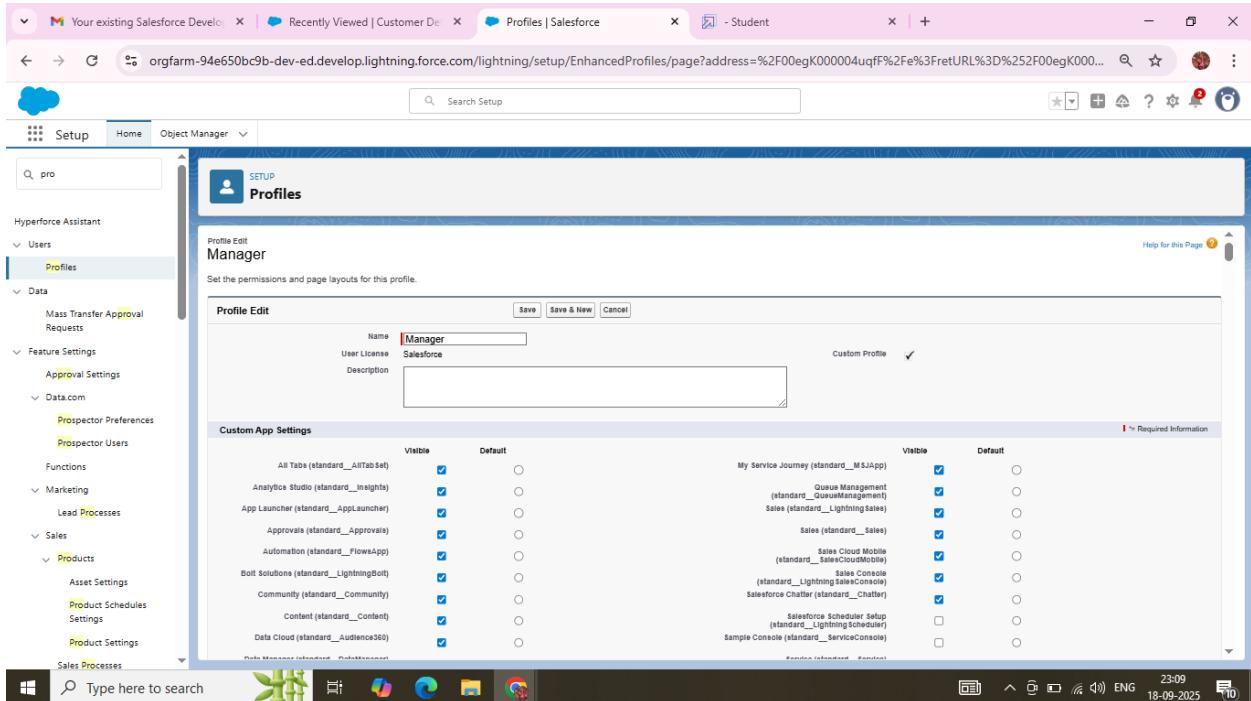
The screenshot shows the Salesforce Setup interface under the Data category, specifically the Matching Rules section. A new rule is being created for the "Customer Detail" object, named "Matching customer details". The matching criteria are defined by comparing fields: "Gmail" (Exact), "Phone number" (Exact), and "Name" (Exact). The logic is set to AND for all criteria.

To create a Duplicate Rule to an Customer details Object:



Profiles:

To create a new profile As Manager :



To create a new profile As Sales Person :

SETUP Profiles

Profile Edit

Name: sales person
User License: Salesforce Platform
Description:

Custom App Settings

Service Provider Access

Tab Settings

Inventory Reservations

Role & Role Hierarchy :

Created a Manager Role and Sales Person under CEO:

SETUP Roles

Creating the Role Hierarchy

Your Organization's Role Hierarchy

- Nandha Institution
 - Add Role
 - CEO
 - CFO
 - COO
 - Manager
 - sales person
 - SVP, Customer Service & Support
 - Add Role
 - Customer Support, International

Users:

Inbox (25) - surumba550@gmail.com | Recently Viewed | Customer Dev | Users | Salesforce | Student

orgfarm-94e650bc9b-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005gK000007YMVA%3Fnoredirect%3D1%26isUserEntityOverride... ☆ 🌐

Cloud Setup Home Object Manager

Search Setup

Users

Niklaus Mikaelson

User Detail

Name	Niklaus Mikaelson	Role	Manager
Alias	nmika	User License	Salesforce
Email	surumba550@gmail.com [Verify]	Profile	Manager
Username	niklaus@mik.com	Active	<input checked="" type="checkbox"/>
Nickname	nmk	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (United States)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	<input type="checkbox"/>

User Profile Help for this Page

Feature Settings Data.com Prospectors Users

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23:32 18-09-2025

Created an Another user Role as Sales Person:

Inbox (25) - surumba550@gmail.com | Recently Viewed | Customer Dev | Users | Salesforce | Student

orgfarm-94e650bc9b-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005gK000007YinQ%3Fnoredirect%3D1%26isUserEntityOverride... ☆ 🌐

Cloud Setup Home Object Manager

Search Setup

Users

tom Kim

User Detail

Name	tom Kim	Role	sales_person
Alias	tkim	User License	Salesforce Platform
Email	surumba550@gmail.com [Verify]	Profile	sales_person
Username	tom@tkim123@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	tkimm	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (United States)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	<input type="checkbox"/>

User Profile Help for this Page

Feature Settings Data.com Prospectors Users

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23:33 18-09-2025

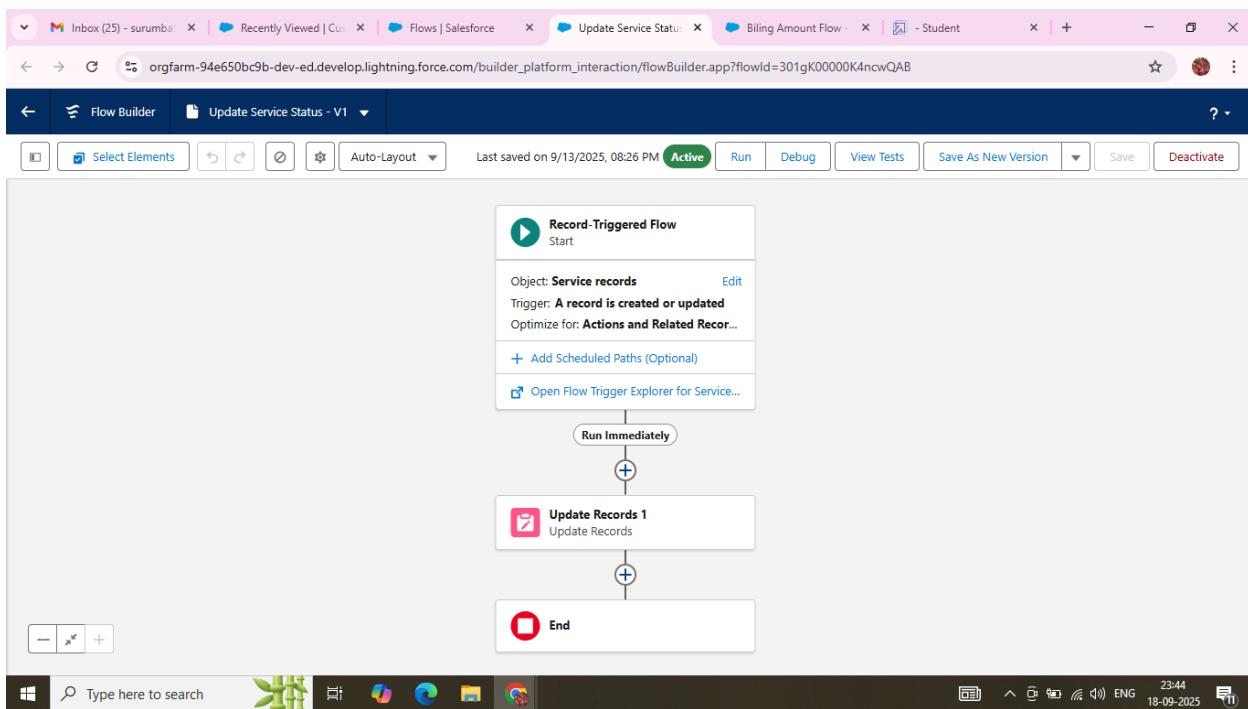
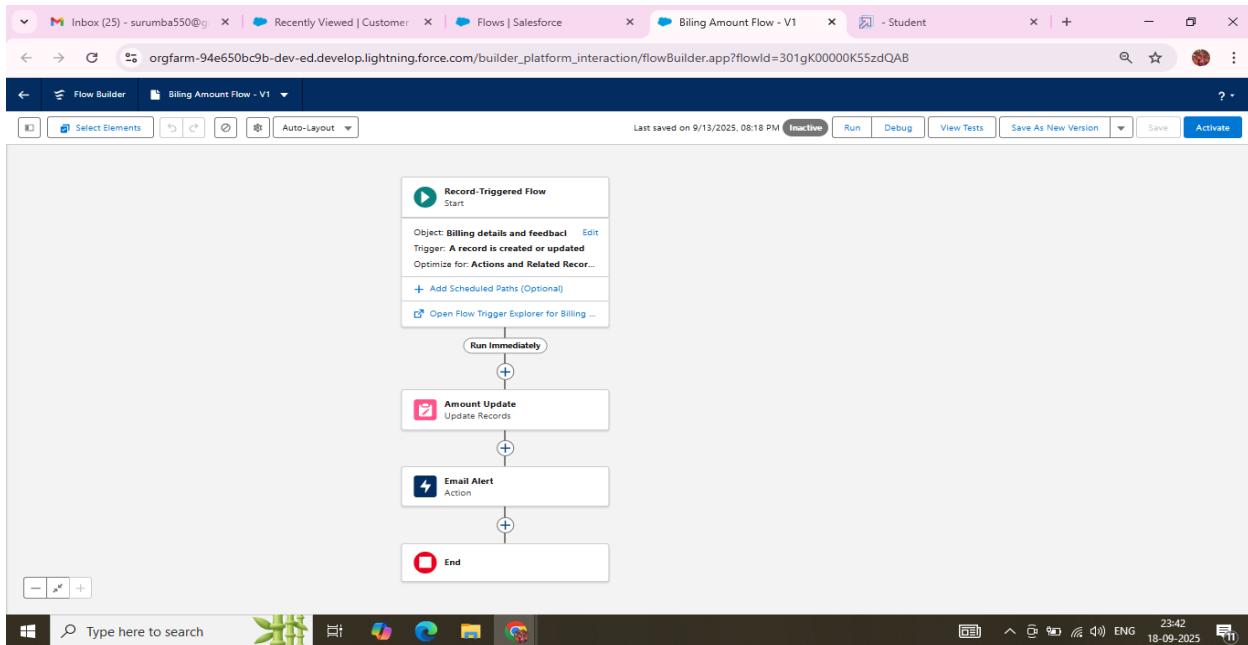
Public Groups:

The screenshot shows the Salesforce Setup interface. The left sidebar is expanded, showing sections like Permission Set Groups, Permission Sets, Profiles, Public Groups (which is selected), Queues, Roles, User Management Settings, and Users. The main content area is titled "Public Groups" and shows a group named "sales team". The group details include a Label ("sales team"), Group Name ("sales_team"), and a checked checkbox for "Grant Access Using Hierarchies". The "Description" field is empty. The "Created By" field shows "Surumba K. 9/12/2025, 2:12 AM" and the "Modified By" field shows "Surumba K. 9/12/2025, 2:12 AM". Below the group details, there is a table with one row, showing a user named "sales_person" with a "Role" column. The bottom status bar shows the date and time as 18-09-2025 23:36.

Sharing Setting:

The screenshot shows the Salesforce Setup interface. The left sidebar is expanded, showing sections like Security (which is selected) and Sharing Settings. The main content area is titled "Sharing Settings" and displays a grid of sharing rules for various objects. The objects listed are Web Cart Document, Work Order, Work Plan, Work Plan Template, Work Step Template, Work Type, Work Type Group, Appointment, Billing details and feedback, Customer Detail, and Service records. Each object has a dropdown menu for sharing settings, with most set to "Private". There are also checkboxes for "Secure guest user" and "Require permission to view record access". The bottom status bar shows the date and time as 18-09-2025 23:40.

Flows:



Apex handler:

The image shows two screenshots of the Salesforce Developer Console interface. Both screenshots have a pink header bar with tabs for 'Your existing Salesforce Dev...', 'Recently Viewed | Customer...', 'Developer Console', and '- Student'. The bottom of each screenshot shows a taskbar with icons for File Explorer, Task View, Start, Taskbar settings, and system status.

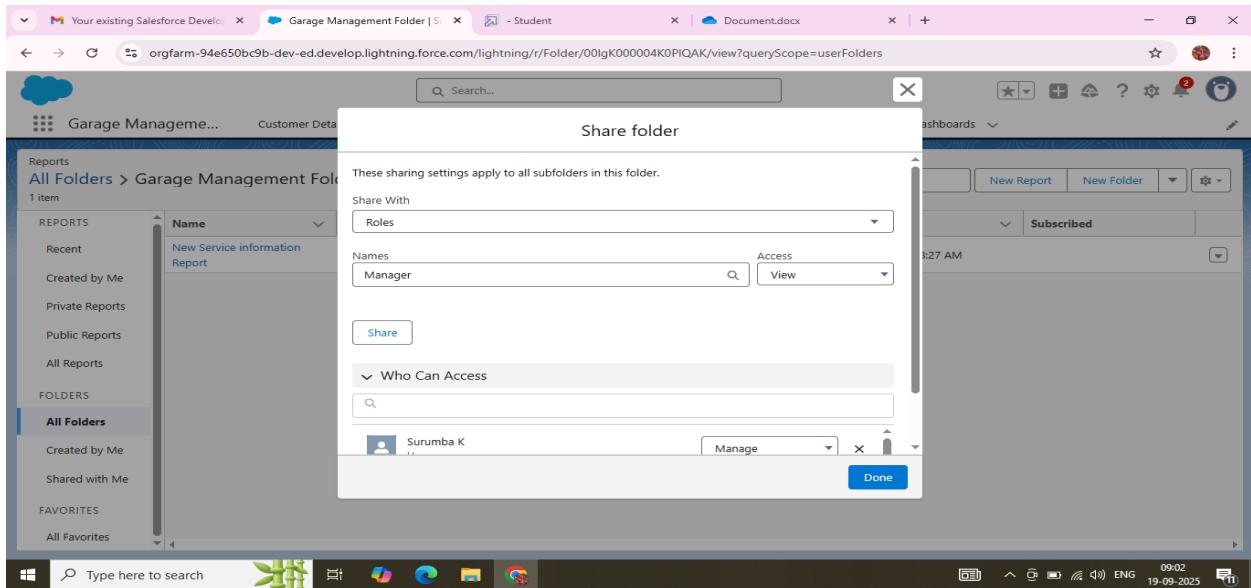
Screenshot 1 (Top): This screenshot displays the code for the class `AmountDistributionHandler`. The code implements a static method `amountDist` that takes a list of `Appointment__c` objects (`listApp`) and returns a list of `Service_record__c` objects (`serList`). The method iterates through the input list, checks conditions based on maintenance and repair flags, and sets the `Service_Amount__c` field for each record accordingly. The conditions are: if both Maintenance_service__c and Repairs__c are true, set `Service_Amount__c` to 10000; if both are false, set it to 5000; otherwise, set it to 8000.

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

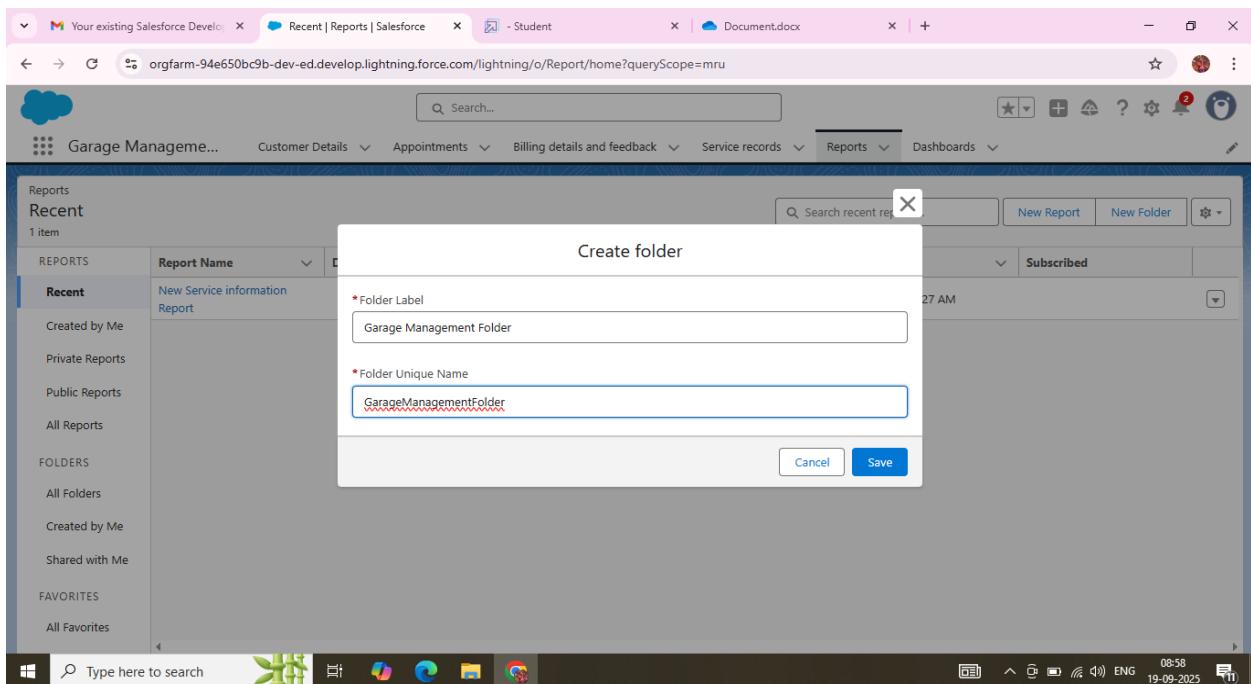
Screenshot 2 (Bottom): This screenshot displays the code for a trigger named `AmountDistribution` on the `Appointment__c` object. The trigger is defined with the `before insert` and `before update` event types. It calls the `amountDist` method from the `AmountDistributionHandler` class, passing the `trigger.new` collection as the input list. The trigger body is enclosed in curly braces.

```
1 trigger AmountDistribution on Appointment__c (before insert, before update) {  
2  
3  
4  
5 if(trigger.isbefore && trigger.isinsert || trigger.isupdate){  
6     AmountDistributionHandler.amountDist(trigger.new);  
7 }  
8  
9  
10 }  
11  
12  
13  
14  
15 }
```

Reports:



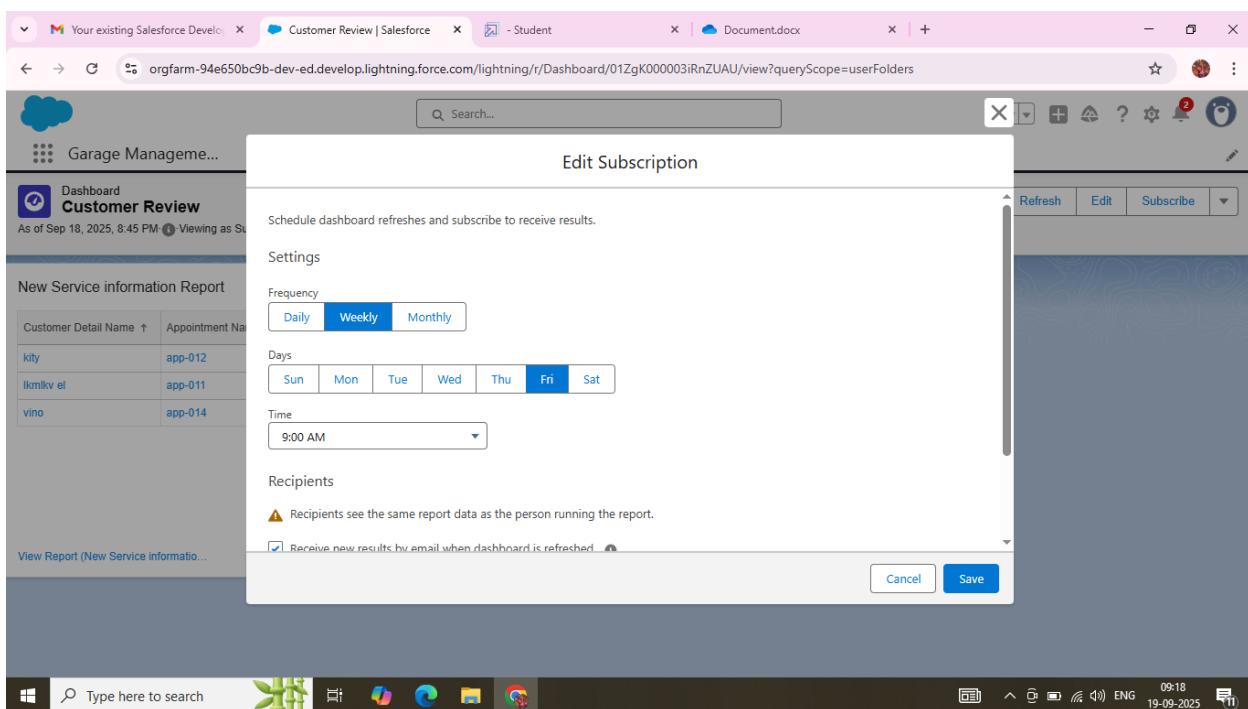
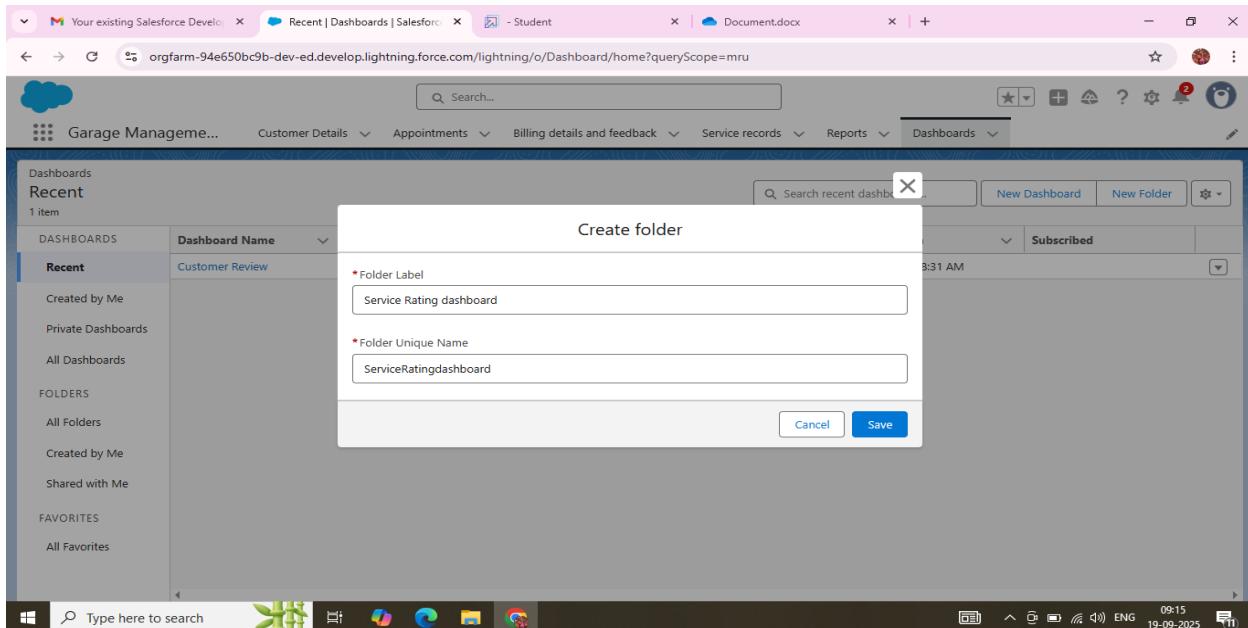
Sharing a report folder:



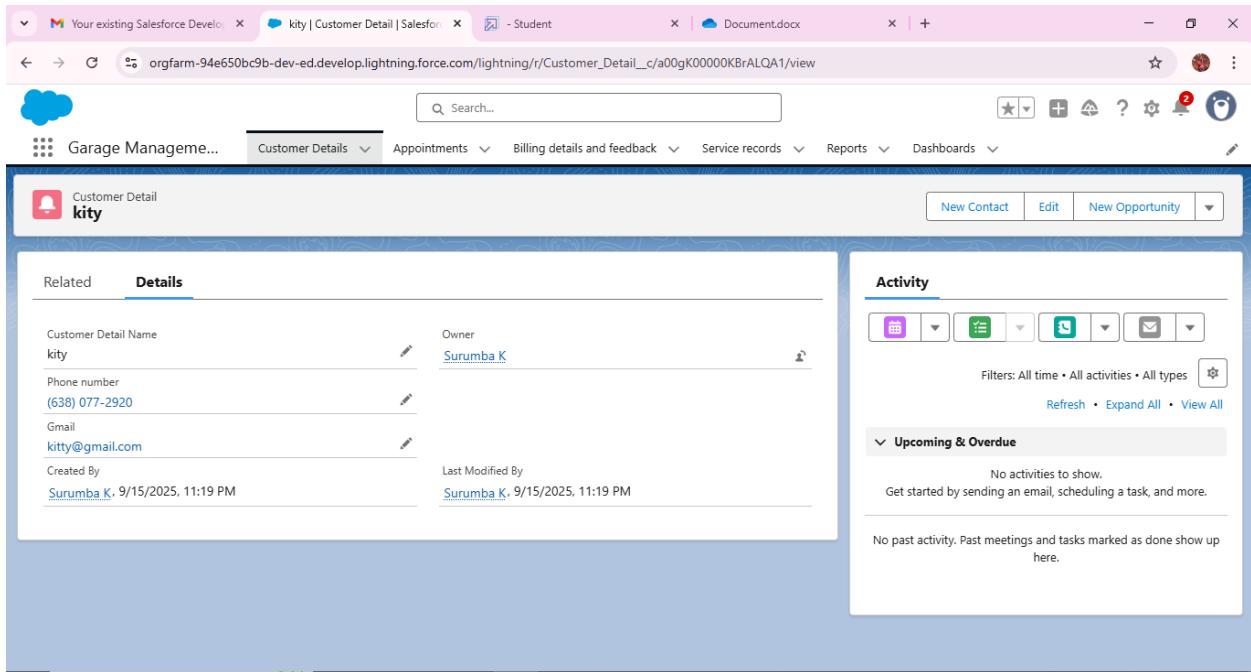
Created Reports in Chart wise:

	Appointment Name	Service records Name
1	app-012	ser-004
2	app-011	ser-003
3	app-014	ser-005
4		

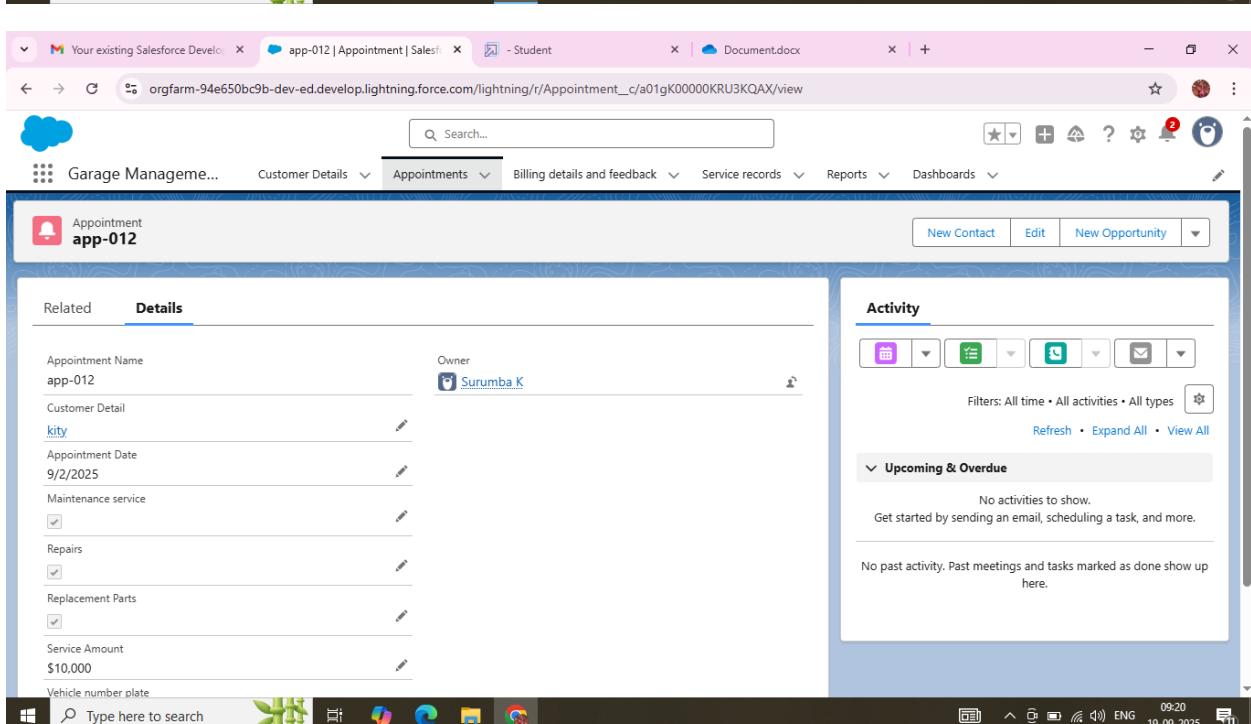
Created Dashboard Folder:



User Adoption :



The screenshot shows a Salesforce Lightning interface for a Customer Detail record named 'kity'. The 'Details' tab is selected, displaying fields such as Customer Detail Name (kity), Phone number ((638) 077-2920), Gmail (kitty@gmail.com), and Created By (Surumba K. 9/15/2025, 11:19 PM). The Owner is listed as Surumba K. The 'Activity' sidebar shows no upcoming or overdue activities.



The screenshot shows a Salesforce Lightning interface for an Appointment record named 'app-012'. The 'Details' tab is selected, displaying fields such as Appointment Name (app-012), Customer Detail (kity), Appointment Date (9/2/2025), and Service Amount (\$10,000). The Maintenance service and Repairs checkboxes are checked. The Owner is listed as Surumba K. The 'Activity' sidebar shows no upcoming or overdue activities.

Your existing Salesforce Dev... ser-005 | Service records | Sales - Student Document.docx

orgfarm-94e650bc9b-dev-ed.develop.lightning.force.com/lightning/r/Service_record_c/a02gK000005LOKbQAO/view

Garage Management

Service records ser-005

Details

Service records Name	ser-005
Appointment	app-014
Quality Check Status	<input checked="" type="checkbox"/>
Service Status	Completed
service date	9/16/2025
Created By	Surumba K. 9/15/2025, 11:41 PM
Owner	Surumba K.
Last Modified By	Surumba K. 9/15/2025, 11:41 PM

Activity

Filters: All time • All activities • All types

No activities to show. Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

Type here to search

19-09-2025 09:21 ENG

Your existing Salesforce Dev... bill-003 | Billing details and feedback - Student Document.docx

orgfarm-94e650bc9b-dev-ed.develop.lightning.force.com/lightning/r/Billing_details_and_feedback_c/a03gK00000AoGIOQAV/view

Garage Management

Billing details and feedback bill-003

Details

Billing details and feedback Name	bill-003
Service record	ser-005
Payment Paid	\$2,000.00
Rating for service	5
Payment Status	Completed
Service records	
Created By	Surumba K. 9/15/2025, 11:42 PM
Owner	Surumba K.
Last Modified By	Surumba K. 9/15/2025, 11:42 PM

Activity

Filters: All time • All activities • All types

No activities to show. Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

Type here to search

19-09-2025 09:22 ENG

