



# Garage Management System Project Document-1

## IDEATION PHASE

### Garage Management System Project

#### Ideation Phase Document

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# Ideation Phase: Brainstorming for Garage Management System

## Goal of Ideation Phase:

To generate clear, actionable ideas for designing a Garage Management System on Salesforce, focused on improving customer experience, staff productivity, inventory management, and overall garage profitability.

### A. Stakeholders (Detailed View)

Customers: Vehicle owners seeking reliable, timely, and transparent service.

Service Advisors: Staff who intake customer requests, explain work, and manage job cards and billing.

Technicians/Mechanics: Perform maintenance and repairs, need clear work orders and parts availability.

Garage Manager/Owner: Oversees daily operations, staff productivity, profitability.

Inventory Managers: Ensure spare parts availability, manage supplier orders.

Billing & Accounts Staff: Handle invoices, payments, outstanding balances.

Spare Parts Suppliers: External vendors integrated for part orders.

### B. Core Features

Customer Management

Personal and vehicle details (VIN, model, history).

Service history and loyalty programs.

Preferred communication channels.

### Service Booking and Scheduling

Online/phone/in-person booking.

Integrated calendar for workshop bays.

Automated confirmations and reminders.

### Job Card Management

Create/assign job cards.

Include diagnostics, labor hours, tasks.

Real-time status updates (Created → In Progress → Completed).

### Inventory Management

Track parts with part numbers and quantities.

Low-stock alerts and supplier ordering.

Integration with suppliers for orders.

## Invoicing and Billing

Auto-generate invoices from job cards.

Support discounts, loyalty points.

Integration with payment gateways.

## Payment Tracking

Record payments (cash, card, digital).

Manage outstanding balances.

## Communication Automation

SMS/Email for reminders, status updates, surveys.

Personalized messages and promotions.

## Technician Assignment and Tracking

Assign work based on skills and availability.

Monitor performance and efficiency.

Reporting and Analytics

Service volume trends.

Revenue and billing reports.

Inventory usage and restocking needs.

Technician productivity dashboards.

### **C. Salesforce Capabilities to Leverage**

Standard Objects (Accounts, Contacts, Cases).

Custom Objects (Vehicle, Job Card, Service Booking, Inventory Item).

Flows for automated reminders and approvals.

Process Builder for automated workflows.

Salesforce Mobile App for technicians.

Reports and Dashboards for managers.

Integration with Email/SMS providers.

Payment gateway integration.

### **D. Pain Points to Solve (Expanded)**

Manual records lead to errors and lost data.

Customers frustrated with unclear timelines and surprise costs.

Inventory shortages delay repairs.

Poor communication between advisors, technicians, and customers.

Manual billing is slow and error-prone.

Managers lack real-time insights for decision-making.

### **E. Opportunities for Innovation**

Customer self-service portal with booking and history.

Digital check-in with QR code.

Predictive inventory alerts.

Automated, personalized service reminders.

Technician performance dashboards for incentives.

Integrated online payment options.

Paperless records and digital invoicing

# Empathy Map Phase

Empathy maps clarify user perspectives to design better solutions.

## A. Customer (Vehicle Owner)

Says "When will my car be ready?" "How much will it cost?" "Please keep me updated."

Thinks "Will they overcharge me?" "Did they do a good job?" "I need my car on time."

Does Schedules service, waits/calls for updates, pays bill.

Feels Anxious about cost/time, worried about quality, relieved if satisfied.

## Needs:

Transparency in costs and timelines.

Easy booking and updates.

Service history access.

Reliable communication.

## Features to Help:

Online portal.

SMS/Email updates.

Digital service records.



## **B. Service Advisor**

Says "Let's check your service history." "We'll call you when ready."

Thinks "Do we have this part?" "Avoid billing errors."

Does Takes bookings, manages job cards, communicates with customers.

Feels Pressured when busy, wants smooth operations.

### Needs:

Quick access to records.

Inventory visibility.

Easy billing process.

### Features to Help:

Centralized CRM data.

Inventory integration.

Automated invoicing.

## **C. Technician/Mechanic**

Says "What's assigned to me?" "Is the part available?"

Thinks "Too many jobs today." "Hope the job card is correct."

Does Repairs/maintenance, updates job status.

Feels Frustrated if delays, proud when recognized.

✓ Needs:

Clear work orders.

Real-time part availability.

Mobile access to job cards.

✓ Features to Help:

Mobile app.

Inventory tracking.

Easy job card updates.

📌 **D. Garage Manager**

Says "What's our revenue today?" "How many cars serviced?"

Thinks "Are customers happy?" "Is inventory under control?"

Does Reviews reports, manages staff, approves purchases.

Feels Responsible for performance and profitability.

✓ Needs:

Accurate reporting.

Staff performance tracking.

Inventory control.

 Features to Help:

Dashboards.

Automated alerts.

Customer feedback integration.

# Problem Statement

## **Background:**

Many garages rely on fragmented or manual systems. This leads to lost records, errors, poor customer communication, inventory problems, billing mistakes, and limited insights for management.

## **Key Challenges:**

Manual records prone to errors and loss.

Lack of real-time service updates for customers.

Inventory shortages delaying repairs.

Fragmented communication between staff.

Slow, error-prone billing process.

No holistic view for management planning.

## **Vision:**

A Salesforce-powered Garage Management System to digitize, automate, and integrate service workflows—improving customer experience, operational efficiency, and business decision-making.

## **Objectives:**

Centralized customer and vehicle database.

Streamlined service booking and scheduling.

Automated job card management.

Real-time inventory tracking with alerts.

Quick, accurate billing with payment tracking.

Automated, branded customer communication.

Mobile support for technicians.

Detailed reporting and dashboards for management.

Expected Benefits:

Shorter service times.

Fewer errors in records, billing, and inventory.

Higher customer satisfaction and loyalty.

Increased staff productivity.

Better inventory turnover.

Data-driven planning and decision-making.

## Document Summary

This document includes:

- ✓ **Ideation Phase:** Detailed brainstorming with stakeholders, features, pain points, and innovation opportunities.
- ✓ **Empathy Map:** Expanded views of Customer, Service Advisor, Technician, and Manager needs.
- ✓ **Problem Statement:** Clear definition of challenges, vision, objectives, and expected benefits.