

PROJECT REPORT

# GARAGE MANAGEMENT SYSTEM (Sales Force)

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INTRODUCTION

Salesforce is a cloud-based customer relationship management (CRM) platform that enables businesses to manage sales, marketing, and customer service activities in a single platform. It provides tools for sales teams to track leads, manage accounts, and forecast sales, as well as marketing automation and customer service capabilities. Salesforce is highly customizable and scalable, making it a popular choice for businesses of all sizes. Its features include:

* Contact and account management
* Sales forecasting and pipeline management
* Marketing automation
* Customer service and support
* Analytics and reporting
* Integration with other business applications

Salesforce is widely used across various industries, and its platform is constantly evolving with new features and innovations. Lease Management is a critical function in the real estate and property rental industry, involving the administration of lease agreements, rent payments, tenant communication, document handling, and property maintenance. Traditional lease management processes are often manual, fragmented, and prone to delays or errors.

**Salesforce**, as a robust and customizable cloud platform, offers a comprehensive solution to digitalize and automate lease management workflows. By leveraging Salesforce's CRM capabilities along with its automation, reporting, and integration tools, businesses can streamline lease lifecycle activities — from inquiry to renewal or termination.

**Key Objectives of Lease Management in Salesforce:**

* + Centralize all lease data, tenant details, and property information in one place.
  + Automate lease approvals, renewal reminders, and payment tracking using Flow Builder and Process Automation tools.
  + Enable secure digital signing of lease agreements through integrations like DocuSign or Adobe Sign.
  + Provide tenants with self-service access via Experience Cloud portals.
  + Track maintenance requests and resolve service issues using Salesforce Service Cloud.
  + Generate real-time reports and dashboards for lease performance, occupancy, and revenue. **Benefits of Using Salesforce for Lease Management:**
  + **Increased Efficiency:** Eliminates manual paperwork and reduces process delays.
  + **Improved Accuracy:** Validations and automated workflows minimize human error.
  + **Real-Time Visibility:** Dashboards and analytics provide actionable insights.
  + **Enhanced User Experience:** Tenants and managers benefit from mobile-friendly, intuitive interfaces.
  + **Compliance & Security:** Salesforce ensures data protection, audit trails, and regulatory compliance.

Salesforce transforms traditional lease management into a scalable, digital-first process — making it ideal for property managers, leasing agents, and real estate firms aiming for operational excellence.

Project Overview

Objective: Develop a customized Salesforce application to manage leases, track lease agreements, and automate lease-related processes for a real estate company.

Key Features:

1. Lease Agreement Management: Store and manage lease agreements, including lease terms, rent, and security deposits.
2. Lease Tracking: Track lease start and end dates, renewal options, and notice periods.
3. Rent Management: Manage rent payments, payment schedules, and late payment fees.
4. Lease Renewal and Termination: Automate lease renewal and termination processes, including notifications and reminders.
5. Reporting and Analytics: Generate reports on lease performance, rent payments, and lease expirations.

Salesforce Features Used:

1. Custom Objects: Create custom objects for Lease Agreements, Rent Payments, and Lease Terms. 2. Workflows and Approvals: Automate lease approval and renewal processes using workflows and approvals.

1. Triggers and Validation Rules: Use triggers and validation rules to enforce data consistency and accuracy.
2. Dashboards and Reports: Create custom dashboards and reports to provide insights into lease performance and rent payments.

Benefits:

1. Improved Lease Management: Streamline lease management processes and reduce administrative burdens.
2. Enhanced Visibility: Provide real-time visibility into lease agreements, rent payments, and lease performance.
3. Increased Efficiency: Automate lease-related processes, reducing manual errors and increasing productivity.

Technical Requirements:

1. Salesforce Platform: Develop the application on the Salesforce platform, using Salesforce DX and Lightning components.
2. Data Migration: Migrate existing lease data from legacy systems to Salesforce.
3. Integration: Integrate the Lease Management System with other Salesforce applications, such as Sales Cloud and Service Cloud.

Deliverables:

1. Customized Salesforce Application: Develop a customized Salesforce application for lease management.
2. Data Migration: Migrate existing lease data to Salesforce.
3. User Training: Provide user training and documentation for the Lease Management System.

Garage Management System Project Document-1

IDEATION PHASE

**Garage Management System Project**

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**Ideation Phase Document**

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• Ideation Phase: Brainstorming

* Empathy Map
* Problem Statement
* Document Summary

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.

**Garage Management System**

**Phase 2: Requirement Analysis**

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1. Customer Journey Map

The customer journey map outlines the end-to-end experience a customer goes through when interacting with the Garage Management System. It highlights customer interactions, touchpoints, expectations, and the system’s response at each phase.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Stage** | **Customer Action** | **Touchpoints** | **Customer Experience** | **System**  **Interaction** |
| Aware ness | Learns about garage via ads/web search | Website,  Social Media,  Google | Curious, looking for reliable service | Homepage viewed, SEO-triggered |
| Bookin  g | Books an appointment for service | Mobile App / Website / Call | Easy, fast booking desired | Appointment form submission, confirmation |
| Arrival  &  Check-  in | Brings vehicle to garage | Front Desk / Reception | Quick check-in and  expected wait time clarity | System logs vehicle and service request |
| Service | Vehicle is serviced | Mechanic updates via system/app | Wants real-time updates and transparency | Service status updated in realtime |
| Payme  nt | Makes payment post-service | App / POS / Invoice email | Needs clear billing and smooth payment process | Invoice generated, payment processed |
| Feedb ack | Provides rating and comments | App / Website / SMS link | Opportunity to improve loyalty | Feedback stored for analytics |
| Return /Repea  t | Returns for next service | App reminder / Email / SMS | Seeks reliable followup and reminders | Notification scheduled and sent |

**2.Data Flow Diagram (DFD) – Level 1**

The DFD illustrates how data flows through the system, showing interactions between the user and major system modules.

**Entities and Processes:**

* **Customer:** Initiates appointments, provides feedback, makes payments.
* **Booking Module:** Captures booking details and schedules service.
* **Garage Scheduler:** Assigns jobs to available mechanics.
* **Service Module:** Handles the actual service updates and logs.
* **Payment & Billing:** Processes payment and generates invoices.
* **Feedback Module:** Captures ratings and comments.
* **Notification System:** Sends reminders and status updates.
* **Mechanic Panel:** Allows mechanics to view and update their tasks.

**DFD Representation (Textual):**

***+-------------------+ +------------------+ +--------------------+***

***| | | | | |******| Customer +----->+ Booking Module +----->+ Garage Scheduler |******| | | | | |******+-------------------+ +------------------+ +--------------------+***

***| |*** ***v v***

***+------------------+ +---------------------+ +--------------------+***

***| Feedback Module |<----+ Payment & Billing +<----+ Service Module |***

***+------------------+ +---------------------+ +--------------------+***

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***| Notification |<-------------------------------***

***-------+ Mechanic Panel***

***+-------------------+***

***+-------------------+***

3. Solution Requirements

1. ***Functional Requirements***• **Customer Interface:**
   * + Book, view, reschedule, or cancel appointments.
     + View service history and payment records.
     + Receive SMS/email alerts for upcoming services.
     + Submit feedback and ratings post-service.
   * **Admin Interface:**
     + Add/edit/delete service categories. o Assign jobs to mechanics and manage availability.
     + View analytics dashboards (service trends, customer feedback).
   * **Mechanic Interface:**
     + View assigned jobs for the day. o Update status (in progress, completed).
     + View service instructions and vehicle history.
   * **Billing & Payment:**
     + Auto-generate invoices upon service completion. o Accept online payments (UPI, credit/debit cards).
     + Record offline payments (cash/cheque).
   * **Notifications:**
     + Reminders for upcoming appointments. o Status updates during service progress.
     + Payment confirmation and feedback requests.
2. ***Non-Functional Requirements***
   * **Usability:** Easy-to-use UI for all user types.
   * **Security:** Role-based access control, secure payment gateway.
   * **Performance:** System should respond within 2 seconds for any operation.
   * **Scalability:** Capable of supporting multiple garage locations.
   * **Availability:** 99.9% uptime with minimal maintenance windows.

4. Technology Stack

**Layer** **Technology Choices**

|  |  |
| --- | --- |
| **Frontend (UI)** | React.js / Angular for web; Flutter/React Native for mobile |
| **Backend (API)** | Node.js with Express.js / Django / Spring Boot |
| **Database** | MySQL / PostgreSQL for relational data |
| **Authentication** | Firebase Auth / JWT-based login / OAuth2 |
| **Payment Gateway** | Razorpay / Stripe / PayPal |
| **Notification System** | Twilio (SMS), SendGrid (Email), Firebase Cloud Messaging |
| **Deployment** | AWS (EC2, RDS), Azure, Heroku, or Firebase Hosting |
| **Version Control** | Git + GitHub/GitLab for source control |
| **Monitoring & Logs** | New Relic / LogRocket / Sentry for error tracking |
| **Analytics** | Google Analytics / Custom-built admin dashboard |

This technology stack ensures a secure, scalable, and responsive garage management solution catering to both customers and internal staff.

Garage Management System

Phase 3: Project Design Phase

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**Problem-Solution Fit**

***A. Identified Problems***

1. **Manual Job Scheduling** o Technicians are assigned work manually, which causes scheduling conflicts and inefficiencies. o Service managers face difficulties in managing peak hours and technician availability.
2. **Inventory Mismatches** o No real-time tracking of spare parts and consumables. o Stock-outs during service operations result in delays and customer dissatisfaction.
3. **Customer Communication Gaps**
   * Customers are not kept updated on the status of their service requests. o Lack of communication regarding estimated costs, service duration, and delivery dates.
4. **Billing Errors** o Manual generation of bills leads to calculation errors.
   * Lack of integration with digital payment systems affects timely payments.
5. **Operational Visibility and Performance Monitoring** o Garage managers lack a centralized dashboard to monitor daily operations.
   * No real-time data analytics to evaluate service quality, staff efficiency, or inventory turnover.

*B. Need for a Solution*

* To enhance operational efficiency and reduce manual dependency.
* To deliver transparent and effective communication to customers.
* To ensure accurate billing and effective inventory management.
* To provide a scalable and integrated digital platform for garage operations.

**Proposed Solution**

An integrated, AI-powered **Garage Management System (GMS)** tailored to handle day-today garage operations. The solution will be modular and cloud-based, offering high scalability, availability, and performance.

1. *Customer Module* 
   * Online appointment scheduling
   * Service tracking and updates via SMS, Email, and App notifications
   * Digital access to service history, invoices, and vehicle maintenance records
2. *Job Management Module* 
   * AI-assisted auto-scheduling based on technician availability and skill
   * Digital job cards for each vehicle with timestamped logs
   * Monitoring of job progress and technician productivity
3. *Inventory Management Module* 
   * Real-time updates on part usage and availability
   * Automated low-stock alerts and reorder triggers
   * Supplier integration for purchase orders
4. *Billing & Payments Module* 
   * Auto-calculation of service charges, taxes, and discounts
   * Digital invoicing and secure payment options (UPI, Cards, Wallets)
   * Refunds and adjustment management
5. *Admin Dashboard & Reports* 
   * Visual dashboards for daily revenue, job status, and performance
   * Analytical reports on technician efficiency, customer feedback, and inventory trends
   * User management and access control for multi-role login (Admin, Technician, Customer)
6. *Customer Support and Feedback* 
   * Chatbot integration for 24/7 basic queries
   * Post-service feedback forms and service rating system

**Solution Architecture**

The Garage Management System will follow a modular, layered architecture for flexibility, maintainability, and security.

1. *Presentation Layer (Frontend)* 
   * Developed using **React.js** or **Angular** for responsive UI
   * Separate interfaces for customers, technicians, and administrators
   * Supports desktop, tablet, and mobile devices
2. *Application Layer (Backend)* 
   * Built using **Node.js**, **Django**, or **Spring Boot**
   * Handles business logic, API endpoints, and microservices
   * Integration with third-party services for SMS, email, payments, etc.
3. *Database Layer* 
   * **Relational Database (MySQL/PostgreSQL)**: Stores structured data like users, jobs, inventory, billing records
   * **NoSQL Database (MongoDB)**: Stores logs, user sessions, analytics data
   * Periodic backups and disaster recovery setup
4. *AI/Automation Layer* 
   * **AI Models for:**
     + Predicting service time based on historical data
     + Spare parts demand forecasting o Technician job allocation
   * **Automation Bots:**
     + Notification dispatch (reminders, alerts) o Invoice generation and feedback collection
5. *Notification and Communication Layer* 
   * **SMS Gateway** (Twilio, Textlocal)
   * **Email Services** (SendGrid, Mailgun)
   * **Push Notifications** for app users
   * In-app alerts and updates
6. *Integration Layer* 
   * Payment gateways (Razorpay, Stripe, Paytm)
   * CRM or ERP systems if needed
   * Diagnostic tool integration for smart garages
7. *Security Layer* 
   * **Authentication:** JWT-based login, password encryption
   * **Authorization:** Role-Based Access Control (RBAC)
   * **Data Protection:** AES-256 encryption for critical data
   * **Audit Logs:** For all critical activities and changes
   * **Secure APIs:** HTTPS with OAuth 2.0 standards
   * **Garage Management System**
   * **Phase 4: Project Planning Phase**

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* + **Project Objectives**
  + The main objective of the Project Planning Phase is to outline how the Garage Management System will be implemented using Salesforce development tools and methodologies. This phase defines the roadmap, resource allocation, timeline, risk analysis, and development practices.
  + **Project Scope**
  + **Platform:** Salesforce CRM and Salesforce Platform (Lightning Components, Apex, Visualforce)
  + **Modules to be Developed:**
  + o Customer Management o Job Card and Technician Assignment o Inventory and Spare Parts Tracking o Billing and Payments o Dashboard and Reports
  + **Users:** Admin, Technicians, Inventory Manager, Customers
  + **Device Support:** Desktop and Mobile via Salesforce Mobile App
  + **Roles and Responsibilities**
  + Role Responsibility
  + Project Manager Oversee overall project, scheduling, and QA
  + Salesforce Developer Build Apex classes, triggers, LWC components
  + Admin Configure objects, workflows, and automation
  + QA/Test Engineer Perform functional and integration testing
  + UI/UX Designer Design intuitive, responsive interfaces
  + **Work Breakdown Structure (WBS)**
  + **Phase 1: Environment Setup and Custom Object Creation** - Set up Salesforce Developer Org - Create custom objects: Job, Vehicle, Service History, Parts, Technician
  + **Phase 2: UI Development (Lightning Web Components)** - Appointment Booking LWC - Job Card Generation UI - Inventory Management Screens - Billing Page and Dashboard Components
  + **Phase 3: Backend Logic (Apex Development)** - Apex triggers for stock updates, service logging - Batch classes for inventory checks - Scheduled classes for notifications
  + **Phase 4: Automation (Process Builder / Flow)** - Auto-email reminders for appointments -
  + Auto-assignment of technician - Update inventory automatically after job completion **Phase 5: Testing & QA** - Unit testing of Apex classes and components - Integration testing for workflow execution - UAT with test users
  + **Phase 6: Deployment** - Metadata deployment via Change Sets - Final sandbox testing - Deployment to production org
  + **Timeline and Milestones**

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| * + Milestone Duration   + Requirements Review 2 Days   + Org Setup and Object Modeling 3 Days   + UI and Apex Development 10 Days   + Automation & Workflows 5 Days   + Testing and Bug Fixes 5 Days   + Final Deployment 2 Days   + Total Estimated Duration: **~27 Days** |

* + **Tools and Technologies**
  + **Salesforce Platform:** Lightning App Builder, Flow Builder, Apex, LWC
  + **Version Control:** GitHub
  + **Testing:** Apex Test Classes, Salesforce DX
  + **Project Tracking:** Jira or Trello (Kanban Board)
  + **Deployment:** Change Sets, Salesforce CLI (SFDX)
  + **Risk Management Plan**
  + Risk Mitigation Strategy
  + Apex governor limit breaches Optimize queries and use bulk-safe operations
  + Delay in UI delivery Agile sprint planning with daily standups
  + Deployment issues Use sandbox testing and validated change sets
  + User adoption challenges Provide training and user manuals
  + **Deliverables**
  + Salesforce Custom Objects and Schema
  + Lightning Web Components for UI
  + Apex Logic and Automation Scripts
  + Test Cases and QA Reports
  + Deployment Package
  + User Documentation and Admin Guide
  + **Conclusion**
  + This planning document outlines the structured approach to implement a Garage Management System on the Salesforce platform. With clear timelines, roles, and deliverables, the project ensures high-quality outcomes aligned with business goals.
  + GARAGE MANAGEMENT SYSTEM
  + PHASE-5

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**Summary**

This design phase clearly aligns the solution with the identified problems, offering a robust and scalable Garage Management System architecture that ensures better customer service, operational efficiency, and intelligent business insights. The next phase will focus on implementation planning and prototyping.

## 1.LOGIN AND NAVIGATION

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