

GARAGE MANAGEMENT SYSTEM

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College Code: brubd

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INTRODUCTION:

A Garage Management System in Salesforce is designed to streamline automotive service operations, improve customer experience, and enhance efficiency. It leverages Salesforce's CRM capabilities to manage appointments, vehicle records, billing, and inventory in one centralized platform. This system ensures workshops can track vehicles from check-in to delivery with full visibility. Customers benefit from timely updates, digital service history, and improved communication channels. With automated reminders, the system reduces missed appointments and boosts customer retention. Salesforce enables mechanics and managers to collaborate seamlessly with real-time data access. Parts inventory is tracked efficiently to prevent delays in service. Service advisors can generate accurate quotations and invoices instantly. Custom dashboards provide insights into revenue, workload, and customer satisfaction. Integration with mobile apps allows technicians to update job status directly from the workshop floor.

The system supports predictive maintenance through scheduled reminders and data analytics. Managers can track technician productivity and identify skill gaps. Integration with payment systems simplifies financial operations. Cloud-based access ensures anytime, anywhere management of workshop activities. Overall, the Garage Management System in Salesforce delivers a smart, customer-centric solution for modern automotive service centers.

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First name: Balamurugan ✓ Last name: V ✓

Job title: Developer ✓ Work email: chandrukumar51198 ✓

Company: Shree venkateshwara ✓ Country/Region: India ✓

Your org may be provisioned on or migrated to Hyperforce, Salesforce's public cloud infrastructure.

☒ I agree to the Main Services Agreement - Developer Services and Salesforce Program Agreement. I acknowledge, as described in the Developer Documentation: (1) the Developer Edition includes autonomous and other generative AI features; and (2) Salesforce may limit use of those features and the org, and may terminate any org that has been inactive for 45 days.

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Object:

Manages vehicles, services, and appointments. *Vehicle* objects store vehicle details, *Service* objects define services offered, and *Appointment* objects schedule vehicle services. The system provides methods to add, view, and manage these objects efficiently.

Create Customer Details Object:

SETUP > OBJECT MANAGER

Customer Detail

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Details

Description

API Name: Customer_Detail__c

Custom: ✓

Singular Label: Customer Detail

Plural Label: Customer Details

Enable Reports: ✓

Track Activities: ✓

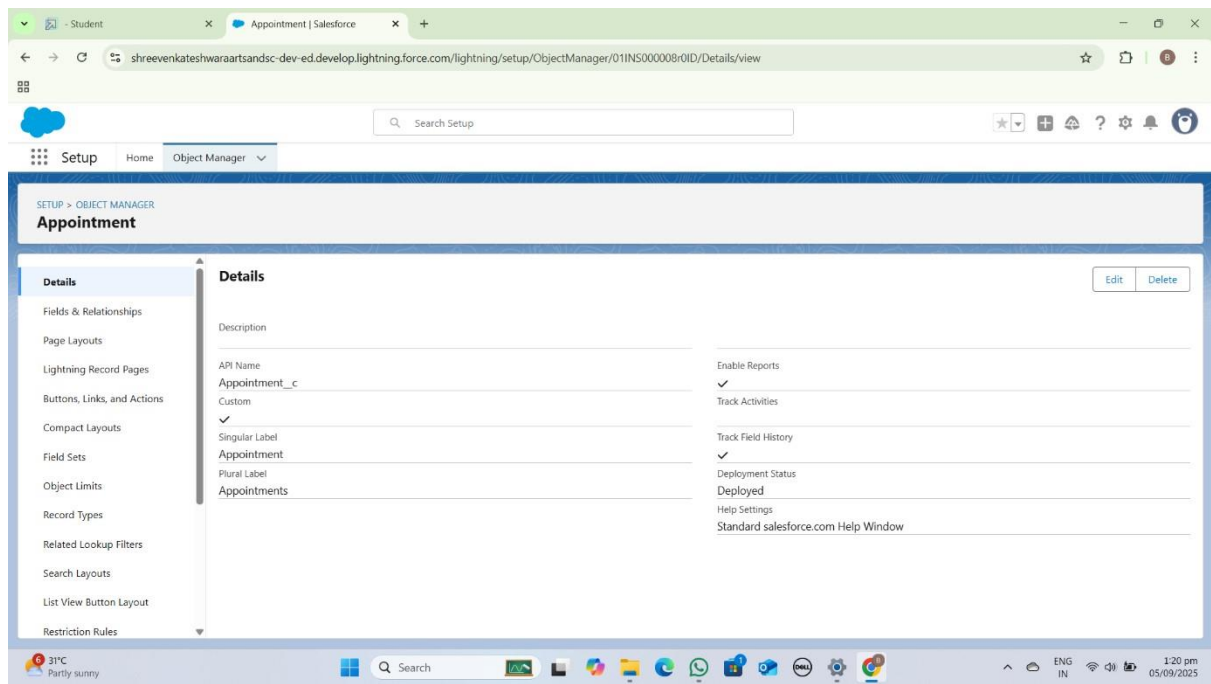
Track Field History: ✓

Deployment Status: Deployed

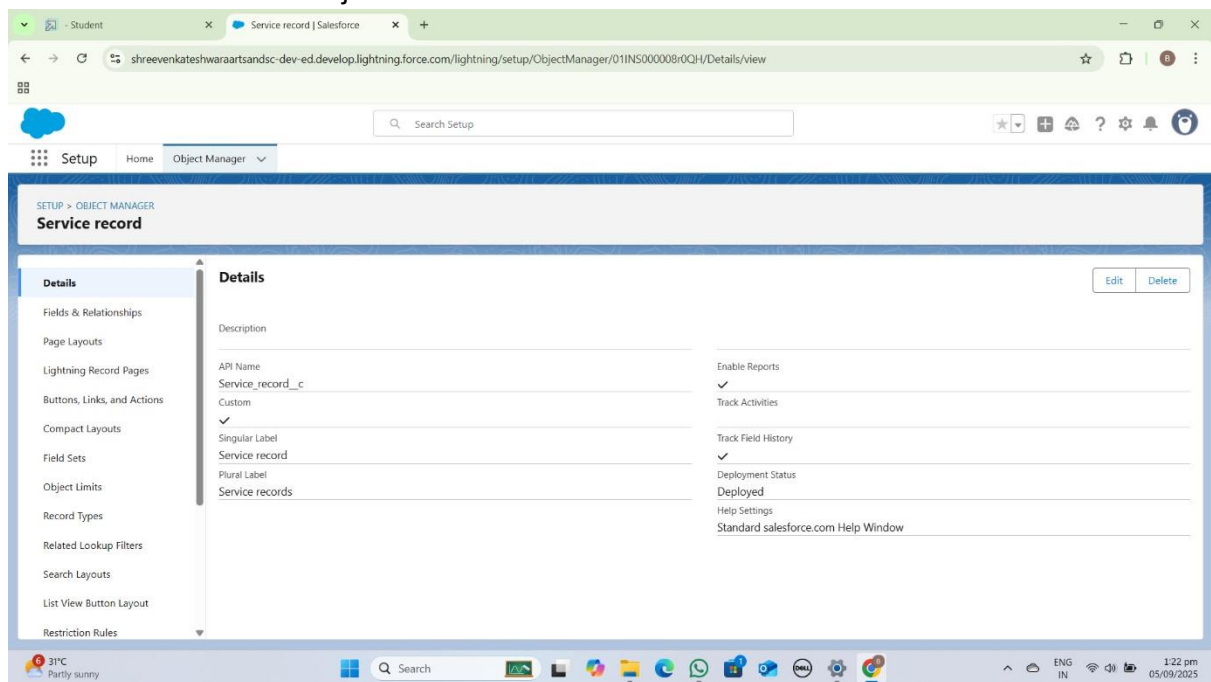
Help Settings

Standard salesforce.com Help Window

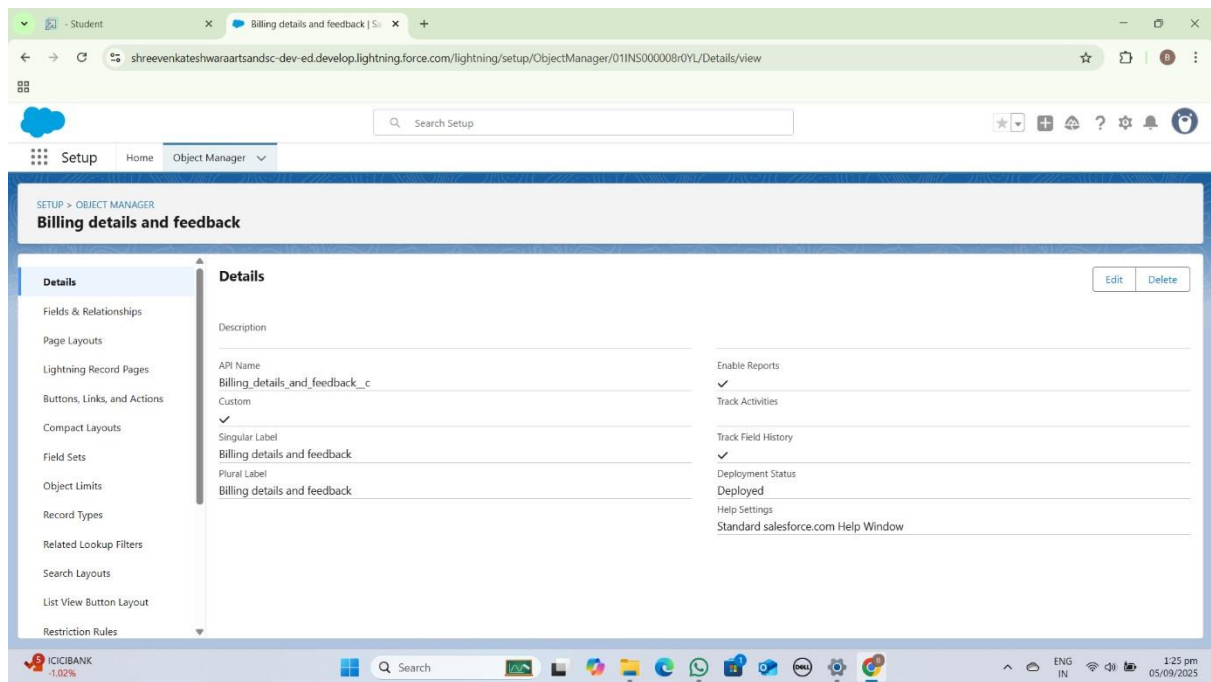
Create Appointment Object:



Create Service Record Object:



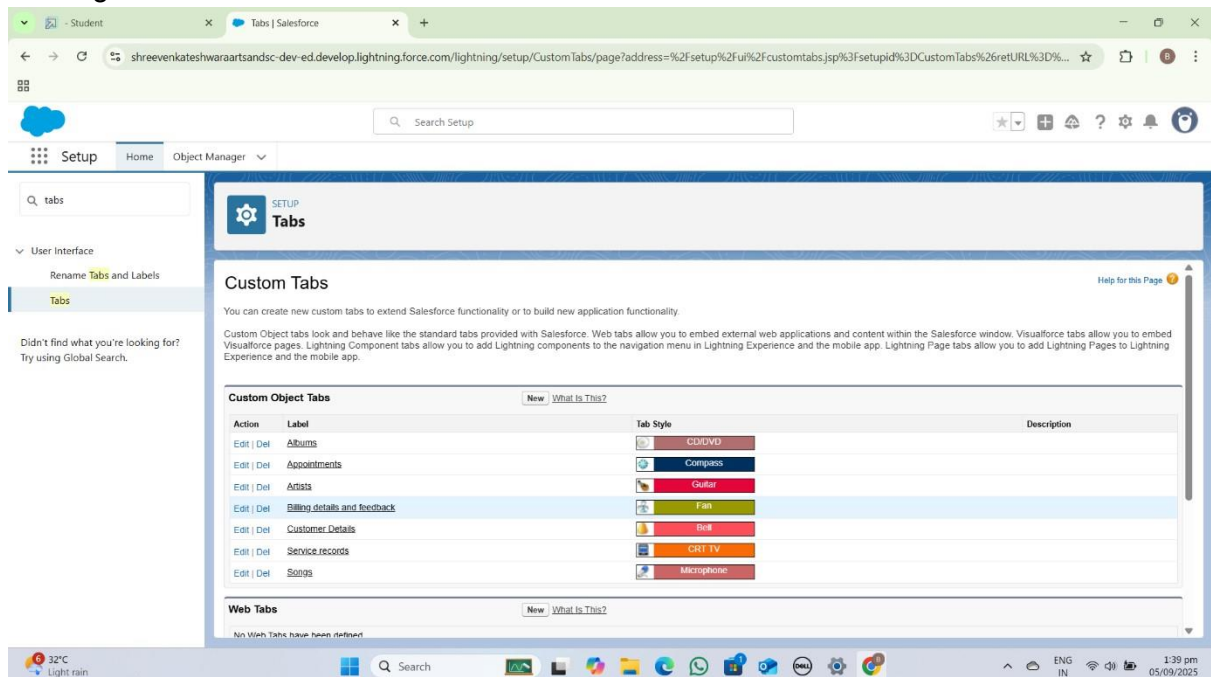
Create Billing Details and Feedback Object:



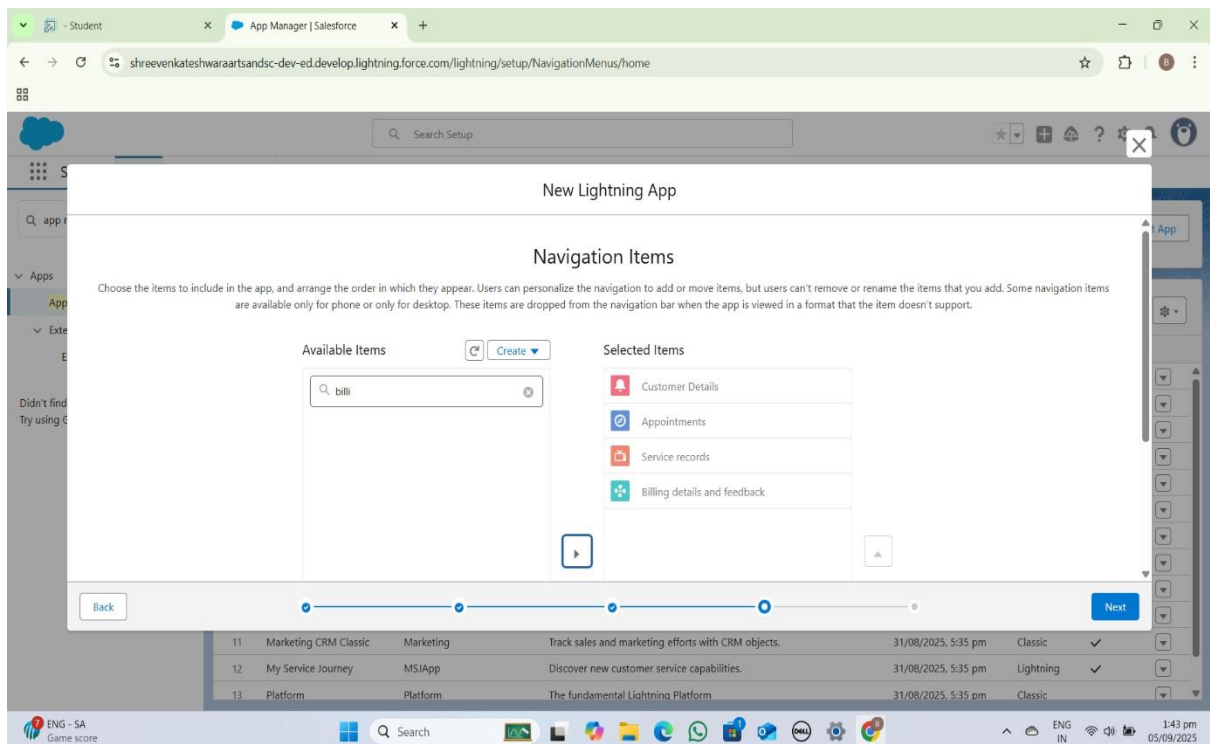
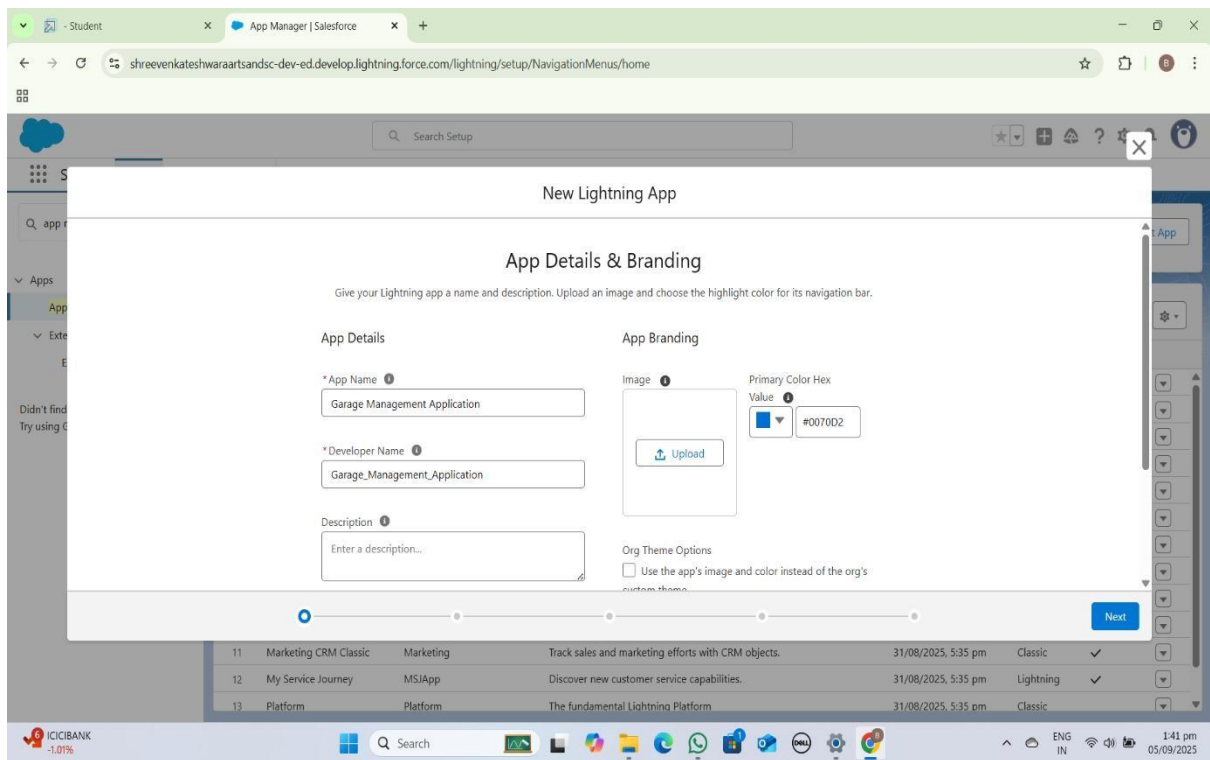
Tabs:

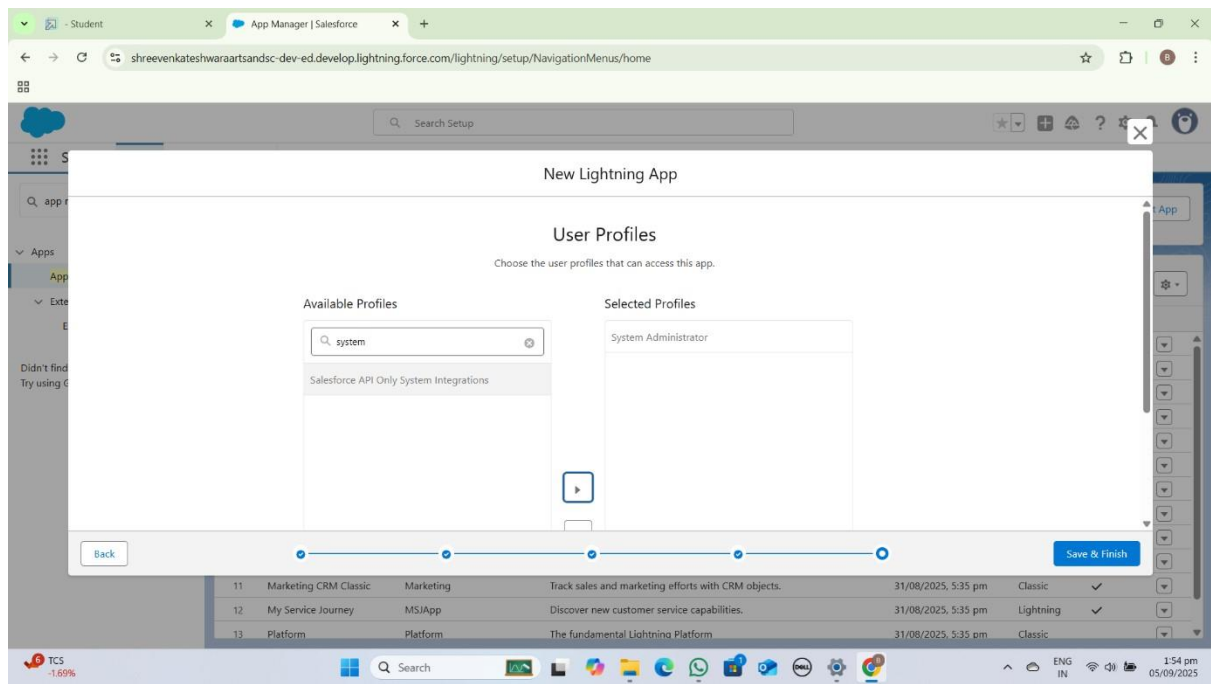
A Garage Management System (GMS) typically includes tabs for *Appointments*, *Customers*, *Vehicles*, and *Inventory*. These tabs organize system features and functions for easy access.

Creating A Custom Tabs:



Create A Lighting App:

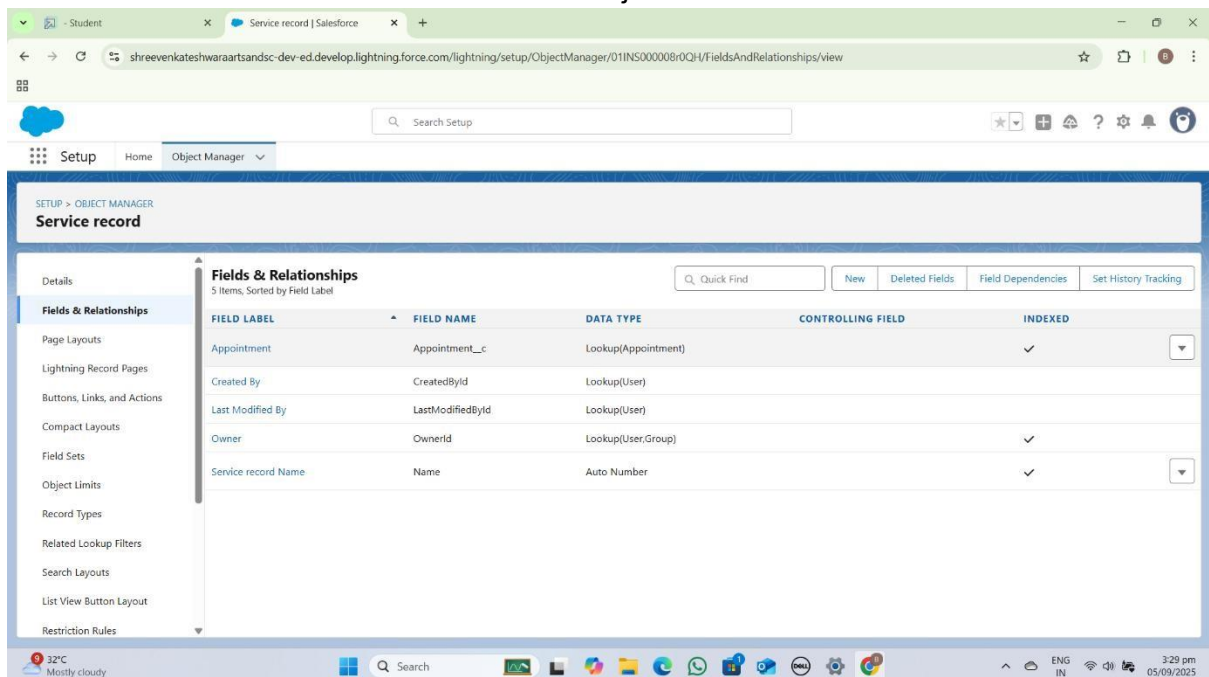




Fields:

1. ***Vehicle Information***: Vehicle ID, customer name, vehicle type, license plate, etc.
2. ***Service Details***: Service type, cost, description, etc.
3. ***Customer Information***: Customer name, contact details, service history, etc.
4. ***Payment and Billing***: Invoice numbers, payment status, amount, etc.

Creation Of Fields for The Customer Details Object:



Creation Of Lookup Fields:

Student Customer Detail | Salesforce

shreevenkateshwaraartsandsc-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS000008r08X/FieldsAndRelationships/view

Setup Home Object Manager

SETUP > OBJECT MANAGER

Customer Detail

Details

Fields & Relationships 6 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

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

Hot days ahead 32°C

Search

ENG IN 2:00 pm 05/09/2025

Creation Of Checkbox Fields:

Student Appointment | Salesforce

shreevenkateshwaraartsandsc-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS000008r0ID/FieldsAndRelationships/view

Setup Home Object Manager

SETUP > OBJECT MANAGER

Appointment

Details

Fields & Relationships 9 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Appointment Date	Appointment_Date__c	Date		
Appointment Name	Name	Auto Number		✓
Created By	CreatedById	Lookup(User)		
Customer Detail	Customer_Detail__c	Lookup(Customer Detail)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Maintenance service	Maintenance_service__c	Checkbox		
Owner	OwnerId	Lookup(User,Group)		✓
Repairs	Repairs__c	Checkbox		
Replacement Parts	Replacement_Parts__c	Checkbox		

29°C Mostly cloudy

Search

ENG IN 4:51 pm 05/09/2025

Creation Of Date Fields:

Screenshot of the Salesforce Setup page for the "Service record" object, showing the "Fields & Relationships" section. The page displays a list of fields and their relationships, including "Appointment", "Created By", "Last Modified By", "Owner", "Quality Check Status", "service_date", "Service record Name", and "Service Status".

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Appointment	Appointment__c	Lookup(Appointment)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Quality Check Status	Quality_Check_Status__c	Checkbox		
service_date	service_date__c	Formula (Date)		
Service record Name	Name	Auto Number		✓
Service Status	Service_Status__c	Picklist		

Creation Of Currency Fields:

Screenshot of the Salesforce Setup page for the "Billing details and feedback" object, showing the "Fields & Relationships" section. The page displays a list of fields and their relationships, including "Billing details and feedback Name", "Created By", "Last Modified By", "Owner", "Payment Paid", and "Service record".

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)		
Service record	Service_record__c	Lookup(Service record)		✓

Creation Of Text Fields:

Student | Billing details and feedback | Setup

shreevenkateshwaraartsandsc-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS000008r0YL/FieldsAndRelationships/view

Setup | Home | Object Manager

SETUP > OBJECT MANAGER

Billing details and feedback

Details

Fields & Relationships
7 Items, Sorted by Field Label

Quick Find | New | Deleted Fields | Field Dependencies | Set History Tracking

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)		
Rating for service	Rating_for_service__c	Text(1)		
Service record	Service_record__c	Lookup(Service record)		✓

29°C Mostly cloudy | Search | 4:58 pm 05/09/2025

Creation Of Picklist Fields:

Student | Billing details and feedback | Setup

shreevenkateshwaraartsandsc-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS000008r0YL/FieldsAndRelationships/view

Setup | Home | Object Manager

SETUP > OBJECT MANAGER

Billing details and feedback

Details

Fields & Relationships
8 Items, Sorted by Field Label

Quick Find | New | Deleted Fields | Field Dependencies | Set History Tracking

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)		
Service record	Service_record__c	Lookup(Service record)		✓

29°C Mostly cloudy | Search | 5:01 pm 05/09/2025

Creating Formula Field in Service Record Object:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Appointment	Appointment__c	Lookup(Appointment)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Quality Check Status	Quality_Check_Status__c	Checkbox		
service_date	service_date__c	Formula (Date)		
Service record Name	Name	Auto Number		✓
Service Status	Service_Status__c	Picklist		

Validation Rules:

A Garage Management System (GMS) includes validation rules to ensure data accuracy and integrity, such as *Vehicle ID format*, *Service Date*, and *Payment Amount* validation. These rules prevent errors and inconsistencies in the system.

Rules:

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Vehicle	Vehicle number plate	Please enter valid number	✓	project2, 25/09/2023, 11:56 am

Condition As Formula:

Error Condition Formula

Example: `Discount_Percent_c > 0.30` [More Examples...](#)
 Display an error if Discount is more than 30%
 If this formula expression is **true**, display the text defined in the Error Message area

Insert Field
Insert Operator ▼

```
NOT (REGEX( Vehicle number plate_c , "[A-Z]{2}[0-9]{2}[A-Z]{2}[0-9]{4}"))
```

Check Syntax

Functions

-- All Function Categories -- ▼

- ABS
- ACOS
- ADDMONTHS
- AND
- ASCII
- ASIN

Insert Selected Function

ABS(number)
Returns the absolute value of a number, a number without its sign

[Help on this function](#)

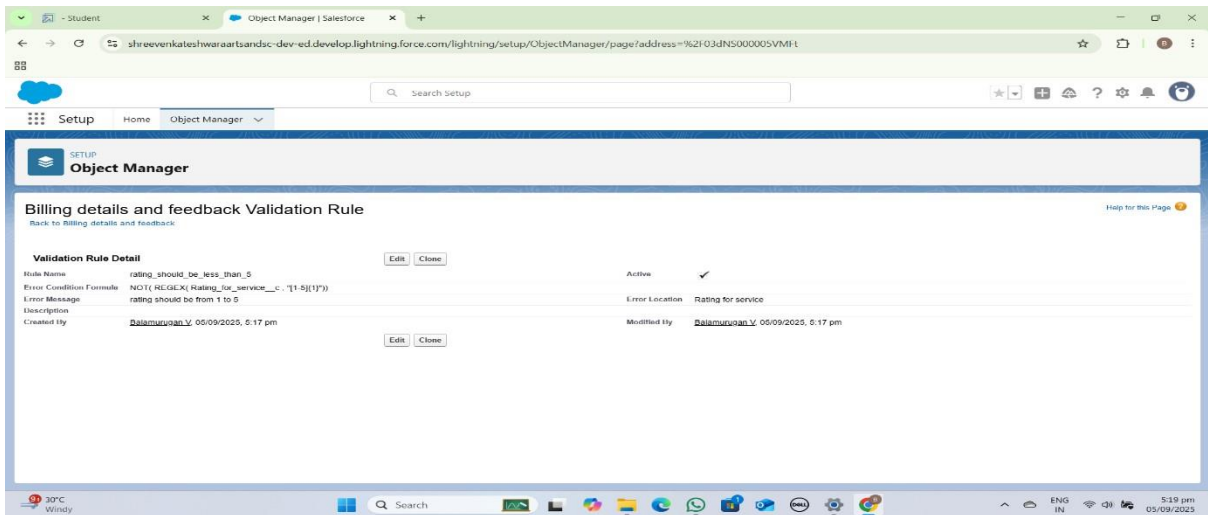
To Create A Validation Rules to an Appointment Object:

The screenshot shows the Salesforce Setup interface for the Appointment object. The left sidebar contains navigation links: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, and Restriction Rules. The main content area is titled 'Appointment' and shows 'Validation Rules' with 1 item, sorted by Rule Name. A table lists the validation rule:

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Vehicle	Vehicle number plate	Please enter valid number	✓	Balamurugan V, 05/09/2025, 5:15 pm

A 'New' button is located in the top right corner of the Validation Rules section.

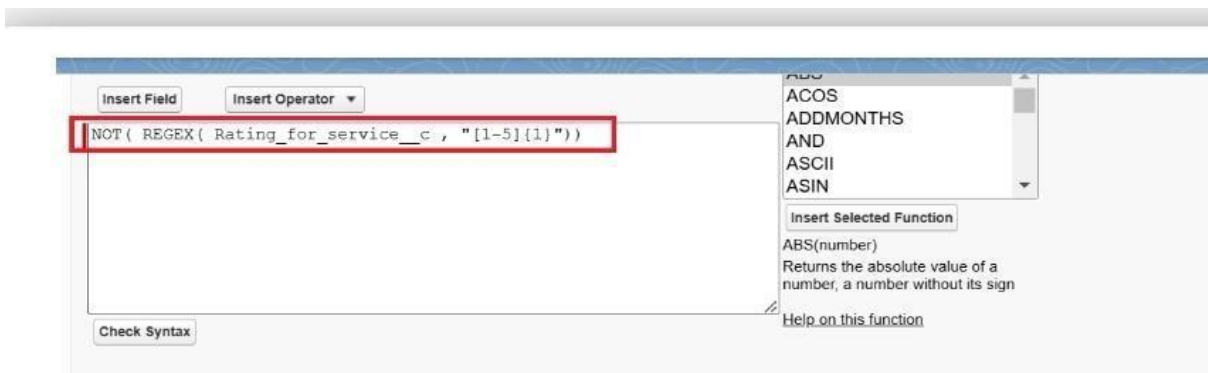
To Create a Validation Rule to a Billing Details and Feedback Object:



Rule Edit:

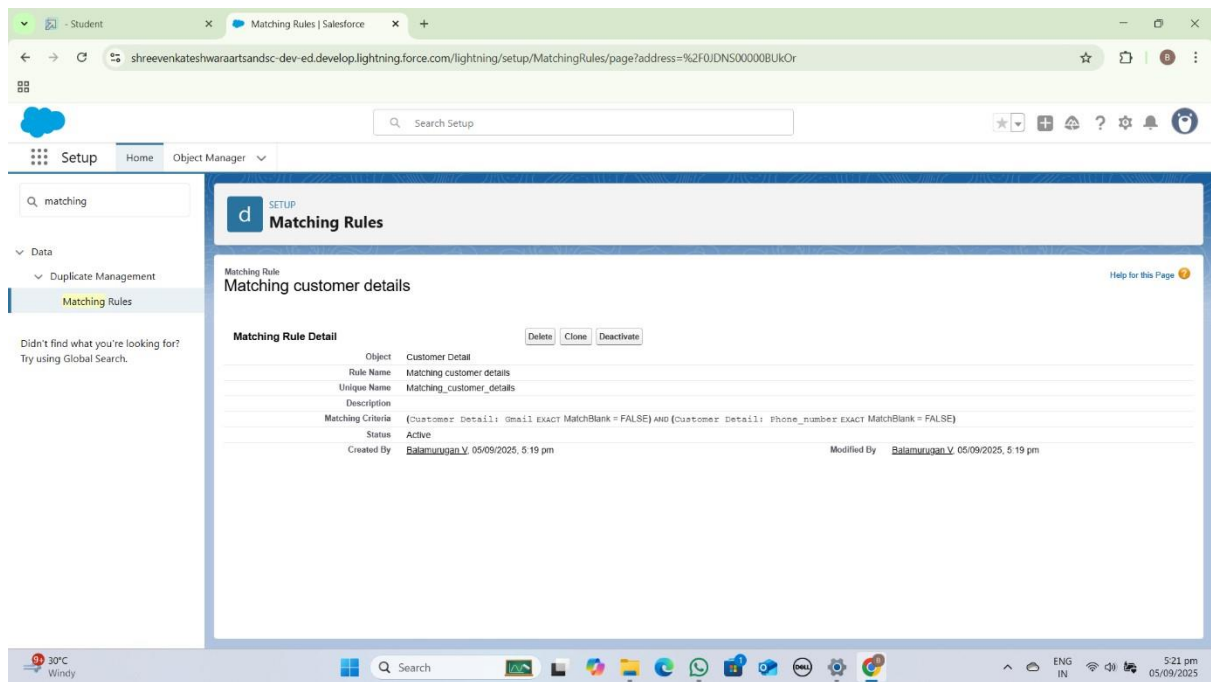


Condition Formula:

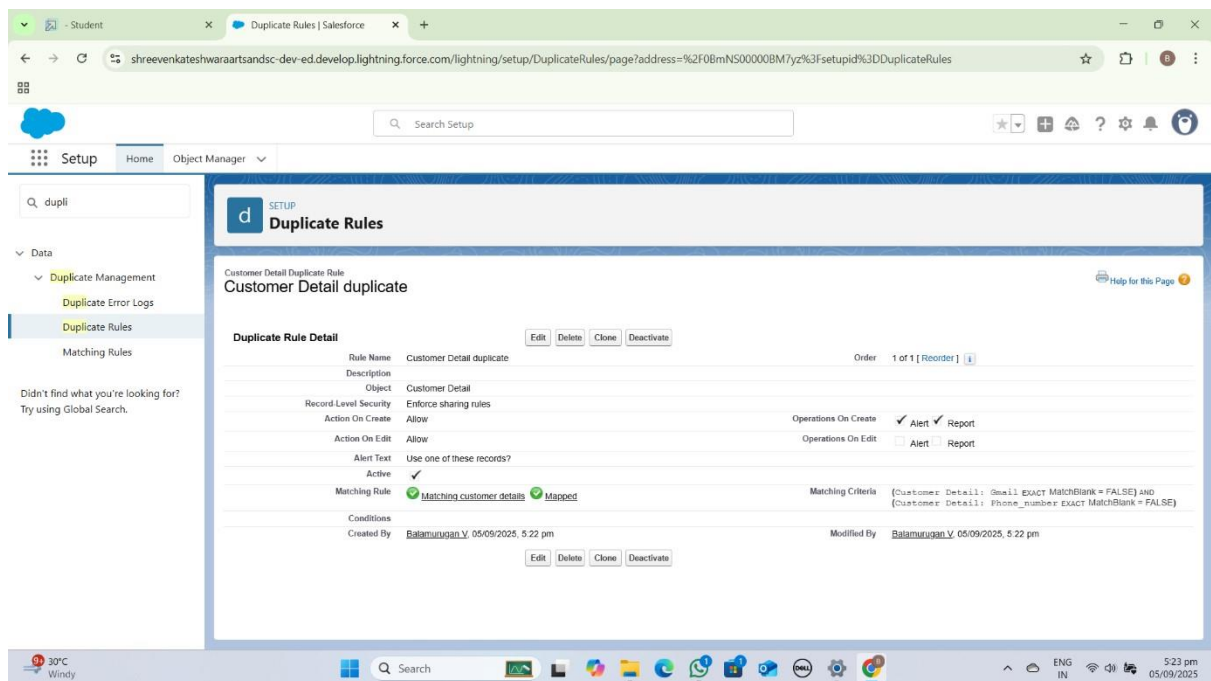


Duplicate Rule:

A duplicate rule in a Garage Management System (GMS) prevents *duplicate customer records* and *duplicate vehicle records*, ensuring data accuracy and integrity. To Create a Matching Rule To an Customer Details Object



To Create a Duplicate Rule to a Customer Details Object:



Profiles:

A Garage Management System (GMS) profile includes garage information, services offered, and technician details. It provides a comprehensive overview of the garage's operations and capabilities.

Manager Profile:

The screenshot shows the Salesforce Setup interface for the 'Profiles' section. The left sidebar contains a navigation menu with 'Setup', 'Home', and 'Object Manager'. The main content area displays the 'Manager' profile configuration. The 'Profile Detail' section shows the profile name 'Manager', user license 'Salesforce', and a description. The 'Page Layouts' section lists various layouts assigned to the profile, including 'Global Layout', 'Email Application', 'Home Page Layout', and 'Account Layout'. The 'Standard Object Layouts' section lists layouts for various objects like 'Global', 'Email Application', 'Home Page Layout', and 'Account Layout'.

Sales Person Profile:

The screenshot shows the Salesforce Setup interface for the 'Profiles' section. The left sidebar contains a navigation menu with 'Setup', 'Home', and 'Object Manager'. The main content area displays the 'sales person' profile configuration. The 'Profile Detail' section shows the profile name 'sales person', user license 'Salesforce Platform', and a description. The 'Page Layouts' section lists various layouts assigned to the profile, including 'Global Layout', 'Email Application', 'Home Page Layout', and 'Account Layout'. The 'Standard Object Layouts' section lists layouts for various objects like 'Global', 'Email Application', 'Home Page Layout', and 'Account Layout'.

Role & Role Hierarchy:

In a Garage Management System (GMS), roles and role hierarchy may include:

1. ***Admin*:** Full access to system settings, reports, and management.
2. ***Manager*:** Oversees operations, manages staff, and reviews performance.
3. ***Technician*:** Performs vehicle services and repairs.
4. ***Receptionist*:** Handles customer inquiries, scheduling, and billing.
5. ***Customer*:** Views service history, schedules appointments.

Role hierarchy:

1. *Admin* > *Manager* > *Receptionist* > *Technician* > *Customer*

Creating Manager Role:

The screenshot shows the Salesforce Setup page for the 'Manager' role. The left sidebar contains navigation links for Users, Roles, Feature Settings, Sales, Service, and Case Teams. The main content area displays the 'Role: Manager' details, including its hierarchy, modified by, and sharing groups. Below the details is a section for 'Users in Manager Role' with buttons for 'Assign Users to Role' and 'New User'.

Role: Manager

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

Hierarchy: Shree Venkateshwara arts and science college > CEO > Manager
Siblings: SVP, Sales & Marketing, SVP, Customer Service & Support, CEO, SVP, Human Resources, COO

Users in Manager Role (0)

Role Detail

Label	Manager	Role Name	Manager
This role reports to	CEO	Role Name as displayed on reports	
Modified By	Balamurugan V. 05/09/2025, 5:42 pm	Sharing Groups	Role, Role and Internal Subordinates
Opportunity Access	Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities		
Case Access	Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases		

Users in Manager Role

Assign Users to Role New User

Users in Manager Role Help

Creating Another Role:

This screenshot is identical to the one above, showing the Salesforce Setup page for the 'Manager' role. It displays the role hierarchy, details, and the 'Users in Manager Role' section.

Role: Manager

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

Hierarchy: Shree Venkateshwara arts and science college > CEO > Manager
Siblings: SVP, Sales & Marketing, SVP, Customer Service & Support, CEO, SVP, Human Resources, COO

Users in Manager Role (0)

Role Detail

Label	Manager	Role Name	Manager
This role reports to	CEO	Role Name as displayed on reports	
Modified By	Balamurugan V. 05/09/2025, 5:42 pm	Sharing Groups	Role, Role and Internal Subordinates
Opportunity Access	Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities		
Case Access	Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases		

Users in Manager Role

Assign Users to Role New User

Users in Manager Role Help

Users:

Create User:

The screenshot shows the Salesforce Setup page for a user named Mikaelson Niklaus. The left sidebar contains navigation options like Users, Permission Set Groups, and Profiles. The main content area displays the user's details, including Name, Email, Username, and Role (sales person). The user is active and has a Salesforce Platform license. The page also shows various settings and links for managing the user.

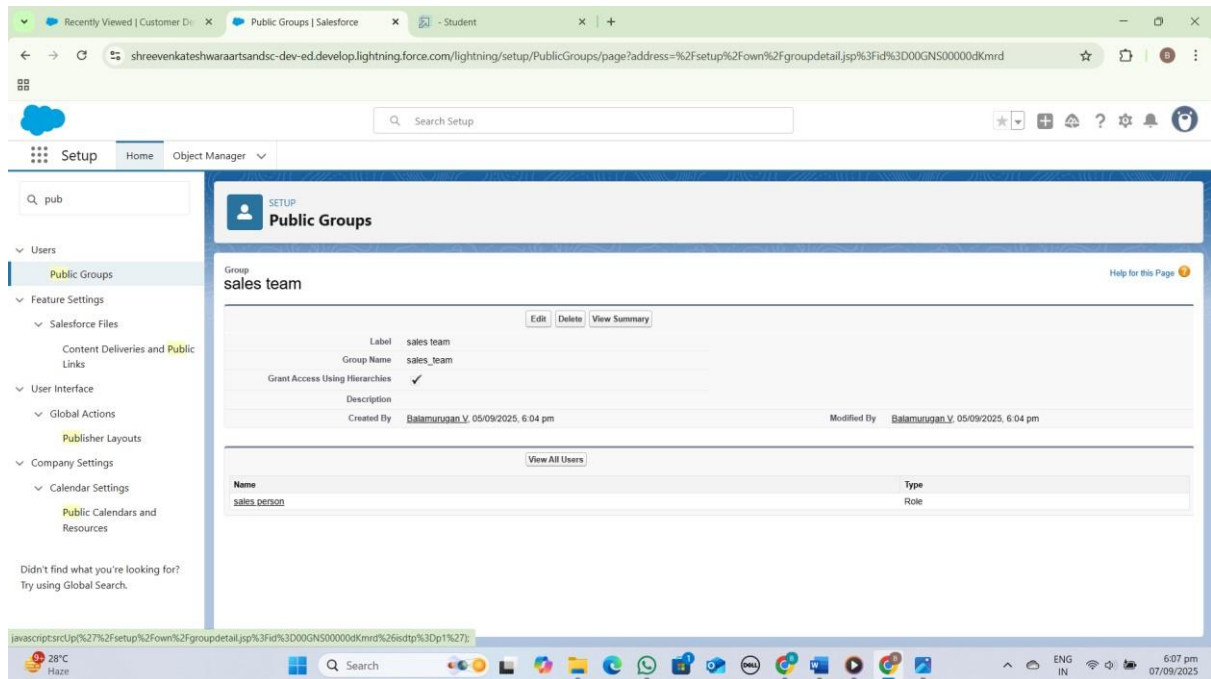
Creating Another User:

The screenshot shows the Salesforce Setup page for a user named Bala murugan. The left sidebar contains navigation options like Users, Permission Set Groups, and Profiles. The main content area displays the user's details, including Name, Email, Username, and Role (sales person). The user is active and has a Salesforce Platform license. The page also shows various settings and links for managing the user.

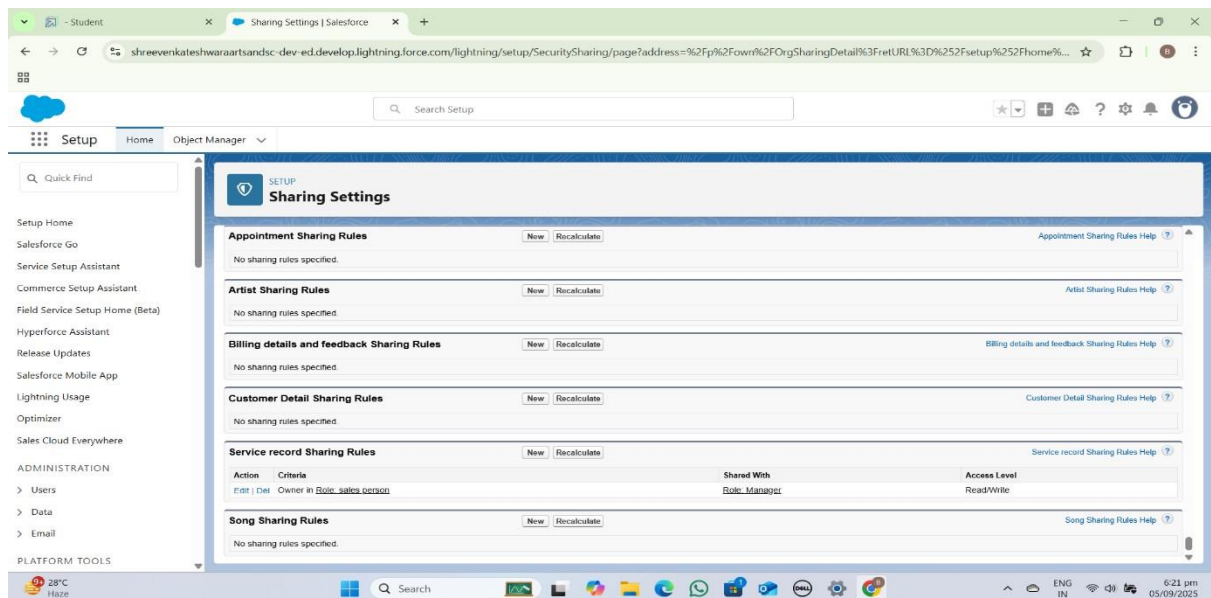
Public Groups:

In a Garage Management System (GMS), public groups may include *Administrators*, *Managers*, *Technicians*, and *Receptionists*. These groups define access levels and permissions for system users.

Creating New Public Groups:



Sharing Setting: Creating Sharing Settings:



Flows:

In a Garage Management System (GMS), the flow typically involves *Customer Booking* and *Service Fulfillment*, where customers schedule appointments, vehicles are serviced, and payments are processed. This flow streamlines garage operations and enhances customer experience.

Create A Flow:

The screenshot displays the Salesforce Flow Builder interface for a flow named "Update Service Status - V1". The flow is a Record-Triggered Flow that starts with a "Start" node, followed by a "Run Immediately" node, and then an "Update Records 1" node. The "Update Records 1" node is highlighted, and its configuration panel is open on the right. The configuration panel shows the following details:

- Label:** Update Records 1
- *API Name:** Update_Records_1
- Description:** (Empty text area)
- *How to Find Records to Update and Set Their Values:**
 - ☒ Use the service record record that triggered the flow.
 - ☐ Update records related to the service record record that triggered the flow
 - ☐ Use the IDs and all field values from a record or record collection
 - ☐ Specify conditions to identify records, and set fields individually
- Set Filter Conditions:**
 - Condition Requirements to Update Record: All Conditions Are Met (AND)
 - Field: Quality Check Status
 - Operator: Equals
 - Value: True

The bottom of the interface shows the Windows taskbar with the date and time as 9:31 pm on 05/09/2025.

Apex Trigger:

In Salesforce, an Apex trigger for a Garage Management System (GMS) could be used to:

1. ***Automate tasks*:** Trigger actions when records are inserted, updated, or deleted.
2. ***Validate data*:** Ensure data consistency and accuracy.
3. ***Send notifications*:** Notify stakeholders of changes or updates.

Apex Handler:

Developer Console - Google Chrome

shreevenkateshwaraitsandsc-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage

AmountDistributionHandler.apxc AmountDistribution.apxt

Code Coverage: None API Version: 64

```
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
11 for(Appointment__c app : listApp){
12
13     if(app.Maintenance_service__c == true && app.Repairs__c == true && app.Replacement_Parts__c == true){
14
15         app.Service_Amount__c = 10000;
16
17     }
18
19     else if(app.Maintenance_service__c == true && app.Repairs__c == true){
```

Logs Tests Checkpoints Query Editor View State Progress Problems

User	Application	Operation	Time	Status	Read	Size
------	-------------	-----------	------	--------	------	------

Filter Click here to filter the log list

28°C Haze Search 6:23 pm 07/09/2025

Developer Console - Google Chrome

shreevenkateshwaraitsandsc-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage

AmountDistributionHandler.apxc AmountDistribution.apxt

Code Coverage: None API Version: 64

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

Logs Tests Checkpoints Query Editor View State Progress Problems

User	Application	Operation	Time	Status	Read	Size
------	-------------	-----------	------	--------	------	------

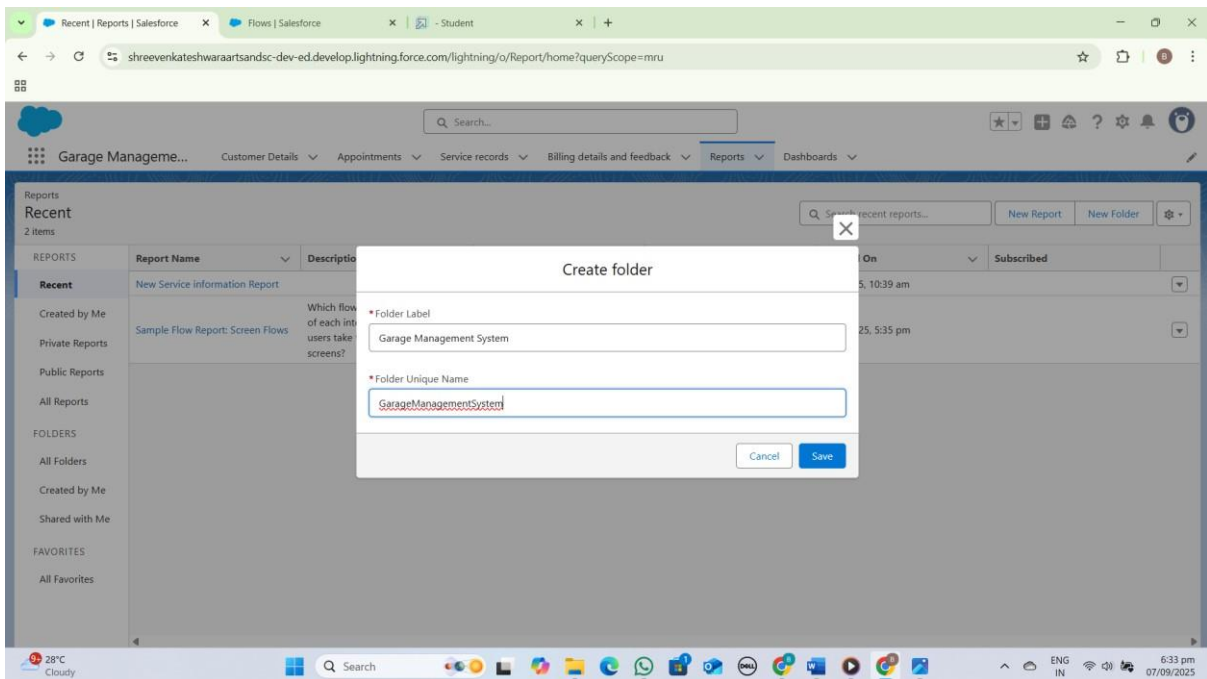
Filter Click here to filter the log list

28°C Haze Search 6:24 pm 07/09/2025

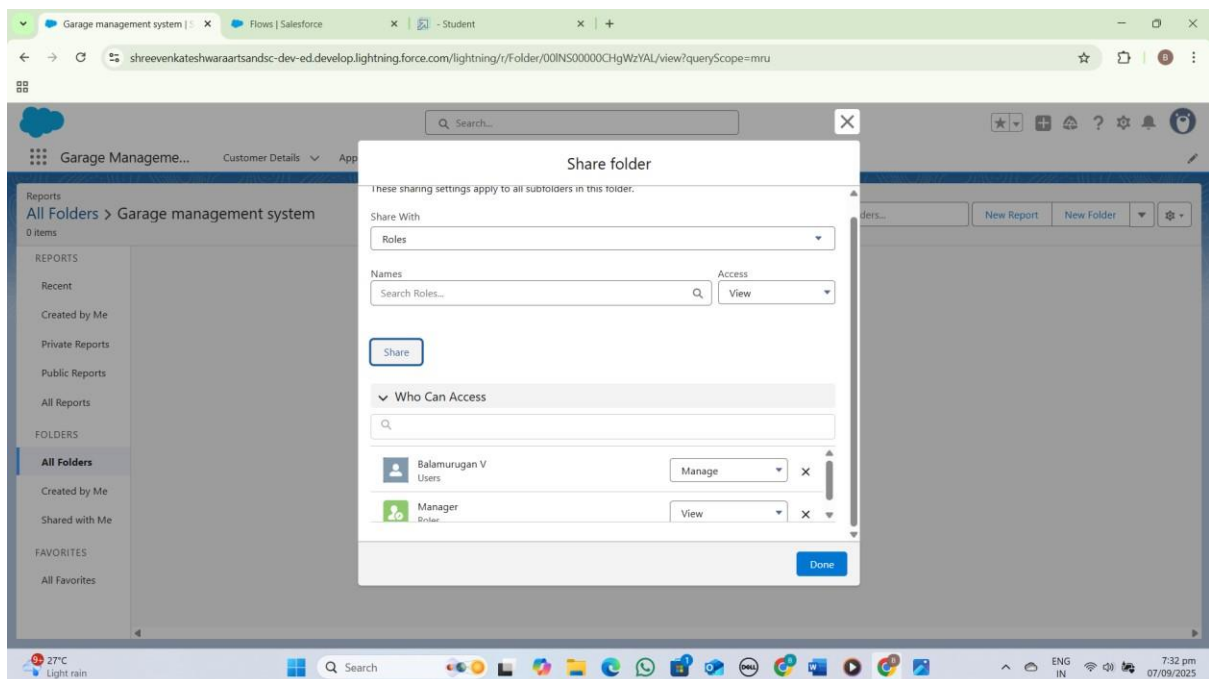
Reports:

A Garage Management System (GMS) generates reports on *Service History*, *Revenue*, *Inventory*, and *Technician Performance*. These reports provide valuable insights to optimize garage operations and inform business decisions.

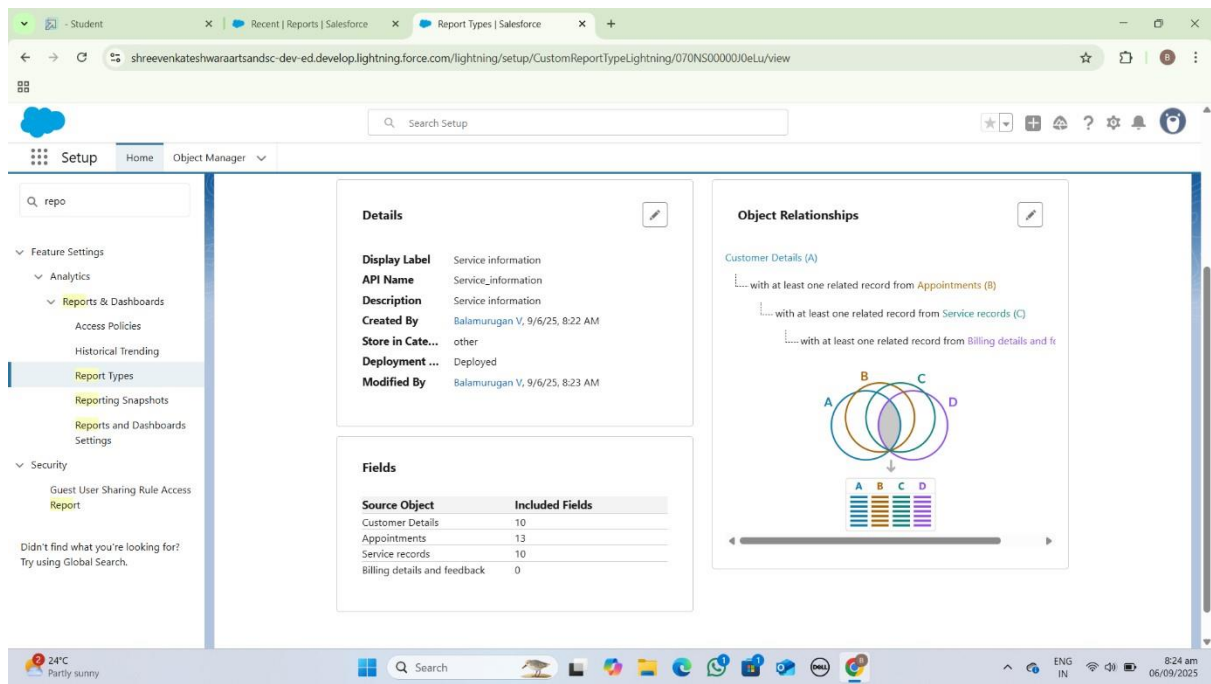
Create A Report Folder:



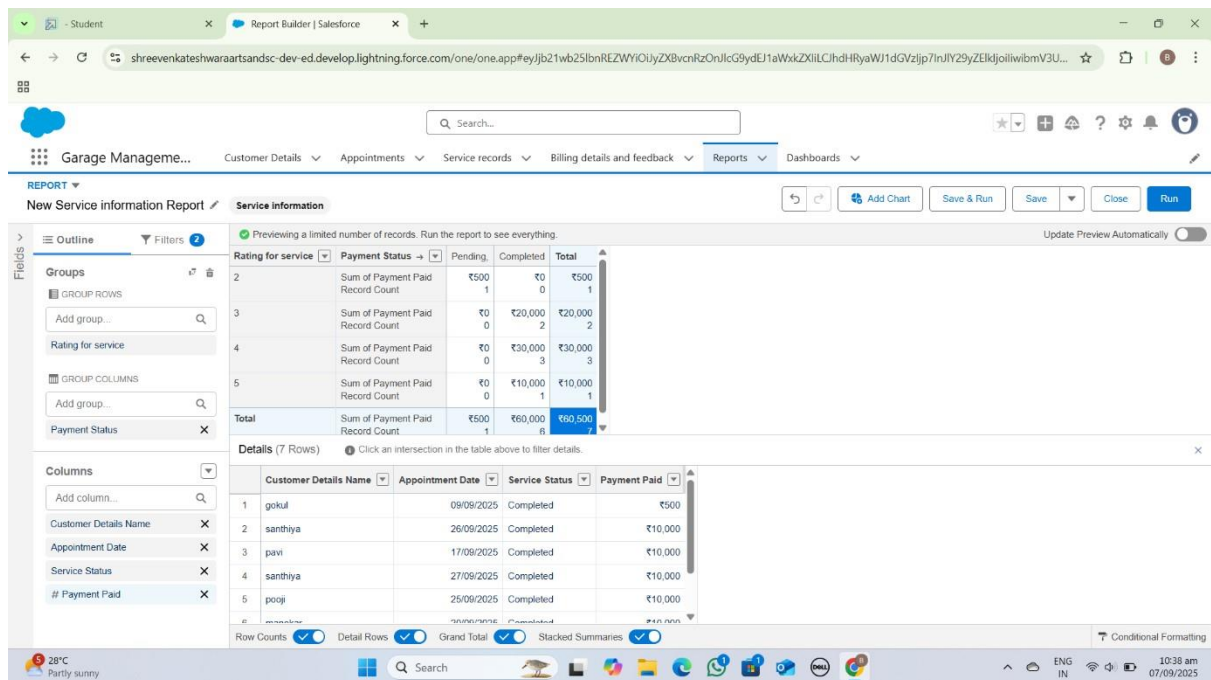
Sharing A Report Folder:



Create Report Type:



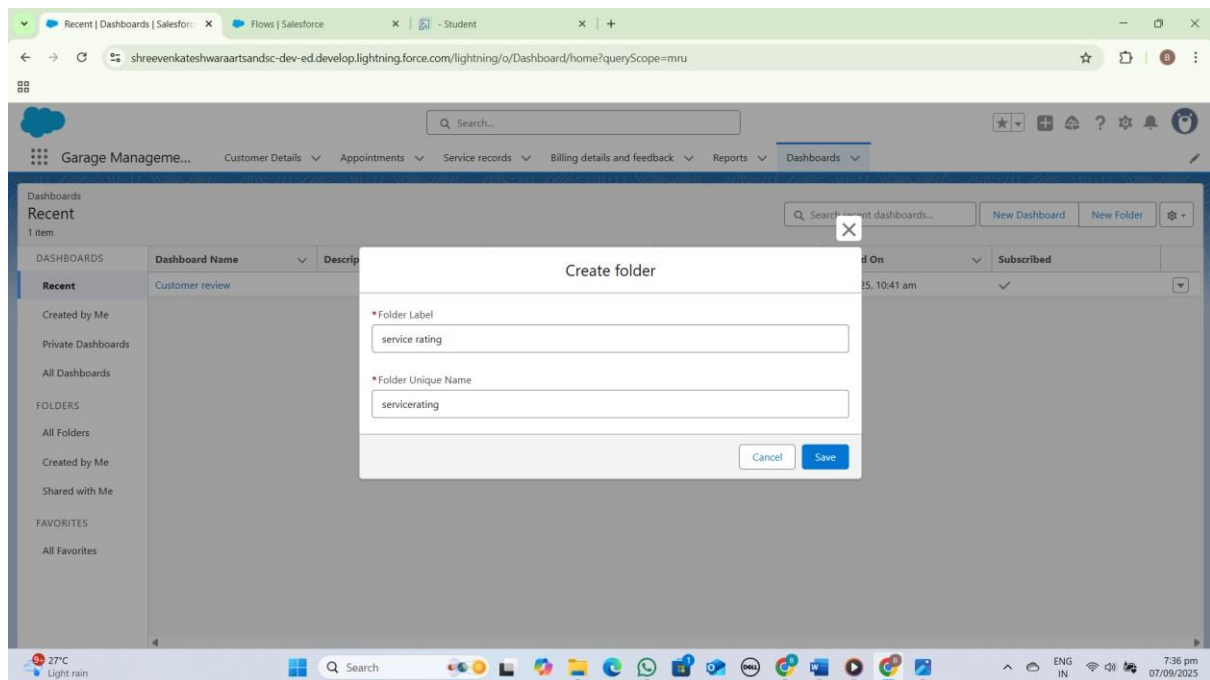
Create Report:



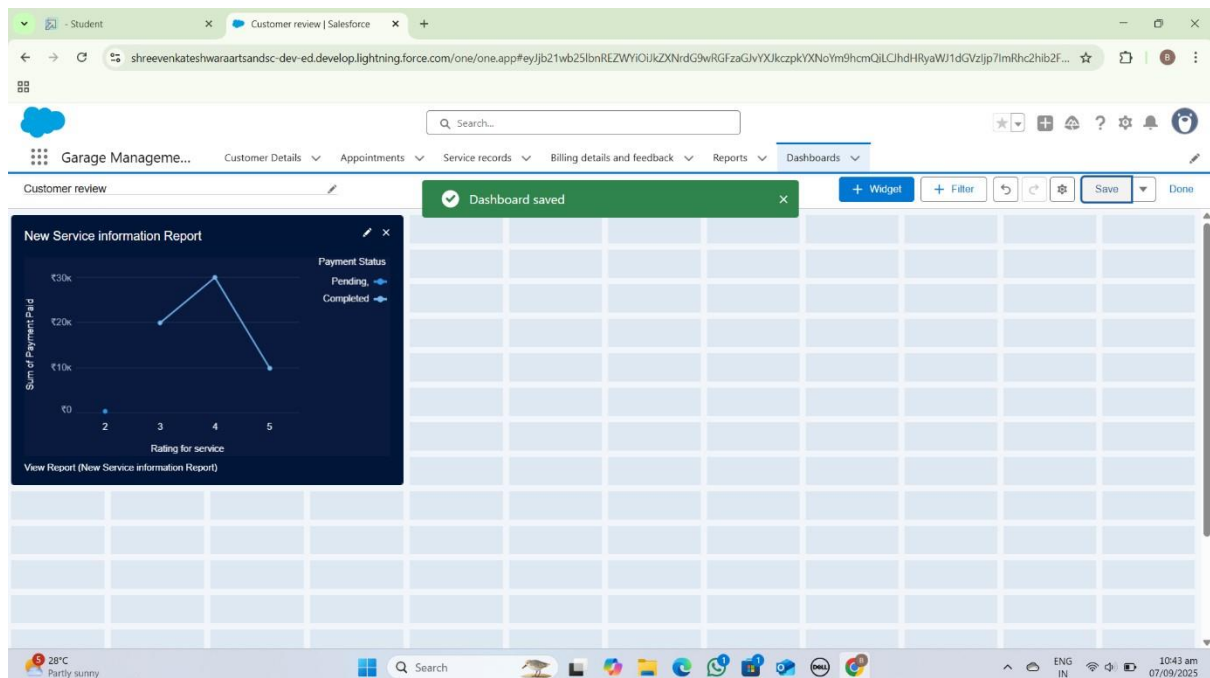
Dashboards:

A Garage Management System (GMS) dashboard displays key metrics like *Appointment Schedule*, *Revenue*, and *Inventory Levels*. It provides a centralized view of garage operations and performance.

Create Dashboard Folder:



Create Dashboard:



User Adoption:

User adoption of a Garage Management System (GMS) requires *effective training* and *ongoing support* to ensure staff can utilize the system efficiently. This leads to improved productivity and customer satisfaction.

Creating Records:

mac | Customer Detail | Salesforce | Flows | Salesforce | Student

shreevenkateshwaraartsandsc-dev-ed.develop.lightning.force.com/lightning/r/Customer_Detail__c/a05NS00000gZeqTVAS/view

Search...

Garage Manage... Customer Details Appointments Service records Billing details and feedback Reports Dashboards

Customer Detail
mac

New Contact Edit New Opportunity

Related Details

Customer Details Name	mac	Owner	Balamurugan V
Phone number	5678765567		
Gmail	mac@gmail.com		
Created By	Balamurugan V, 07/09/2025, 10:44 am	Last Modified By	Balamurugan V, 07/09/2025, 10:44 am

Activity

Filters: All time • All activities • All types

Refresh Expand All View All

Upcoming & Overdue

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.

27°C Light rain

7:39 pm 07/09/2025

app-029 | Appointment | Salesforce | Flows | Salesforce | Student

shreevenkateshwaraartsandsc-dev-ed.develop.lightning.force.com/lightning/r/Appointment__c/a06NS00000blrGTAYV/view

Search...

Garage Manage... Customer Details Appointments Service records Billing details and feedback Reports Dashboards

Appointment
app-029

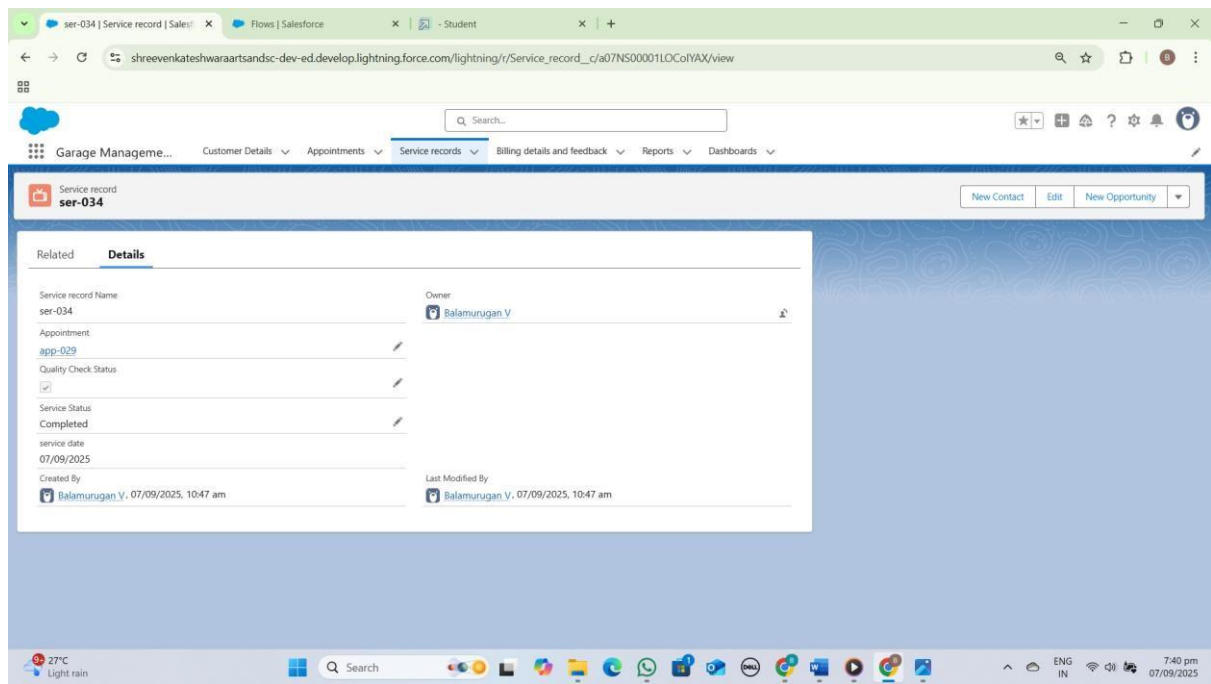
New Contact Edit New Opportunity

Related Details

Appointment Name	app-029	Owner	Balamurugan V
Customer Detail	mac		
Appointment Date	11/09/2025		
Maintenance service	<input checked="" type="checkbox"/>		
Repairs	<input checked="" type="checkbox"/>		
Replacement Parts	<input type="checkbox"/>		
Service Amount	₹5,000		
Vehicle number plate	TS03EU0443		
Created By	Balamurugan V, 07/09/2025, 10:46 am	Last Modified By	Balamurugan V, 07/09/2025, 10:46 am

27°C Light rain

7:39 pm 07/09/2025



CONCLUSION:

The Garage Management System (GMS) plays a vital role in modernizing and streamlining the operations of automobile service centers. By automating tasks such as customer management, vehicle tracking, service scheduling, billing, and inventory control, the system reduces manual effort, minimizes errors, and saves valuable time.