Garageman

Version 1.0

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Garageman

Requirements

Intel Pentium processor (Pentium II or higher recommended)

Windows 9x, NT, 2000, XP

32mb of RAM

1024x768 display recommended

50MB of free hard disk space

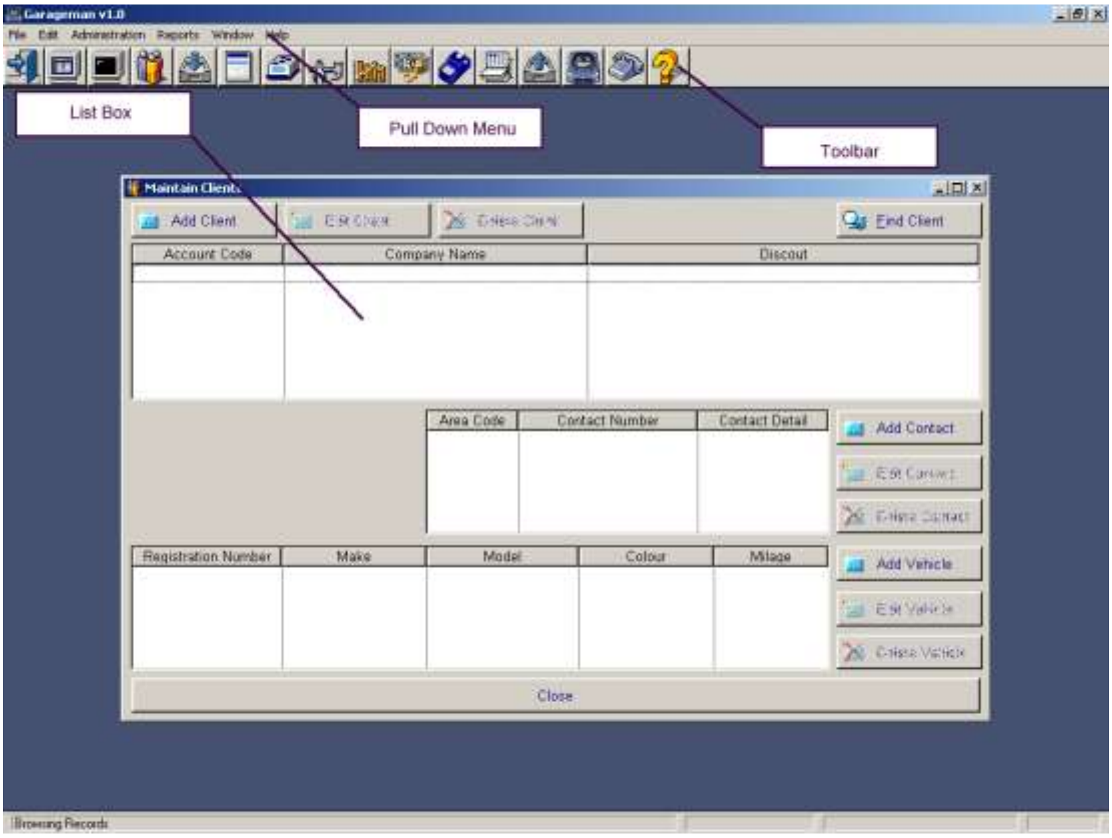
CD ROM Drive

Installation

To install Garageman, run the “Setup.exe” file that is located on the Garageman CD or if you have downloaded the Demo, run the file from the location it is stored. This will run you through Garageman’s set-up options.

Once Garageman is installed, it can be located in ***/program filess/Garageman*** in your Start Menu.

Terms Used



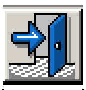
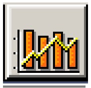
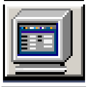
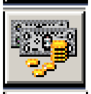
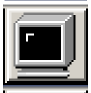
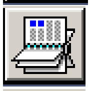
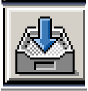
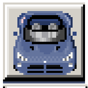
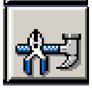
List Boxes are boxes within the screens that list items that you will need access to. Once the list box is full scroll bars will appear on the right hand side of the list box.

Toolbar, is a graphical interface that gives you the options available in Garageman.

Pull Down Menus, are another way to access the programmes options that are on the toolbar.

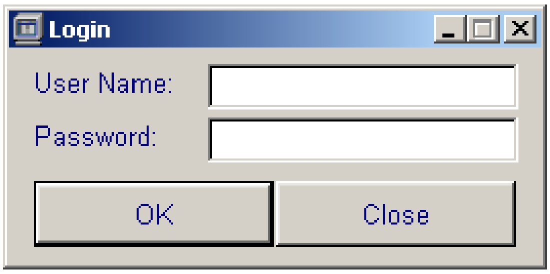
The Garageman tool bar

Below is an explanation of the buttons functions on the tool bar. When hovering your mouse cursor over the buttons, a simple explanation will be given for each button.

	**Exit Garageman**		**Maintain Stock**
	**Login**		**Maintain Job Charges**
	**Log Out**		**Maintain VAT**
	**Maintain Clients**		**Maintain Interval Checks**
	**Maintain Jobs**		**Quick View Jobs**
	**Browse Invoices**		**Quick View Vehicles**
	**Maintain Suppliers**		**Quick View Contacts**
	**Maintain Mechanics**		**Help**
	**CD Burning of Vehicle History**		

Login

When starting **Garageman** you must first login. This can be achieved by pressing the "Login" button on the toolbar. Upon pressing the login button you will be presented with the screen below.



If you have purchased the full version of **Garageman** on CD or requested the demo on CD, use the username (**ADMIN**) and password (**PASSWORD**).

If you have downloaded the trial version, please contact us to register your details and you will be given a username and password.

If you upgrading from the trial version to the full version, use the user profiles that you have already set up.

ADMINISTRATORS SECURITY NOTE; It is strongly recommended that the default administrators password (password) is changed at the earliest convenience otherwise anyone reading this manual will be able to log on as an administrator and gain full access to the system.

Garageman Security

Garageman has 3 main levels of security, Base (Level 1), Normal (Level 2) and Admin (level 3). *Depending on your level of security you will be able to access different options in Garageman. Here is a quick breakdown:-*

Base User

Add Clients
Add Client Contact Details
Add Client Vehicles
Job Card Creation
Print Job Cards
Burn Vehicle History CD’s

Normal User

Maintain Clients
Maintain Customer Billing Addresses
Maintain Client Contact Details
Maintain Client Vehicles
Add/Maintain Jobs
Job Card Creation
Job Work
Mechanic Assists
Print Job Cards
Maintain Job Parts
Complete Jobs
Print Invoices
Burn Vehicle History CD’s

Maintain Suppliers
Maintain Mechanics
Maintain Mechanics Job Positions
Maintain Stock
Supplier Part Codes
Stock History
Maintain VAT Codes
Maintain Job Charges
Maintain Check Intervals
Quick View Jobs
Quick View Invoices
Quick View Vehicles
Quick View Contact Details

Admin User

Maintain Clients
Maintain Customer Billing Addresses
Maintain Client Contact Details
Maintain Client Vehicles
Add/Maintain Jobs
Job Card Creation
Job Work
Mechanic Assists
Print Job Cards
Maintain Job Parts
Complete Jobs
Maintain Completed Jobs (Before Invoices Have Been Printed Only)
Maintain Invoice Message
Print Invoices
Maintain Suppliers
Maintain Mechanics
Maintain Mechanics Job Positions
Maintain Stock
Supplier part Codes
Stock History
Maintain VAT Codes
Maintain Job Charges
Maintain Check Intervals
Maintain Parts Mark-up Value
Maintain Users
Quick View Jobs
Quick View Invoices
Quick View Vehicles
Quick View Contact Details
Produce Reports
Burn Vehicle History CD's

The Reports currently available on Garageman are as follows:-

Client List Report
Vehicle List Report
Vehicle History Report
Vehicle Testing Report
Job List Report
Invoice List Report
Supplier List Report
Mechanic List Report
Mechanic Efficiency Report

Stock List Report
Stock Valuation Report
Parts On Order Report
Returns Query Report

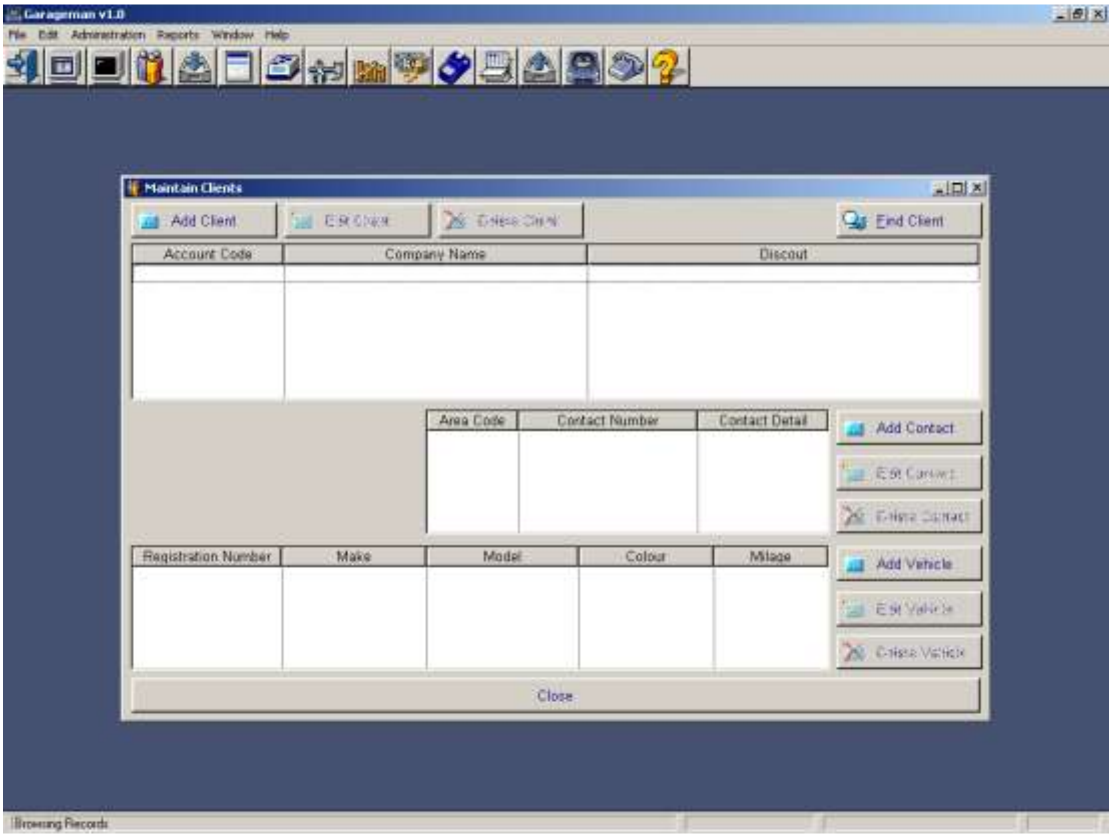
Whats Next ?

The next step is to set-up all the data for Garageman, entering your clients, their vehicles, your charges, suppliers, mechanics etc… .

Creating and Maintaining Clients

Maintain Clients

If you are set at base (Level 1) security you may only add a client. To add a client, click on the “Add Client” button or right click on the list box and select “Add Client” as shown in the screen shot below.



Clients may also be edited and deleted by using the “Edit Client” button or the “Delete Client” button, or from the menu when you right click on the list box.

Once in the Client details screen you must enter a company name from which the account code for this client will be generated. All fields marked in blue are required fields and must be entered for the client. The freeze account tick box, will allow you to display a warning message, if you try and enter a job for this client. Setting up a billing address is also required. See “Maintain Customer Billing Addresses” below to find out how to set one up. Once you are done, click on the “OK” button to exit the client details screen.

Maintaining Customer Billing Addresses

For each customer you must set up a billing address, this can be done from the client details screen, or when a new job is added. Simply click on the “Add Billing Address” button or right click on the list box and select “Add Billing Address”. Billing addresses may also be edited and deleted by using the “Edit Billing Address” button or the “Delete Billing Address” button, or from the menu when you right click on the list box.

In the Billing Address details, either fill out the address to be added, or if you simply want to use the address you used to set up the customer, click on the “Owner Address” button and the details will be copied into the fields. Now click on the “OK” button to complete.

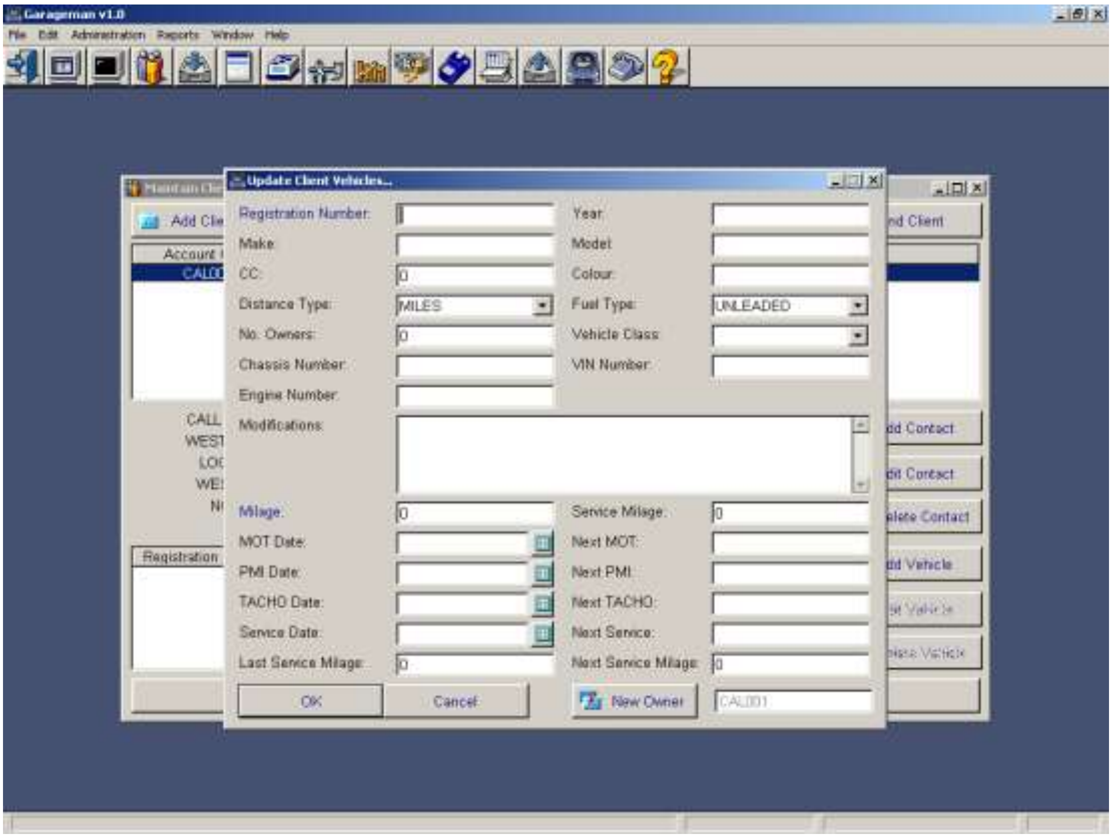
Maintain Client Contact Details

For each client you may add as many contact details, as required. To add a contact detail, click on the “Add Contact” button or right click on the list box and select “Add Contact”.

Contact details may also be edited and deleted by using the “Edit Contact” button or the “Delete Contact” button, or from the menu when you right click on the list box.

Entering the details are simple, enter your area code if applicable, then the number and then the description for this number, for example “Office” or “Home Number”.

Maintain Client Vehicles



To add a client, click on the "Add Client Vehicle" button or right click on the list box and select "Add Client Vehicle".

Clients may also be edited and deleted by using the "Edit Client Vehicle" button or the "Delete Client Vehicle" button, or from the menu when you right click on the list box.

The Registration Number and mileage for this vehicle must be entered, also enter the vehicle type, as this will determine whether you will reported on for PMI and TACHO checks. The service mileage is the amount of miles that you may do between each service, and the Last service mileage allows you to enter the amount of miles the vehicle had done when it was last serviced. Entering the dates of all your last checks will allow the system to calculate the date for the vehicles next testing based on the intervals set up (See "Maintain Interval Checks").

If you wish to reassign this vehicle to another client, you may do so by clicking on the "New Owner" button and entering the new owners account code (you must have the new client on the system already).

When the vehicle details are complete, click on the "OK" button.

Job Processing

Add/Maintain Jobs

To maintain jobs you may click on the "Maintain Jobs" button as shown below. Administrator users may also select "Maintain Jobs" from the Administrator pull down menu

Job Card Creation

The first step of creating a job is by simply creating the job card. To add a job select the vehicle to work on and click on the "Add Job" button, or right click on the list box and select "Add Job"

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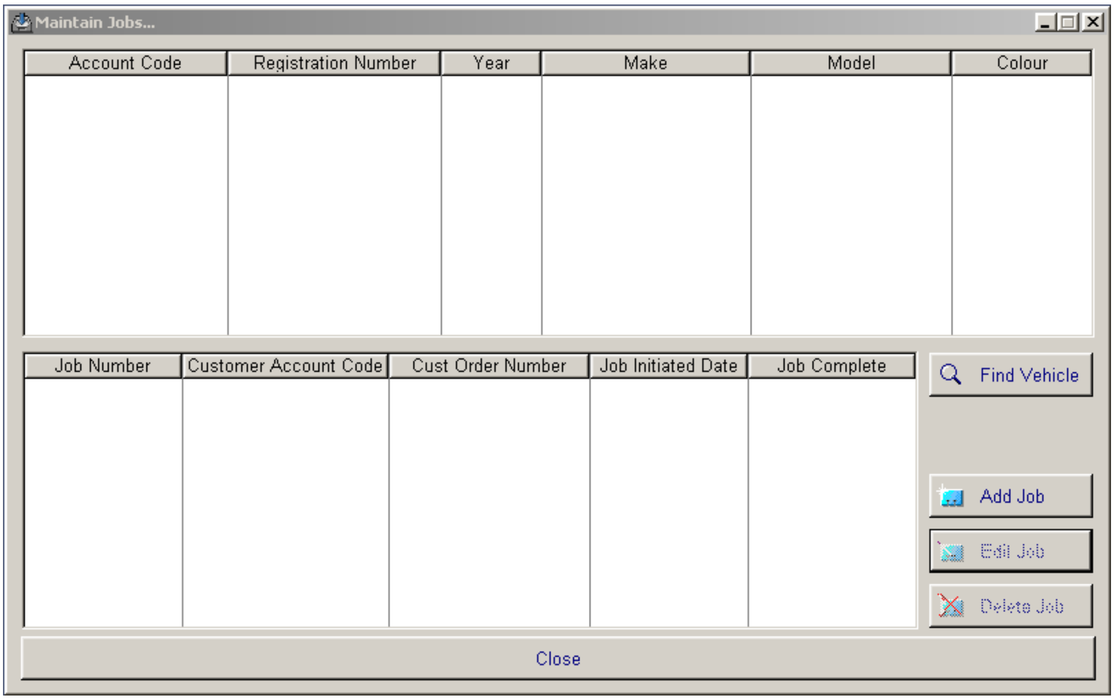
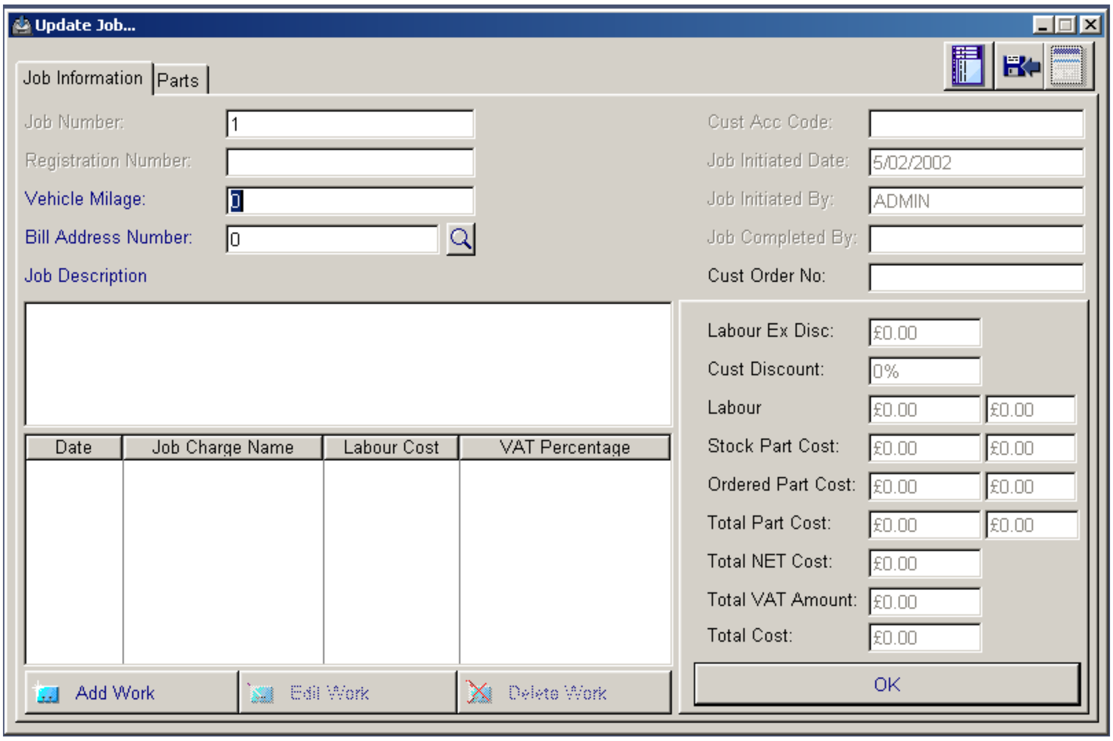


Jobs may also be edited and deleted depending on your security level and job status by using the "Edit Job" button or the "Delete Job" button, or from the menu when you right click on the list box.

Setting up a job card is simple, it allows you to give the mechanic doing the job instructions on what basically needs to be done, the mechanic can then investigate any problems and fill out the job card so that the job may then be processed.



To create the job card, enter the vehicle mileage, the billing address for the job and the basic job description.

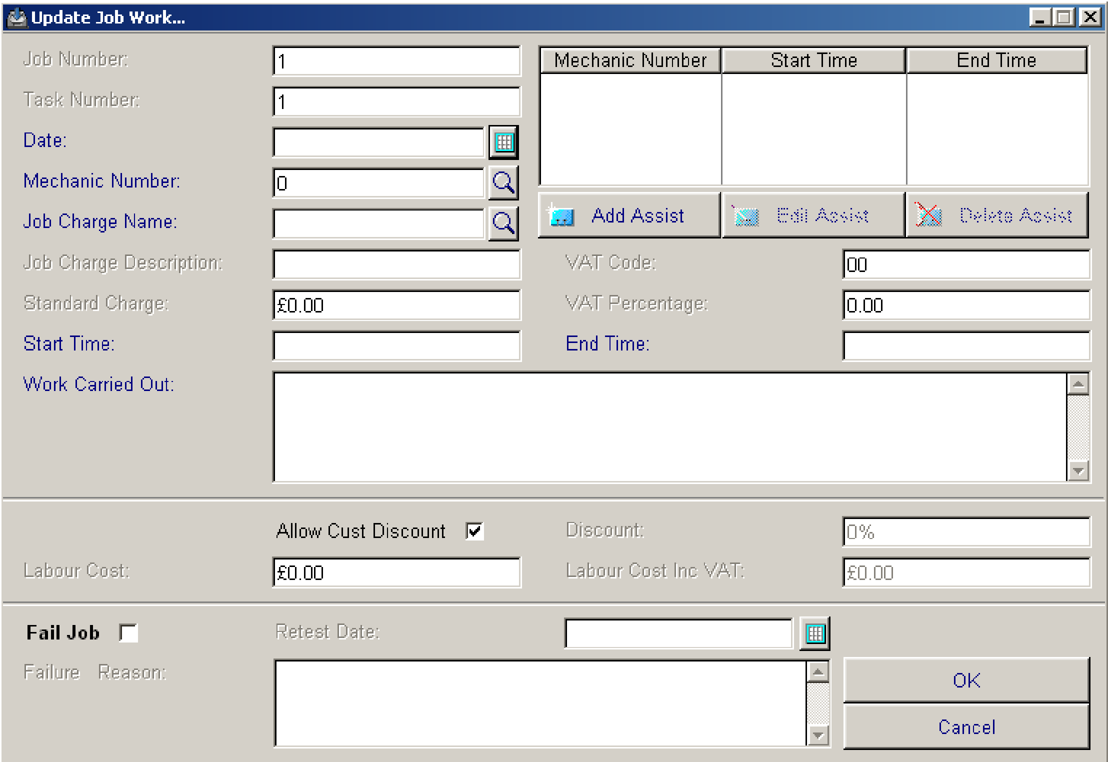
Print Job Cards

Now the job card is ready for printing, select the print job card button in the top right corner of the window, it is the first icon on the left.
Once the job card has been received back from the mechanic with the appropriate parts invoices or delivery notes, then the job may be processed by adding parts and work..

Job Work

To add work to the job click on the “Add Work” button or right click on the list box and select “Add Stock Part”.

Job work may also be edited and deleted depending on your security level and job status by using the “Edit Job Work” button or the “Delete Job Work” button, or from the menu when you right click on the list box.



Start by adding the job details by entering the date, mechanic used and the type of job charge used for this particular task. Now enter the start and finish time of the mechanic (**The times that are entered must be in a 24hr clock format)** and input the work details carried out.

Assisting Mechanics

You may also add assisting mechanics to a job as some jobs take more than one mechanic to do. To add assisting mechanics to the job click on the “Add Assist” button or right click on the list box and select “Add Assist”.

Job work may also be edited and deleted by using the “Edit Assist” button or the “Assist” button, or from the menu when you right click on the list box.

When entering assisting mechanic details, follow the same steps with the job work. Add the mechanic, the start and end time (**The times that are entered must be in a 24hr clock format)** and the work that was carried out.

Job Work Continued

Now all the details have been entered the job cost will be displayed. Here you may keep the customer discount, or remove it. If the Job was a check job, such as a MOT then you may wish to fail the job and give a reason why the job failed. You can do this by putting a tick in the Job Failure tick box. Now you may specify the retest date for that check and the reason why the job failed.

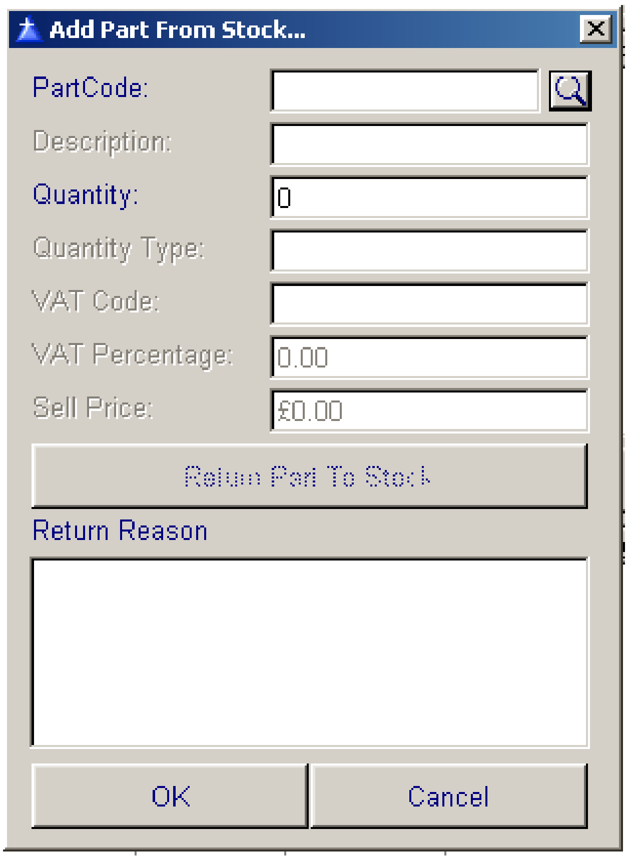
Maintain Job Parts

There are two types of parts that you may add to a job:-

Stock Parts

To add a stock part to the job, select the Parts Tab on the job window, then click on the "Add Stock Part" button or right click on the top list box and select "Add Stock Part".

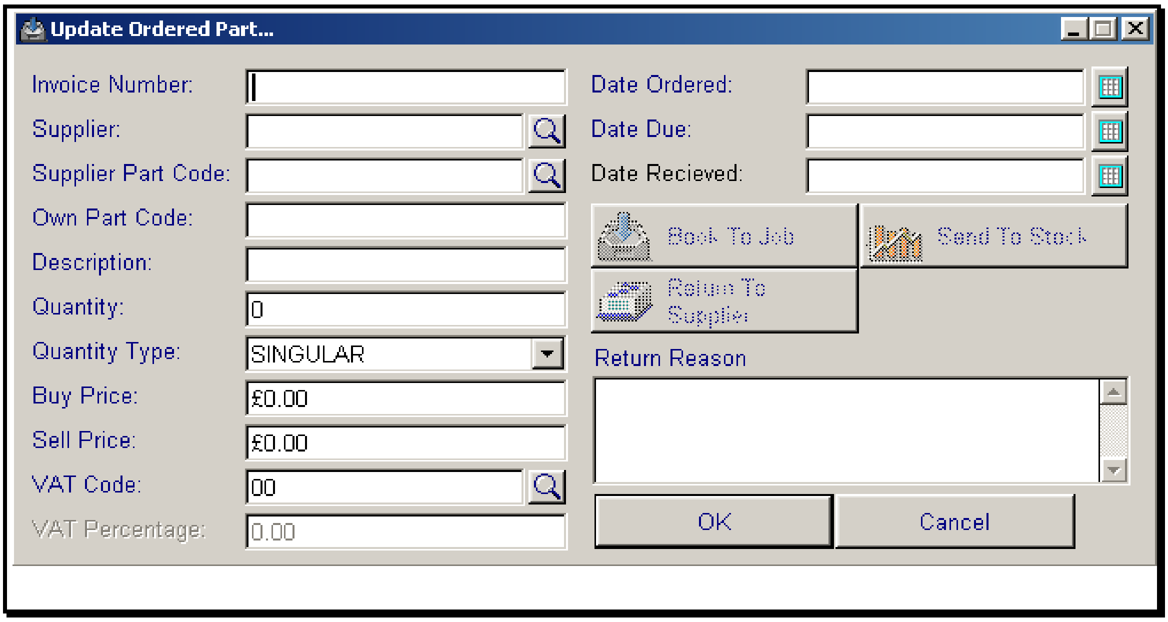
When entering the stock details, select the stock item you wish to add using the "Select Stock" button and the quantity you wish to add may be entered. Click on the "OK" button when you are done.



Stock Parts details may also be edited by using the "Edit Stock Part" button from which you will be able to return parts to stock. **N.B Parts may not be deleted, they can only be returned to stock.** When you click on the "Return To Stock" button the Return reason field will be enabled to allow you to enter a return reason.

Ordered Parts

To add a ordered part to the job, select the Parts Tab on the job window, then click on the "Add Ordered Part" button or right click on the top list box and select "Add Ordered Part".



Ordering parts is similar to adding new stock, simply fill out the details as you would regular stock and enter the date that you ordered the part. The "due date" gives you the date the part will arrive. The important field is the "date received", once the part that has arrived it may be allocated. You may allocate the arrived part directly to the job, send it to stock, or state that it was returned to the supplier. The return reason will be enabled if you have selected that it is to be returned to it's supplier, so that you may state a reason.

Ordered parts details may also be edited by using the "Edit Ordered Part" button from which you will be able to return parts to stock or return them to the Supplier. **N.B Parts may not be deleted, they can only be returned to stock or the supplier.**

Completing Jobs

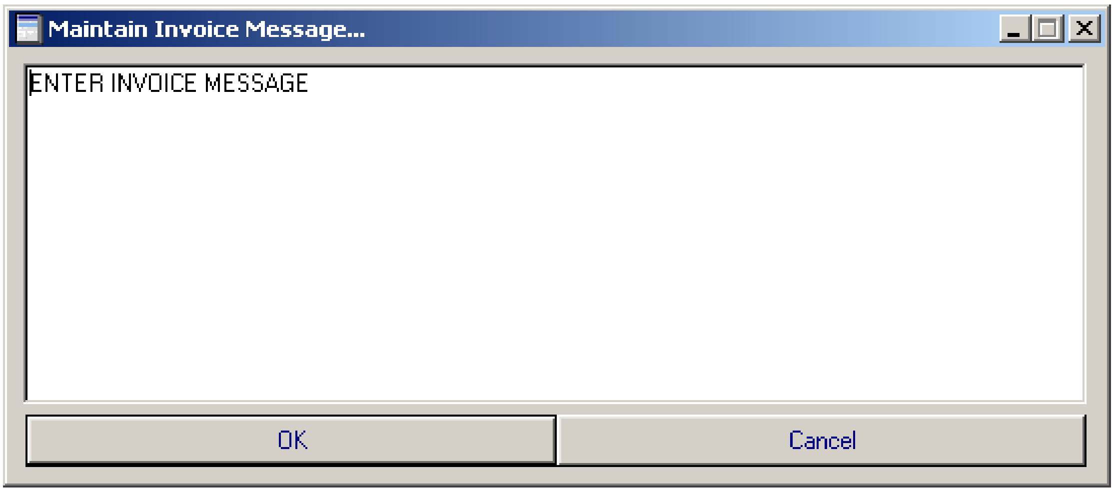
Completing a job basically finishes all actions on that job and it will be disabled except for users with Admin security (level 3). Admin Level users will be able to edit jobs even if they have been completed, up until the point the invoice has been printed. To complete a job, make sure you have filled out all the appropriate job information, and click on the "Complete Job" button located in the top right of the window.

Maintain Completed Jobs (Before Invoices Have Been Printed Only)

If you have Admin level security, then you will be able to edit a job, as if it is a uncompleted job, up until the point where the invoice is printed.

Maintain Invoice Message

This option is for administrators only. To change your invoice message, select "Maintain Invoice Message" from the Administrator pull down menu. The invoice message allows you to add an extra message for your clients at the bottom of the invoice. Simply type in what message you wish to appear and then click on "OK"



Print Invoices

When you print an invoice, no other actions may be taken upon this particular job.
To print the invoice, click on the "Print Invoice" button located at the top right of the window.

Creating and Maintaining Suppliers

Maintain Suppliers

If you are base level user you may not add suppliers. If you are a normal user (level 2) you may click on the add supplier button as shown below. Administrator users may also select "Maintain Suppliers" from the Administrator pull down menu.

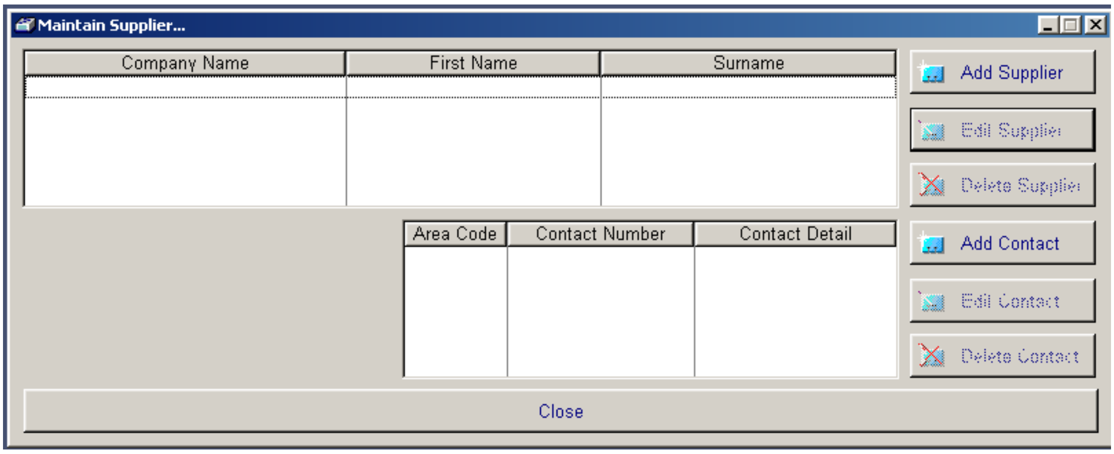
To add a supplier, click on the "Add Supplier" button or right click on the list box and select "Add Supplier" as shown in the screen shot below.

Supplier details may also be edited and deleted by using the "Edit Supplier" button or the "Delete Supplier" button, or from the menu when you right click on the list box

Once in the Supplier details screen you must enter a company name from which the account code for this supplier will be generated. When you are done, click on the "OK" button.

Maintaining Supplier Contact Details

This can be done in much the same way as adding a clients contact details. To add a contact detail, click on the “Add Contact” button or right click on the list box and select “Add Contact” as shown in the screen shot below.



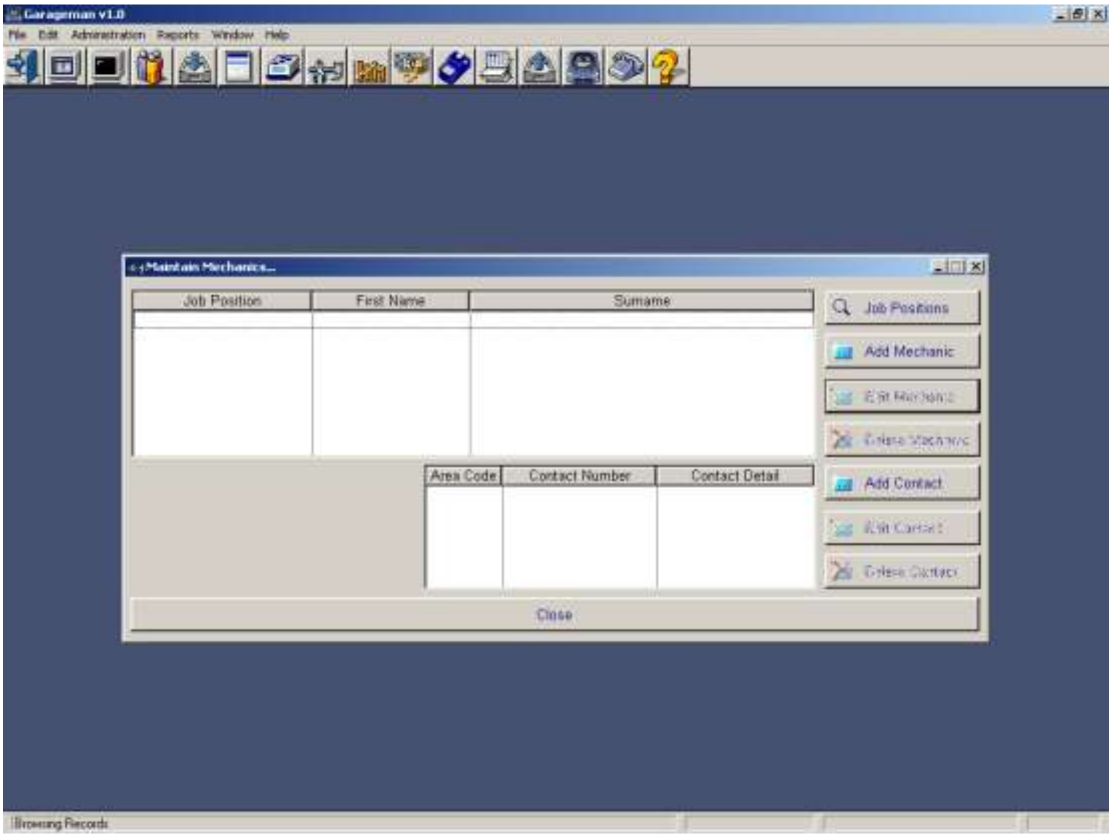
Contact details may also be edited and deleted by using the “Edit Contact” button or the “Delete Contact” button, or from the menu when you right click on the list box.

Entering the details are simple, enter your area code if applicable, then the number and then the description for this number, for example “Office” or “Home Number”.

Creating and Maintaining Mechanics

Maintain Mechanics

If you have base user level, you may not add mechanics. If you are a normal user (level 2) you may click on the add supplier button as shown below. Administrator users may also select "Maintain Mechanics" from the Administrator pull down menu.

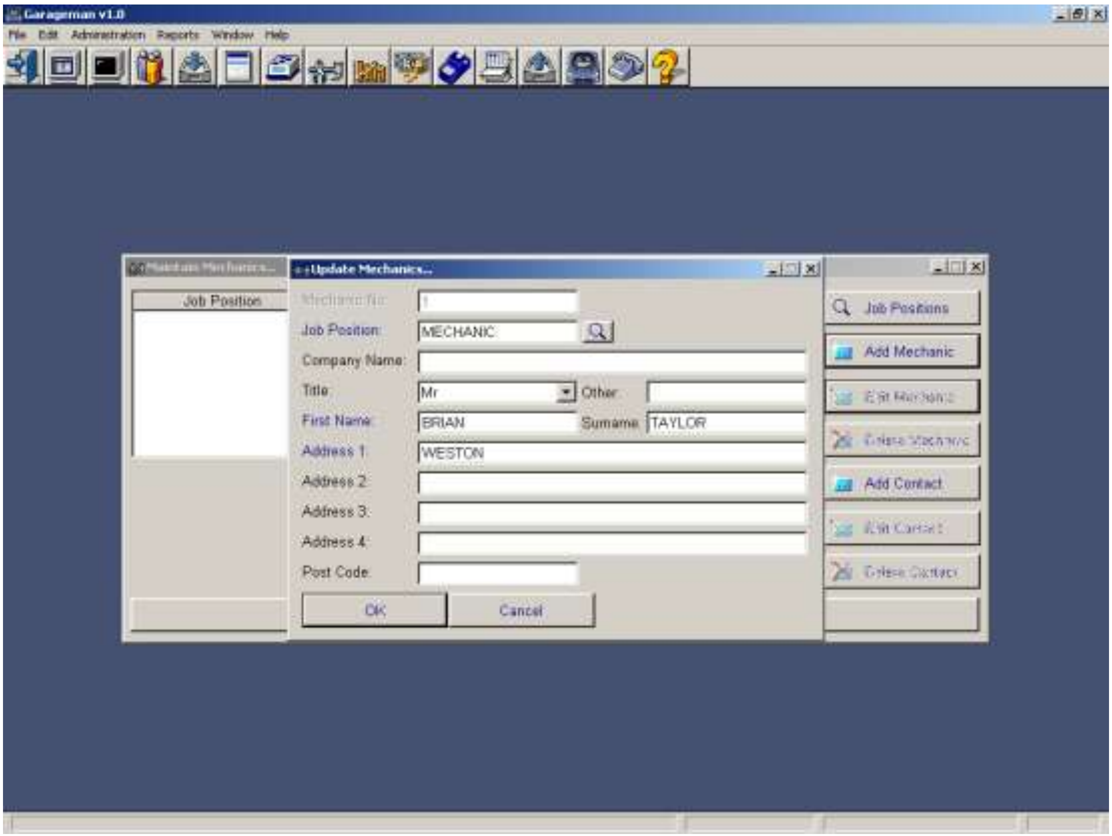


Maintain Mechanics Job Positions

Before you set up your mechanics, you must set up the type of mechanics you have, this can be done by clicking on the "Job Positions" button. From here you may add, edit or delete a job position. To add a job position, click on the "Add Job Position" button or right click on the list box and select "Add Job Position". Now just enter the name of the position, for example "Mechanic" or "Technician" and then the job rate. This is the rate all hourly work will be charged at for any mechanic set up with this job position.

Maintain Mechanic Details

To add a Mechanic, click on the "Add Mechanic" button or right click on the list box and select "Add Mechanic" now use the select button as shown below and select the job position that you want to give this mechanic. The "Job Position", "First Name" and "Address1" must be filled out for each mechanic. When you are done, click on the "OK" button.



Maintain Mechanic Contact Details

This can be done in much the same way as adding a clients contact details. To add a contact detail, click on the "Add Contact" button or right click on the list box and select "Add Contact" as shown in the screen shot below.

Contact details may also be edited and deleted by using the "Edit Contact" button or the "Delete Contact" button, or from the menu when you right click on the list box.

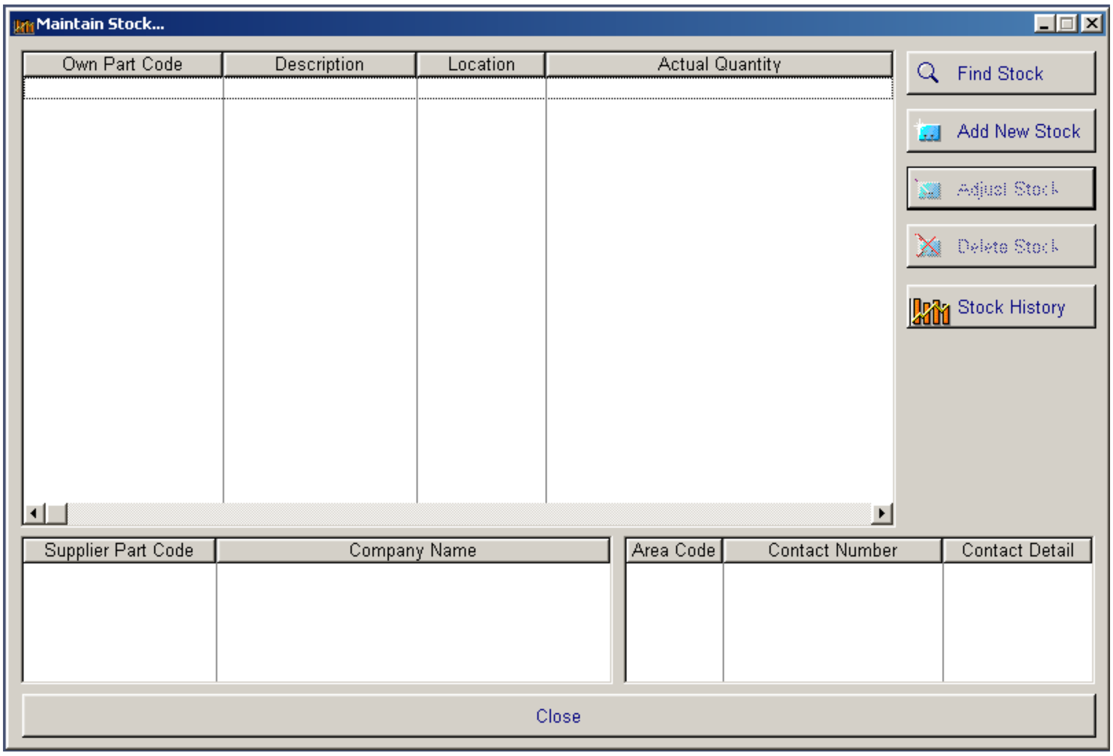
Entering the details are simple, enter your area code if applicable, then the number and then the description for this number, for example "Office" or "Home Number".

Stock Management

Maintain Stock

If you are base level user you may not add stock. If you are a normal user (level 2) you may click on the "Maintain Stock" button as shown below. Administrator users may also select "Maintain Stock" from the Administrator pull down menu.

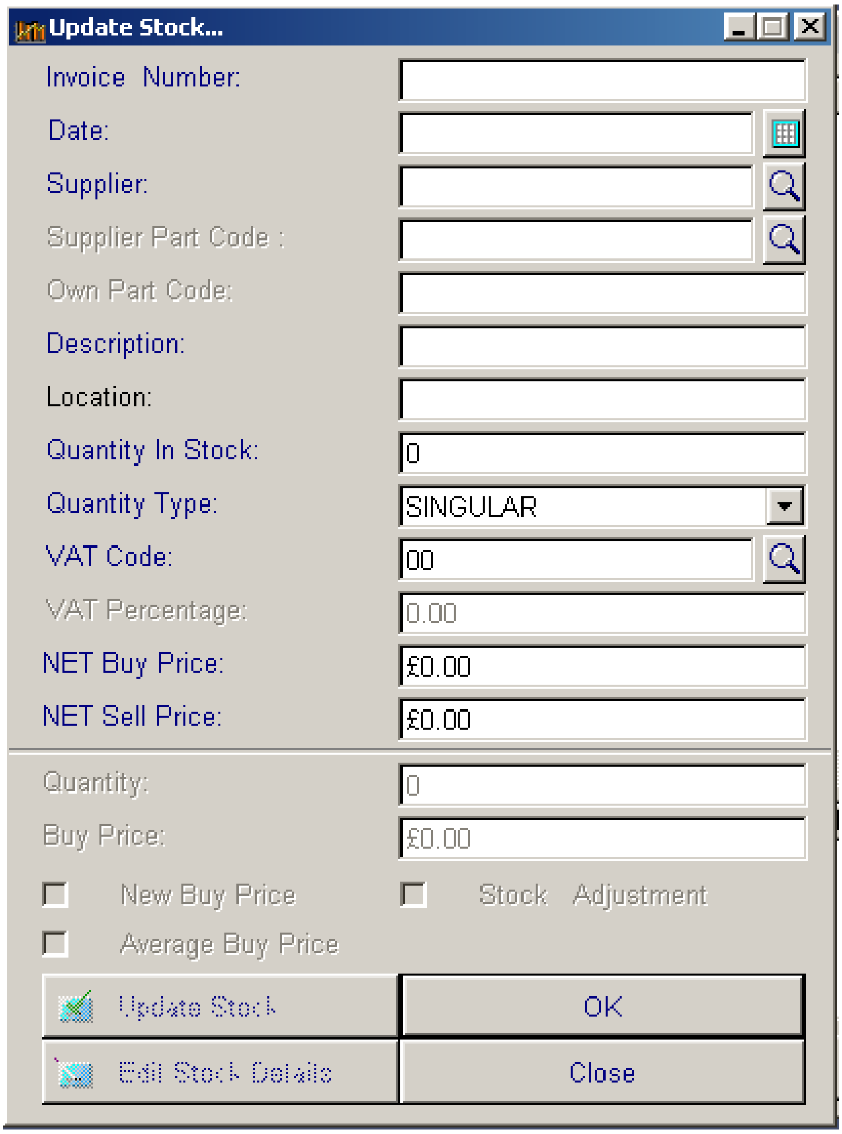
To add a new stock item, click on the "Add Stock" button or right click on the list box and select "Add Stock" as shown in the screen shot below.



On the stock details screen, enter the invoice number, or the delivery number for the part, the supplier and the date. Next enter the supplier part code by using the select button. See below to find out how to set-up supplier part codes.

Next enter a description for the stock item, the location that the stock is kept, for example "Bin 1" and the quantities. The VAT code can be selected and will be the amount of VAT that is charged on each part of this type. The buy price is the price of the part excluding any VAT and the sell price denotes the sell price excluding VAT. The sell price may automatically be calculated from the parts mark-up value that has been set (See "Maintain Parts Mark-Up Value")

To Adjust stock levels, click on the “Adjust Stock” button or right click on the list box and select “Adjust Stock”



There are several things you can do whilst adjusting stock.

Add To Stock – When adding to stock, simply follow the same procedures, as you would adding a new stock item, except some areas will be disabled, as the stock item already exists. Two new features are also available here, you may set the buy price again by using the buy price you are currently entering, or you may use an average of all buy prices entered into stock. These options allow you to manage your margins the way you require for each individual stock item. When you have finished filling out the fields and wish to update the stock, click on the “Update Stock Button”.

Making Stock Adjustments – To make a stock adjustment click on the "Stock Adjustment" tick box, enter the date and the quantities of the stock to be added or subtracted.

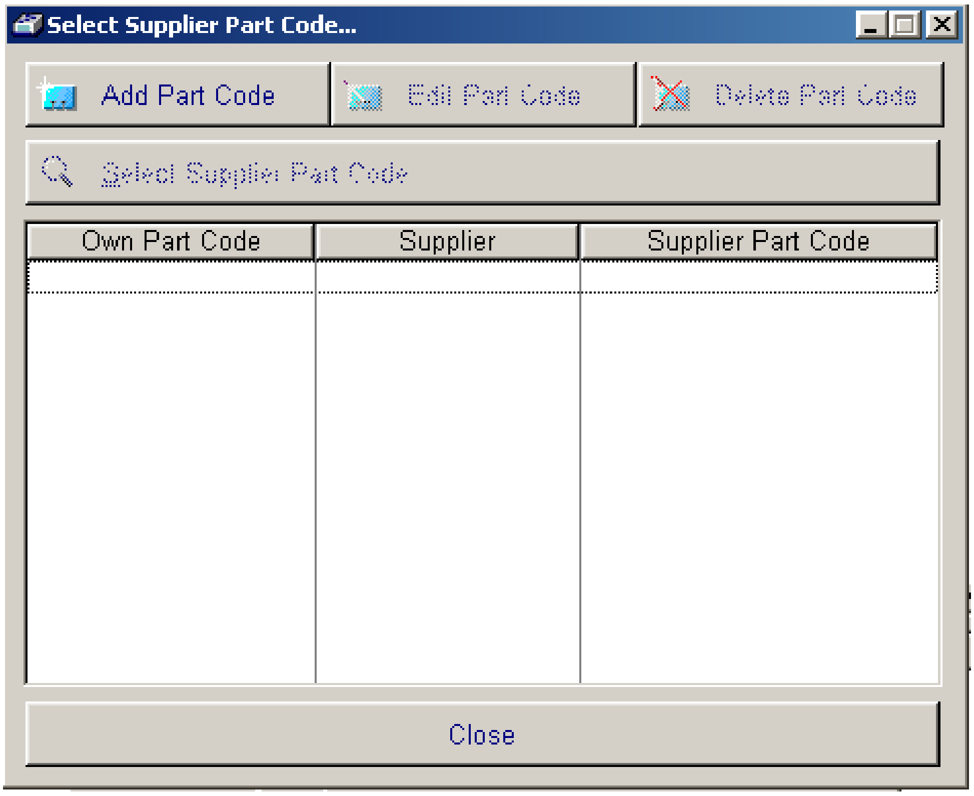
Edit Stock Details – By clicking on the "Edit Stock Details" button you may edit the description, location, VAT code and sell price for this stock item. When you are done, click on the "OK" button.

To delete stock, click on the "Delete Stock" button or right click on the list box and select "Delete Stock"

Supplier Part Codes

Supplier Part Codes allow you to quickly lookup parts for re-order by using the part code the supplier uses.

To add a supplier part code, click on the "Add Supplier Part Code" button or right click on the list box and select "Supplier Part Code" as shown in the screen shot below.



Now enter the supplier part code and click on the "OK" button. As you will now be using the part code, click on the "Select Supplier Part Code" button. If you already have part codes set up, you may simply highlight them and click on the "Select Supplier Part Code" button.

Supplier part code details may also be edited and deleted by using the "Edit Supplier Part Code" button or the "Delete Supplier Part Code" button, or from the menu when you right click on the list box.

Stock History

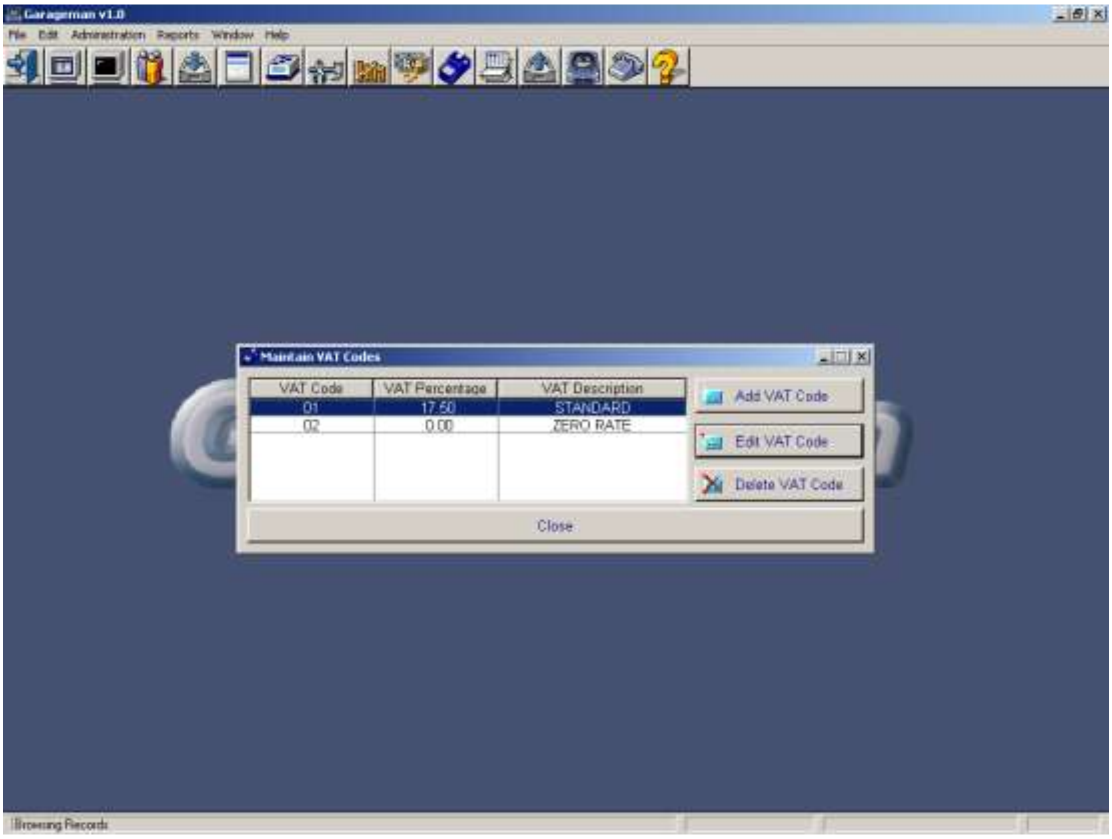
To view the stock history of a particular item, select the stock item and click on the "Stock History" button. This will bring up a window displaying all transactions for this stock item, by date. You may view the stock transaction in a more detailed way, by double clicking on the transaction in the list box, or by selecting the transaction and clicking on the "View Part Transaction" button.

Maintaining VAT Codes

Maintain VAT Codes

If you a base level user you may not set-up VAT Codes. If you are a normal user (level 2) you may click on the Maintain VAT Codes button as shown below. Administrator users may also select “Maintain VAT Codes” from the Administrator pull down menu.

To add a VAT Code, click on the “Add VAT Code ” button or right click on the list box and select “Add VAT Code” as shown in the screen shot below.



Contact details may also be edited and deleted by using the “Edit VAT Code” button or the “Delete VAT Code” button, or from the menu when you right click on the list box.

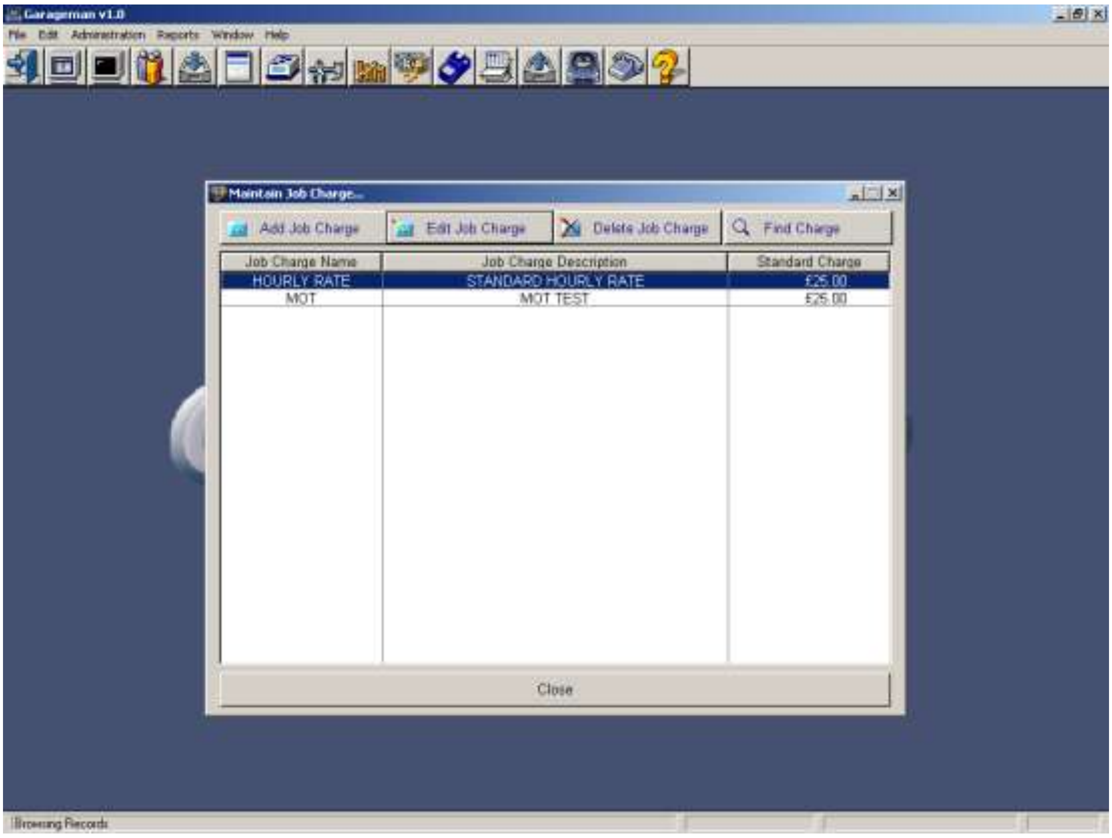
When entering your VAT Code details, you must enter a 2 digit code to Identify the VAT amount by, the percentage of VAT and the description, for example” Standard” or “Zero Rate”.

Set Your Job Charges

Maintain Job Charges

If you are base level user you may not set-up Job Charges. If you are a normal user (level 2) you may click on the Maintain Job Charges button as shown below. Administrator users may also select "Maintain Job Charges" from the Administrator pull down menu.

To add job charges, click on the "Add Job Charges" button or right click on the list box and select "Job Charges" as shown in the screen shot below.



Job Charges may also be edited and deleted by using the "Edit Job Charges" button or the "Delete Job Charges" button, or from the menu when you right click on the list box.

Setting up your job charges is vital. If the job charges are not set-up correctly, you may not be charging your clients correctly and updating their vehicle details.

First, enter a name for the charge and the description. The standard charge will be the amount charged, as either a fixed charge, or as an hourly rate. Now select the VAT code. This will determine what rate of VAT will be added for this type of charge. Entering a average job time is optional, it can be used for determining how well your mechanics are doing on certain types of work. Finally you must select the type of work this charge is for.

MOT – This specifies a MOT Job, it is a fixed rate job, so your client will only be charged the rate you specified in the standard charge field. All MOT jobs must use this option, as it will update your client's vehicle details with the date of this new MOT check.

PMI – This specifies a PMI Job, it is a fixed rate job, so your client will only be charged the rate you specified in the standard charge field. All PMI jobs must use this option, as it will update your client's vehicle details with the date of this new PMI check.

TACHO – This specifies a TACHO Job, it is a fixed rate job, so your client will only be charged the rate you specified in the standard charge field. All TACHO jobs must use this option, as it will update your client's vehicle details with the date of this new TACHO check.

Service - This specifies a Service Job, it is a fixed rate job, so your client will only be charged the rate you specified in the standard charge field. All Service jobs must use this option, as it will update your client's vehicle details with the date and mileage of this new Service check.

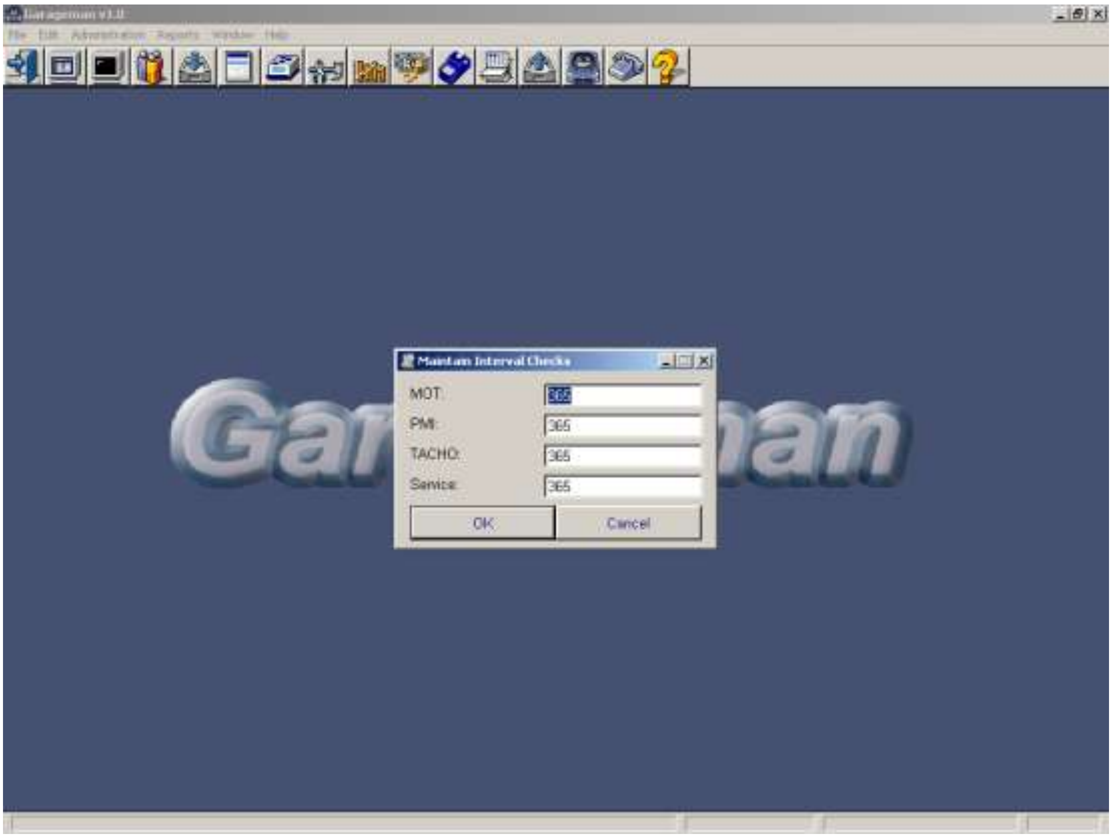
Fixed - This specifies a fixed rate job, so your client will only be charged the rate you specified in the standard charge field.

Hourly - This specifies an hourly rate job, so your client will be charged the rate you specified in the standard charge field per hour of work.

Setting Testing Times

Maintain Check Intervals

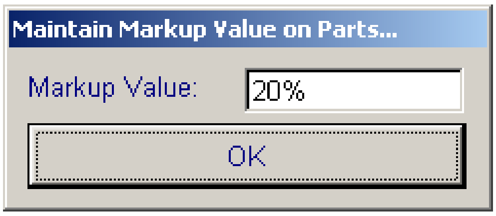
This option is for administrators only. It determines the amount of days between each check on a vehicle. To change Interval Check frequency, select “Maintain Interval Checks” from the Administrator pull down menu and then enter the value in days between each test.



Setting Your Mark-up On Parts

Maintain Parts Mark-up Value

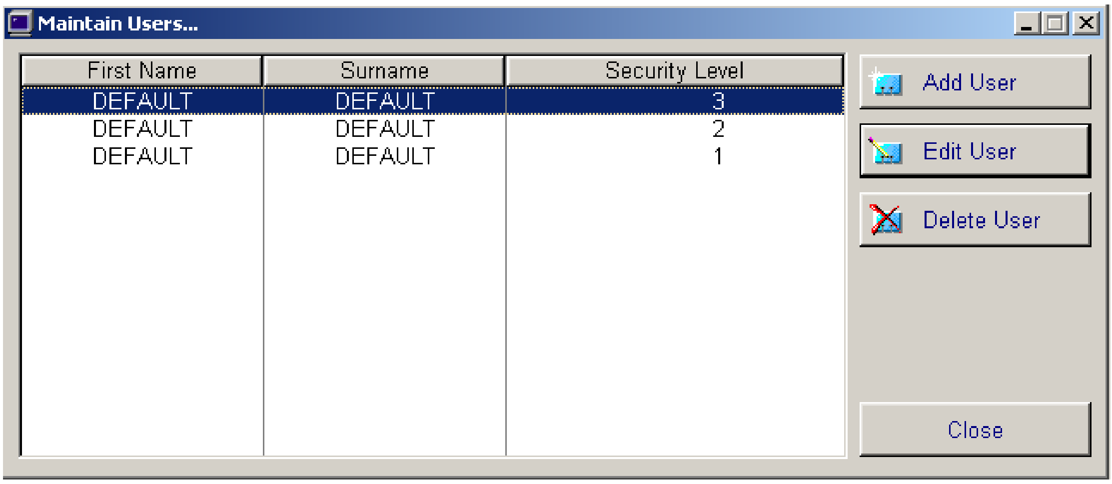
This option is for administrators only. To change your parts mark up value, select "Maintain Parts Mark-Up Value" from the Administrator pull down menu and then enter the percentage you wish as the default mark up value.



Setting Up users and their Security Levels

Maintain Users

This option is for administrators only and is only available from the Administrator pull down menu. To add a user, click on the “Add User” button or right click on the list box and select “Add User” as shown in the screen shot below.



Users may also be edited and deleted by using the “Edit User” button or the “Delete User” button, or from the menu when you right click on the list box.

Here you must enter all fields for the user. The username and password are used to log into Garageman. The security level determines what features may be accessed in Garageman as described in the section “Garageman Security” in this manual.

The Reports

Quick View Jobs – By clicking on the Quick view jobs on the toolbar, you may view a list of all the jobs.

Quick View Invoices - By clicking on the Quick view invoice on the toolbar, you may view a list of all the invoices, search for invoice or print them.

Quick View Vehicles - By clicking on the Quick view vehicles on the toolbar, you may search and view a list of all the vehicles and basic details.

Quick View Contact Details By clicking on the Quick view contacts on the toolbar, you may search and view a list of clients and their contact details.

Client List Report - This report will print a list of all customers and their contact details.

Vehicle List Report – This Report will produce a list of all customers and their vehicles.

Vehicle History Report – This report will provide you with a list of vehicles and all jobs that have been done on the vehicle. You can search for vehicles and print out the report.

Vehicle Testing Report – Specify a date range and a report will be produced giving a list of all vehicles that have a check required within the date ranges you set.

Job List Report – This will produce a list off all jobs by job number.

Invoice List Report – Search for, view or print a invoice.

Supplier List Report – This will produce a list of all suppliers and their contact details.

Mechanic List Report – This will produce a list of all mechanics and their contact details.

Mechanic Efficiency Report – Enter date ranges to view/print a list of mechanics and all jobs/assists that they did during the date range set.

Stock List Report – This report will produce a list of all stock.

Stock Valuation Report – This report will provide a list of stock values.

Parts On Order Report – Print/View parts on order and which supplier the parts are from.

Returns Query Report - Print/View parts that have been returned.