GA2

GARAGE ASSISTANT 2

Garage Assistant® GA2™ User Guide

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1 How to Log In

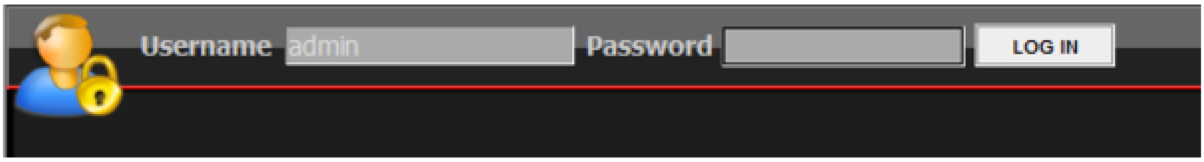
Each time you load up Garage Assistant GA2 you will be asked to log in.

You will also be asked to re-login after a specific period of in-activity, as GA2 is set by default to log out after 1 hour.

If your a new user, you will need to log in using the default details, however these can be customised along with adding additional users and access restrictions.

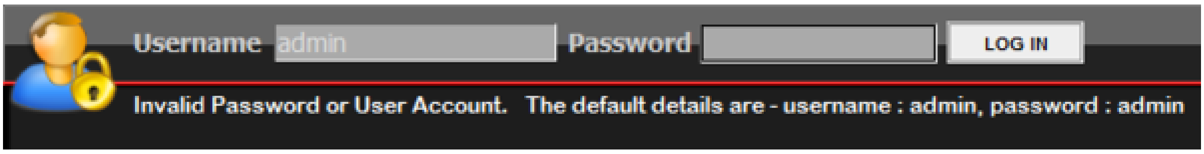
The default username and password is as follows :

Username : admin
Password : admin



The Password field will not show what you are typing, to prevent others from seeing what you enter

If you enter the incorrect details when trying to log in, GA2 will show a message below the log in area to inform you of this, also showing the default details. Once



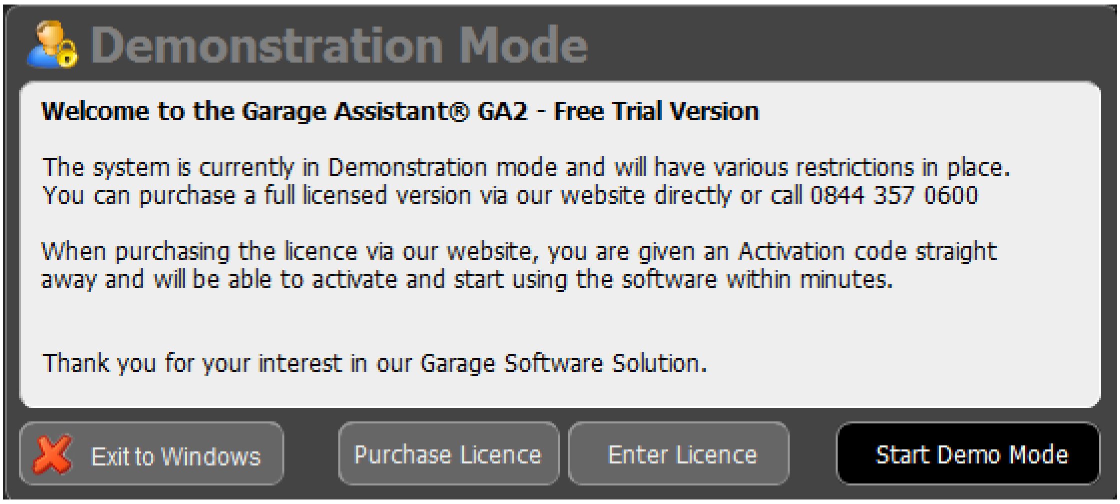
For information on setting up user accounts, please see the User Accounts section of this guide

2 Setup and Customisation

2.1 Setup Wizard

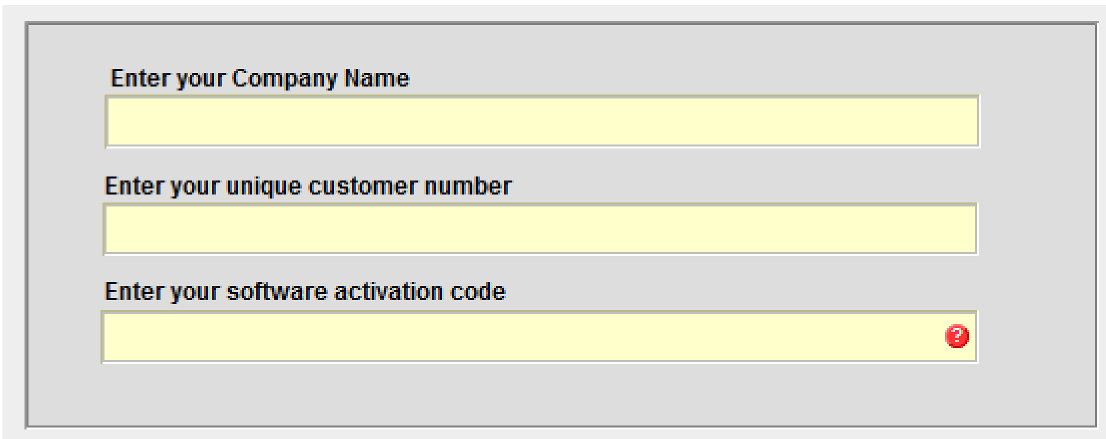
2.1.1 1. Software Activation

When you first run GA2 it will be in Demonstration Mode, you will be presented with the following box on the welcome screen allowing you to start in Demo Mode or Enter your Licence information.



Click on Enter Licence to proceed to the **Setup Wizard**, You can also run the setup wizard from by logging into GA2 as admin / admin then clicking on the Admin icon in the top right of the screen, followed by Setup Wizard.

The first step in the setup wizard is to enter your company details we provide, either via the Activation letter received with your CD-Rom or via your online members area, under the tab labelled ***your software***.



Once all your details have been entered correctly on the activation screen you will need to click the ***Activate Your Software*** button

If an error occurs such as the registration code does not match the Registration Name please double check what you have entered for accuracy ensuring that zeros and letter o's are correctly entered, skipping activation will leave the system in demonstration mode with all restrictions in place.

2.1.2 2. Company Details

This page will allow you to enter your company details, this information will be printed on your documents created within Garage Assistant. However you can add extra information as required via the document customiser later, Your are not required to enter data into all of the boxes

If you wish to change your details, please make these changes under document customiser as well as this section.

You are also given the opportunity to enter your email address. This will be used as the 'reply' address for your customers if you choose to send any documents by email.

> Your email address is used when emailing documents from GA2 to allow your customers to reply directly to you, failure to set this correctly will mean your customers may not be able to respond.

2.1.3 3. Invoice Layout

Step 3 gives you the opportunity to select from different style and layout invoices, we currently have a selection of portrait layouts and a landscape layout with further options for each.

The portrait layout allows you to customise the letter head and provides an overall more flexible invoice allowing a huge amount of list items per invoice, whereas the Landscape layout is fairly limited such as not allowing the header to be customised and limiting the space for labour / parts list items.

A Separate advisor sheet can be printed, rather than it being included on the bottom of the invoice, however this is only applicable to portrait style 1 and style 9
You can also choose to print a paid stamp on invoices which are showing as paid in full, although this is not currently available when using Style 9 or any Landscape layout

Below is a quick comparison of the different styles, an x in the box indicates which style contains this ability

Style	1	2	3	4	5	6	7	8	9
Landscape		x		x					
Portrait	x		x		x	x	x	x	x
Customisable Letter Head	x		x		x	x	x	x	x
Over 200 Line items per section	x		x		x	x	x	x	x
Dynamic Size and Page Length	x		x		x	x	x	x	x
Multiple pages	x	2	x	2	x	x	x	x	x
Offset customer address (for envelopes)	x	x	x	x		x	x	x	x
Grey section headings	x	x		x	x	x	x	x	x
Dividing Lines between each list item	x	x	x	x	x		x	x	x
Vehicle Details section across the page	x		x			x	x	x	x
Vehicle Details section in the top right					x				

Style	1	2	3	4	5	6	7	8	9
Can contain Description of Work	x	x	x	x	x	x	x	x	x
Can contain Terms & Conditions	x		x		x	x	x	x	x
Can contain advisors on same sheet	x	x	x	x	x	x	x	x	x
Can contain advisors on separate sheet	x								x
Dynamic Totals (show only what is required)	x		x		x	x	x	x	x
Can display both available vat rates							x		
Totals wrap to bottom of the page		x		x					x
Can print a paid stamp	x		x		x	x	x	x	

2.1.4 4. Worksheet Layout

Step 4 gives you the opportunity to select from different style and layout for your worksheets, Style 3 is the most flexible allowing more items to be listed, whereas Style 2 is a fixed size.

Below is a quick comparison of the different styles, an x in the box indicates which style contains this ability

Description	Style 1	Style 2	Style 3	Style 4
Landscape	x			x
Portrait		x	x	
Unlimited Line Items		x	x	
Dynamic Size and Page Length		x	x	
Customisable Letter Head		x	x	
Displays company name				x
Displays figures				x

2.1.5 5. Estimate Layout

Step 5 gives you the opportunity to select from different layout for Estimates, we currently have a portrait layout and landscape layout.

Below is a quick comparison of the different styles, an x in the box indicates which style contains this ability

Description	Style 1	Style 2
Landscape	x	
Portrait		x
Unlimited Line Items		x
Dynamic Size and Page Length		x
Customisable Letter Head		x

2.1.6 6. Estimate Storage

GA2 allows you to choose whether you want estimates to remain on your system after converting to an invoice or if you want them removed.

If you choose NO, once an estimate has been converted it will be removed completely from your system.

If you choose Yes you will then be able to quickly view the original estimate from within the invoice screen, this can be useful to help sort out disputes over estimated charges and the final invoiced charges.

TIP Storing estimates will increase the size of your database over time and is not essential unless you wish to keep these records.

You can also set the default Valid to period for estimate.

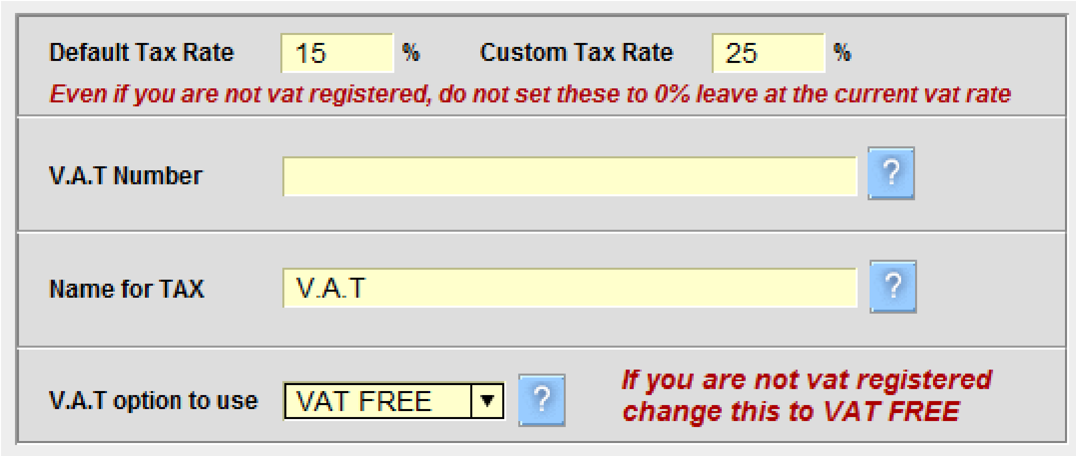
When the estimate expires, it remains on system however is hidden from the front main menu page, it can be found by listing all estimates, or searching by specific details.

The principle behind this is to keep your documents in progress sections relatively clutter free by selectively hiding older documents.

2.1.7 7. Vat and Year End

Here you can define your VAT number, Standard Tax rate and also a custom tax rate (more commonly referred to as reduced rate)
These rates are selectable on the invoice screen by using a drop down box next to each line item.

If you are not VAT registered, leave the vat rates set as normal, however ensure from the drop down box you choose 'VAT FREE'
This will ensure that each line item you add will automatically include VAT FREE without you having to select it on each occasion.

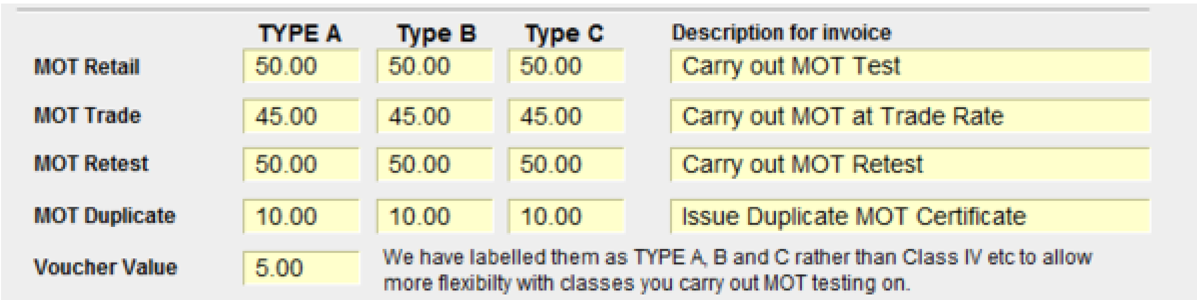


> Your VAT number will need to be manually added to your document templates via the Document Customiser section in the Admin area if you are using Portrait styled documents, however this is preset on the landscape layouts

The year end allows you to produce reports by your financial year, rather than Jan to December, you are able to change this at any time and are not required to enter the information into this field.

2.1.8 8. MOT and Labour Rates

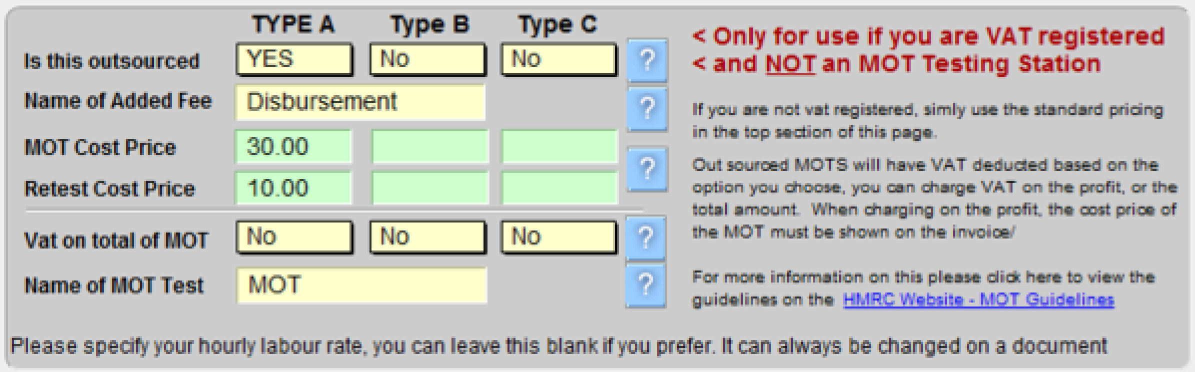
This step allows you to configure Garage Assistants Quick MOT prices and set your VAT rate if applicable.
There's 3 columns for MOT pricing, these are labelled on the invoice screen as Type A, B and C and can be set to individual prices.



If you carry out different classes of MOTs you can set each type to contain the appropriate fees for up to 3 classes, we have not defined a class to allow flexibility, if however you only carry out MOTs on one class of mot we recommend setting each column the same price.

On the invoice screen you can quickly select whether or not an MOT has been carried out and the price is automatically added, Trade price can also be selected along with a promotional discount, please set all these prices at the appropriate rates along with descriptions to be printed on the invoice.

Further to this, if you are NOT an authorised MOT Testing station, you can also specify options for outsourced pricing, which allows GA2 to produce a correctly formatted invoice in line with HMRC regulations.



By setting the field to yes for 'is this outsourced and entering the actual cost price of the MOT Test, GA2 will automatically work out the profit involved and the amount of VAT to show on your invoice based on these figures. It is recommended to leave the VAT on total MOT set to NO, since this means you are only charging VAT on the actual profit you make on the MOT

The Common Hourly Labour Rate section is a useful addition which automatically inserts a price onto your invoice line items, this price can be changed from the invoice screen by just over typing, its more of a time saving device to save you having to enter a preset price each time and select the applicable VAT option.

You can leave these fields blank if you do not wish to use them, however you must then ensure you do not enter any lines of labour with zero labour charges by mistake.

2.1.9 9. Statement Settings

This allows you to choose how your Account customers statements are printed and lets you add terms to the bottom of each statement.

Please review and enter any information you feel necessary however you can only type in the area you can see, if you cant see it on screen it wont print on a statement.

> TIP: The landscape layout includes an addition side box for a remittance advise slip which can be cut of and returned to you with payment

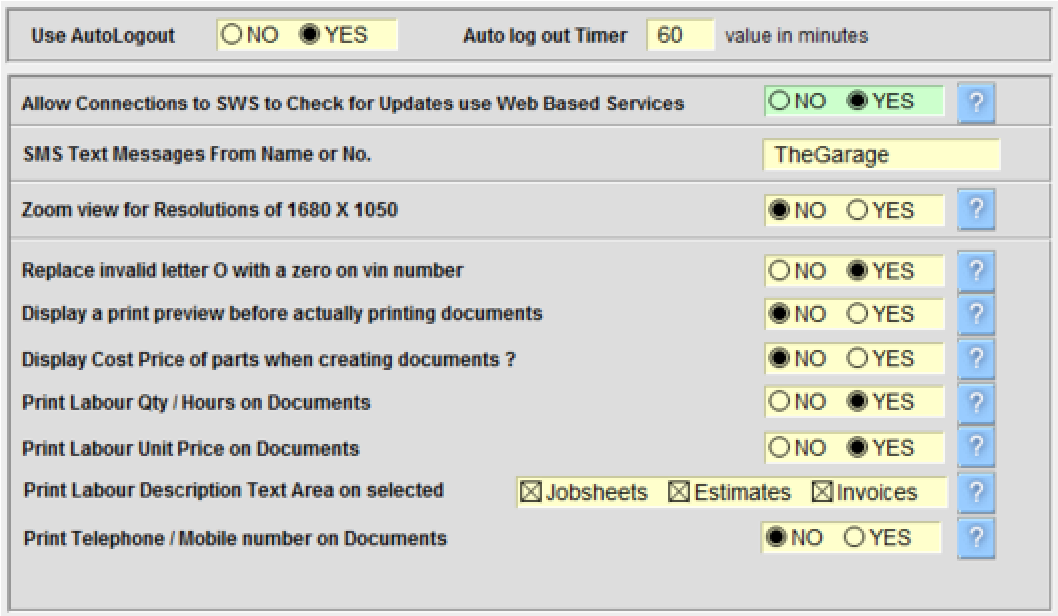
2.1.10 10. Miscellaneous Options

You can allow the system to auto log out of your account if inactive for a period of time, this is set in minutes and the default is 60 minutes.

We recommend using this feature to ensure your system remains secure during in-activity.

As a protective measure, the system will also shut down 4 hours after auto logging out, this helps prevent data corruption in case of a power cut, especially if your computer systems are permanently left on

There are also a variety of other options available in this section as shown below.

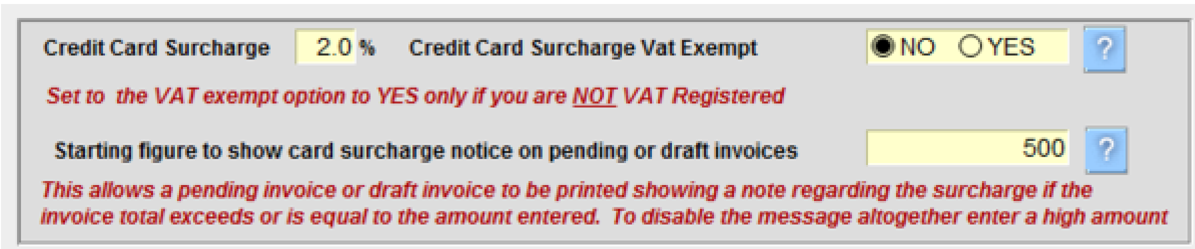


Although most are self explanatory, there is an individual help button to give you guidance on each item.

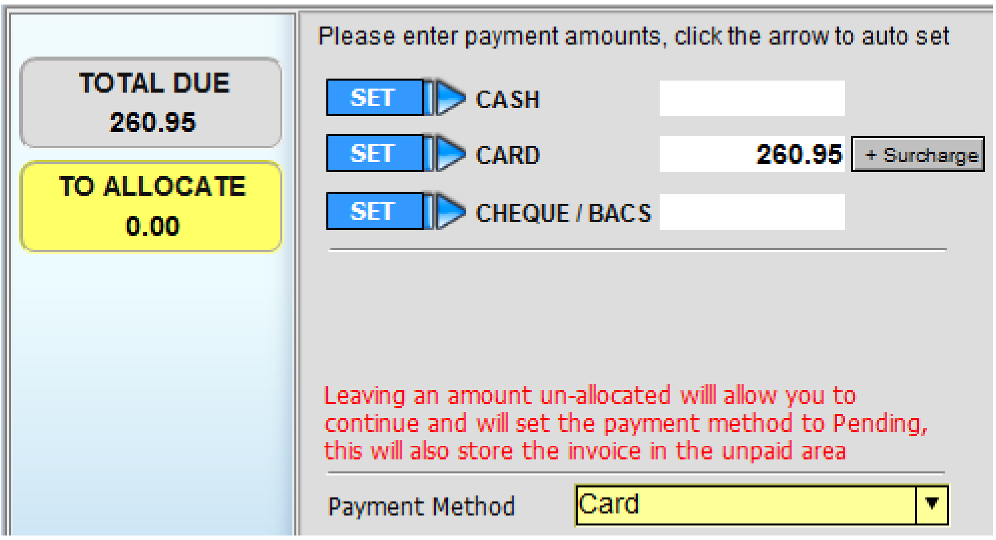
2.1.11 10b. Miscellaneous Options

A new addition to GA2 is the ability to add credit card surcharge amounts to invoices over a specific amount, the setup wizard allows you to specify the percentage, whether this should be vat exempt or not (usually not unless you are not vat registered) and also the minimum amount an invoice should be, before the surcharge notice is displayed

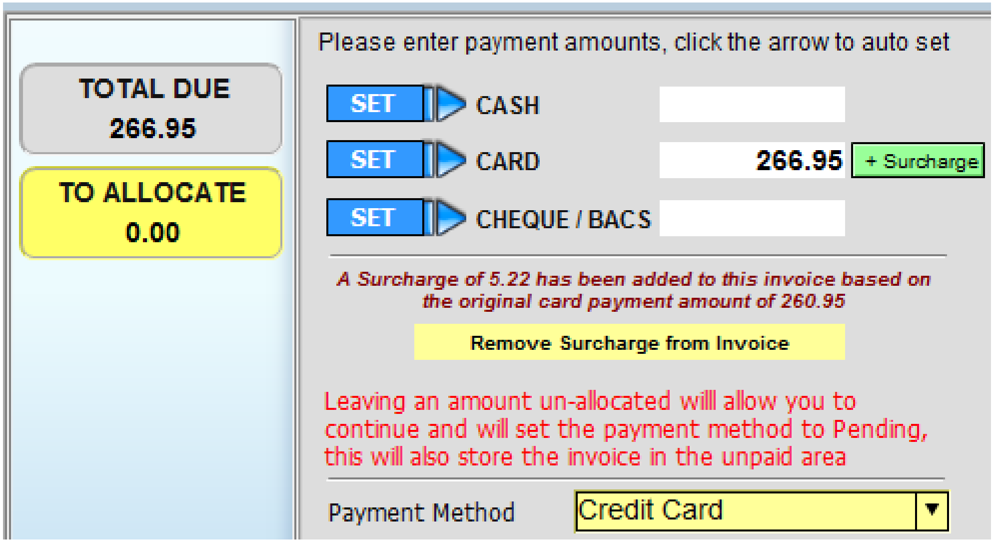
Once this is set, any new documents created will store a reference to the percentage and allow you to add or remove the surcharge as you see fit.



An example of a surcharge in use :



Above shows the total invoice, with the payment set to Card, to include a surcharge to this document you can now click the + Surcharge option, will change the figures to those shown below and give a notice on screen that the surcharge is now added



TIP	The surcharge option is available on standard invoices only however is never enforced You must manually click the + surcharge button when on the payment entry screen

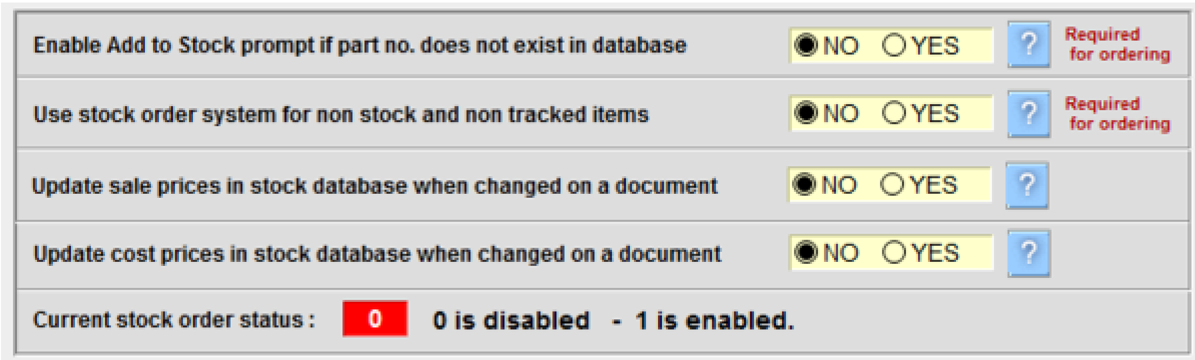
There are also some additional options involving the mail shot system, allowing you to specify which reminders will re-schedule and which will not, this allows more control over the 4 different vehicle reminders in the system.

2.1.12 11. Stock Control Settings

If you intend on using stock control and tracking item quantities, GA2 includes an easy to use order management system which generates supplier orders as you create invoices, this helps you keep track of what items you have ordered and what items you are waiting for.

The options on this page allow you to enable the ordering system for items which are not tracked, so even though the quantities in stock can remain at 0, you can still take advantage of the ordering system.

There's two buttons to easily enable the correct options as shown above, alternatively you can manually specify the options depending on your needs



Enable Add to stock prompt for non existing part numbers
With this enabled, any part number you enter onto a document which doesn't already exist in your stock system can be added as non tracked for future use.

Use stock order system for non tracked & non stock items
With this enabled, items not listed in stock or those listed with tracking disabled will still be processed for order management.

Update sale prices in stock database when changed on a document
With this enabled if you change the retail price of an item whilst creating a document, the stock item will also be updated for future use.

Update cost prices in stock database when changed on a document
With this enabled if you change the cost price of an item whilst creating a document, the stock item will also be updated for future use.

TIP	Current stock order status is a quick visual check to let you know if it is turned on or off, Various options will cause this to disable since they are required to be set to yes for it to work correctly.

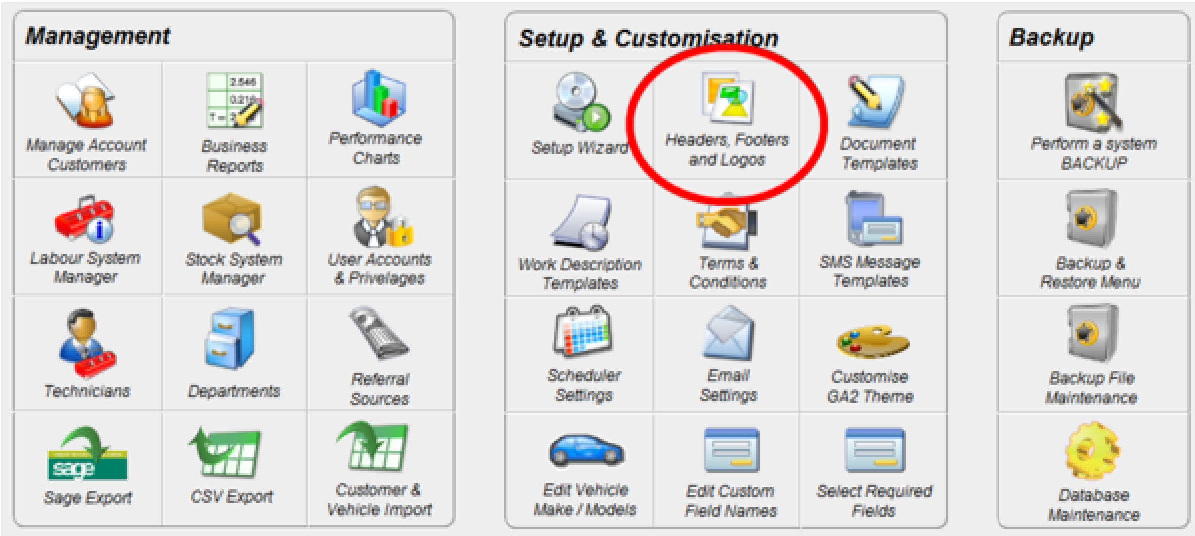
2.2 Further Customisation

2.2.1 Headers Footers & Logos

Customising your documents is straight forward, we have provided a few areas for custom content, such as the left of the Sub Totals box on Portrait invoices you can enter any terms or promotions to be included on all invoices issued.

This can be done by going to

1. Admin
2. Headers Footers and Logos



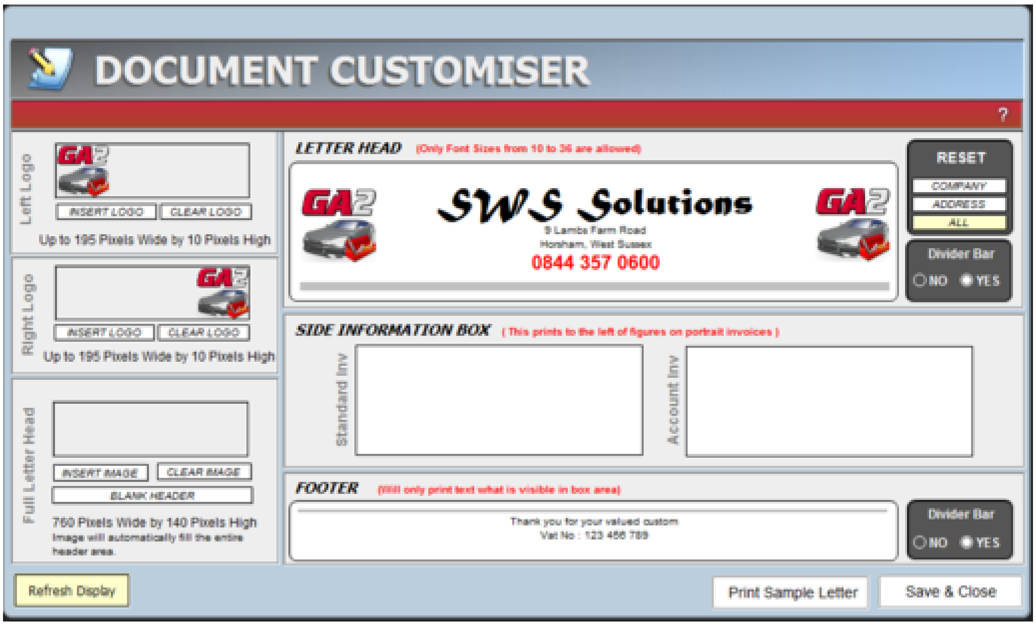
You can also insert a custom letter head, or manually edit the sizes, colours and position of your company details to improve the look of your documents including invoices & MOT / Service reminders.

You can insert a graphic file in Jpeg, Png or GIF format to be used as a custom letter head, the dimensions for this must be similar to 760 X 140 pixels for optimised printing.

To insert an image, simply click "insert image" next to the relevant section on the left, then browse your computer for the appropriate image to insert.

If you don't have an image to insert here you can completely format the text to print exactly as your require using our custom header creator built in.
This feature may take a bit of getting used to but gives you the flexibility to be creative by choosing various font types, sizes and colours in a similar way to creating a word document.

Custom Logos & Letter Heads



The above screenshot shows the letter head with a custom font, coloured telephone number and logo either side to demonstrate.

You can insert a graphic file in Jpeg, Png or GIF format to be used as a custom logo which will be placed either to the left or right of your company details, the dimensions for this must be similar to 195 X 10 pixels for optimised printing.

To insert an image, simply click "insert logo" for the side you wish to use then browse your computer for the appropriate image to insert.

When editing the text of the letter head, it is important to note that you cannot change the company name, this will result in an error. If you receive any error messages in the preview area, click on the rest button to the right.

To edit the text, simply highlight it by dragging your mouse over the top until it appears inverted, then choose the appropriate sizes / colours / font styles from the toolbar along the top of the screen.

We recommend choosing the "Print Sample" button to ensure it prints correctly.

TIP	When you insert a custom letter head image for use in GA2, a bar will appear below your image containing the wording "Document Issued by - Your Company" This is a protection feature in GA2 and cannot be removed.

2.2.2 User Accounts

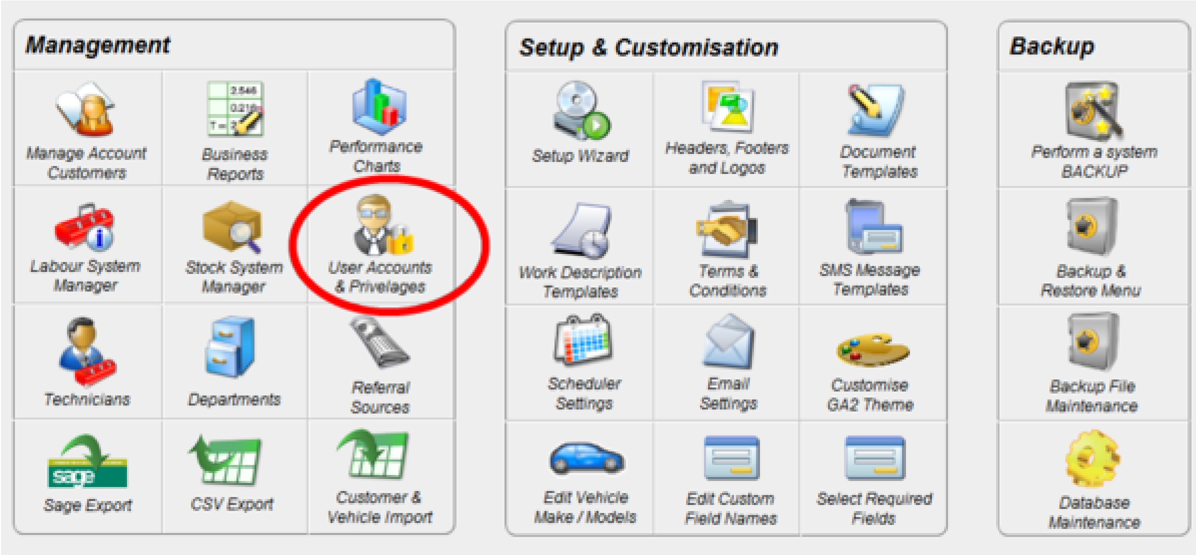
You can define your own user accounts and privileges for use by your staff, this allows you to restrict certain operations and areas of GA2

You can also set a default starting page, depending on your personal preferences

To do this, you need to go to

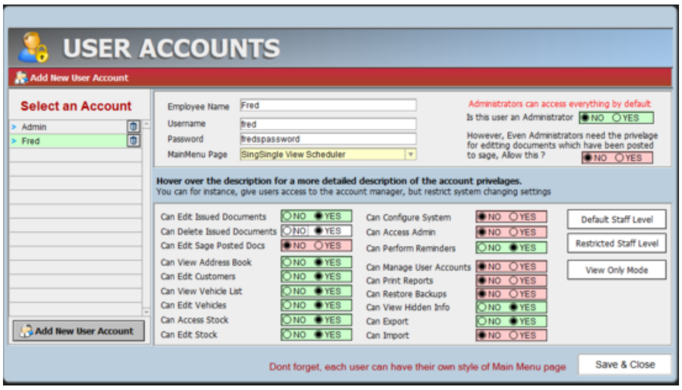
1. Admin

2. User Accounts & Privelages



For example you can set Fred up with a startup page of the scheduler, and restrict access to areas such as the admin area.
When Fred logs into GA2 he will be immediately taken to the schedule page, any time he clicks main menu, this page will show.

Anne could be set up with a start page for the Admin area, you could restrict Anne from creating or deleting documents but allow full access to admin
When Anne logs in, she would be immediately taken to the admin page.



Above illustrates that Fred is not an administrator and also has some restrictions in place.

2.2.3 Departments

If you intend on categorising invoices against particular departments, for instance you could categorise by :

- Mechanical
- Recovery
- Internal

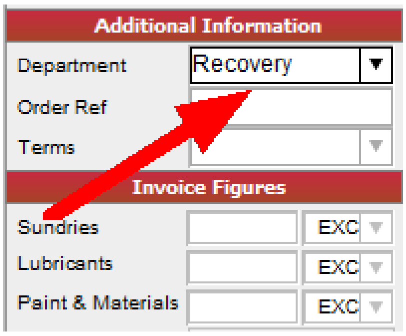
You will first need to set the department up, for this you need to go to

1. Admin
2. Departments

Next

1. Click on New Department
2. Enter a unique ID for this department
3. Enter the department name

You will then be able to select these from a drop down list during document creation (on the right hand side of the document screen)



TIP	Using department gives you the ability to generate extra charts and reports based on this information

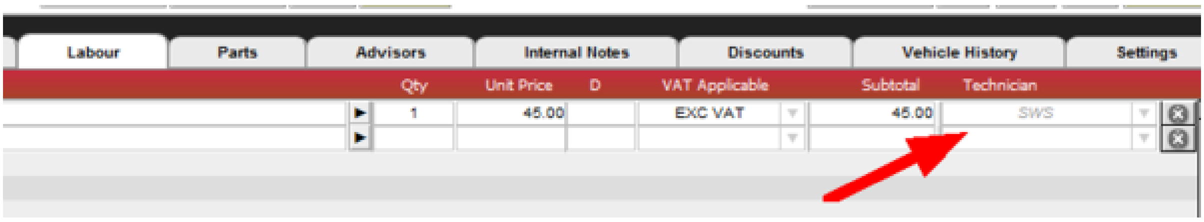
2.2.4 Technicians

If you intend on recording technicians against labour items on your documents for reporting purposes, you will need to set them up first.

For this you will need to go to

1. Admin
2. Technicians
3. Click on New Technician
4. Enter a technician id, usually the technicians initials
5. Enter the technicians name

You will then be able to select these from a drop down list during document creation, at the end of each labour line



	Using technicians gives you the ability to generate extra charts and reports based on the technician

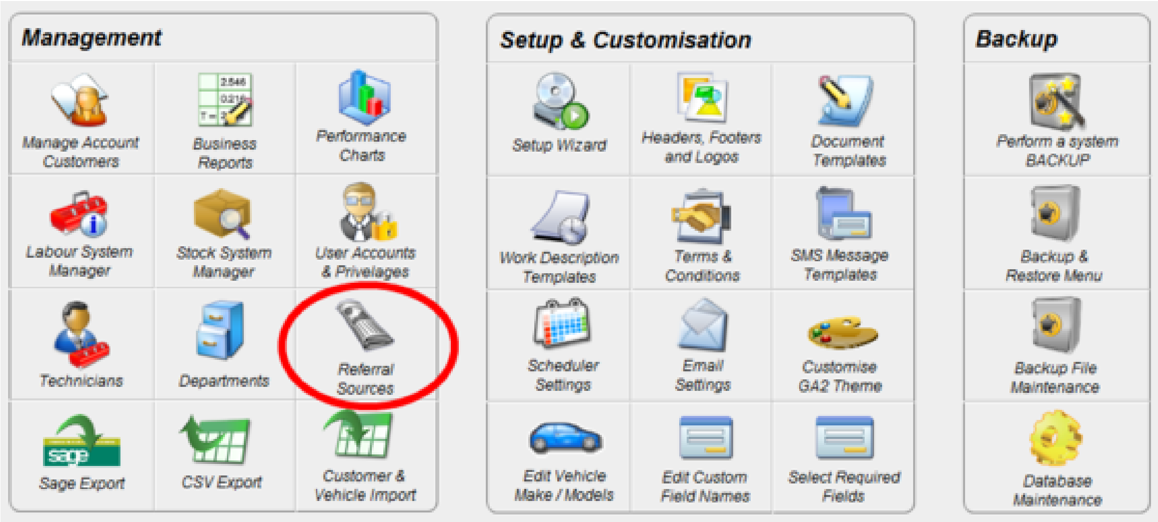
2.2.5 Referrals

If you intend on keeping track of how your customers came to find you, or where referred to you such as

- Local Paper
- Internet
- Yellow Pages

You will first need to set the sources up, for this you need to go to

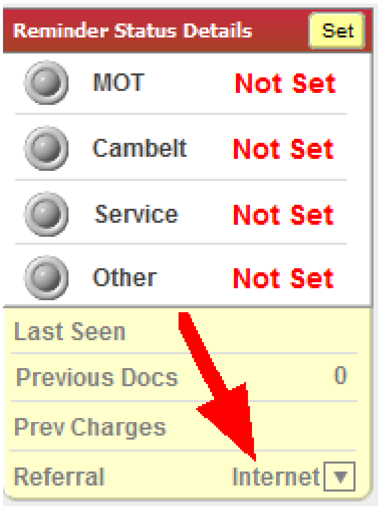
1. Admin
2. Referral Sources



Next

1.Click on New Referral
2.Enter a unique ID for this referral
3.Enter the actual name

You will then be able to select these from a drop down list during document creation in the section shown below



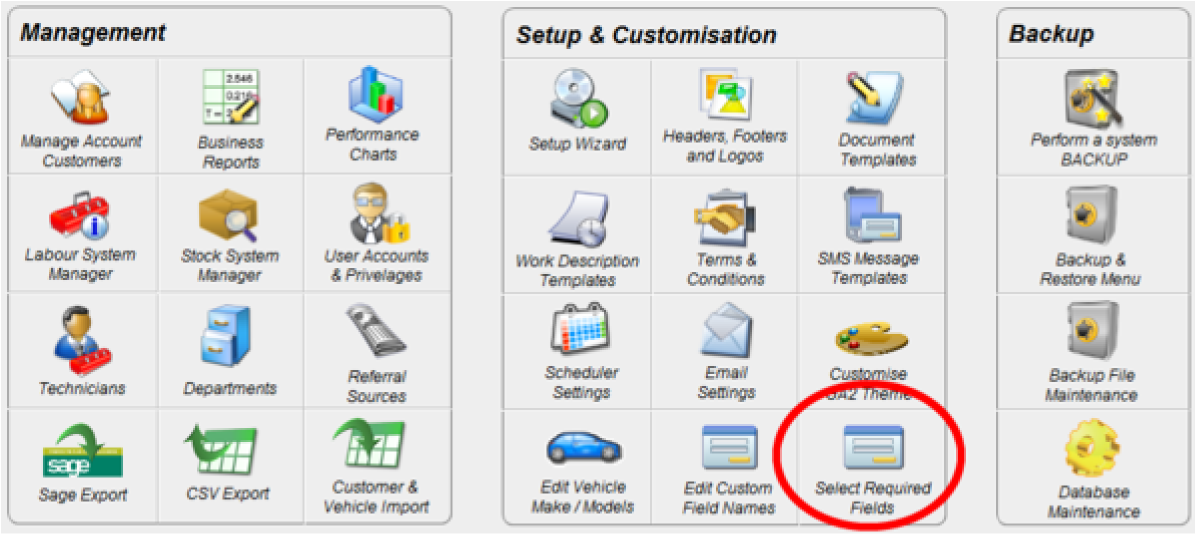
	Using referrals gives you the ability to generate extra charts and reports based on the these

2.2.6 Required Fields

Garage Assistant allows you to force a number of fields to be required before an invoice is allowed to be issued
This helps to keep your database consistent and ensure you don't miss any important details.

You can do this by going to

1. Admin
2. Select Required Fields



At present the fields available are :

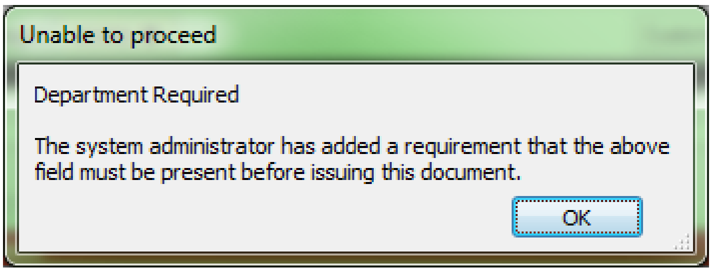
- Registration
- Make & Model
- Derivative
- Chassis No
- Engine CC
- Engine Code
- Mileage
- Date of Reg

- Full Name
- House No
- Road
- Locality
- Town
- Post Code
- Telephone
- Mobile

- Department
- Order Ref
- Terms

- At least 1 technician

When you try to issue an invoice where a section of information is missing, you will be prompted to enter the information by a dialog box as shown below



TIP	None of the settings on this screen will apply if the user has administrative privileges set to yes.

2.2.7 Labour Manager

The labour manager allows you to populate the database with categorised jobs which you frequently carry out to aid in document creation.

For example you could set up a category for servicing and enter 3 types of service jobs. Each job can contain a number of labour, parts and advisory items, along with any relevant fixed price costs

Before you can use this system you first need to add categories, followed by the jobs themselves, this can be done in the admin area.

1. Admin
2. Labour System Manager

When adding a job, you can include as much or as little information as required, for instance you could enter a labour description but leave the prices blank.

You can select from your pre-defined jobs on a document, via the labour tab followed by clicking Select next to an available line.

This will show a new window with all the categories you have defined along with a listing of your pre-defined jobs using the descriptions you provided

By Clicking the 'Add to' buttons the entire job, including all specified items will be entered onto the document in one click

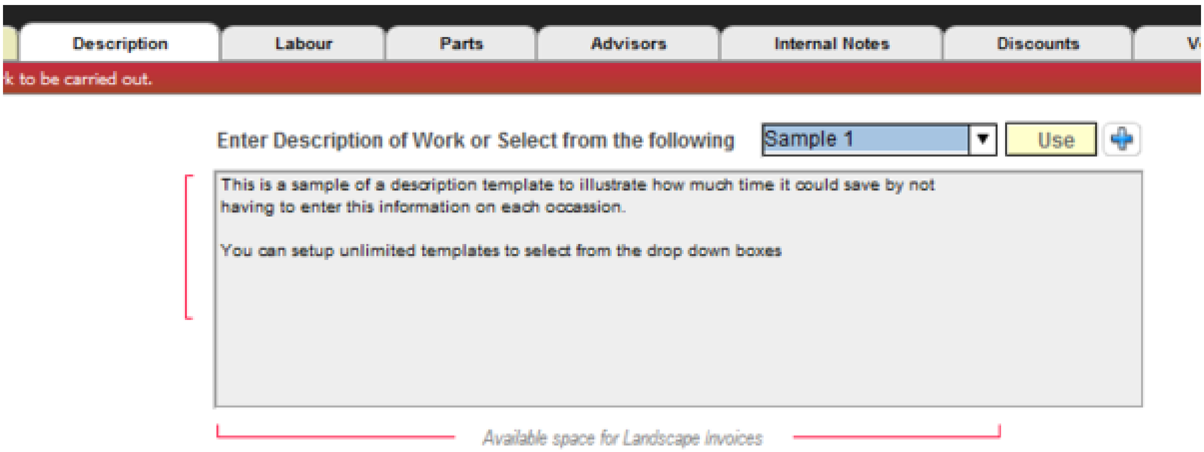
TIP	Use the labour manager to save yourself time typing repetitive jobs such as Service work or Fixed price jobs like Air conditioning recharges

2.2.8 Work Description Templates

Work description templates allow you to quickly select from your own templates to save time typing and keep consistency

You can add unlimited templates into GA2 via the administration area, these will then become available on each document for selection.

After creating the required templates, you can select them via a drop down box and insert into the description field as shown below



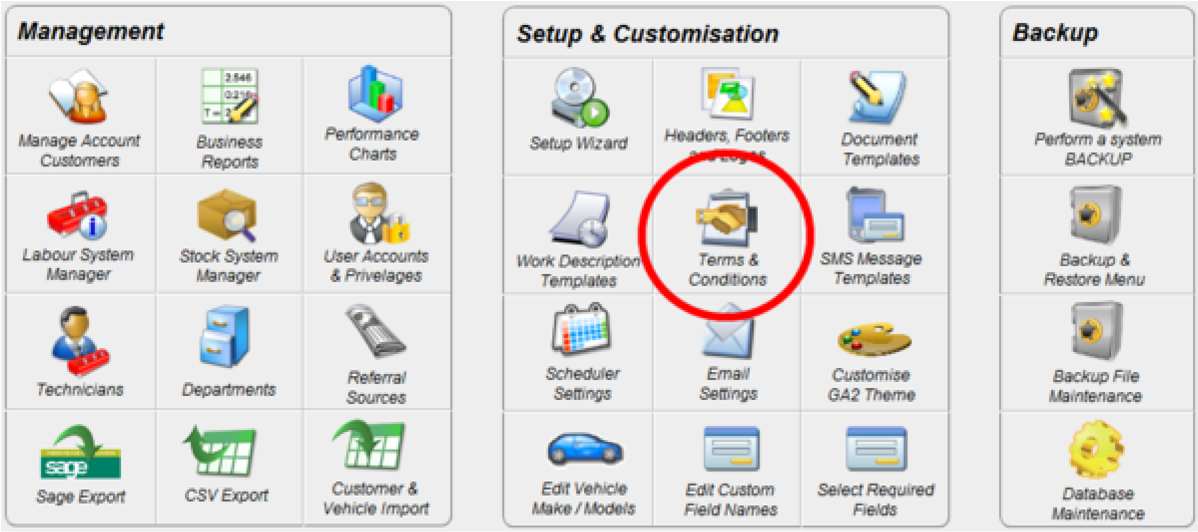
TIP	You can use multiple template text in the description area by selecting the template and clicking Use multiple times

2.2.9 Terms & Condition Templates

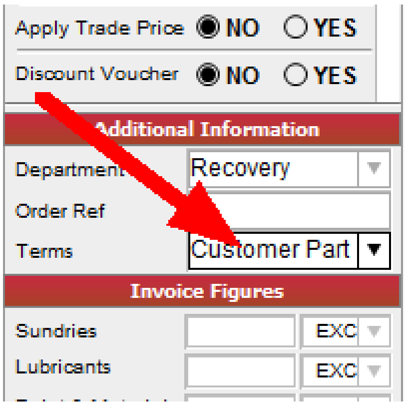
Some invoices may require you to add special terms and conditions such as changing a vehicles engine with one supplied by the customer.

In such cases it would be a good idea to set up a selection of pre-defined terms and conditions by going to

1. Admin
2. Terms and Conditions



Using the screenshot as an example, you could then add terms for 'Customer Parts and in the text stating that you do not offer warranty on any problems caused by using the customers supplied engine (for example)



The terms and conditions are selectable both on the document screen and also when adding payment, just incase..

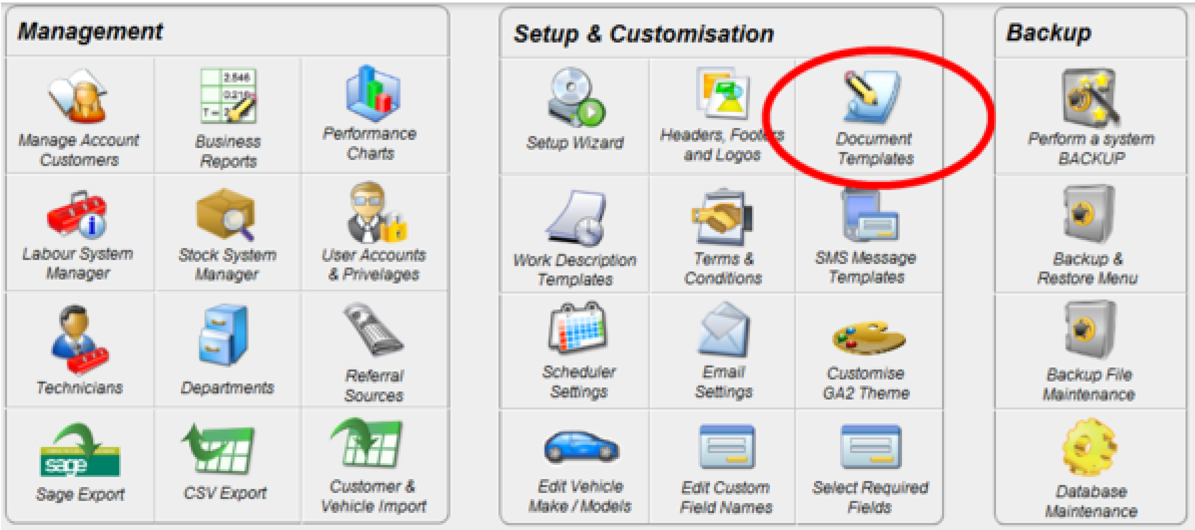
Depending on the document style you have chosen, the terms and conditions will print at the bottom of the document and retain any formatting you used when creating the template, such as colour and font styles

TIP	You can use the terms and conditions for promotional information on customers documents

2.2.10 Mailshot Letter Templates

In Garage Assistant you can edit and create new letters for use with mail shots, and emails, you can also add font styles & colours to make your letters stand our, however using such features may take a while to get used to as they do not follow the conventional method as most word processors.

From the Administration Area choose Document Creator



You will notice that most of the letter is straight forward however some parts contain text such as <<Name>> or <<Reg>> this is called a Merge Field and allows Garage Assistant to auto fill the letter with the corresponding customers details.

To insert these you can either manually type them to match exactly those shown, or click the location where you would like it to be inserted, then click the corresponding button on the right hand side of the letter edit window.

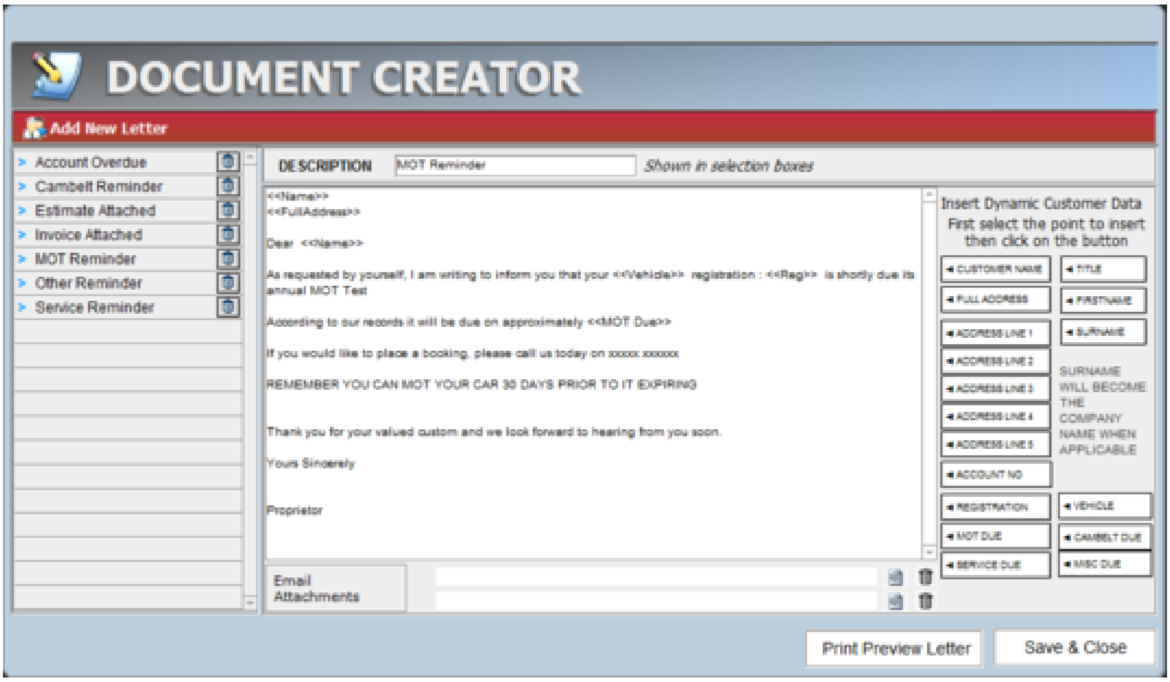
If you wish to change the Font Size, Colour or Style you must FIRST select the text you wish to apply this style to followed by clicking appropriate toolbar options at the top of the screen.

When creating your letter you are able to place the following Merge fields anywhere that you find suitable which allows a more personal letter.

<<Name>>	Full customers Name
<<Title>>	Customers Title (Mr, Miss, Mrs etc)
<<Firstname>>	Customers First Name
<<Surname>>	Customers Surname
<<Road>>	Road
<<Area>>	Area
<<Town>>	Town
<<County>>	County
<<post code>>	Postal / Zip code
<<FullAddress>>	Full address with any spaces removed for missing entries
<<MOT Due>>	MOT Due Date (regardless of renaming the field label)
<<Service Due>>	Service Due Date (regardless of renaming the field label)
<<Cambelt Due>>	Cambelt Due Date (regardless of renaming the field label)
<<Misc Due>>	Misc Due Date (regardless of renaming the field label)
<<Vehicle>>	Vehicle Make

<<Reg>>	Vehicle Registration

Email attachments can also be added when using the custom mailshot facilities.

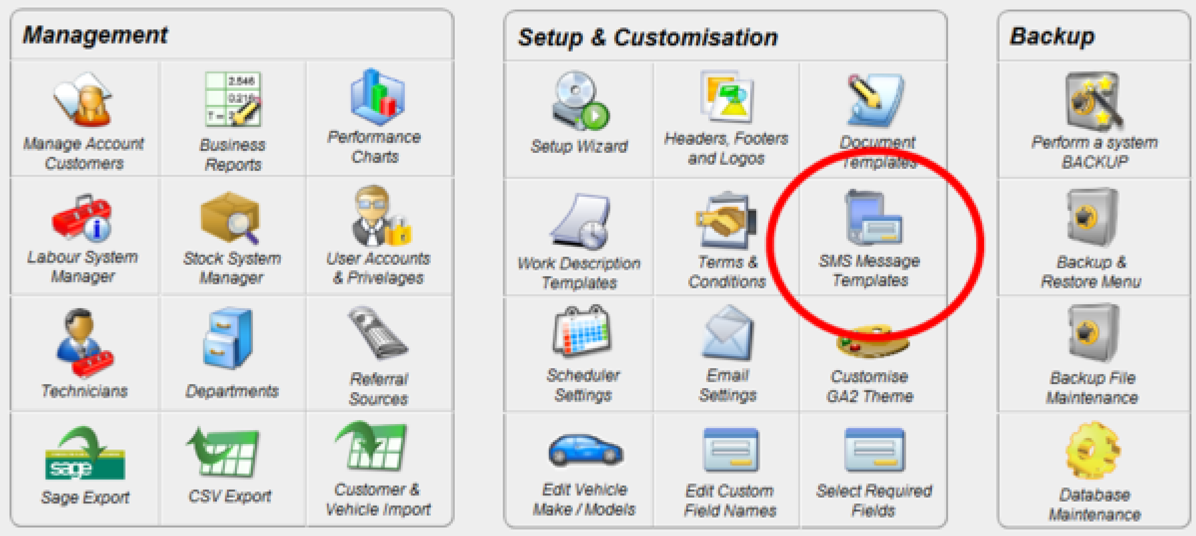


	You can add as many templates as you require, however those pre-set for MOT Reminder, Service Reminder, Cambelt Reminder and Other Reminder cannot be renamed, only edited. Letter templates can be used during sending an email to a customer, emailing an invoice to a customer, or when using the bulk mailshot facility

2.2.11 SMS Message Templates

If you wish to send your customers SMS messages for reminders, or just to let them know their vehicle is ready for collection, you can edit the message which is sent to suit your needs by going to

1. Admin
2. SMS Message Templates



When editing the templates, you are able to insert what's known as Merge Fields, these allow you to dynamically insert customer specific information directly without having to manual type each time you want to send an SMS Text message

Available merge fields for Quick SMS Messages

{reg}	Vehicle Registration
{name}	Customers Full name
{car}	Vehicle Make and Model

Available merge fields form SMS Reminder Mailshots

<<MOT Due>>	MOT Due Date
<<Service Due>>	Service Due Date
<<Cambelt Due>>	Cambelt Due Date
<<Misc Due>>	Misc Due Date
<<Vehicle>>	Vehicle Make and Model
<<reg>>	Vehicle Registration

TIP	SMS Messages have a character limit in place to ensure only 1 SMS credit is used per message. After editing the message, if the text is too long you will notice it gets cut off the end automatically.

2.2.12 Scheduler Options

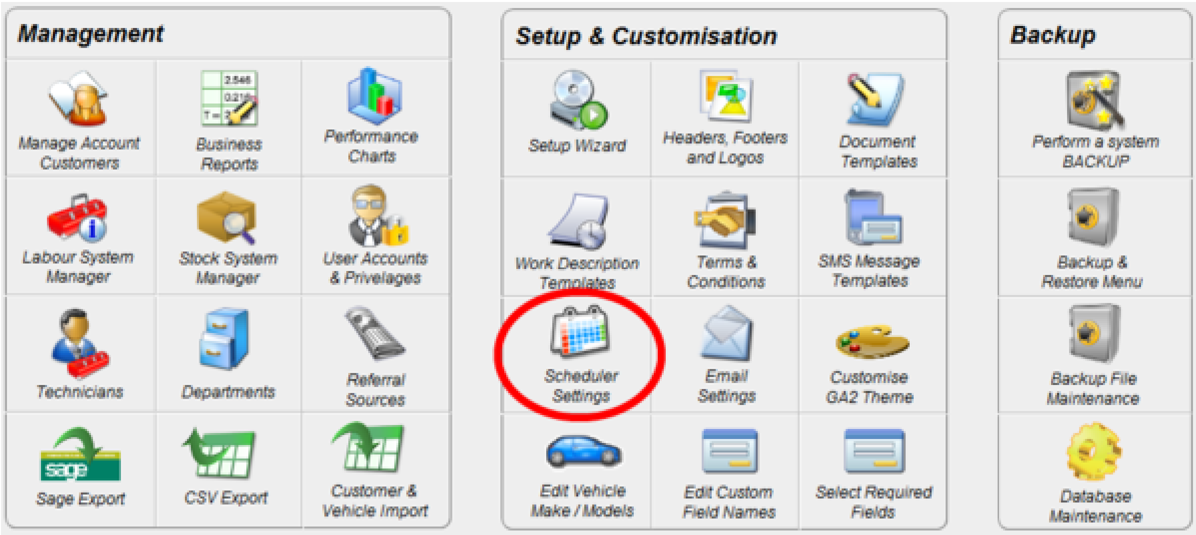
You can alter various elements of the scheduler such as adding or renaming

1. Appointment Bays
2. Appointment Types
3. Available Colours (for appointment types)

There are a number of pre-defined configurations set up for ease of use.

These options are available by going to

1. Admin
2. Scheduler Settings



> You can also set your lunch times for visual representation on the schedule, this is available at the moment from the top right of the scheduler screen and uses 24 hour time format. When set the lunch time period will be highlighted in a pastel red colour

2.2.13 Email Server Settings

Using the inbuilt email system in GA2 does not require any setting up, other than perhaps configuring your firewall to allow Garage Assistant through.
Apart from entering your own email address, by default the system is set to send all messages through our own email server for convenience

You can however setup the email server using your own settings which you should be able to get from your email provider

> If your internet service provider is Orange, Sky, Talk Talk or if you continuously receive time out errors, try setting the following :
> SMTP Server Port : 587 instead of the default 25

2.2.14 Makes and Models Database

Depending on your needs, GA2 allows you to edit the vehicle makes & model database and also allows you to import using 3 pre-set options

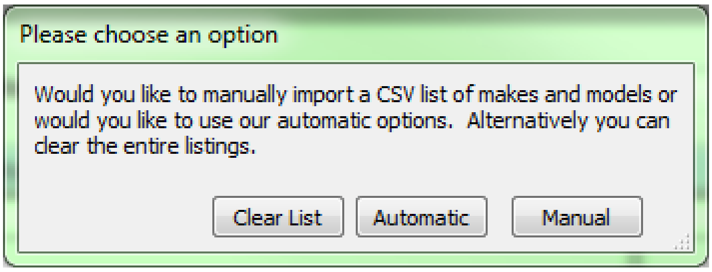
By going into :

1. Admin
2. Edit Vehicle Makes and Models

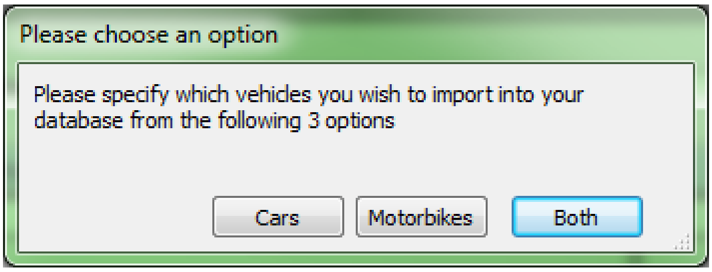
You can either add or delete manufacturers, add models or run an import of data

If you click import data you are given the option to :

1. Clear List - which will remove all pre-defined data in GA2
2. Automatic which will then follow with two more options
3. Manual - which allows you to import from your own custom list of vehicle makes and models.



If you chose automatic above, you are then asked to choose either Cars, Motorbikes or Both. GA2 will then proceed to import from our pre-set list supplied



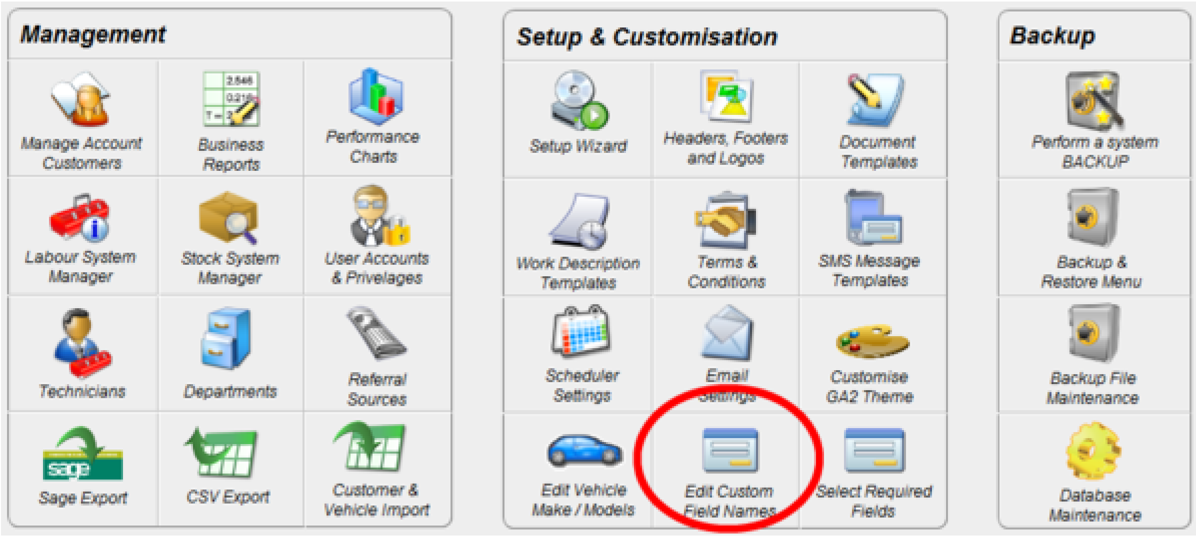
TIP	By default GA2 is provided with both Car and Motorcycle makes and models, using these options you can tidy up the drop down lists to include only what you require

2.2.15 Custom Field Names

If you find that some fields are not useful, or would like to record different information than is initially set up you can change a selection of field names to more suitable names for your own use.

Simply go into Administration and select “Edit Custom Field Names” from there you can simply re-enter your desired field names such as changing Mileage to Hours Used, the original label of the field will be show to the left for future reference.

Here you can also change the names for each reminder in the system for instance
Other Reminder could be changed to MOT & Service and then be used to remind customers of a combined MOT Service date



This allows you to change a selection of field names to suite your business, such as

- Registration
- Make & Model
- Chassis Number
- Eng No
- Engine Size
- Engine Model
- Mileage
- Postal Code
- Key Code
- Paint Code
- Radio Code
- Sundries
- Lubricants
- Paint & Materials
- VAT
- MOT

2.2.16 Sage Export Options

If you are going to be using the sage exporting facilities in GA2 you will first need to set up some of the options to match those set in sage, such as Nominal Codes and how you want the data to be exported.

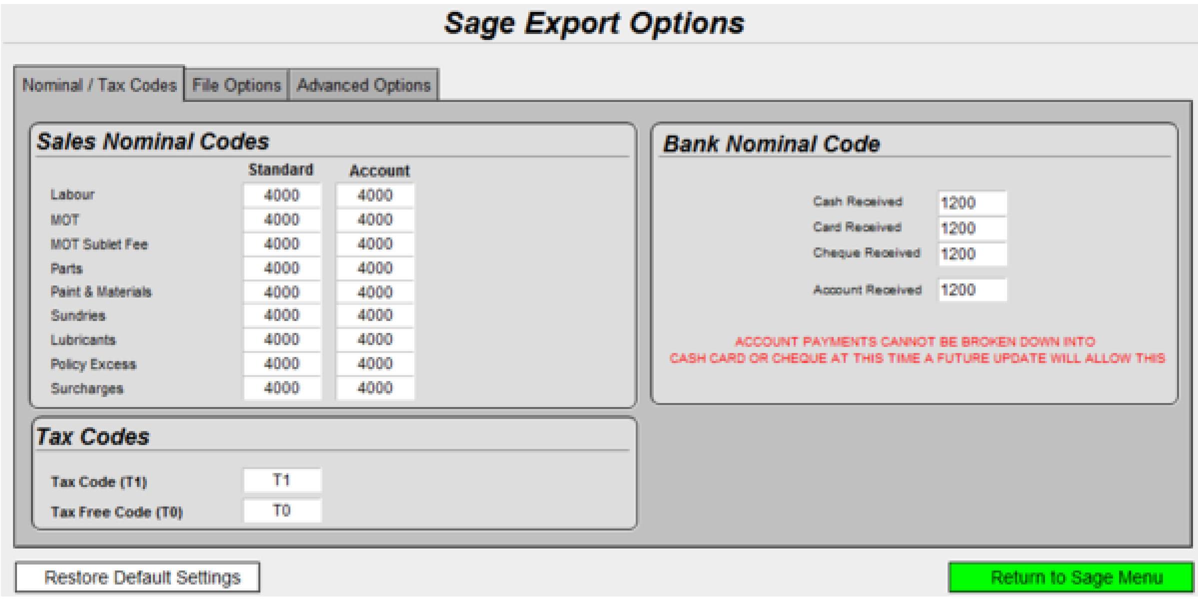
This can be done by going to

1. Admin
2. Sage Export
3. Configure Sage Export Options

On the Sage export options page there is a selection of tabs for Nominal / Tax codes, File options and Advanced Options

You will first need to set the nominal codes to match those you have in sage, or create nominal codes in sage to suite the categories available

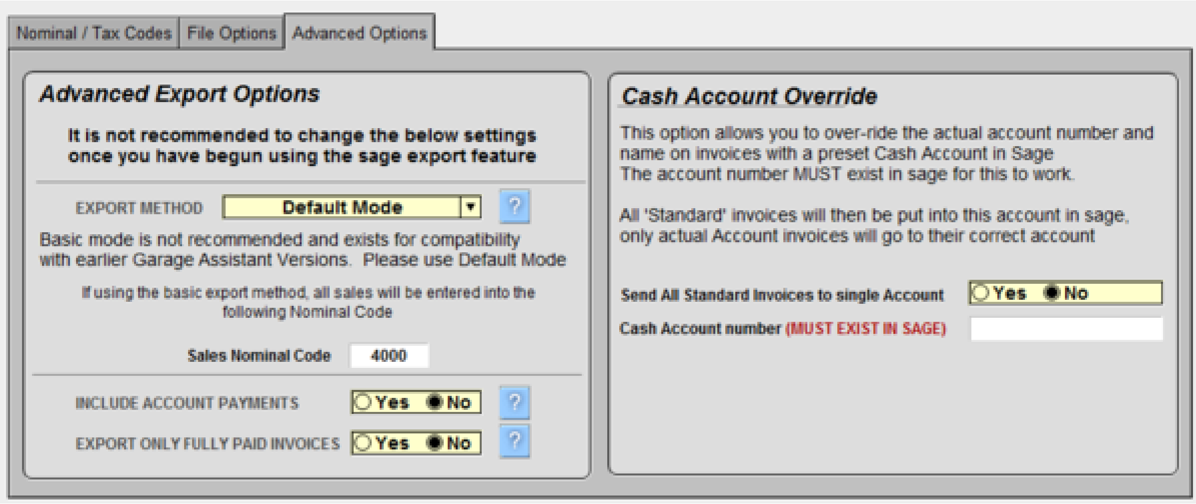
Next specify the Tax Codes you use or vat-able items and non vat-able items



Failure to match the nominal codes in GA2 with those you have in sage will cause the import to fail, giving errors

Next you will can if required change where GA2 will export the files to, and their names however changing is not required nor recommended.

Finally you can specify a number of advanced options as shown below..



It is highly recommended that you do not change any advanced options once you have begun exporting to Sage, since it may cause problems such as If you had GA2 set to not include account payments, then later told it to include them, you may get an export containing all past account payments which you may have already entered manually into sage.

2.2.17 System Backup Options

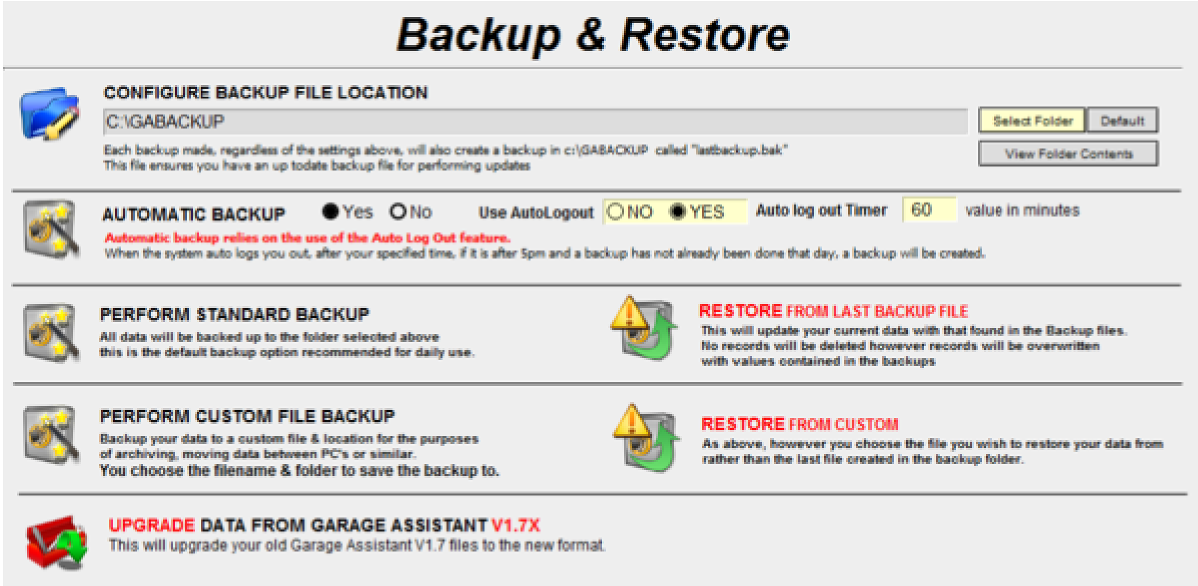
By default GA2 will perform backups to a folder on your local hard drive called GA_Backup

by going to

1. Admin
2. Backup & Restore Menu

You are able to specify a different backup folder such as a USB memory stick or other external media
Unfortunately you cannot backup automatically onto a CD-Rom

To enable you to backup to external media, it must be preset initially to select the correct folder you wish to store files to, by clicking the 'Select folder' button



You can also specify automatic backup options, these are based of in-activity of the system and take advantage of the auto log out system

For instance, If you do not use your system for 60 minutes, GA2 will log out.
If the time is past 5pm and you have not performed a backup for that day, an automatic backup will occur
If it is before 5pm an automatic backup will not be triggered

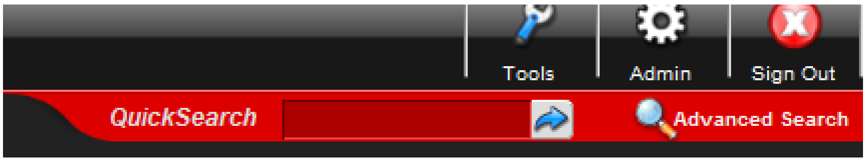
Other options allow you to perform one time backups to your own custom location or restore from those locations

TIP	**If you perform a backup whilst GA2 is set to use external media such as a USB memory stick, if the stick is not present GA2 will prompt you to insert it and retry, this will also happen if the folder you select is no longer available on your system**

3 Using Garage Assistant 2

3.1 Using QuickSearch and Advanced

Garage Assistant contains a single field (google style) search allowing you to find any documents quickly with little effort.

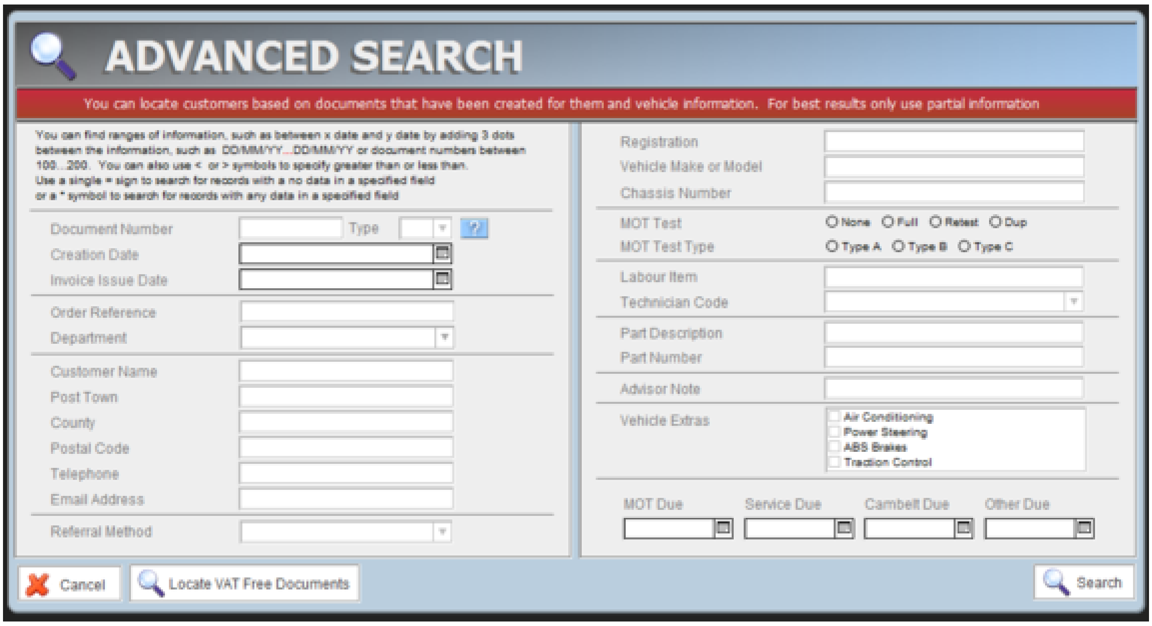


Search simply by entering any of the following information into the box :

- Invoice number
- Estimate Reference
- Creation Date
- Invoice Issue Date
- Account Reference
- Customer Name
- Registration
- Make / Model
- Post Code
- Telephone Number
- Mobile Number

If more than 1 result is found you will be shown a list view of all matching records, however if only one record is found you will be taken directly to that record

Along side the quick search there is an advanced search option, giving you more options and control over the results, by clicking advanced search you will be taken to the following screen



In the advanced search window, you can enter as much or as little information as required, along with some special techniques which are briefly explained on the screen.

A few search examples :

You could search for all invoices issued between 01/01/2009 and 01/04/2009 by entering 01/01/2009 ... 01/04/2009 in to the Invoice Issue Date field

You could search for all documents created for customers with a Ford who live in Sussex, by entering Ford as the Vehicle Make and Sussex as the County

You could search for all records which contain an mot issued between 01/04/2009 and 01/04/2009 and no mot reminder set by entering

Invoice Issue Date : 01/04/2009 ... 01/04/2009
MOT Test : Full
MOT Due : =

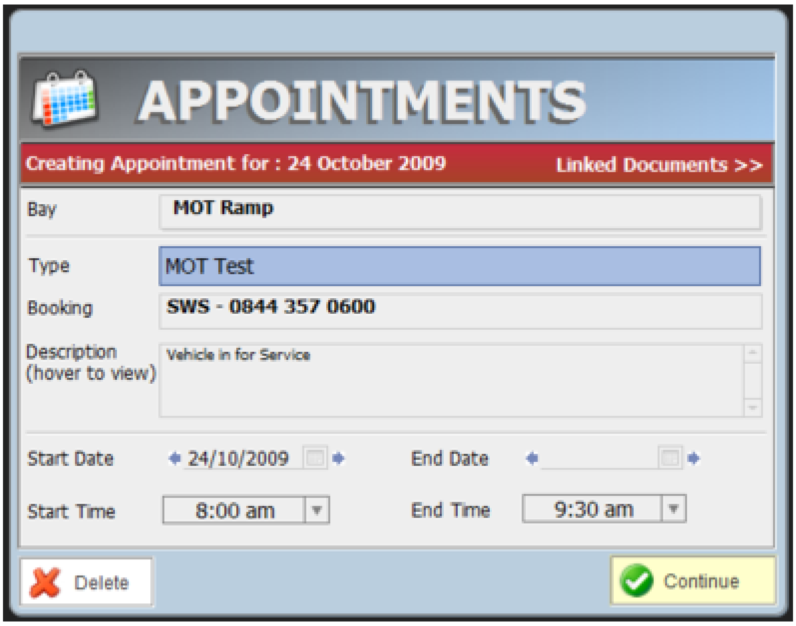
You can use the asterisk symbol for unknown characters such as *live if you where not sure the customers name was Klive or Clive
You can use == to force the search to exactly match the data entered
You can use = to search for an empty field
You can use < or > for less than or greater than
You can use ... to specify a range of numbers
You can use ! to search for duplicate data

3.2 Creating Appointments

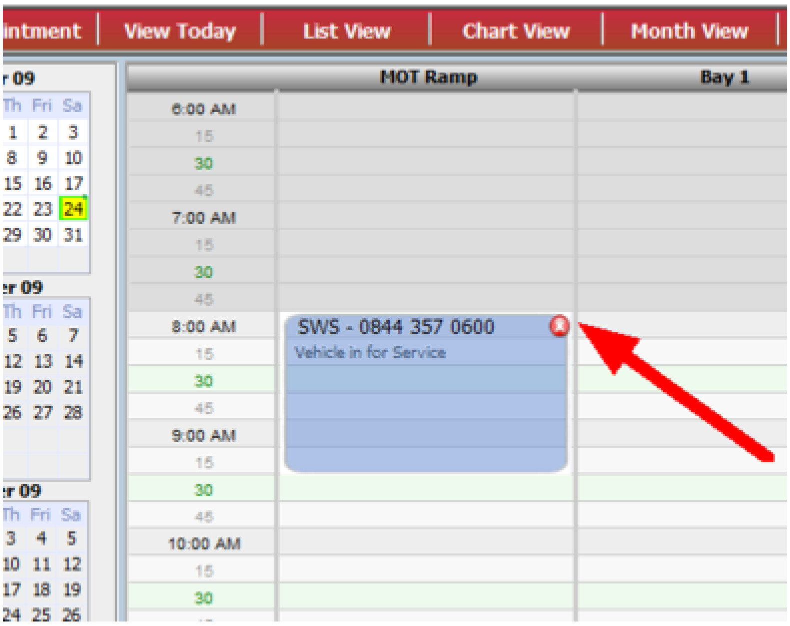
GA2 allows you to schedule appointments throughout a series of work bays with colour coded job types for ease of viewing.
Simply click on the desired time and you will be prompted to either create the appointment or will be taken edit the appointment if it already exists.

If an appointment exists, you can then move it to another bay or change any details.
When creating a new appointment you can select the type (which is colour coded) enter the booking information, such as registrations and a description.

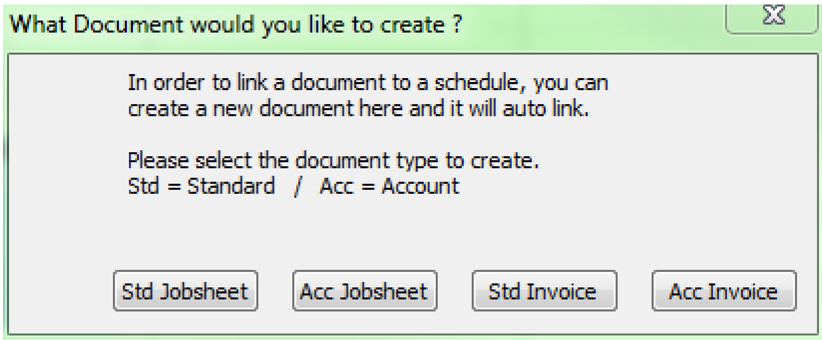
Finally enter the start time and end time, the end date is only required if the appointment will span a number of days, otherwise you can leave this blank.



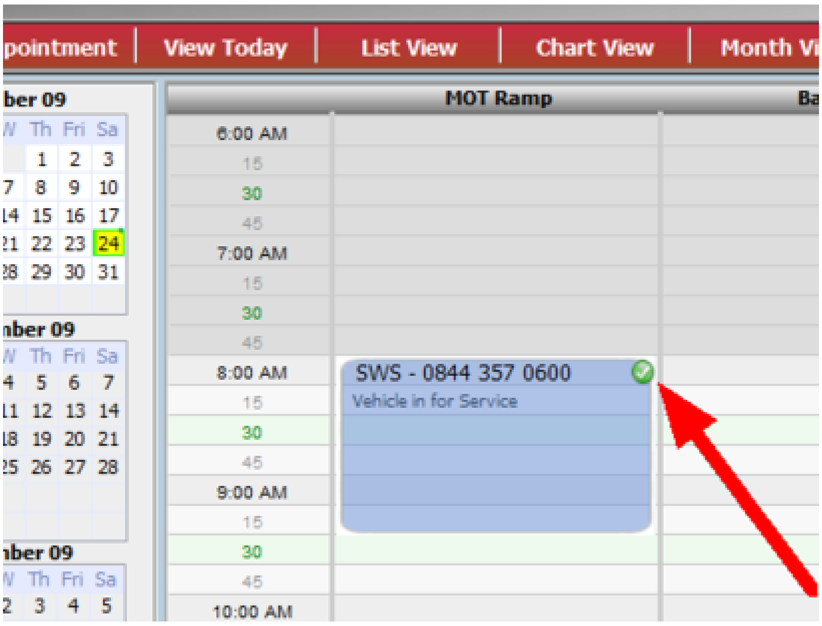
Once you have added the appointment, you can later create a document directly from the appointment screen for this customer by clicking on the red X to the top corner of the appointment



This will then ask what type of document you want to create from this appointment.



Once you make your selection, a new document will be created and you will be taken to edit the details on that document
The document will also be automatically linked back to the scheduler listing so you can quickly find the corresponding document when required



You will notice the red cross will change to a green tick to indicate a document link exists.

TIP	At the moment, no details are transferred from appointments to a new document such as customer name, they are only linked together for quick finding.

3.3 Creating Documents

3.3.1 Adding a new document

In GA2 you have the ability to create Estimates, Job sheets or Invoices and later convert from these types for instance, converting an estimate to an invoice.

There are two different types of each document available, these are

- Standard - designed for pay before collection customers
- Account - designed for account holders who pay by statement

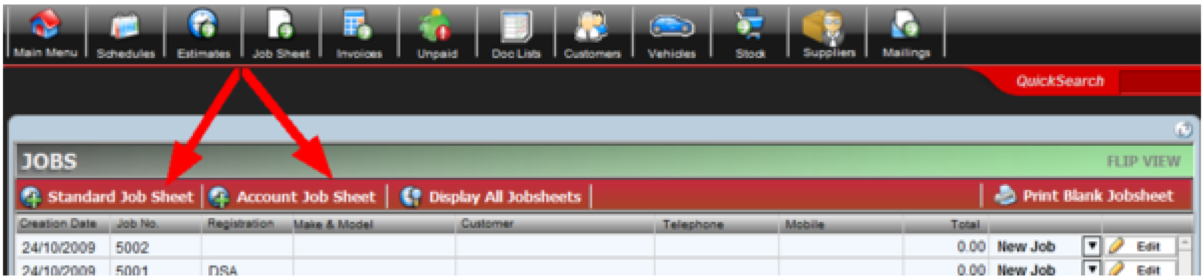
The idea to keep these sperate offers additional indications such as

- You can easily determine if the invoice / customer is account or cash since they are colour coded
- You are offered different options when it comes to issuing the invoice
- The selection of customers is narrowed by the type of customer
- Account based invoices can be managed in a separate area of GA2

By clicking on either Estimate, Job sheets, Invoices or Main Menu (depending on the preferences you have set)

You will see the corresponding 'in progress list' this list will be populated with any documents currently being worked on and show them until issued or in the case of estimates & job sheets, until they are converted to an invoice.

At the top of each section is a menu bar as shown below



You will notice a separate option for Standard Job sheet | Account Job sheet

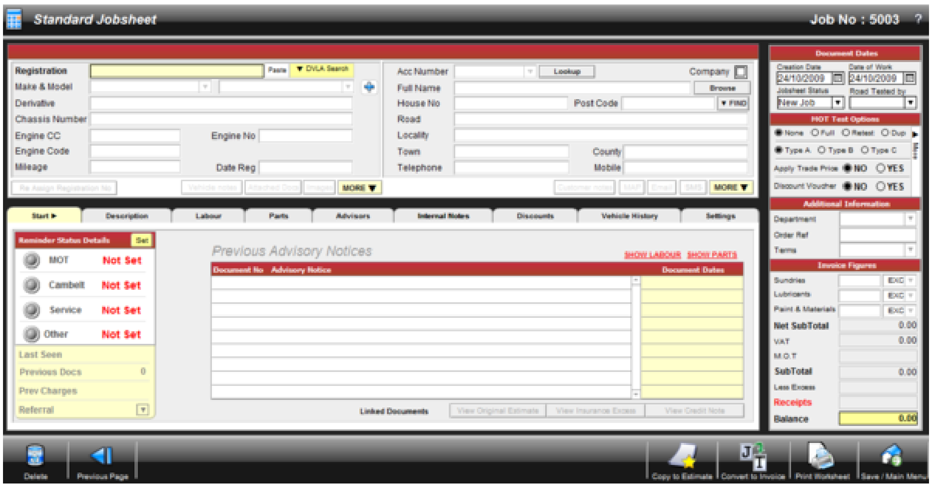
By clicking the relevant option, a new document will be created.

TIP	**If you are creating your first document of that type, you will be prompted to enter a starting document number, which will then automatically increment in future use.**

3.3.2 Customers / Vehicles Input

Whilst each document type has its own purpose, for consistency the general layout applies to all types with small differences which will be outlined below.

After you have created a document, you will be presented with the document edit window, for this example we will be creating a job sheet.
The document window as shown below allows you to enter all of the required details in one place



There are a number of ways to add customer and vehicle information, you can either enter the registration first, if the vehicle has been to you previously the vehicle and customers details will automatically be filled out, along with the display of the vehicle previous history and due dates

Alternatively, you can lookup the customers account number or browse the customer address book to select the correct customer, this time however if they have previously been to you, you will be presented with an option to choose the customers vehicle or add a new vehicle.

If however the customer is new to you, you can manually enter the details directly into the fields and they will be saved in the database for future use.

If you are creating an account document, you must first add the account customer to your database by setting them up an account
This can be done via the customers screen on the main menu, or you can click browse from the document followed by add account customer.

As you start populating data into GA2 creating documents will become quicker and also provide more information for reference

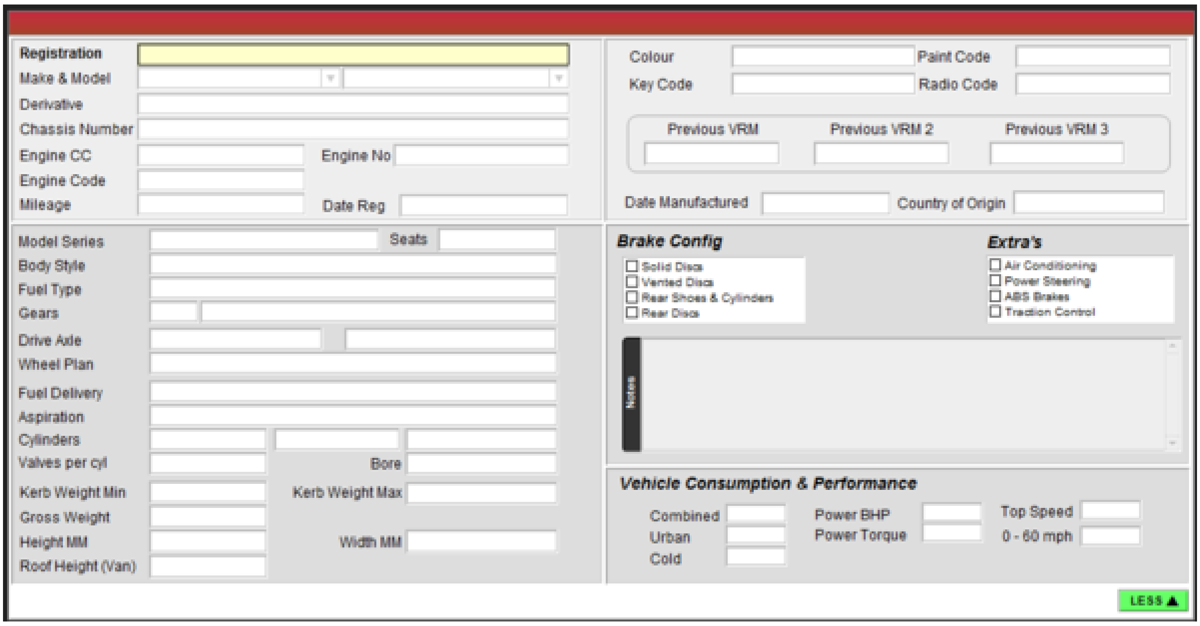
We also offer the ability to perform DVLA registration lookups which uses a credit based system, whereby you can pre-purchase lookup credits.
Simply clicking on the DVLA lookup box will fill in all the vehicle information, including addition information which is exposed by clicking the 'More' button.

The checkbox labelled Company shown on Standard documents will define how the customer is sorted in listings
For instance, if the name is ABC Ltd and the box is checked, it will sort by the first letter (or first name)
If the box is unchecked, it will sort by the last word (or surname) this helps prevent all Ltd companies showing under L and all Mr... showing under M

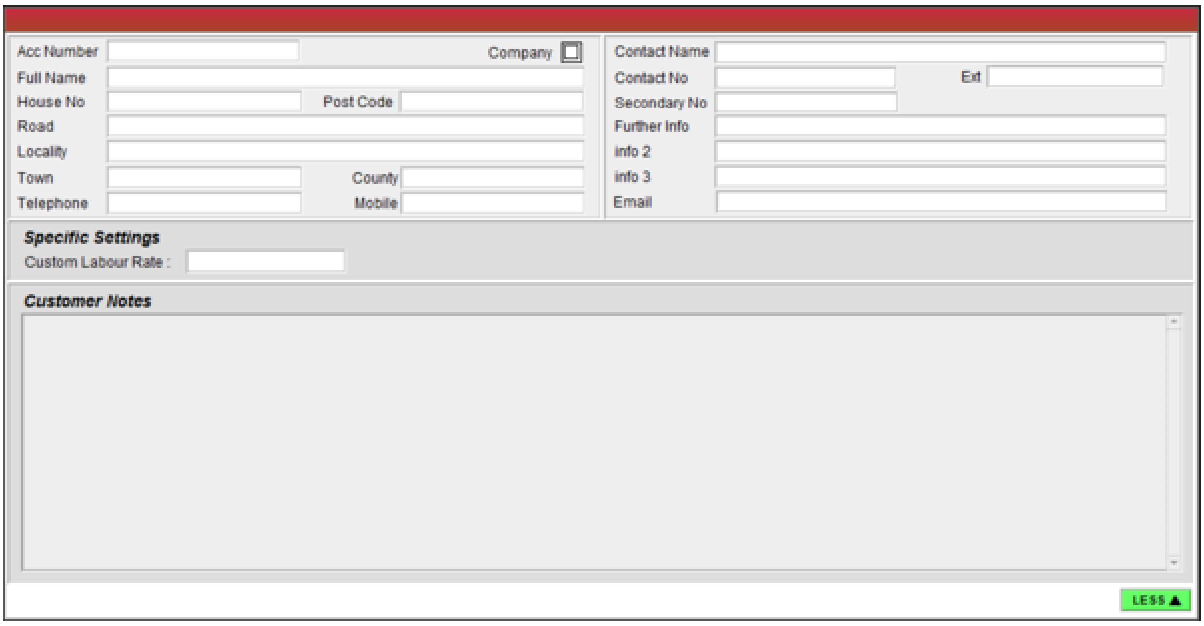
3.3.3 Additional Customer / Vehicle Info

Both the vehicle and customer sections can expand to reveal additional information you wish to record in the database, by clicking the 'more' buttons in yellow just underneath each section, they will expand to allow you to enter the additional data

Using the DVLA lookup will also automatically fill in most of the vehicle information shown in the vehicle section



Addition Vehicle Information



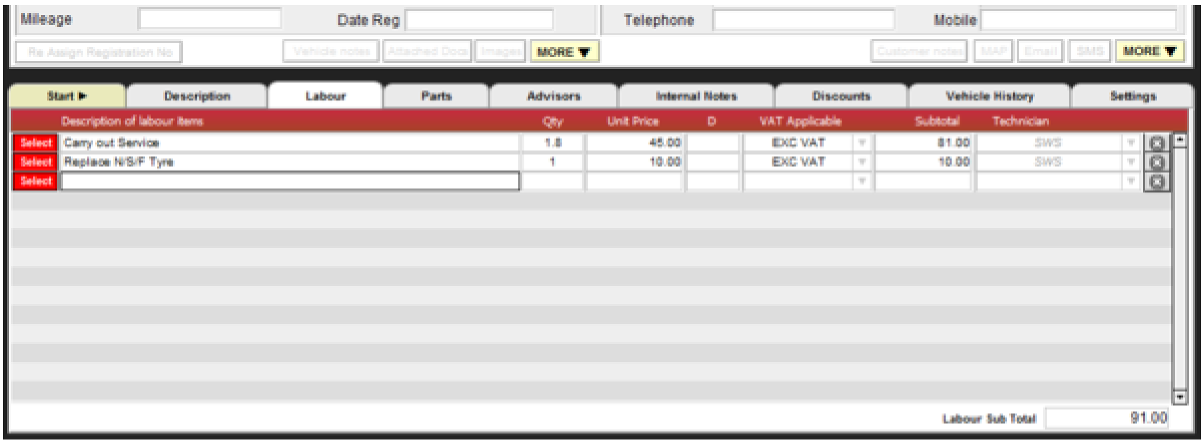
Additional Customer Information

TIP	Almost all of the additional vehicle information can be filled in if you take advantage of the DVLA VRM Lookup service

3.3.4 Adding Labour to Documents

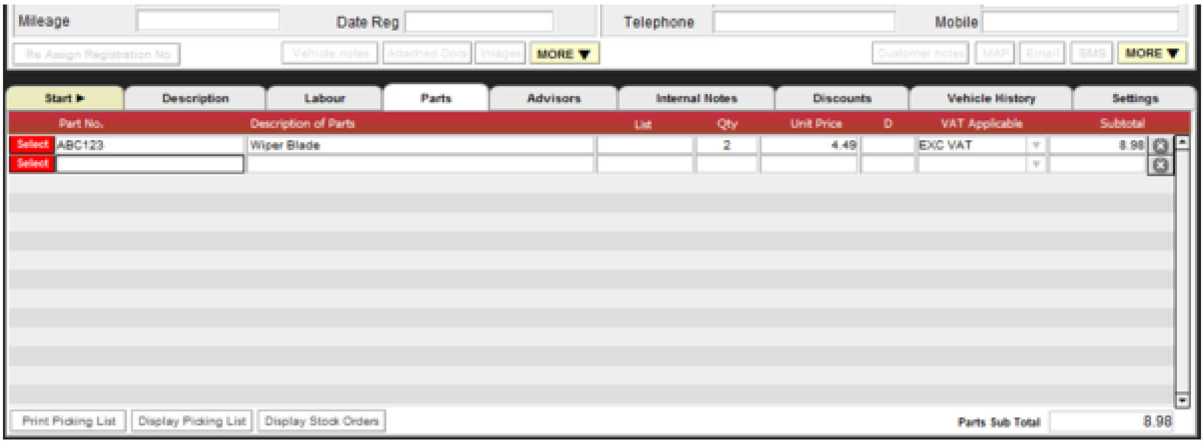
The labour section as shown below allows you to enter in the items manually, or by choosing select you can automatically populate the information from the Pre Defined Labour Manager section, as long as you have set some items up in the labour manager

- You can enter either Quantity or Hours into the Qty box
- The unit price can be automatically filled with your standard labour rate (if set up)
- The field labelled as D allows you to add a percentage Discount to that line
- VAT Applicable allows you to specify one of the available Vat options such as Exc Vat or VAT FREE
- and finally the technician field allows you to specify which technician carried out the work (if set up)

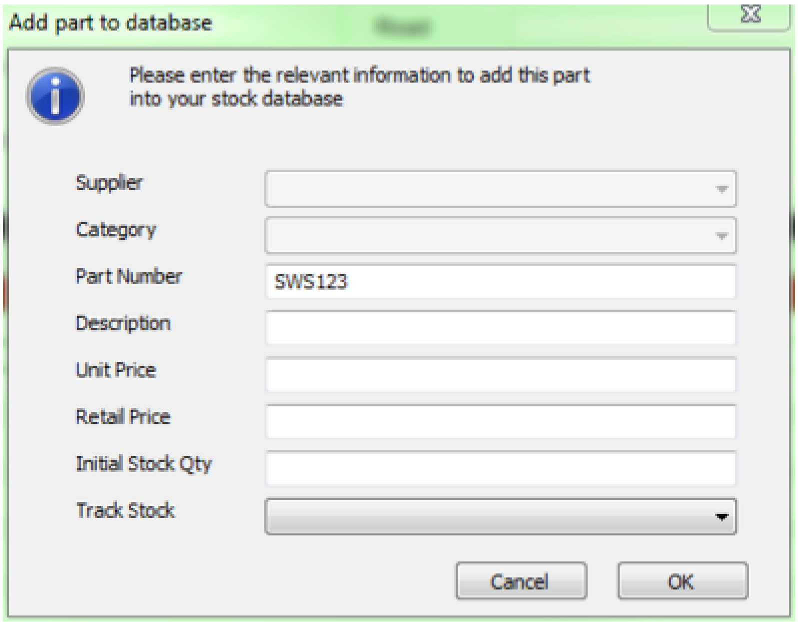


3.3.5 Adding Parts to Documents

The Parts section as shown below allows you to either enter parts in manually, or you can choose a part from the stock control system, there are a variety of options and interactions for parts which we will also briefly explain..



Depending on the options set in the setup wizard when adding a part number which does not exist in your stock database, you may see a window asking you to add that item to stock, this will only show if the part number does not exist and you have **'enable add to stock popup enabled'**



This lets you enter the information into the fields which will then be saved for future in your stock database

If you do not have this option enabled, you will be allowed to enter the description directly on the document, however no information will be transferred to your stock system for later use.

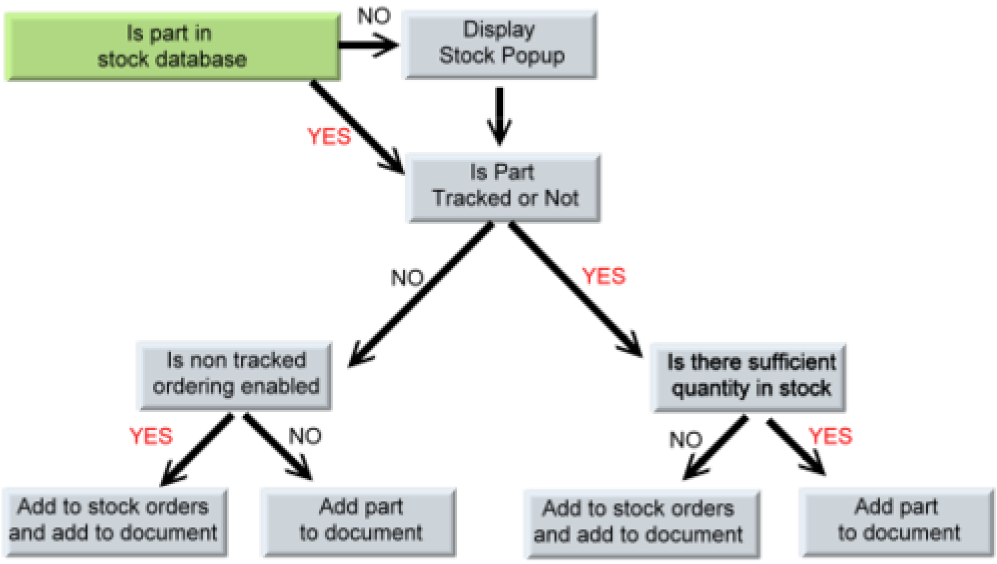
If however, the part number you are entering does exist in the stock database, you will see a list display which will filter down as you type, once the part number is entered or selected the remaining information for that item will automatically be looked up from the stock database.

Finally, you can also choose to click Select, this will take you to the stock system to search / browse the stock database and select the item you require.

Additional information on parts

As mentioned previously, there are a variety of options for controlling how parts are added to the document and how quantities are controlled, depending on how you set the stock options up will depend on what GA2 does with the stock line in terms of stock quantities and order processing.

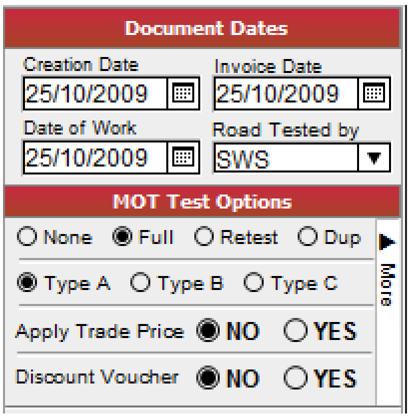
Here is a simplified example of what happens when adding a part number to the document



If you are using the Stock Ordering system, a record in the order system will be created to prompt you that certain items need ordering from a supplier, this provides an easy to use system enabling you to keep track of what requires ordering, what has been ordered and also to receive the order and update the stock database in a few simple clicks

3.3.6 Adding MOTs to Documents

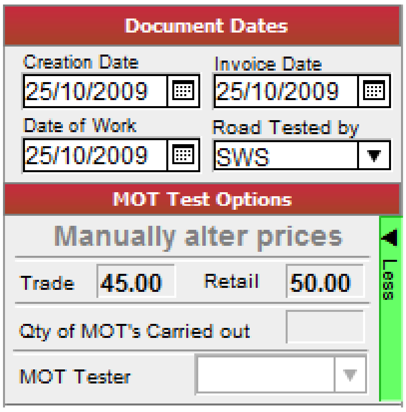
For ease of use GA2 contains a quick select MOT options area, you can pre-configure the MOT pricing in the setup wizard along with options for outsourced MOTS and up to 3 classes of vehicle.



This is shown to the top right of all the document screens, by clicking one of the options the price is filled in automatically on the document depending on the options set in the setup wizard

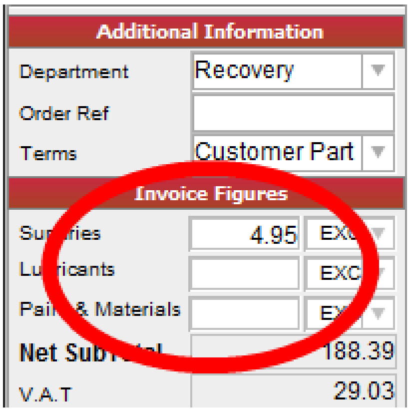
TIP	**If you create a new document and then change the prices in the setup wizard, the current document will still use the old pricing to prevent historic invoices being changed during a price change.**

You can also select the More option, to the right of the mot options, which give you addition information as shown below allowing you to over-ride the price on a document level or add a quantity of MOTs to one document and also store the MOT Tester against the document



3.3.7 Adding Fixed Price Items to Documents

Along side the usual labour and parts, you can also add up to 3 fixed price items to the invoice, these are directly above the invoice figures to the right.



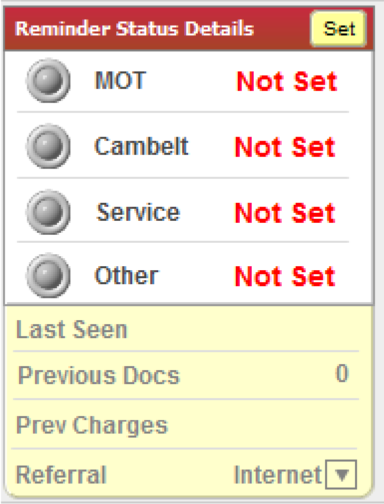
TIP	**You can rename the fixed price items to suit your requirements via the admin area.**

See related information for :

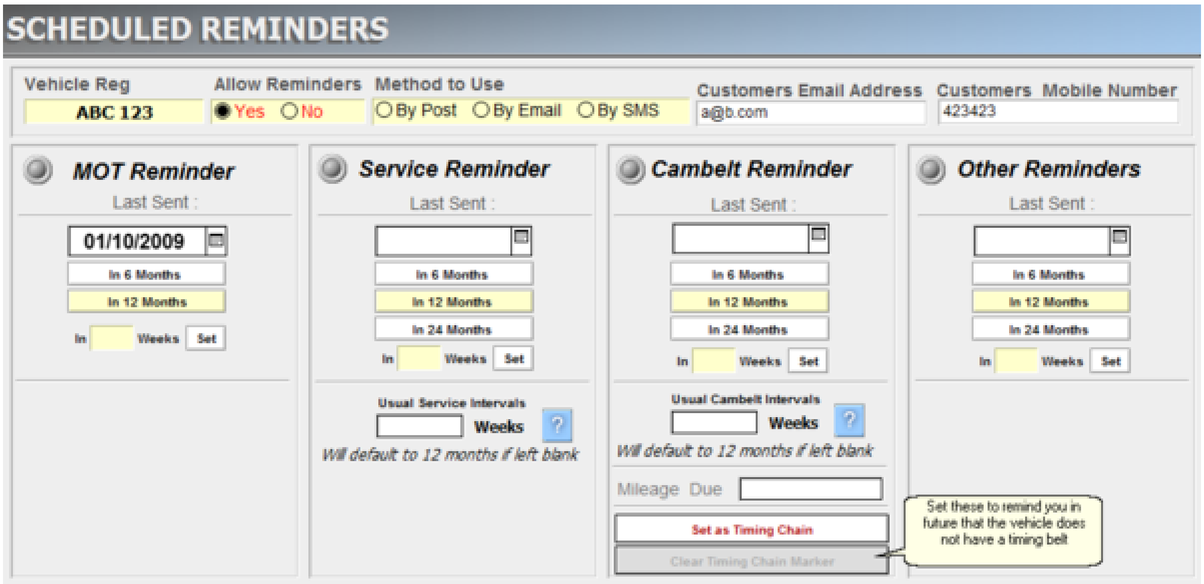
3.3.8 Setting Reminders

On the document screens you will also be able to view and set reminders as long as a vehicle registration is entered first.

When the registration is entered, if any due dates exist they will display the date due.



By clicking the set button you will be taken off to a screen to specify the reminder options, showing the vehicle registration and allowing you to specify the method you would like to use when performing a reminder mailshot.



You can either enter the date, or select the date from the popup calendar or choose from the quickset buttons labelled

In 6 Months, 12 Months or 24 Months

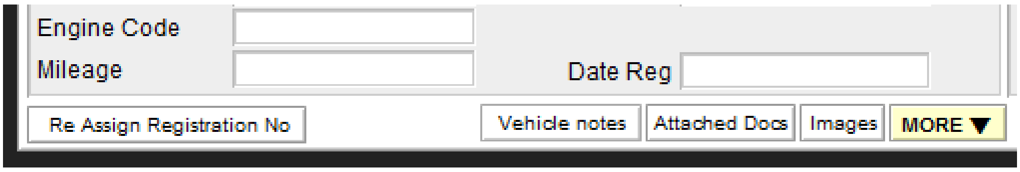
Alternatively, you can enter a number of weeks and click set, this will set the reminder date to x weeks from today.

Under the service and Cambelt options you can specify a usual service interval in weeks. This controls when the next reminder will be scheduled after performing a mailshot, MOT reminders default to reschedule in 12 months

3.3.9 Additional Buttons Available

On the document screens there are a variety of additional buttons and options available

Under the vehicle section there are :



Re Assign Registration No -
This allows you use a registration number on a new car which previously belonged to a different vehicle
Lets say Mr Smith has been a customer for years, his registration is M12 SMT on his Audi. Today he comes in with a BMW and has kept his number plate, so you enter his registration and GA2 looks up his Audi details

By clicking on this button, the registration of the Audi will change to M12 SMT < (date here) and the vehicle details be cleared
allowing you to enter the BMW's information whilst keeping all history for Mr Smith in tact.

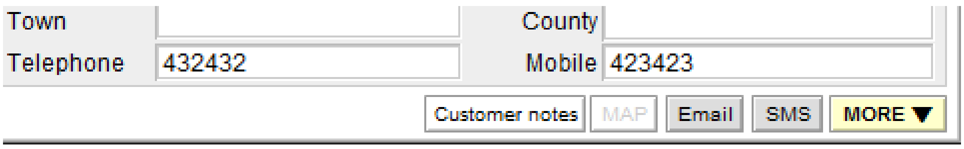
Vehicle Notes
This will highlite if the vehicle has any notes recorded against it and allow you to view them

Attached Docs
This allows you to store references to documents on your computer against the vehicle

Images
This allows you to add images to the database against this vehicle, such as photos of damage etc.

More
This expands the vehicle information to show extra details.

Under the Customer Section there are :



Customer Notes

Map
As long as the customers address is entered, this will show a map for directions from your address to your customers.

Email
This allows you to quickly send an email to the customer

SMS
This allows you to send an SMS message to your customer, either using a pre-set message or by typing a personal one.

More
This expands the customer information to show extra details such as notes.

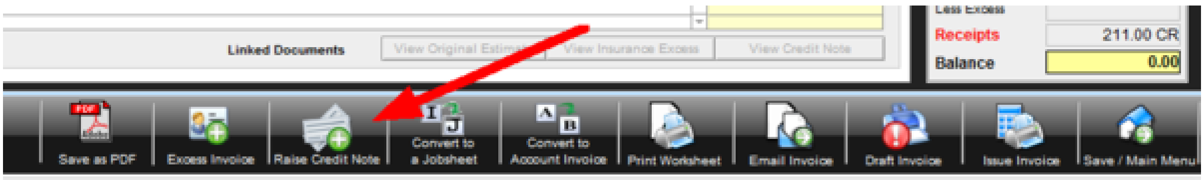
3.3.10 Raising Credit Notes

There are two ways to raise credit notes in GA2, both have their differences which will be outlined below.
It is recommended to always raise a credit note from the existing document, since this will cross link any information and adjust figures accordingly. The credit note will also display which invoice it has been linked with.

1. From Existing Documents (Recommended)

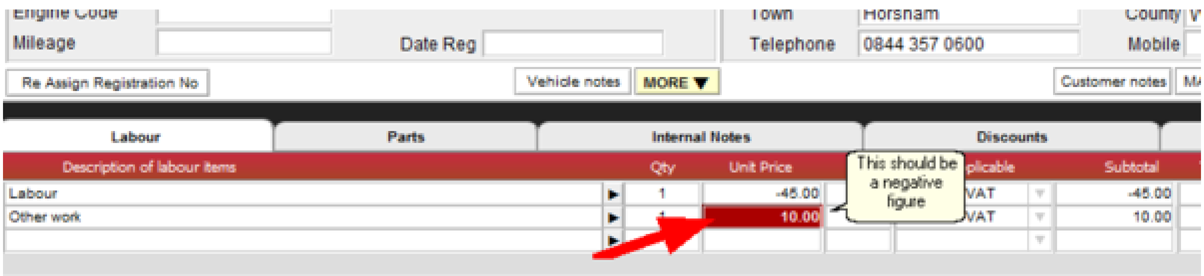
To raise a credit note from an existing document, you first need to locate and Edit the original document by using Quick Search or browsing the document list archives.

When on the document screen, you will notice a raise credit note button in the bottom menu.

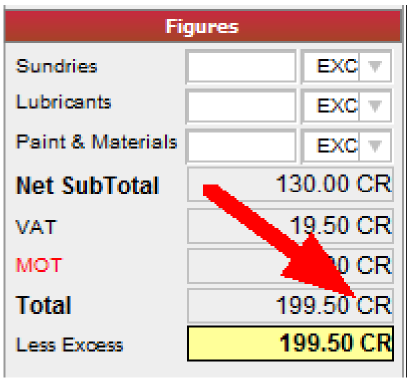


Clicking on this will automatically create a credit note for the full amount of that document, at which point you can then modify or remove items which are not being creditted

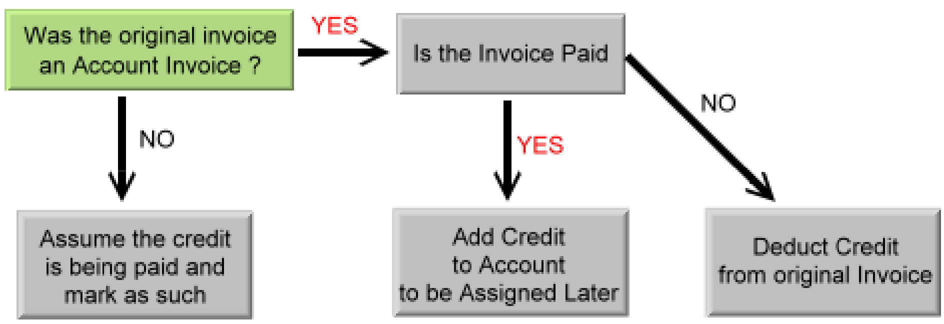
You will notice that the unit prices will now be set as a negative figure, if the figure entered is not a negative, the field will turn red to indicate a fault which needs correcting



You should also notice the figures shown in the lower right will have CR at the end, signifying Credit.



When you issue the credit note, depending on the type of invoice that was initially created, a number of things can happen, which are illustrated in the following flow chart



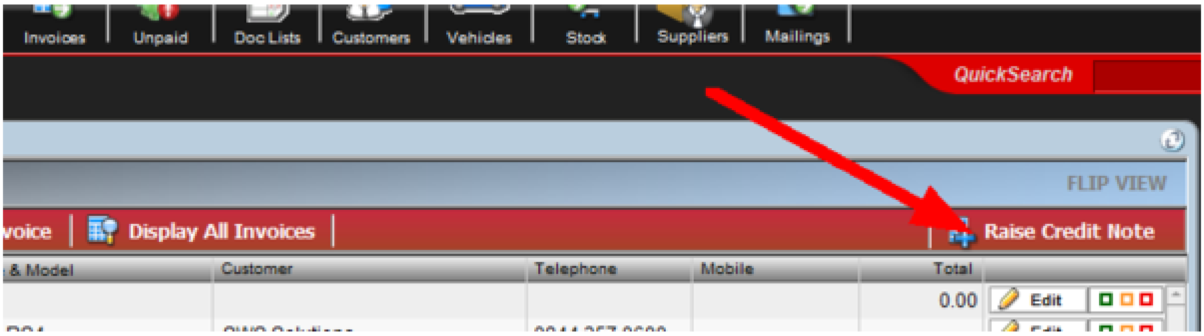
For account invoices, if the invoice you are crediting has been paid in full already by your customer, then the credit note is added to their account to be assigned later, you will need to do this via the Manage Account customers section in the admin area. Their account will show a highlighted red area under the 'To be Assigned' heading to indicate there is a balance on their account which has not yet been used to pay or part pay an invoice.

Assigning credit notes work in the same way as assigning payments, it is recommended you assign the credit note when you receive a payment from your customer, under normal circumstances the payment amount + the credit amount will balance out to the number of invoices they are paying. You can then assign the credit note to ANY invoice in the batch being paid to inform GA2 that the credit has been used.

For Standard invoices, once you issue the credit note, GA2 will automatically assume that you have refunded the customer the amount on the credit note.

2. Without going via the document

You can also raise a credit note, without going via the original document, however this will not link and show a reference to any invoice, nor will it attempt to deduct any balances from the original invoice.
You can raise a credit note directly by clicking on the 'Raise Credit Note' buttons found on the main menu screens



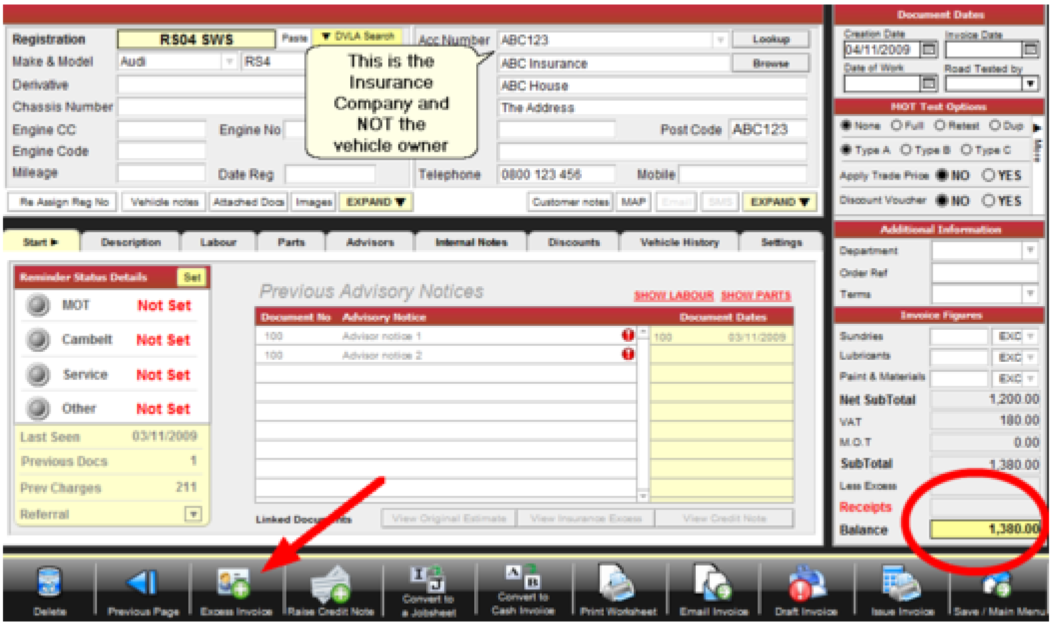
TIP	Ensure you enter all figures on a credit note using the minus symbol - This includes all unit prices and if crediting stock items, also the cost price.

3.3.11 Policy Excess Invoices

If you are carrying out an insurance relating job for a customer, the chances are you may need to issue the customer with an invoice for their insurance policy excess, whilst showing this on the original invoice to the insurance company.

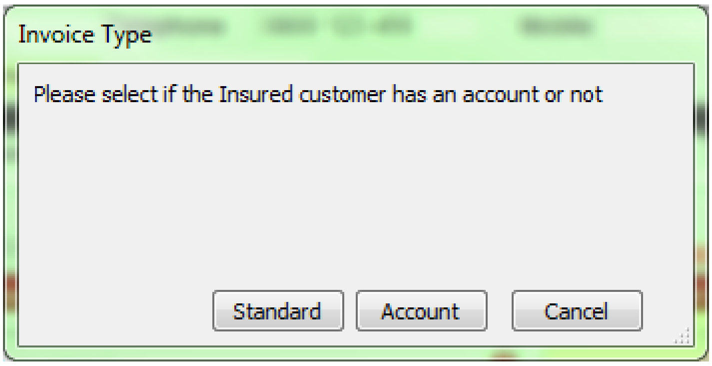
This is a straight forward process in GA2 and can be done as follows :

First you would need to begin by creating the invoice to the insurance company NOT to the customer, in this example our insurance company is ABC Insurance.

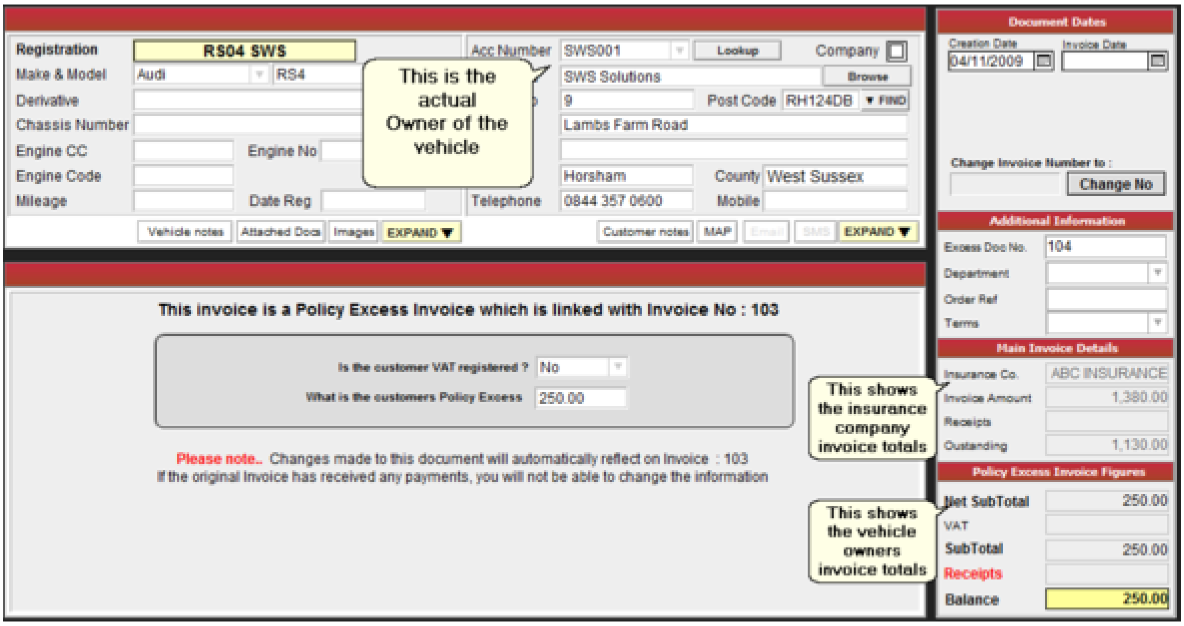


As you can see, this invoice contains the full amount, however the actual vehicle owner will need to pay £250.00 excess

By Clicking on Excess Invoice (indicated above) you will be asked if you wish to create a Standard or Account invoice for the vehicle owner
allowing you to add any policy excess amounts to a customers account if they hold one with you



You will then be presented with a new invoice screen, solely for the policy excess and asking whether or not the customer is VAT registerd.
In most cases if the customer is VAT registered, they will pay the VAT amount of the total invoice along with their excess and the insurance comany will only pay the amount less vat.
On this screen you would also add the actual vehicle owner, in this case it is SWS Solutions.



To illustrate what happens, the following two screenshots show the main insurance invoice when the policy excess is added with both options for the customer being VAT Registered

Invoice Figures		
Sundries		EXC
Lubricants		EXC
Paint & Materials		EXC
Net SubTotal	1,200.00	
VAT	180.00	
M.O.T	0.00	
SubTotal	* 1,380.00	
Less Excess	250.00	
Receipts		
Balance	**1,130.00**	

VAT Registered set to NO with £250 excess

As you can see, when set to no, just the excess amount of £250.00 is deducted from the main insurance invoice

Invoice Figures		
Sundries		EXC
Lubricants		EXC
Paint & Materials		EXC
Net SubTotal	1,200.00	
VAT	* 180.00	
M.O.T	0.00	
SubTotal	* 1,380.00	
Less Excess	430.00	
Receipts		
Balance	950.00	

VAT Registered set to YES with £250 excess

As you can see, when set to yes, the insurance invoice is adjusted automatically and the VAT amount is not included in the outstanding balance. It is however still shown for reference

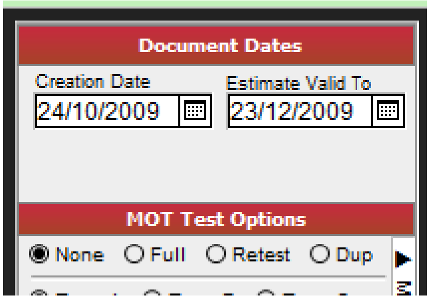
The Excess amount shown will include the VAT amount, hence the policy excess of £250.00 + the VAT of £180.00 being £430.00

Both invoices are stored independently within GA2 and have their own invoice numbers, however they will remain linked together, so any changes to the excess document will automatically update the insurance companies invoice.
When you choose to Issue these invoices, GA2 will automatically print using a different template to show relevant information for the insured and the insurance company

3.3.12 Document Specific Options

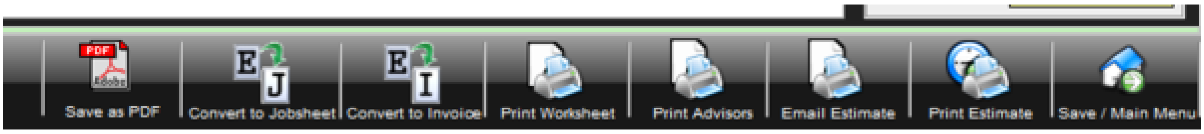
3.3.12.1 Estimates

Estimates contain the following options and buttons



Along the top right, you have the option to choose an estimate valid to date, this defaults to 60 days from creation date and can be setup via the setup wizard.

Once the estimate expires, it will be removed from the 'in progress' areas on the main menu and archived. You can still locate this using the search or browse facilities for future use.

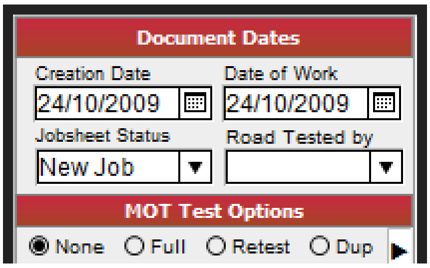


Along the bottom of the screen, are various Estimate specific buttons although these are mainly self explanatory.

TIP	**An estimate will remain on the in progress screens of the main menu until it is converted to an invoice, or the expiry date passes after which time, you can locate it via browsing or searching**

3.3.12.2 Job Sheets

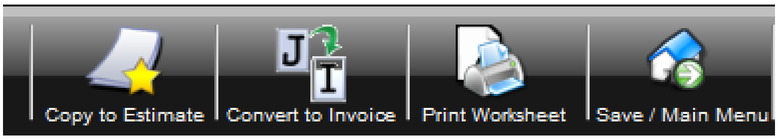
Job sheets contain the following options and buttons



Along the top right, you have the option to choose a date of work, allowing you to create the documents in advance along with the status of the job sheet which offers options for :

- New Job
- Pre Booked
- MOT Only
- Parts Due
- In Progress
- Complete

You are also able to select the technician who road tested the vehicle.

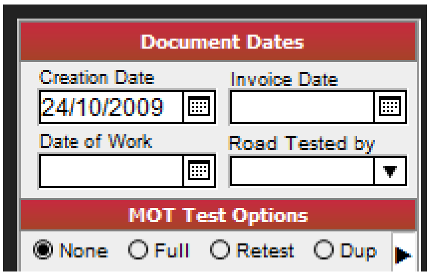


Along the bottom of the screen, are various Job sheet specific buttons although these are mainly self explanatory.

TIP	**The copy to estimate button allows you to make an exact copy of the document as an estimate, leaving both the job sheet and estimate on the system. This is useful if the customer requests some work be cancelled and quoted for at a later date**

3.3.12.3 Invoices

Invoices contain the following options and buttons



Along the top right, you have the option to choose a date of work and road tested by, if you have converted from a job sheet, these values may already be filled in. Invoice date will also automatically be filled in once you issue the invoice, however you can set this manually if you are back dating an invoice

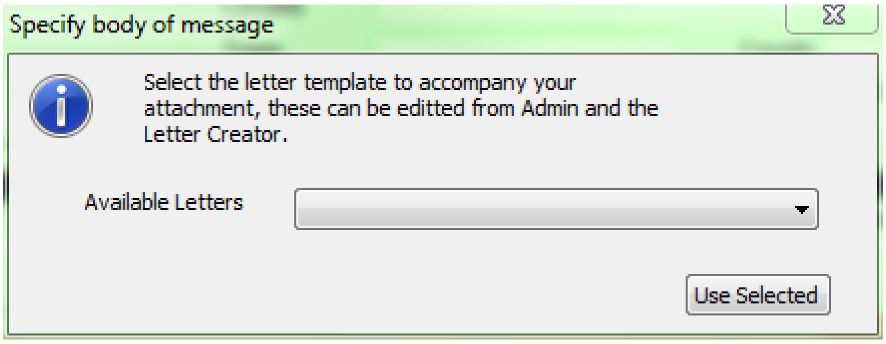
Along the bottom of the screen, are various Invoice specific buttons although some are self explanatory.

Excess Invoice, allows you to create and link a customers policy excess to an insurance invoice

To simplify this, the new excess invoice will only require the customers details and the excess amount, the main insurance invoice will automatically show the linked excess amount and print appropriately

You can also convert an invoice back to a job sheet if you converted it by mistake, or to an account invoice (or vice versa) if you created a standard document instead of an account one.

Email Invoice - Using the inbuilt email system in GA2, this will generate a PDF attachment and send an email to your customer with the document attached, before sending you will also be asked to select a letter template to use as the email message, these can be edited via the admin area.

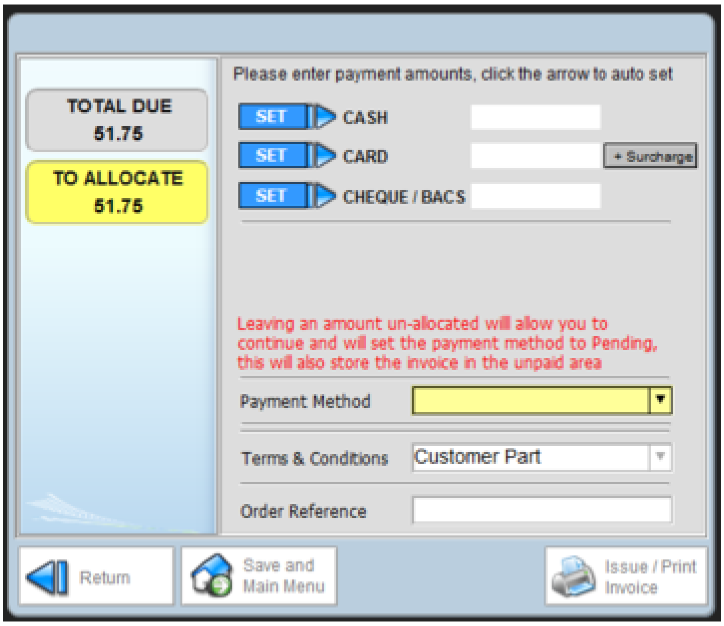


TIP	**To use the email / pdf facilities in GA2 requires you to specify your own email address during setup.** **No other configuration is required, you do not need to have any email system setup on your computer for this to work.**

Draft Invoice - This allows you to print either duplicate, pro forma or draft invoices

Issue Invoice - Until you issue an invoice it will remain as a document in progress, and shown on the main menu screens for quick selection
When you choose to issue an invoice, if it is an account invoice GA2 will ask how many invoice copies you would like and then it would send the invoice to the relevant customers account

If however you issue a standard invoice, you will be presented with a screen to assign payments, as shown below



This allows you to enter the payment information and method of payment

We have also recently added the option of including a credit card surcharge percentage, you can add this to the invoice by entering the full amount in the card section, then clicking on +

surcharge.

TIP	**Surcharge amount is calculated on the value of credit card payment to be made, not the value of the invoice since the customer may be paying part of the invoice by another method such as cash.**

3.4 Stock Control System

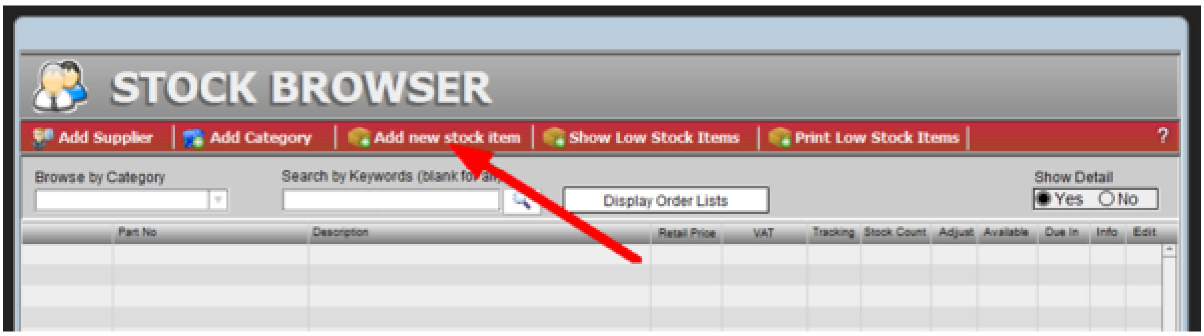
3.4.1 Adding Stock

There are various ways to add stock into Garage Assistant, to get started we recommend first going into the Administration area and choosing Stock System Manager.

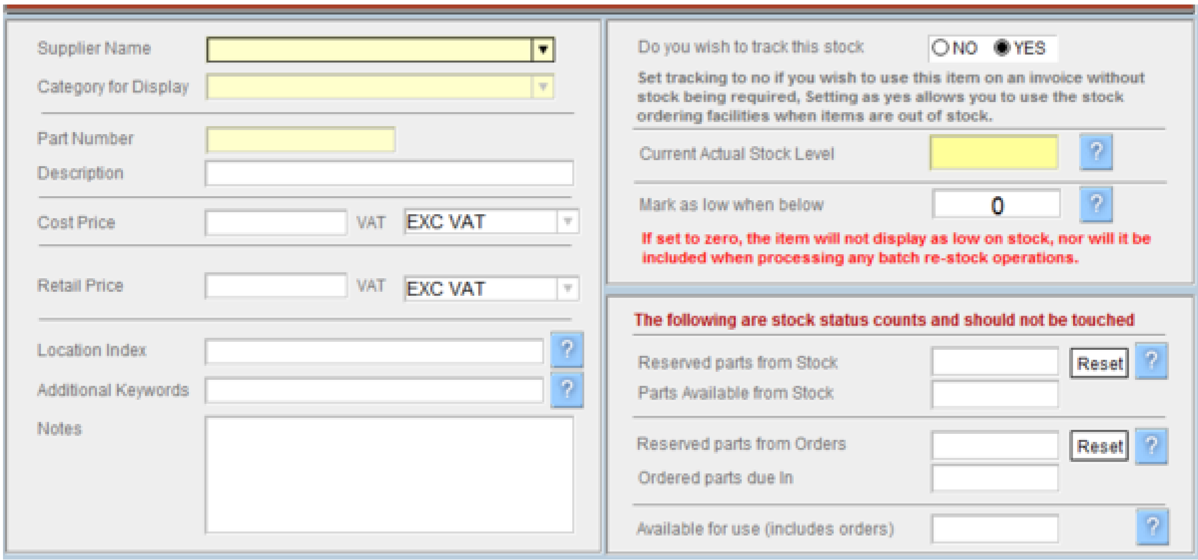
First Click on Manage Suppliers, from here you can proceed to add your current list of suppliers. When finished click Main Menu

Next Click on Manage Stock Categories, from here you can create an unlimited amount of categories for easy browsing of your stock. Categories can be set up to your preference such as by manufacturer or by type.

Finally click on Manage Stock and choose Add Stock Item



You will now be presented with a new window to add the specific details of the stock item.



Select the supplier from the drop down list, along with the required category for displaying the part.
Enter all the details such as cost / sale prices and quantity in stock

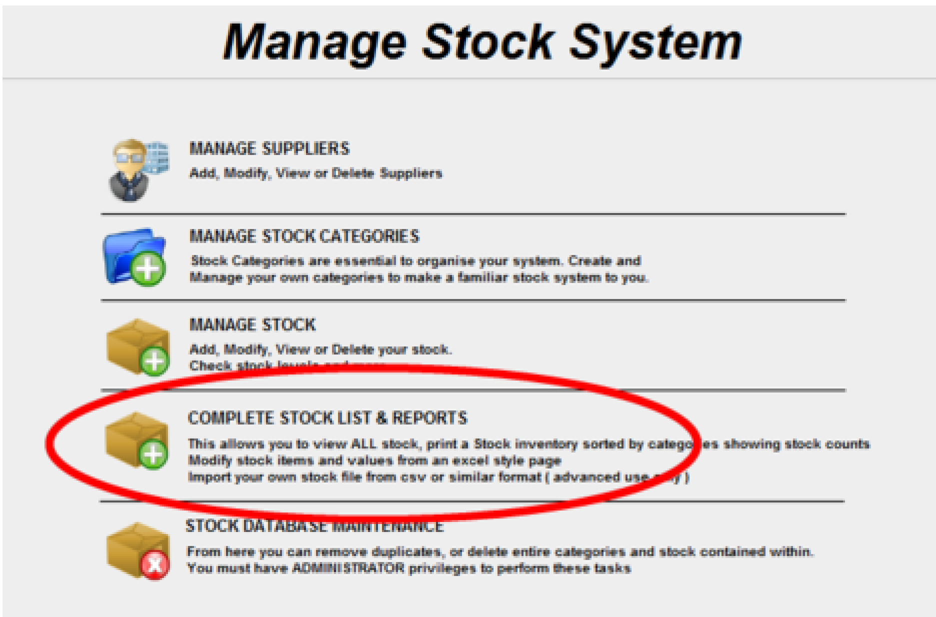
The additional keywords field can help when searching for the item in your stock, you could enter a list of vehicles this part is fitted to allowing you to for instance search for BMW Oil filter.

Once you are happy with the details click on Save Stock Item.
This stock item will now be available for use when creating a document.

> If you do not wish to use Stock Counting you can select No for tracking the stock item, allowing you to use it for quick data entry only.

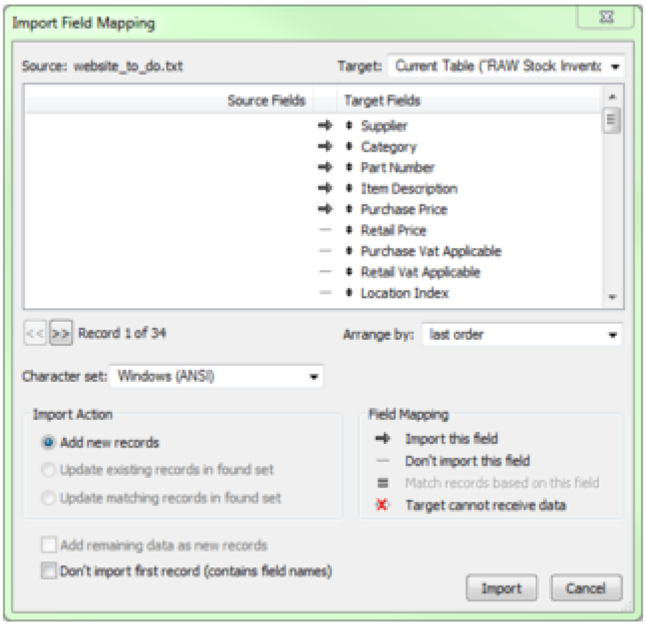
3.4.2 Importing Stock

If you wish to import your current stock list from a CSV (comma separated) file click on "Complete Stock List & Report's" in the Admin area and choose the Import (advanced) button from the lower left.



Locate the CSV file you wish to use and click open.

You will be shown a screen similar to below, where you can match up the fields in our database with those of your data by dragging the target fields into position using the small up/down arrows. **Each field with the arrow showing will be imported.**



We have allowed importing into the following field, you must match them up manually by dragging the items in the following window.

- Part Number
- Item Description
- Purchase Price
- Purchase Vat Applicable
- Retail Price
- Retail Vat Applicable
- Supplier
- Category
- Location Index
- Notes
- In Stock (qty)
- Low Level

Once imported you can use the current page like an excel spreadsheet to manually alter any values required.

TIP

Using the option for Update Matching records in found set, will allow you to selectively import prices for instance, but leave all stock counts if you wanted to update your database using a suppliers stock file.

If doing this, you would change the arrow on part number to an equals sign followed by removing the arrow on any fields to do with quantity
Changing the arrow is done b clicking (see the field mapping section in above screenshot)

We recommend a TEST import first of under 5 items in case the import doesn't go as planned, its easier to delete 5 than 2000

3.4.3 About Automated Stock Orders

Depending on your stock settings in the setup wizard, GA2 can automatically generate orders for items as and when they are used on job sheets or invoices.

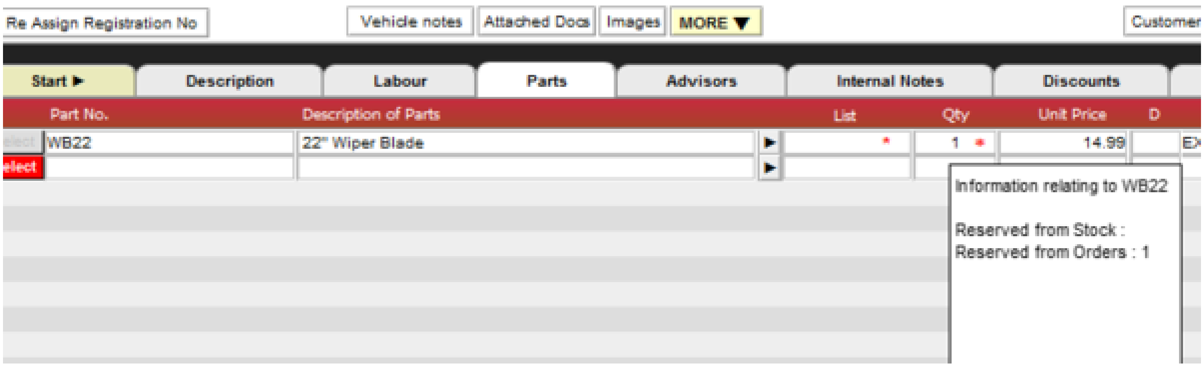
With Stock Order Management Enabled, If a stock item has insufficient quantity available and you add it to an invoice, GA2 will automatically create an entry in the order system prompting you to order x amount of a certain item, these will be grouped by supplier.

If an order for a supplier is already on system and not yet been placed, any new items will be appended to that order.
The stock status on the document will then show as reserved from orders (if you hover your mouse over the quantity)

In our sample database we have a stock item which is being tracked with a quantity of 0

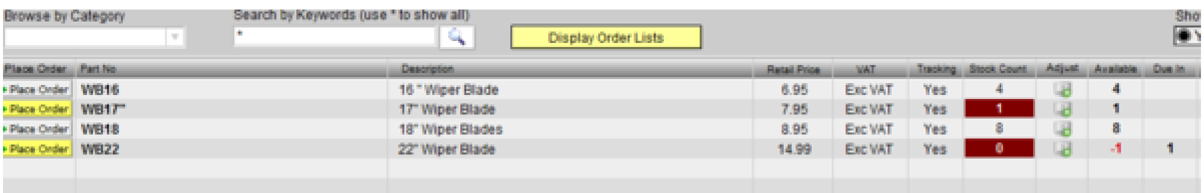
You can see that WB22 is showing as Stock Count 0 and Available 0, also note the place order button is highlighted

If we now proceed to add this part to an invoice, an order will be generated and the item will be reserved for the invoice.



By hovering the mouse over the quantity, you can now see the item is reserved from an order and a red * is placed next to the quantity as a visual indication that the quantity is not available.

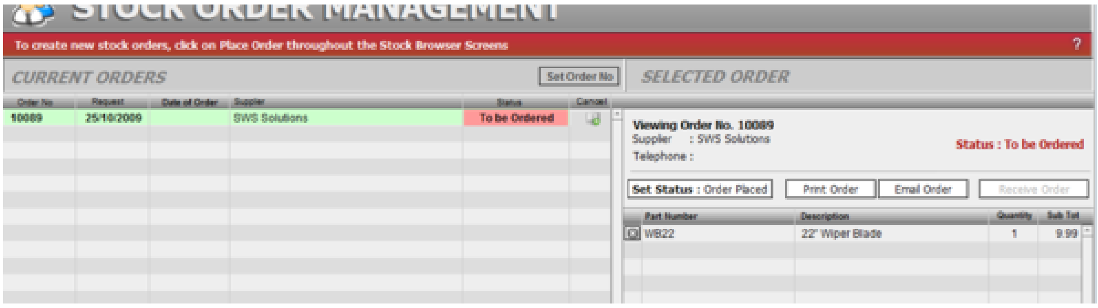
Checking back in the stock system, you will also see the available and due in figures change to match the status of the stock item



As a visual indicator, you will notice that underneath the main menu bar there will now also be a message stating "You have orders for stock waiting to be placed"
You can click this and it will take you directly to the stock ordering section, or on the stock screen click Display Order Lists

Under Current orders, there will be a new order grouped by the supplier, clicking on this will reveal more information to the right hand side, showing what items require ordering. From here you can print or email the order and also manually set the order as placed.

> TIP: By setting the order as placed you are telling GA2 that you have ordered these items. Any new items required from the same supplier will generate a new order



Once you receive the order from your supplier, you would simply go back to your order management section and click on Receive Order, this would prompt you to check and adjust where necessary the quantity of items you have received. If something has not been received you can leave it pending until the item turns up or cancel it.

By telling GA2 you have received the order, it will automatically update both the invoice status to 'reserved from stock' and also the stock database as you can see below

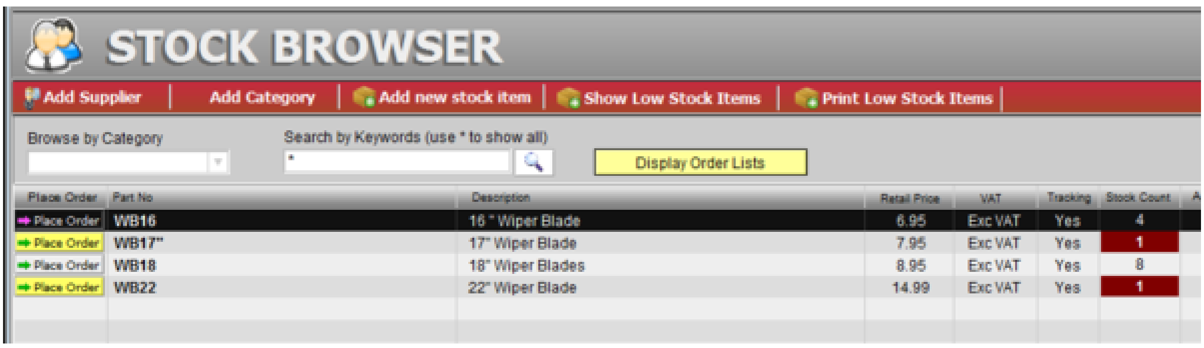
Because the item is reserved for the invoice we created at the start, the available count is set to 0 however stock is showing that you now have 1 in your possession. Once you issue the invoice, the reserved item will be allocated and taken out of stock.

3.4.4 Manually Ordering Stock

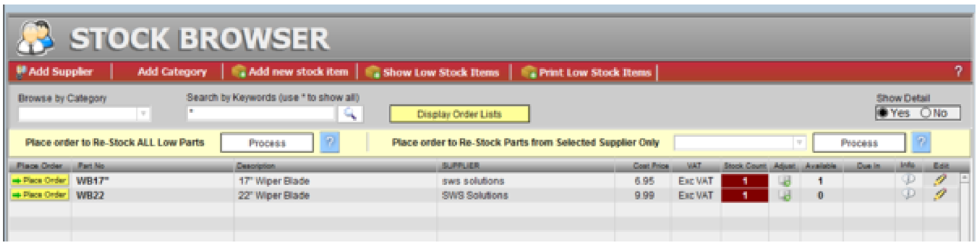
When adding items to the stock database, it is a good idea to tell GA2 at what level you would like to re-order your stock items by specifying the value in 'Mark as low when below' field in the add / edit stock screen

When the item is low aside from using the automated ordering system, you can also go into the stock page and individually place an order for items, or re-stock based on supplier.

From each stock window you will see to the left of each item a Place Order button, this is for individually ordering each item, it will highlight in yellow if the quantity is low.



You can also click on 'Show Low Stock Items' in the menu bar, which gives you additional options for placing orders and also shows a complete list of all items which are low on stock



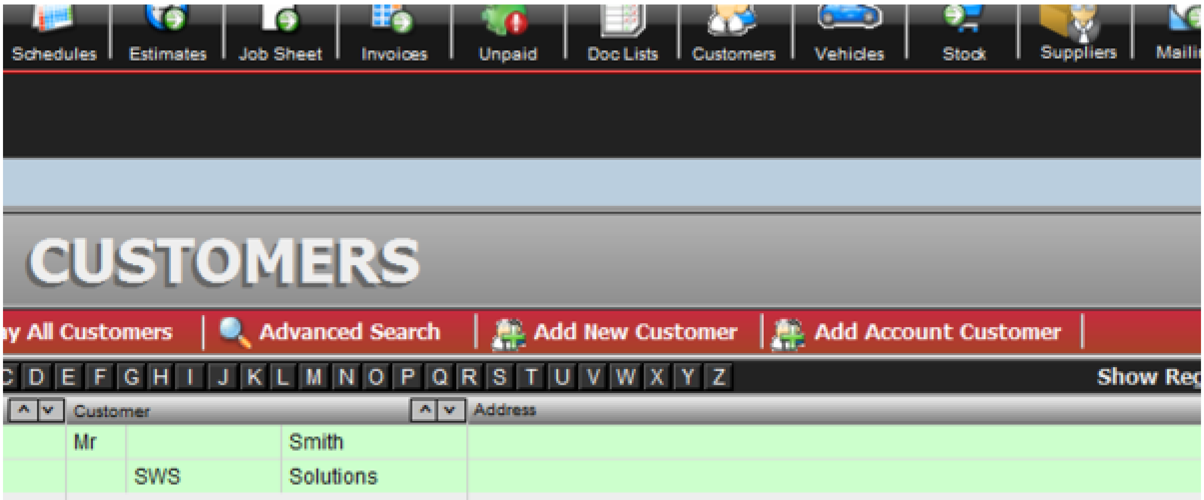
The process buttons will generate an order in GA2 for you to print and manage via the Display Order Lists section.
Stock quantities will only be updated once you click to receive the order from that screen.

You can also manually edit or adjust the stock quantities for each item, however this is recommended for corrections only.

3.5 Customer Database

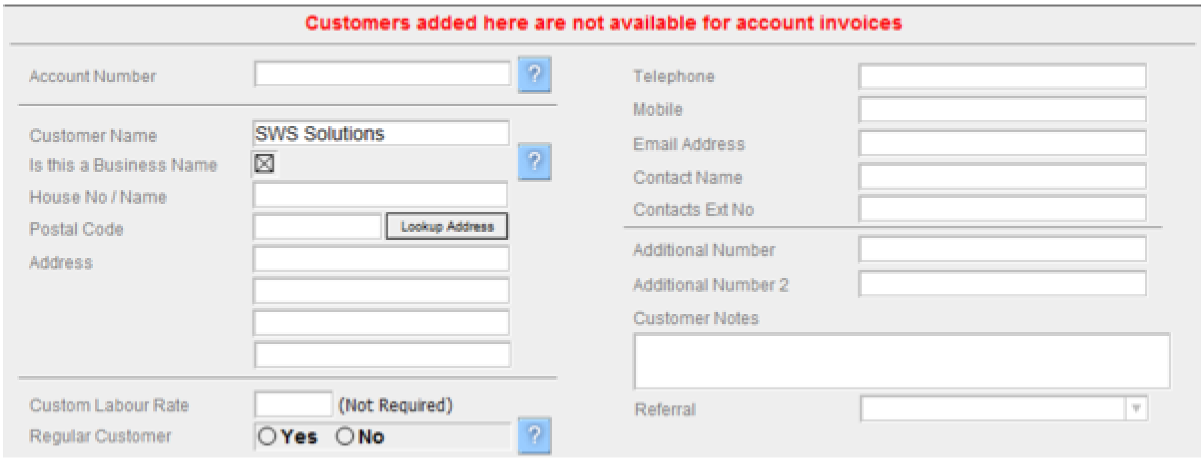
3.5.1 Creating Customers

You are not required to add customers into the database prior to creating a document unless the customer is to hold an account with you
If you want to add customers you can do so by clicking either Add New Customer or Add Account Customer buttons



When creating the customer, you will be asked for some basic information.

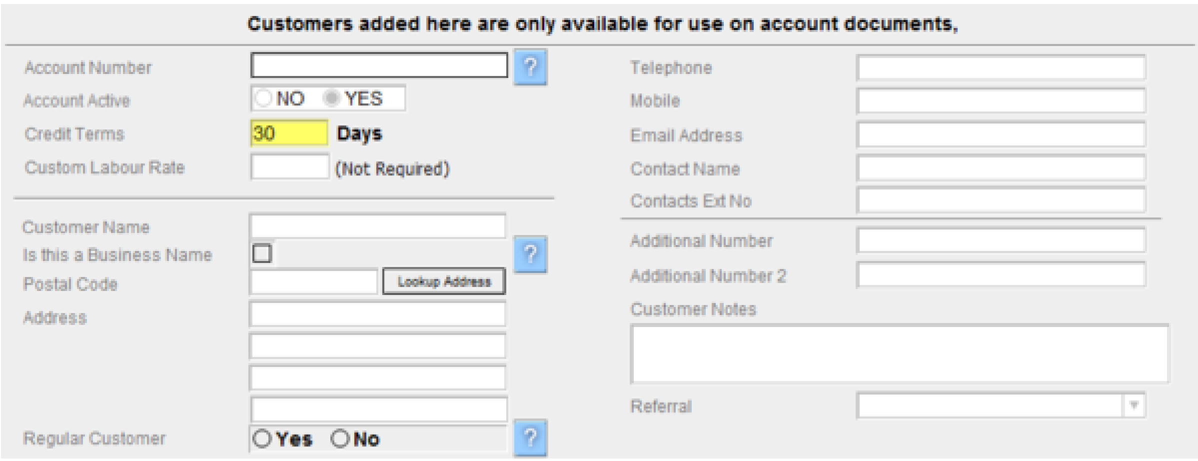
The account number field does not have to be filled in, if it is left blank it will automatically generate an account number based from the surname and next available 3 digit number, such as SMI001 for Mr Smith, however if you tick the 'Is this a business name' field lets say for SWS Solutions, the account number would generate from the first word and would become SWS001



Standard Customer Creation Screen

You can also specify a custom labour rate, this will be looked up when adding labour items to a document as long as the customer is selected first.
The Regular customer option, just adds an extra ability to locate the customers easier when browsing the database

The account customer screen is slightly different as shown below, mainly you are asked for their credit terms and whether or not you want the account to become active.



Account Customer Creation Screen

3.5.2 Customer Profiles

The customers profile screen, available by clicking on Customers then Profile next to the relevant customer, shows their contact details along with a list of issued invoices and vehicles they own, from here you can

- Edit the customer Details
- Send an email
- Send an SMS Message
- View a map of their location
- View all previous invoices you have issued to the customer
- View all vehicles recorded as being owned by the customer
- Jump to the Vehicle Profiles
- Print Vehicle History
- Add new Vehicles
- Print a contact information sheet
- Print a statement (even for non account customers)
- Convert a standard customer to an account customer

3.6 Vehicle Database

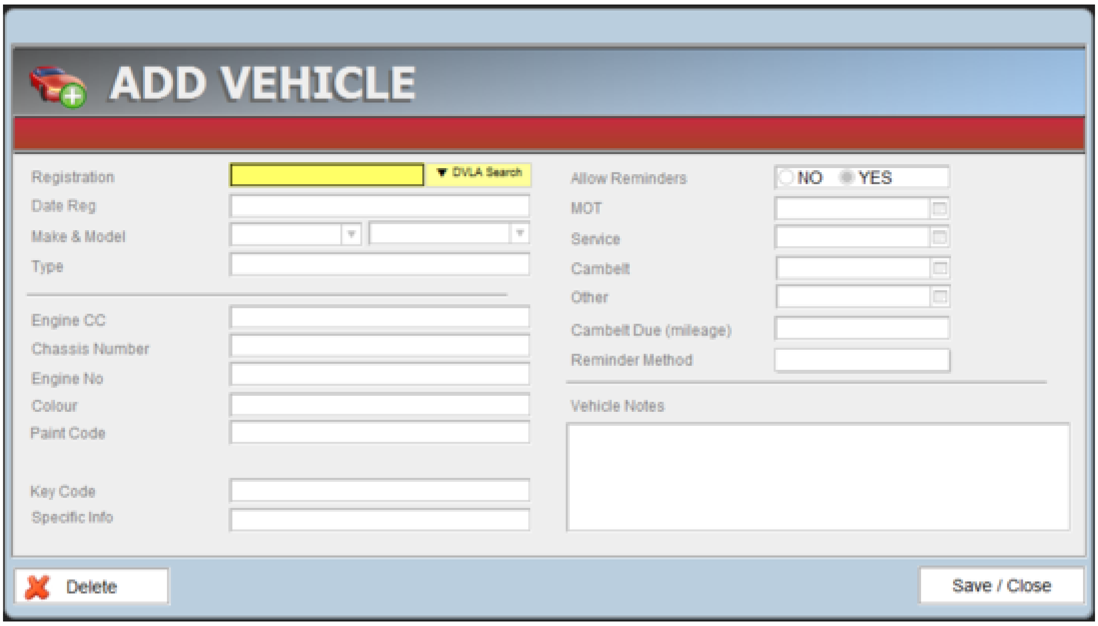
3.6.1 Adding Vehicles

Adding a vehicle manually into GA2 can only be done via the customer profile, this ensures that the vehicle has a link to an owner from the start, otherwise any mail shots such as MOT reminders would print with blank customer details

To add a vehicle, first browse for the correct customer or add the customer as described earlier Then go into the customers profile screen

From their click on Add New Vehicle in the menu bar

You can then proceed to enter any relevant information or perform a DVLA lookup to auto fill the details



3.6.2 Vehicle Profiles

The vehicle profile screen, available by clicking on Vehicles then Profile next to the relevant vehicle, shows the vehicle information and also all previous invoices, history and advisor.

From here you can

Edit the vehicle
Print vehicle history
Change the owner of the vehicle
View stored images against the vehicle
View referenced documents against the vehicle
View previous invoices
View additional vehicle specifications and details
View a list of all labour carried out with dates and mileage
View a list of all parts fitted with dates and mileage
View a list of all advisor notices with dates and mileage
View and edit reminder dates
View and edit vehicle notes

You can also add previous registration numbers to a vehicle, this will automatically link the history between two or more registration marks for added convenience

3.7 Mailshots / Reminders and Mass Mail

3.7.1 Performing Mailshots

When vehicles in your database are approaching the date of a reminder you will be able to perform the mailshot.

The vehicle reminder will start to show on the mailshot screen 30 days before it is due, giving you enough time to action it and the customer enough time to respond.

Depending on how you initially set the reminder, clicking on either Perform ALL mailshots or individually clicking the Perform Mailshot buttons under each heading will start the process of sending the reminders

This will automatically and in one click

- Send an email to any customers who you set for email reminders
- Send an SMS Message to any customers who you set for SMS reminders
- Print out a reminder letter for posting to all other customers
- You will also get a landscape sheet for your reference with a list of all customers who where

included in the mailshot

> Depending on your options after performing the mailshot, the reminder will be set to the next due date automatically or cleared and have to be manually set again.
>
> Under each circumstance a note is added to each vehicle stating when a reminder was issued and what the original due date was

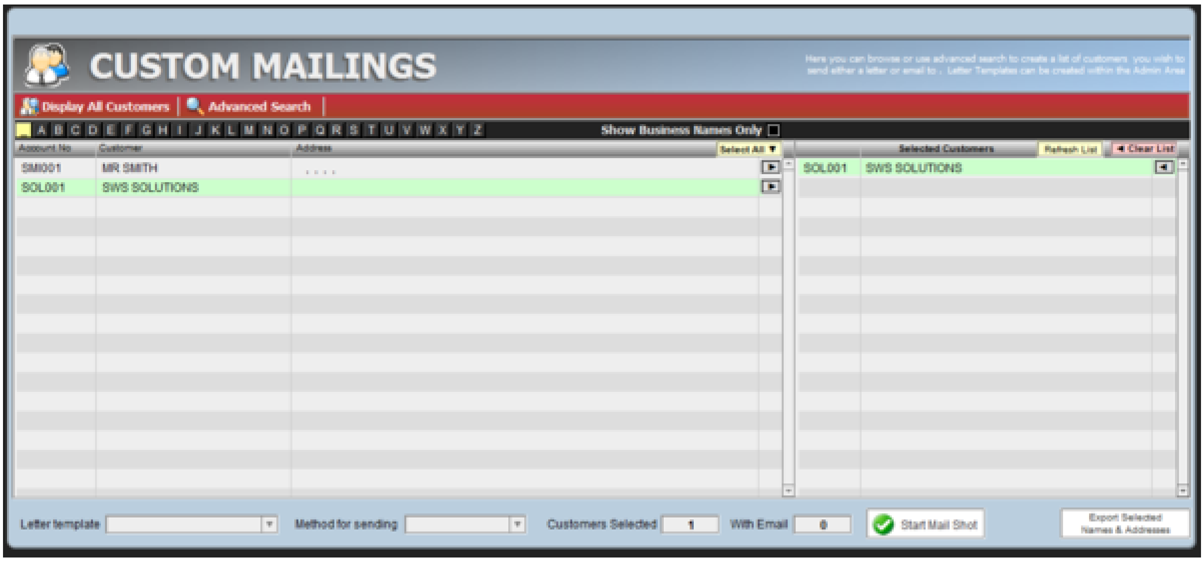
If you click on Display list, you will be shown a list of all customers due a reminder, here you can postpone the reminder if required or perform the reminder for an individual customer

The Find Previous lists allows you to look back at what reminders you have performed previously

3.7.2 Custom Mailshots

The Custom mailings feature is designed for sending promotional material, address changes or similar and unlike the reminder mail shots, is specific to the customer and not the vehicle, although you can include vehicle information, if the customer owns more than one vehicle only the first one will be used.

By Selecting Custom Mailings you are able to send out Emails or Print out Letters based on templates you have created in the Document Creator section of the administration area.



You can browse or search for a list of customers, then select them individually or select all for the mail shot
Along the bottom you can choose the letter template and method for sending, followed by Start mailshot

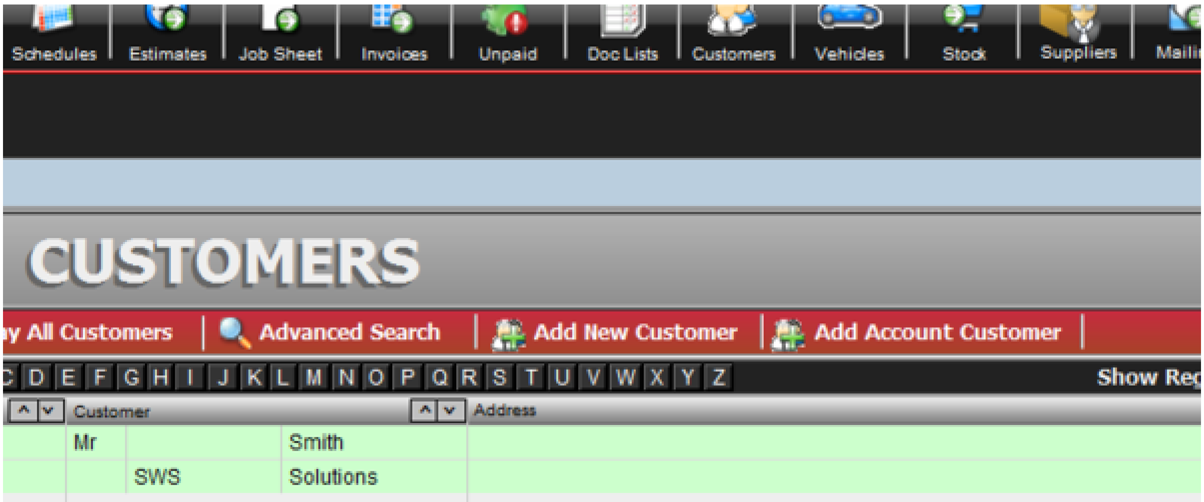
Only the customers listed on the right hand side will be processed by the mail shot, if you choose to send by email and the customer does not have a valid email, they will be skipped but also highlighted in red to indicate that

> From here you can also choose to simply export the selected names and addresses, rather than performing the mailshot

3.8 Managing Account Customers

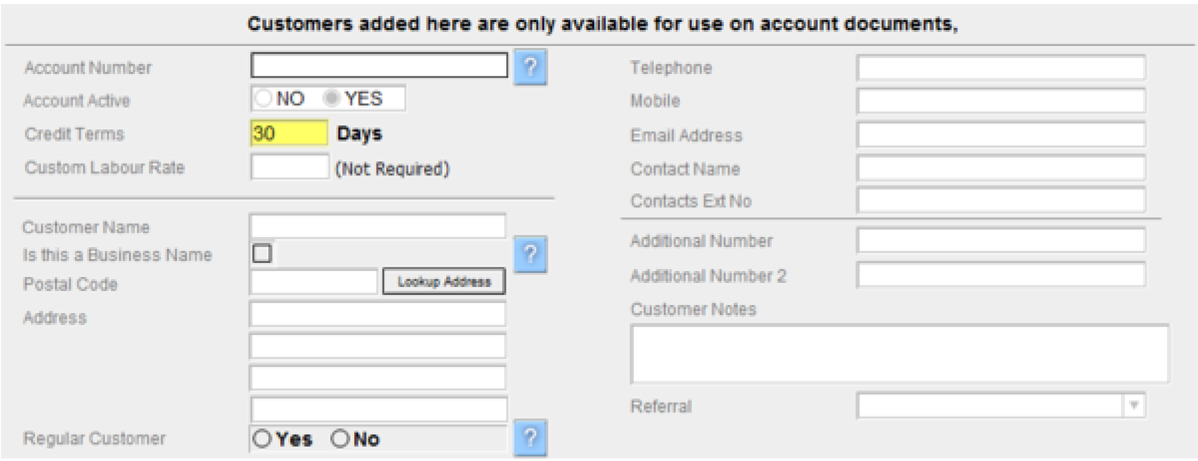
3.8.1 Adding new Accounts

You are not required to add customers into the database prior to creating a document unless the customer is to hold an account with you
If you want to add customers you can do so by clicking either Add New Customer or Add Account Customer buttons



When creating the customer, you will be asked for some basic information.

The account number field does not have to be filled in, if it is left blank it will automatically generate an account number based from the surname and next available 3 digit number, such as SMI001 for Mr Smith, however if you tick the 'Is this a business name' field lets say for SWS Solutions, the account number would generate from the first word and would become SWS001



Account Customer Creation Screen

You can also specify a custom labour rate, this will be looked up when adding labour items to a document as long as the customer is selected first.

The Regular customer option, just adds an extra ability to locate the customers easier when browsing the database

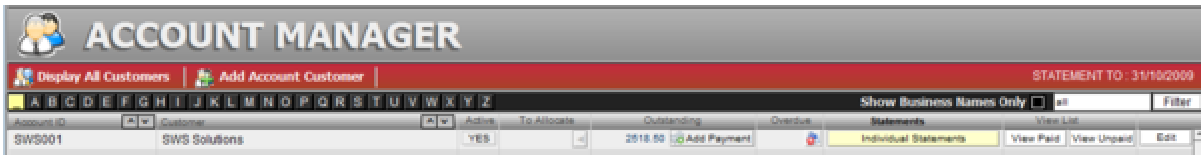
3.8.2 Viewing Accounts and Balances

To view account balances you will need to go to

1. Admin
2. Manage Account Customers

From here you can

- Browse or view all account customers,
- Print individual statement
- View individual account invoice lists
- Add payments to the account
- Allocate any remaining payments or credit notes
- Print statements for ALL accounts
- View all unpaid invoices



3.8.3 Printing Statements

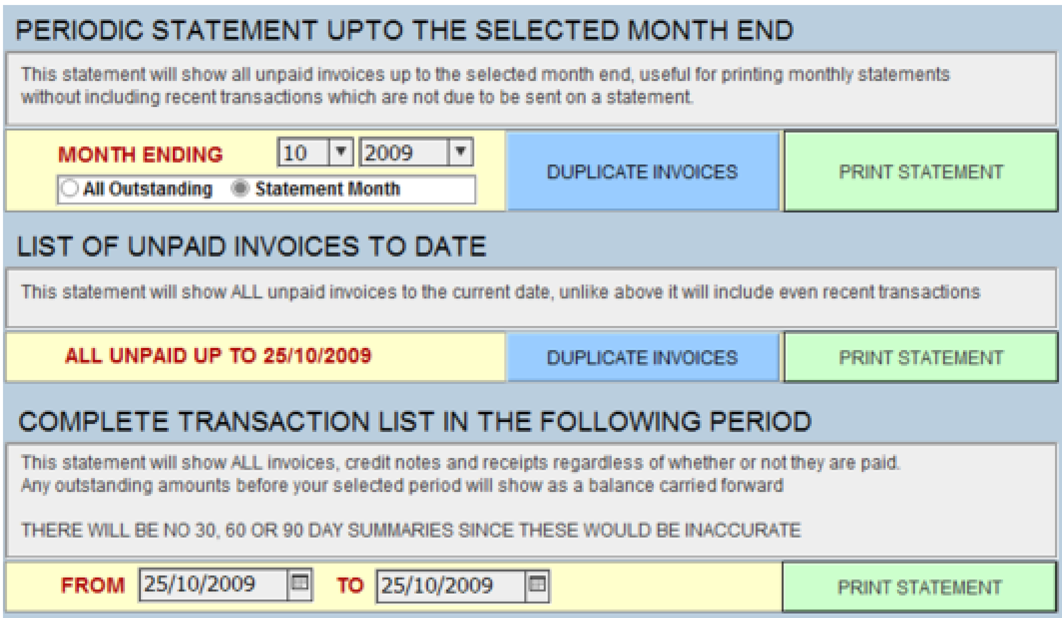
To view print account statements you will need to go to

1. Admin
2. Manage Account Customers

You can then choose to print statements for all customers using a single click, with options to specify the month end for statements to run to

You can also print individual statements for each customer as required, by locating the customer and choosing the statement option

This will show a screen asking what type of statement you wish to print allowing you to print up to the month end, or complete transaction listings for a particular date range



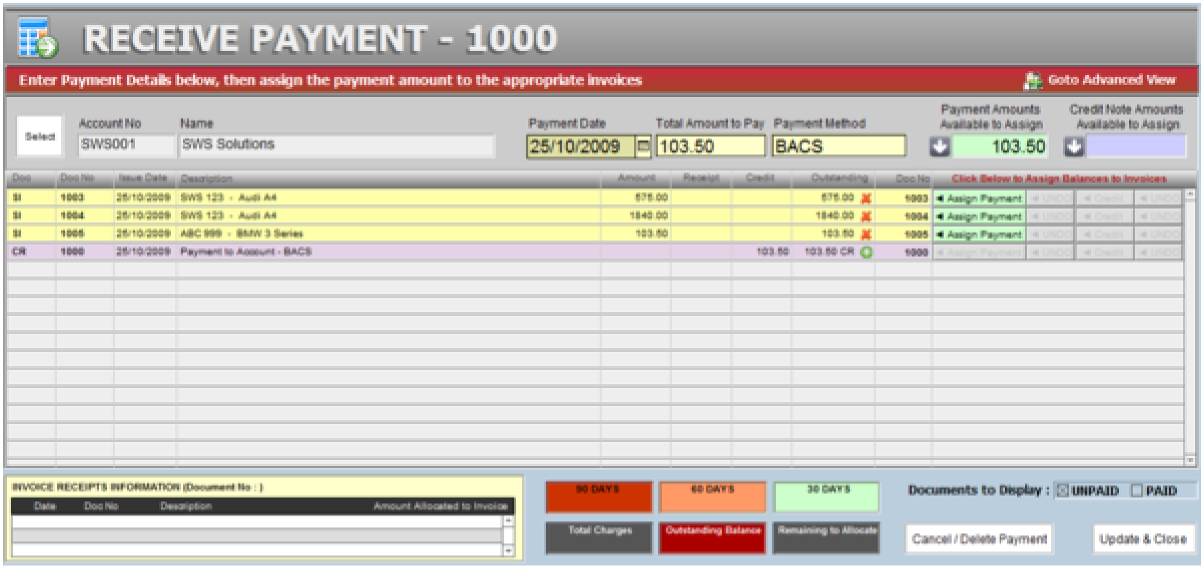
3.8.4 Paying Account Balances

To pay balances off an account you will need to go to

1. Admin
2. Manage Account Customers

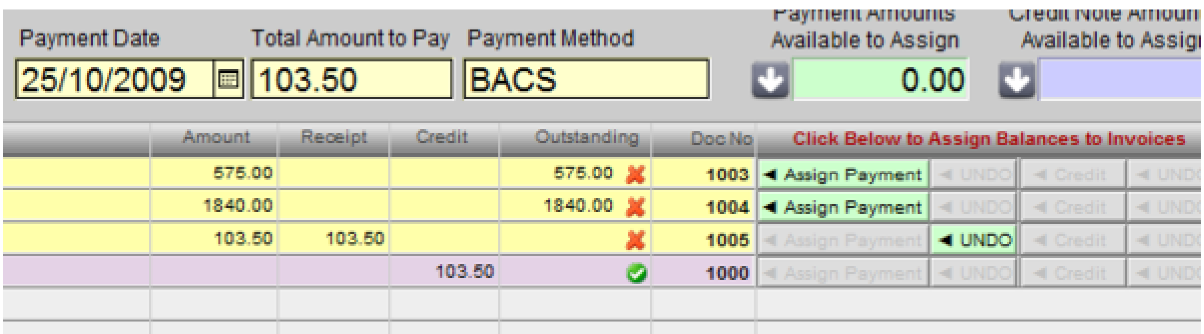
From here you will need to locate the customers account to which you need to add a payment against, by browsing or displaying all customers

Once you have located the account, click on Add Payment along the same line as the account in question, this will take you to the payment screen

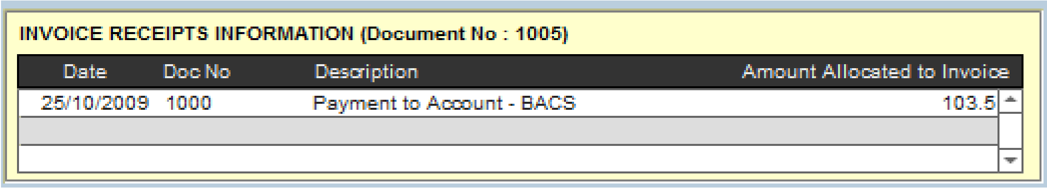


Here you would enter the total amount being paid and choose the corresponding payment method, you can also modify the payment date as required.

The listing will show all outstanding invoices on that account, next to each invoice is an assign payment button, which will allow you to assign payment from the available amount to pay off that invoice, by clicking on the relevant assign payment buttons for each invoice the customer is paying, the available to assign will be deducted.



This will also create a record of how the invoice was paid, shown in the table to the lower left.



If you make a mistake, you can click undo to remove the payment from the invoice, it will then become available to assign again.

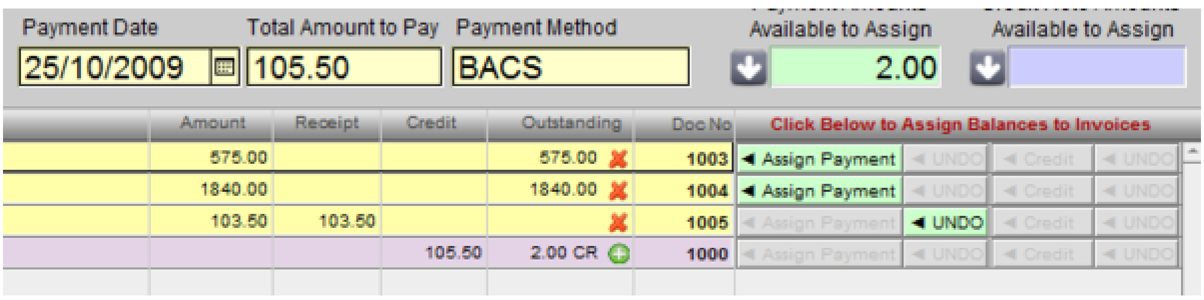
Finally clicking on Update & Close will perform a check on the listed invoices to see if they are paid in full, if so you will be prompted to print out a payment advise sheet
The relevant invoices will then be updated and marked as paid, whilst adjusting the balance of the account accordingly

Important Notes :

The button for 'go to advanced view' is for corrections and maintenance, and should only be used for such purposes or if advised by a member of SWS

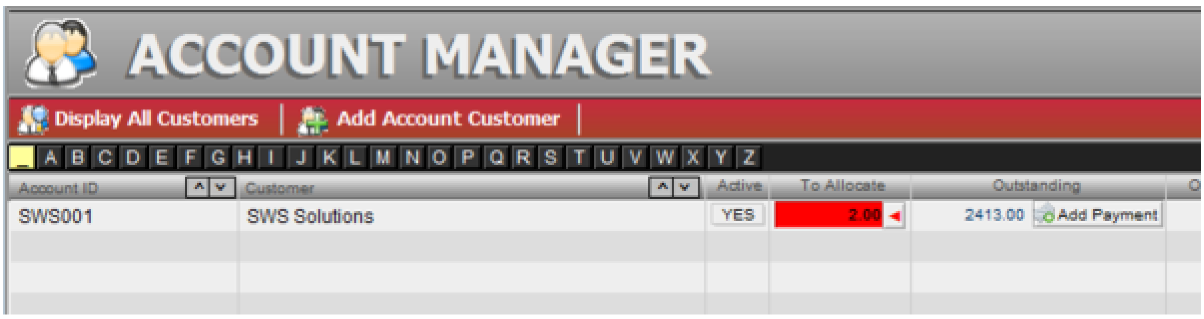
If you leave a partially outstanding payment and choose to update & close, this will remain as a balance available to assign and will show as such on the account manager screen

For example below the invoice for £103.50 has been paid with a payment entered for £105.50 leaving £2.00 available to assign



You will then be warned when clicking update & close of this, however can still continue.

The account manager screen will then show this is bright red, to warn you that their account has un-allocated amounts



You can later assign this balance in the same way as described above to another invoice.

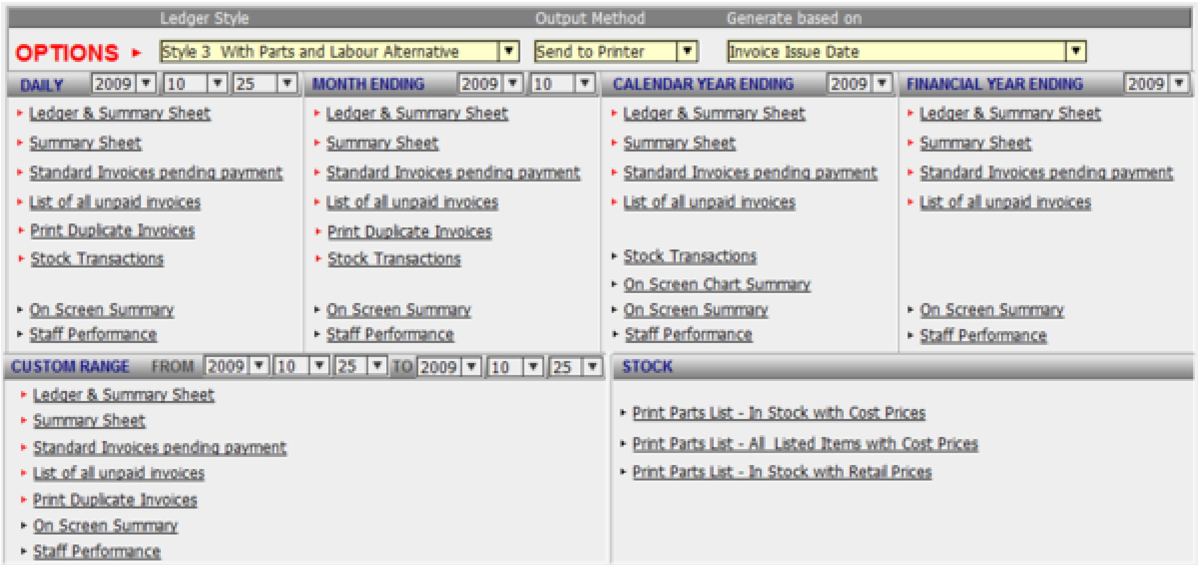
3.9 Reports & Charts

3.9.1 Generating Reports

You can generate reports by going into

1. Admin
2. Business Reports

From here, you can print, save to PDF or view on screen Daily, Monthly, Yearly, Financial Year or custom date ranged information

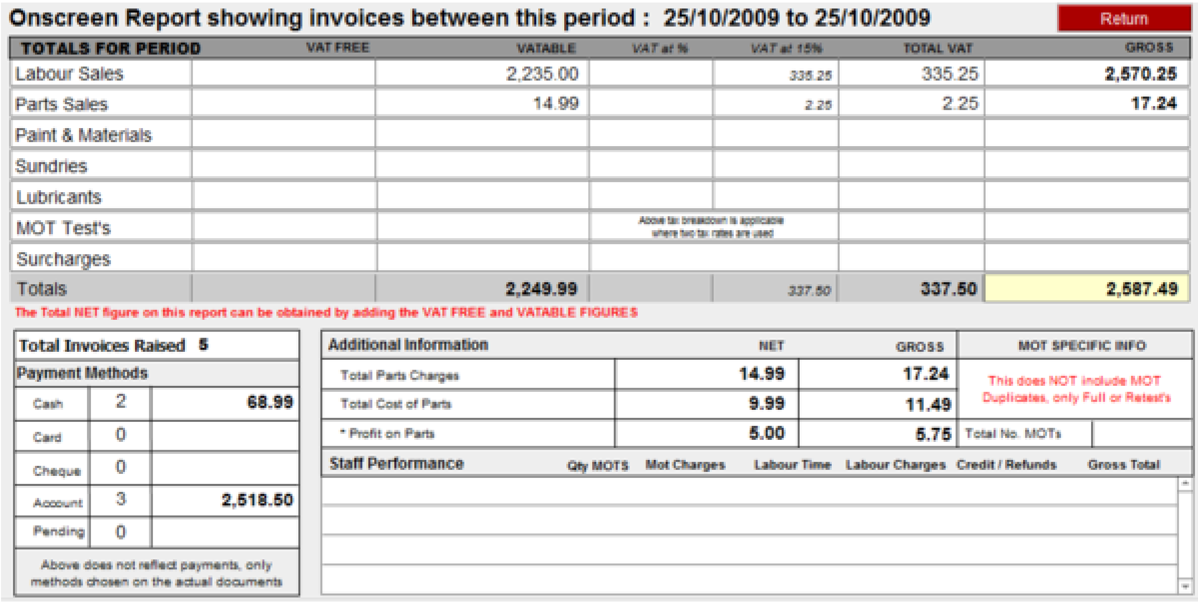


The ledger will group all date by either Issued Date or Payment Date depending on what you select, and show grand totals at the bottom

Information displayed includes :

- Date
- Invoice Number
- Payment Method
- Vat Free Amount
- Net
- Vat
- Gross
- Running Total

You can also view or print a summary sheet for a selected period which includes an overview of the figures broken down into sections such as Labour and Parts



Onscreen Report showing invoices between this period : 25/10/2009 to 25/10/2009 Return

TOTALS FOR PERIOD	VAT FREE	VATABLE	VAT at %	VAT at 15%	TOTAL VAT	GROSS
Labour Sales		2,235.00		335.25	335.25	**2,570.25**
Parts Sales		14.99		2.25	2.25	**17.24**
Paint & Materials						
Sundries						
Lubricants						
MOT Test's			Above tax breakdown is applicable where two tax rates are used			
Surcharges						
Totals		**2,249.99**		337.50	**337.50**	**2,587.49**

The Total NET figure on this report can be obtained by adding the VAT FREE and VATABLE FIGURES

Total Invoices Raised 5		
Payment Methods		
Cash	2	68.99
Card	0	
Cheque	0	
Account	3	2,518.50
Pending	0	

Above does not reflect payments, only methods chosen on the actual documents

Additional Information	NET	GROSS
Total Parts Charges	14.99	17.24
Total Cost of Parts	9.99	11.49
* Profit on Parts	5.00	5.75

MOT SPECIFIC INFO

This does NOT include MOT Duplicates, only Full or Retest's

Total No. MOTs

Staff Performance	Qty MOTS	Mot Charges	Labour Time	Labour Charges	Credit / Refunds	Gross Total

Also available from here is the ability to display staff performance figures, if you select a technician on each relevant labour line on an invoice, this will give an indication of the hours worked and income for your chosen period

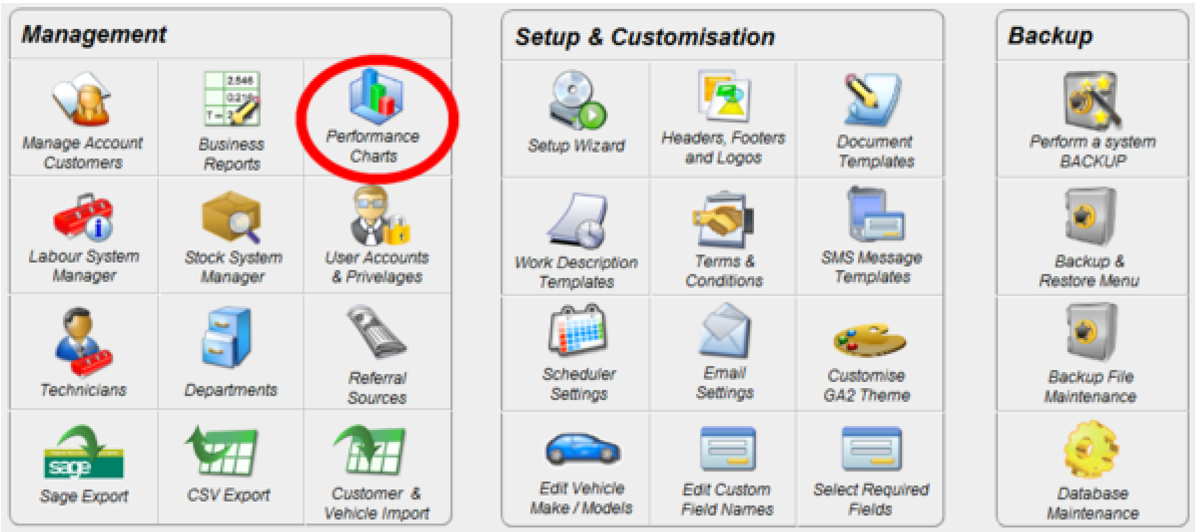
Finally, you can also print Stock Transaction records or Inventory reports

3.9.2 Generating Charts

GA2 has a number of charts available to view / print and more are being added within updates over time

To view charts you would need to go to

1. Admin
2. Performance Charts

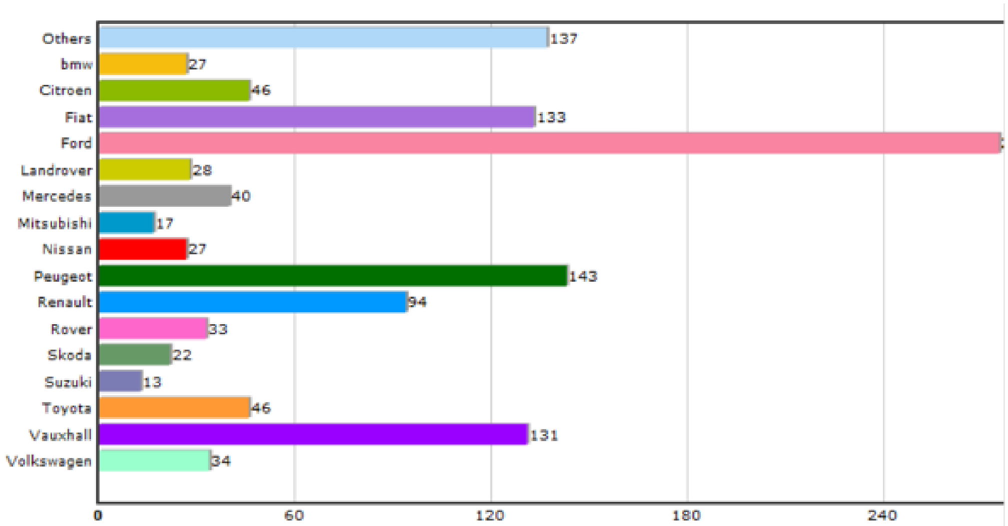


You are then given a variety of options such as selecting a year or range, department, customer and chart type
The list of available charts include :

- Gross Sales
- Gross Sales & Previous Year Comparison

- Gross Sales with split data (labour / parts)
- Referral Statistics
- Overall Department Totals
- Count of Vehicle Manufacturers
- Count of Invoices per technician

For instance, the chart below shows how many vehicles of each manufacturer have been worked on in 2009
This gives us a good indication that our most popular vehicle in for work is Ford.



3.10 Sage Exporting

3.10.1 Exporting to Sage Pre 2010

Garage Assistant has a module to export to sage, full instructions are also shown on the sage export screen.

When you export to sage, there will be 3 files created you can change the names of these, however they default to :

- Customers.csv
- Sales.csv
- Payments.csv

The files will be saved into a folder on your hard drive called GA_EXPORTS

Each export will only export records which have not previously been posted to sage, this is to prevent possible duplicates.

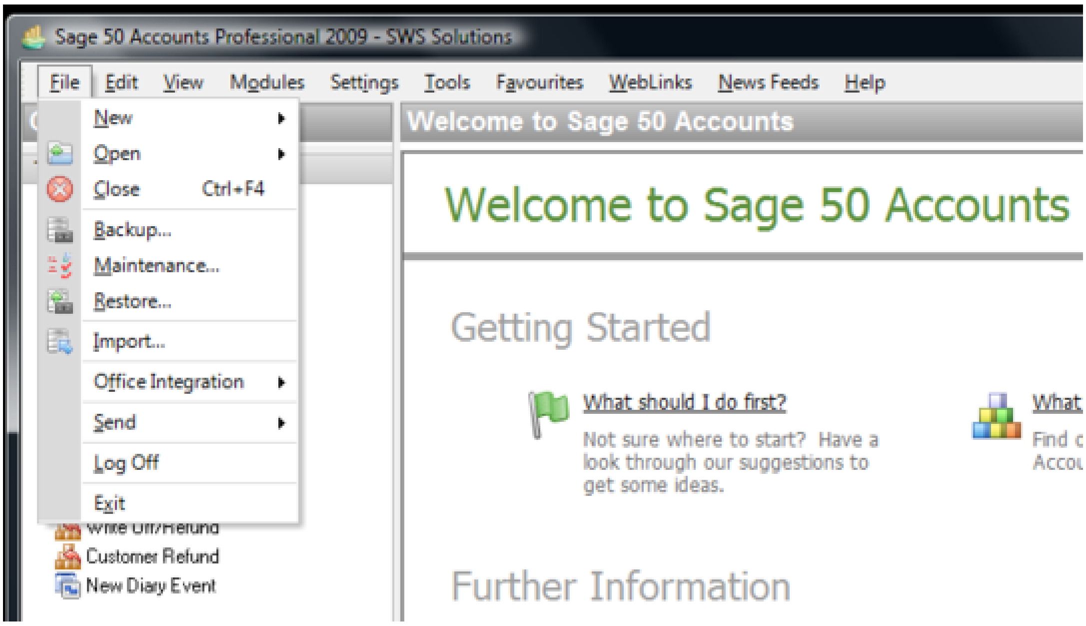
Run export to current date end - This will locate ALL documents which have been invoiced but not yet exported and export them to sage compatible files, if however you have configured the export to only include fully paid documents then unpaid documents will not be exported

Run Export to Month End - This allows you to perform the export mid month, but keep sage clear of the current months documents.

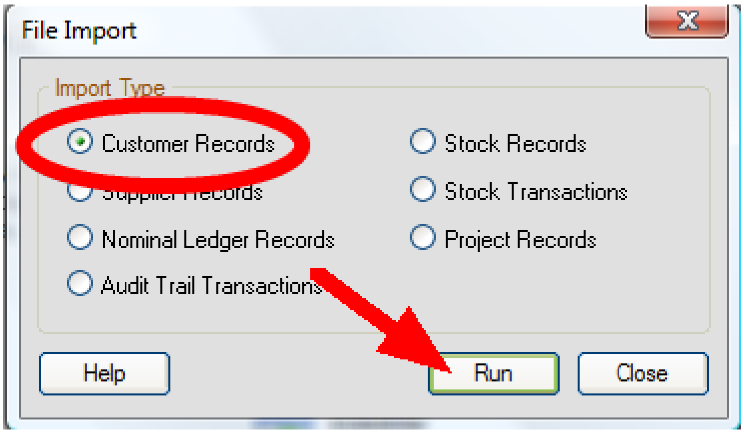
View Previous Export Data - This allows you view and re-export data which has previously been exported.

Once you have run the export, each invoice or payment will be marked as posted to sage (as applicable) this happens automatically.

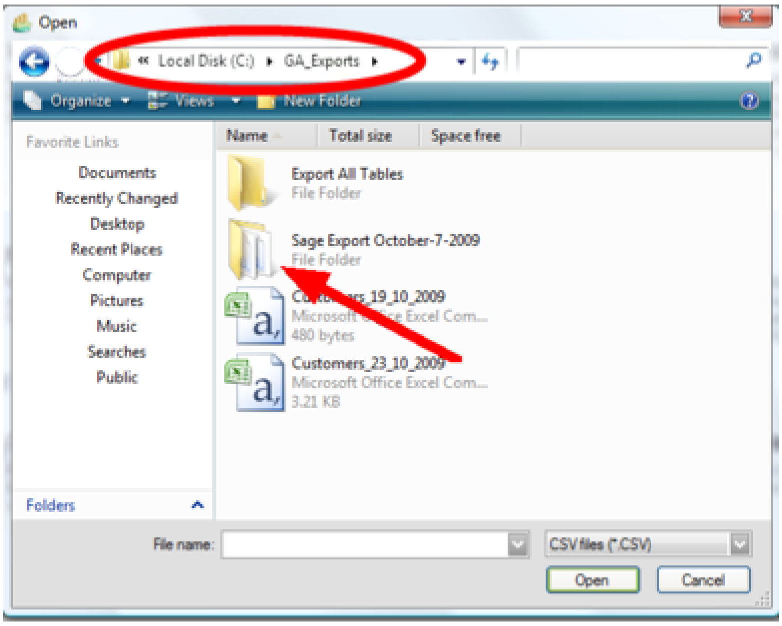
Next to import into Sage, you would open Sage and perform a backup in sage



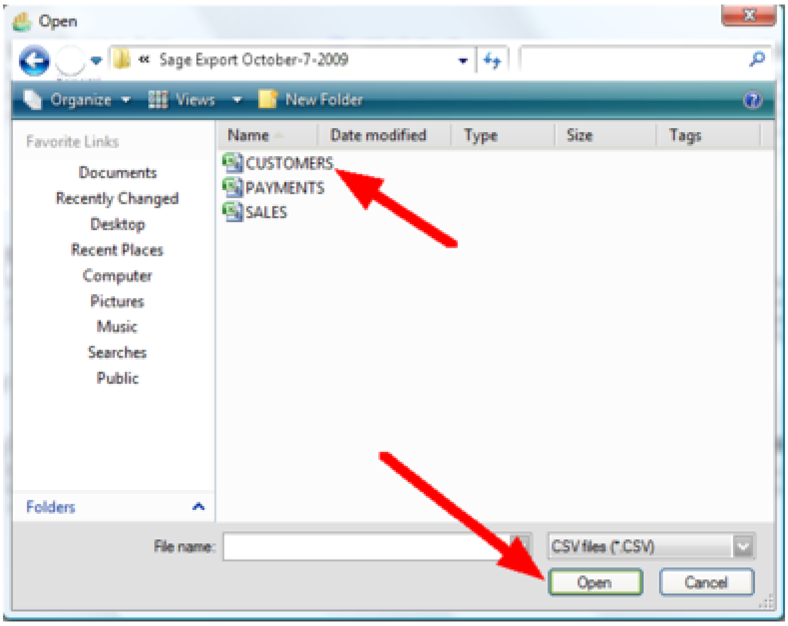
You would then go to File > Import and ensure Customer Records is selected, followed by clicking Run



You will then be asked to locate the file for import, using the navigation in the window, browse to Local Disk C: and select the folder named GA_Exports

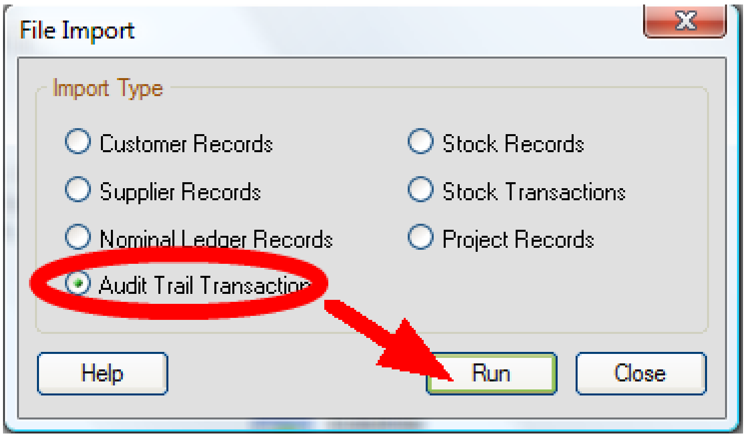


When in this folder, you will see various Sage Export {Date} folders, ensure you choose the corresponding folder by double clicking.



Now select the file named CUSTOMERS and choose open. Sage will now import the file.

Repeat this process for both Payments and Sales as required, however this time you MUST choose **Audit Trail Transactions** instead of customers



Two major things to be aware of is :

If when running the import in sage you are presented with an error or warnings dialogue, this does not always mean the data was not imported ! Take a moment to check your sage records before re-attempting an import.

It is difficult to delete anything from sage, so to prevent issues arising ensure you perform a backup in sage before running any import.

TIP	**Running the import on the same files more than once will cause DUPLICATES in Sage** We cannot support any issues directly related to SAGE, whilst every effort is made to ensure the data transfer will run without problems we urge you to check and ensure the transfer was successful and accurate along with keeping regular backups of SAGE incase of problems.

GA2 has been tested with Sage for Dos, Sage Instant Accounts 12, Sage Line 50 financial Controller.

3.10.2 Exporting to Sage 2010 V16

Garage Assistant has a module to export to sage, full instructions are also shown on the sage export screen.

When you export to sage, there will be 3 files created you can change the names of these, however they default to :

- Customers.csv
- Sales.csv
- Payments.csv

The files will be saved into a folder on your hard drive called GA_EXPORTS

Each export will only export records which have not previously been posted to sage, this is to prevent possible duplicates.

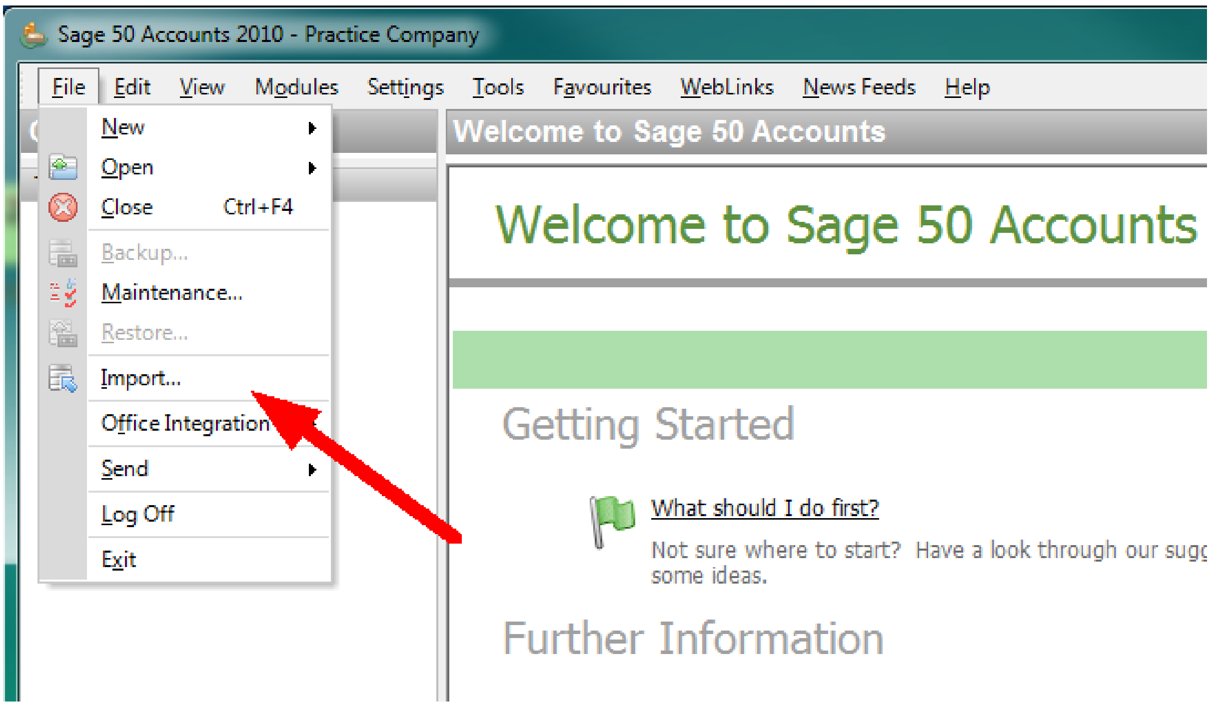
Run export to current date end - This will locate ALL documents which have been invoiced but not yet exported and export them to sage compatible files, if however you have configured the export to only include fully paid documents then unpaid documents will not be exported

Run Export to Month End - This allows you to perform the export mid month, but keep sage clear of the current months documents.

View Previous Export Data - This allows you view and re-export data which has previously been exported.

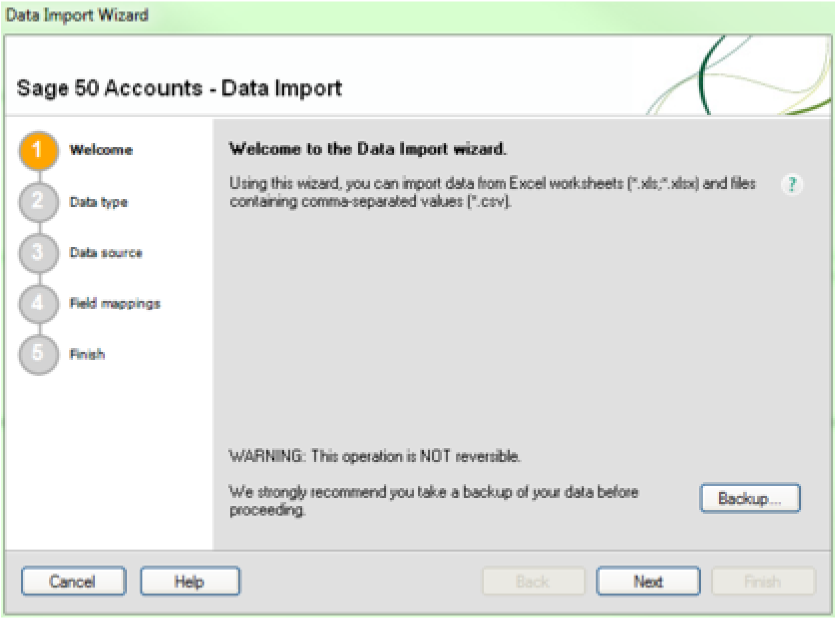
Once you have run the export, each invoice or payment will be marked as posted to sage (as applicable) this happens automatically.

1. Next to import into Sage, you would open Sage and perform a backup in sage

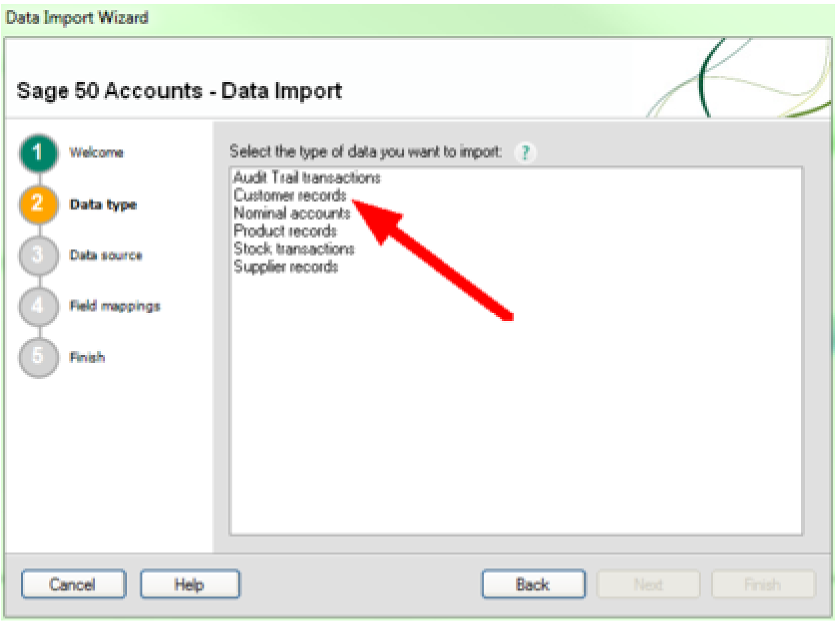


2. First you would need to go to File and choose Import

3. This will present you with the Sage Data Import Wizard as shown below, click on next to choose the data type



4. You will then be asked to choose the data type for importing. First you would choose Customer Records, followed by clicking Next



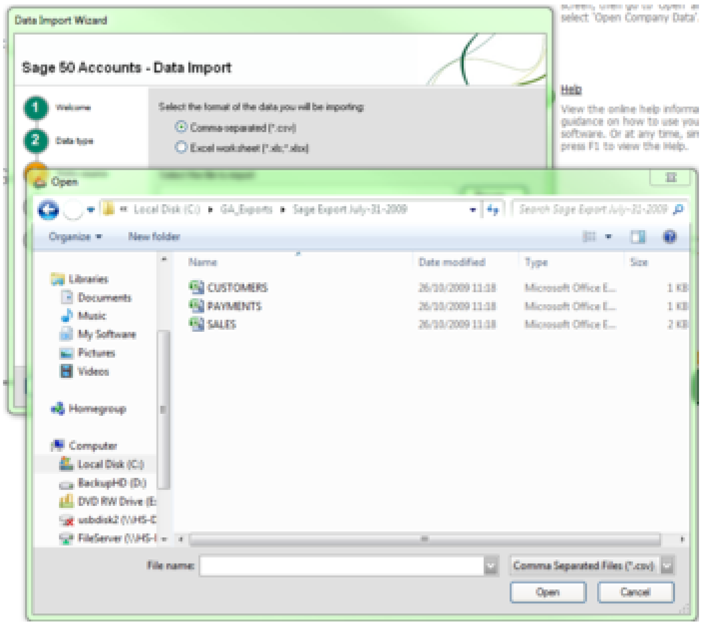
5. Next you will asked the format of file and also to select the file for import,

- **Choose Comma-separated (*.csv)**
- **Leave the box labelled "First row contains headings" as not ticked**

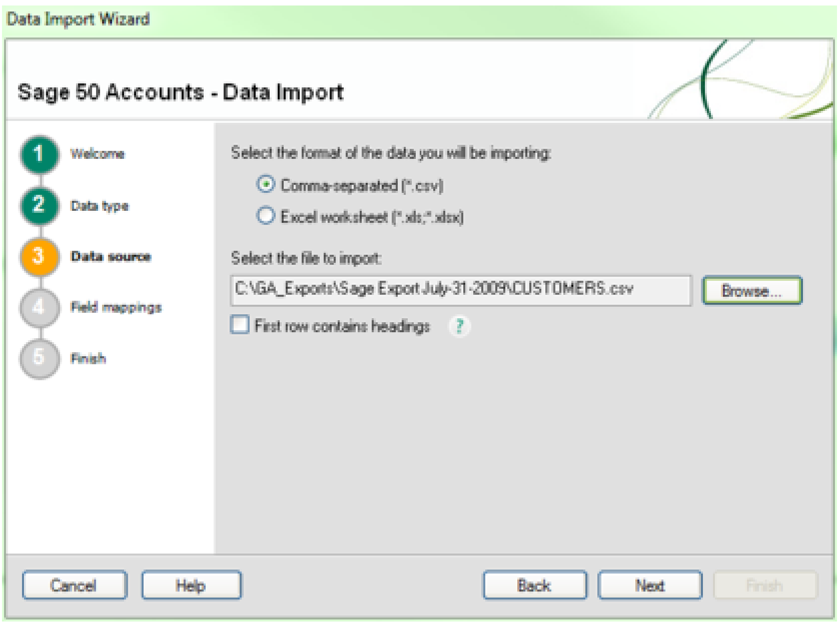
6. Then click on browse to locate the Customers.csv file created by GA2
In the Open window, you will need to locate

- My Computer
- Local Disk C:
- GA_Exports
- The correct dated Sage Export folder

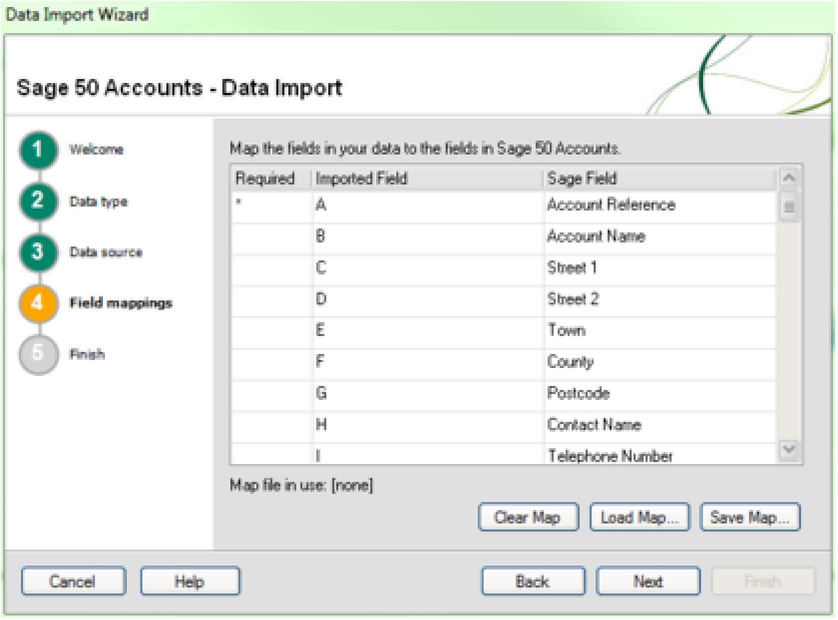
This will present a list of files as shown below



7. Now select the file named CUSTOMERS and choose open.

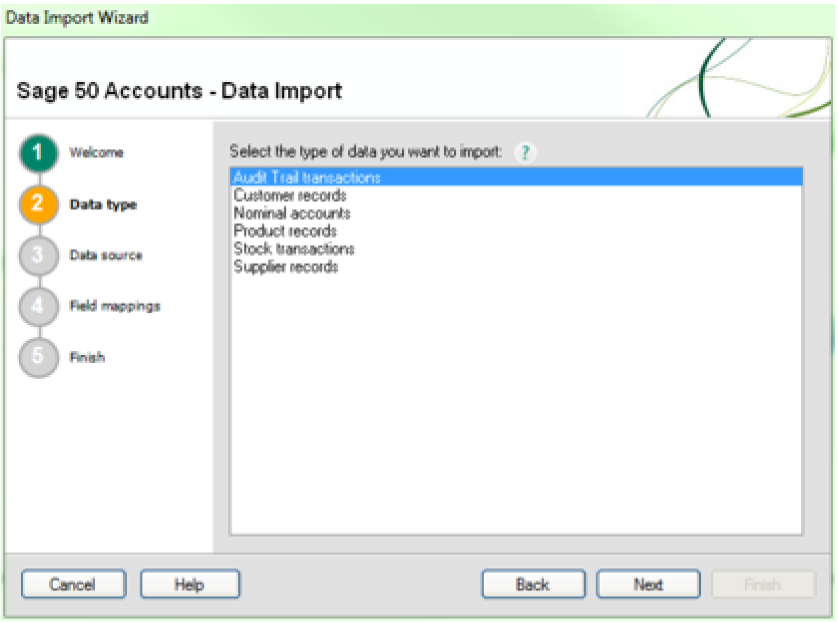


8. You will now be asked to map the fields in your data to the fields in Sage
Proceed to set in order, each field from A to I as shown in the screenshot below

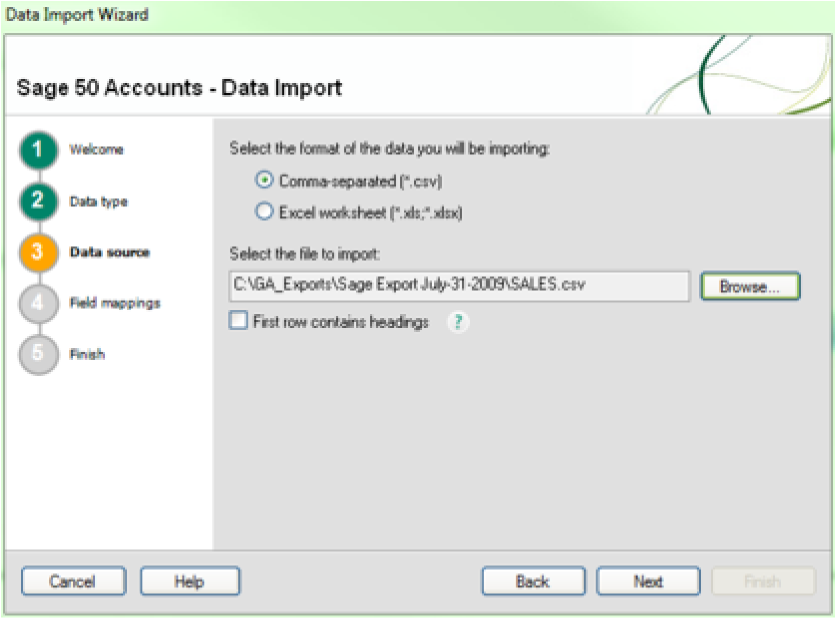


9. Click on Next, followed by Finish, Sage will now import the customers file.

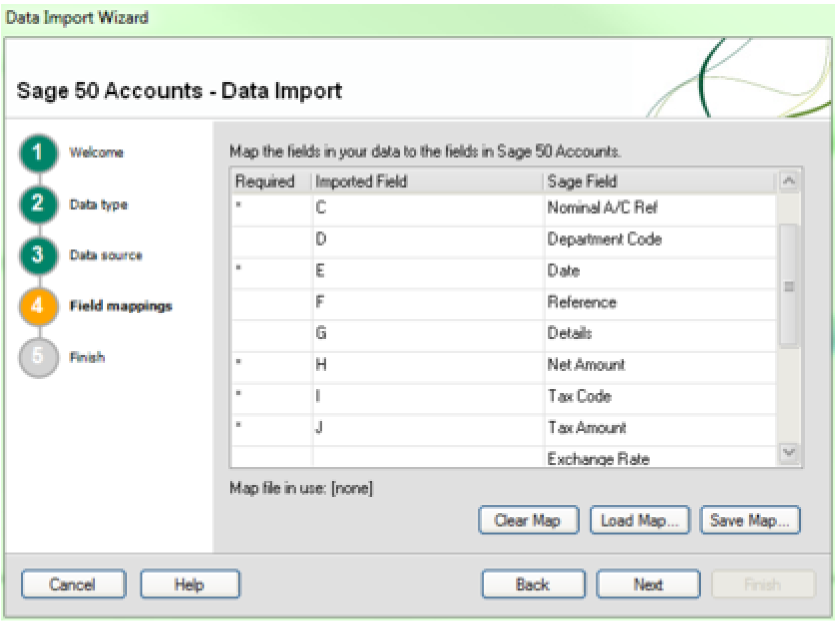
10. Next you will need to select import again, this time choosing Audit Trail transactions as the data type



11. Repeat this process for both Payments and Sales as required,
However this time you MUST choose **Audit Trail Transactions** instead of customers using the same options, Comma-separated and leaving the box un-ticked



12. You will now be asked to map the fields in your data to the fields in Sage
Proceed to set in order, each field from A to J as shown in the screenshot below, all other fields after J (Tax Amount) remain empty



13. Finally click on Next, followed by finish to import the data

14. Repeat steps 10 to 13 for the payments file.

> **For the customers file, you should only map fields A to I** (Telephone number being the last field)
> **For Sales & Payments map fields A to J** (Tax Amount being the last field)

Two major things to be aware of is :

If when running the import in sage you are presented with an error or warnings dialogue, this does not always mean the data was not imported ! Take a moment to check your sage records before re-attempting an import.

It is difficult to delete anything from sage, so to prevent issues arising ensure you perform a backup in sage before running any import.

TIP

Running the import on the same files more than once will cause DUPLICATES in Sage

We cannot support any issues directly related to SAGE, whilst every effort is made to ensure the data transfer will run without problems we urge you to check and ensure the transfer was successful and accurate along with keeping regular backups of SAGE incase of problems.

GA2 has been tested with Sage for Dos, Sage Instant Accounts 12, Sage Line 50 financial Controller.

4 Backups and Data Files

4.1 Backing up GA2 Data

Performing a backup is the single most important task you should ever do in Garage Assistant, for this purpose we have designed Garage Assistant to prompt you after daily after 4pm to do a backup if you have not yet done so.

If you have not backed up and for any reason loose your data, we will not be able to help. If you have backed up the worst that could happen is you would loose a days work, now that's a lot better than 1 years worth !

There's a few ways to perform a backup, all of which perform the same task, the easiest and most accessible is on the log in screen.

Alternatively you can go into the Admin Area, choose Perform a system Backup.

All backup files are saved to your local hard disk accessible through

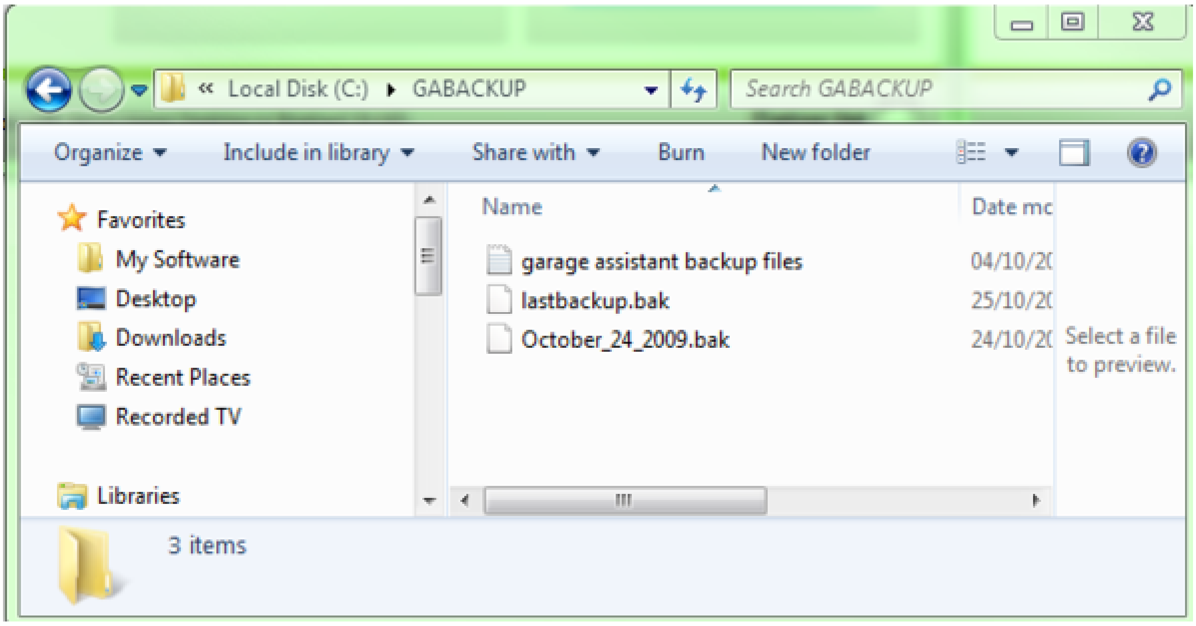
Start > My Computer > Local Disk C: > GABACKUP
Or the folder path is : C:\GABACKUP

You can change this setting to backup to an external drive or you can also perform custom backups

The main backup is named lastbackup.bak

Another selection of files you will find are named in a dated sequence such as :
October_24_2009.bak

These are archived backup files, we highly recommend you periodically transfer these to either CD-Rom or another hard disk, you can safely delete old dated archive backups from your hard disk however we recommend leaving the last weeks worth on your machine.



You can also use the Backup File Maintenance in GA2 to remove excess backup files after a certain period, this requires you to go into

1. Admin
2. Backup File Maintenance

An files which are older than the specified number of days (set by changing Keep up to XX Days worth) will be highlighted in red and can be deleted by clicking the clean up button, this will remove all files highlighted in red.

4.2 Restoring from a Backup File

If you ever needed to restore a backup you can select Restore from Custom or Restore from Last Backup, to locate these first you would need to go to

1. Admin
2. Backup & Restore Menu

If you choose restore from last backup file, GA2 will import from the file named lastbackup.bak stored in your GABACKUP folder

If you choose to restore from custom, you will then be asked to select your backup file.

On both occasions you will be asked to enter the word 'import' in to the box to ensure this is the action you want to take.

Please take care, as each restore will update all records in your system with those currently stored in the backup file, for instance
If you issued invoice 100 then restored from an earlier backup, Invoice 100 would need to be issued again.

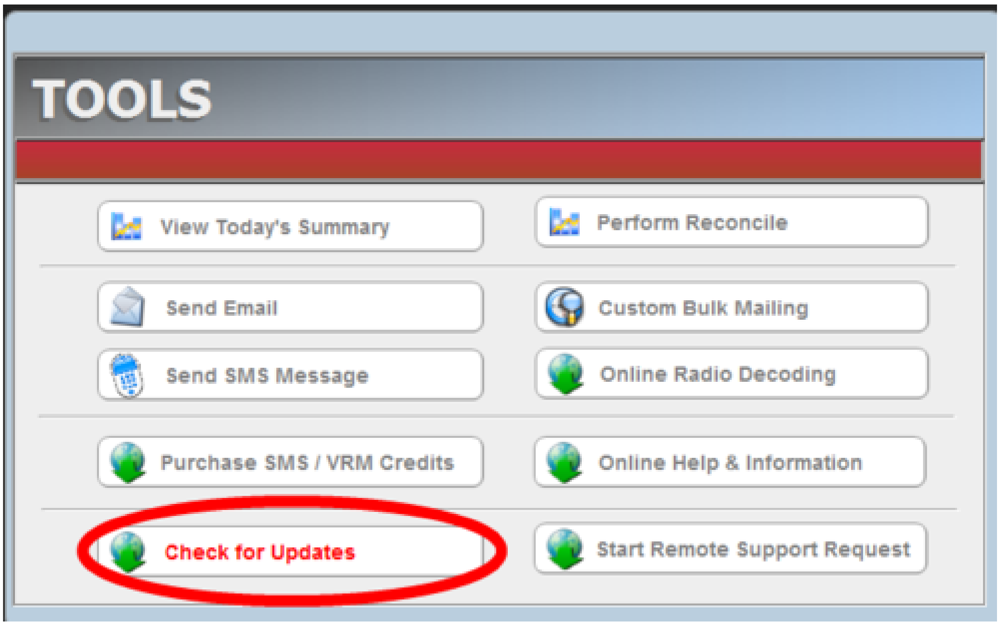
If in doubt first perform a custom backup to a location on your PC such as the desktop to ensure you can roll back if needed.

4.3 Updating GA2

We regularly release updates for Garage Assistant Online

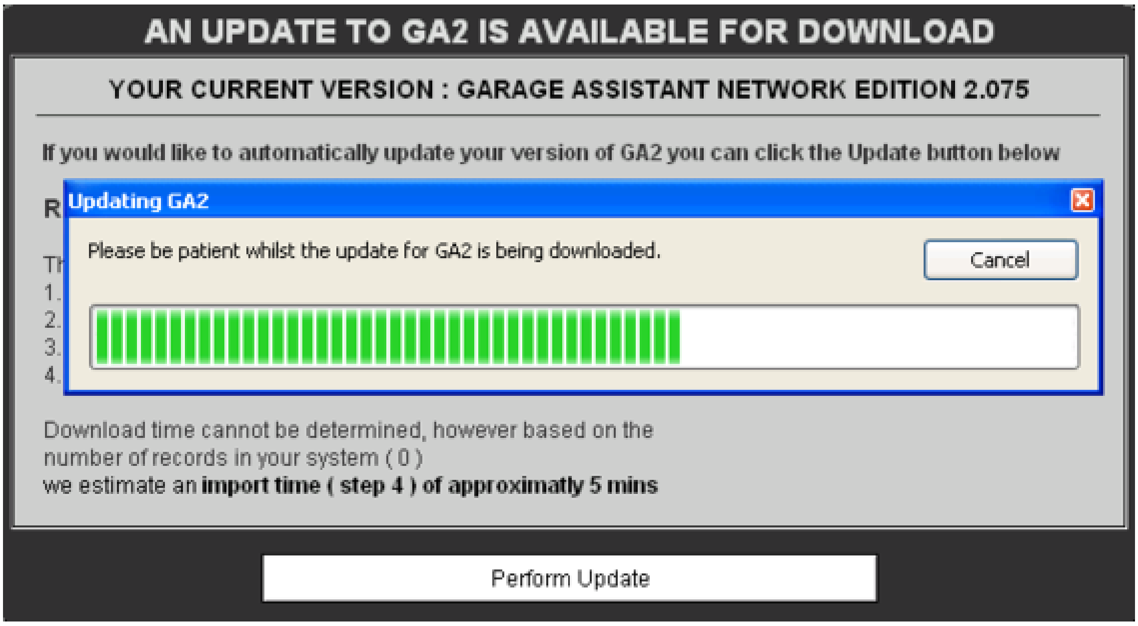
Updating is quite straight forward but essential that you follow these steps.

Go to Tools, then click on check for updates, you will be notified if an update is available and what version.



If an Update is available simply clicking the download or perform update button will perform all the necessary steps
including :

- Perform a backup of your system
- Download the updated files
- Close down GA2 and install the updated files
- Import your data from the backup created



The entire update process is automated, however depending on the number of records in your system can take some time.

If during the backup, or download process something goes wrong, the update will abort

and display an appropriate message.

4.4 Transferring Data to another PC

Transferring data between two PC's is quite straight forward in GA2 especially if you use the custom backup and custom restore options.

Perform a backup to PC, copy the backup file lastbackup.bak or if you performed a custom backup, then copy that file from your main PC to your secondary PC

Next go into the Admin and choose Backup & Restore Menu followed by restore from custom. Choose the file you copied over and GA2 will import from this.

For instance : You can perform a custom backup directly onto a USB memory stick, choosing the name yourself

Plug the USB stick into your second PC, then from GA2's admin choose custom restore.
Browse to your USB stick and click on the file you saved above.

If you plan to work on the second PC you MUST NOT also work on the first PC as the data on the first PC will be over-written when you re-import it at a later date.

4.5 File Recovery - Single User

Depending on circumstance, computer data can become corrupt, if you system suffers a power failure or severe crash you may be presented with the following message when trying to open the system

The file mainmenu is damaged and cannot be opened, please use the recover command.
This is NOT a common occurrence, however under these circumstances we ask you first attempt the following.

1. Make note of the damaged filename (mainmenu.sws)
2. Hold down the CTRL & SHIFT keys on your keyboard whilst double clicking the program icon on your desktop

3. An open damaged file window will appear. You must now browse to the program folder and select the damaged file for example :
click > My Computer (to the left in the Open Damaged File Dialogue)
double click > Local Disk (C)
double click > Garage Assistant V2

4. Then locate the filename mainmenu or mainmenu.sws and click open.

The file recovery will begin automatically and save the original file as mainmenu_recovered.
sws
Please note, this is the original file, the repaired file will be mainmenu.sws

Recover is now complete.

4.6 File Recovery - Network Edition

Depending on circumstance, computer data can become corrupt, if you system suffers a power failure or severe crash you may be presented with the following message when trying to open the system

The file mainmenu is damaged and cannot be opened, please use the recover command.

This is NOT a common occurrence, however under these circumstances we ask you first attempt the following.

1. Make note of the damaged filename (mainmenu.fp7)
2. Click 'Start'
3. Double Click 'My Computer'
4. Double Click 'Local Disk C:'
5. Double Click 'Garage Assistant Server'
6. Locate and double click 'Filemaker Pro'
7. Once Filemaker pro has loaded, Click 'File'
8. Choose 'Recover'

9. An open damaged file window will appear. You must now browse to the program folder and select the damaged file for example :
click > My Computer (to the left in the Open Damaged File Dialogue)
double click > Local Disk (C)
double click > Garage Assistant V2

10. Then locate the filename mainmenu or mainmenu.fp7 and click open.
You will then be asked to provide the name to save the new file such as mainmenu_Recovered.fp7

11. Leave this as it is and choose Save.
12. Wait a few minutes until the recovery is complete.

13. Go Back to the Garage Assistant Server Folder (steps 1 to 5)

14. Locate mainmenu.fp7 or mainmenu
14a. Right click mainmenu.fp7 and choose rename
14b. Rename to broken_mainmenu.fp7 or similar
15. Locate mainmenu_Recovered.fp7 or mainmenu_Recovered
15a. Right click mainmenu_Recovered.fp7 and choose rename
15b. Rename to just mainmenu.fp7 (or just mainmenu if you could not see the .fp7 originally)

Recover is now complete.

5 Frequent Questions Section

5.1 Activation code does not work

Please ensure that when entering your activation code, the company name you supplied us matches the company name you are entering on the activation screen.

Also please ensure that you are entering any 0's as the number zero and not the letter O

Our activation system ignores spacing and none alphabetic characters such as & - or ' so these will not affect your activation.

For example :

ABC Autos & ABC-Auto's will be ok whereas

ABC Autos Ltd will require that you contact us for a replacement code.

5.2 Address or VAT number not on an invoice

The address entered into the setup wizard is only used to generate your letter head for Landscape Documents

Please edit the details in "Headers / Footers & Logos" to ensure they are as required

5.3 Invoice figures do not add up

GA2 performs its calculations on an invoice line level and not on the overall invoice totals. We chose this method as almost every accounting package on the market also uses this method, such as Sage Line of products, Quickbooks and more.

The main difference is noticeable if you are comparing the VAT calculation by performing the following Sub-Total X 1.175

This may not always add up to the VAT total shown in GA2 due to rounding. However GA2 is correct.
An example of this would be :

Line 1 - qty 1 X 35.00 + vat
Line 2 - qty 1 X 45.00 + vat
Sub Total = 80.00
VAT = 14.01
Total Due = 94.01

You would assume that 80.00 + vat gives a total of £94.00 but due to them being listed as separate items, the vat per item is calculated then rounded and then added together, this gives the same results as if you where to invoice each line as a single invoice.

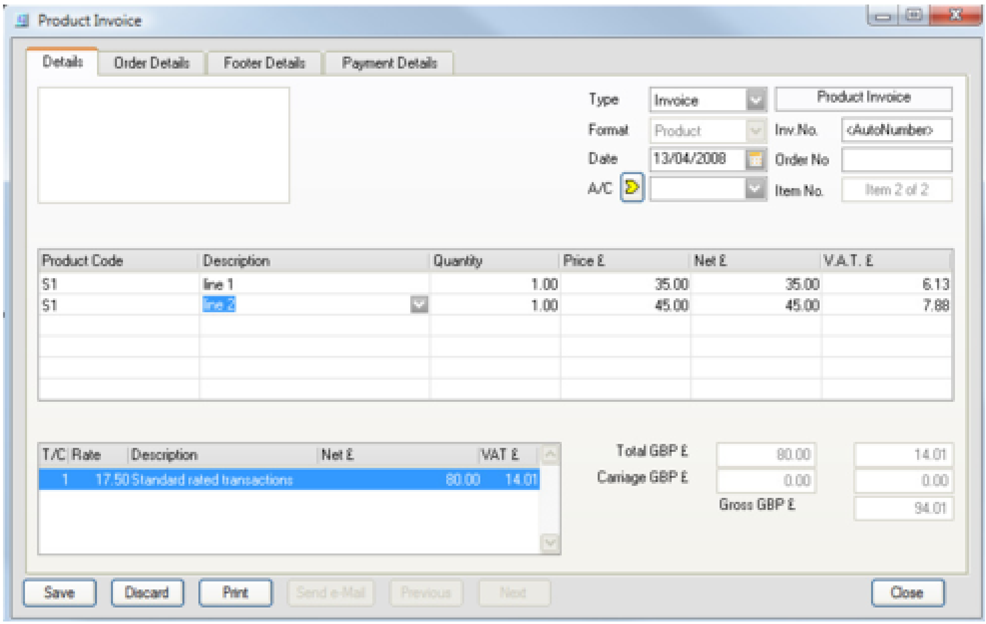
The following will explain as simple as possible as to why this is the case... Lets take a closer look...

Line 1 : 35.00 + vat
Vat : 6.125 (rounded = 6.13)
Total : 41.125 (rounded = 41.13)

Line 2 : 45.00 + vat
Vat : 7.875 (rounded = 7.88)
Total : 52.875 (rounded = 52.88)

Therefore the totals are :
Sub Total : 35.00 + 45.00 = 85.00
Vat : 6.13 + 7.88 = 14.01
Total = 41.13 + 52.88 = 94.01

Below is a Screenshot from Sage Instant Accounts 12 As you can see, the total is also 94.01 as it is within GA2 and the VAT figure is 14.01



Hopefully this will help you to understand how the calculations work in GA2 and how they are indeed accurate for the type of invoicing being performed.

5.4 Changing prices in setup does not work

When you change prices for MOT's or even the VAT rate, any existing invoices will not be affected.

This is to ensure consistency of your documents when price changes occur.

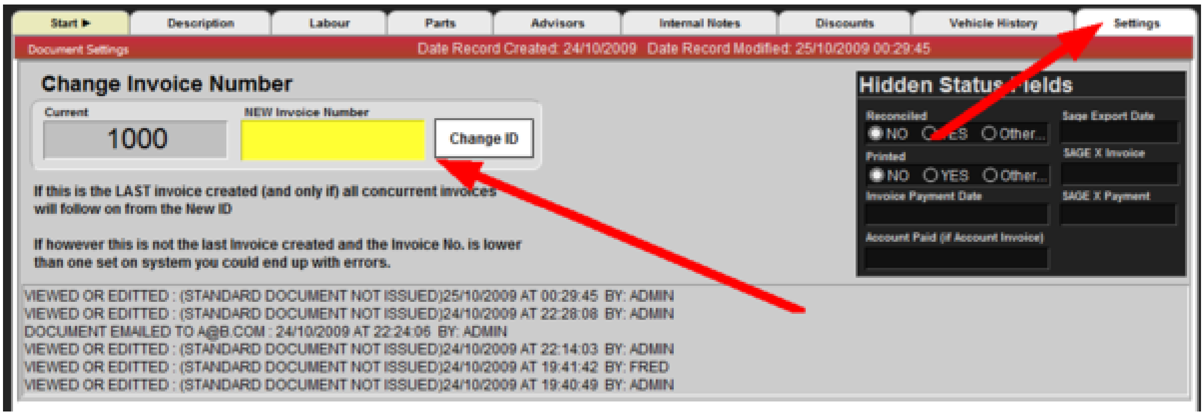
You must create a new document for it to allow the new prices to be used.

If you are running GA2 over a network, after changing anything in the setup wizard you may need to close and re-open GA2 Server Edition.

5.5 How can I change an invoice number

Garage Assistant allows you to change invoice numbers to fill in any blanks or if an error has been made.
To do this, you must first create an invoice or edit and existing one.

On the invoice screen, select the Settings Tab.



There you can enter a new invoice number and apply it to the document.

If you enter a higher number than your last invoice, any new invoices created will follow on from the highest number automatically.

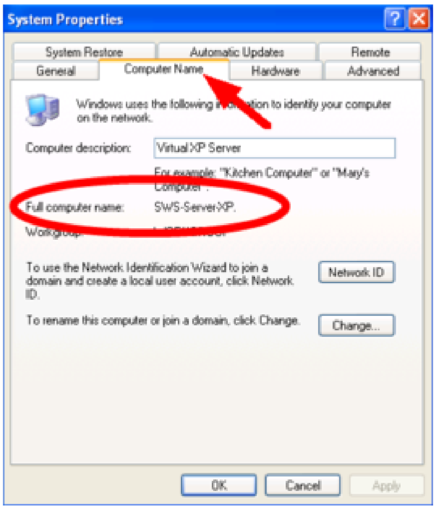
5.6 Connecting the Client to the Server

To connect to the Server PC you first need to enter either the IP address or the computer name.
The computer name is the preferred option, since the IP address can change, which will cause the client to fail to connect, whereas the computer name will not change.

To locate the Name of the Server PC follow these steps

1. Perform these steps on the PC you installed Garage Assistant Server to
2. Right Click on My Computer (either on your desktop or on the Start Menu)
3. Choose Properties
4. Click Computer Name (if on windows XP)
5. Make a note of the Full Computer Name including any dashes (do not include the full stop at the end)

Below shows this screen on both Windows XP and Windows 7, Windows Vista will also show a similar screen to Windows 7 illustrating where the Full Computer name to use is.

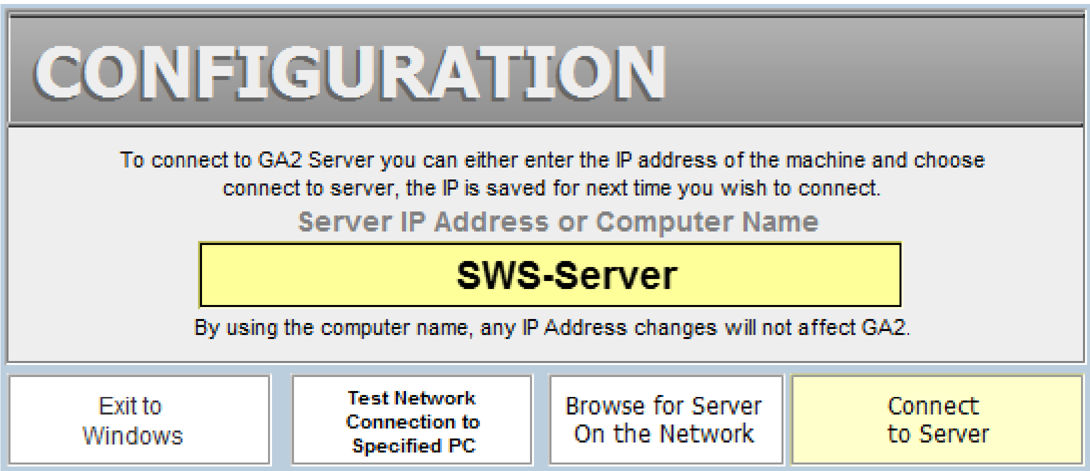


Windows XP Screen showing computer name

Windows 7 Screen showing computer name

Next, on the client machine you will see either the screen directly below, in which case you need to click **"Enter IP Address or Computer Name"**

This will then present the following screen, where you can enter the Computer Name taken from your Server PC



Finally, click on Connect to Server and GA2 should connect taking you to the log in screen.

TIP	If you have recently activated or re-activated after adding additional users, you will need to close the server copy of GA2 and re-open it to initialise changes Failure to do this will cause a message stating there are too many users connected.