

TRAINING MANUAL

TRAINING MANUAL BEFORE USING YOUR GEM-CAR





Basic configuration

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GEM-CAR automotive workshop software is proven to increase sales, improve profitability and save time.

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The most complete and easy-to-master management software for your auto repair shop!

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Compilation of purchase invoices

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Option configuration

Creating a new customer

Registering a new vehicle

Customer information

Customer terms

Vehicle information

Point of sale

Search method

Printing key labels

BASIC CONFIGURATION



FOR ALL CONFIGURATION STEPS

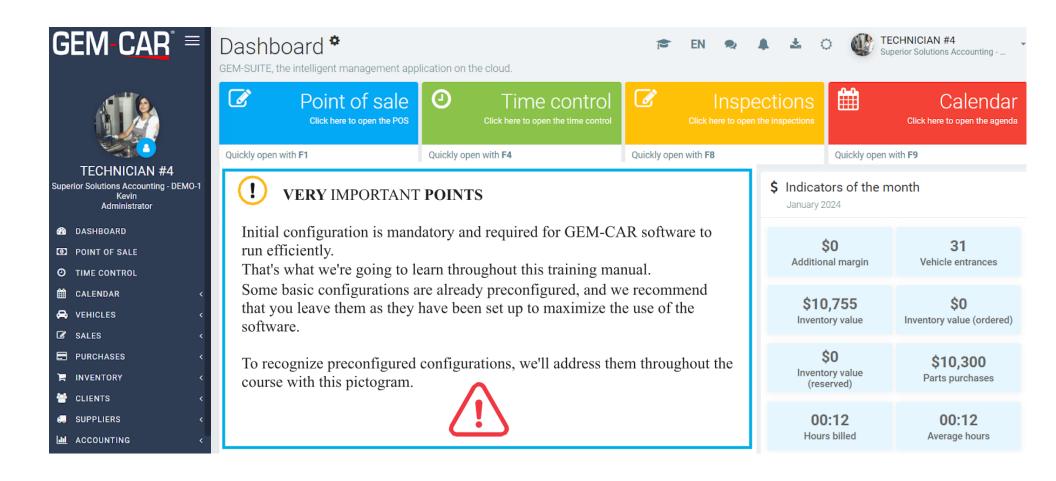
You must complete all the configuration steps described in this manual before using the software.

01

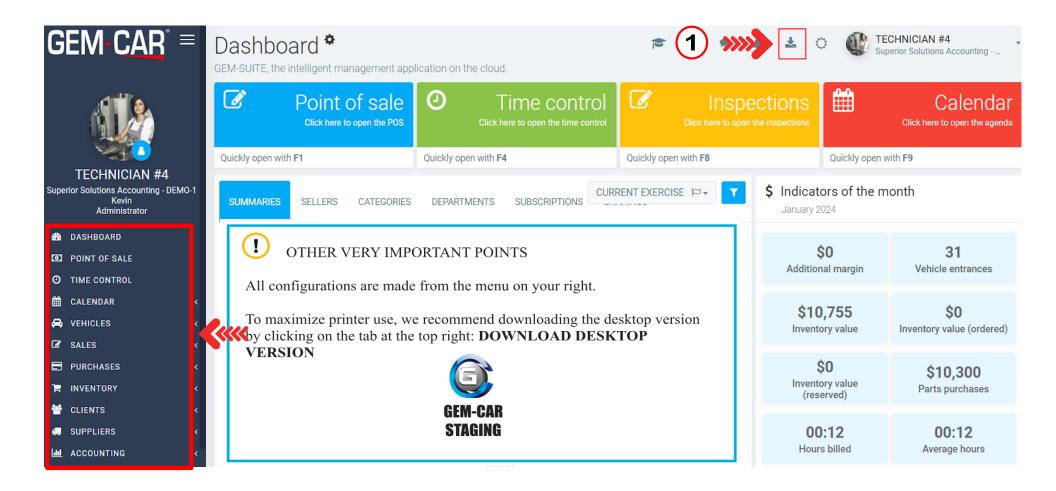
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01.1

BASIC CONFIGURATION



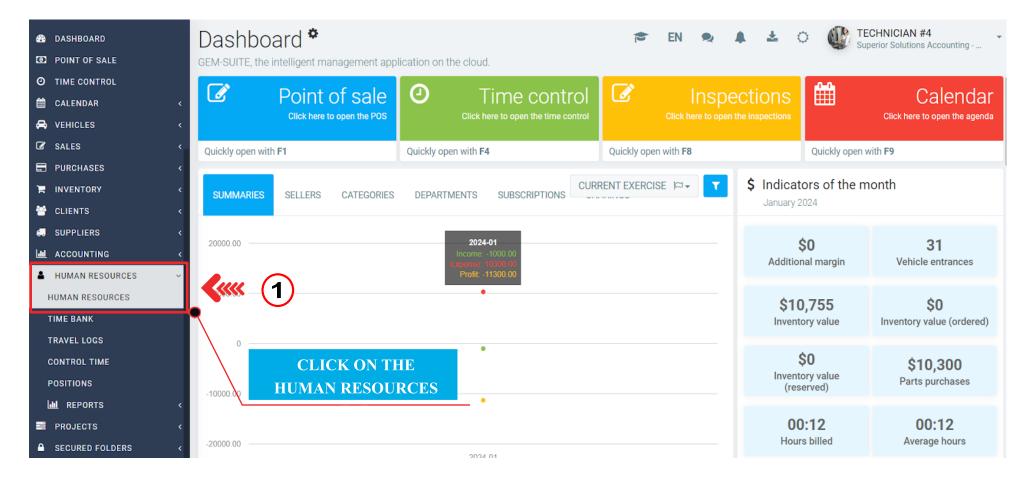
01.2 DOWNLOAD THE DESKTOP VERSION



01.3 HR CONFIGURATION

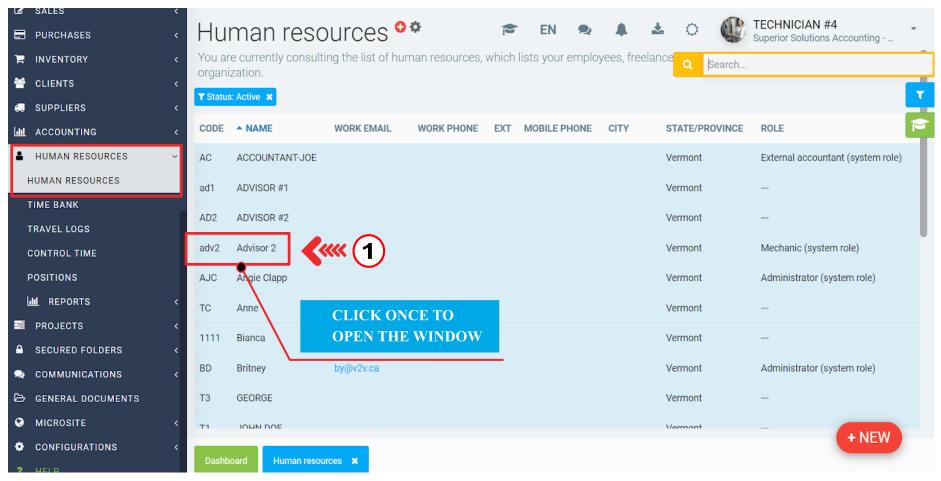
FIRST YOU NEED TO SET UP ALL THE HUMAN RESOURCES.

TO START, CLICK ON THE MENU ON YOUR LEFT AND ON THE HUMAN RESOURCES TAB.



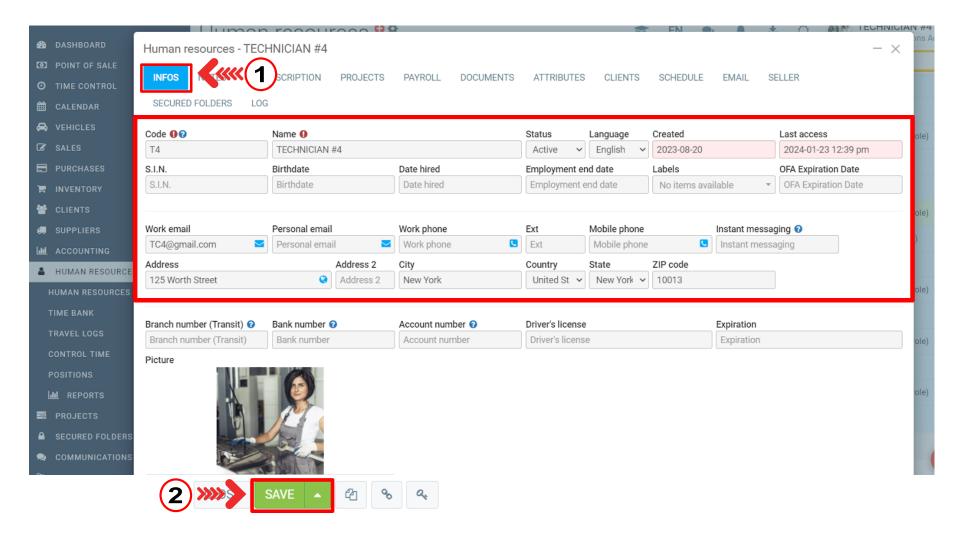
01.4 COMPANY CONFIGURATION

THE FIRST STEP IS TO SET UP THE COMPANY AND ALL ITS EMPLOYEES. CLICK ON THE COMPANY NAME TO OPEN THE WINDOW.



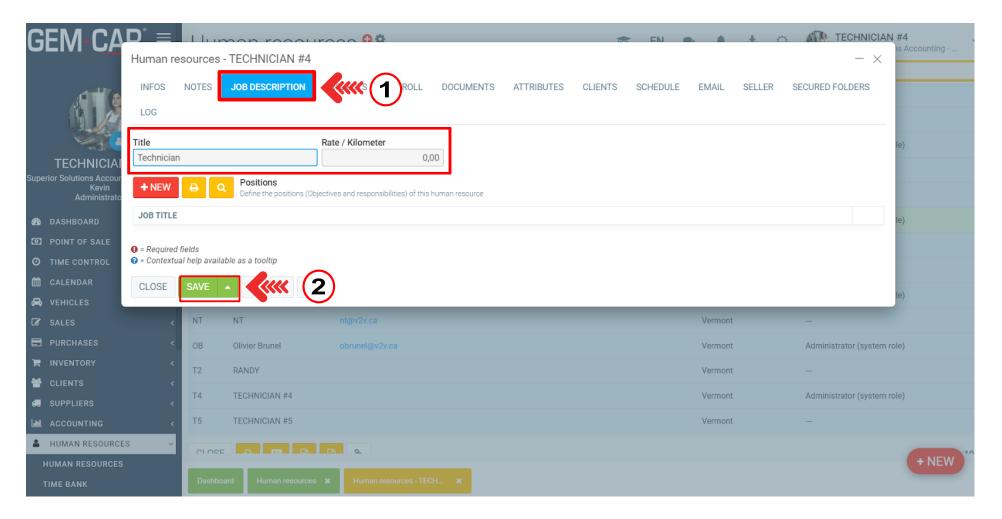
01.5 INFO CONFIGURATION

YOU MUST COMPLETE ALL THE DATA FIELDS IN THE INFO TAB, THEN CLICK ON SAVE.



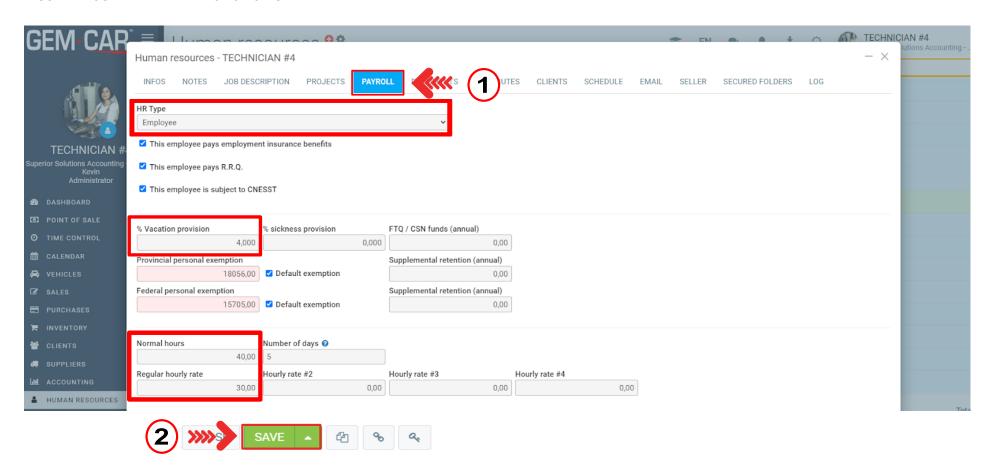
01.6 JOB DESCRIPTION

CLICK ON THE JOB DESCRIPTION TAB AND FILL IN ALL THE DATA FIELDS. THEN CLICK ON SAVE.



01.7 PAY CONFIGURATION

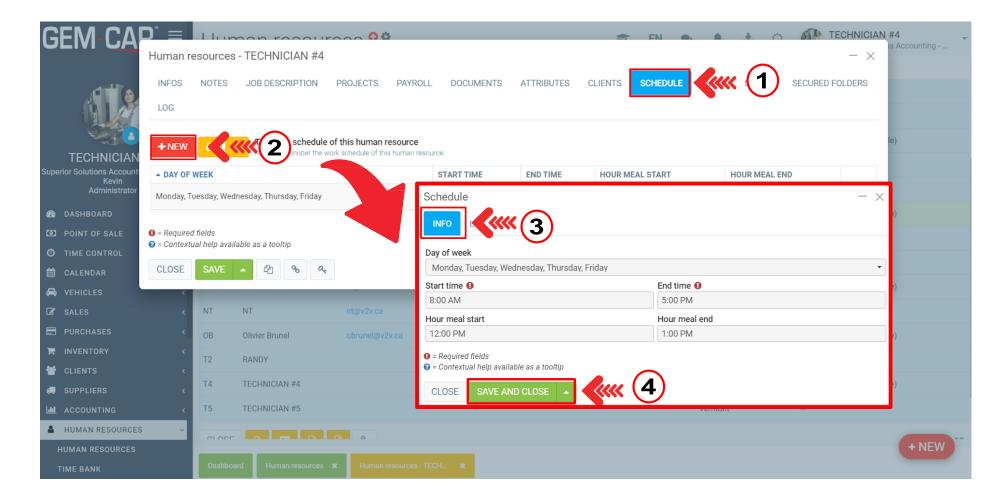
CLICK ON THE PAY TAB AND FILL IN THE DATA FIELDS: TYPE OF HUMAN RESOURCES, % OF VACATION ALLOWANCE, NUMBER OF HOURS PER WEEK AND REGULAR HOURLY RATE. THEN CLICK ON SAVE.



01.8 SCHEDULE CONFIGURATION

THEN CLICK ON NEW.

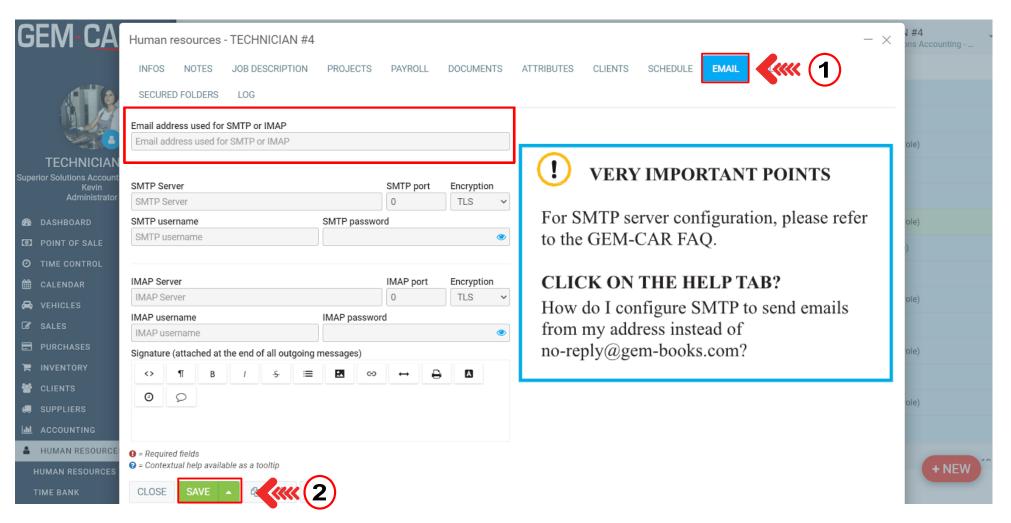
COMPLETE THE DATA FIELDS ON INFO. THEN CLICK ON SAVE.



01.9

MAILBOX CONFIGURATION

CLICK ON THE EMAIL TAB. THEN COMPLETE THE DATA FIELDS. THEN CLICK ON SAVE.



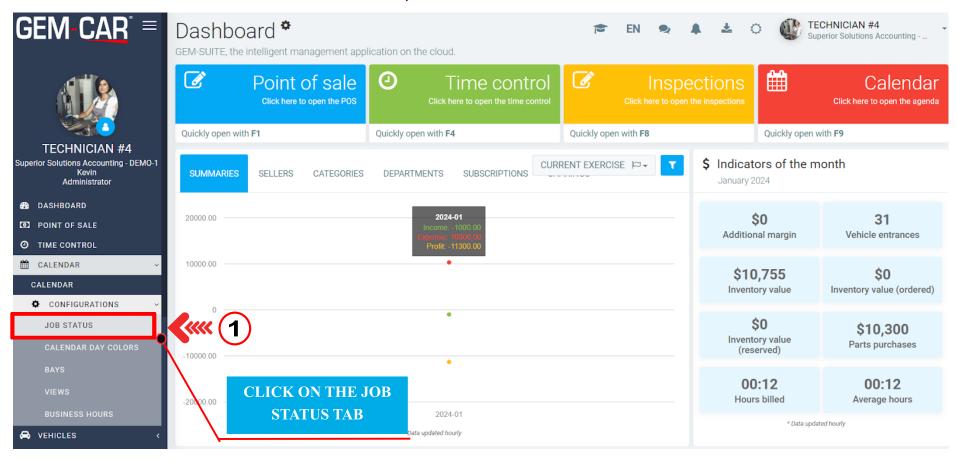
CALENDAR CONFIGURATION

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02.1 CALENDAR CONFIGURATION

YOU NEED TO START BY CONFIGURING ALL THE PARAMETERS.

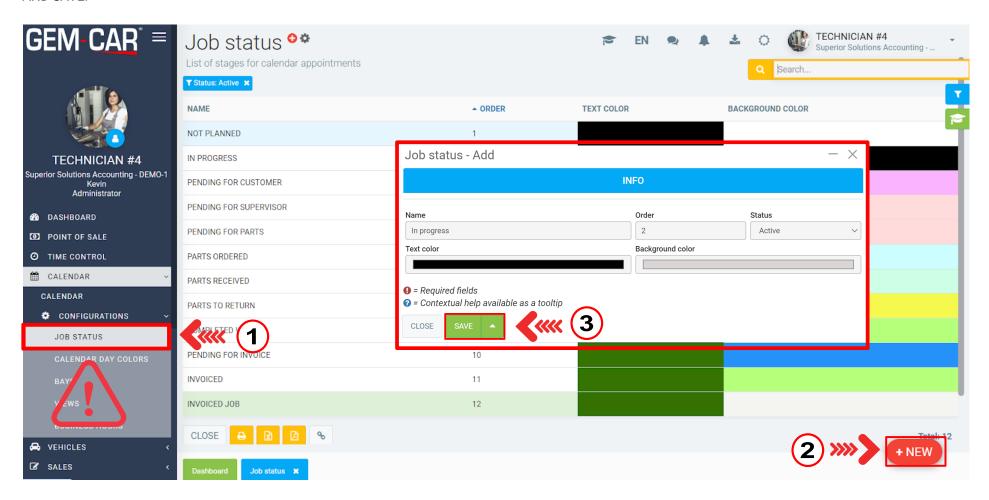
PLEASE CLICK ON THE MENU TO YOUR LEFT ON THE CALENDAR, SETTINGS AND JOB STATUS TAB.



JOB STATUS

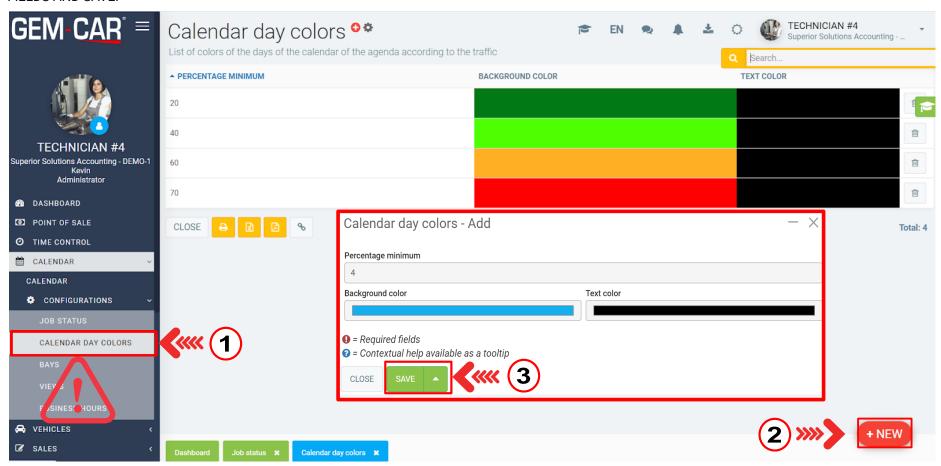
IN JOB CONFIGURATION, ALL STATUSES HAVE BEEN PRE-PROGRAMMED TO MAXIMIZE SOFTWARE USE.

IN THE **JOB STATUS** CONFIGURATION, IF YOU NEED TO MODIFY OR ADD FIELDS, FIRST CLICK ON **NEW.** THEN COMPLETE THE DATA FIELDS AND SAVE.



02.3 CALENDAR COLORS

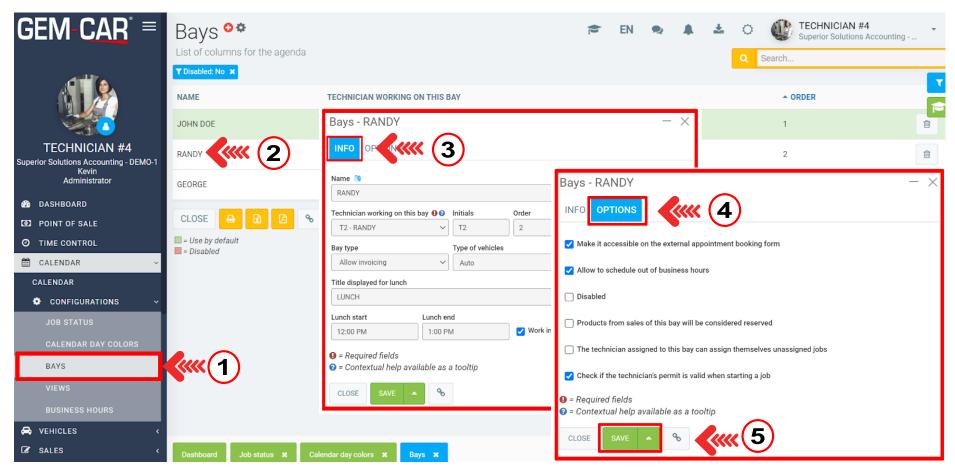
IN THE COLOR CONFIGURATION, ALL STATUSES HAVE BEEN PRE-PROGRAMMED TO MAXIMIZE SOFTWARE USE.
IN THE **CALENDAR COLOR** CONFIGURATION, IF YOU NEED TO MODIFY OR ADD FIELDS, FIRST CLICK ON **NEW**. THEN COMPLETE THE DATA FIELDS AND SAVE.



02.4

WORKBAY CONFIGURATION

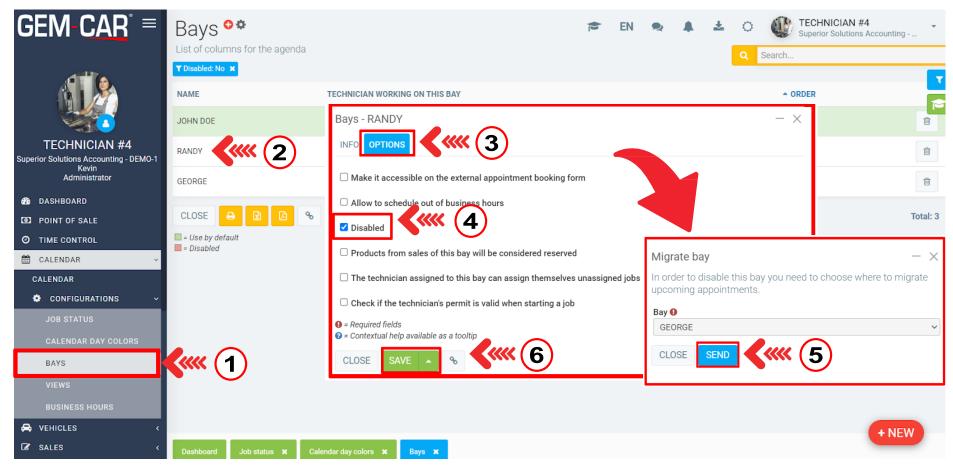
IN THE **WORKBAY** CONFIGURATION, SELECT THE TECHNICIAN. NEXT, AN **INFO** WINDOW WILL OPEN. YOU MUST COMPLETE ALL DATA FIELDS SUCH AS THE TECHNICIAN'S NAME, SALARY COST, LUNCH TITLE, AND LUNCH TIME. THEN CLICK ON **OPTIONS**. TICK THE OPTIONS AS REQUIRED AND **SAVE**.





DEACTIVATE A TECHNICIAN IN THE CALENDAR

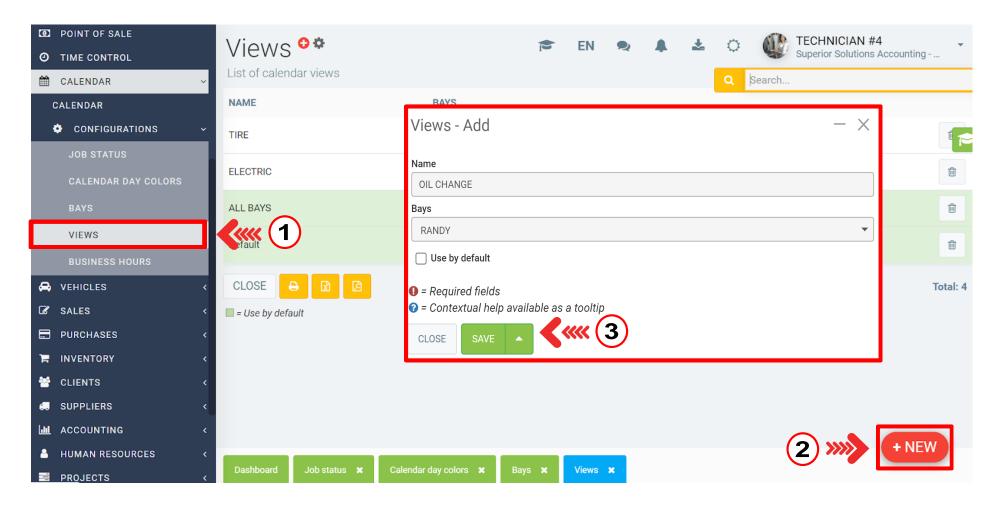
IN THE WORKBAYS CONFIGURATION, YOU MUST SELECT THE TECHNICIAN. THEN, A WINDOW WILL OPEN **INFO**. CLICK ON OPTIONS. THEN TICK THE DISABLED OPTION, A WINDOW WILL APPEAR, AND YOU CLICK ON **SEND** TO ANOTHER TECHNICIAN AND **SAVE**.



02.6

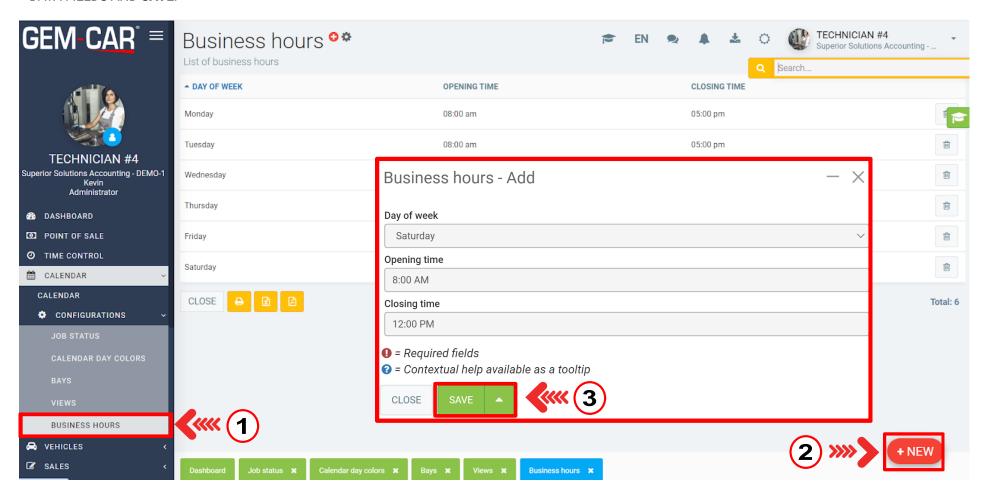
DISPLAY CONFIGURATION

IN THE DISPLAY CONFIGURATION, TO ADD A SPECIALTY SUCH AS TIRE INSTALLATION, CLICK ON **NEW**. THEN COMPLETE THE DATA FIELDS AND **SAVE**.



02.7 BUSINESS HOURS CONFIGURATION

IN THE BUSINESS HOURS CONFIGURATION, IF YOU NEED TO CHANGE A DAY SUCH AS SATURDAY OR OPENING HOURS, CLICK ON NEW. THEN COMPLETE THE DATA FIELDS AND **SAVE**.



VEHICLE CONFIGURATION

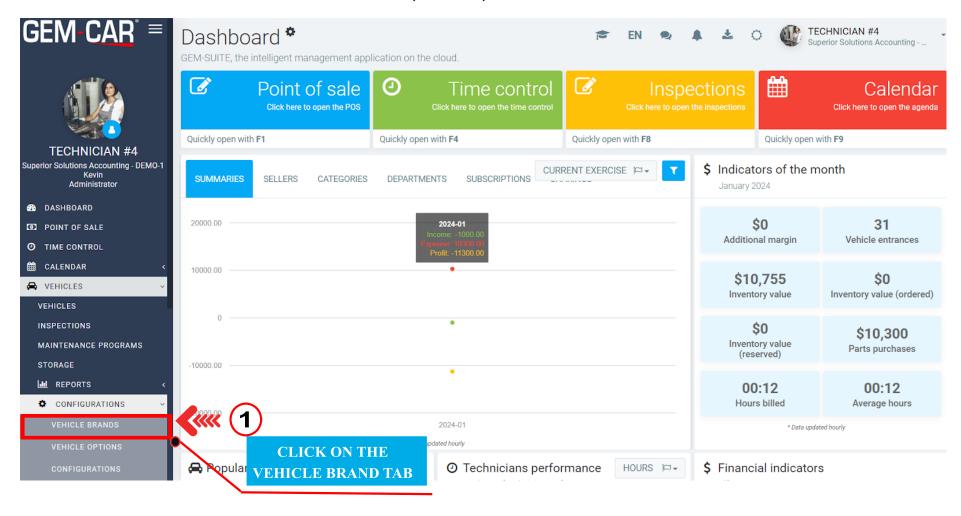
03

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03.1 VEHICLE CONFIGURATION

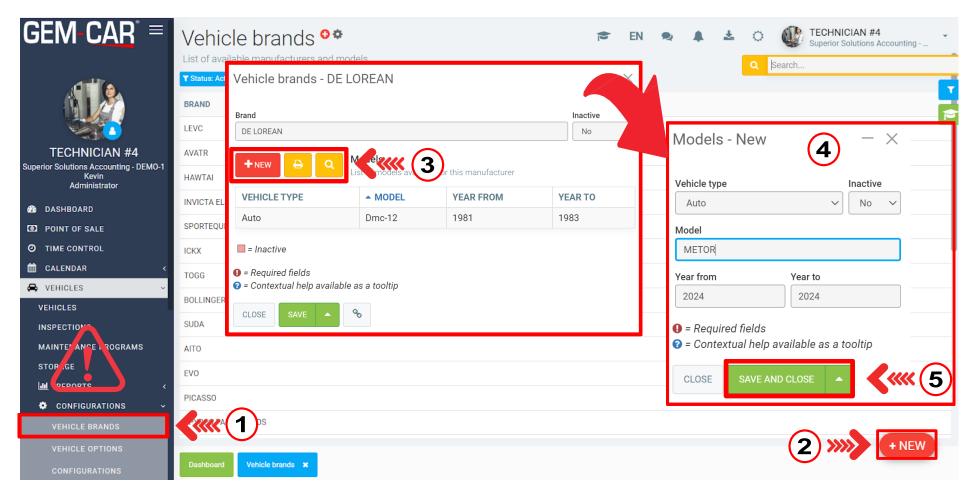
YOU CAN CONFIGURE ALL VEHICLE TYPES.

PLEASE CLICK ON THE MENU TO YOUR LEFT ON THE VEHICLES, SETTINGS, AND VEHICLE BRANDS TAB.



03.2 VEHICLE MAKES AND MODELS

IN **VEHICLE MAKE** CONFIGURATION, MOST HAVE BEEN PRE-PROGRAMMED TO MAXIMIZE SOFTWARE USE. IF YOU NEED TO MODIFY OR ADD VEHICLES, FIRST CLICK ON **NEW.** THEN ENTER THE VEHICLE MAKE. THEN COMPLETE THE **MODEL-NEW** DATA FIELDS AND **SAVE**.

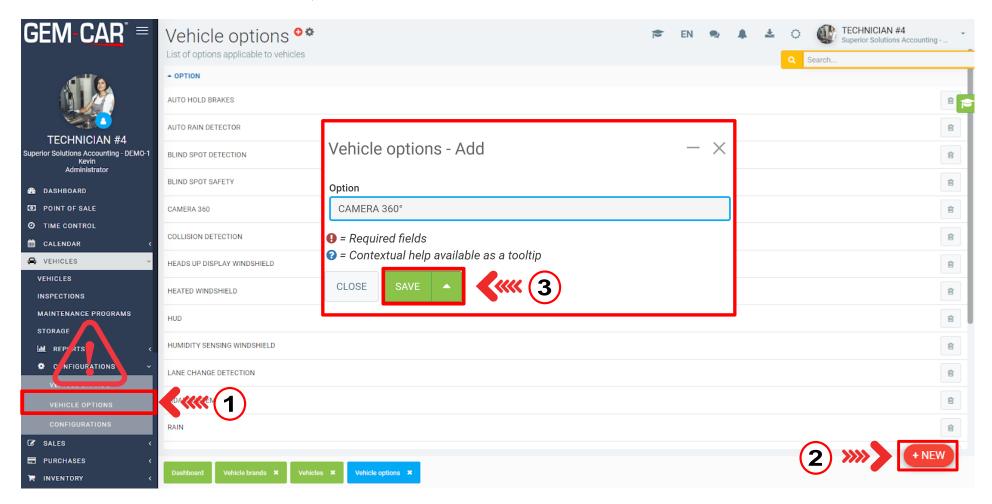


03.3 SETTING OPTIONS

01/08/2023

IN THE **VEHICLE OPTIONS** CONFIGURATION, SOME OPTIONS HAVE BEEN PRE-PROGRAMMED.

IF YOU NEED TO MODIFY OR ADD DATA FIELDS, FIRST CLICK ON **NEW**. THEN COMPLETE THE DATA FIELDS IN **OPTIONS** AND **SAVE**.

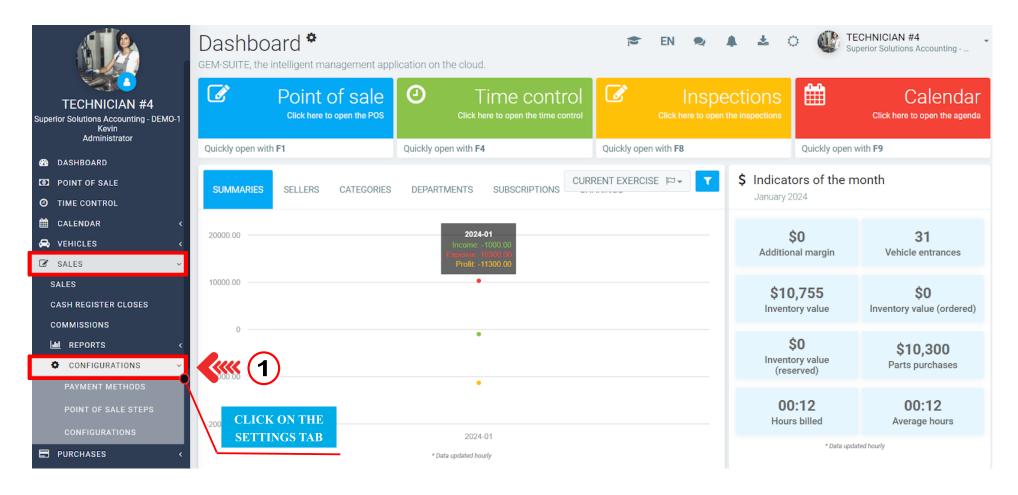


SALES CONFIGURATION

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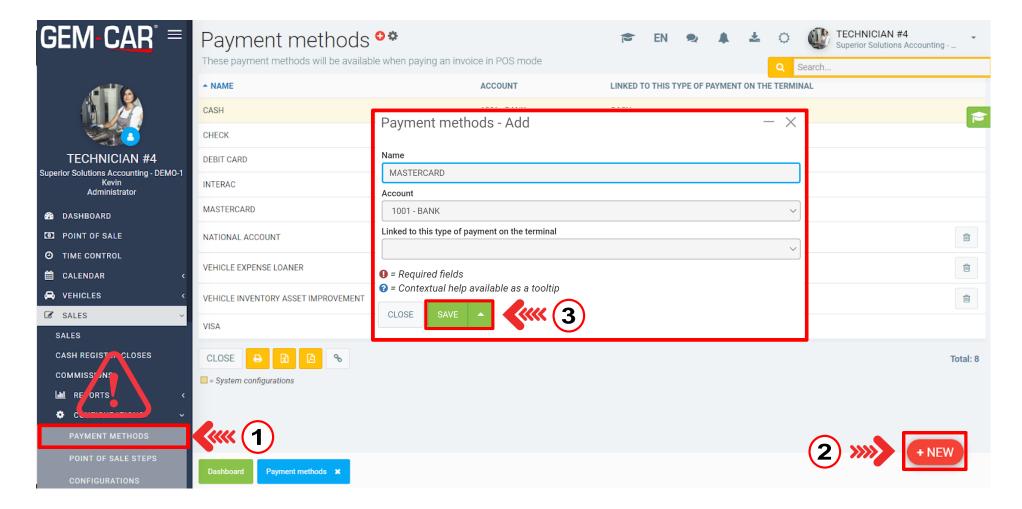
04.1 SALES CONFIGURATION

TO CONFIGURE SALES, YOU NEED TO CLICK ON THE MENU TO YOUR LEFT ON THE SALES TAB AND THEN ON CONFIGURATIONS.



04.2 METHODS OF PAYMENT

MOST **PAYMENT METHODS** HAVE BEEN PRE-PROGRAMMED TO MAXIMIZE THE USE OF THE SOFTWARE. IF YOU NEED TO MODIFY OR ADD PAYMENT METHODS, FIRST CLICK ON **NEW**. THEN ENTER THE PAYMENT.



04.3 POINT OF SALE STEPS

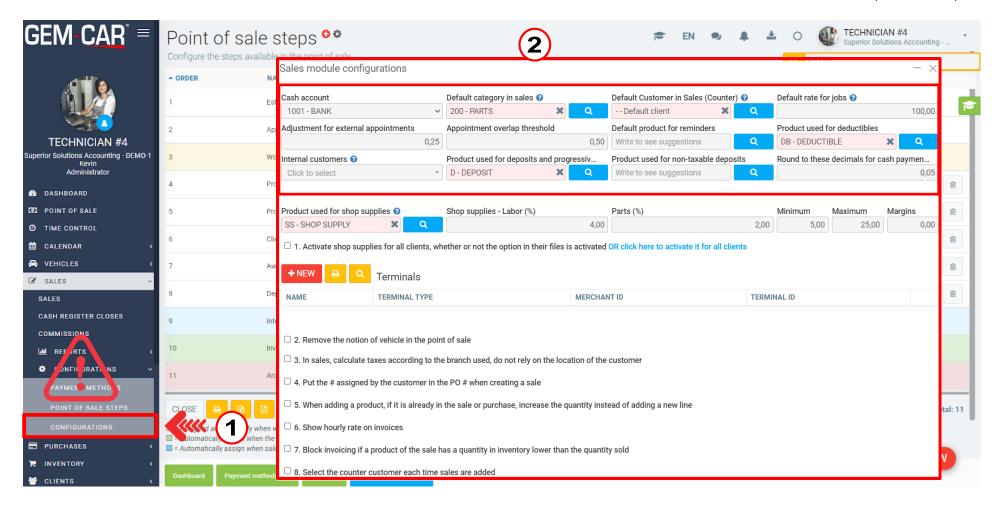
IN THE CONFIGURATION OF **POINT OF SALE STEPS**, MOST OF WHICH HAVE BEEN PRE-PROGRAMMED TO MAXIMIZE THE USE OF THE SOFTWARE. PLEASE CLICK ONCE ON THE **NEW** TAB TO OPEN **THE POINT OF SALE STEPS** WINDOW.

THEN COMPLETE THE **INFO** AND **OPTIONS** DATA FIELDS AND CLICK **SAVE**.

GEM-CAR = TECHNICIAN #4 Point of sale steps ** Configure the steps available in the point of sale Q Search. Point of sale steps - Add Point of sale steps - Add Assigned automatically when working on order **TECHNICIAN #4** Superior Solutions Accounting - DEMO-1 Assign automatically when a deposit is created on the devis Appointment Automatically assign when the sale is invoiced DASHBOARD Steps to hide when selected Automatically assign when sale is closed (checkout) D POINT OF SALE Click to select Reserved the inventory of the sale when it is at this stage O TIME CONTROL = Required fields $\ \square$ Set inventory to "Work in progress" status when the sale is at this stage M CALENDAR 2 = Contextual help available as a tooltip A VEHICLES Open the send SMS window when the sale is at this stage ☑ SALES CLOSE ☐ Sale considered inactive SALES Automatically assign when an appointment is made online. CASH REGISTR CLOSES Internal purchase Required fields COMMIS = Contextual help available as a tooltip CONFIGURATIONS Archived Total: 11 Assigned automatically when working on order = Automatically assign when the sale is invoiced ■ PURCHASES = Automatically assign when sale is closed (checkout) INVENTORY Point of sale steps × M CLIENTS

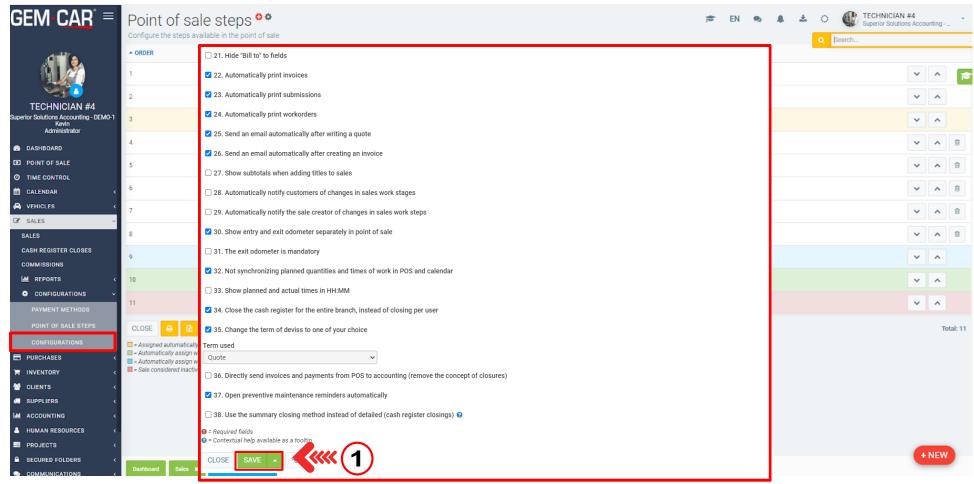
04.4 MODULE CONFIGURATIONS 1

IN THE **SALES MODULE CONFIGURATION**, MOST HAVE BEEN TICKED TO MAXIMIZE THE USE OF THE SOFTWARE.
YOU NEED TO ADD THE **HOURLY RATE**, AND THE **PURCHASE LIMIT PER USER**. THEN COMPLETE THE DATA FIELDS AND **SAVE** AT THE END. (SEE PAGE 31)



04.5 MODULE CONFIGURATIONS 2

CONTINUE TO VALIDATE THE OPTIONS AND WHEN FINISHED CLICK ON SAVE.



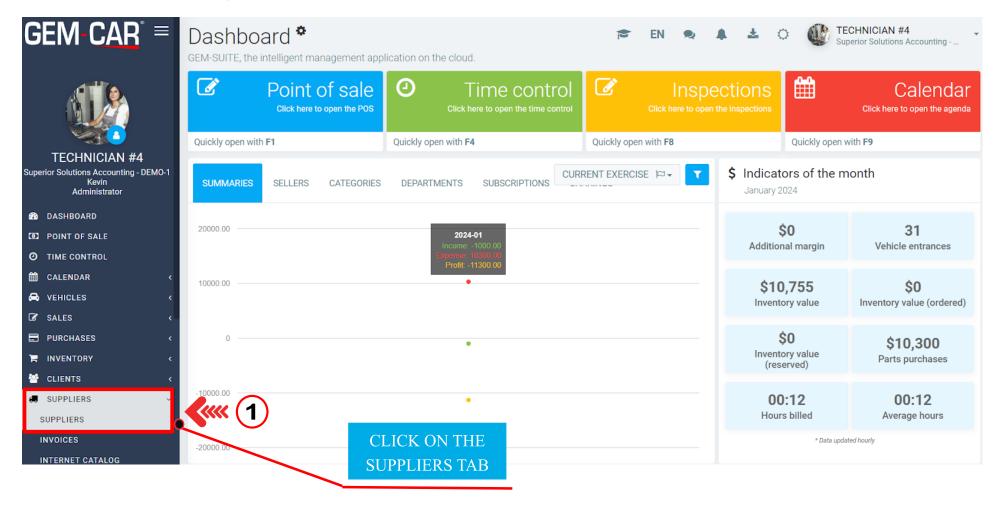
SUPPLIER CONFIGURATION



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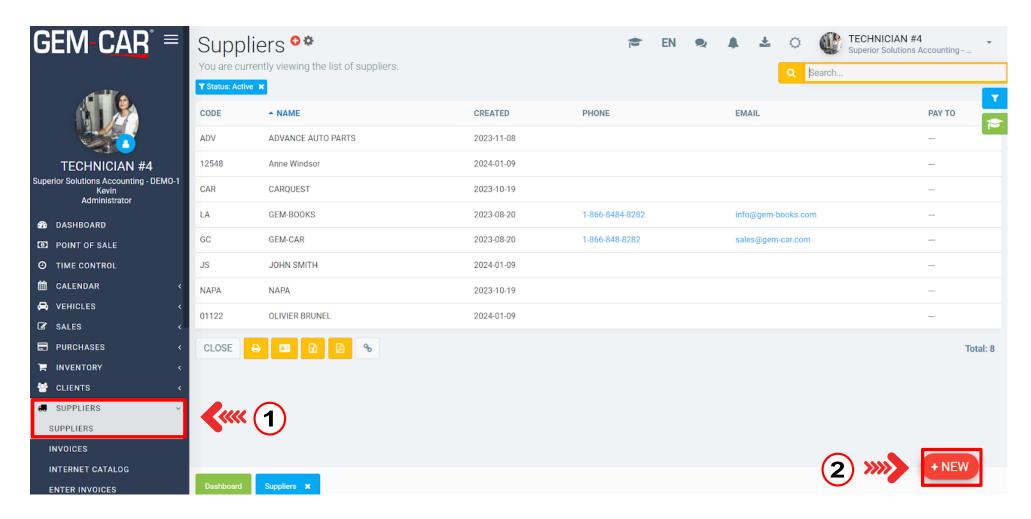
05.1 SUPPLIER CONFIGURATION

TO CONFIGURE THE SUPPLIERS, YOU NEED TO CLICK ON THE MENU TO YOUR LEFT ON THE SUPPLIERS TAB.



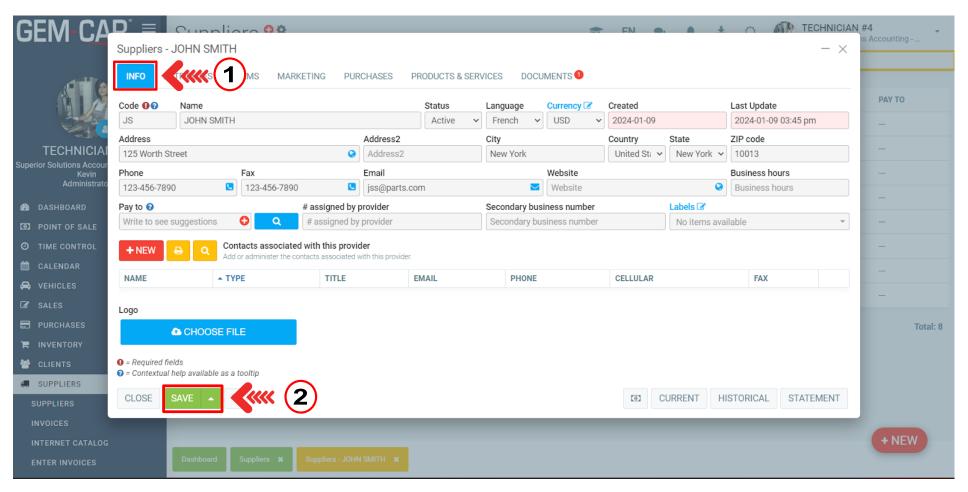
05.2 CREATE A NEW SUPPLIER

TO CREATE A NEW SUPPLIER, CLICK ON NEW.



05.3 ENTER ALL INFORMATION

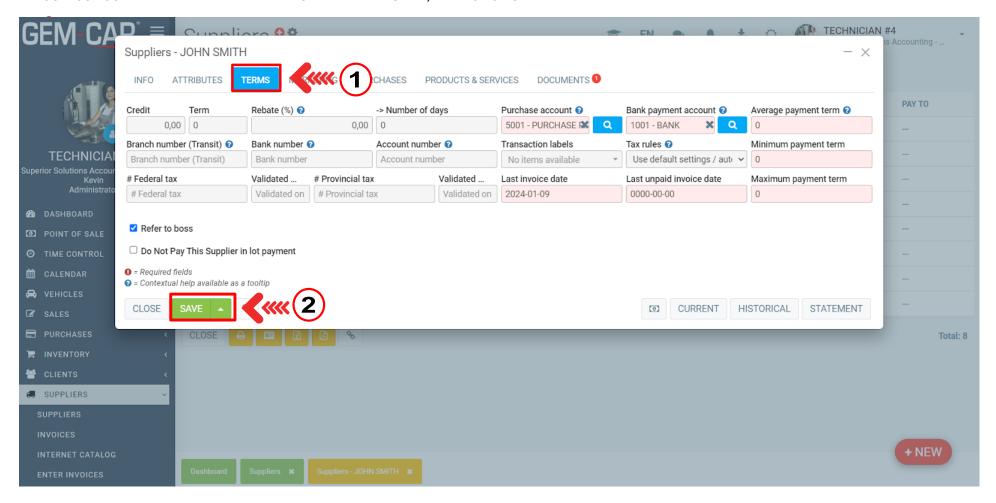
YOU MUST COMPLETE ALL THE DATA FIELDS IN THE INFO TAB, THEN CLICK ON SAVE.



05.4

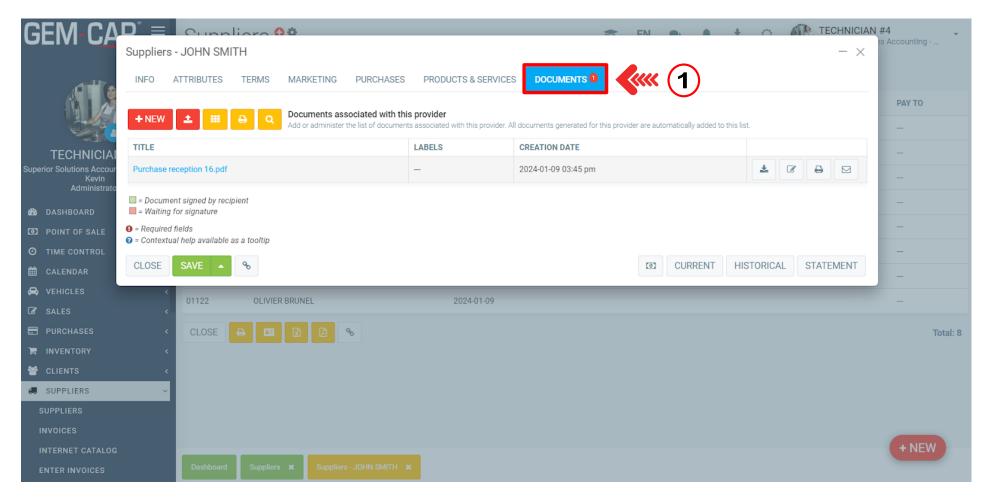
TERM CONFIGURATION

YOU MUST COMPLETE ALL THE DATA FIELDS IN THE TERMS TAB, THEN CLICK SAVE.



05.5 COMPILATION OF PURCHASE INVOICES

IN THE **DOCUMENTS** TAB, YOU WILL FIND ALL PURCHASE INVOICES AND PURCHASE ORDERS.



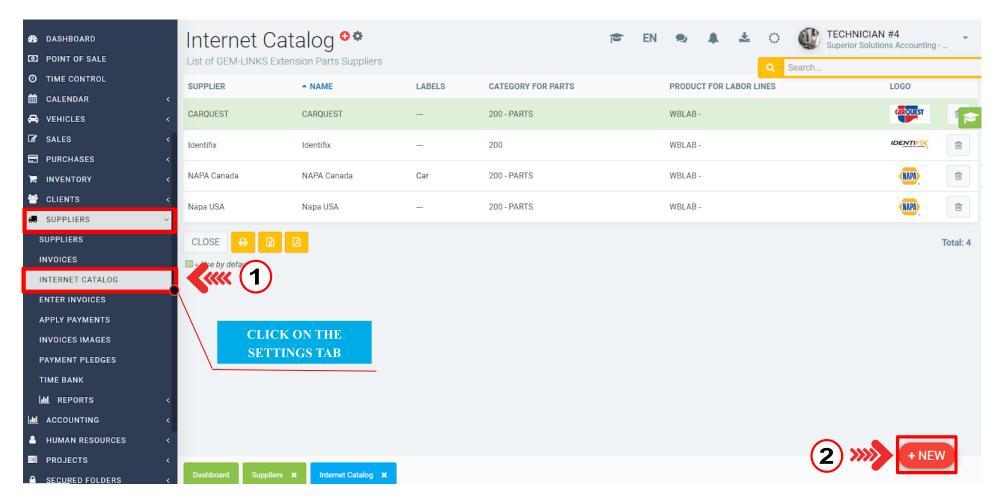
CONFIGURE LINKS FOR PURCHASING PARTS FROM A SUPPLIER



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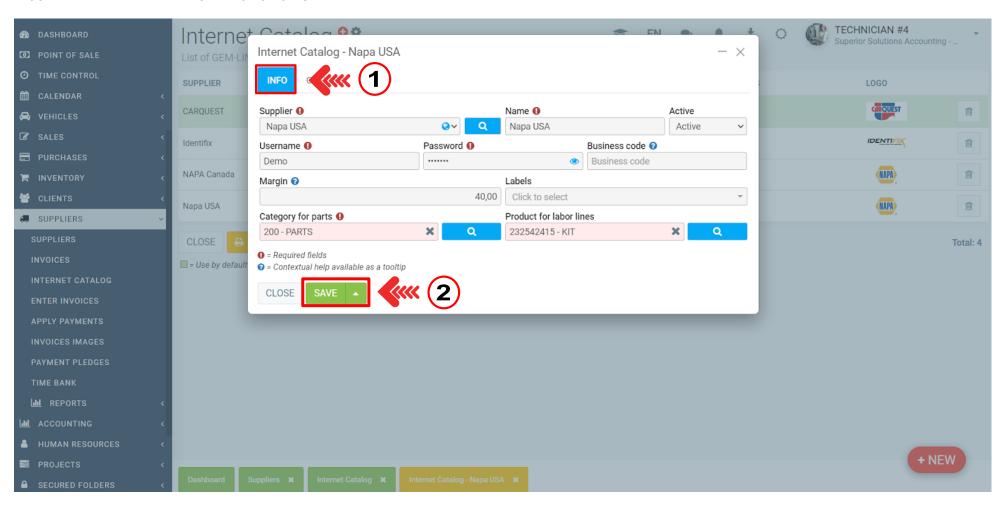
PARTS IMPORT LINKS

TO CONFIGURE LINKS FOR IMPORTING PARTS FROM A SUPPLIER, YOU NEED TO CLICK ON THE MENU TO YOUR LEFT ON THE INTERNET CATALOG TAB. THEN CLICK ON NEW TO OPEN THE INFO WINDOW.



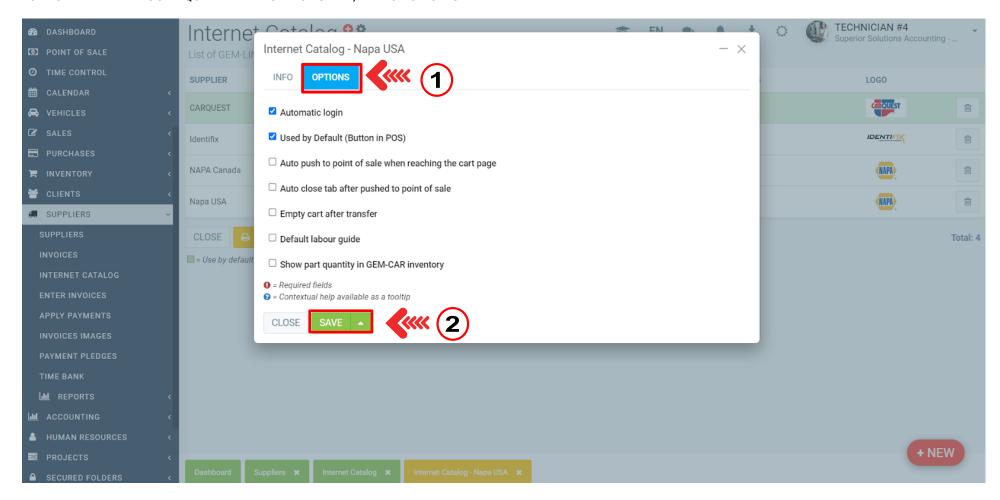
SUPPLIER CONFIGURATION

COMPLETE THE DATA FIELDS AND CLICK ON SAVE.



06.3 SETTING OPTIONS

CHECK THE DATA YOU REQUIRE IN THE OPTIONS TAB, AND CLICK ON SAVE.



HOW TO CREATE A NEW CUSTOMER

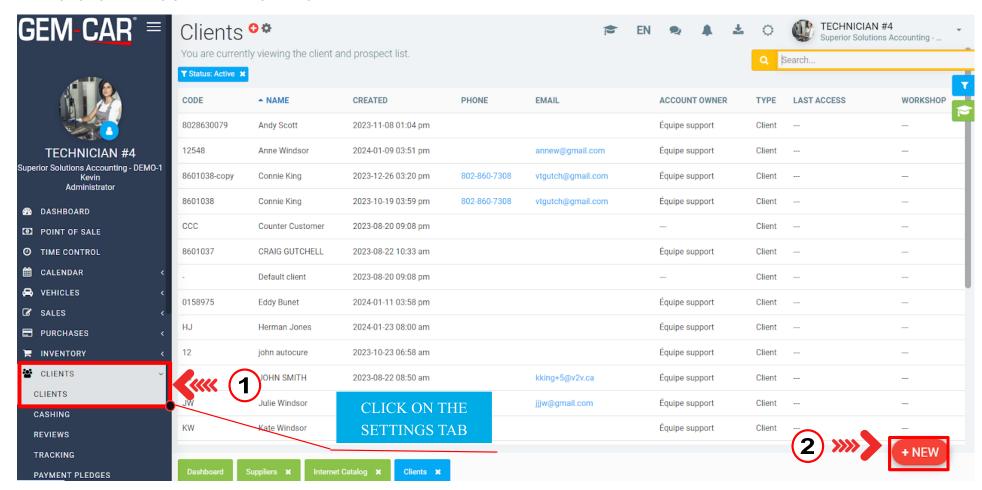
07

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07.1) CREATE A NEW CUSTOMER

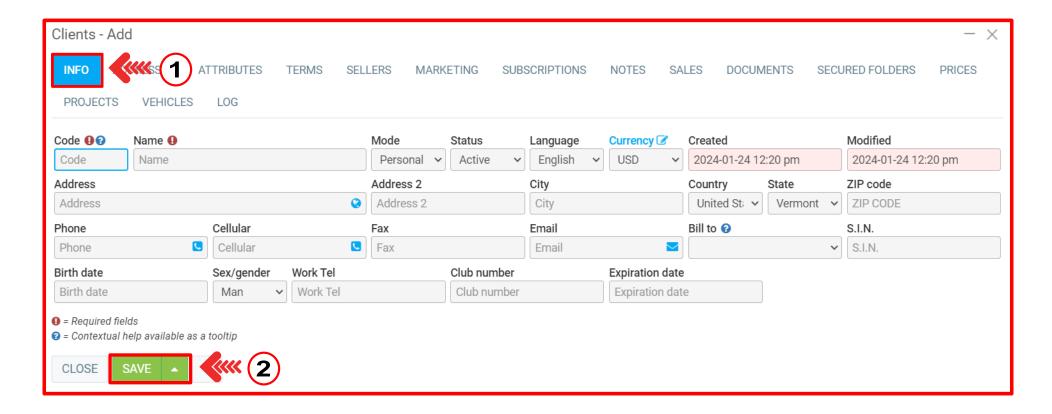
TO CREATE A NEW CUSTOMER FROM THE CUSTOMER MODULE,

YOU NEED TO CLICK ON THE MENU TO YOUR LEFT ON THE **CUSTOMERS** TAB. THEN CLICK ON **NEW** TO OPEN THE **INFO** WINDOW.



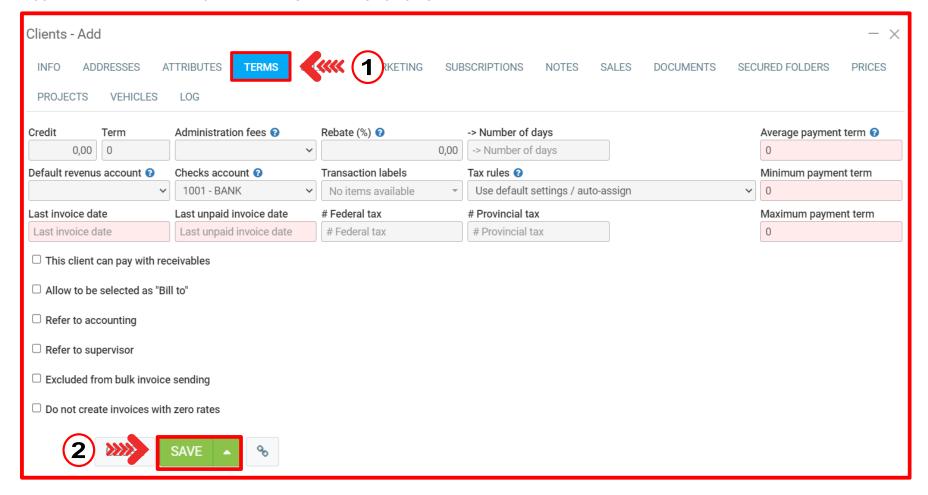
07.2 CUSTOMER INFORMATION

COMPLETE THE INFO DATA FIELDS, AND CLICK ON SAVE.



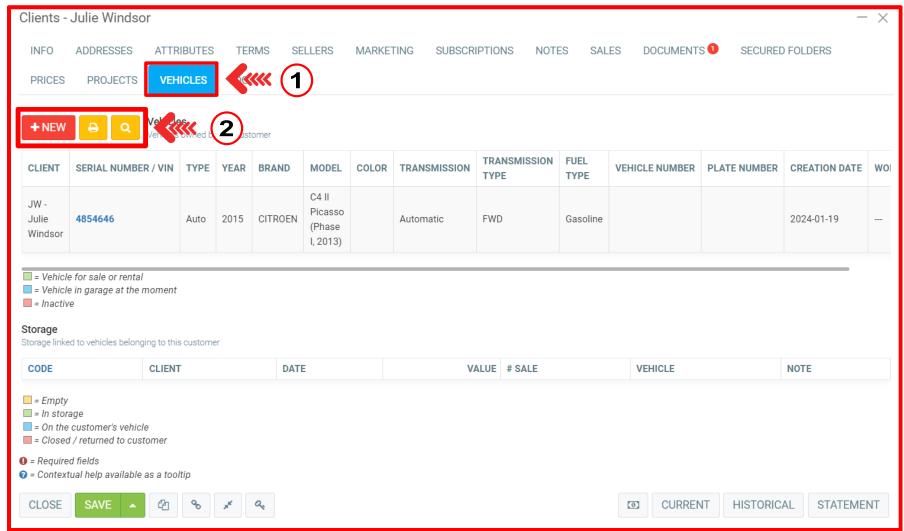
07.3 CONFIGURATION OF CUSTOMER TERMS

COMPLETE THE DATA FIELDS IN THE **TERMS** TAB AND CLICK ON **SAVE**.



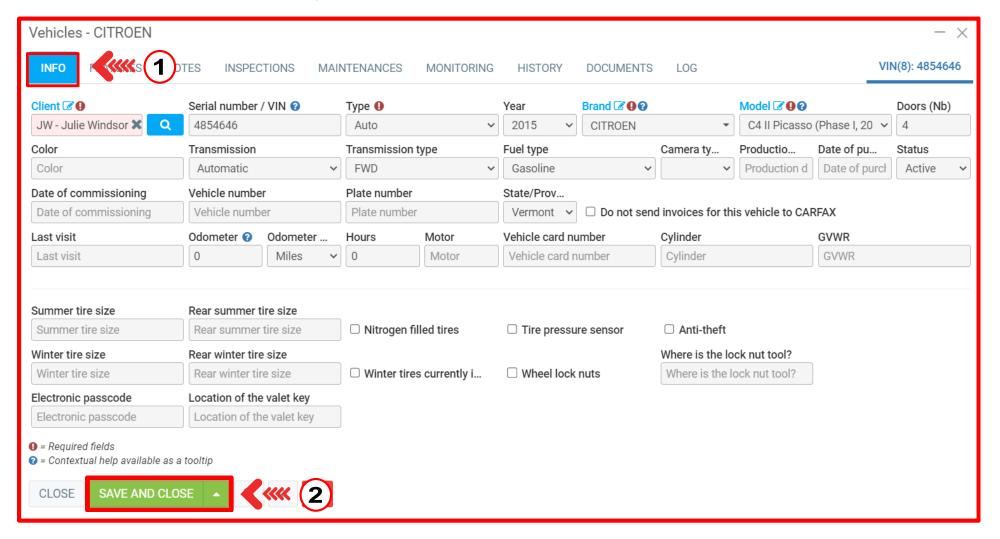
07.4 NEW VEHICLE REGISTRATION

WHEN YOU NEED TO ADD A NEW VEHICLE, CLICK ON THE VEHICLES TAB, AND CLICK ON NEW.



07.5 VEHICLE INFORMATION

COMPLETE THE DATA FIELDS IN THE INFO TAB, AND CLICK ON SAVE.



POINT OF SALE

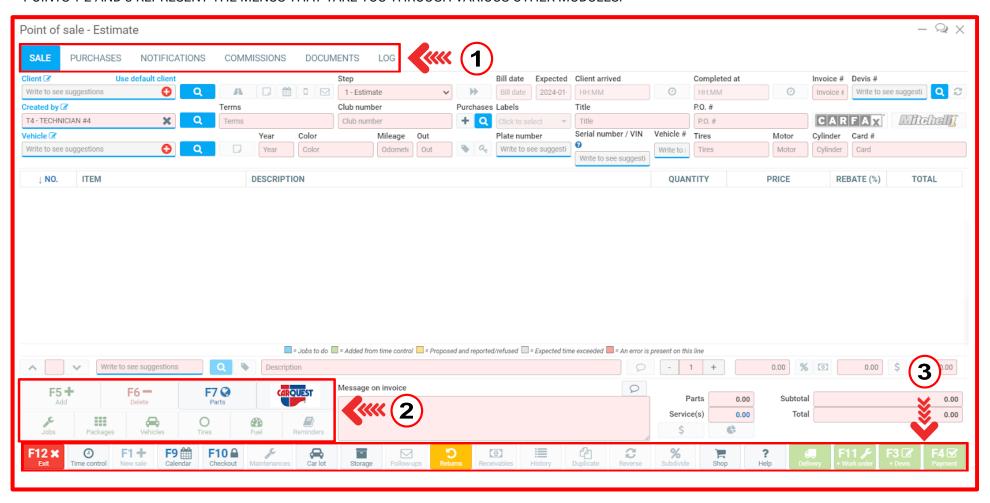


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GEM-CAR | THE NEXT GENERATION

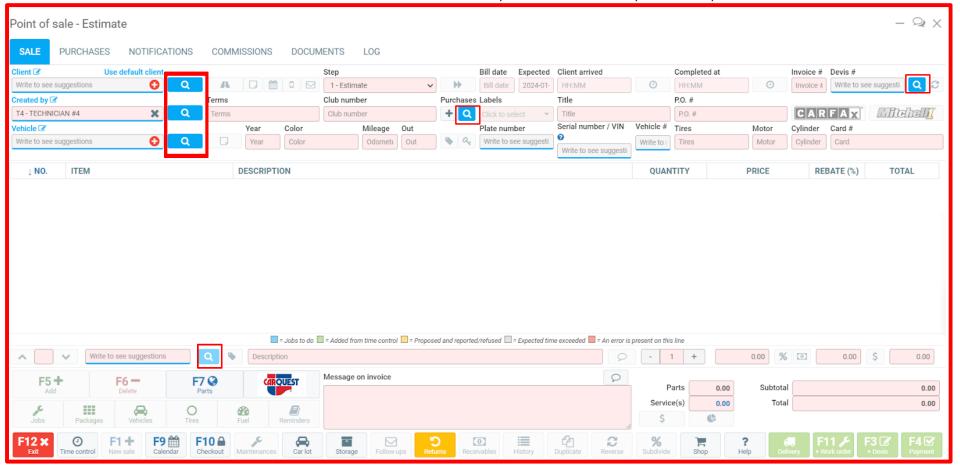
08.1 POINT OF SALE

POINTS 1-2 AND 3 REPRESENT THE MENUS THAT TAKE YOU THROUGH VARIOUS OTHER MODULES.



RESEARCH METHOD

THE MAGNIFYING GLASS LETS YOU SEARCH IN A SUB-MENU FOR A CUSTOMER, PURCHASE INVOICES, ESTIMATES, ETC.

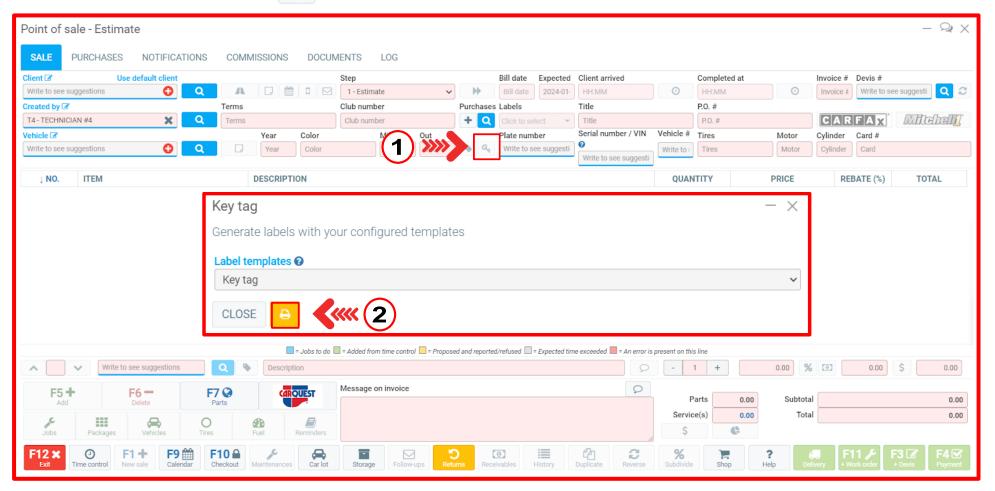


KEY LABEL PRINTING

TO PRINT A KEY LABEL, CLICK ON THE



TAB AND THEN CLICK ON THE **PRINTER** TAB.



THANK YOU FOR YOUR PARTICIPATION

For further information, see the FAQ https://faq.gem-car.com/

You can also consult our online E-LEARNING courses

https://gem-academy.net

Or contact one of our agents online at

514-940-8649