

TRAINING MANUAL

TRAINING MANUAL BEFORE USING YOUR GEM-CAR

BASIC TRAINING

GEM-CAR



Next

The *Next* GENERATION



E-LEARNING

<https://gem-academy.net/en/>

ONLINE TRAINING

00.0 TABLE OF CONTENTS

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

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

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BASIC CONFIGURATION



FOR ALL CONFIGURATION STEPS

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

01

Discover all the benefits of the best automotive workshop software in the country.

01.1

BASIC CONFIGURATION





TECHNICIAN #4
Superior Solutions Accounting - DEMO-1
Kevin
Administrator

- DASHBOARD
- POINT OF SALE
- TIME CONTROL
- CALENDAR
- VEHICLES
- SALES
- PURCHASES
- INVENTORY
- CLIENTS
- SUPPLIERS
- ACCOUNTING

Dashboard

GEM-SUITE, the intelligent management application on the cloud.



Point of sale
Click here to open the POS

Quickly open with F1



Time control
Click here to open the time control

Quickly open with F4



Inspections
Click here to open the inspections

Quickly open with F8



Calendar
Click here to open the agenda

Quickly open with F9



VERY IMPORTANT POINTS

Initial configuration is mandatory and required for GEM-CAR software to run efficiently.
That's what we're going to learn throughout this training manual.
Some basic configurations are already preconfigured, and we recommend that you leave them as they have been set up to maximize the use of the software.

To recognize preconfigured configurations, we'll address them throughout the course with this pictogram.



\$ Indicators of the month

January 2024

\$0 Additional margin	31 Vehicle entrances
\$10,755 Inventory value	\$0 Inventory value (ordered)
\$0 Inventory value (reserved)	\$10,300 Parts purchases
00:12 Hours billed	00:12 Average hours

01.2 DOWNLOAD THE DESKTOP VERSION

GEM-CAR Dashboard

GEM-SUITE, the intelligent management application on the cloud.

TECHNICIAN #4
Superior Solutions Accounting - DEMO-1
Kevin
Administrator

Point of sale
Click here to open the POS
Quickly open with F1

Time control
Click here to open the time control
Quickly open with F4

Inspections
Click here to open the inspections
Quickly open with F8

Calendar
Click here to open the agenda
Quickly open with F9

SUMMARIES SELLERS CATEGORIES DEPARTMENTS SUBSCRIPTIONS CURRENT EXERCISE

OTHER VERY IMPORTANT POINTS

All configurations are made from the menu on your right.

To maximize printer use, we recommend downloading the desktop version by clicking on the tab at the top right: **DOWNLOAD DESKTOP VERSION**

GEM-CAR STAGING

\$ Indicators of the month
January 2024

\$0 Additional margin	31 Vehicle entrances
\$10,755 Inventory value	\$0 Inventory value (ordered)
\$0 Inventory value (reserved)	\$10,300 Parts purchases
00:12 Hours billed	00:12 Average hours

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.

The screenshot displays the GEM-CAR software dashboard. On the left, a dark sidebar menu lists various modules: DASHBOARD, POINT OF SALE, TIME CONTROL, CALENDAR, VEHICLES, SALES, PURCHASES, INVENTORY, CLIENTS, SUPPLIERS, ACCOUNTING, **HUMAN RESOURCES** (highlighted with a red box and a red arrow pointing to it), TIME BANK, TRAVEL LOGS, CONTROL TIME, POSITIONS, REPORTS, PROJECTS, and SECURED FOLDERS. The main dashboard area features a 'Dashboard' header with a gear icon and a description: 'GEM-SUITE, the intelligent management application on the cloud.' Below this are four large colored buttons: 'Point of sale' (blue), 'Time control' (green), 'Inspections' (yellow), and 'Calendar' (red). Each button has a 'Click here to open the...' link and a keyboard shortcut (F1, F4, F8, F9 respectively). The 'Point of sale' button is also labeled 'Quickly open with F1'. Below these buttons is a section for 'SUMMARIES' with tabs for SELLERS, CATEGORIES, DEPARTMENTS, SUBSCRIPTIONS, and CURRENT EXERCISE. A line chart shows data for 2024-01, with a tooltip displaying: Income: -1000.00, Expense: 10300.00, Profit: -11300.00. To the right of the chart is a section titled '\$ Indicators of the month' for January 2024, containing eight cards with various financial and operational metrics. A red arrow points from the 'HUMAN RESOURCES' menu item to a blue box with the text 'CLICK ON THE HUMAN RESOURCES'.

Dashboard

GEM-SUITE, the intelligent management application on the cloud.

Point of sale
Click here to open the POS
Quickly open with F1

Time control
Click here to open the time control
Quickly open with F4

Inspections
Click here to open the inspections
Quickly open with F8

Calendar
Click here to open the agenda
Quickly open with F9

SUMMARIES SELLERS CATEGORIES DEPARTMENTS SUBSCRIPTIONS CURRENT EXERCISE

2024-01
Income: -1000.00
Expense: 10300.00
Profit: -11300.00

\$ Indicators of the month
January 2024

\$0 Additional margin	31 Vehicle entrances
\$10,755 Inventory value	\$0 Inventory value (ordered)
\$0 Inventory value (reserved)	\$10,300 Parts purchases
00:12 Hours billed	00:12 Average hours

CLICK ON THE HUMAN RESOURCES

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.

Human resources

You are currently consulting the list of human resources, which lists your employees, freelance organization.

Search...

Status: Active

CODE	NAME	WORK EMAIL	WORK PHONE	EXT	MOBILE PHONE	CITY	STATE/PROVINCE	ROLE
AC	ACCOUNTANT-JOE						Vermont	External accountant (system role)
ad1	ADVISOR #1						Vermont	---
AD2	ADVISOR #2						Vermont	---
adv2	Advisor 2						Vermont	Mechanic (system role)
AJC	Angie Clapp						Vermont	Administrator (system role)
TC	Anne						Vermont	---
1111	Bianca						Vermont	---
BD	Britney	by@v2v.ca					Vermont	Administrator (system role)
T3	GEORGE						Vermont	---
T1	JOHN DOE						Vermont	---

Dashboard Human resources

+ NEW

01.5 INFO CONFIGURATION

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

Human resources - TECHNICIAN #4

INFOS DESCRIPTION PROJECTS PAYROLL DOCUMENTS ATTRIBUTES CLIENTS SCHEDULE EMAIL SELLER

SECURED FOLDERS LOG

Code ⓘ	Name ⓘ	Status	Language	Created	Last access
T4	TECHNICIAN #4	Active ▾	English ▾	2023-08-20	2024-01-23 12:39 pm
S.I.N.	Birthdate	Date hired	Employment end date	Labels	OFA Expiration Date
S.I.N.	Birthdate	Date hired	Employment end date	No items available ▾	OFA Expiration Date

Work email	Personal email	Work phone	Ext	Mobile phone	Instant messaging ⓘ
TC4@gmail.com	Personal email	Work phone	Ext	Mobile phone	Instant messaging

Address	Address 2	City	Country	State	ZIP code
125 Worth Street	Address 2	New York	United St ▾	New York ▾	10013

Branch number (Transit) ⓘ	Bank number ⓘ	Account number ⓘ	Driver's license	Expiration
Branch number (Transit)	Bank number	Account number	Driver's license	Expiration

Picture

2 **SAVE** [Copy] [Link] [Search]

01.6 JOB DESCRIPTION

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

Human resources - TECHNICIAN #4

INFOS NOTES **JOB DESCRIPTION** 1 ROLL DOCUMENTS ATTRIBUTES CLIENTS SCHEDULE EMAIL SELLER SECURED FOLDERS

LOG

Title Rate / Kilometer

Technician 0,00

+ NEW Positions Define the positions (Objectives and responsibilities) of this human resource

JOB TITLE

= Required fields
 = Contextual help available as a tooltip

CLOSE **SAVE** 2

ID	NAME	EMAIL	LOCATION	ROLE
NT	NT	nt@v2v.ca	Vermont	---
OB	Olivier Brunel	obrunel@v2v.ca	Vermont	Administrator (system role)
T2	RANDY		Vermont	---
T4	TECHNICIAN #4		Vermont	Administrator (system role)
T5	TECHNICIAN #5		Vermont	---

+ NEW

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**.

Human resources - TECHNICIAN #4

INFO NOTES JOB DESCRIPTION PROJECTS **PAYROLL** CLIENTS SCHEDULE EMAIL SELLER SECURED FOLDERS LOG

HR Type
Employee

☒ This employee pays employment insurance benefits

☒ This employee pays R.R.Q.

☒ This employee is subject to CNESST

% Vacation provision 4,000 % sickness provision 0,000 FTQ / CSN funds (annual) 0,00

Provincial personal exemption 18056,00 ☒ Default exemption Supplemental retention (annual) 0,00

Federal personal exemption 15705,00 ☒ Default exemption Supplemental retention (annual) 0,00

Normal hours 40,00 Number of days 5

Regular hourly rate 30,00 Hourly rate #2 0,00 Hourly rate #3 0,00 Hourly rate #4 0,00

SAVE

01.8 SCHEDULE CONFIGURATION

THEN CLICK ON **NEW**.

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

Human resources - TECHNICIAN #4

INFOS NOTES JOB DESCRIPTION PROJECTS PAYROLL DOCUMENTS ATTRIBUTES CLIENTS **SCHEDULE** SECURED FOLDERS

LOG

+ NEW schedule of this human resource
administer the work schedule of this human resource.

DAY OF WEEK
Monday, Tuesday, Wednesday, Thursday, Friday

START TIME END TIME HOUR MEAL START HOUR MEAL END

Schedule

INFO

Day of week
Monday, Tuesday, Wednesday, Thursday, Friday

Start time 8:00 AM End time 5:00 PM

Hour meal start 12:00 PM Hour meal end 1:00 PM

SAVE AND CLOSE

Legend:
! = Required fields
? = Contextual help available as a tooltip

01.9

MAILBOX CONFIGURATION

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

The screenshot shows the 'Human resources - TECHNICIAN #4' configuration page. The 'EMAIL' tab is selected and highlighted with a red box and a red arrow pointing to it, labeled with a circled '1'. Below the tabs, the 'Email address used for SMTP or IMAP' field is highlighted with a red box. The configuration fields include:

- SMTP Server:** SMTP Server
- SMTP port:** 0
- Encryption:** TLS
- SMTP username:** SMTP username
- SMTP password:** (password field with eye icon)
- IMAP Server:** IMAP Server
- IMAP port:** 0
- Encryption:** TLS
- IMAP username:** IMAP username
- IMAP password:** (password field with eye icon)
- Signature:** (signature field with icons for text, bold, italic, link, unlink, image, and other formatting options)

A blue box on the right contains the following text:

! VERY IMPORTANT POINTS

For SMTP server configuration, please refer to the GEM-CAR FAQ.

CLICK ON THE HELP TAB?

How do I configure SMTP to send emails from my address instead of no-reply@gem-books.com?

At the bottom, the 'SAVE' button is highlighted with a red box and a red arrow pointing to it, labeled with a circled '2'. The 'CLOSE' button is also visible.

GEM-CAR | THE NEXT GENERATION

CALENDAR CONFIGURATION

02

Discover all the benefits of the best automotive workshop software in the country.

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.

GEM-CAR Dashboard

GEM-SUITE, the intelligent management application on the cloud.

TECHNICIAN #4
Superior Solutions Accounting - DEMO-1
Kevin Administrator

CALENDAR CONFIGURATIONS

JOB STATUS

CALENDAR DAY COLORS

BAYS

VIEWS

BUSINESS HOURS

VEHICLES

Point of sale
Click here to open the POS
Quickly open with F1

Time control
Click here to open the time control
Quickly open with F4

Inspections
Click here to open the inspections
Quickly open with F8

Calendar
Click here to open the agenda
Quickly open with F9

SUMMARIES SELLERS CATEGORIES DEPARTMENTS SUBSCRIPTIONS CURRENT EXERCISE

2024-01
Income: -1000.00
Expense: 10300.00
Profit: -11300.00

\$ Indicators of the month
January 2024

\$0 Additional margin	31 Vehicle entrances
\$10,755 Inventory value	\$0 Inventory value (ordered)
\$0 Inventory value (reserved)	\$10,300 Parts purchases
00:12 Hours billed	00:12 Average hours

* Data updated hourly

CLICK ON THE JOB STATUS TAB

02.2 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.

Job status

List of stages for calendar appointments

▼ Status: Active ✕

NAME	ORDER	TEXT COLOR	BACKGROUND COLOR
NOT PLANNED	1		
IN PROGRESS			
PENDING FOR CUSTOMER			
PENDING FOR SUPERVISOR			
PENDING FOR PARTS			
PARTS ORDERED			
PARTS RECEIVED			
PARTS TO RETURN			
COMPLETED			
PENDING FOR INVOICE	10		
INVOICED	11		
INVOICED JOB	12		

Job status - Add

INFO

Name: In progress Order: 2 Status: Active ▼

Text color: Background color:

❗ = Required fields
❓ = Contextual help available as a tooltip

CLOSE SAVE

+ NEW

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.

GEM-CAR

TECHNICIAN #4
Superior Solutions Accounting - DEMO-1
Kevin
Administrator

DASHBOARD
POINT OF SALE
TIME CONTROL
CALENDAR
CALENDAR
CONFIGURATIONS
JOB STATUS
CALENDAR DAY COLORS
BAYS
VIEWS
BUSINESS HOURS
VEHICLES
SALES

Calendar day colors

List of colors of the days of the calendar of the agenda according to the traffic

PERCENTAGE MINIMUM	BACKGROUND COLOR	TEXT COLOR
20		
40		
60		
70		

CLOSE

Calendar day colors - Add

Percentage minimum
4

Background color

Text color

= Required fields
 = Contextual help available as a tooltip

CLOSE SAVE

Total: 4

2 + NEW

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**.

GEM-CAR **TECHNICIAN #4**
Superior Solutions Accounting - DEMO-1
Kevin Administrator

Bays **+** **⚙️**
List of columns for the agenda

Disabled: No

NAME	TECHNICIAN WORKING ON THIS BAY	ORDER
JOHN DOE		1
RANDY		2
GEORGE		

Bays - RANDY

INFO **OPTIONS**

Name: RANDY

Technician working on this bay: T2 - RANDY Initials: T2 Order: 2

Bay type: Allow invoicing Type of vehicles: Auto

Title displayed for lunch: LUNCH

Lunch start: 12:00 PM Lunch end: 1:00 PM Work in progress: ☒

Options:

- ☒ Make it accessible on the external appointment booking form
- ☒ Allow to schedule out of business hours
- ☐ Disabled
- ☐ Products from sales of this bay will be considered reserved
- ☐ The technician assigned to this bay can assign themselves unassigned jobs
- ☒ Check if the technician's permit is valid when starting a job

SAVE **⬅️**

02.5

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**.

The screenshot illustrates the process of deactivating a technician in the GEM-CAR software. The interface is divided into a sidebar, a main area, and two pop-up windows.

Step 1: In the sidebar, the **BAYS** option is highlighted.

Step 2: In the main area, the technician **RANDY** is selected from the list.

Step 3: The **INFO** window for **Bays - RANDY** is open, and the **OPTIONS** button is clicked.

Step 4: In the **Options** window, the **Disabled** checkbox is checked.

Step 5: The **Migrate bay** window appears, and the **SEND** button is clicked.

Step 6: In the **Options** window, the **SAVE** button is clicked.

The sidebar contains the following navigation options: DASHBOARD, POINT OF SALE, TIME CONTROL, CALENDAR, CALENDAR CONFIGURATIONS, JOB STATUS, CALENDAR DAY COLORS, BAYS, VIEWS, BUSINESS HOURS, VEHICLES, and SALES. The main area shows a list of technicians: JOHN DOE, RANDY, and GEORGE. The **INFO** window for **Bays - RANDY** includes options to make it accessible on the external appointment booking form, allow scheduling out of business hours, and disable the bay. The **Migrate bay** window prompts the user to choose where to migrate upcoming appointments, with **GEORGE** selected as the destination.

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**.

The screenshot displays the GEM-CAR software interface for 'Views' configuration. The left sidebar contains a menu with 'VIEWS' highlighted by a red box and a red arrow labeled '1'. The main area shows a list of calendar views with columns for 'NAME' and 'BAYS'. A modal window titled 'Views - Add' is open, showing fields for 'Name' (OIL CHANGE) and 'Bays' (RANDY). The modal has a red border and a red arrow labeled '3' pointing to the 'SAVE' button. At the bottom right, a red box labeled '2' contains a red arrow pointing to a '+ NEW' button. The bottom bar shows 'Views' as the active tab.

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**.

The screenshot displays the GEM-CAR software interface for configuring business hours. The sidebar on the left contains navigation options: DASHBOARD, POINT OF SALE, TIME CONTROL, CALENDAR, and BUSINESS HOURS (highlighted with a red box and a red arrow labeled '1'). The main area shows the 'Business hours' configuration page with a table of business hours. The table has columns for 'DAY OF WEEK', 'OPENING TIME', and 'CLOSING TIME'. The current table shows hours for Monday through Saturday. A modal window titled 'Business hours - Add' is open, showing fields for 'Day of week' (set to Saturday), 'Opening time' (8:00 AM), and 'Closing time' (12:00 PM). The modal has a 'SAVE' button (highlighted with a red box and a red arrow labeled '3') and a 'CLOSE' button. A red arrow labeled '2' points to the '+ NEW' button in the bottom right corner of the main area. The bottom of the interface shows a breadcrumb trail: Dashboard > Job status > Calendar day colors > Bays > Views > Business hours.

DAY OF WEEK	OPENING TIME	CLOSING TIME
Monday	08:00 am	05:00 pm
Tuesday	08:00 am	05:00 pm
Wednesday		
Thursday		
Friday		
Saturday		

Business hours - Add

Day of week: Saturday

Opening time: 8:00 AM

Closing time: 12:00 PM

1 = Required fields
2 = Contextual help available as a tooltip

SAVE

+ NEW

VEHICLE CONFIGURATION

03

Discover all the benefits of the best automotive workshop software in the country.

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.

The screenshot displays the GEM-CAR software interface. On the left is a dark sidebar menu with the GEM-CAR logo at the top. Below the logo is a user profile for 'TECHNICIAN #4' (Kevin, Administrator). The menu items include: DASHBOARD, POINT OF SALE, TIME CONTROL, CALENDAR, VEHICLES (highlighted with a red box), VEHICLES (sub-menu), INSPECTIONS, MAINTENANCE PROGRAMS, STORAGE, REPORTS, CONFIGURATIONS (sub-menu), and a red box around 'VEHICLE BRANDS' with a red arrow pointing to it and a circled '1'. Below this is 'VEHICLE OPTIONS' and 'CONFIGURATIONS'. The main dashboard area has a header with 'Dashboard' and a sub-header 'GEM-SUITE, the intelligent management application on the cloud.' Below this are four large colored buttons: 'Point of sale' (blue), 'Time control' (green), 'Inspections' (yellow), and 'Calendar' (red). Below these are four smaller buttons: 'SUMMARIES', 'SELLERS', 'CATEGORIES', 'DEPARTMENTS', 'SUBSCRIPTIONS', 'CURRENT EXERCISE', and a filter icon. The main content area shows a line chart for '2024-01' with data points for Income, Expense, and Profit. To the right of the chart is a section titled '\$ Indicators of the month' for 'January 2024' with eight boxes showing various financial metrics: Additional margin (\$0), Vehicle entrances (31), Inventory value (\$10,755), Inventory value (ordered) (\$0), Inventory value (reserved) (\$0), Parts purchases (\$10,300), Hours billed (00:12), and Average hours (00:12). At the bottom of the dashboard are sections for 'Technicians performance' and 'Financial indicators'.

VEHICLE BRANDS

CLICK ON THE VEHICLE BRAND 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**.

GEM-CAR

TECHNICIAN #4
Superior Solutions Accounting - DEMO-1
Kevin
Administrator

DASHBOARD
POINT OF SALE
TIME CONTROL
CALENDAR
VEHICLES
VEHICLES
INSPECTIONS
MAINTENANCE PROGRAMS
STORAGE
REPORTS
CONFIGURATIONS
VEHICLE BRANDS
VEHICLE OPTIONS
CONFIGURATIONS

Vehicle brands

List of available manufacturers and models

Vehicle brands - DE LOREAN

Brand: DE LOREAN Inactive: No

+ NEW

VEHICLE TYPE: Auto MODEL: Dmc-12 YEAR FROM: 1981 YEAR TO: 1983

= Inactive
 = Required fields
 = Contextual help available as a tooltip

CLOSE SAVE

Models - New

Vehicle type: Auto Inactive: No

Model: METOR

Year from: 2024 Year to: 2024

= Inactive
 = Required fields
 = Contextual help available as a tooltip

CLOSE SAVE AND CLOSE

Dashboards Vehicle brands

+ NEW

03.3

SETTING OPTIONS

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**.

The screenshot displays the GEM-CAR software interface. On the left, a sidebar contains navigation menus: DASHBOARD, POINT OF SALE, TIME CONTROL, CALENDAR, VEHICLES, VEHICLES, INSPECTIONS, MAINTENANCE PROGRAMS, STORAGE, REPORTS, CONFIGURATIONS, VEHICLE OPTIONS (highlighted with a red box and arrow labeled 1), CONFIGURATIONS, SALES, PURCHASES, and INVENTORY. The main content area is titled 'Vehicle options' and lists various options: AUTO HOLD BRAKES, AUTO RAIN DETECTOR, BLIND SPOT DETECTION, BLIND SPOT SAFETY, CAMERA 360, COLLISION DETECTION, HEADS UP DISPLAY WINDSHIELD, HEATED WINDSHIELD, HUD, HUMIDITY SENSING WINDSHIELD, LANE CHANGE DETECTION, and RAIN. A modal window titled 'Vehicle options - Add' is open, showing a form with a text input field containing 'CAMERA 360°'. Below the input field, there are instructions: 'i = Required fields' and '? = Contextual help available as a tooltip'. At the bottom of the modal, there are buttons for 'CLOSE', 'SAVE' (highlighted with a red box and arrow labeled 3), and a green button with a plus sign. In the bottom right corner of the main content area, there is a red box with a plus sign and the text '+ NEW' (labeled 2). The bottom of the interface shows a navigation bar with buttons for Dashboard, Vehicle brands, Vehicles, and Vehicle options.

SALES CONFIGURATION

04

Discover all the benefits of the best automotive workshop software in the country.

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**.

The screenshot displays the GEM-SUITE dashboard for Technician #4 (Kevin, Administrator). The left sidebar menu has 'SALES' highlighted with a red box. Below it, 'CONFIGURATIONS' is also highlighted with a red box and a red arrow pointing to it, accompanied by a red circle with the number '1'. A blue callout box with the text 'CLICK ON THE SETTINGS TAB' points to the gear icon next to 'CONFIGURATIONS'.

The main dashboard area shows a 'SALARIES' chart for January 2024 with the following data:

Category	Value
Income	-1000.00
Expense	10300.00
Profit	-11300.00

The right sidebar displays 'Indicators of the month' for January 2024:

Indicator	Value
Additional margin	\$0
Vehicle entrances	31
Inventory value	\$10,755
Inventory value (ordered)	\$0
Inventory value (reserved)	\$0
Parts purchases	\$10,300
Hours billed	00:12
Average hours	00:12

* Data updated hourly

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.

The screenshot displays the GEM-CAR software interface. On the left, a sidebar contains navigation options: DASHBOARD, POINT OF SALE, TIME CONTROL, CALENDAR, VEHICLES, SALES, and a section for SALES with sub-options like CASH REGISTER, CLOSURES, COMMISSIONS, REPORTS, and CONFIGURATIONS. The 'PAYMENT METHODS' option is highlighted with a red box and a red arrow labeled '1'. The main content area is titled 'Payment methods' and includes a search bar and a table with columns: NAME, ACCOUNT, and LINKED TO THIS TYPE OF PAYMENT ON THE TERMINAL. The table lists various payment methods like CASH, CHECK, DEBIT CARD, INTERAC, MASTERCARD, NATIONAL ACCOUNT, VEHICLE EXPENSE LOANER, VEHICLE INVENTORY ASSET IMPROVEMENT, and VISA. A modal window titled 'Payment methods - Add' is open, showing fields for Name (MASTERCARD), Account (1001 - BANK), and a dropdown for 'Linked to this type of payment on the terminal'. The modal has buttons for CLOSE, SAVE, and a red arrow labeled '3' pointing to the SAVE button. A red box and arrow labeled '2' point to the '+ NEW' button in the bottom right corner.

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**.

Point of sale steps

Configure the steps available in the point of sale

Point of sale steps - Add

INFO **3**

Name

Appointment

Steps to hide when selected

Click to select

= Required fields
 = Contextual help available as a tooltip

Options **4**

☐ Assigned automatically when working on order

☐ Assign automatically when a deposit is created on the devis

☐ Automatically assign when the sale is invoiced

☐ Automatically assign when sale is closed (checkout)

☒ Reserved the inventory of the sale when it is at this stage

☐ Set inventory to "Work in progress" status when the sale is at this stage

☐ Open the send SMS window when the sale is at this stage

☐ Sale considered inactive

☐ Automatically assign when an appointment is made online.

= Required fields
 = Contextual help available as a tooltip

SAVE **5**

1

2 **+ NEW**

9 Internal purchase

10 Invoice

11 Archived

Legend:

- = Assigned automatically when working on order
- = Automatically assign when the sale is invoiced
- = Automatically assign when sale is closed (checkout)

Dashboard Payment methods Sales Point of sale steps

Total: 11

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)

GEM-CAR Point of sale steps

Configure the steps available in the point of sale

SALES module configurations

1	Est	Cash account	1001 - BANK	Default category in sales	200 - PARTS	Default Customer in Sales (Counter)	-- Default client	Default rate for jobs	100,00								
2	Ap	Adjustment for external appointments	0,25	Appointment overlap threshold	0,50	Default product for reminders	Write to see suggestions	Product used for deductibles	DB - DEDUCTIBLE								
3	Wo	Internal customers	Click to select	Product used for deposits and progressiv...	D - DEPOSIT	Product used for non-taxable deposits	Write to see suggestions	Round to these decimals for cash paymen...	0,05								
4	Pro	Product used for shop supplies	SS - SHOP SUPPLY	Shop supplies - Labor (%)	4,00	Parts (%)	2,00	Minimum	5,00								
5	Pro	Shop supplies - Labor (%)	4,00	Parts (%)	2,00	Minimum	5,00	Maximum	25,00								
6	Cli	1. Activate shop supplies for all clients, whether or not the option in their files is activated	OR click here to activate it for all clients														
7	Aw	☐ 2. Remove the notion of vehicle in the point of sale ☐ 3. In sales, calculate taxes according to the branch used, do not rely on the location of the customer ☐ 4. Put the # assigned by the customer in the PO # when creating a sale ☐ 5. When adding a product, if it is already in the sale or purchase, increase the quantity instead of adding a new line ☐ 6. Show hourly rate on invoices ☐ 7. Block invoicing if a product of the sale has a quantity in inventory lower than the quantity sold ☐ 8. Select the counter customer each time sales are added															
8	De	<table border="1"> <thead> <tr> <th>NAME</th> <th>TERMINAL TYPE</th> <th>MERCHANT ID</th> <th>TERMINAL ID</th> </tr> </thead> <tbody> <tr> <td colspan="4"> </td> </tr> </tbody> </table>								NAME	TERMINAL TYPE	MERCHANT ID	TERMINAL ID				
NAME	TERMINAL TYPE	MERCHANT ID	TERMINAL ID														
9	Int																
10	Inv																
11	Ar																

1

2

04.5 MODULE CONFIGURATIONS 2

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

GEM-CAR **Point of sale steps**
Configure the steps available in the point of sale

TECHNICIAN #4
Superior Solutions Accounting - DEMO-1
Kevin
Administrator

SALES

- SALES
- CASH REGISTER CLOSURES
- COMMISSIONS
- REPORTS
- CONFIGURATIONS
- PAYMENT METHODS
- POINT OF SALE STEPS
- CONFIGURATIONS
- PURCHASES
- INVENTORY
- CLIENTS
- SUPPLIERS
- ACCOUNTING
- HUMAN RESOURCES
- PROJECTS
- SECURED FOLDERS
- COMMUNICATIONS

ORDER

- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9
- 10
- 11

21. Hide "Bill to" to fields

☒ 22. Automatically print invoices

☒ 23. Automatically print submissions

☒ 24. Automatically print workorders

☒ 25. Send an email automatically after writing a quote

☒ 26. Send an email automatically after creating an invoice

☐ 27. Show subtotals when adding titles to sales

☐ 28. Automatically notify customers of changes in sales work stages

☐ 29. Automatically notify the sale creator of changes in sales work steps

☒ 30. Show entry and exit odometer separately in point of sale

☐ 31. The exit odometer is mandatory

☒ 32. Not synchronizing planned quantities and times of work in POS and calendar

☐ 33. Show planned and actual times in HH:MM

☒ 34. Close the cash register for the entire branch, instead of closing per user

☒ 35. Change the term of devis to one of your choice

Term used
Quote

☐ 36. Directly send invoices and payments from POS to accounting (remove the concept of closures)

☒ 37. Open preventive maintenance reminders automatically

☐ 38. Use the summary closing method instead of detailed (cash register closings)

1

SAVE

+ NEW

SUPPLIER CONFIGURATION

05

Discover all the benefits of the best automotive workshop software in the country.

05.1 SUPPLIER CONFIGURATION

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

The screenshot displays the GEM-CAR Dashboard interface. On the left sidebar, the 'SUPPLIERS' menu item is highlighted with a red box and a red arrow pointing to it, with a circled '1' next to the arrow. The main dashboard area shows a 'Dashboard' header with a gear icon, followed by a description 'GEM-SUITE, the intelligent management application on the cloud.' Below this are four large colored buttons: 'Point of sale' (blue), 'Time control' (green), 'Inspections' (yellow), and 'Calendar' (red). Each button has a sub-label 'Click here to open the [feature]' and a keyboard shortcut (F1, F4, F8, F9 respectively). Below these buttons is a section titled 'SUMMARIES' with tabs for 'SELLERS', 'CATEGORIES', 'DEPARTMENTS', and 'SUBSCRIPTIONS'. The 'SUMMARIES' tab is active, showing a line chart for '2024-01' with data points for Income, Expense, and Profit. To the right of the chart is a section titled '\$ Indicators of the month' for 'January 2024', containing eight boxes with various financial and operational metrics.

TECHNICIAN #4
Superior Solutions Accounting - DEMO-1
Kevin
Administrator

Dashboard
GEM-SUITE, the intelligent management application on the cloud.

Point of sale
Click here to open the POS
Quickly open with F1

Time control
Click here to open the time control
Quickly open with F4

Inspections
Click here to open the Inspections
Quickly open with F8

Calendar
Click here to open the agenda
Quickly open with F9

SUMMARIES SELLERS CATEGORIES DEPARTMENTS SUBSCRIPTIONS CURRENT EXERCISE

2024-01
Income: -1000.00
Expense: 10300.00
Profit: -11300.00

\$ Indicators of the month
January 2024

\$0 Additional margin	31 Vehicle entrances
\$10,755 Inventory value	\$0 Inventory value (ordered)
\$0 Inventory value (reserved)	\$10,300 Parts purchases
00:12 Hours billed	00:12 Average hours

* Data updated hourly

CLICK ON THE SUPPLIERS TAB

05.2

CREATE A NEW SUPPLIER

TO CREATE A NEW SUPPLIER, CLICK ON **NEW**.

GEM-CAR

Suppliers

You are currently viewing the list of suppliers.

TECHNICIAN #4
Superior Solutions Accounting - DEMO-1
Kevin
Administrator

Navigation Menu:

- DASHBOARD
- POINT OF SALE
- TIME CONTROL
- CALENDAR
- VEHICLES
- SALES
- PURCHASES
- INVENTORY
- CLIENTS
- SUPPLIERS**
- INVOICES
- INTERNET CATALOG
- ENTER INVOICES

Suppliers Table:

CODE	NAME	CREATED	PHONE	EMAIL	PAY TO
ADV	ADVANCE AUTO PARTS	2023-11-08			---
12548	Anne Windsor	2024-01-09			---
CAR	CARQUEST	2023-10-19			---
LA	GEM-BOOKS	2023-08-20	1-866-8484-8282	info@gem-books.com	---
GC	GEM-CAR	2023-08-20	1-866-848-8282	sales@gem-car.com	---
JS	JOHN SMITH	2024-01-09			---
NAPA	NAPA	2023-10-19			---
01122	OLIVIER BRUNEL	2024-01-09			---

Buttons: CLOSE, , , ,

Total: 8

Annotations:

- 1: Red arrow pointing to the 'SUPPLIERS' menu item.
- 2: Red box around the '+ NEW' button.

05.3

ENTER ALL INFORMATION

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

Suppliers - JOHN SMITH

INFO <<<<< 1

Code ⓘ Name Status Language Currency ⓘ Created Last Update

JS JOHN SMITH Active French USD 2024-01-09 2024-01-09 03:45 pm

Address Address2 City Country State ZIP code

125 Worth Street Address2 New York United St: New York 10013

Phone Fax Email Website Business hours

123-456-7890 123-456-7890 jss@parts.com Website Business hours

Pay to ⓘ # assigned by provider Secondary business number Labels ⓘ

Write to see suggestions # assigned by provider Secondary business number No items available

+ NEW Contacts associated with this provider

Add or administer the contacts associated with this provider.

NAME	TYPE	TITLE	EMAIL	PHONE	CELLULAR	FAX
------	------	-------	-------	-------	----------	-----

Logo

CHOOSE FILE

ⓘ = Required fields
 ⓘ = Contextual help available as a tooltip

CLOSE SAVE <<<<< 2

CURRENT HISTORICAL STATEMENT

+ NEW

05.4

TERM CONFIGURATION

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

Suppliers - JOHN SMITH

INFO ATTRIBUTES **TERMS** PURCHASES PRODUCTS & SERVICES DOCUMENTS

Credit Term Rebate (%) -> Number of days Purchase account Bank payment account Average payment term

0,00 0 0,00 0 5001 - PURCHASE 1001 - BANK 0

Branch number (Transit) Bank number Account number Transaction labels Tax rules Minimum payment term

Branch number (Transit) Bank number Account number No items available Use default settings / aut 0

Federal tax Validated ... # Provincial tax Validated ... Last invoice date Last unpaid invoice date Maximum payment term

Federal tax Validated on # Provincial tax Validated on 2024-01-09 0000-00-00 0

☒ Refer to boss

☐ Do Not Pay This Supplier in lot payment

1

2

CLOSE SAVE CURRENT HISTORICAL STATEMENT

+ NEW

05.5 COMPILATION OF PURCHASE INVOICES

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

Suppliers - JOHN SMITH

INFO ATTRIBUTES TERMS MARKETING PURCHASES PRODUCTS & SERVICES **DOCUMENTS**

+ NEW Documents associated with this provider
Add or administer the list of documents associated with this provider. All documents generated for this provider are automatically added to this list.

TITLE	LABELS	CREATION DATE	
Purchase reception 16.pdf	---	2024-01-09 03:45 pm	

= Document signed by recipient
 = Waiting for signature
 = Required fields
 = Contextual help available as a tooltip

CLOSE SAVE

CURRENT HISTORICAL STATEMENT

01122 OLIVIER BRUNEL 2024-01-09

CLOSE

Dashboard Suppliers Suppliers - JOHN SMITH

Total: 8

+ NEW

CONFIGURE LINKS FOR PURCHASING PARTS FROM A SUPPLIER

06

Discover all the benefits of the best automotive workshop software in the country.

06.1

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.

Internet Catalog  EN      **TECHNICIAN #4**
Superior Solutions Accounting - ...

List of GEM-LINKS Extension Parts Suppliers

SUPPLIER	NAME	LABELS	CATEGORY FOR PARTS	PRODUCT FOR LABOR LINES	LOGO
CARQUEST	CARQUEST	---	200 - PARTS	WBLAB -	
Identifix	Identifix	---	200	WBLAB -	
NAPA Canada	NAPA Canada	Car	200 - PARTS	WBLAB -	
Napa USA	Napa USA	---	200 - PARTS	WBLAB -	

1  **CLICK ON THE SETTINGS TAB**

2  **+ NEW**

Dashboard Suppliers Internet Catalog

06.2

SUPPLIER CONFIGURATION

COMPLETE THE DATA FIELDS AND CLICK ON **SAVE**.

The screenshot displays the 'Internet Catalog - Napa USA' configuration window. The window is titled 'Internet Catalog - Napa USA' and has a close button (X) in the top right corner. The window contains the following fields and buttons:

- Supplier**: A dropdown menu with 'Napa USA' selected. A red box highlights the 'INFO' button next to it, with a red arrow pointing to it and a circled '1'.
- Name**: A text field with 'Napa USA' entered. An 'Active' dropdown menu is next to it.
- Username**: A text field with 'Demo' entered.
- Password**: A text field with '*****' entered. A red eye icon is next to it.
- Business code**: A text field with 'Business code' entered.
- Margin**: A text field with '40,00' entered.
- Labels**: A dropdown menu with 'Click to select' selected.
- Category for parts**: A text field with '200 - PARTS' entered. A red box highlights the 'SAVE' button next to it, with a red arrow pointing to it and a circled '2'.
- Product for labor lines**: A text field with '232542415 - KIT' entered.

At the bottom of the window, there are buttons for 'CLOSE', 'SAVE', and a red '+ NEW' button. A legend at the bottom left indicates that a red 'i' icon means 'Required fields' and a blue 'i' icon means 'Contextual help available as a tooltip'.

06.3

SETTING OPTIONS

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

Internet Catalog - Napa USA

INFO **OPTIONS**

1

- ☒ Automatic login
- ☒ Used by Default (Button in POS)
- ☐ Auto push to point of sale when reaching the cart page
- ☐ Auto close tab after pushed to point of sale
- ☐ Empty cart after transfer
- ☐ Default labour guide
- ☐ Show part quantity in GEM-CAR inventory

! = Required fields
? = Contextual help available as a tooltip

CLOSE **SAVE**

2

HOW TO CREATE A NEW CUSTOMER

07

Discover all the benefits of the best automotive workshop software in the country.

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.

GEM-CAR

TECHNICIAN #4
Superior Solutions Accounting - DEMO-1
Kevin Administrator

- DASHBOARD
- POINT OF SALE
- TIME CONTROL
- CALENDAR
- VEHICLES
- SALES
- PURCHASES
- INVENTORY
- CLIENTS**
- CASHING
- REVIEWS
- TRACKING
- PAYMENT PLEDGES

Clients

You are currently viewing the client and prospect list.

Search...

▼ Status: Active

CODE	NAME	CREATED	PHONE	EMAIL	ACCOUNT OWNER	TYPE	LAST ACCESS	WORKSHOP
8028630079	Andy Scott	2023-11-08 01:04 pm			Équipe support	Client	---	---
12548	Anne Windsor	2024-01-09 03:51 pm		annew@gmail.com	Équipe support	Client	---	---
8601038-copy	Connie King	2023-12-26 03:20 pm	802-860-7308	vtgutch@gmail.com	Équipe support	Client	---	---
8601038	Connie King	2023-10-19 03:59 pm	802-860-7308	vtgutch@gmail.com	Équipe support	Client	---	---
CCC	Counter Customer	2023-08-20 09:08 pm			---	Client	---	---
8601037	CRAIG GUTCHELL	2023-08-22 10:33 am			Équipe support	Client	---	---
-	Default client	2023-08-20 09:08 pm			---	Client	---	---
0158975	Eddy Bunet	2024-01-11 03:58 pm			Équipe support	Client	---	---
HJ	Herman Jones	2024-01-23 08:00 am			Équipe support	Client	---	---
12	john autocure	2023-10-23 06:58 am			Équipe support	Client	---	---
JW	JOHN SMITH	2023-08-22 08:50 am		kking+5@v2v.ca	Équipe support	Client	---	---
KW	Julie Windsor			jjw@gmail.com	Équipe support	Client	---	---
	Kate Windsor				Équipe support	Client	---	---

CLICK ON THE SETTINGS TAB

+ NEW

07.2

CUSTOMER INFORMATION

COMPLETE THE **INFO** DATA FIELDS, AND CLICK ON **SAVE**.

Clients - Add

INFO <<<<< 1 ATTRIBUTES TERMS SELLERS MARKETING SUBSCRIPTIONS NOTES SALES DOCUMENTS SECURED FOLDERS PRICES

PROJECTS VEHICLES LOG

Code ⓘ ⓘ	Name ⓘ	Mode	Status	Language	Currency ⓘ	Created	Modified
Code	Name	Personal ▾	Active ▾	English ▾	USD ▾	2024-01-24 12:20 pm	2024-01-24 12:20 pm
Address		Address 2		City	Country	State	ZIP code
Address ⓘ		Address 2		City	United St: ▾	Vermont ▾	ZIP CODE
Phone	Cellular	Fax	Email	Bill to ⓘ		S.I.N.	
Phone ⓘ	Cellular ⓘ	Fax	Email ⓘ	▾		S.I.N.	
Birth date	Sex/gender	Work Tel	Club number	Expiration date			
Birth date	Man ▾	Work Tel	Club number	Expiration date			

ⓘ = Required fields
 ⓘ = Contextual help available as a tooltip

CLOSE SAVE <<<<< 2

07.3 CONFIGURATION OF CUSTOMER TERMS

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

Clients - Add — ×

INFO ADDRESSES ATTRIBUTES **TERMS**  1 MARKETING SUBSCRIPTIONS NOTES SALES DOCUMENTS SECURED FOLDERS PRICES

PROJECTS VEHICLES LOG

Credit	Term	Administration fees ?	Rebate (%) ?	-> Number of days	Average payment term ?
0,00	0		0,00	-> Number of days	0
Default revenue account ?	Checks account ?	Transaction labels	Tax rules ?	Minimum payment term	
	1001 - BANK	No items available	Use default settings / auto-assign	0	
Last invoice date	Last unpaid invoice date	# Federal tax	# Provincial tax	Maximum payment term	
Last invoice date	Last unpaid invoice date	# Federal tax	# Provincial tax	0	

☐ This client can pay with receivables

☐ Allow to be selected as "Bill to"

☐ Refer to accounting

☐ Refer to supervisor

☐ Excluded from bulk invoice sending

☐ Do not create invoices with zero rates

2  **SAVE** 

07.4

NEW VEHICLE REGISTRATION

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

Clients - Julie Windsor

INFO ADDRESSES ATTRIBUTES TERMS SELLERS MARKETING SUBSCRIPTIONS NOTES SALES DOCUMENTS ¹ SECURED FOLDERS

PRICES PROJECTS **VEHICLES**  **1**

+ NEW     **2**

CLIENT	SERIAL NUMBER / VIN	TYPE	YEAR	BRAND	MODEL	COLOR	TRANSMISSION	TRANSMISSION TYPE	FUEL TYPE	VEHICLE NUMBER	PLATE NUMBER	CREATION DATE	WOI
JW - Julie Windsor	4854646	Auto	2015	CITROEN	C4 II Picasso (Phase I, 2013)		Automatic	FWD	Gasoline			2024-01-19	---

 = Vehicle for sale or rental
 = Vehicle in garage at the moment
 = Inactive

Storage
Storage linked to vehicles belonging to this customer

CODE	CLIENT	DATE	VALUE	# SALE	VEHICLE	NOTE

 = Empty
 = In storage
 = On the customer's vehicle
 = Closed / returned to customer

 = Required fields
 = Contextual help available as a tooltip

CLOSE SAVE     

 CURRENT HISTORICAL STATEMENT

07.5

VEHICLE INFORMATION

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

Vehicles - CITROEN — ×

INFO ←←←← 1 NOTES INSPECTIONS MAINTENANCES MONITORING HISTORY DOCUMENTS LOG
VIN(8): 4854646

Client ? !

JW - Julie Windsor × Q

Serial number / VIN ?

4854646

Type !

Auto

Year

2015

Brand ? ! ?

CITROEN

Model ? ! ?

C4 II Picasso (Phase I, 20

Doors (Nb)

4

Color

Color

Transmission

Automatic

Transmission type

FWD

Fuel type

Gasoline

Camera ty...

Productio...

Production d

Date of pu...

Date of purcl

Status

Active

Date of commissioning

Date of commissioning

Vehicle number

Vehicle number

Plate number

Plate number

State/Prov...

Vermont

☐ Do not send invoices for this vehicle to CARFAX

Last visit

Last visit

Odometer ?

0

Odometer ...

Miles

Hours

0

Motor

Motor

Vehicle card number

Vehicle card number

Cylinder

Cylinder

GVWR

GVWR

Summer tire size

Summer tire size

Rear summer tire size

Rear summer tire size

☐ Nitrogen filled tires

☐ Tire pressure sensor

☐ Anti-theft

Winter tire size

Winter tire size

Rear winter tire size

Rear winter tire size

☐ Winter tires currently i...

☐ Wheel lock nuts

Where is the lock nut tool?

Where is the lock nut tool?

Electronic passcode

Electronic passcode

Location of the valet key

Location of the valet key

! = Required fields
? = Contextual help available as a tooltip

CLOSE SAVE AND CLOSE ▲ ←←←← 2

POINT OF SALE

08

Discover all the benefits of the best automotive workshop software in the country.

08.1

POINT OF SALE

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

Point of sale - Estimate

SALE PURCHASES NOTIFICATIONS COMMISSIONS DOCUMENTS LOG

Client Use default client
Write to see suggestions Step 1 - Estimate Bill date Expected Client arrived Completed at Invoice # Devis #
Write to see suggestions Bill date 2024-01- HH:MM HH:MM HH:MM Invoice # Write to see suggestions

Created by T4 - TECHNICIAN #4 Terms Club number Purchases Labels Title P.O. #
T4 - TECHNICIAN #4 Terms Club number Click to select Title P.O. # CARFAX Mitchell

Vehicle Write to see suggestions Year Color Mileage Out Plate number Serial number / VIN Vehicle # Tires Motor Cylinder Card #
Write to see suggestions Year Color Odometer Out Write to see suggestions Write to: Tires Motor Cylinder Card

NO.	ITEM	DESCRIPTION	QUANTITY	PRICE	REBATE (%)	TOTAL

= Jobs to do = Added from time control = Proposed and reported/refused = Expected time exceeded = An error is present on this line

Write to see suggestions Description - 1 + 0.00 % 0.00 \$ 0.00

F5+ Add F6- Delete F7 Parts CARQUEST
Jobs Packages Vehicles Tires Fuel Reminders

Message on invoice

Parts 0.00 Subtotal 0.00
Service(s) 0.00 Total 0.00

F12 x Exit Time control F1+ New sale F9 Calendar F10 Checkout Maintenances Car lot Storage Follow-ups Returns Receivables History Duplicate Reverse Subdivide Shop Help Delivery F11 + Work order F3 + Devis F4 Payment

RESEARCH METHOD

Point of sale - Estimate

08.3

KEY LABEL PRINTING

TO PRINT A KEY LABEL, CLICK ON THE  TAB AND THEN CLICK ON THE **PRINTER** TAB.

Point of sale - Estimate

SALE PURCHASES NOTIFICATIONS COMMISSIONS DOCUMENTS LOG

Client  Use default client

Write to see suggestions      Step 1 - Estimate  Bill date 2024-01- Expected HH:MM Client arrived HH:MM Completed at HH:MM Invoice # Write to see suggesti  

Created by  T4 - TECHNICIAN #4   Terms Terms Club number Club number Purchases Labels   Click to select Title P.O. # CARFAX Mitchell

Vehicle  Write to see suggestions   Year Year Color Color M **1** Out   Write to see suggesti Serial number / VIN Vehicle # Tires Motor Cylinder Card #

NO.	ITEM	DESCRIPTION	QUANTITY	PRICE	REBATE (%)	TOTAL
Key tag Generate labels with your configured templates Label templates  Key tag CLOSE   2						

 = Jobs to do
  = Added from time control
  = Proposed and reported/refused
  = Expected time exceeded
  = An error is present on this line

  Write to see suggestions  Description - 1 + 0.00 % 0.00 \$ 0.00

F5+ Add **F6-** Delete **F7** Parts  Message on invoice

Jobs Packages Vehicles Tires Fuel Reminders

F12x Exit Time control **F1+** New sale **F9** Calendar **F10** Checkout Maintenances Car lot Storage Follow-ups **Returns** Receivables History Duplicate Reverse Subdivide Shop Help **Delivery** **F11** + Work order **F3** + Devis **F4** Payment

Parts 0.00 Subtotal 0.00
 Service(s) 0.00 Total 0.00

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