

Boatyard Update - Release Notes (15/09/2022)

Boatyard - Update 15/09/2022

- Fixed postcode lookup not obeying the "Address to upper case" setting.
- Improved ClearAccept integration to allow cancelling of payment from within GDS.

Boatyard - Update 31/08/2022

- Updated postcode lookup service to ensure data is more up to date on a regular basis.
- SMS and VRM credits can now be purchased directly in GDS.

Boatyard - Update 15/06/2022

- Fixed some UI layout issues.
- Fixed an issue where VHC templates may not correctly sync with eVHC app.

Boatyard - Update 12/04/2022

- Added more Boat data fields which can be found on the Boat Details tab of the boat record.
- Boat names are now no longer a unique field, the system can now handle multiple boats with the same name, in order for the system to understand which boat you are referring to Boat Name fields are now locked and require use of the browse "..." button to locate the correct boat.
- Added support for new Boatyard eICS app for Inspection Check Sheets.
- GDS Boat Manager has gone through a rebrand after Garage Data Systems Ltd was purchased by ClearCourse LLP, GDS Boat Manager will now be known as Boatyard.

GDS Boat Manager - Update 06/01/2022

- Fixed issue with Add Parts to Sales when part column is blank

GDS Boat Manager - Update 22/11/2021

- Fixed an issue with MOT and Tax lookup where dates returned could be incorrect if the vehicle reg match a date format used by DVLA e.g. FEB 2021
- Postcode lookup will now notify if its database is out of date.
- Purchase invoices can now be searched for using 'Our Ref' on the document finder screen.
- Updated graph screen to ask which printer you want to use rather than using system default.
- Updates to superseding, it will now search for the newest superseded part e.g. A superseded by B superseded by C, when adding A system will update to C
- Nominal reports will now correctly filter by branch/departement code which will be displayed on the report.
- Added a Ultra Low Emission Zone (ULEZ) Compliant checkbox to vehicle record which will be displayed on jobsheets and invoices.

GDS Boat Manager - Update 21/07/2021

- Improved syncing process for eVHC.
- Fixed some issue with GaragePay sync messages not being removed.
- Fixed parts import setting cost to 0 if the column was not provided in the CSV.
- Emailing multiple invoices from the customer record screen will now send all invoices in a single email instead of an email per invoice.

GDS Boat Manager - Update 07/07/2021

- Improved messaging when syncing with GaragePay and eVHC services
- Customer records now have a new tab called "Emails" which will allow you to specify an email address for each document type. If none is set or it is not a valid email it will revert to the main email on record.
- Added a new option under the Reminders dropdown called "Send Statements" this tool will allow you to mass send customer statements via email

GDS Boat Manager - Updated 20/05/2021

- Added support for ClearAccept payment terminals in addition to Paymentsense, the original Paymentsense settings tab is now labelled "Payment Terminal"
- GDS is excited to announce a major update to our market leading platform: introducing our own fully integrated in-house payments acceptance solution – GaragePay! No additional licence cost for GDS customers. View the GaragePay demo here <https://demo.garagepay.com/> and choose the Register / Sign Up button to start using it.

GDS Boat Manager - Updated 19/03/2021

- If the setting "Mobile No. is Numeric Only (no letters allowed)" is enabled you will now be able to enter + to allow for +353 1234 123456 or +44 1234 123456
- A system setting has been added to allow/prevent editing of vehicle notes on bookings
- A system setting has been added to labour line to be ignored from markups
- Statement Reports will now have 'Show Unpaid Only' checked by default and will remember the previous setting if changed.

GDS Boat Manager - Updated 10/12/2020

- Calendar view on bookings diary can now be filtered.
- Update subject heading when email a document to include the type and ID number e.g. "Your Invoice is attached (Invoice 12345)", the attached file will also be named Invoice_12345
- Added integration tools for Xero, Quickbooks and Sage Business Cloud Accounting, Please contact support to activate these tools.
- Improved Xero CSV export.

GDS Boat Manager - Updated 9th July 2020

- Improved SageLink syncing processes.
- Added ability to cancel bookings. For more information please visit our support pages. (<https://gdshelp.co.uk/guides/how-to-cancel-a-booking-in-gds>)
- Suppliers can be assigned to jobsheet details lines, this can be enabled via system settings on the "Sale Documents" tab and checking the "Show Supplier column on Jobsheets" checkbox.
- Tax Due will now update on jobsheets when performing a Tax and MOT lookup, this will then be saved back to the vehicle record.

GDS Boat Manager - Updated 2nd June 2020

- Added support for new HMRC MTD updates

GDS Boat Manager - Updated 29th May 2020

- An update has been made to the Reminder Date updater tool to allow for a date range and a rollback feature to undo previous changes.
- Updated booking hours when using mechanic on lines. The booking hours section will now list all mechanics associated to the booking for each day. This will allow you to better manage your mechanics time.

- Mobile Number can now be made visible on all customer document lists. Jobsheets, Invoices etc.

GDS Boat Manager - Updated 16th April 2020

- Improved some error messages that could cause some confusion.

GDS Boat Manager - Updated 15th April 2020

- Fixed an issue where machine on local connection was reporting as remote connection and incorrectly posting a message that remote connections were not allowed.

GDS Boat Manager - Updated 14th April 2020

- Added the ability to mass update vehicle reminder dates, more information is available on our support pages.
(<https://gdshelp.co.uk/guides/covid19-mot-extension>)
- Fixed an issue where suppliers email address would not be automatically entered when emailing Purchase Orders.
- Improvements to remote connection to better handle dynamic IP addresses
- Improved stock control on bookings if parts get allocated to a booking via the 'Order Parts' tool
- VAT reports now allow you to choose date method giving you access to more detailed reports, if the date is different to the one used to do your VAT Return a warning message will appear.
- Improved archived document filter to allow filtering by status.
- Improvements to prevent out of maintenance messages when not out of maintenance.

GDS Boat Manager - Updated 2nd April 2020

SageLink updates to improve sage data transfer process

GDS Boat Manager - Updated 19th March 2020

General bug fixes and performance improvements

We have made some updates to MTD to comply with HMRC Fraud Prevention policies.

Online Calendar syncing with Google and Outlook is now available to all customers with a current support agreement, more information is available on our support pages.
(<https://gdshelp.co.uk/guides/online-calendar-integration>)

GDS Boat Manager - Updated 17th February 2020

General bug fixes and performance improvements

Credit Limit

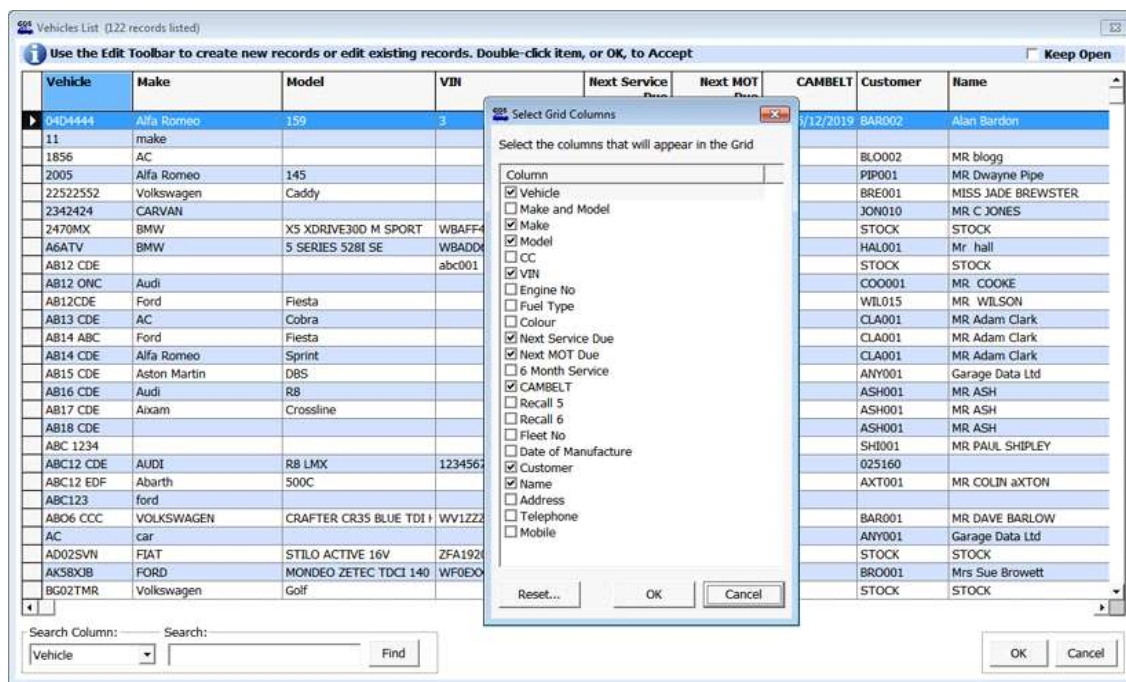
Customers can now have a Credit Limit assigned to their account, once this limit is exceeded a notification will popup when viewing the customers record or when creating a sales invoice for that customer, this popup can be disabled via the systems settings by unchecking "Display warning when Credit Limit is exceeded" on the "Customers" tab.

GDS Boat Manager - Updated 18th December 2019

General bug fixes and performance improvements

New feature to allow customising the columns which are displayed on Grids

A new feature has been added which allows users of the system to configure which columns are displayed or hidden on the data grids.
 e.g. on the Vehicles List, you can choose to show or hide Customer Mobile Number, Address, Engine No, Vehicle Colour and many other options
 To use this feature, just right click on the grey heading row at the top of the grid to display the Select Grid Columns screen.
 Tick to set a column to be shown, and untick to set the column to be hidden, and then click OK to save the settings.
 Most screens in the system support this new customising functionality. This facility can improve the speed at which you can access information in the system, and it will enhance any customised reporting you might do when exporting grids to Excel via the Excel spreadsheet export feature.
 The customising grids feature can be switched off by setting a user permission, if access to this feature needs to be limited.



GDS Boat Manager - Updated 21st November 2019

General bug fixes and performance improvements

Improved data grid export to export directly to a native Excel xls or xlsx file which can be opened in excel or open office

GDS Boat Manager - Updated 21th October 2019

General Bug fixes and performance improvements

GDS Boat Manager - Updates 23rd July 2019

General Bug fixes and performance improvements.

GDS Boat Manager - Updates 11th June 2019

General Bug fixes and performance improvements.

The ability to Export and Print has been added to jobsheet, invoice and estimate lists. If you have the vehicles sales module the lists on all four tabs will also be exportable. The Export option will allow you to export the list to a CSV text file.

If GDS loses connection to the server it will attempt to reconnect if this is not possible it will log you out of the system. Upon logging in after a disconnect GDS will attempt to restore any windows that had been closed. unfortunately due to the nature of the Edit mode data entered before losing connection may be lost.

GDS Boat Manager - Updates 6th March 2019

General bug fixes and performance improvements.

After a prolonged sign off period from HMRC our Making Tax Digital (MTD) implementation has been released with this update.

Creating new parts from a Purchase Order or Purchase Invoice will now correctly take the details of the assigned supplier if one has been assigned before creating the part.

We have fixed an issue when added additional part to a purchase invoice that has been generated from a purchase order.

GDS Boat Manager - Updates 04th February 2019

General bug fixes and performance improvements

GDS Boat Manager - Updates 18th January 2019

General bug fixes and performance improvements.

Improved GDS backup facility to take more snapshots.

Updated Marketing Module to make better use of GDPR and Optly communication rules.

Fixed an issue where AudatexLink would fail to connect.

Fixed an issue creating job cards in SmartView when converting from a booking to jobsheet.

GDS Boat Manager - Updates 28th November 2018

A system setting has been added to disable the "booking converted" warning when editing a booking.

A user setting has been added to hide customer details on screen to help improve GDPR compliance.

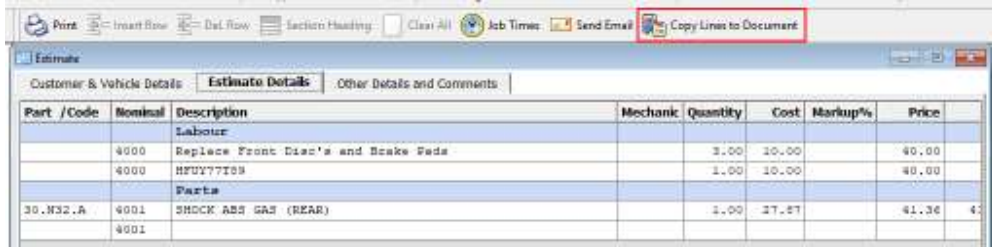
VMS Software has updated their Optly Platform. The updates include a new Marketing tool which if enabled on your Optly account will allow GDS to be able to sync basic vehicle data including Reg, Make, Model and the six follow up dates. These can then be used as filter options within the Optly Marketing tool

With the trend moving towards using newer security protocols, GDS has been updated and test to allow use of the most recent versions of the TLS (Transport Layer Security) security protocol allowing GDS to operate on servers where TLS version 1.1+ are enforced allowing GDS to run while still maintaining PCI DSS compliance (which some credit card companies require).

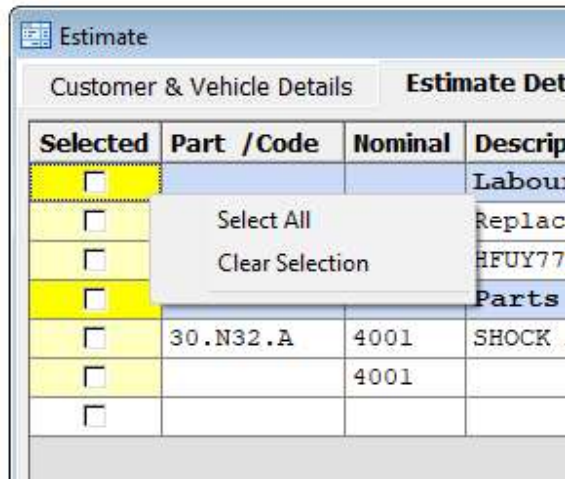
GDS Boat Manager - Updates 1st October 2018

Along with general bug fixes and performance improvements this version comes with a new feature allowing you to select specific lines from an estimate and create a jobsheet or invoice from those lines.

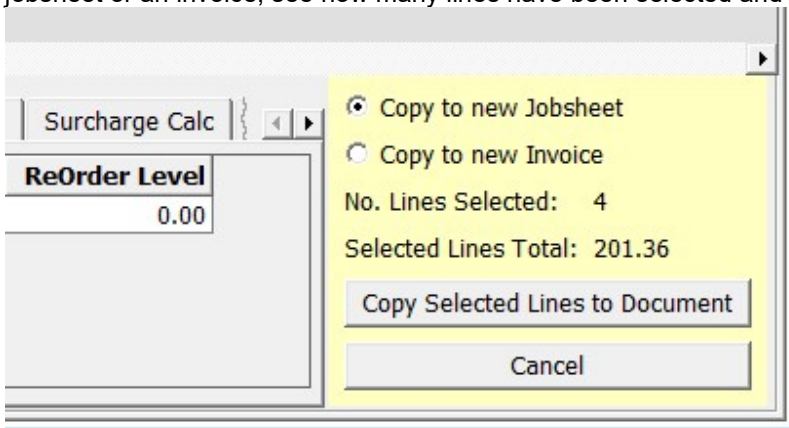
When on the grid of an open Estimate a new button will appear in the toolbar



Upon clicking this button the page will change displaying a new column with tick boxes allowing you to select the lines you want to be copied across to the new document. Ticking a section header will select all items under that heading, right clicking on the column will display a popup menu with the option to select all lines or clear the current selection.



With the control box which appears in the bottom right you can choose whether the document will be a jobsheet or an invoice, see how many lines have been selected and the total value of those lines.



A warning will now be displayed when editing a Booking that has been converted to either a Jobsheet or an Invoice.

Right clicking on a column when viewing Customer, Vehicle or Parts lists you will now be given option to copy the value to the clipboard.

Customer records have a new tab added labelled "Statement" this tab will show a 12 month break down of invoice totals and outstanding balance with the option to print off as a report.

When bringing parts in via Goods Received the parts will correctly be allocated to any parts that are marked as required.

A new improved visual calendar view has been added to the booking diary.

EReminders has been improved to handle SMS or Emails which GDS was unable to send, these will now be highlighted in red and continue to send the rest of the list.

GDS Boat Manager - Updates 10th September 2018

Due to a bug in a recent Windows 10 update GDS client systems are no longer able to remotely trigger the Secure Cash Drawer. This update will fix this issue please ensure all system are up to date.

Please visit <https://www.gds.co.uk/cash-drawer-module/> for more information on our Secure Cash Drawer Module.

GDS Boat Manager - Updates 20th August 2018

This update includes some general bug fixes and improvements.

Some additional user permissions have been added to provide more control over what additional user can do. These include individual permissions for creating credit notes for sales and purchases as well as a new permission for editing estimates.

Paymentsense can now be used from the Sales Ledger allowing you to take a single payment to pay off multiple invoices.

SmartView Electronic T-Card system by VMS Software Ltd has been integrated with GDS to allow for automatic sending of Jobsheets to SmartView. Please see www.vms.co.uk for more details on the SmartView system

GDS Boat Manager - Updates 16th July 2018

GDS has moved to new premises.

Our new address:
Garage Data Systems Ltd
Armstrong House
Flemingate
Beverley
HU17 0NW

GDS Boat Manager - Updates 4th July 2018

This update includes some changes to the Reminders list print out to include opt in details for Post and Phone.

Job / Booking details panel on Jobsheets and Invoices is now responding to window resizing again, a new button has been included to allow you to give the box a little more horizontal space if required.

GDS Boat Manager - Updates 26th June 2018

This update sees some improvements to data cleansing, and a fix for an issue which could prevent a customer from being cleansed, it is recommended that you re-run the data cleanse.

This update sees some new data cleansing tools for mass consenting customers that you have already received consent details for and finding and fixing customer references that are no longer compatible with Sage 2018.

Some new user permissions have been added to allow for better control over who can and cannot send emails and SMS messages from within GDS.

Some new labels have been added to jobsheet, invoice, booking, SMS and emailing screens to easily identify if a customer has accepted consent.

GDS will now sync with Optly at more regular intervals to help ensure customer preferences are up to date.

There have also been some general bug fixes and performance improvements.

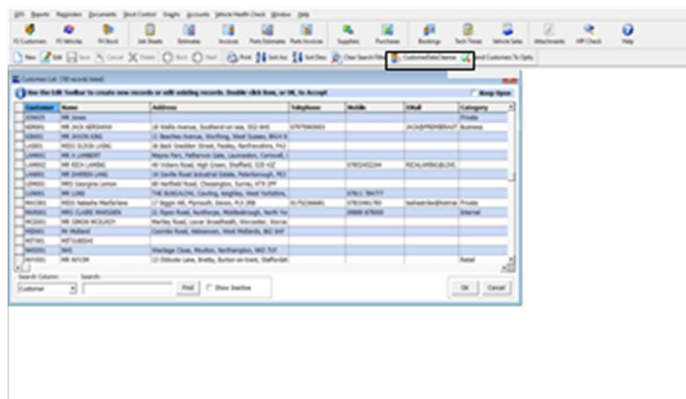
GDS Boat Manager - Updates 16th May 2018

With the new **General Data Protection Regulation** (GDPR) becoming law later this month we have added some new features to the system.

Data Cleanse

There is now a new data cleanse facility. Part of GDPR is not keeping personal data longer than necessary. The cleanse facility will allow you to remove the customer's personal data from documents of customers you have not seen for a long time.

There is now a Customer Data Cleanse button on the customer screen.



Display the customers with no activity in a period, you can choose to keep the data of certain customers by ticking the box. Once the data is cleansed it will remove all personal data from the customer record and associated documents. The system will retain the customer reference number so you can re-create the customer if they return in the future and you have their written consent to do so.

Data Cleaning

Select Customers with no activity since the given Months and click Display to show the Customers.

Record Selection Criteria
 Display all Customers with no activity in the last 36 Months. Display the Records Cleanse the data

Checking the keep box will keep their data on your system, all customers left unchecked will be cleaned removing all personal data from the customer record and associated documents.
 Displaying 5 Customers, 0 to keep, 5 to cleanse

Keep	Customer	Name	Address	Contact	Telephone	Fax	Mobile	Work Telephone
<input checked="" type="checkbox"/>	C00001	Michael Connor	22 Westfield Road, SC35 1		01234 56789		07752 212012	
<input checked="" type="checkbox"/>	C00002	Sarah Connor	18429 Victoria Street, L6 7		Telephone	Fax	mobile	work phone
<input checked="" type="checkbox"/>	SMB003	MR John Smith	1 Fake Street, Fakenham, I		01234 567890		07123 456789	
<input checked="" type="checkbox"/>	JET005	Peterson	10-17 Edward Street, Man	CONTACT NAME CD 01222 606350 TEL			0772438882	WORK PHONE SCOR

Customer Record

The system now has settings to disable sending communications to customers until consent to do so is obtained.

Some extra tick boxes have been added to the customer record,

Customer Comms Requested – Consent from the customer has been requested.

Customer has Opted In – You have written consent from the customer to hold and process their data.

Inactive Customer Account

Customers

Customer Ref: JKL008 ☐ Cash Account

Customer Type: ☐ Customer Comms Requested ☐ Customer has Opted In

☐ No Marketing ☐ Customer does not want any SMS Text Messages

VAT Number:

Enquiry Source:

☐ Internal Customer Account (zero rated, internal use only)
☐ Lease Company (show on Lease Company list)
☐ Finance Co. (show on Car Sales Finance Co list)
☐ Inactive Customer Account

Finance:
 Labour Rate:
 Turnover: 0.00
 Credit Terms: 0 Days ☐ On ☐ Stop
☐ No VAT Charged
 Default Discount: %
 Parts Sales Price: Parts Disc Code:
 Discount Matrix:
 Sales Rep:

Reminder Communication Methods:
☐ Send SMS Text Message
☐ Send Email ☒ Send Letter

Associated Vehicles | Sales History | Estimates | Booking History | Related Purchases | SMS Text Messages | Emails | Attachments

Vehicle	Make and Model	CC	VIN	Engine	Next Service Due	Next MOT Due	Notes
SD60HCK	SKODA OCTAVIA S TD 1896		TM805212482048	BOX 008623			

The system has a new warning symbol on the reminders to show consent has not been obtained from the customer and therefore you should not send communications to them.

Customers

Customer Ref: JKL008 ☐ Cash Account

Customer Type: ☐ Customer Comms Requested ☐ Customer has Opted In

☐ No Marketing ☐ Customer does not want any SMS Text Messages

VAT Number:

Enquiry Source:

☐ Internal Customer Account (zero rated, internal use only)
☐ Lease Company (show on Lease Company list)
☐ Finance Co. (show on Car Sales Finance Co list)
☐ Inactive Customer Account

Finance:
 Labour Rate:
 Turnover: 0.00
 Credit Terms: 0 Days ☐ On ☐ Stop
☐ No VAT Charged
 Default Discount: %
 Parts Sales Price: Parts Disc Code:
 Discount Matrix:
 Sales Rep:

Reminder Communication Methods:
☐ Send SMS Text Message
☐ Send Email ☒ Send Letter

Associated Vehicles | Sales History | Estimates | Booking History | Related Purchases | SMS Text Messages | Emails | Attachments

Vehicle	Make and Model	CC	VIN	Engine	Next Service Due	Next MOT Due	Notes
SD60HCK	SKODA OCTAVIA S TD 1896		TM805212482048	BOX 008623			

Reminders

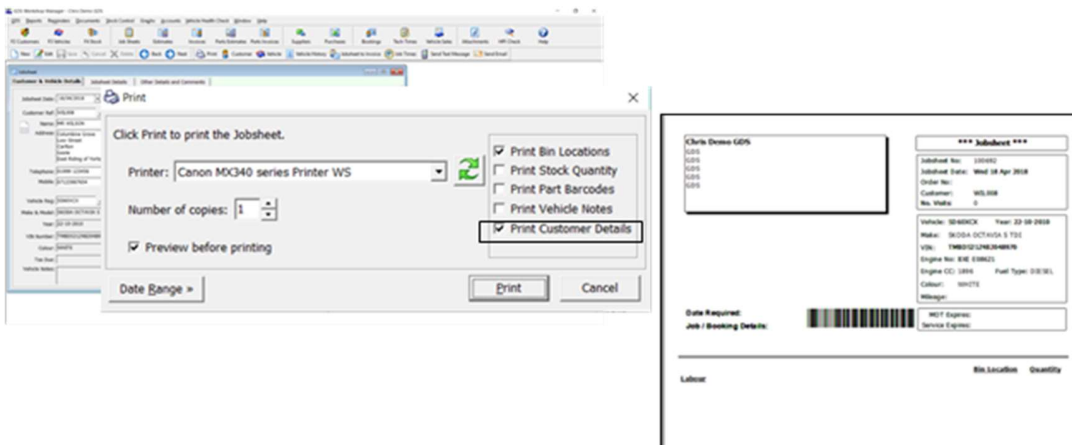
When processing reminders the system will only show the customers with the Opted in box ticked. There

is a tick box to display the customers that are due a reminder but you have not opted in as yet.



JobSheets

When printing a jobsheet there is now an option not to print the customer's personal details.



System Settings

In the system settings- GDS> Configuration Settings > GDS System Settings there is a new tab GDPR / Data Protection.

There is an editable Data Processing / Opt in statement that be printed on a jobsheet to obtain consent to processing the personal data and communicating with a customer.

There are also setting to switch off any off these updates. (Not recommended if you wish to be compliant with the GDPR law)

GDS Paymentsense Integration

Paymentsense Integration within GDS.

Paymentsense is Europe's largest merchant services provider. GDS has recently partnered with Paymentsense to provide an integrated payments system within the GDS system and to secure our customers with better card processing fee's than they are likely receiving with their current card terminal provider.

Please see our Blog post on our website for more information:

<https://www.gds.co.uk/2018/04/09/gds-enter-into-partnership-with-paymentsense/>

Case Study:

We worked with our long-standing customer this morning, William Street Motor Services in Cleethorpes. By switching them to Paymentsense we have secured them a saving of approximately £360 per year, and we have sent them £100 rebate from their annual support & updates cost which they recently renewed. We pass our best wishes to Chris and Sue there, and we look forward to helping more customers save money by switching in the future.

GDS Boat Manager - Updates 12th February 2018

This update includes general bug fixes and performance improvements.

In this update we have improved the SMS message template tool to allow you to make better use of the new SMS system allowing for larger SMS messages.

A new system setting has been added which will now allow you to turn off the new duplicate Serial/Chassis number check which was added in the previous update

GDS Boat Manager - Updates 22nd December 2017

This update includes a bug fix which was causing vehicle sales invoices to be incorrectly marked as paid, and crediting surcharges now obeys the customer no VAT flag, there have been a few minor updates to display additional information on screens that have been a popular request.

- Reminder dates are now visible at the end of the bookings grid.
- Column sorting has been added to the Sales/Purchase Ledger so that you can now sort the data in those grids.
- Invoice payment screen will now inform you of any money that the customer has available on account in the "Available" box.
- There is a warning when saving a boat that will inform you if the Serial/Chassis number already exists on your system.
- Mileage warning on jobsheets can now be turned off individually from sales invoices.

GDS Boat Manager - Updates 15th November 2017

Fixed issues that have been reported.

New - Support for an upcoming Online Booking System release has been added these will activate when the Online Booking System has been released and installed.

Car Sales invoice print outs now display an Outstanding value along with the option to print out payments that have already been made.

The redundant stock report will now inform you of the value of the redundant stock.

Document list auto refresh has been improved to prevent you from losing any selections you have made while still refreshing the list with new items.

GDS Boat Manager - Updates 13th June 2017

This version includes several bug fixes and performance improvements.

The Marketing Module has received some new updates in this version to allow for better filtering of Boats and Engines

Invoices have also been updated to allow printing of part Bin Locations to the invoice.

GDS Boat Manager - Updates 8th May 2017

We have fixed an issue where deleting blank rows on purchase invoices could cause GDS to close unexpectedly.

We have improved our Xero export to help avoid issue with blank rows being imported in to Xero which was stopping some users from submitting draft invoices for approval.

GDS Boat Manager - Updates 26th April 2017

We have fixed an issue in Sage Link that would cause Foreign Currency errors for our customers whose main currency is not Pounds Sterling.

We have fixed an error in Repair Times which could cause the software to close unexpectedly.

GDS Boat Manager - Updates 3rd April 2017

This version includes bug fixes and performance improvements along with a much need SMS text upgrade.

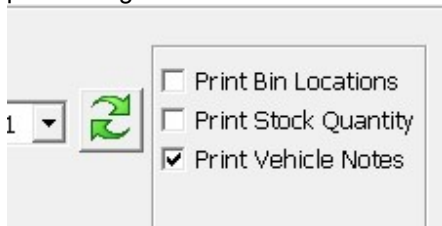
SMS Upgrade

With this new update we will be increasing the minimum text message size from 160 characters to 918, this should bring the system in line with more current technology that support multi message systems. Longer message cost more to send so to aid this we have added additional helper text that will let you know how much the SMS text message is going to cost in credits before you send it out, this includes sending SMS reminders where the system will notify you how many credits it will cost to send out all your messages and whether you will have enough before you send them. Due to this system using more credits we have made the decision to reduce the cost of buy credits from us, these new prices can be found on the "check SMS Credit Balance" screen.

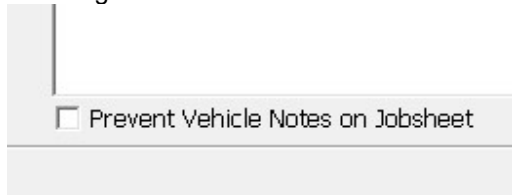
Vehicle Notes on Jobsheets

We have added a new system setting allow you to set whether to display vehicle notes on Jobsheets or not, this can be found in the system settings under "Printed Documents" -> "Print Vehicle note on

Jobsheets", this can also be set at time of printing by checking the "Print Vehicle Notes" option on the print dialog.



Vehicle Notes can also be completely prevent from printing on the Jobsheet via the vehicle record by checking the Prevent Vehicle Notes on Jobsheet option under the Notes box on the Vehicle record.



Under Selling Your Self

We have had a few calls regarding this new feature that was released in the last update but was lost at the bottom of the update notes.

Some of you may have noticed that on your invoices the rate column may go yellow.

Quantity	Cost	Rate	I
1.00	2.40	1.00	

This was designed to highlight when you are selling a part or charging labour at or below your cost rate, this can be safely ignored, it is there just to let you know that you are undercharging.

This can be turned off in system settings under "Stock Control / Parts" -> "Check Sell Price > Lowest Cost"

GDS Boat Manager - Updates 10th March 2017

This version fixes an issue where stock levels were reading blank when the part had no movements out, this update also fixes an issue where the selected supplier on the stock management screen was not being passed to the purchase order.

GDS Boat Manager - Updates 6th March 2017

This version includes various bug fixes and performance improvements including an issue that caused the application to run out of memory when GDS contains 10000+ parts. We have also added some new features including a Min Max option for Stock Parts, some improvements to the Stock Management screen and a re-work of the surcharge search tool.

Stock Management

We have made some improvements to the Stock Management screen these include improving the data displayed and adding a view all option to view parts required for jobs and stock at the same time, we have also improved the order creation from this screen so that ordering in parts for stock will correctly take in to

account those parts that are required for jobs and ensure that they are allocated in the order.

Min Max Option for Stock Parts

We have now added the ability to change the stock parts system to use a Minimum and Maximum stock level rather than re-order level and re-order quantity, this change has been flowed in to reorder reports and the stock management screen which will list parts that are below the maximum and highlight those that are below the minimum.

Parts Movement Out

We have made a change to the movements out section on the parts screen that will now allow you to right click a part that is required and allocate it to a movement in if there are movements in available to assign to, otherwise you would be required to buy the part in still.

Date	Status	Issued By
016 16:33:30	Allocated	
016 16:33:30	Required	
016 16:33:30	Required	
016 10:47:20	Required	
017 10:14:56	Allocated	
017 10:14:56	Allocated	

Select TEST PART Batches

Select Batch(es) to use from the list below.

BatchID	Supplier	Unit_Cost	Available
14	CreditNote		4
15	CreditNote		4

Parts to Allocate: 3 Batches Total: 4.00

0.00 Parts are still required.

Use Batch(es) Cancel

New Report Updates

We have made a few changes to some of the reports in the system and also add some new reports. We have added a Redundant stock report under "Reports" -> "Stock Parts" -> "Redundant Stock Report" this will allow you to view parts that are on stock but have not been sold in a time period that you specify. Some accounts reports have a new checkbox option which when checked will include Internal invoices in the reports, this has been added to most accounts reports. We have also added a system setting allowing you to adjust the profit calculation to either be a markup calculation (default) or margin calculation, this can be set via the system setting under "Labour Rate" -> "Calculate profit as Margin"

Surcharge Search

We have made some modifications to the Surcharge search tool the menu option has been re-named to better describe what it does and is now labelled as "Find Outstanding Surcharges" with this new revision you are now able to credit back multiple surcharges in one go, the system will recognise if multiple surcharges are on a single invoice and create a single credit for them, NOTE an individual credit note will be created per invoice.

To credit surcharges you can now simply enter the amount you wish to credit in the "Qty To Credit" column and press the "Create Credit" button, this will create a credit note for all rows that have a value in the "Qty To Credit" column.

GDS Surcharge Finder

Enter one or more search criteria, select document types to search and click Search

Document No: Customer: ☐ Include Completed

Invoice Details or Part Number:

To find Text or Part Code in a line on a document e.g Clutch or VFL196

**Double-click on a document to open it.
Enter the amount to credit on each line you want to credit.**

Search Results - 3 documents found.

Doc ID	Doc Date	Part	Quantity	Credited	Qty To Credit
29201	11/10/2016	TEST PART - Surcharge	1.00	0.00	
29196	27/09/2016	TEST PART - Surcharge	1.00	0.00	
29173	16/08/2016	TEST PART - Surcharge	1.00	0.00	

Other Updates

- When a default discount has been added to an Invoice Section Heading / Menu Job the discount will now correctly be applied to all lines associated to that section heading once added to the invoice or jobsheet, the discount will not be calculated on the section heading screen itself.
- We have added the ability to save notes to Purchase Orders and Returns these are not printed anywhere and are just for your records.
- When adding parts to an invoice the system will now warn you if the Rate is less than or equal to the price you purchased the part for. This is controlled by the system setting under "Stock Control / Parts" -> "Check Sell Price > Lowest Cost"
- Additional Line / Surcharges can now be exported/imported using the Part import/export tool.
- Invoice Section Text / Menu Items are now included in the parts dropdown list.
- Each invoice now has the ability to set whether it is "On Hold" or not directly from the invoice screen rather than changing it later on the invoice list screen.
- Surcharges on parts now have the ability to be included in the Stock Valuation Report by checking the new checkbox on the part labelled "Include in Stock Valuation"
- We have fixed an issue where some tech times reports would open a sales invoice instead of the jobsheet when double clicking the jobsheet id.

GDS Boat Manager - Updates 16th January 2017

We have added a few bug fixes identified in the last release.

GDS Boat Manager - Updates 3rd January 2017

Along with the below this update includes some bug fixes and performance improvements

- SMS/Email reminders will now be correctly removed if the Vehicle is deleted from the system.
- When selecting printer profile the system will no longer forget this when using the print preview option.
- When scanning parts to a Jobsheet or Invoice will now correctly populate the newly created row below with the document default info.
- We have fixed an issue when performing a stock adjustment when creating a new part, the part will now be saved for the adjustment is processed then return you back in to edit mode so that no information is lost.

- *(Enhanced Stock Only)* We have added the ability set a fixed Nett/Rate value via the Discount Matrix, this will force the Rate of the part to be set to this regardless of markups or discounts.
- *(Enhanced Stock Only)* We have updated the Surcharge finder under Stock Control to better see which surcharges have been refunded, unfortunately we have not been able to retro actively link previously refunded surcharges in to the new layout, these may still be listed as outstanding.

GDS Boat Manager - Updates 28th November 2016

- Fixed an issue where word wrap on grids would jump to the wrong column if the columns had been rearranged.
- Added the ability to refresh document lists and set an auto refresh timer, this can be activated via the system settings screen under Document Lists -> Show Refresh on Sales Lists.
- When adding stock via stock adjustment screen the cost price will auto fill based on the current cost form the primary supplier.
- We have added the ability to double click lines in movements in to open the related purchase invoice or sales credit note.
- We have added branch filtering to the purchase invoice list screen.
- We have added Parts Estimates which can be converted to Parts Invoices.

GDS Boat Manager - Updates 18th November 2016

Some bug fixes and UI improvements.

GDS Boat Manager - Updates 15th November 2016

We have fixed an issue which would sometimes occur in certain circumstances if departments/branches is enabled, multi branch stock is off and a purchase order was generated by site B and received by site A.

GDS Boat Manager - Updates 11th November 2016

We have fixed an issue which would sometimes occur when adding parts to documents.

GDS Boat Manager - Updates 7th November 2016

We have fixed an issue that caused a crash when setting the Duration on a booking and an issue where part descriptions were not loading correctly on Purchase orders and Returns.

GDS Boat Manager - Updates 3rd November 2016

We added some improvements to the additional line / surcharge on parts so that you can now specify a Nominal and VAT code to the extra line that gets added, we have also ensured that the quantity of the additional line matches the quantity of the parent part when added to the invoice.

GDS Boat Manager - Updates 31st October 2016

This update fixes a few issues highlighted in the previous update. These include but are not limited to, Rates reverting to cost values, Printer selection options not carrying over correctly to the preview window, issues opening archived purchase invoices.

GDS Boat Manager - Updates 25th October 2016

This update contains several bug fixes and performance improvements. We have also added a few new features to improve Parts management including Discount Matrix, Supersession and Alternative parts, and the ability to add an additional line to an invoice when using a

part.

We have fixed an issue where some windows would close even if the "Keep Open" checkbox was ticked.

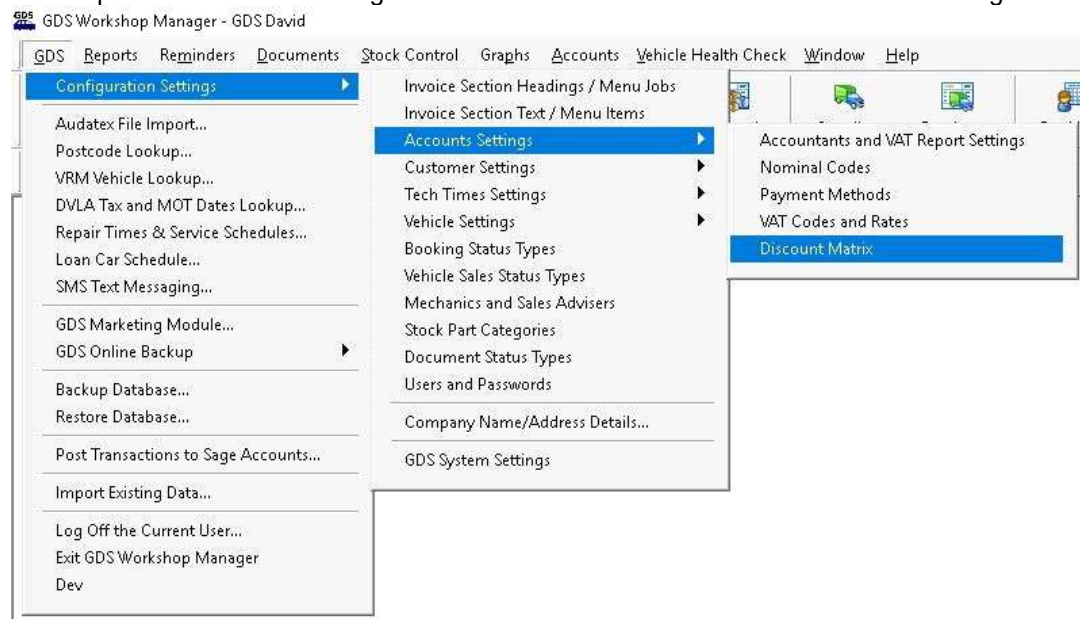
We have fixed an issue where description text was not wrapping to the next line if started in the middle of the invoice details.

Parts will now auto complete on Booking Parts and Labour screen.

Discount Matrix - requires enhanced stock

We have added the ability to create a discount matrix which will allow you to assign an array of discounts and/or markups to a customer or group of customers based part used, part supplier or part category.

To setup a discount matrix navigate to the Discount Matrix tool under Accounts Settings.



When selecting this option you will be presented with a list of current discount matrices to add a new one simply click New on the menu bar at the top of the screen and you will be presented with the Discount Matrix window, in here you can set the Supplier, Part or Category that will trigger the discount or markup, then you can set the percentage increase/decrease and set the type to either Discount or Markup, to use this column the Markup column needs to be enabled on sales documents.

GDS System Settings -> Labour Rates -> Show Sales Doc Markup % column

Name	Description
Group A	Group A
Group B	Group B
Group C	Group C

Search Column: Search: Name Find OK Cancel

(Discount Matrix List)

Name: Group A
Description: Group A

Supplier	Part	Category	Percent %	Type
TES001	TEST PART		30.00	Discount
		Batteries	10	Discount
			50	Markup

(Discount Matrix Details)

Once your Discount Matrix has been created and saved you can then assign it to one or more Customers by opening the customer record and setting the discount matrix dropdown to the Discount Matrix you want them to have.

Customer Ref: 017817
Name: Mr Graham Coleman
First Name:
Address: 1 Commonfield Cottages, Newent Central, Newent, Gloucestershire
Telephone:
Work Phone:
Contact Name:
E-Mail:

Parts Sales Price: Parts Disc Code: Discount Matrix: Group A

Finance: Labour Rate: Turnover: 0.00 Credit Terms: 0 Days On Stop No VAT Charged Default Discount: %

Reminder Methods: Send SMS Text Message Send Email Send Letter

Vehicle	Make and Model	CC	VIN	Engine	Next Service Due	Next MOT Due	Notes
734AUT	JAGUAR XE BASE MOD	2.0 LTR 137	SAJAB4AN9GA917				

After applying a discount matrix to a customer, from then onwards when creating an invoice/jobsheet/estimate/parts invoice using that customer and adding a part, if that part meets any of the options set in the Discount Matrix then the Discount or Markup will be applied to that part for that customer.

Alternative Parts - requires enhanced stock

We have now added the ability to set Alternative parts to a part record, an alternative part can be set to supersede which will warn you when adding that part that it has been superseded. To add alternative parts to a part simply open a Part record and select the Alternative tab.

Once these have been set when adding a part to an invoice/jobsheet/estimate/parts invoice you will see a

new tab at the bottom listing all the alternative parts specified in the list. If one of the alternative parts is set to supersede the current part a popup message will notify you that it has been superseded and ask if you would like to use this part instead, you have the option to switch to the alternative part or ignore and keep the selected part. The alternative Parts tab will then automatically display showing alternative parts for the selected part. Part highlighted RED in this area are parts that have been set to supersede the selected part. To use any of the alternative parts you can simply double click the part in the list you want to use and it will replace the part currently selected.

The screenshot displays the 'Sales Invoice' application window. The main window has tabs for 'Customer & Vehicle Details', 'Invoice Details', and 'Other Details and Comments'. The 'Invoice Details' tab is active, showing a table with columns: Part / Code, Nominal, Description, Mechanic, Quantity, Markup%, Rate, Disc.%, VAT, and Nett. The table contains one row: 'TEST PART' with nominal '4001', description 'This is a test part', quantity '1.00', and markup '250.00'. A popup window titled 'Alternative Parts' is open, showing a list of parts. The first part is 'TEST ALTERNATIVE' with description 'This is a alternative test part'. The second part is 'TEST SUPERSEDED' with description 'This is a test supersede part', highlighted in red. The popup also shows a search bar and a list of parts. The background shows the 'Invoice Details' tab with a table of invoice items and a summary section at the bottom right.

Part / Code	Nominal	Description	Mechanic	Quantity	Markup%	Rate	Disc. %	VAT	Nett
TEST PART	4001	This is a test part		1.00	250.00			T1	0.00

Part	Description	Sell Price	Current Quant
TEST ALTERNATIVE	This is a alternative test part		0
TEST SUPERSEDED	This is a test supersede part		0

Description	Amount
Vatable Items	0.00
VAT	0.00
Zero Rated Items	0.00
Total Invoice Value	0.00

Additional Line / Surcharge on Parts - requires enhanced stock

You are now able to set some additional information to be applied to an invoice when using that particular part, this can be used if there are any additional charges which may be involved with the part these can be added here, for example if you have an Exchange and Surcharge Policy the surcharge can be set here. If set any details specified here will automatically be added to the invoice after adding the part.

Stock Parts

Stock Item Details | Movements In | Movements Out | Adjustments | Notes | Alternatives

Part Ref Code: ☐ Item is a Tyre ☐ Omit Part from Stock Reports Last Sale:

Item Description: Sold (in last year):

2 Suppliers

	Supplier	Name	Supplier Part Code	Cost Price	Purchase VAT Code	Purchase Nominal Code	Primary Supplier
▶	None			1.50	T1	5000	<input checked="" type="checkbox"/>
	AUT001	AUTOPARTS		8.00	T1	5000	<input type="checkbox"/>

Sales Details [F8] to show Margin

Nett Sell Price: VAT Code: ... Nominal: ... Standard
Advanced

Unit of Issue (UOI): ☐ Price is VAT Inclusive

Item Location: Category:

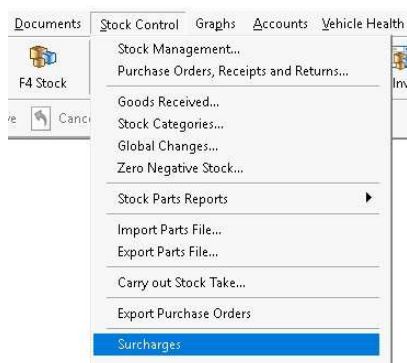
On Stock: [F10] Adjust Quantity Re-Order Level:

Required / Due: ... Re-Order Qty:

Display additional line on Invoice: ☐

Description: Value:

To refund any surcharges applied we have added an easy way to do this. Under Stock Control there is a new option labelled "Surcharges" you can then search for surcharges then simply highlight the ones you want to refund, right click and select create credit note. One credit note will be created for each individual invoice number.



Surcharges Finder

Enter one or more search criteria, select document types to search and click Search

Document No: Customer: ... Clear

Invoice Details or Part Number: Search

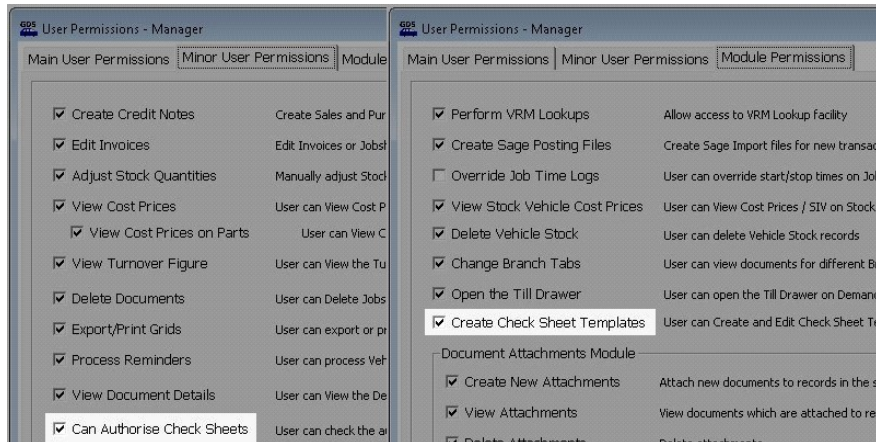
To find Text or Part Code in a line on a document e.g Clutch or VFL196

Search Results - 5 documents found.

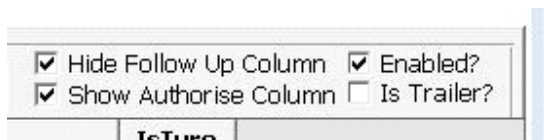
GDS Boat Manager - Updates 27th July 2016

We have added an option to allow the addition of an authorise column to Check Sheets and also the ability to right click any of the 4 status columns and select Check All to tick all the boxes at once.

We have added some additional user permission to restrict users from creating/editing check sheet templates and from being able to check the Authorise column if enabled on a Check Sheet.



On the edit check sheet template screen there are some additional options to enable/disable some columns. "Hide Follow Up Column" will hide the follow up column, "Show Authorise Column" will so the Authorise column which can only be checked by user who have the "Can Authorise Check Sheets" permission.



When the "Show Authorise Column" option is enabled on the checksheet template this will display an extra column as shown below, when checked, permissions allowing, the line will highlight blue for quick reference that the line has been Authorised.

Item	Fitted Price	Authorised
	0.00	<input checked="" type="checkbox"/>
	0.00	<input type="checkbox"/>

GDS Boat Manager - Updates 18th July 2016

We have made some general performance improvements and bug fixes.

GDS Boat Manager - Updates 27th June 2016

We have corrected a parts import issue where importing make and not model would overwrite model with blank data, or engine and notes fields if one was left out of the imported CSV. Make, model, engine and notes are now separate options.

We have made some improvements to the Xero export to improve purchase invoice cost calculations when more decimal places are required, to help prevent "The document total does not equal the sum of the lines" error in the Xero import.

GDS Boat Manager - Updates 15th June 2016

Due to popular demand we have added a Daybook Breakdown report with Profit, this can be used when the "Show Profit on Daybook" system setting is enabled under the "Labour Rates" tab and then selecting "Show Sales Invoice Breakdown" when running the report.

GDS Boat Manager - Updates 9th June 2016

We have fixed an issue where long text caused loading issues.

GDS Boat Manager - Updates 1st June 2016

Jobsheets

We have fixed an issue where printing jobsheets would sometimes produce an error that the total number of characters had been exceeded.

Returns

We have fixed an issue where editing a parts return would not allow you to save if it had caused the stock to reach 0 and if the check for zero stock is enabled.

SageLink

A SageLink update has been released to support Sages ability to store nominal codes between 4 and 8 digits.

GDS Boat Manager - Updates 28th January 2016

Zero Stock/Parts on Returns

Due to demand we have added in code to prevent parts with zero stock from being added to a Return or Purchase Invoice Credit Note. This will pop up a message notifying you that the part/item you are trying to return is not available in your current stock. We have also added the ability to turn this feature off in the system settings under the "Stock Control / Parts" tab and checking the "Allow zero stock on returns..." box, shown below.

GDS System Settings

You need to click Edit on the Toolbar above to allow any settings to be adjusted. Branch: **A** Branch 1

Labour Rates | Numbering | Accounts Settings | Other Settings | Other Settings 2 | Sales Documents | Document Lists | Purchase Invoices | Customers | Printed Documents | Reminders | E-Reminders | Communication | Printers | **Stock Control / Parts** | Vehicle Stock Book | Audatex Import

Default Stock Parts Sales / Purchase Codes

Sales Nominal: 4001 ... Parts
 Sales VAT Code: T1 ... Standard Rate
 Purchase Nominal: 5000 ... Parts for Resale
 Purchase VAT Code: T1 ... Standard Rate

☐ Ignore Parts Nominal when adding Parts onto Sales Documents
 Will use the Nominal Code set by the Document Section instead.
 ☐ Hide Cost Price Initially on Parts Lookup
 Press [F8] to Toggle Cost Price visibility
 ☒ Suppliers Part Code is based on Stock Part Code (on new parts)
 ☐ No Parts Dropdown List on Invoice entry grids etc.
 ☒ Right Click for Drilldown on Parts List
 ☒ Check Sell Price > Lowest Cost
 ☒ Ignore spaces in Part Ref when generating Barcodes

Tyre Settings and Tyre Ratings on Invoices

☒ Print EC Tyre Graphic
 ☐ Print EC Tyre Text
 ☐ Allow zero stock on returns & purchase credit invoices

New Stock Parts

Initial Re-Order Level: 1.00 Default UOI: 1.00
 Initial Re-Order Quantity: 0.00

Sell Price Descriptions

Sell Price 1: Sell Price
 Sell Price 2: Sell Price 2
 Sell Price 3: Sell Price 3
 Sell Price 4: Sell Price 4

☐ Use Rates Popup Menu on Sales screens
 If a Part has multiple prices set, you can use a popup button to pick the Sell Price from a popup menu

Enhanced Stock Control

☐ Use Enhanced Stock Control
 ☒ Allow Negative Stock Quantity
 ☐ Multi Branch Stock

Additional Module which may require activation.
 Has Purchase Orders, Goods Receipt, Stock Take and maintains an audit trail of stock batches in and parts out.

GDS Boat Manager - Updates 18th January 2016

Payments On Account

We have added the ability to save Payment to a customers account, these can be for deposits or a payment/retainer for future works. These can be added directly to a customers record.

To add a payment to a customers account, navigate to their record, there is a new tab (1.) labelled Payments, here will be a list of all payments added to the account along with how much is available to spend an options to add payments to the account (2.)

The screenshot shows the 'Customers' window with the 'Payments' tab selected. The 'Customer Ref' is 'DAT001'. The 'Available Funds' is '0'. A red box labeled '2.' highlights the 'Add Payment to Account...' button. The 'Payments' tab is labeled '1.'. The 'Finance' section shows 'Labour Rate: 0.00', 'Turnover: 0.00', 'Credit Terms: 0 Days', 'On Stop', 'No VAT Charged', 'Default Discount: 0 %', 'Parts Sales Price: [dropdown]', 'Parts Disc Code: [dropdown]', and 'Reminder Methods' with checkboxes for 'Send SMS Text Message', 'Send Email', and 'Send Letter'. The 'Associated Vehicles' section shows a table with columns: Vehicle, Make and Model, CC, VIN, Engine, Next Service Due, Next MOT Due, and Notes. The table is empty with the message 'No records to display'.

Pressing the "Add Payment to Account..." button (2. above) will display the below add payment window allowing you add a payment to the account.

The 'Add Payment to Account' dialog box has a title bar and an information icon. The main text says 'Add a payment to this customers account.' The fields are: 'Payment Date: 20/11/2015' (dropdown), 'Amount Paid: [text box]', 'Method: Maestro' (dropdown), and 'Note: [text box]'. At the bottom are 'Add Payment' and 'Cancel' buttons.

Right clicking on a payment will provide you with some additional options such as printing a receipt for the

payment, Refund all or a portion of a payment or removing a payment by zeroing off a payment.

These payments can then be used to pay off invoices, to pay off an invoice add a payment in the usual way and select Payment On Account as the payment method, you will then be presented with the below window to choose which payments to use to pay off the invoice. You can select more than one payment by holding down "CTRL" and click on a payment.

Sales Invoice Payment

Enter the payment amount and then click Add Payment.

Invoice No: 029154

Customer Ref: DAT001 Mr Garage Data Systems

Select payment to use

Select Payment(s) to use from the list below.

ID	Available Funds	Notes
32	500	

Amount to Pay: 153.27 Payments Total: 0.00

153.27 is still needed.

Use Payment(s) Cancel

Add Payment Close

GDS Boat Manager - Updates 15th September 2015

Booking Diary Screen

Filter options are now available on the Booking Diary list and on the Booking Diary History screen. You can choose which column you want to filter on and key in a search term to have the results filtered as the search term is being entered.

Document Attachments/Scanning

The Scanning procedure has been updated so that you can now scan several documents in succession, and have them combined into a single PDF document. This will facilitate easier storage and management of documents which are spread over several pages.

Payments Reports

The Payments Reports in the system now show a Net/VAT amount split for each payment reported.

Job Status / Colour Coding

The Jobsheet Status and Colour Coding feature has now been expanded to also cover the sales document lists for Estimates, Invoices and Bookings.

Email Sending / BCC option

There is a new system setting in the GDS System Settings screen to allow you to have any emails sent from the system emailed to a second address which you may use internally to keep a track of all emails sent from the system. The Address is a BCC address which means that the recipients of the email will not see that it has been sent to another email address for archive and management purposes etc.

Booking hours for bookings which span multiple days

An update to the Bookings screen now allows you to record work hours against each individual day for bookings which span multiple days.

Previously, you could only enter a single duration of hours regardless of how many days the booking was spread over.

Instead of a single Duration box, there is now a grid which has a row for each day in the booking range (the Due In Date to the Date Required date). You can enter the hours for each day individually to maintain better control over your available and used hours on a day by day basis.

The grid will allow you to scroll if there are more than 2 days to enter hours for, or you can use the dropdown arrow to expand the grid and view more rows at once.

Convert Multiple Bookings facility

The system now supports converting multiple bookings in a single operation (Bookings to Job Sheets or Bookings to Invoices).

You can highlight multiple rows on the Bookings Diary by holding down the Ctrl key on the keyboard as you click on each row. Holding the Ctrl key down means that a previously selected row will not be de-selected when the new row is selected.

When you click a Convert button then you will be asked to confirm that you wish to convert the selected documents.

Adjust Booking Dates

We have added a new facility to allow easy changing of the Booking Due In and Required Dates on Bookings when work has not been started. You may wish for example to update 3 booking records and change the Due In Date to be tomorrow, or on some other day in the near future.

To update one or more bookings, you can select multiple rows on the Booking Diary screen (using the Ctrl key as required), and then use the right click mouse button and choose Adjust Booking Dates from the popup menu.

Print Multiple Job Sheets/Invoices facility

The system now supports printing multiple Job Sheets or Invoices in a single operation.

You can highlight multiple rows on the Jobsheet or Invoice List screen by holding down the Ctrl key on the keyboard as you click on each row. Holding the Ctrl key down means that a previously selected row will not be de-selected when the new row is selected.

When you click the Print button the Print Dialog box will show and clicking Print will then print all of the selected documents.

GDS Boat Manager - Updates 26th May 2015

New Labour Hours Efficiency Report

A new report has been made available on the Reports/Mechanics & Advisers menu. The report works by comparing the time recorded against an invoice (via the Tech Times logging system, or via the Actual Duration field), and the labour hours entered onto the invoice. The system determines labour hours by references invoice lines with Nominal Codes that are specified as 'Labour' in the Nominal Codes configuration screen. The quantities for lines which have a Labour Nominal Code are then summed up to give Actual vs Billed Hours.

This is also shown as an efficiency percentage as follows:

If Actual Hours = 2 and Billed Hours = 2 then it would show as 100% efficient.

If Actual Hours = 4 and Billed Hours = 2 then it would show as 50% efficient.

If Actual Hours = 2 and Billed Hours = 4 then it would show as 200% efficient.

Maintenance Updates

Issue resolved on the Goods Received screen which would accept minus quantities in stock, and this would later cause stock level issues as stock items were added onto jobsheets or invoices. Minus quantities are now rejected on the Goods Received screen - any stock adjustments required should be carried out on the Parts screen.

Bookings - VAT Rate issue resolved where some lines were classified as Zero Rated even though the Code was set as T1 and there was a VAT Amount on the line.

Colour coding status on Jobsheets - issue identified and resolved, where when using a text colour of White (e.g if background colour was red), then the Printed tick box may look like a document was not printed even though it was. This was because the tick was showing as white, when the tick box is also white.

Attachments Module - it is now possible to email multiple attachments at once by highlighting several rows, and clicking on the Email Attachments button.

Emailing to Suppliers from within GDS - when emailing supplier related documents, the To... button now shows supplier email addresses which are recorded in the system. Previously the Too button only ever showed customer email addresses.

Maintenance Update - Email Sending

The GDS email sending facilities have been updated to allow secure sending of email data when using your own email provider. Some email providers, such as Google Mail, required a secure connection to connect and send email. GDS was not able to do this until recently. The default configuration for GDS is to use our own freely provided email server, but there is now more option for you to use your own, and it can bring many benefits. The email settings can be updated in GDS System Settings on the Communications Tab.

For more information, please see our new GDS Guides web pages for a page on this change, and how to take advantage of the changes: www.gdshelp.co.uk/guides

Jobsheet List - Job Status

New system setting added to activate a new facility to allow a Jobsheet Status to be set for individual jobsheets. These could be Boat on Site, Waiting for Parts, or Ready to be Delivered etc. Each status setting can also be colour coded if required, so that the line on the Jobsheet list will be in a colour of your choice depending on the Status assigned to the Jobsheet. Job Status can be enabled in GDS System Settings on the Document Lists tab. Once enabled, the status values can be configured from the Document Status Types menu option which will appear on the Configuration Settings menu.

Parts List

The parts list drilldown feature has a new option to show the Sales History for a Part. The sale may not necessarily be linked to a Boat/Engine. This drilldown includes the Invoice No and Customer ref. The Fitting History is designed to group by boat to show the overall quantity of a Part that has been fitted (sold) to the same boat/engine over time.

Stock Control

An issue has been identified and resolved in the Enhanced Stock Control system whereby if a Purchase Order was received for items which were required for a Job, that if more items were entered on the Purchase Invoice than had been ordered, that all items would be allocated out to the job. e.g If 2 were required and ordered, but 10 received, then the Movements In would show 10 in/10 out, instead of 10 in/2 out.

Stock Parts

A new facility has been added to the Stock Parts List screen. You can now right click on a part to view details relating to the Suppliers and also the Purchase and Sales history for the part.

A new option has been added to the Stock Parts Global Changes screen that allows you to adjust the VAT Inclusive setting on parts.

GDS Boat Manager - Updates 10th June 2014

Purchase Order Locations Report

There is a new report for Purchase Orders which details the stock location of each item. This can be useful for large purchase orders, or when there is a large storage area for stock items.

Tech Times - Technician Working Hours Timesheet Entry

A new Timesheet Entry form has been added to the Tech Times module to allow batch entry of times worked for each Technician. This can sometimes be more suitable than the Start/Stop process throughout the day as each job is started and finished.

The new entry form is available from the Tech Times screen using the Timesheet Entry context toolbar button.

A new report has also been added under the Reports/Tech Times menu called Weekly Timesheet Report which presents the Tech Times Timesheet Data in a new alternative format.

Purchase Orders List

Any part received orders are now shown in blue to help you keep track of outstanding orders. The Purchase Order printout now also shows how many items have been received against each line.

Emailing Invoices

There is a new system setting, which is set On by default to tell the system to ignore any Custom Header/Footer options when an Invoice is emailed. This means for example that you can use pre-printed stationary for printed invoices (when your name and address may not printed due to it existing on your headed paper), but when emailing invoices, the system will include your business name and address at the top of the invoice.

Purchase Orders

Purchase Orders can now handle partial receipt of goods. When a Purchase Order is received into the system, the quantity figure on the Purchase Invoice can be adjusted to match the quantity received. If there are any outstanding items, then the Purchase Order will not be archived, and the remaining items can be received at a later date. The Purchase Order will show how many items have been received against each line on the order.

Enhanced Stock Control Updates

Implementation of Purchase Returns. You can enter goods which are to be returned so that GDS can keep track of Credit Notes which are due to be received from the Supplier. Any goods entered for return are removed from stock.

Sales Credit Notes - any credit notes which are created will now see any stock items going into stock.

New Report - Customer Profile

A new report has been created which can be used as a marketing tool, and for customer record maintenance. The report shows the customer contact details to enable you to gather missing details as required (e.g. Mobile Phone Number or Email Address). Turnover for a selected date range is shown on the report, and any boats owned by the customer which have been invoiced in the selected period are also show, including the Next Service and Next MOT Due dates.

Marketing Module Updates

New option to run a Bottom (Least Spending) Customers campaign.

Top Customers and Bottom Customers campaigns can now specify to jump to a specific starting record.

e.g to run a campaign to the Top Customers who are ranked 100-200 in the list, you can specify to select 100 customers, starting at record 101.

New Report - Sales by Customer Type

On the Customer record, it is possible to specify the Customer Type, e.g Account, Fleet, Business, etc. You can configure the types as required. There is a new report on the Reports/Customers menu to report on the sales figures, and amount of invoices generated for customers, based on the Customer Type.

Change to Stock Parts - the system can now support up to 10 set of supplier details for each stock part. The previous limit was 2.

New facility to copy a Booking record. If you right click on a booking in the Booking Diary, you can now choose an option from the popup menu to create a copy of the booking, and specify a new time and duration.

Menu Jobs

Menu Job / Invoice Section Templates, can now be printed via the Print button on the Menu Job screen.

Email Screen and Document Attachments

GDS now has the facility to allow you to attach documents to email messages which are sent from, and recorded, within the system. If you use our Document Attachments Module to store scanned documents/photos etc against records, then you can also email the attached documents to a customer or supplier from the Document Attachments screen.

Invoice and Stock Parts Maintenance grids

We have now introduced a Dropdown Parts list on the Parts column. A few customers had enquired about us adding this facility.

When Part Codes are typed in, a filter list will dropdown automatically, and items can be selected. To view the old style Popup Window which shows a bit more information about each stock part item, then please press the F1 key as normal.

Part / Code	Nominal	Description	Quantity	Rate	DiscF%	VAT	Nett
5447258	4000	Labour		35.00		T1	0.00

Part	Description	Stock Qty	Sell Price
5447258	Bush	0.00	3.41
5447697	T/CABLE GAS	0.00	24.94
5447713	HOSE	0.00	43.04
5447717	HOSE	0.00	38.12
5447733	HT SENSOR (RENAULT PART)	0.00	0.00
5448005	BRAKE CABLE	0.00	121.23
5448013	BRAKE CABLE	0.00	103.66
5448152	HEAD G/SET (M1ST)	0.00	0.00

To set Discount as an Amount (not %), press **Ctrl + D**
To add Notes or Cost Prices to a line, press **F10**
Please note: Column widths can be adjusted by dragging between column headings

Cancel Button!

A few customers have recently requested changes in this area and we have now devised a solution. The cancel button will now warn you prior to cancelling changes if it has detected more than 10 keystrokes, button clicks or menu job operations.

GDS SageLink Module

GDS SageLink updated - payments and receipts which are sent to sage will now include the Payment Method in the description. This may assist you in reconciling payments and bank statements etc.

Send Email button on Customer related screens

If the Email Sending option is specified in GDS System Settings, an Email button will now be displayed on the Customer, Jobsheet & Invoice, and Booking screens to give you the facility to email a customer from within GDS. This new facility works alongside the previous existing facility which allowed you to email documents to customers, such as statements or invoices.

Print Marketing Results Customer List

The GDS Marketing Module, Customer Results tab, has a new button the Print Results which allows you to print a list of customers who will be targeted in the campaign. The Customer name and phone number is provided on the report along with a space to record your own notes, for example response success or failure.

Document Finder and Archived Invoice Search Dialog

There is a new option to specify that only Unpaid Invoices are searched on. This will allow you to list all Unpaid Invoices in a single list and allow Payments to be made or Invoices to be re-printed etc.

Document Attachments Module

Document Attachments screen now supports Document Scanning and uploading into the document repository via a standard scanner which supports the TWAIN interface.

Customer Screen - new option on the customer screen "No VAT Charged". This will zero any VAT Amounts on documents created for customers which have this option ticked.

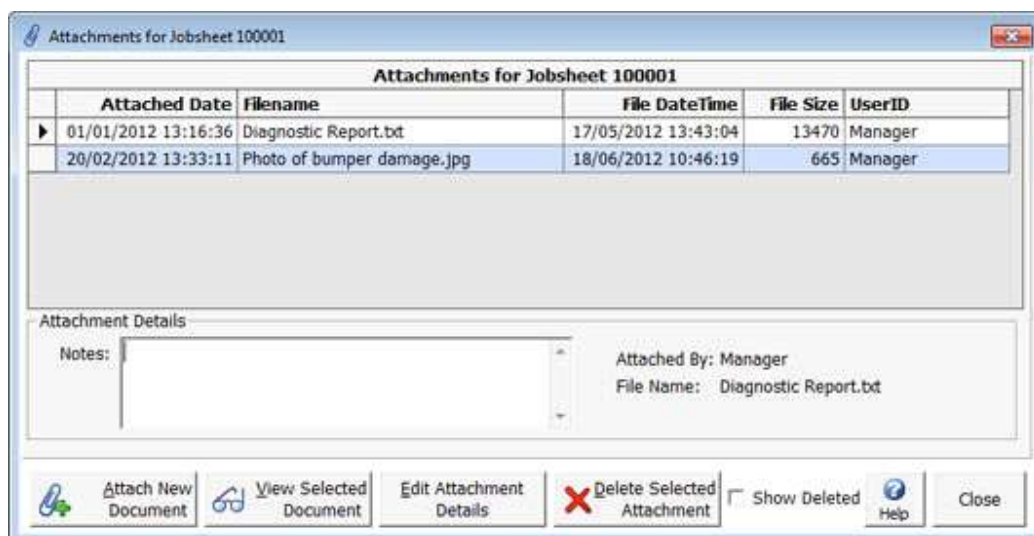
New email functionality added to the system. There are new buttons on the Report Preview screen for Saving and Emailing the current report. The Save button prompts you to save the report straight to a PDF File, and the Email button will allow you to search for an email address and write an email to email off the report that you are currently looking at. The report could be a customers statement, jobsheet, etc.

GDS Boat Manager - Update 10th July 2012

New Customer Notes indicator on Sales Documents and Bookings screens to indicate if Notes are present on a customers record. If Notes are present, the symbol will be highlighted in yellow. You can double click the Notes symbol to view the customer notes.

New - GDS Document Attachments Module released which allows you to add scanned documents, or PDF documents, images, Word documents etc to records in the system. You can make many attachments for any particular record such as a Customer, Boat, Jobsheet, Invoice etc. An Attachment Finder is also included to search for attachments at a later date.

A free fully working trial of this module is available.



GDS Boat Manager - Update 21st June 2012

New optional column now available on the Jobsheet and Invoice Screens for Sales Markup%. You can turn this option on in GDS System Settings on the Labour Rates tab. When in use, the Sales Markup can calculate the Sell Price (Rate) from the Cost Price.

Online Backup Module Update - for any customers using our Online Backup Module to automatically backup your database each day, you can now view the Backup Event Log from within GDS via the GDS menu, then Online Backup sub menu. You can also use this Event Log screen to start an online backup on demand.

New Report - Aged Debtors Detailed report (on the Reports/Unpaid menu) which shows all overdue invoices with the invoice breakdown included so you can see at a glance what the overdue amount is for each customer, and what work or parts were supplied.

The Extended Bookings Diary with Holiday Bookings/Monthly Overview is now switched on by default. You can turn it off in the System Settings screen. The Help file has been updated to reflect these new program screens.

GDS Boat Manager - Update 10th May 2012

New - Online Backup Module released. A free trial is available so please call us to setup an account for you. This new module costs just £1 per week. You can have your GDS database backed up automatically each day and the backup file securely uploaded and stored on our servers with email notifications if backups haven't taken place.

SageLink Module Update - SageLink Send Payments to Sage facility is now compatible with the Sage Cash Accounting Mode.

Document History Notes updates - when a document is converted from a Jobsheet to an Invoice, the Document History on the Jobsheet now records the Invoice Number which was created as part of the notes. Previously the notes just said "Converted to Invoice." The Document History notes have now been extended to cover Booking records as well.

Enhanced Stock Control features. The Stock Movements Out grid on the Parts record screen will now also show Parts which have been sold, but for which there was not enough stock, and so the parts are required or on order. These lines are shown in blue.

Sales Day Book report now accepts a Customer reference code as a filter so you can filter the Day Book report for any date range and for a specific customer. This could be useful to run a profitability report for a specific customer.

GDS Boat Manager - Update 30th March 2012

Maintenance Update - Enhanced Stock Control. The Stock Movements In grid on the Parts record screen was not always displaying in Date Order. This has been resolved, and the grid columns can now be sorted by clicking on the column header.

New Print Part Codes option on the Print Invoice Dialog to toggle whether part codes are printed on an Invoice by Invoice basis. This can be used to override the default setting you have set in System Settings.

GDS Boat Manager - Update 15th March 2012

Estimate to Booking facility now retains the Estimate in the Old/Converted History Tab when previously the Estimate was not retained.

Parts record screen on Enhanced Stock Module has new box to display the stock quantity required or on order if the part has been sold but was not in stock. This works in conjunction with the negative stock quantity updated added in the last update, so if the quantity is minus 2 for example, you should expect to see 2 Required/Due.

GDS Boat Manager - Update 27th January 2012

Enhanced Stock Control now has the ability to show a negative stock quantity. Any items which are listed as being Required in the Stock Management screen will be deducted from the quantity shown in stock. This will allow you for example if you had Zero to sell 2 items, and the quantity would show minus 2, and then once you order or receive the items in, the quantity would go back to Zero. This option is On by default but can be turned off in GDS System Settings, Stock Control Tab.

New facility to print Barcodes - If you are using the Barcode Module there is Print button next to the Barcode on the Parts screen. GDS will load the Barcode into Windows Wordpad where it can then be printed or copied/pasted into other documents.

The Import Parts facility now has facility to import a barcode.

New GDS System Setting to set the Mobile Number field to be numeric only. This option is in GDS System Settings on the Other Settings Tab. It can be useful to set this option to be On if you use GDS for sending Text Messages as it will ensure the number remains valid by not allowing users to type letters or names into the box.

GDS Boat Manager - Update 15th December 2011

Marketing Module - new filter option to narrow down specific Models in the search results.

Document Finder - new search option added to be able to search on Customer Order No.

Tech Times Job Logging / Barcoding. There is a new feature which allows you to be able to add parts onto a Jobsheet from the Tech Times screen via the keyboard or by using a Barcode Scanner. This can be useful if you have technicians in the workshop clocking onto Jobs as it provides a simple way for technicians to be able to record parts on a Jobsheet without accessing the Jobsheet screen.

Menu Jobs - Summarise option. This is a new Summary View option on Menu Jobs so that you can specify that a menu job should not print each detail line on an invoice, but just the heading line and a sub total.

GDS Boat Manager - Update 1st December 2011

New GDS Marketing Module which allows you to build marketing campaigns and target specific customers or boat owners based on certain criteria, such as specific Makes or Last known Mileage. You can run simple campaigns to all customers to offer Winter Checks for example, or a more specific campaign owners of a specific model with a last known hours between 5,000 and 6,000 to advise them of a likely service.

You can target customers via SMS Text Messages, Emails or Printed Letters, and there is a simple word processor included which can be used to add text effects such as bold, italic and underline to the letters. Free trial of this module is available. You can load the program from the GDS menu in GDS Boat Manager.



GDS Boat Manager - Update 12th September 2011

New Report - Overdue Recalls

New reports added on the Reminders menu so you can run reports to see which boats are overdue by Service for a month for example and print a report which you can use to contact customers.

New System Settings

New settings added - "Customer Contact Details Mandatory" on Customers Tab will not allow you to save a Customer record without a Name, Address or Phone Number. "Mileage Mandatory" on Sales Documents Tab will not allow an invoice to be saved or printed if it does not have a mileage entered.

New Enhanced Stock Module released.

GDS has always included a basic stock control system with many reports. Some customers have expressed an interest in a more comprehensive stock control system with Purchase Orders, Parts Movements/Audit Trail of Goods In and Out and Stock Take facilities. This Module is available free to trial and can be switched on on System Settings/Stock Control Tab.

GDS Boat Manager - Update 1st September 2011

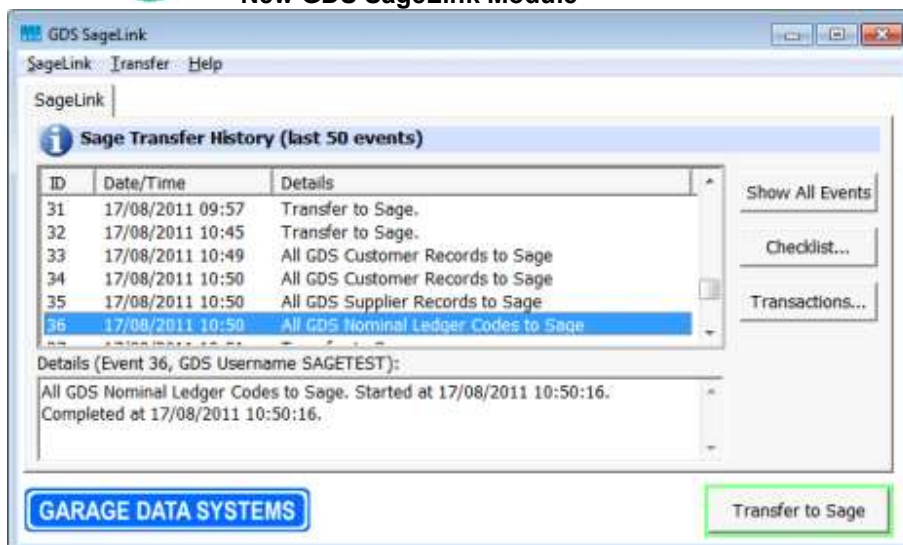
New update on Invoice/Jobsheet screens to allow discount by money amount. Previously GDS only supported line discount by a percentage. You can press F10 on a line to access this, or press Ctrl+D on the line to toggle the discount type by money amount, or percentage. Discounts by money amount will display in blue.

GDS SageLink Update - Different Bank Nominal Codes can be linked to each Payment Method when Posting Payments to Sage.

GDS Boat Manager - Update 18th August 2011



New GDS SageLink Module



This update sees the introduction of the new optional GDS SageLink Module which can be used to provide an enhanced link if you use Sage Accounts alongside GDS. The GDS SageLink module allows GDS to communicate directly with Sage. This means GDS can now send Invoices and Payments over to Sage without the need to create CSV files and run an Export/Import routine. This will make for smoother transfers of data and any transfers between sage, or any problems, will be reported and logged in a more efficient manner.

A Free Trial of the GDS SageLink Module is available. Please call support on 0845 652 4461 for more details and to download and install a trial.

GDS Boat Manager - Update 26th July 2011



Barcode Scanning Module Update

Updates to the GDS Barcode Scanning Module which now allow you to store Barcodes against Stock Part records in the system and use a Barcode Scanner when entering parts onto Jobsheets/Invoices, or when looking up part records in the system. You can also choose to print Part Barcodes on the Jobsheets and use the Barcode Module for controlling the Tech Times Job Hours Logging Module.

A Free Trial of the Barcode Module is available. The optional Barcode Module will include one free Barcode Scanner and GDS can supply additional barcode scanners if required.

GDS Boat Manager - Update 12th July 2011

New Barcode Scanning Module

This update sees the introduction of the optional GDS Barcode Scanning Module which can be used to operate the GDS Tech Times Job Hours Logging Module, and also used when scanning part codes in or out of GDS. 2 new Tech Times reports are available to print the Mechanics Barcode sheet, and Non Productive Jobs Barcode sheet. When the Barcode Module is activated, a Barcode will be printed onto Jobsheets which can then also be scanned by the system in Tech Times or the Document Finder.

A Free Trial of the Barcode Module is available. The optional Barcode Module will include one free Barcode Scanner and GDS can supply additional barcode scanners if required.

GDS Boat Manager - Update 9th February 2011

Bookings Diary

It is now possible to store a Note/Comment against specific days. Storing a note against a day will highlight that day on the calendar to bring your attention to it in the future.

Document History Notes

There is a new Notes box on the Jobsheet/Invoice screen which will record an audit trail of activity against a document, such as when it was created, printed or edited, including the GDS username and date & time. You can also store your own notes which can be referred back to in the future if required.

GDS Boat Manager - Update 10th January 2011

Converting Estimates to Jobsheets

There is a new functionality whereby when you convert an Estimate to a Jobsheet, GDS will now retain the old Estimate in the Old / Converted Estimates tab where you can call them back up in the future if needed. Previously, GDS would only retain the old Estimate if it was converted from Estimate to Invoice.

SMS Text Messages

SMS Text Messages - if you use the SMS Text Message features, the credit balance may be reported as a decimal in future, e.g 99.6 credits remaining. The reason for this is that some country destinations are being charged by our service provider at more than 1 credit per text message.

Most countries, including the UK and Ireland, are charged at 1 credit per message but some country destinations, e.g texting a Spanish mobile, may be 1.4 credits.

You can check the credit cost for other countries by going into the SMS Text Sending screen and choose

Check Credit Balance and clicking the link to Check Credit Costs or visit www.gdshelp.com and click Check SMS Text Credit Costs.

GDS Boat Manager - Update 15th December 2010

New Enhanced Booking Diary module with Mechanics Holiday records

We have recognised that there has been a requirement to improve the existing Booking Diary to make it more comprehensive and that will assist more with Workshop Loading, Monthly Overviews of Available/Booked Hours and recording Mechanics Holidays.

You can switch the new Bookings module on in GDS System Settings, Other Settings 2 Tab under the Bookings Diary section, or please call our Support Line for assistance.

GDS Boat Manager - Update 2nd December 2010

New Reports added

Boat Statistics report (on Reports menu) which displays the quantity of each boat Make which has been invoiced in a set period. You can optionally show the Net total of the invoice value by Make as well.

Unpaid Sales Reports - there is a new option to do a Landscape report. The Landscape version of the Unpaid Sales Reports includes the Nett and VAT figures for each invoice as well - these are not on the default report due to there not being enough room to display all of these columns.

GDS Boat Manager - Update 1st November 2010

Update to Tech Times/Technician Hours Module

The Tech Times mechanics working time recording module now has the facility to record times against user defined Non Productive Jobs such as Breaks, Cleaning etc. This allows you to separate out time spent on Jobsheet related work when viewing the Daily Timesheets report for each mechanic.

If you would like to evaluate the Tech Times module, you can activate it from the System Settings screen / Other Settings Tab, or please call us for assistance.

GDS Boat Manager - Update 26th October 2010

Update to Enhanced Stock Control Module

When goods are ordered via a Purchase Order and then items received for jobs or invoices, the ordered items will now show on the Stock Movements In/Out tabs on the Parts record.

Previously only items purchased specifically to put on stock were entered as Stock Movements.

This update improves the auditing and traceability of goods received and allocated to jobs or invoices.

GDS Boat Manager - Update 6th October 2010

Parts List / Finder Screen

Search Facility updated so you can now search for multiple words which may appear at any position on the search field. e.g. BOSCH WIPER will find BOSCH 21" WIPER BLADE.

Top Stock Items Used report

A new report has been created to display the top stock items sold by category between a selected invoice period. The report is on the Reports menu / Stock Parts sub menu.

GDS Boat Manager - Update 7th September 2010

New Invoice Save option - Prompt to Print or Pay Invoice

A new System Setting has been added (GDS System Settings / Sales Documents tab) called Prompt to Print or Pay when Invoice Saved has been added. This option is set off by default.

If the option is set On, then after an Invoice is saved, a small message will appear and provide option buttons to Print or Receive Payment against the selected invoice.



New Copy Jobsheet and Copy Estimate option

You can now right click on a Jobsheet or Estimate in the list screen to display a popup menu with the option to copy the selected document to a new one.

User Permissions

New User Permission - Adjust Stock Quantities to control who can make adjustments to the Stock Quantity amount for Stock Items.

GDS Boat Manager - Update 1st September 2010

Maintenance Update

Our address which is displayed on the Login screen has been updated to our new address.

The system now has a Update Suggest setting which means that at a set interval, the system will remind you to Check for Program Updates. When the system pops up the screen, you can choose check for updates, or prompt to be reminded again in the future, or to switch the Remind facility off completely.

E-Reminders for customers MOT/Service reminders, are now stored against the Customers Email or SMS Text Message history for future reference.

GDS Boat Manager - Update 16th August 2010

New Purchases/Accounts Report option

The Purchases Nominals report (found on the Reports menu, Accounts sub menu) now has the option to do a Purchase Invoice breakdown by Nominal Code. This allows you to analyse expenditure by Account Nominal Code, and then see which invoices used that code.

GDS Boat Manager - Update 9th August 2010

Payments Screen - now remembers the last payment method used instead of reverting to Cash each time.

Jobsheet Print Dialog - now remembers the last printer used in case you use a different printer for printing invoices than you do for printing jobsheets.

GDS Boat Manager - Update 30th July 2010

Booking SMS Text Reminders

You can now specify the Booking Time on the SMS Text Message by using the {DueTime} mailmerge marker

On Stop Customer flag

If the On Stop status flag is ticked on the Customers record there is now a visible On Stop label displayed on the Invoice/Jobsheet and Booking screen.

Column Order on Invoice/Jobhseets List

There is a new System Setting in GDS System Settings / Document Lists tab to allow you to be able to reposition the columns on the Invoices/Jobsheets List screen.

Purchase Payments report

The Purchase Payments report now shows the Suppliers Invoice No instead of the Purchase Invoice record number.

GDS Boat Manager - Update 11th June 2010**Email Invoices/Estimates Option**

Emails sent to Customers are now stored in the database against the customers record in order to be viewed at a later date if required.

Bookings Screen

There is a new Notes/Comments tab where you can store any customer comments or notes for the booking. If the booking is convert to Invoice/Jobsheet, the notes are also transferred.

Data Grid Print/Export Facilities

More grids in the system now have the right click menu option to Print or Export to file - you can right click most grids in the Customer, Boat and Supplier screens. When exporting to file the file will save to disk and then open in Notepad so you can view it immediately.

GDS Boat Manager - Update 21st May 2010**Email Invoice and Estimate Option added**

Invoices and Estimates can now be emailed directly from the system. On the GDS System Settings screen, Communicaiton Tab, you can enable the Email facility and specify your company Name and Email Address.

When On the Invoice or Estimate List screen, a new menu item "Sales Invoice/Credits" (or "Estimates") will appear along the top menu bar which has the option to Email Selected Documents.

If you hold down the Control key on the keyboard, you can click and select several documents to send at the same time.

SMS Booking Reminders facility

If you have the SMS option enabled in System Settings, there is a new dropdown menu called "Bookings" when on the Bookings Diary which has an option to send SMS Booking Reminders to customers due on. You can set the SMS Text Template up in GDS System Settings, E-Reminders Tab.

Please contact us if you require more information or to setup an SMS Text Message account with us.

GDS Boat Manager - Update 20th May 2010**Email Invoice Option added**

Invoices and Estimates can now be emailed directly from the system. On the GDS System Settings screen, Communicaiton Tab, you can enable the Email facility and specify your company Name and Email Address.

When On the Invoice or Estimate List screen, a new menu item "Sales Invoice/Credits" (or "Estimates") will appear along the top menu bar which has the option to Email Selected Documents.

If you hold down the Control key on the keyboard, you can click and select several documents to send at the same time.

GDS Boat Manager - Update 14th May 2010

New Sage Posting option

There is a new Accounts Export option in GDS System Settings which controls whether Sales Invoice lines are grouped when they are sent to Sage. Grouping is on by default.

When Grouping is on, lines which have the same Nominal Code and VAT Code are grouped together into a single Sub Total line. This is useful if you don't wish to clutter the Sage Audit Trail with lots of lines.

When Grouping is off, each line is sent to Sage separately. This is useful if you wish to see the details of each invoice line on the Sage Audit Trail / Customers Activity.

GDS Boat Manager - Update 19th April 2010

Invoices/Estimates VAT Amount Override

The VAT Amount is usually calculated and stored automatically on a line by line basis. If you wish to override the VAT Amount for a particular line, press the F10 key on the keyboard when on the particular line and enter the new VAT Amount in the popup window. You can also use the popup window to store a Note or a Cost Price for the particular line.

Purchase Invoices

Following feedback from several customers we have now added a new Unit Cost column onto the Purchase Invoice screen, so you can now enter Quantity and Unit Cost instead of just a Total.

GDS Boat Manager - Update 25th March 2010

Reminder Dates Popup list now supports 8 and 12 week intervals.

Purchase Invoices - Calculate VAT option - you can now set an Option in GDS System Settings to stop GDS automatically calculating the suggested VAT on new Purchase Invoices.

Unpaid Purchases report now supports Partial Purchase Invoice Payments.

Stock Parts Import Routine Updated

- Automatic detection of quotes, so there is now no need to specify if the CSV Import File has quotes surrounding the data.

- Also handles missing columns better, so now only needs Part Code, Description and Sell Price as the minimum columns in the import file.

GDS Boat Manager - Update 1st March 2010

New Reports

- Tech Times - new Mechanics Daily Timesheet report which details a mechanics work for each day in the date range.
- VAT Report - there are new VAT report options which allows you to get a summary or detailed listing of all VAT Amounts for all VAT Rates. The system previously only reported on 4 VAT Rates.
- Stock Report - new Goods Received report (Reports menu/Stock Control) to report on Goods Received entries which may have been used to load or adjust stock items.

Sales/Purchase Graphs - new Posted Date option

- when graphing using the Posted Date - only Posted/Archived invoices will be used,

and the Date Range will be the Invoice Posted Date instead of the Invoices Invoice Date

Customers - Multiple Addresses option

- new option to store multiple addresses against customers on Customers Tabs in GDS System Settings
- When enabled, after picking a Customer on Invoice/Jobsheet, a new button "Select Address" will appear.
- You can then pick from a list of alternate addresses stored against that customer.

GDS Boat Manager - Update 1st February 2010

Update - Customer Enquiry Source - Recording and Reporting facilities.

There is a new option in GDS System Settings (Customers Tab) so that you can set GDS to prompt for the Enquiry Source when you are creating new Customer records via the New Customer button when you are creating a new Jobsheet, Estimate or Invoice.

Update - Purchase Invoices screen. - When you are entering a new Purchase Invoice, if you choose to enter the Nett value of the invoice in the top boxes to assist with balancing off multi line invoices, then the system will now automatically calculate the VAT figure based on the current Standard VAT Rate.

Update - Tech Times Hours Logging. - The Tech Times Job Times Report now uses the Date Range to report on the recorded Job Start or Finish times instead of the Jobsheet Date. Running the report with today's date for example will report on any Jobs that have been worked on today regardless of when the Job was originally booked in.

GDS Boat Manager - Update 20th January 2010

New - Customer Enquiry Source - Recording and Reporting facilities.

GDS now has the facility to store the Customers Enquiry Source - also known as the Referral Source.

You may wish to know how your different advertising methods are performing and this can help.

In the Customers Screen on the Notes Tab, there is a new Enquiry Source drop down list. You can either type the source in or pick from a drop down option. You can configure the contents of the drop down list from the GDS menu, Configuration Settings Sub menu under Customer Enquiry Sources.

To accompany the new Enquiry Source information stored against the customer, there is a new Sales by Enquiry Source Report available on the Reports menu / Customers reports sub menu.

You can specify the date range which you would like to run the report against, and then for each Invoice in the system, the report will group together the invoices based on the Customers Enquiry Source.

Update - Tech Times Mechanics Hours Logging facility.

There are a few enhancements to this new module.

There is now a Refresh button in the toolbar to refresh the jobs listed. The Comments text box is now also a dropdown list, so you can type a comment or pick a standard one from the drop down list. The standard comments are configurable via the GDS menu, Configuration Settings and then Tech Times Comments Templates.

There is also a new facility to be able to change the Start or Stop time of a previously recorded event in case of error, or failing to perform a Stop before close of business for example. If you right click on a Start/Stop event there is a popup menu choice to Update the Start/Stop times. The logged on user will need the Tech Times Override User Permission to do this.

GDS Boat Manager - Update 4th January 2010

New - Makes & Models Editor. The system now allows you to edit the existing Makes and Models data which is used for the dropdown lists on the Boat screen. You can also make up complete new sets of Make/Model data if the existing data does not fit your business type.

The Makes/Models editor can be accessed via the GDS/Configuration Settings menu option.

GDS Boat Manager - Update 10th December 2009

New - Tech Times - Job Time Logging Module now available as an additional option in the system. Over the past few months we have developed a Job Time logging module to aid reporting on mechanics efficiencies and job hours worked etc. The system works by allowing you to allocate a Mechanic to a Job and then perform Start and Stop events to record the time and duration a mechanic spends on a particular job. The system can cater for multiple mechanics on a single job. If you wish to evaluate this feature, you can enable the Tech Times module evaluation by going into GDS System Settings/Other Settings Tab, and then enable the Tech Times setting. Please call us or check out the GDS Help file for more information or to purchase this valuable new feature.

New - New right click menu options on the Invoice List screen. There are 2 new options - Copy Invoice to Jobsheet and Copy Invoice to Estimate. This allows to create a new Estimate or Jobsheet in the system, and have it based on the selected invoice. You can then edit the Estimate or Jobsheet as required, and convert it to a new Invoice later. Also - if you created an Invoice in error, and which to revert it to be an Estimate or Jobsheet, you can use this new copy feature to first Copy the Invoice to an Estimate, and then Zero or Clear the invoice so that it will not be used in the accounts.

New - Text Messages Report on Reports / Customers menu. If you use the GDS system for sending Text Messages, you could review the text messages sent to each customer via the Customer screen, but you can now run a report on text messages sent for a particular date range, or for a specific customer. This can be useful if you have sent ad-hoc text messages

GDS Boat Manager - Update 1st December 2009

New - Daily Operations Report - There is a new report in the system which provides an invoice breakdown and payments received for invoices dated for a particular period. You can specify a From and To date range to display a breakdown of the sales by Nominal Code and VAT Code. The figures include Net and VAT. For each invoice in the date range, there is also a summary of the payments received, and the balance outstanding on them invoices.

GDS Boat Manager - Update 23rd November 2009

New - New Customers Reports added on the Reports menu, in the Customers sub menu. There are 2 new reports:

Top Customers report, which allows you to search for the highest value customers for a specific period. For example, you can run a report which will show you the Top 50 or Top 200 customers over the last 12 months, or for all time.

Lapsed Customers report, which allows you to generate a list of customers which have not been invoiced for work since a certain date. You may for example want to know which customers have not visited for work in the last 6 months, in order that you could call them or write to them.

GDS Boat Manager - Update 16th November 2009

Update - More details available on Document Lists (Jobsheets, Estimates & Invoices) There are new options available in GDS System Settings (Documents List Tab) where you can specify to switch on new columns of information relating to a Jobsheet or Invoice etc. You can specify to show the Customer Reference Code, Make and Model, Fleet No etc.

If you switch on additional columns, you may need to shrink some of the columns so that they will fit on your screen, or you can scroll across left and right to see the additional details.

Update - Customers Statement report. A new column has been added to include the Customers Order Number, in case one has been specified against a particular Invoice.

GDS Boat Manager - Update 11th November 2009

Update - Bookings Screen - Bookings which span more than 1 day can now be displayed as a booking on any other dates which are between the Due In Date and the Due Out Date.
i.e If a boat is Due In on a Monday, and out on a Friday, it will show up as a Booking for each of the 5 Days, Monday to Friday inclusive.

Please note: This option is set **on** by default, but if required, you can turn the setting off in the GDS System Settings, on the Other Settings 2 Tab (Bookings Section).

GDS Boat Manager - Update 30th October 2009

Update - Customers Screen - new Default Discount field which allows you to specify the amount of discount a customer may receive off each invoice. The discount is applied to each line entered onto any Jobsheets, Estimates or Invoices created for a customer.

GDS Boat Manager - Update 13th October 2009

Update - Stock List Report - new filter options to specify the Stock Location, and also whether to display additional details, including Location, Last Sale Date, and Sold in last 12 months.

Update - Customer, Boat, Parts lookup screens - the system will now remember which column was last searched on, and use this as the default search column when the lookup screen is next used.

New - Purchase Document Finder. To run along side the Sales Document Finder, the new Purchase Document finder can be opened via the Documents drop down menu. You can search on a variety of fields, or by a description of a line item.

GDS Boat Manager - Update 29th September 2009

New - Internal Jobs use Parts Cost Price option in System Settings on Customers Tab. The option is set off by default.

New - Print Technician name on Invoices option in System Settings on Printed Documents Tab. The option is set off by default.

GDS Boat Manager - Update 23rd September 2009

Update Boat Service History Report - now includes any Advisory notices or Comments which were entered onto the invoices for the specified boat.

New - System Settings - Warn if Order Number not entered. You can set this option if you want the system to warn you if you have not entered a Customer Order No on a sales document when the document is saved.

GDS Boat Manager - Update 26th August 2009

Update Stock Part Import - new options and optional fields available for importing in.

New - Log Off Current User option on GDS menu

Update System Settings, Customers Tab - new options to set the default Credit Terms for new customers which are added to the system

Update Reports, Daybook Report - The daybook report used to be a combined Sales and Purchases report - it is now available as separate Sales Daybook and Purchases Daybook

GDS Boat Manager - Update 19th August 2009

Update Stock ReOrder Report. There is a new filter to be able to only show stock items which have a ReOrder Quantity greater than zero.

GDS Boat Manager - Update 13th August 2009

Update Parts details screen. There is a new field on this screen for ReOrder Quantity which can be used to tell you how many items you need reorder once the ReOrder Level is reached.

Update System Settings Screen

4 new options have been added:

- 1) Purchase Invoices Tab - you can specify the VAT Code which will be applied to items that are added to Sales Documents from a Purchase Invoice - this is mainly for Ireland, where parts are bought in with one VAT Code, and often sold out under a different VAT Code.
- 2) Purchase Invoices Tab - Auto Increment Our Ref field option. If you use Purchase Invoices and enter a number into the Our Ref field box, GDS can increment that number for each new Purchase Invoice entered. With the new Auto Increment option, you can turn the Auto Increment off.
- 3) Stock/Parts Tab - new option for New Stock Parts -
You can specify the default ReOrder Level for new items which are entered.
- 4) Stock/Parts Tab - new option for New Stock Parts -
You can specify the default ReOrder Quantity for new items which are entered.

GDS Boat Manager - Update 10th August 2009

Update Jobsheets - Quality Control Signatures - there is a new setting on GDS System Settings, Other Settings Tab, in the Documents section, there is a new setting to Print Jobsheet QC Check. Setting this option will print 2 signature boxes on the jobsheet.

GDS Boat Manager - Update 21st July 2009

Minor Maintenance Release

Invoice Screen -

The boxes for Customer, Technician and Advise comments have been increased in size - so that approx 7 rows of text is visible, and a scroll bar has been added to make it easier if lots of text has been entered into the comments boxes. The amount of text which can be entered is not limited.

GDS Boat Manager - Update 10th July 2009

Update - The Accounts Sales Nominal figures report has been updated. There is a new option to Display Breakdown by Invoice. This option will list the invoice details which are used when calculating the Nominal figure for the date range selected on the report.

Update - The Accounts DayBook report has been updated. There is a new option to Display Sales Invoice Breakdown. This option will list the Nominal Code totals which are used when calculating the Invoice totals for the date range selected on the report. The Boat Registration Number is now also displayed on this report.

Update - Boat Details Screen - The Fleet No has been moved from the Notes tab on to the Main Details tab. This field is also now shown, and is searchable, on the Boats List screen.

GDS Boat Manager - Update 3rd July 2009

Update to the Daybook Report - This can now group by day, so that you could for example run the Daybook report with a month date range and see daily totals.

Update to the Don't Print Labour Quantities or Rates settings. If you have the option set to not print Labour Quantities or Rates, the system currently decides this based on the Nominal Code of the line item. There is a new option in System Settings (Labour Tab) where you can now also specify a Labour Section Description, so that the Quantities or Rates will be suppressed if the Nominal Code matches a specific code, or if the Section which the line is in matches a specific Section Name.

Update to the Unpaid Report - it now shows an Aged Debt summary so you can see how old the value of the outstanding invoices is.

New - ability to set your own Printed Document titles for Invoice, Estimate, Jobsheet, Quotation. There are new settings in the System Settings (Numbering Tab) where you can override the headings printed onto Invoices, Jobsheets etc.

GDS Boat Manager - Update 5th May 2009

Update - Email / SMS Reminder Screen. 2 new function buttons have been added to this screen. The first is a Reset button so that you can now reset the Processed status for reminders which have already been sent, in case they need to be sent again for the selected reminder/period. The second button allows you to send any unprocessed reminders as a Letter. This may be useful if you are not able to send reminders via the preferred method.

Update - Jobsheets / Estimates List Screens. The list screens now store history (old/converted Jobsheets and Estimates) which you can refer back to in the future if required. There is a new tab on the Jobsheet and Estimate List Screens which will list the old converted Jobsheets and Estimates. Old/Converted Jobsheets and Estimates cannot be edited, but can be deleted if required. There is also a function button available to search old jobsheets and estimates.

Update - GDS Help System. The help file has been rewritten and is now incorporated into GDS Boat Manager in a context sensitive manner. There is a standard Help button on the main toolbar, and pressing this will give you help on whichever screen you are currently working on.

GDS Boat Manager - Update 28th April 2009

On the Reminders screen, when you choose the Letter Text button to modify the letter, there is now a set of tabs available which allow you to 1) write the letter, 2) preview the letter with sample data included, and a third tab which gives an example of how to use the Markers, and the marker names.

New - System Option to provide a prompt if Reminder/Recall Dates are not updated when saving a jobsheet or sales document.

There is a new option in GDS System Settings, on the Sales Documents tab called Warn on Save if Reminder dates not updated. If the option is set, then if you create and Save a new Jobsheet or Invoice without passing through or updating the Recall Dates, a message will appear when you save the document which asks you if you want to cancel the save and update the Recall/Reminder dates.

GDS Boat Manager - Update 7th April 2009

Update - Stock Parts screen now has the facility to show the Margin based on the Cost price, and the Sell Prices which are specified. Margin is shown as Profit in Pounds/Pence (or Euros) and also as a percentage. The Margin amount can be shown or hidden by pressing the [F8] key on the keyboard to toggle between show/hide.

Update - GDS System Settings screen. There is a new option on the Printed Documents tab to be able to set Print Discounts as off by default. This will prevent any discount amounts being printed on invoices. You can also toggle the option at the time of printing an invoice.

There is another new option on the Sales Documents tab - to be able to add Parts to the Stock Parts list when entering a Sales Invoice. If the option is set, then if you enter a Part number on a Sales Invoice that does not exist as a Stock Item, the system will prompt you whether to add that item to the Stock Parts list. Once the invoice is then saved, the Description and Sell Price will be applied to the Stock Item for future reference.

GDS Boat Manager - Update 6th April 2009

New - Multiple Sell Prices and Discounts can be specified against individual Stock Parts with the prices and discount codes linked to specific customers.

For each Part, you can specify the standard Sell Price as normal, and then you can optionally specify a Sell Price 2, Sell Price 3 and Sell Price 4. You can also specify 3 discount percentages, which are referred to as Disc A, Disc B and Disc C

Each customer in the system can be specified to use alternative Sell Price 2, 3, or 4, and discount A, B or C. When an document is being produced for a Customer, when parts are being specified, the system will lookup the alternative Sell Price and Discount if the customer has them specified. If a Part does not have alternative Sell Prices or Discounts specified, then the customer specific pricing options will be ignored on that particular part.

New - Ability to specify a Default Rate and Default Discount on an Invoice Section / Menu Job.

On the Menu Job screen there is an Advanced Tab which allows you to specify a default Labour Rate and Discount to use when that section has been put onto a document.

You can use this to manage multiple labour rates, as the system will let you have sections that have the same name. You can also use this to automatically enter a discount onto lines under a specific heading if required.

GDS Boat Manager - Update 2nd April 2009

New - Aged Debtors and Aged Creditors Reports. Available from the Reports / Statements menu. The purpose of the report is to show who owes money, and who is owed money (in the case of suppliers) and how old the debt it, based on the original invoice date.

GDS Boat Manager - Update 23rd March 2009

New - Facility to send Reminders by SMS Text Message or Email. There are a new set of options on the Customer screen to specify whether a customer receives reminders via SMS, Email or Letter. All customers default to Letter initially, but this can then be set on a per customer basis. There is a new menu option on the Reminders menu to send Email/SMS Text Message Reminders. To setup the Email/SMS Reminders, there is a new tab called E-Reminders on the GDS System Settings screen.

Email Reminders can be sent once you have entered your name and email address.

SMS Text Messages can only be sent once you have purchased SMS credits.
SMS Credits are priced from 10p each, which represents a significant saving over sending Letters.

Update - Customers Statement - When printing statements for multiple customers, the statement is now print-previewed prior to printing. There is also an Aged Debtor indicator displayed at the end of the statement to display the balance, and it's age.

GDS Boat Manager - Update 21st February 2009

New - Copy Job function on the Menu Jobs screen. While viewing a Menu Job, a new Copy Menu Job button has been added to the toolbar to allow a menu job to be copied/cloned, which may make it easier when creating similar menu jobs that share the same parts lists, or other details.

Update - Unpaid Invoices by Customer report now includes Telephone / Mobile numbers.

GDS Boat Manager - Update 6th February 2009

New - Facility to import or update your Stock Parts records from a Parts file which may be able to be supplied by your motor factor. We are currently able to import a parts and price list from a common format supplied by motor factors who use the MAM Autopart system. The Import Parts file option can be found on the Stock Control menu.

New - Facility to show / hide the Cost Price column on the Parts Lookup screen via the F8 keyboard key. There is also an option in System Settings on the Stock Parts tab to set the Cost Price column to be hidden initially, and the F8 key can then be used to show (and hide) the column on demand. This feature may be useful if your computer screen is in direct view of customers.

New - Facility to store a default Nominal Code and Tax Code against a Supplier. You can enter a default Nominal Code and Tax Code on a Suppliers record, so that any Purchase Invoices which are entered for that Supplier will use the Suppliers own default Nominal and Tax Code, rather than the system default Parts Purchase nominal code.

GDS Boat Manager - Update 20th January 2009

Update Document Lists Reports on the Documents menu now give a Nominal Breakdown of the documents listed. From the documents which are specified in the filter and listed on the report, you can see how much of the total value is made up of Labour, Parts, MOT's etc.

New Quotation Option on the Estimates screen. You can now specify whether an Estimate is an Estimate or a Quotation during the creation or editing of the document. Sometimes it may be more relevant to provide a quote (fixed price) for some work, instead of an estimated price. The printed document will display *** Estimate *** or *** Quotation *** depending on which option is selected.

GDS Boat Manager - Update 13th January 2009

Update Mechanic can be specified against different lines on the Bookings screen. There is a new option in GDS System Settings, Sales Documents Tab to enable Mechanics on Invoice Details. You can then either specify a single Mechanic for a Booking, or enter different mechanics against individual jobs on a Booking.

New Reminder Letter Font / Font Size Option. You can now choose which font is used when generating standard reminder letters. Options are on the GDS System Settings screen, on the Reminders Tab.

New The On Hold Status can be toggled for all Invoices and Purchase Invoices. You can right-click on the Sale Invoice and Purchase Invoice List screen and choose Hold All or Hold None from the popup menu.

Update Sage Purchases Posting Option. You can now choose to have multiple lines, that are on the same Purchase Invoice, grouped together when sent to Sage. The option is on the GDS System Settings screen, on the Accounts Tab. When the option is set, any Purchase Invoice lines on the same invoice which have the same Nominal Code and same VAT Code will be grouped together. This can minimise the amount of detail lines sent to Sage, which can make it easier to pay off Purchase Invoices and reconcile them against a Suppliers statement.

GDS Boat Manager - Update 23rd December 2008

New Mechanic can be specified against different lines on the Invoice Details screen. There is a new option in GDS System Settings, Sales Documents Tab to enable Mechanics on Invoice Details. You can then either specify a single Mechanic for a job, or enter different mechanics against individual jobs on an Invoice.

New Notes on Invoice Part Lines. There is now the ability to store a Note against specific lines on a Jobsheet, Estimate or Invoice. You could use this to store notes relating to a Part Supplier or Suppliers Invoice No for Warranty Details. To store a note against a particular line on an invoice, press the F10 key when on a line to show the Invoice Notes Popup screen. If the line has a Part Ref Code on it, the Part Ref Code will be displayed in blue when there is a note against that particular line.

GDS Boat Manager - Update 15th December 2008

New Global Changes option on Stock Control Menu. Global Changes is a new screen which allows updating of several stock fields in one go. Fields can be increased or reduced by a percentage or a set amount.

GDS Boat Manager - Update 8th December 2008

Minor Update

On GDS System Settings Screen

- Option to print the Customers VAT No onto Invoices

Day of week now prints on Jobsheets

VAT Inclusive rates extended to cover Menu Jobs

New Invoice Search option - The Our Job No field can now be searched on

GDS Boat Manager - Update 18th November 2008

New VAT Inclusive Rates option on Stock Parts and Invoice screen detail lines.

There is now the option to specify the Gross Sell Price for Stock Items, and the system will backward calculate the VAT amount.

For invoice lines which are not Stock Items, you can use the Ctrl + i key combination on the Invoice Details screen to toggle whether the Rate entered includes VAT or not - the default is how the system currently works - in that the Rate does not include VAT. If you press Ctrl + i, or if the Stock item is set to include VAT, the Total figure will be displayed in **Bold** when it includes the VAT

The VAT Inclusive option is useful for when prices are advertised as being inclusive of VAT - e.g. for Tyre sales perhaps, or if you sell Fuel. Trying to enter a non-inclusive Rate and getting the system to calculate the VAT can sometimes lead to rounding problems and make the target sell price difficult to obtain.

GDS Boat Manager - Update 10th November 2008

New Document Finder screen added. There is a new Documents menu on the main menu bar at the top of the screen with a Document Finder option. You can also press the F12 key on the keyboard at any time to show the Document Finder.

You can enter 1 or more search criteria and the Document Finder will find documents in Jobsheets, Estimates or Invoices that match the criteria - be it Document Number, Customer, Boat particular phrase or word used in the Invoice Details.

The search results are colour coded against their document type. You can double click on an item to open that document for viewing or printing.

The default sort order is Document Date. You can change the sort order or sort column by clicking on a particular column heading.

GDS Boat Manager - Previous Updates

Information about previous updates has not been included in this document