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User Guide

Global Appointments, Inc Tracker (GAIT)

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# GAIT Installation and User Guide

# Set Up and Run Application for Maintenance Purposes

Installation of the application can be run from within Visual Studio or via a desktop executable file. The executable file is available via Teams for any GA Inc staff member that needs to install the application on their computer.

Users will need internet connectivity at all times to ensure the application runs correctly since there is a database component tied to the application.

# Steps for Installation

## To install GAIT on your local computer, follow these steps:

1. Graphical user interface, application, Teams

   Description automatically generatedIn Teams, go to the Global Applications Inc Tracker(GAIT) channel.
2. Graphical user interface, text, application

   Description automatically generatedGo to the Files section of the channel, you will see Documents. Open that up and you will see files. At that point you will see three (3) items (shown in screenshot below).
3. Select each of the three items by checking the circles to the left of the items and then choose to download from the top menu. You will want to do this individually for each item in the list.

Graphical user interface, application, email

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1. Graphical user interface, text, application, email

   Description automatically generatedOnce you have downloaded all three items, go to the Downloads section of your computer. You can find that by going to your File Explorer and then selecting Downloads. You will see the items listed in the screenshot to the right:
2. Graphical user interface, text, application, Word

   Description automatically generatedStart with the .zip folder and click on it, when you do you will see an Extract option at the top of the screen:
3. Graphical user interface, text, application

   Description automatically generatedChoose the Extract option and then Extract All on the left side:
4. Graphical user interface, application

   Description automatically generatedAfter you select Extract, you will see a “wizard” which walks you through where you want the files to be located after extraction. Choose the following path seen in the screenshot to the right and then hit select folder and then on the next screen that pops up, hit Extract.
5. Graphical user interface, application, Word

   Description automatically generatedNext click on the setup.exe file and drag it to your desktop. Once that is done, do the same thing with the GI\_Inc.application file.
6. Right click (with your mouse) on the setup.exe file and choose Run as administrator. All users at GA Inc are setup with administrator rights on their computer, so this should not be an issue. If there is a problem with this step, please reach out on the Teams channel for assistance.

Graphical user interface, application

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1. Graphical user interface, text, application, email

   Description automatically generatedYou will then be presented with a Security Warning window that asks if you want to Install or Do not Install. Choose the Install option.
2. A screenshot of a computer

   Description automatically generated with medium confidence After installation, you will see an icon on the bottom task bar of your computer that looks like a computer screen with a white background and blue bar at the top. (See screenshot, it is in between the red arrows).
3. You will want to right click that icon and Pin to taskbar for ease of use each day.

Graphical user interface, website

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1. Once the application installs you will see the following window. This is where you will register for the first time and login daily.

Graphical user interface, website

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# New User Registration

1. Graphical user interface, website

   Description automatically generatedFirst time users will click on the option to register after installing GAIT.
2. Once a user clicks on Register, the following screen will appear and users will need to fill out the form completely before hitting submit. Name, Username, and Password are text boxes that can be typed in. The Department, Time zone and Country are drop down fields. Users will choose from the options listed. PLEASE make sure you remember your password chosen!

Graphical user interface

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***Diagram

Description automatically generatedNOTE: Usernames cannot be duplicated, the application will alert a user if that username is already taken. Suggestion is to use the below for username unless there is a duplicate. Usernames and passwords have to be a minimum of 4 characters.***

1. Once a user has filled in all sections of the New User Registration successfully, you will see a message that Registration was successful. Any other message will indicate what the issues were and they will need to be corrected before hitting submit again.

Graphical user interface

Description automatically generated

1. You can click “OK” on the Registration Successful message and the application will default back to the Welcome Form, you are now ready to Login!

# Logging In

1. From the Welcome Screen choose Login. You will need your username and password each time you login to the application.

Graphical user interface, website

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1. Enter your username and password on the login screen. If you fail to enter the correct information, you will receive an error message and will need to Reset the form and try again.

Graphical user interface, application

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1. Once you have successfully entered your username and password and hit the Login button, you will see the Dashboard. You are now ready to use all the features of the GAIT application!

Graphical user interface, application

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# Working in the application

### Dashboard

1. From the Dashboard, you can see there are 3 main sections.
   1. Section 1 has links for all features of the application. Adding/Modifying/Deactivating Customers, Adding/Modifying/Deactivating Appointments, and Reports
   2. Section 2 shows all upcoming appointments. Listing the customer ID, Type of appointment, start time, and agent information.
   3. Graphical user interface, application

      Description automatically generatedSection 3 allows you to Exit the Application.

### Customer Section

#### Add Customer

1. When you click on the Add Customer link you are taken to a form that is blank and allows you to type in all information for a customer. All fields but Address 2 are required.
2. Once you have gathered all of the information and entered it on the form, hit Save.
3. You are then notified that the customer was added successfully and asked if you would like to add another customer.
   1. If you choose ‘yes’, the form will reopen and be blank.
   2. If you choose ‘no’ you will be directed back to the dashboard.

Graphical user interface, text, application

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#### Modify Customer

1. When you click the Modify Customer link you are taken to a form that has a list of all customers currently in the database with their current information. Choose a customer from the list and their information will populate in the boxes.
2. Graphical user interface

   Description automatically generatedMake any needed demographic changes then hit Update.
3. You will then be notified that the customer information has been updated.
4. Hit ‘OK’ and you will be returned to the dashboard.

#### Deactivate Customer

1. When you click the Deactivate Customer link you are taken to a form with all active customers listed.
2. You can select a customer by clicking anywhere on their row of information.
3. You will then be asked if you are sure you want to deactivate this customer.
   1. If you click Yes – you will then need to click the Deactivate Customer button to complete the process.
   2. If you click No – You will be prompted to choose a customer to deactivate.
4. Once you choose and customer and have selected the Deactivate Customer button, you will receive a message that the customer was deactivated, click OK on that message and the list will repopulate with only active customers.

Graphical user interface

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### Appointments

#### Add Appointment

1. Graphical user interface

   Description automatically generatedWhen you click the Add Appointment link you are taken to a form that is blank and allows you to select a customer from the customer dropdown.
2. Once you choose a customer from the list, you can then select an agent for the appointment.
   1. Agents are listed with their name and agent ID.
3. The appointment type and appointment location are drop down boxes that allow you to choose the correct options for the appointment.
4. Description is a free text box that allows you to put information in about the appointment.
5. The current date and time are listed in the Appointment Start date/time and a default of thirty (30) minutes from that time is listed in the Appointment End date/time.
6. Once you have everything filled in, hit the save button.
   1. If the appointment conflicts or overlaps with another appointment you will be given a notification on screen and will need to choose another time.
   2. If the appointment is outside of normal business hours (8am to 5pm) you will be given a notification on screen and will need to choose another time.
   3. If there are no issues, you will be given a notification that the appointment was created and you will be directed back to the Dashboard.

Graphical user interface, text, application

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#### Modify Appointment

1. When you click the Modify Customer link you are taken to a form that has a list of all customers currently in the database with their current information.
2. Choose a customer from the customer drop down and all their appointments scheduled for a future date will be available to choose from in the Select Appointment dropdown.

Graphical user interface, text, application

Description automatically generated

* 1. If a customer has more than one appointment, you will see all of the future appointments in the dropdown. Choose one to modify and the appointment details will populate on the form.

1. If you need information on agent ID’s there is a look up form on the Appointment Modify screen.
   1. Input the ID number in the box and select “Search AgentID”. The row containing that agent ID will then be highlighted. You may have to scroll down in the list to find it.
   2. Table

      Description automatically generatedThis lets you know which department agents are in as well as if they are active.
2. Once you have updated any needed information on the appointment, click the save button and you will receive a message that the customer appointment has been modified.
   1. If there are errors with the appointment modification, those will appear on the screen and indicate what needs to be corrected. Make those changes and then hit save again.

Graphical user interface, application

Description automatically generated

#### Deactivate Appointment

1. When you click the Deactivate Appointment link you are taken to a form with all active appointments listed.
2. You can select an appointment by clicking anywhere on their row of information.
3. You will then be asked if you are sure you want to deactivate this appointment.
   1. If you click Yes – you will then need to click the Appointment Deactivate button to complete the process.
   2. If you click No – You will be prompted to choose an appointment to deactivate.
4. Once you choose an appointment and have selected the Appointment Deactivate button, you will receive a message asking if you are absolutely sure you want to deactivate this appointment.
   * 1. If you select No, you will have to reselect an appointment to deactivate.
     2. If you select Yes, you will receive a message that the Appointment was deactivated. The list will reload after you click ‘OK’ on that message.

Graphical user interface, table

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### Agent Information

Clicking on the Agent Information button brings up a full list of active agents with their Agent ID, Name, and Department.

Other than viewing, you can deactivate an agent from this form. To do that, follow these steps.

1. Click on the agents ID or Name and you will see a message asking if you are sure you want to deactivate this agent.
   1. If you click ‘No’, you will be prompted to choose an agent to deactivate.
   2. If you click ‘Yes’, the first message instructs you to click the Deactivate Agent button which has now become functional.
2. Click the Deactivate Agent button and you will receive a message that the Agent was deactivated. Click ‘OK’ on that message and this list will reload with only active agents.

### Appointment Reports

Note – All of the reports are view only, no changes can be made to any of the data in the reports.

#### Appointment Type Report

This report shows two boxes.

1. The box on the left lists all appointments with their type and date. The list can be sorted by type or date by clicking on the column heading. When you click on the column name, you will see a small triangle that points up or down which allows you to sort ascending or descending in each column.

Table

Description automatically generated

1. The box on the right list’s numbers of appointments by month for technical support and sales. This is a quick snapshot of how many customers each department is working with by month.

A picture containing table

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#### Appointments By Week Report

This report gives you options of start and end date/time to view a list of appointments.

By default the report is set for 1 week, if that is the time frame you need all you have to do is select the ‘View’ button to see the list.

1. Select a start date and time by clicking in the box below Start Date and Time to View Appointments. You can choose the date from the calendar icon as well, but the time will have to be typed in. By default the date is the current date and time is 12:00 AM.
2. You can also select an end date and time for the report by following the same process above on the End Date and Time box. That default is set for 7 days in the future.

A picture containing application

Description automatically generated**NOTE: The start date must be before the end date for the report to generate, if you choose a start date after the end date you will receive an error message.**

#### Appointments Sales Report

Similar to the Appointments By Week report, you have the options of start date and end date for the sales report.

By default the report parameters are set for one week, so if that is the date range you need all you have to do select the ‘View’ button to see the report.

1. To change the start or end date of the report, use the calendar icon on the date bar.
   1. Click on the icon and a calendar will pop out that you can choose any date from.

**NOTE: The start date must be before the end date for the report to generate, if you choose a start date after the end date you will receive an error message.**

Diagram

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### Customer Reports

Note – All of the reports are view only, no changes can be made to any of the data in the reports.

#### Customer By State

This report shows all active customers by city and state with their name and customer ID number.

The report default has the customers listed by state, you can sort the list as needed by clicking on the column name (CustomerID, Name, City or State) and then you will see a small triangle.

If the triangle is pointing up, the list is sorted by ascending or A-Z order.

If the triangle is pointing down, the list is sorted by descending or Z-A order.

A picture containing graphical user interface

Description automatically generatedYou can click on the column to change the direction of the sort(the way the triangle is pointing) to change the sort order.

#### Customer By State

This report shows all customer emails with name and customer ID.

The report default has the customers listed by customer ID, you can sort the list as needed by clicking on the column name (CustomerID, Name, or Email) and then you will see a small triangle.

If the triangle is pointing up, the list is sorted by ascending or A-Z order.

If the triangle is pointing down, the list is sorted by descending or Z-A order.

You can click on the column to change the direction of the sort(the way the triangle is pointing) to change the sort order.

Table

Description automatically generated

#### New Customers

This report shows all new customers within a date range.

By default the report parameters are set for one week, so if that is the date range you need all you have to do select the ‘View’ button to see the report.

1. To change the start or end date of the report, use the calendar icon on the date bar.
   1. Click on the icon and a calendar will pop out that you can choose any date from.

**NOTE: The start date must be before the end date for the report to generate, if you choose a start date after the end date you will receive an error message.**

**Text

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