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1. Software Overview

Without good programs, computers would amount to little more than expensive paperweights. Computer hardware needs to be told what to do and how to do it. The computer programs or software are multiple lines of instruction (also called code) that tell computers exactly how to work in a given situation. These lines of code are not anything a user has to be concerned about since they have been assembled into what appears to be a single seamless program. When a program behaves poorly or does not respond properly in a given situation, this is referred to as a "bug". All computer software programs have bugs and computer programmers are continually improving and removing bugs. These new and improved versions are marketed as upgrades.

Operating Systems

Software can be divided into different categories. The first is the operating system. Referred to as DOS, the disk operating system is a program that tells the hardware how to run, store, and retrieve other programs. There are several different vendors of DOS but the largest and most popular is Microsoft's MS-DOS. Microsoft's MS-Windows is also a popular operating system. The computer should have its own DOS manual and it will explain the DOS commands. To run P.O.S. LINKER only, any necessary DOS commands will be explained. DOS allows the computer to run as a stand alone system. If a single computer is to talk or network with other computers and terminals then a networking operating system (NOS) will also be needed.

The major types of networks are peer to peer, server, and *multiuser*. Blue Ridge POS, LLC uses a multiuser disk operating system called Real/32. This is by far the most cost effective way to set up a network we have found. The hardware and cabling requirements are meager compared to similar sized networks using some of the alternative schemes.

Another big benefit of multiuser DOS, or Real/32, is that it is MS-DOS compatible. That will allow hundreds of other popular DOS and Windows programs such as word processors, spreadsheets, communications programs and even games to run on the same computer.

DOS is also a *multitasking* operating system. This means numerous different programs can run simultaneously on a single computer, with the capability to instantly switch between them. You could write a letter in your word processor, sell a part, create an order, and do your billing all at the same time. It is especially powerful when used with one of the popular parts lookup and imaging programs saving valuable time loading programs or switching computers.

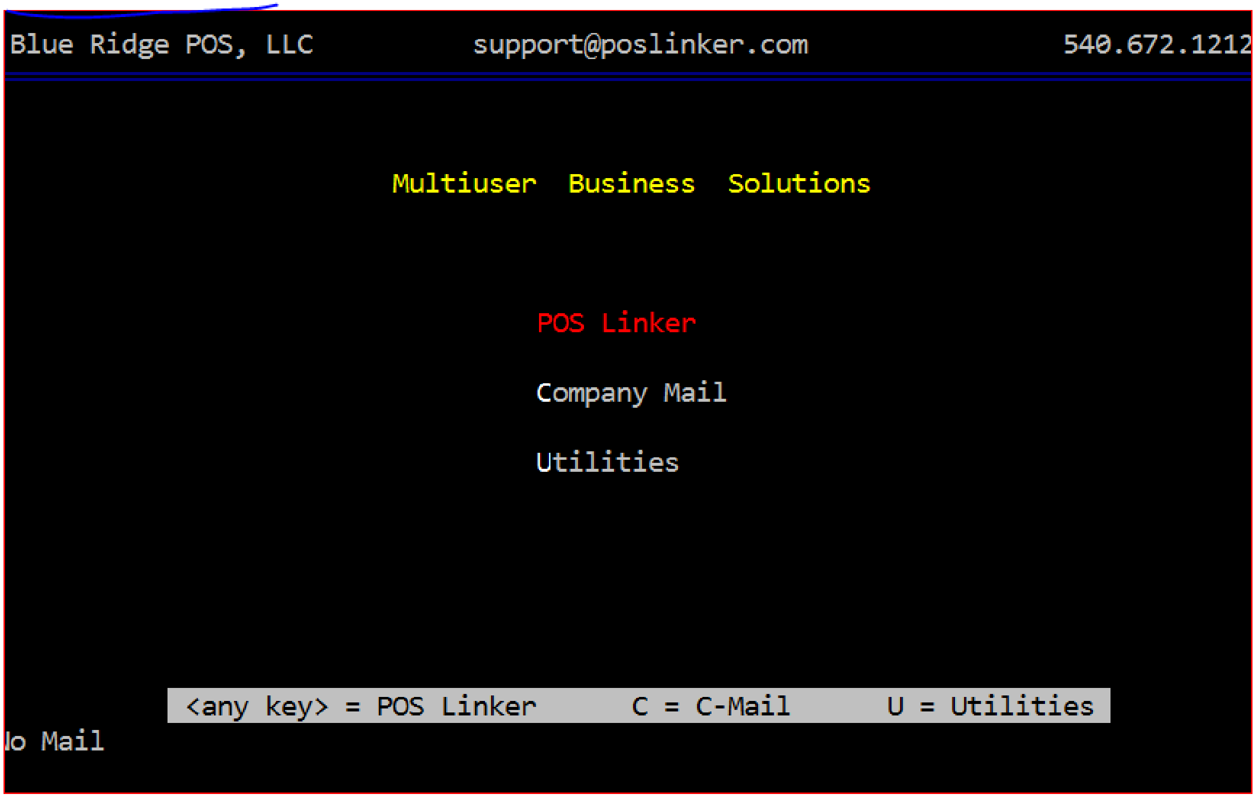
Software Programs

The P.O.S. LINKER program is a complete software solution written and developed primarily for the power equipment industry. The authors have been in the ag and power equipment business and learned this business from the inside out. Since the first computer installation in early 1985, Blue Ridge POS, LLC has continued to build and enhance the program. The running of the software itself will be fully covered in the following chapters.

There are many other programs available. They may either be purchased from us or from other vendors. A word processor is usually one of the first programs selected. It will produce very professional letters that can be saved and recalled or reprinted instantly. A communications program is also useful for accessing Computer Bulletin Board Systems (BBS). A spreadsheet is sometimes helpful to manipulate many columns of numbers. An art design program could be used to create personalized ad copy. The best way to decide what might be useful is to talk to others using that particular software package and if possible try it out first to be sure it is the right solution. There are also numerous computer magazines that frequently feature reviews of many different programs. Odds are there is a program already written that can provide a solution. If not, software languages are available to write the needed program. P.O.S. LINKER is written in a fourth generation database language called Q-PRO 4 and is available for purchase from Blue Ridge POS, LLC.

2. System Utilities

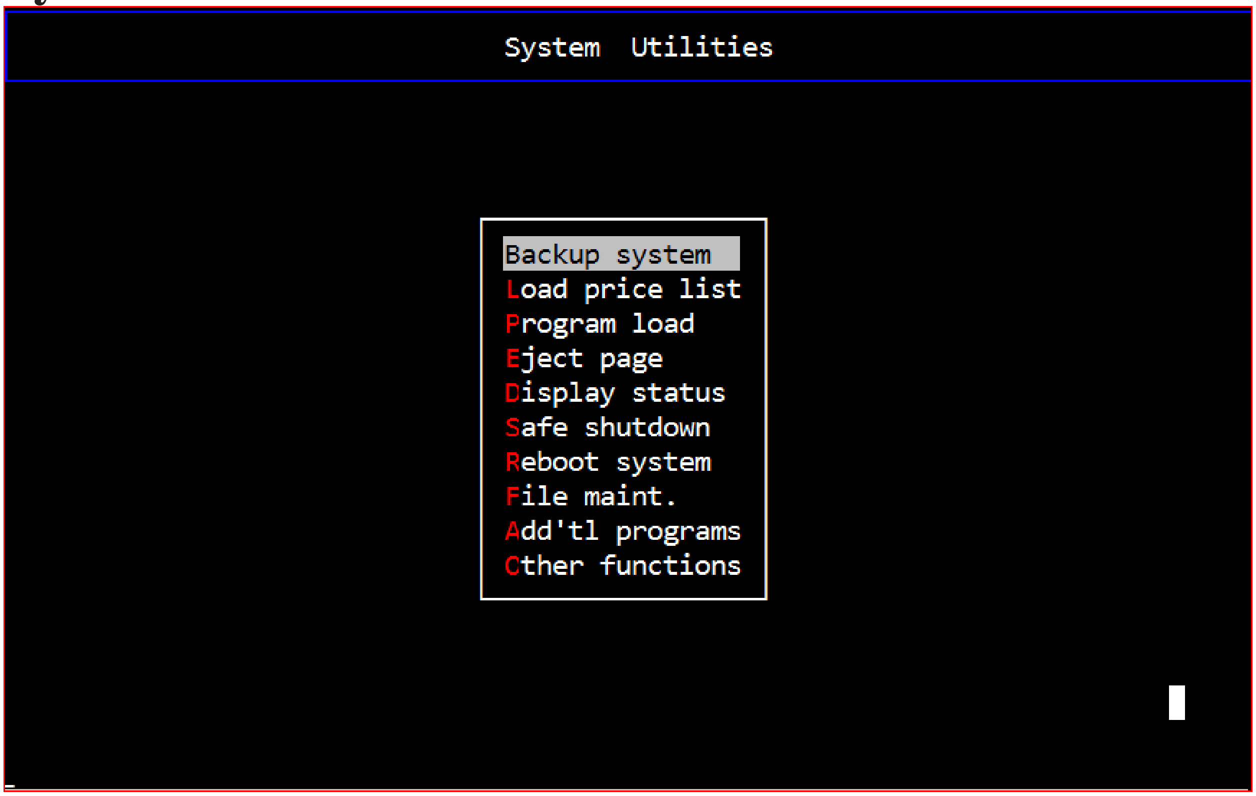
Menu Screen



u

The latest release of POS Linker, has a very user-friendly menu screen. The menu choices are very self-explanatory. Any key, except “W”, “C”, or “U”, will launch the familiar POS Linker program screen. “U” will launch your System Utilities.

System Utilities



Backup system: This selection replaces the old DOS "back" command. After closing out daily activities shut down your system and reboot to DOS. (See "Re-boot System" and answer "no" to the load Real32 question) Make this selection to backup your system in DOS.

Load Price List: Loads the newest price update files onto your system. Simply load price disk into your floppy drive and choose this option. All other users should be off the system, and the monitors should be at the main menu screen.

Program Load: This selection will load any new program updates sent to you from BRPOS, LLC. Simply load disk into the floppy drive and choose this option.

Eject Page: Used when a page has finished printing, but the printer has not fed the page to the perforation. This option is used primarily with ink jet printers.

Display Status: This option is similar to the "show" command. It will display system information for the printers, disk drives and programs. This option is only valid with Real/32 , multi-user DOS operating systems.

Printer: this selection displays each printer, the printer owner and station. This is helpful when the system displays a printer error, or locks the printer. This option will help you determine which channel or program "owns"a printer so that it may be released and used.

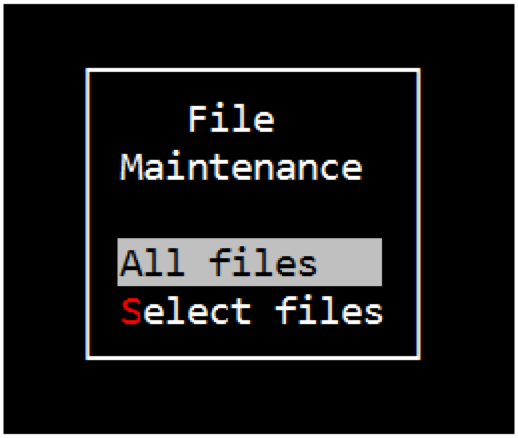
Disk Drives: displays available bytes for each drive and actual size for each drive.

Programs: displays the program running on each channel of the system.

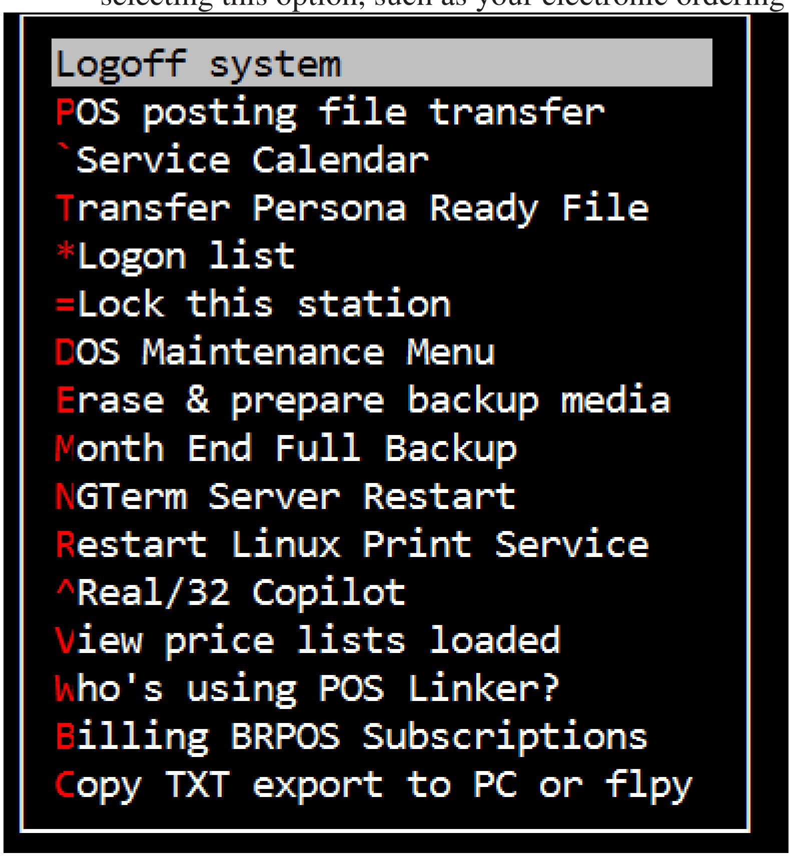
Safe shutdown: This feature is no longer available.

Re-boot system: Allows you to "re-boot" the system in Real32 without turning it off & on. This option is used at the end of the day so that you can load DOS to run your back-up.

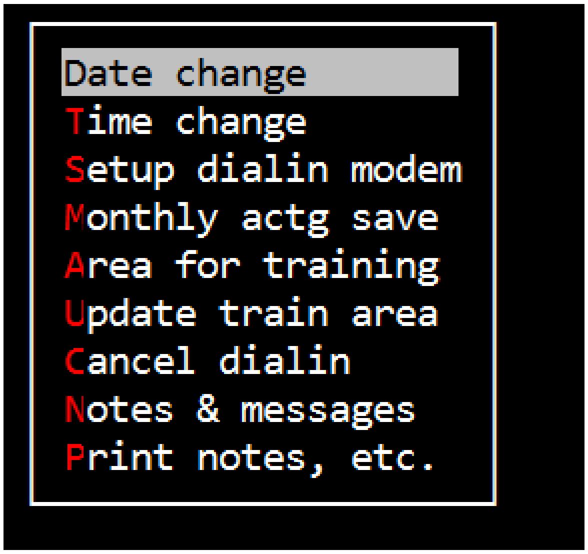
File Maintenance: Allows you to rebuild all POS Linker files or to choose individual files. Rebuilding files should be an integral part of your month-end procedures. If this is not done regularly, the information access time of the system will get slower.



Addt'l Programs: This portion of the new menu system is completely customizable. BRPOS, LLC can set up any number of operations to automatically run by selecting this option, such as your electronic ordering capabilities or imaging



Other Functions: Miscellaneous system functions.



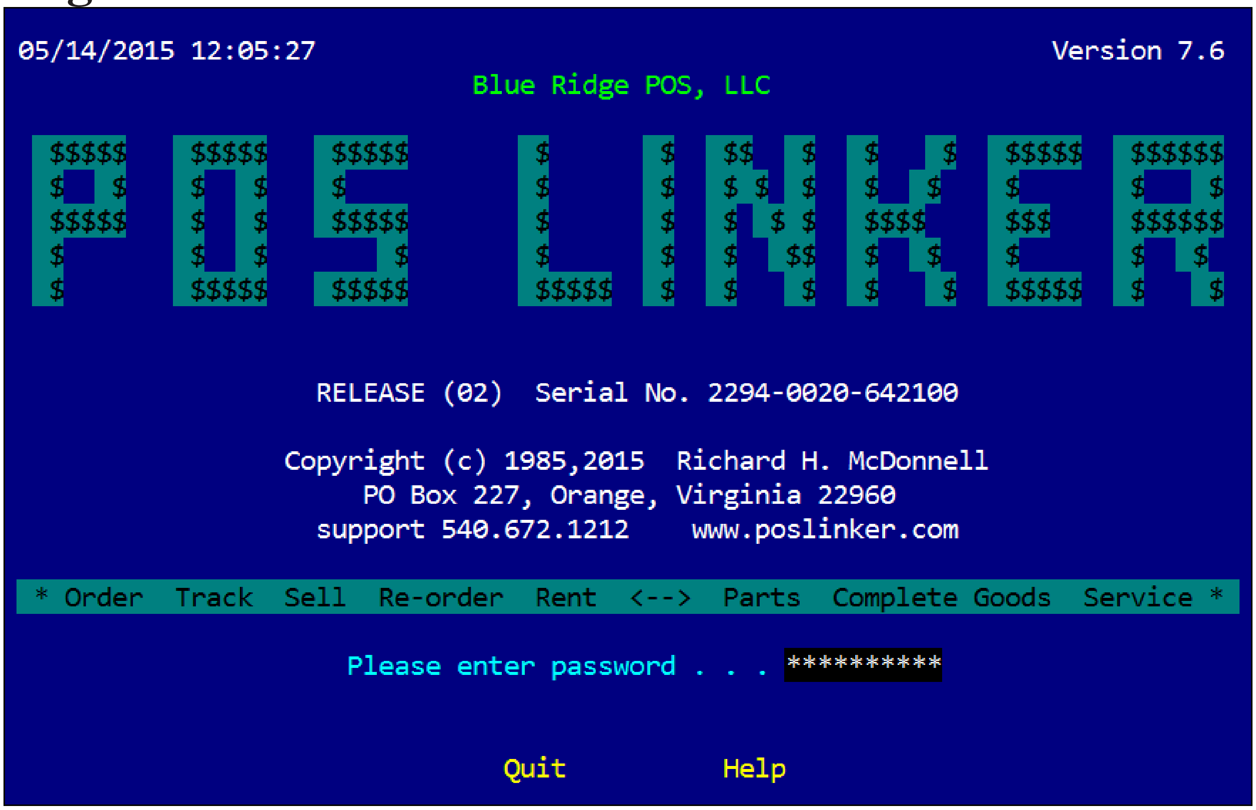
Date Change: changes the system date.
Time Change: changes the system time. Ex: Daylight savings time
Setup Dialin modem: automatically sets the system for "callme" dial-in status so that BRPOS, LLC can dial-in to diagnose problems or update files.
Monthly actg save: allows the user to save either the A/R, G/L files or both.
Area for training: "Learn" directory. Allows the user to explore menu options or capabilities in a training directory without affecting the business system directory or files. This screen will be Blue and white with no additional color.
Update train area: imports the current information from the business system so that the training area will contain current information. All users must be off the system in order to update.
Cancel dialin: de-activates the automatic telephone modem answering system.
Notes & Messages: Works like a clipboard that you can use to type notes on. Office email is one example of this feature.
Print Notes: allows user to make hard copy of notes & messages.

Note: You may select any of the above options or functions by using your arrow keys or by selecting the appropriate highlighted letter. The ESC key will back out of any menu.

Starting P.O.S. Linker

It is usually the responsibility of a designated and trusted person to turn on the computer at the start of the day. This person will have some password authorization. Here we will cover loading and running the program.

Login Screen



Please enter password . . . ____________

The system is waiting for a valid password in order to allow access to the system. The secret password will not be displayed as it is typed. If a mistake is made typing, the left arrow key can be used to backup and retype bad keystrokes. After typing all password characters, 

is used to tell the system and to validate the password entered. Invalid passwords will be rejected and you will be allowed two more attempts. This field is not required. If you get a red banner saying "caution previous days transactions……." Or any other banner pressing escape 

will take you to the next screen. Make sure you have read and addressed the warning!

Note: Read the screen! It tells you what's going on!

Special function key command values are noted at the screen bottom or right side. These have global access—That is they may be pressed anytime. Fields (areas the cursor enters) may have several traps set to check what is entered. For example the program would not allow letter keystrokes where it expects numbers, as in a dollar amount. Just follow the instructions that pop up at the bottom of the screen. *Bad keystroke* messages refer to an alpha keystroke in a numeric field or vice-versa. If the data entered does not completely fill the field, press ENTER or TAB to leave the field.

Press F1 for assistance; a series of Help screens with instructions for entering data will appear, as well as, how to access the next Help screen. At the end of the series of Help screens, the following will appear: *End of Help* <Press any key>. At this point pressing any key will cause the data entry screen to reappear.

Help - Press F1

Pressing F1 Help from the Login Screen, will access a series of five General Help Screens which provide information about keyboard entry. Most questions can be answered by reading the screen and following the error messages or referencing the help screens from the appropriate area.

Typing Characters

In general all alphanumeric keys (including lower-case or capital) can be pressed in addition to the following keys: arrow keys ← → ↓ ↑ TAB, function keys

F1 F10 PG↑ PG↓,

DELETE INSERT HOME END

NOTE: DO NOT USE PAUSE, SCROLLLOCK, or SETUP.

SINGLE KEY INPUT*:* When the system is waiting for the user to respond, it is anticipating a single key entry. This may be a Y or N (denoting Yes or No) in response to a question, or a letter or number referring to a choice from the menu displayed. Do not press ENTER

FIELD INPUT: Each field is terminated by the TAB or ENTER key or when the field is filled. On most screens typing may continue into the next field. Thus, field length should be carefully observed in the name file. It is a good habit to learn to read what is typed on the screen to check for any errors before saving the data entered.

Dollar Values

Enter money amounts in decimal form. Numbers entered without a decimal are assumed to be whole dollar amounts. For example: if the user enters “123” the system assumes “$123.00”

Therefore the computer would interpret

- 123.45 as $123.45
- 123.4 as $123.40
- 12345 as $12345.00

Any field can be cleared from the cursor position to the end by pressing simultaneously either CTRL END in DOS in windows or pressing CTRL K in Real/32. More than one decimal in a numeric field is illogical and will self-correct or prompt an error message. Experiment in a numeric field to learn.

Entering Dates

DATE INPUT: System date form is MM/DD/YYYY where:

- `MM = month number`
- `DD = day of the month`
- `YYYY = the year`

For example: May 15, 2016= 05/15/2016.

Default Responses

Most of the user choices will be provided with default responses. These are choices set by the system to make entry faster and easier. The default response will appear in the field designated for a user response. To accept the default, simply press the ENTER or TAB key when the cursor is at the response field. To override the default entry, just type over it.

Saving Data

Keyboard input is displayed on the screen as a work area or input buffer. To make the contents of the screen permanent the data must be saved. This is done by pressing “End”. END

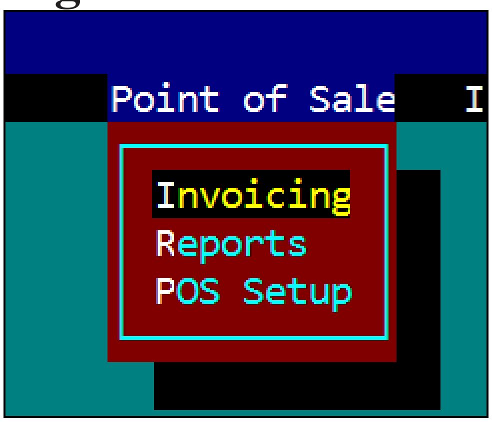
Field Editing

The following keys can save time for those persons that do not type well:

TAB or ENTER will exit the current field. DEL Delete removes a character at the cursor. Any characters to the right will move one position left to replace the deleted character.

INSERT Inserts a blank space at the cursor. Any characters to the right will move one position right. backspace is similar to DELETE. The characters to the left of the cursor are erased one at a time as the cursor moves backwards dragging any data to the right with the cursor.

Lightbar Menus



POS Linker allows the user several different ways to get around the program. This is to allow maximum flexibility and to give users an interface that is both easy to use and learn. It is almost intuitive, even to brand new users. It is referred to as lightbar menus or point and shoot.

Selections can be made two ways:

1.Move the highlight bar with the arrow keys to the selection and press ENTER

2.Or press the colored or highlighted capitalized letter that appears in the list.

Pressing ESC will make no selection and back out of the current selection list or screen.

Pressing F1 help key will bring up the Main Menu Help Screen which provides information on using the arrow keys to move the lightbar and highlight selections. It also has Blue Ridge POS, LLC's phone number and address.

Pressing ENTER will select the highlighted choice from the menu.

Pressing ESC again after having backed out of the current list makes no selection and brings up the Quit Menu.

Point & Shoot Popup Windows

TAB or ENTER will select the highlighted data record.

PG↑ or PG↓ moves data in the display window a full page down or up if additional data exists.

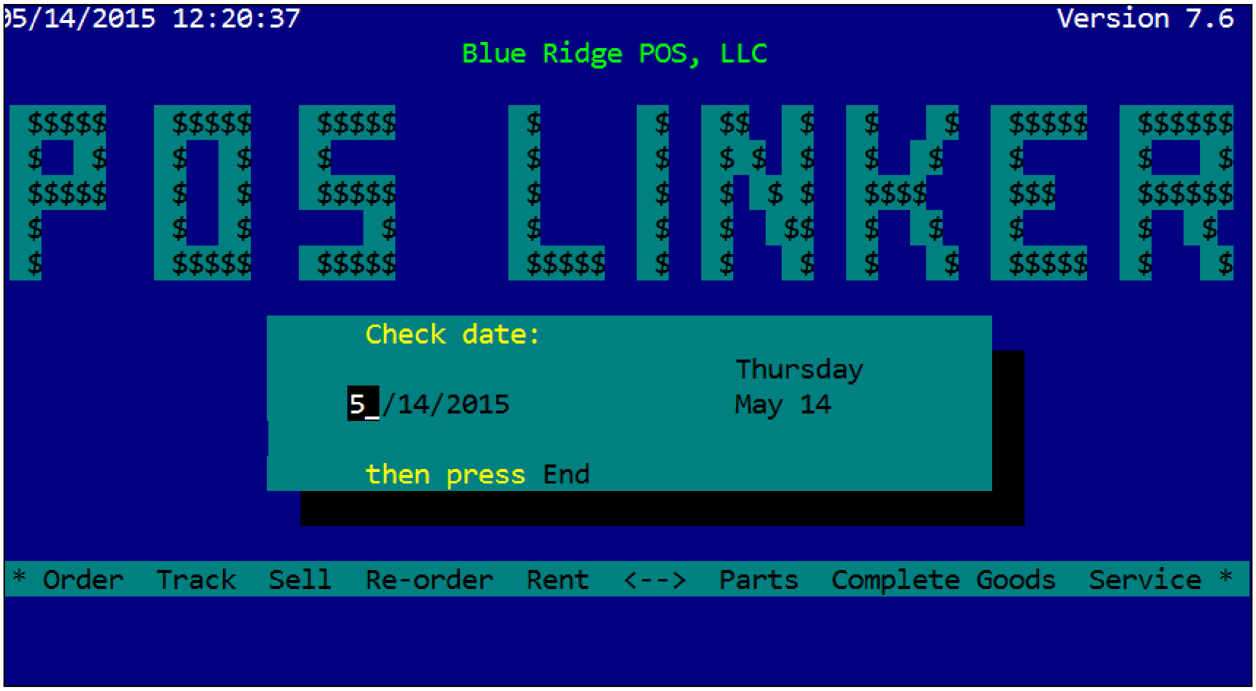
ESC makes no selection and closes a menu or backs out of the current screen.

Any key will immediately position the window data relative to the key pressed. For example, in a lookup field, if the letter J is pressed, then the data field would start with the first "***J***" entry.

← → ↓ ↑ arrow keys are used to move the lightbar up and down the data records displayed.

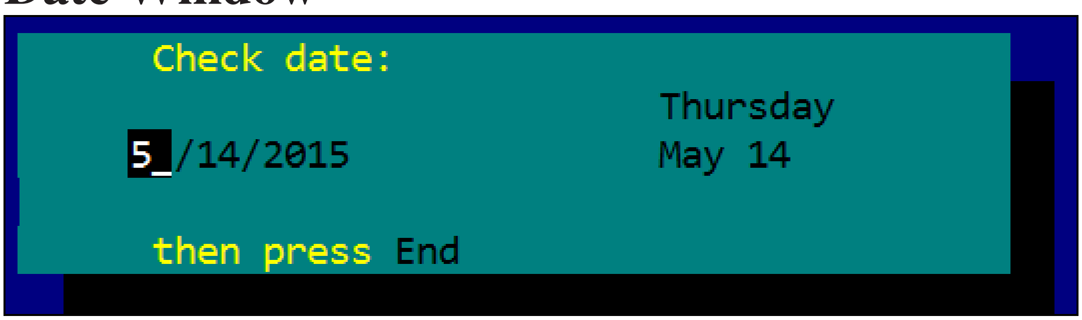
Note: Care should be taken to type an uppercase letter to match words that are capitalized (such as last names).

Date Screen



The system date and time of day must be correct to maintain accurate transaction tracking and reporting. Computers with battery-powered clocks maintain system date and time while the computer is turned off. In this case, date and time are merely checked by the manager. A weak battery could cause the clock to slow during power off. Computers without battery-powered clocks lose date and time at power off. On such units this system remembers the previous date setting and displays that date and time. Managers must advance the date.

Date Window



The cursor is on the digital date display (month, day, and year). The date in english appears to the right. Digital date may be changed by typing numerals within the following ranges: MM - Month (01-12) DD - Day (01-31) YYYY - Year (1888-2068) Pressing END at any time will process the digital date displayed. If the date is changed, a dialog box will confirm this.

Press F1 for the Date Help Screen.

NOTE: This is one place where the date and time can be changed for daylight savings and standard time, in Concurrent DOS only.
Please refer to your computer owners manual on how to setup the time and date. This will allow the computer to retain the date and time when it is switched off.

Time Window

The system date and time of day must be correct to maintain accurate transaction tracking and reporting. Computers with battery-powered clocks maintain system date and time while the computer is turned off. In this case, date and time are merely checked by the manager. A weak battery could cause the clock to slow during power off. Computers without battery-powered clocks lose date and time at power off. On such units this system remembers the previous time setting and displays that time. Managers must advance the time manually.

The cursor is on the digital time display which is followed by either AM or PM and the day of the week and month for reference. Type over the displayed time using the following ranges:

- **hh** – hour (01–12)
- **mm** – minutes (00–59)
- **ss** – seconds (00–59)

Be sure to set either AM or PM if necessary.

Switching Channels

With the Real/32 multiuser DOS system, more than one person can run several applications at a time. (See page 5- 2 for more detail). To switch channels, simply hold down the CTRL key and press a number on the numeric keypad. (The calculator style keypad on the right hand side of the keyboard)

3. Point of Sale Menu

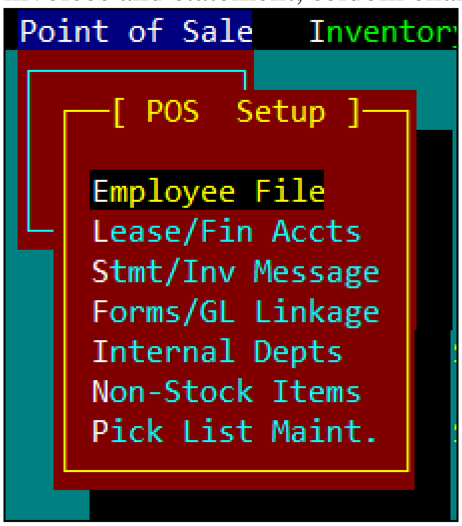
In the POS LINKER Main Menu Screen, the highlight bar is on Point of Sale and the corresponding subtopics--*Invoicing, Reports,* and *POS Setup* are available for selection.

The first step in using your new system is to set up all users. These will be all employees who will be using the system. Using your arrow keys, or the letter "P", select POS Setup. This choice will pull up another menu screen. Select "Employee File". The "Employee File" will allow you to setup your employees in the system.

Some screens require employee/operator initials to open, such as the invoicing screen, and shop employees will be tracked by their initials for service/labor hours. You may enter each shop employees' service rate and code the charges under "Sold as" for invoicing by using their initials followed by "SV". For example: Employee: “John Doe” Service code: “JDSV”

POS Setup

The POS Setup screens allow the setup of the invoice, statement, general ledger accounts, special charges, and employee tracking. Generally, this area is setup during installation of the computer system and with the exception of the messages printed on the invoices and statement, seldom changes.

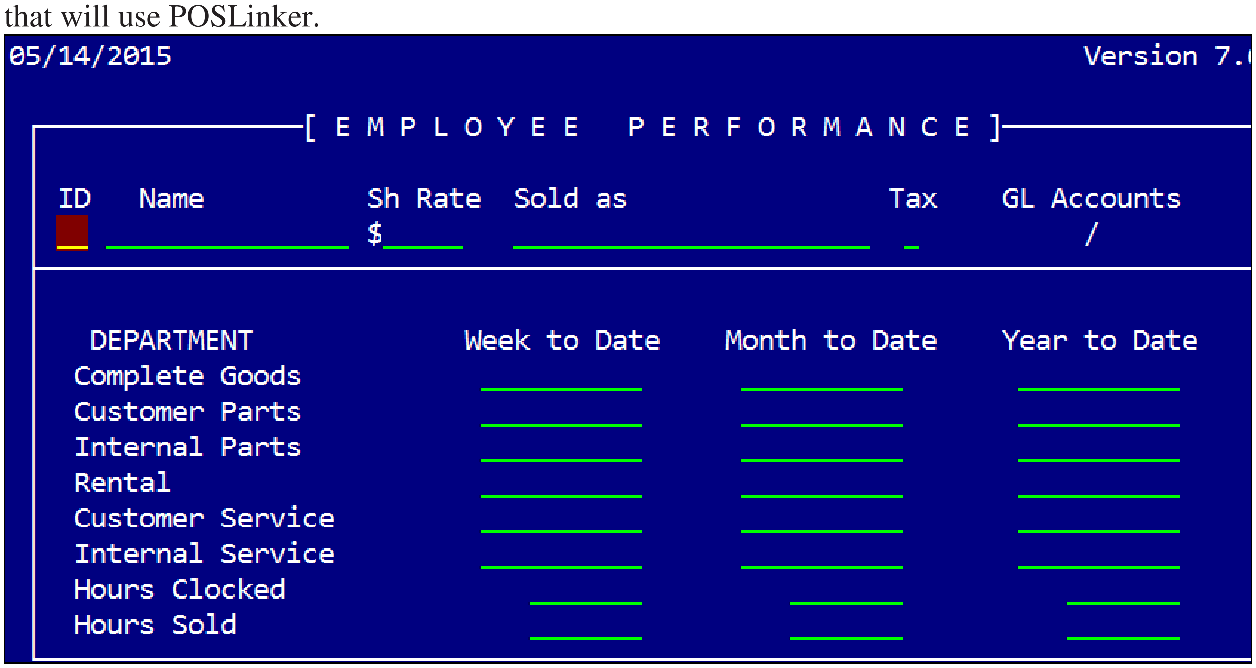


"Sold as" should be left blank when an employee's labor is never sold. Each time you enter a new employee, press 

to save the information. No two employees can have the same initials. After all employees are entered, hit 

to get back to the main menu. You are now ready to start setting up your system and begin utilizing POS Linker.

The "Employee Performance" screen is filled out with the names of all personnel that will use POSLinker.



POS Setup - Employee Performance

The sales performance of employees is tracked in different departments by the week, month and year. This feature can be used to track performance for possible incentive pay, bonuses or commissions.

To setup employees:

ID - a two character alpha field that represents an employee. Ex: JD - John Doe
Name - Type the name of the employee.
SH Rate - Enter the shop rate this employee's labor is sold as, or if this amount varies, leave blank and fill in manually on each service ticket.
Sold As - Enter the description to appear on each ticket when selling this person's labor. Anything entered in this field, enables labor sales. Persons that do not sell their labor should leave this field blank.
Tax - Enter "Y" or "N" if labor is taxable or not.

Hit END to save all information.

The rest of the fields are system maintained and will change
with each invoice processed.

Employee Tracking

To initialize the tracking feature, at the Employee Performance screen
press F5 - menu.

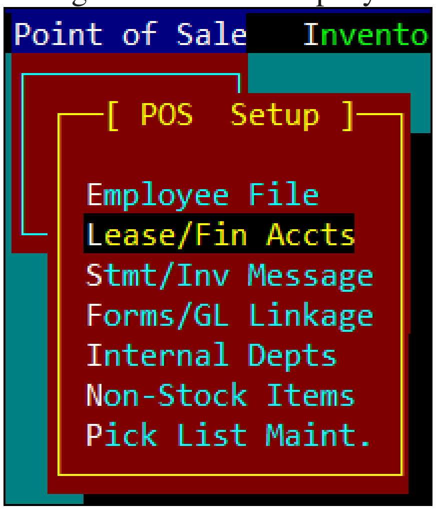
Print the desired report for your records. Once you have printed your selections, you may "close-out" your week, month or year. "Closing-out" enables you to keep an accurate running total for the week, month and year because it resets the department sales totals to zero (0).

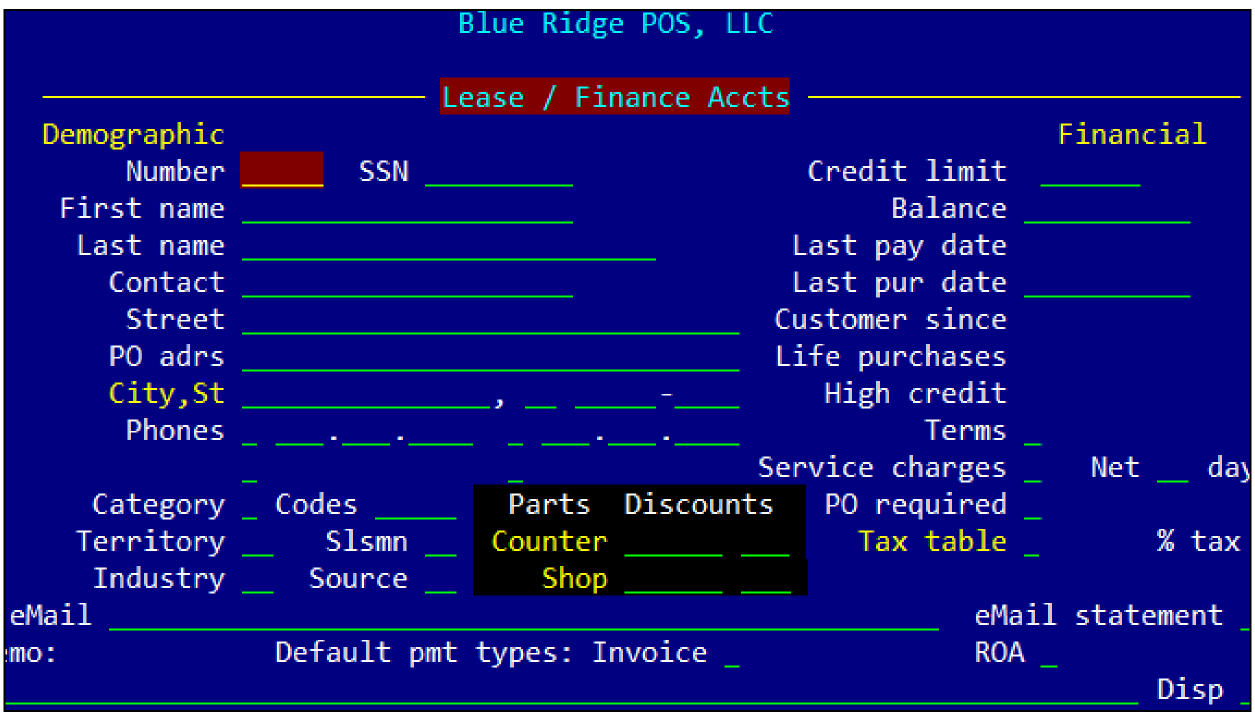
It is a good idea to close-out your week at the ***same time*** every week so that each report contains the same number of days. For example, if Saturday is your last day of the week, close-out Saturday afternoons along with your regular daily closings.

It is also a good idea to close-out the last *week* of the month *with the month*. In other words, on the last day of the month, press F7 to close-out your week, and then press F8 to close-out your month. The same would be true for the end of the year. For example, you would close-out the last week of December with month close-out as well as the End of Year close-out.

Lease/Finance Accounts

Lease/Finance accounts are set up for equipment sales through the manufacturer or a leasing company. This feature can also be used if you, the dealer, wish to set up financing through the dealership. Setup your company information the same way you would any other finance company. The POS system enables you to process the sale through the finance company and retain the customer sales information as well.



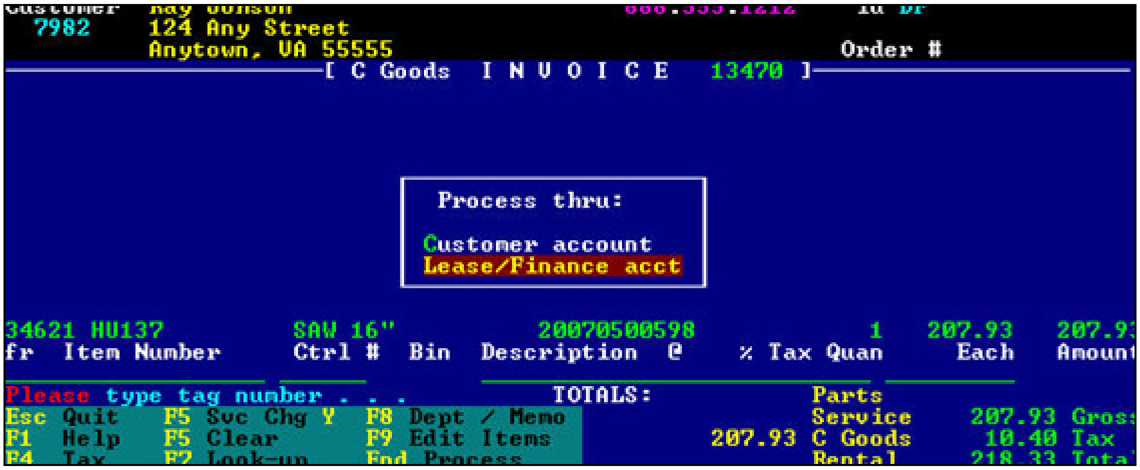


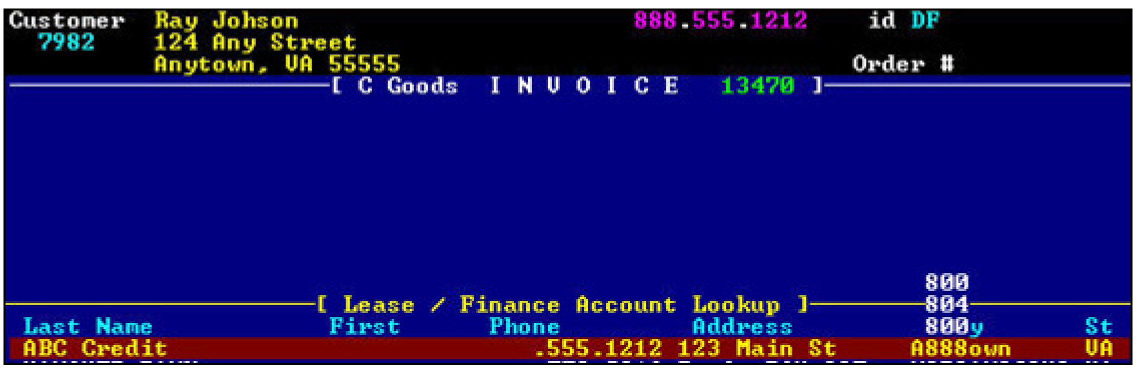
Setup:

a) Select Lease/Finance Accts.
b) Enter the lease/finance company information
c) Set Terms = Invoice and Service Charges = No
d) Press END to save

Process Lease/Finance Sale:

a) Initialize the complete good invoice through the customer's account, At the processing screen; the system will prompt you to select the Lease/Finance account.

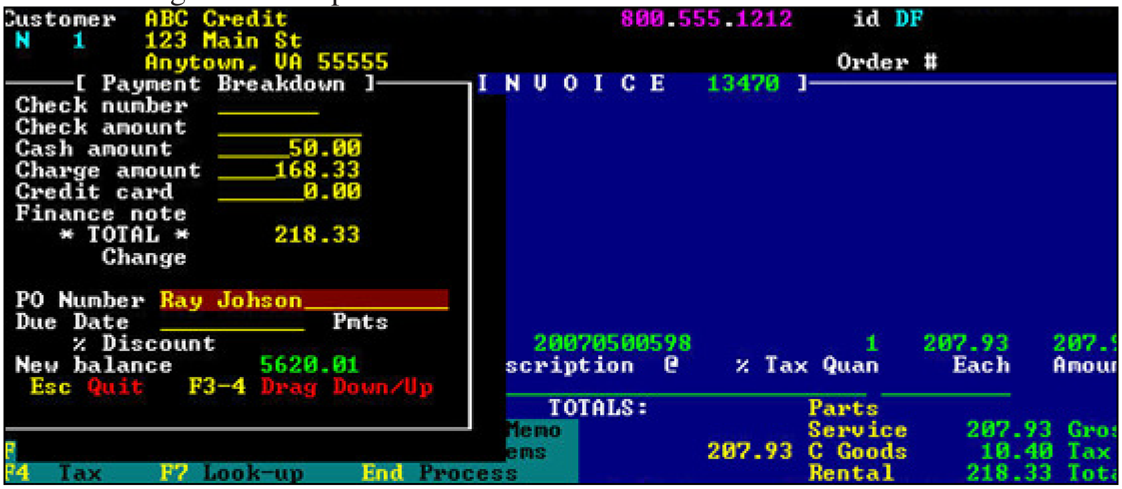




b) At the Payment Breakdown window you will process the total of the sale as a "Charge" to the Finance company you selected.

If the customer put a down payment on the unit you will enter that amount in either, the check, cash or credit card field. The down payment amount will reduce the charge amount to the finance company selected.

The following is an example of a Lease/Finance sale:



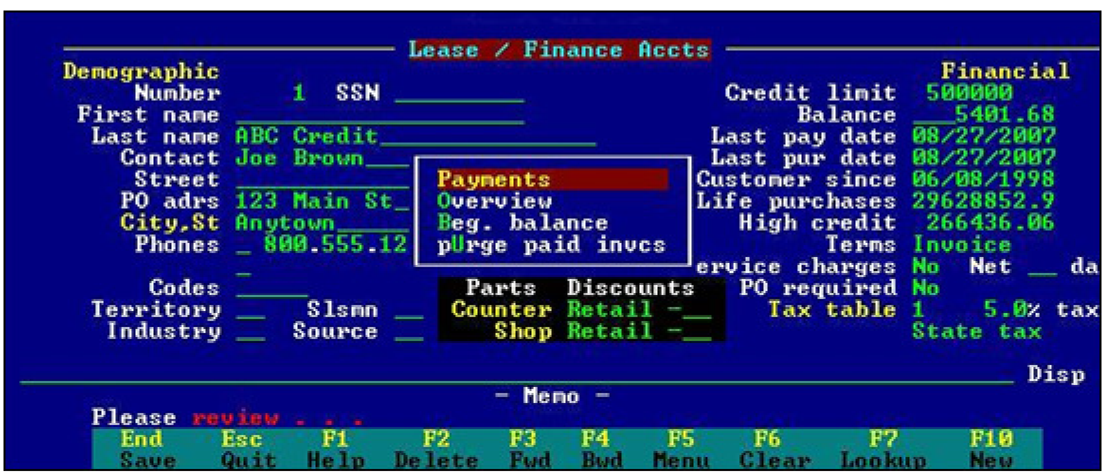
Use your arrow keys to move the down payment amount into the appropriate field. Once you have verified the payment breakdown is correct, process the invoice.

Receiving Payment on Lease/Finance:

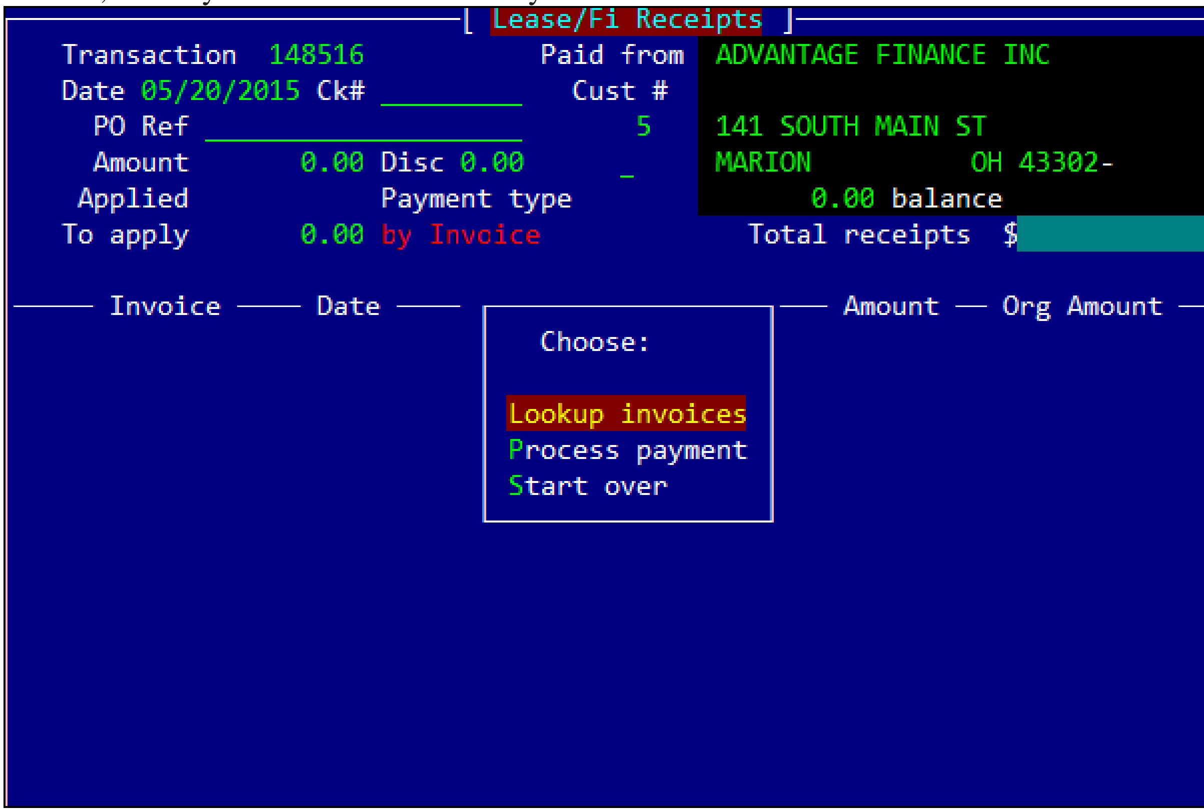
a) Open the Lease/Finance account by entering the account number or by name lookup.

b) Select F5 for menu, and choose "Payments", the payment screen will appear. System will default to current date.

c)



Enter payment information: check #, PO ref, payment and discount amount. The system will default to the account balance as the payment amount, which you can override manually.



Credit Card

Note - Customer is paying off lease with another finance note - very seldom used.

A/P Clearing - this option is used when Mfr. Gives the dealer credit instead of actual funds. When an external A/P module posts to G/L, this account is cleared in this manner.

d) Enter through to pop-up menu, choose "Lookup Invoices" - this will display a list of all invoices processed under this Lease/Finance account.

e) Use the arrow keys to select the invoice or invoices you wish to pay. If you have more than one invoice to pay, you must repeat this process until you have all invoices listed on the payment screen totaling your check or credit amount. Again enter through to pop-up menu, and select

"Process Payment", or press F10.

f) Select payment type:

Cash

Check

g) Once payment type is selected, the system will ask if you are ready to post the payment. Answer "Y" when everything is correct.

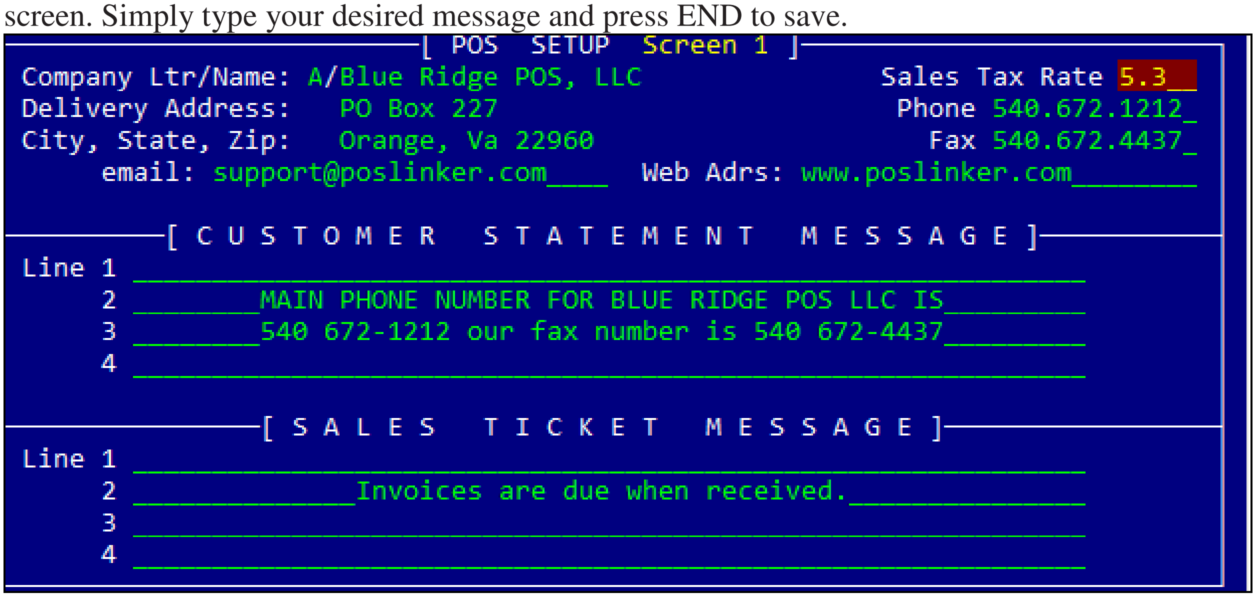
Purging/Removing Paid Invoices from a Lease/Finance Account:

From the Lease/Finance account screen, enter the account number. Press 

, and select "Purge paid invoices". This selection will clear all paid invoices from the account and will no longer appear on the invoice payment screen or the overview screen.

POS Setup - Stmt/Inv Message

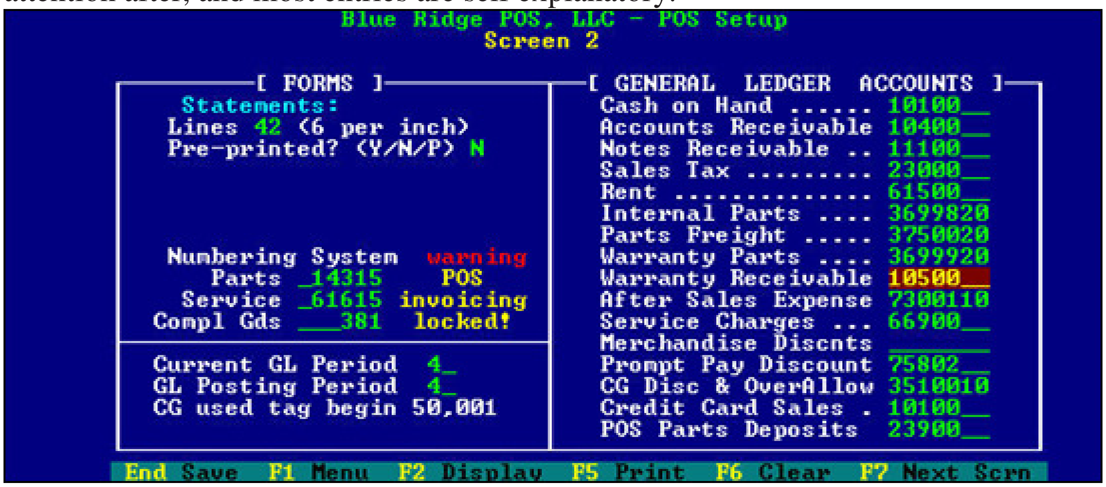
The "Statement/Invoice Message" screen allows the message on the invoice and statements to be changed. You cannot change the company name and address on this screen. Simply type your desired message and press END to save.



Note: The messages are very useful for communicating upcoming sales or new equipment arrivals. It is also useful to print regular statements with one message, and then change the message for printing those statements that have overdue balances.

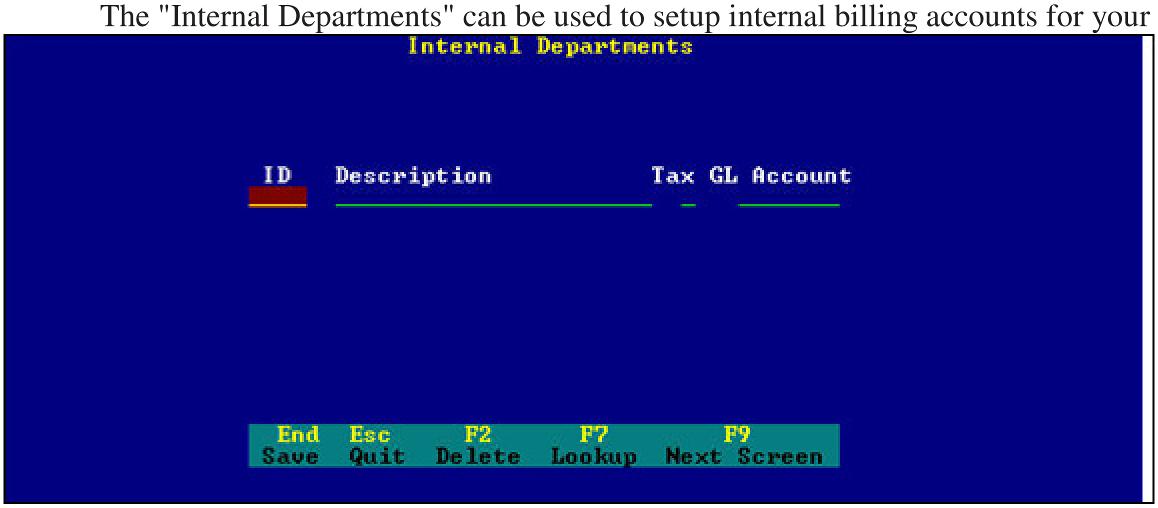
POS Setup - Forms/GL Linkage

The "Forms" section allows you (if needed), to change the size of your statements and/or invoices. For instance, if your company decides to begin using plain paper statements, the number of print lines would change to 66. You calculate 6 lines per inch of paper. You would also use this screen to change your pre-print options for these forms. If you are linked to the "General Ledger", you will use this screen to provide the correct accounts for posting. Most of this information is filled in when setup and leads little attention after, and most entries are self explanatory.



POS Setup - Internal Departments

The "Internal Departments" can be used to setup internal billing accounts for your



shop or parts departments. Press  to setup a new department, and END to save.

Internal Departments

ID	Description	Tax	GL Act
ST&E	SHOP TOOLS, EQUIPMENT	Y	66000
TRSH	TRASH PICK UP	N	69400
UAES	USED AG EQUIP SETUP	N	1250010

Enter Select Esc New PgUp/PgDn New Pg

Non-Stock Items

Non-Stock items could be used to set up automatic control numbers for miscellaneous items such as "Assembly", "Shipping & Handling", "Filing Fees" or "Gift Certificates". These items, or any of your choosing, can be entered automatically on invoices or complete goods inventory costs by entering the ID into the CTRL field.

Examples:

Non-Stock Items

ID	Description	Tax	GL Act
ADV	Advertising Expense	Y	64000
AP	ACCOUNTS PAYABLE	N	24000
APCC	CASH CLEARING	N	10301
AR	ACCTS REC (SPECIAL)	N	11100
ARC	ACCTS REC EMPLOYEE	N	11300
ASAG	AFTER SALE EXP - AG	Y	64200
BD	BAD DEBT	N	68700
BDI	BUY DOWN INTERES	Y	4299510
BR&M	BLDG. REPAIRS & MAINT	Y	67000
CC	CREDIT CARD PAYMENT	N	10000
CGAR	COMPL GOODS RECEIVABLE	N	11200
CIT	CONTRACT IN TRANSIT	N	10700
CLRG	CLEARING ACCT - CASH	N	10301
COMM	COMMISSION	N	6030010
COVE	COMPANY VEHICLES	Y	67500
CR	CASH REBATES	N	4299910
D&S	DELIVERY & SETUP	N	65900
DC	WHOLEGOODS DISCOUNT	Y	4299910
DD	DIRECT DEPOSIT IN BANK	N	10000

Enter Select Esc New PgUp/PgDn New Pg

Quic Parts Lookup Module Instructions
Pick List Maintenance

This module allows you to create a custom parts look-up library that suits the needs of your business. It will allow you to enter a make, model and description of as many units as you want and then build a listing of parts used on each of those models in the database.

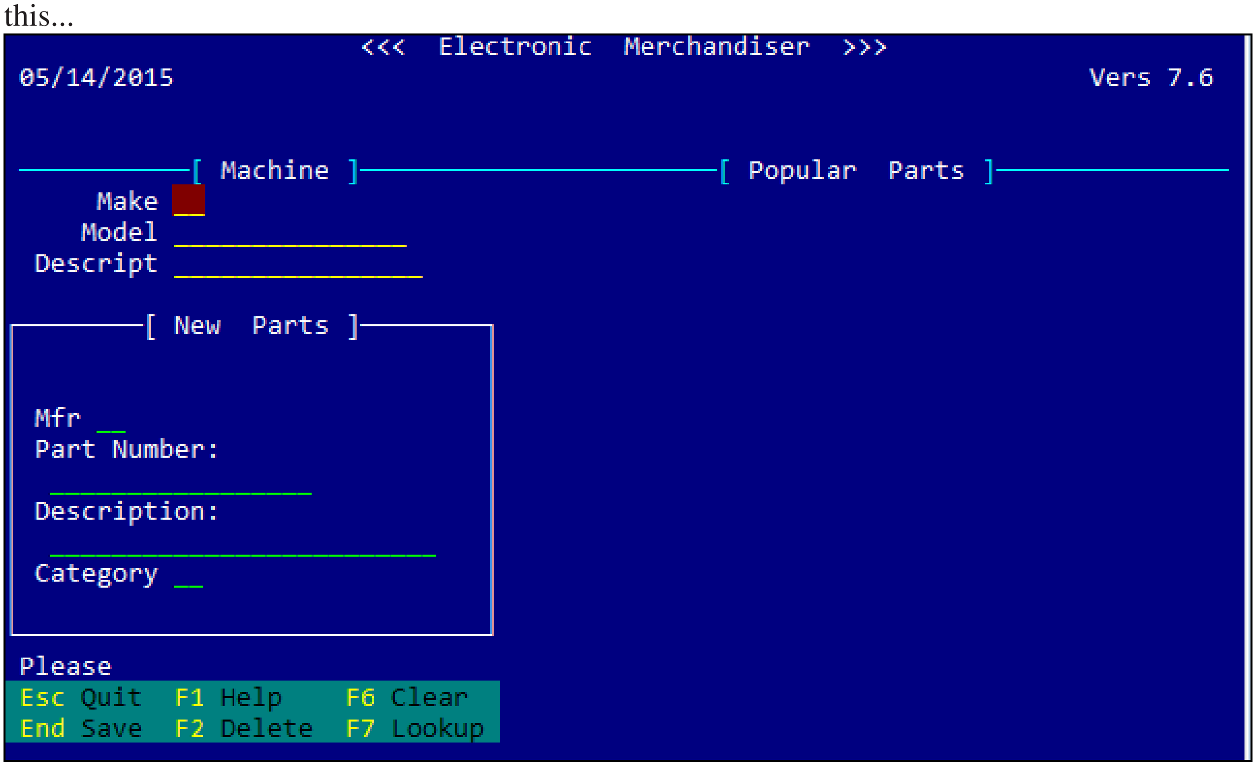
When you are selling parts to a customer, you can then refer to the database and select the customer's make and model from the list. You can create a pick/shopping list by tagging the parts you want with a quantity and then with a single key stroke ( ) you can import the list right into an invoice.

This will prove to be just as helpful to the experienced parts person as it will be to the inexperienced ones. This is especially true and will be of great value to your business, if an experienced parts person puts their years of knowledge and training into this database. It eliminates wasteful lookup time during those critical rush periods and frees up the more seasoned personnel from the constant inquisition by inexperienced personnel, so that everyone can be more productive. It will also be faster and easier to train new employees to use the parts that you keep in inventory, because you can control the information that is fed into this database.

In order to use this module, the user must first build the database.

- Select the **P**oint of Sale area,
- then **POS** Setup from the menu,
- and then **P**ick List Maint.

The Screen should now say **<<< Electronic Merchandiser >>>** at the top and look like this...



You may now enter the make, model and description information for any unit you want to list in the database. Then enter a Manufacturer and Part # for any part that you want listed as being used on this particular model. Now press the END key to save this record.

The part number will now appear on the right half of the screen under the heading of Popular Parts. You are now ready to enter the rest of the part numbers in order to finish the listing for this make and model.

Note: You may use any combination of manufacturers that you want when building a parts list for a particular make and model in the database.

When you are ready to use the database, you will find this information two keystrokes (F1, Q) away from any parts or service invoice.

While in an invoicing screen (for parts or service) the information you entered can be accessed by pressing F1(Help) and then selecting **Q**uic parts lookup from the menu. You will then be prompted for a make and model. If you aren't sure about what to enter here, you can press the F7 key to see the list of makes and models on file in the database.

If there are too many units in the database to fit on one screen, you can use the PG↑ and PG↓ keys to see the next or previous page(s). You will make your selection from the list by highlighting it with the arrow keys and then by pressing ENTER. You now will see the model listing with the corresponding part numbers along with a blank space beside each of the part numbers. This blank is used for entering the quantity of the particular numbers you wish to sell. Once you have selected the desired quantities for the appropriate part numbers, press F10 to process and import the numbers into your invoice.

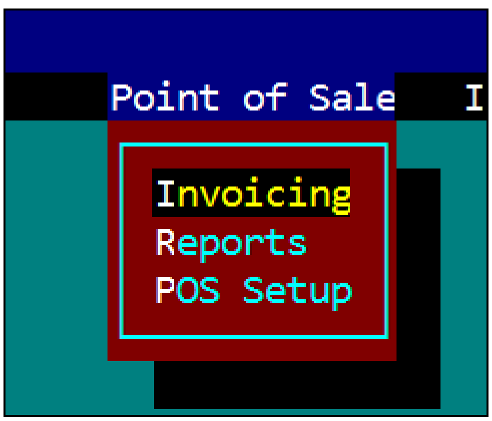
In those situations where the customer needs parts for more than one unit, you may repeat this process for a different make and model, while in the middle of an invoice, without losing the data that you have already entered. When you process the next list you will see that the previous data is still in place with the addition of the new data that you have selected.

4. Invoicing

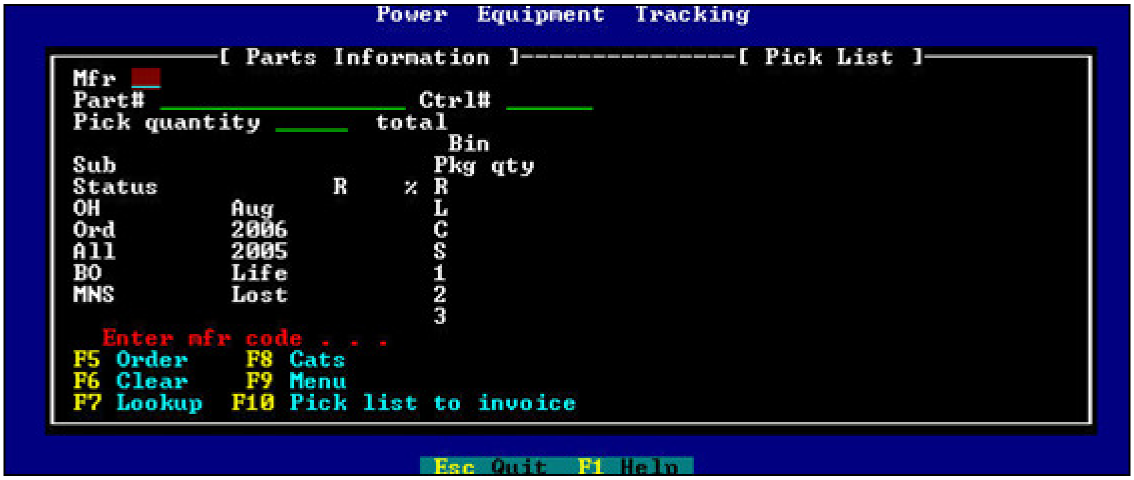
If Invoicing is selected from Point of Sale, the Employee ID Screen appears. Several choices can be made at this point. The first selections from the Invoicing main menu we will discuss are the two lookup screens.

These screens can be used even if you do not have all your inventory entered into your system. Simply hit F7 for "Parts Info", or F9 for Complete Goods information. This will allow you to search by Mfr. code, part number, or tag number for the cost and list prices of either a part or whole good.

The F7 Lookup key is area sensitive and depending on where your cursor is located it should bring up a listing of Mfr. codes, parts, etc. If your inventory has been entered, this screen will also give you the bin location. These screens are available to do a quick lookup to check parts and whole goods availability, prices, and also to record lost sales. These screens should be one of the most frequently used. This is where the counter screens will normally rest. There is no need to enter employee initials to do a lookup or access the help screen.



F7 Parts Info- Press F7 for immediate parts information without starting an invoice.



F9 Cmpl Gds Info Press F9 for immediate complete goods information.

Invoice Selections:

Enter the invoicing menu. This part of the program is password protected and can only be accessed with the proper authorized two letter employee ID, which is set up under the Point of Sale menu selection, through choosing POS Setup.

Once initials have been entered, the choices you have are:

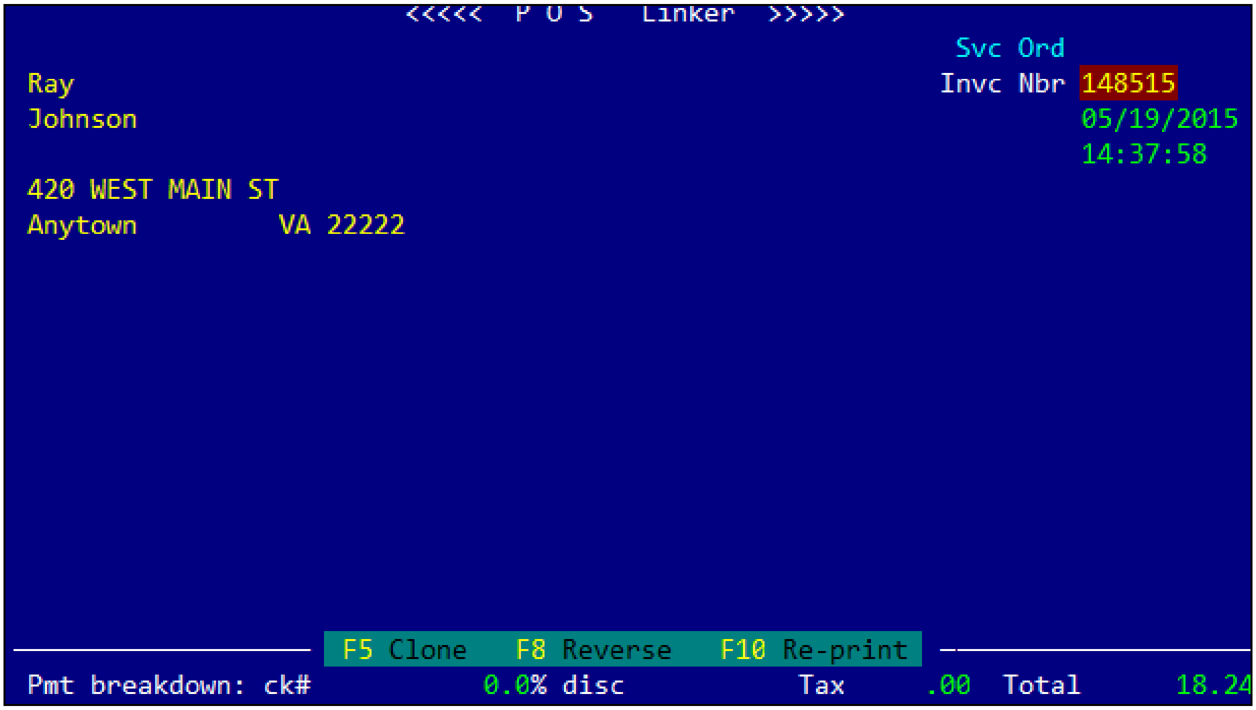
- **Cash invoice** - Quick taxable invoice assuming “Cash Sale” instead of a customer name.
- **Service Order -** This selection will open a service order screen allowing data entry for repair and labor information.
- **Lookup/install customer** - Lookup customer by account number, phone number or name.

If no customer is selected under phone or name a new customer may be added. After a customer is selected a choice is made from *Invoicing*, *Service Order*, or *Customer Review*. This method is recommended over *Cash invoice* because it creates a permanent record in the customer's file. If the customer wishes to purchase the same item or return it without the original ticket.

- **Temporary customer** - None of the information entered on this screen is saved to the customer database. This method is rarely used since the same effort will permanently capture the customer information. Type as much or little as needed and press F10 to begin invoice. If last name, city, and state are provided the tax rate may be altered. Pricing is selectable from six levels at plus or minus 0 to 99%.
- **Internal sale** - Allows a choice from “*After Sales*”, “*Warranty*”, or “*Other*”. “*Other*” will list any internal accounts available for internal sales.
- **Elec Cash Drawer** - Allows salesperson to open cash drawer without completing a sales ticket. Can be password protected.

- **Re-print, reverse, or clone** - **.This option only applies to Parts invoices**
  Allows you to pull a parts invoice that has been created, and either re-print it, copy or clone it for another customer. You may also email an invoice from here

You may also reverse the charges to a customer's account. F7 at INV # field will give you a list of all invoices processed beginning three days since the last POS daily closing report was run. If the invoice number is known, simply type it in and press ENTER. Then press escape for Options.

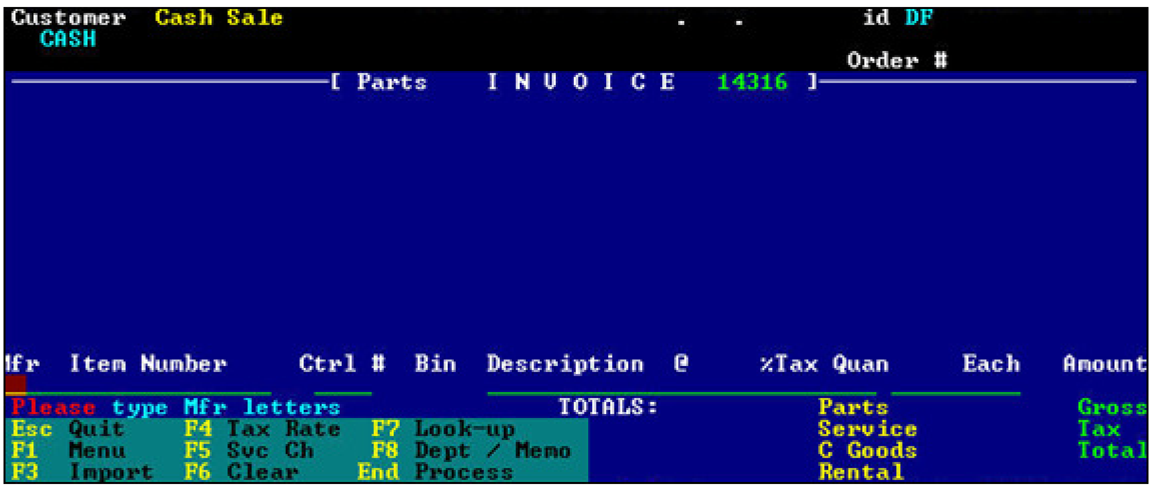


Creating a Cash/Parts Invoice:

Pressing* F1 *for help provides the four part sales help screens which provide useful information for data entry onto the invoice.

Entering invoice information:

1. Enter MFR - Two characters are required to indicate which parts division is to be accessed. The user may skip Mfr to enter a UPC bar code number or control number if known. Use the keys ** to enter comments. The letters Z Z can be used to indicate miscellaneous parts that can be described and priced independently of any loaded parts catalog.



Enter Part Number - An optional numbering pattern may appear here after a valid MFR code is entered. If part number is unknown, pressing F7 will display a list of inventory parts with descriptions. Selection of Cash Invoice on the Invoicing Selection Menu brings up a "Parts Invoice" screen.

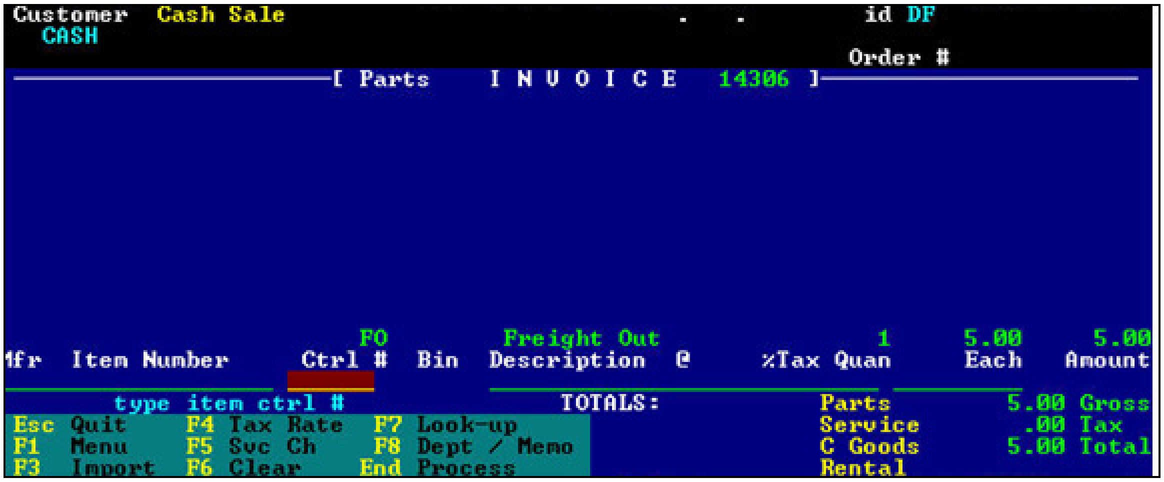
Type the part number and press ENTER.

If the part number is in inventory, availability displays below number as well as the description and price. If no Mfr code is entered, it is assumed the number is a UPC code.

2. Enter CTRL # - The optional control number can be used to bypass the above steps and directly access inventory items.

This is a short cut method to easily identify fast moving items without entering MFR codes and lengthy part numbers. Special non-stock sales and account transactions are also entered here. Patterns are used to guide users as to the way a particular manufacturer usually numbers parts.

Key:	
#	Digit
!	Alpha/punctuation as it appears



<u>Reserved codes include</u>:

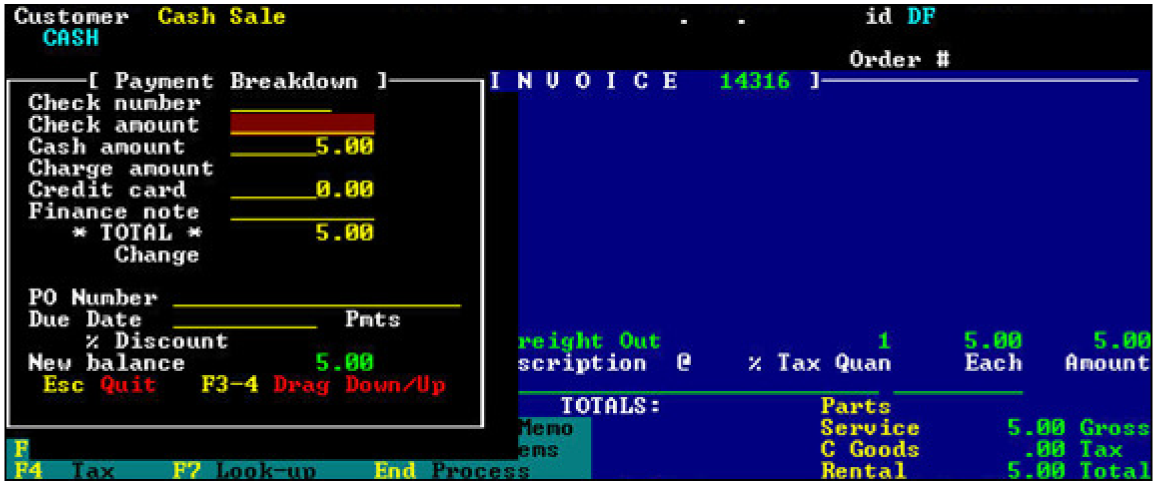
- ***FI*** - parts Freight Inbound (taxed)
- ***DISC*** - DISCount allowed
- ***FO*** - parts Freight Outbound (no tax)
- ***RENT*** - RENTal income
- ***DEPP*** - DEPosit parts

3. Entering QUAN - This field begins with (1) for item quantity one item sale is most common. When that is the case, just press ENTER to continue. Otherwise enter the correct quantity and press ENTER.

NOTE: Use a negative quantity to return items.

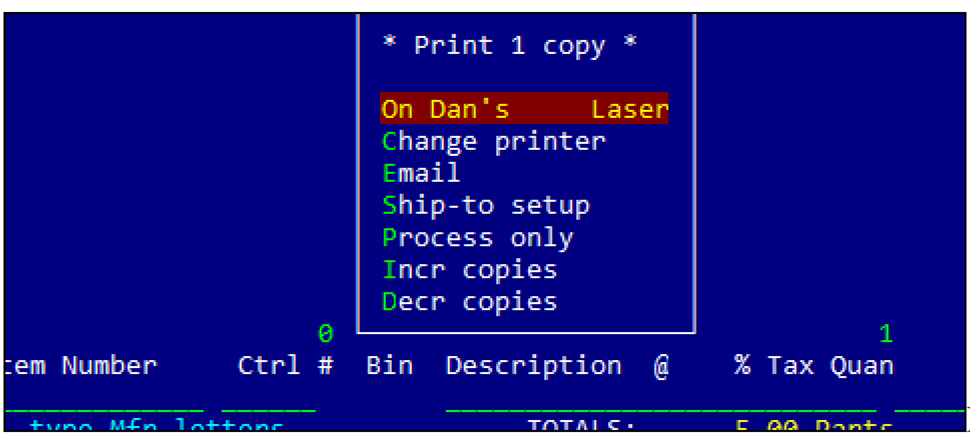
4. Entering EACH - Price each will display when pricing is available for the item. Otherwise, the price must be entered following general help guidelines. Once all items have been added to the invoice screen, press END or F10 to process - While the invoice is still displayed. "Payment Breakdown" window appears. Payment amount can be split among the different categories, depending on the initiation of the invoice, or moved with F3 and

F4.



"Invoice Print-out" menu appears after pressing END or F10, your choices are:

- **On <printer name>** - print out the invoice on the named printer.
- **Change printer** - this is a switch to select a different printer.
- **Email** – Sends Email invoice to Customer
- **Ship-to setup** - displays the "Ship-to Setup" window. F7 displays a list when the cursor is in "Shipped VIA" of potential shipping When the "Ship-to" window is displayed. (F10 third time):
  - END or F10 will process the transaction When the "Payment Breakdown" window is displayed and the payment amounts have been entered in the appropriate fields.



PART

INVOICE SPECIAL FUNCTION KEYS:

F1 HELP MENU

- **Help screen** - displays a series of help screens
- **Save invoice** - stores the current invoice for future recall.

- **Restore invoice** - displays stored invoice selection list
- **Print quote** - print current invoice as a quotation - must be re-saved if you wish to retain.
- **Customer Review** - displays customer review screen (Acct. maintenance, payments, etc)
- **List complete goods** - displays complete goods customer has purchased.
- **Quic parts lookup** - enables the Pick List maintenance screen sources.
- **Process only** - process the invoice without printing.

F3 Import - Imports pick list from another program such as Partsmart.

F4 Tax Edit - Cancel or change tax rate. Make changes while cursor is at "Quan."

F5 Svc Chg - Toggle a Y or N flag on current invoice as to whether a service charge will apply should invoice become past due.

F6 Clear - Clears the item entry area. If the item displayed was selected from the current invoice, it is erased from the invoice.

F7 Lookup - The ability to lookup is a very powerful function of POS LINKER Software. It allows counter personnel with very little experience to give customers better service. The smart lookup is sensitive to where information is needed:

- **at Mfr** - display parts division code selection list.
- **at Item number** - display relative part number list by checking either the store inventory only or the manufacturer's complete price book.

NOTE: Lookup can be done on partial part numbers for most manufacturer's price list to find the particular part needed.

- **at Quan** - change item pricing using one of six levels plus or minus 0 - 99% or manually set the sell price.

F8 Dept/Memo - This function is used most often to alternate between the parts invoice screen and the complete goods invoice.

<u>Change department menu</u>:

- **Service Header** - opens service order screen
- **Complete Goods** - switch to Complete Goods item entry
- **Tran Cpl Goods** - switch to Transfer item entry
- **Rental Items** - switch to Rental item entry
- **Display Memo**: If the part displayed has additional information “F8 memo” will flash.

When F8 is pressed, the memo displays on the last line.

F9 or ↑ **Edit Items** - Allows the cursor to move to the line to edit. A selection window appears and page up PG↑ and page down PG↓ are active. ENTER will select and ESC cancels.

Charge Invoice to Customer Account

To process an invoice through a customer's account, you must choose "Lookup/install customer". Select the appropriate customer account number or use F10 to lookup customer by name or by phone number.

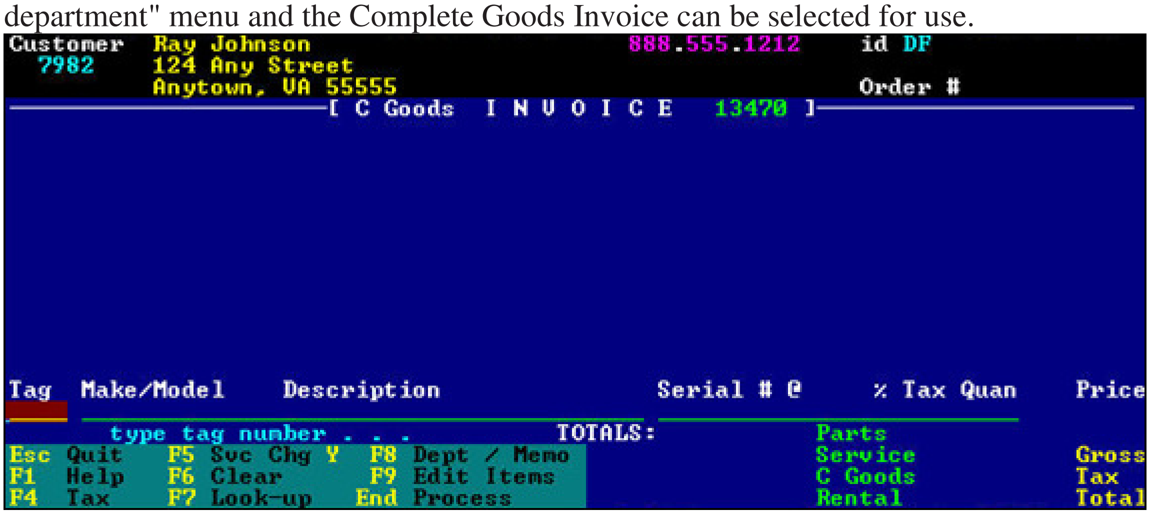
Reversing a Parts Invoice

From the Point of Sale menu, choose Invoicing and enter the operator's initials. Select "Re-print, reverse or clone invoice". Enter the invoice number or press F7 for a list of active invoices, use Page Up/Page Down to locate the desired invoice. Once selected, press ENTER to display the invoice detail. Pressing ESC will display your options. Choose F8 to reverse the selected ticket and display the invoice detail with negative quantities and amounts. Press END to process the reversal. This process will return the part items to inventory and correct the customer account if processed as a charge.

Complete Goods Invoice

Creating a Complete Goods Invoice

Press F8 Dept/Memo from the Parts Invoice screen. This will bring up a "change department" menu and the Complete Goods Invoice can be selected for use.



Pressing F1 Help provides four Complete Goods Sales Help Screens which provide useful information for invoice data entry. Most complete good sales would be processed through a customer's account for tracking purposes. Follow the instructions on pg 4-12 to initialize the invoice through a customer account.

<u>**Invoice process choices are**</u>**:**

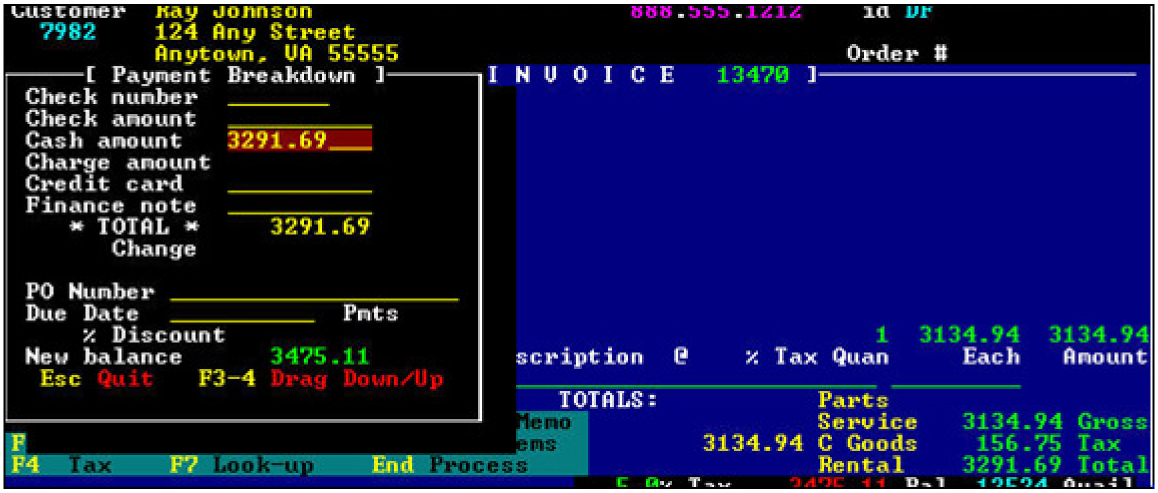
- **a)** Entering TAG - Type tag number and press ENTER. Skip Tag number to lookup sale items by make and model or to bypass the inventory file.
- **b)** Entering MAKE - Two characters are required to indicate the manufacturer division to be referenced. F7 will lookup and display a code selection list of all defined manufacturers in the system. Use ** to enter comments.
- **c)** Entering MODEL - SERIAL # - Non-stock and trade-in items are entered here. (optional) Trade-in items will be copied to the inventory file and nonstick items will not. F7 in this field also displays an inventory selection list.
- **d)** Entering QUAN - This field defaults to one (1) for item quantity since the one item sale is most common. When that is the case, simply press ENTER to continue. Otherwise, type over with the correct quantity and press ENTER. Use a negative quantity (type the minus - sign before the quantity) to return items.

This procedure is only used for complete goods returns, use the "reverse invoice" (pg. 4-10) option for all parts returns.

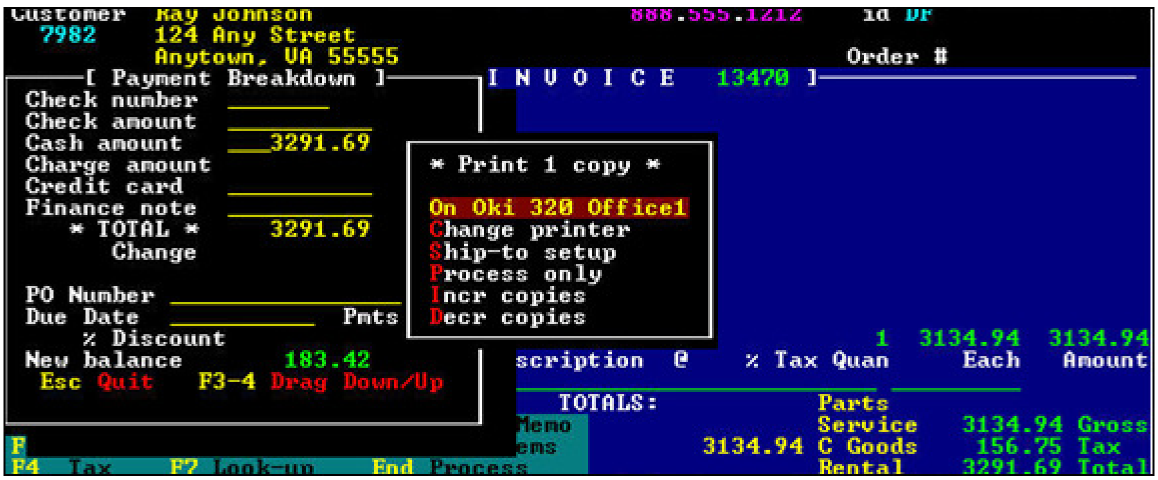
When all information has been entered on the invoice screen, press END to process. While the invoice is displayed the "Payment Breakdown" window appears. Payment amount can be split among the different categories or moved with F3 and F4.

TIP: If a customer charges the unit to their account and places a down payment, choose "Charge" option first. This puts the full amount of the unit in the charge field. Use your arrow keys to move to the appropriate field, (cash, check, or credit card) to enter the down payment amount. The system will automatically change the charge amount accordingly.

END will process the transaction. When using negative quantities and the Tag is blank either “Trade-in” or “Non-stock” must be selected followed by allowance and the sell prices or cost and list prices respectively. See pg. 4-14 for more detail



"Invoice Print-out" menu appears. **Use <printer name>** - print out the invoice on the named printer. This is usually the default printer.



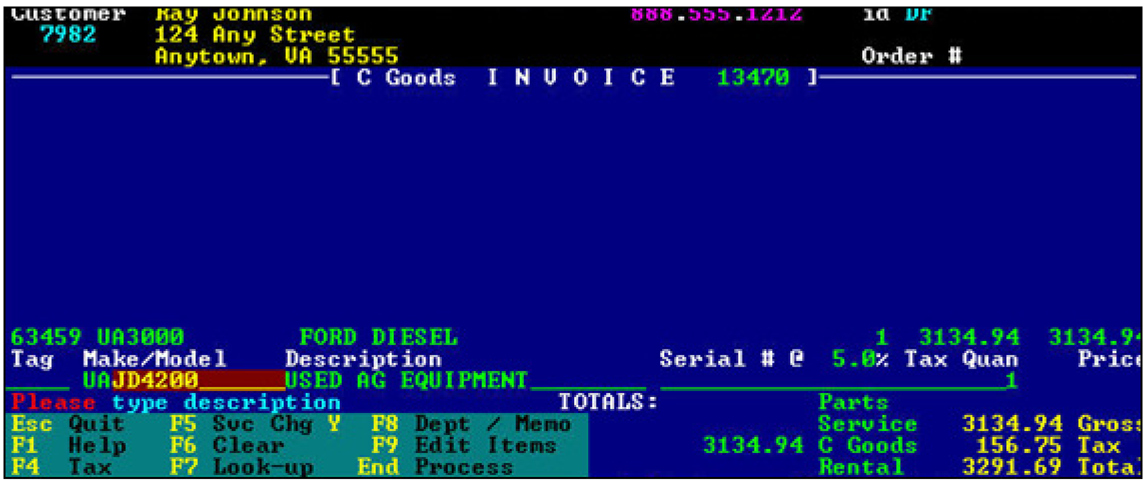
- **Change Printer** - select to route the invoice to a different printer.
- **Ship-to setup** - allows you to print the ship-to and/or directions on the ticket.  displays a list when the cursor is in "Shipped VIA" of potential shipping sources. Press  to return to the print menu.
- **Process only** - process the invoice without printing. This will post the transaction to a customer's account and adjust your inventory.

Trade-In Procedures

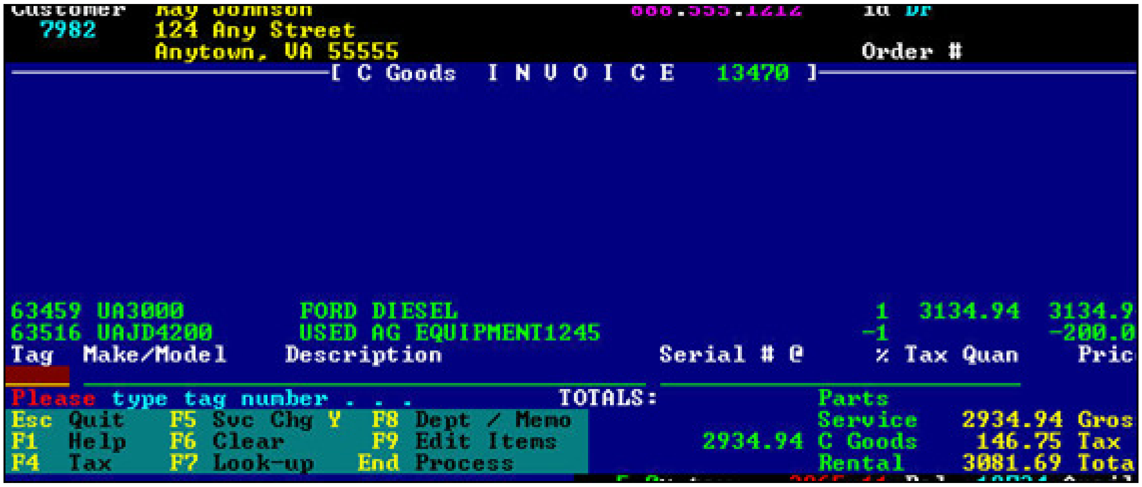
Often a dealer will allow trade-ins on Complete Good sales. To process trade-ins properly, the dealer must determine a number of issues:

1. Do you wish to code your Used Equipment differently than New equipment?
2. Will you be tracking Used or Trade-ins separately for accounting and/or reporting purposes? If you wish to separate your inventory, it is usually a good idea to establish a special Manufacturer Code (Complete Goods, Manufacturer Division) for used or trade-in equipment, such as:
   - UG = Used Goods
   - UE = Used Equipment

This code would be used at Point of Sale, followed by the unit description, serial number, etc.



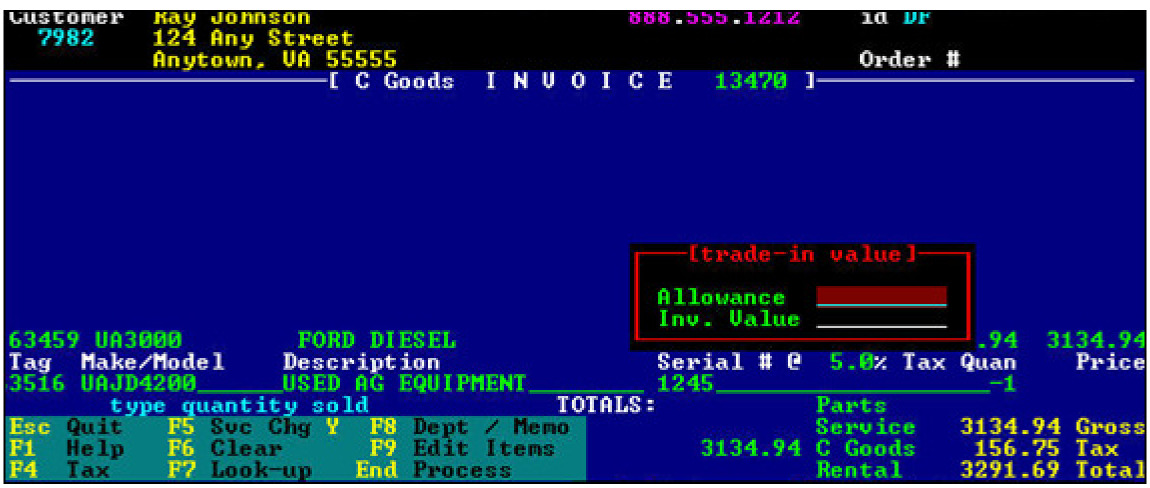
If you wish to list all inventory together by manufacturer, you may simply use the Manufacturer Code (Ex: JD, MU, etc) of the trade-in unit at point of sale. The Manufacturer Code must have previously been established under Manufacturer Divisions. With this method, you will be able to track and determine "used" status by looking at the tag number issued to the unit at point of sale. POS Linker will issue a tag number greater than 50,000 to all used equipment, unless otherwise established by your POS Linker distributor.



In either case, once unit information has been entered, the system will prompt you to select whether the item is "Trade- In" or "Non-Stock" . Once "Trade-In" is selected, the system will prompt you to enter a trade-in allowance and value.

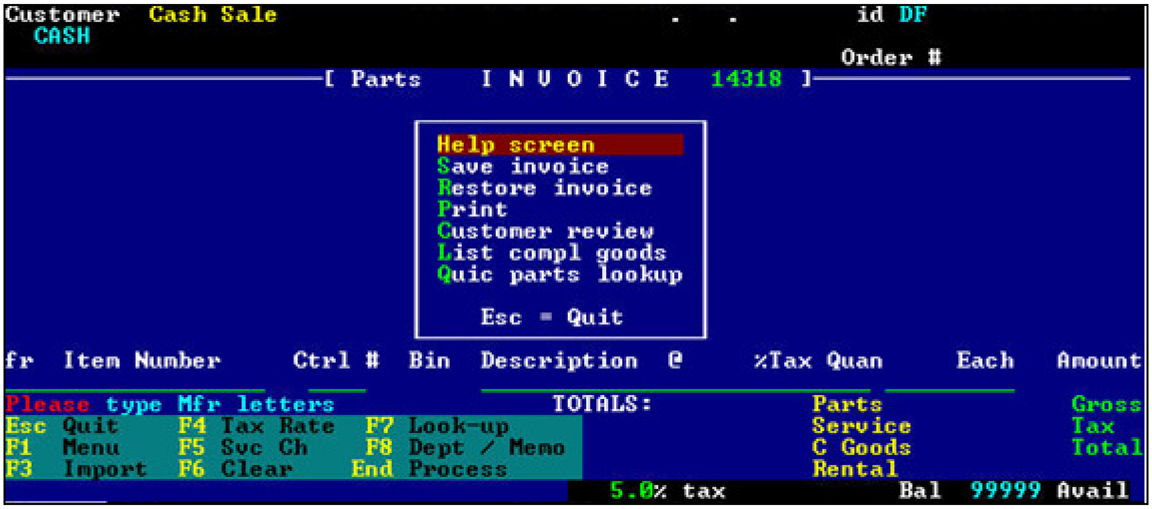
- The **Allowance** is the amount you are allowing the customer for the trade-in unit.
- The **Inv. Value** is basically your opinion of the cash value of inventory for this trade-in unit. This dollar amount will reflect your profit on this sale. The trade-in value will become the cost basis used to determine profit margin when the trade-in is sold.

(Gross amount due + Cash value of trade-in - Cost of new goods = Profit margin on this transaction)



Complete Good Special Function Keys:

F1 Help Screen



F4 Tax Edit - Cancel or change tax rate. Make changes while cursor is at "Quan."

F5 Svc Chg - Toggle a Y or N to flag the current invoice as to whether service charge will apply when the invoice is past due.

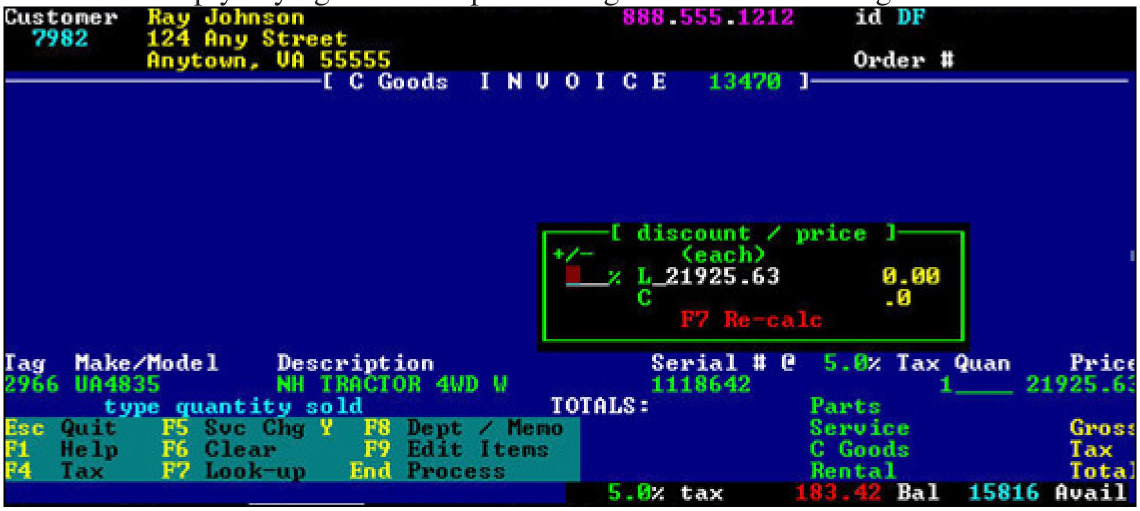
F6 Clear - Clear item entry fields to process a new item. If the item displayed was selected from the current invoice, it is erased from the invoice.

F7 Lookup - The ability to lookup is a very powerful function of POS LINKER Software. It allows counter personnel to give customers better service.

Pressing F7 **at make** will display the manufacturer division code selection list.

Pressing F7 **at model** will display the relative make and model inventory selection list.

Pressing F7 - **at quan** will allow the pricing to be set manually using plus or minus 0 - 99% or simply keying in the sell price. Margins are included for guidelines.



F8 Dept / Memo:

- **Parts Items** - display parts department item entry screen.
- **Service Header** - display service order initial entry screen.
- **Complete Goods** - display complete goods item entry screen.
- **Tran Cpl Goods** - same as above but in dealer transfer mode. (not posted to sales or cost in the GL)

<u>Display Memo</u>:

If the item displayed has additional information then "F8 memo" will flash. When F8 is pressed the memo displays on the last line.

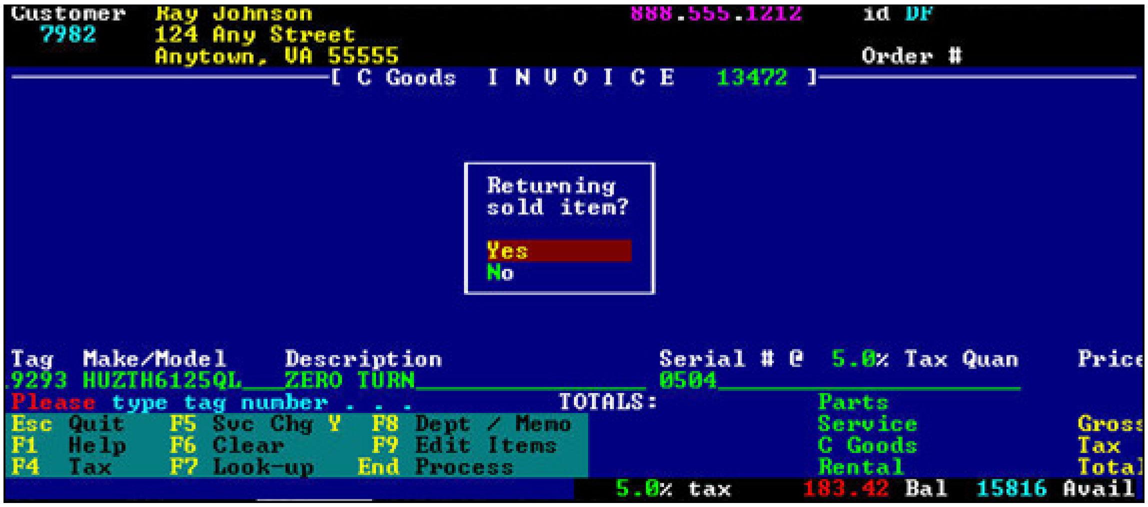
↑ Edit Items - Allows the cursor to move to the line to edit. Press ENTER to select, or ESC to cancel. If more than twelve lines are on the current invoice, a selection window appears and page up PG↑ and page down PG↓ are active.

As above, ENTER will select and ESC cancels.

Reversing a Complete Good Invoice:

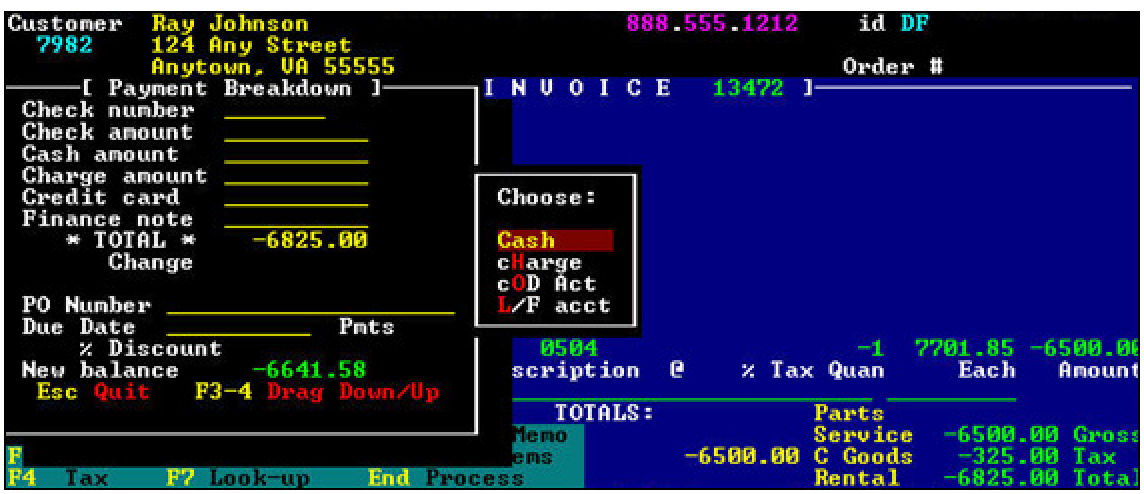
a) Under Point of Sale menu, choose Invoicing. Lookup customer name for invoicing and then select F8 for Complete Good invoice screen.

b) At the Complete Good invoice screen, type the Tag # of the complete good sold. It is generally a good idea to have a copy or the original sale invoice in front of you when returning or reversing a charge to ensure the quantities and prices are the same.



c) The system will prompt you to choose "yes" to return the sold item. Make sure the ticket amount that appears is the same amount as the original sales ticket.

d) END to process. Choose the same payment method as the original ticket. This procedure will put the item back into your inventory, correct the customer's account and adjust your daily records.

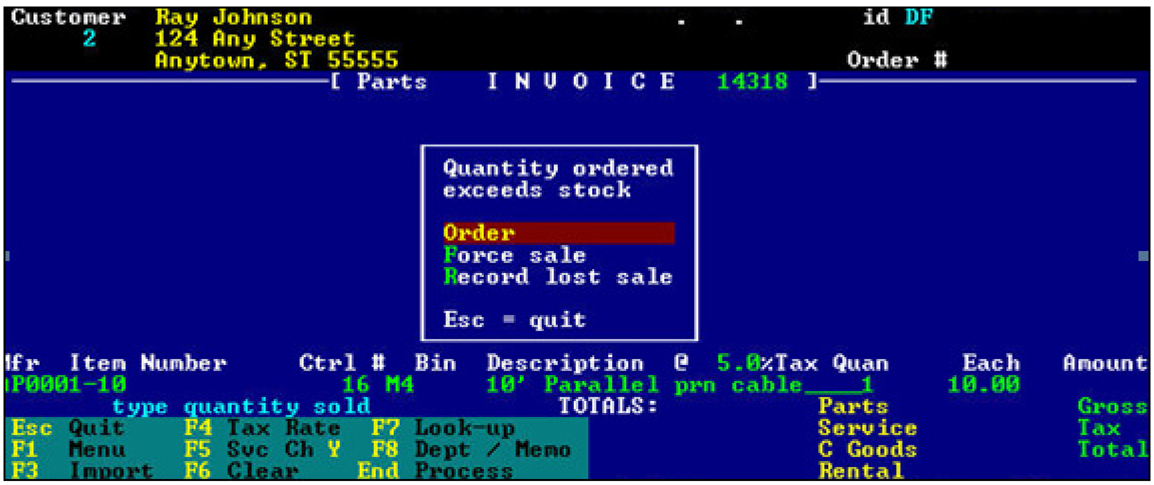


Special Orders - Parts Items

Special orders can be placed for customers on certain items that are not normal stock items or for stock items that have fallen below stock and not yet placed on order. The system will prompt you to specify if the item on the ticket is a "Special Order" once the item number has been entered. The system checks the inventory status and will ask you to verify the desired quantity and the distributor with which you wish to place the order. It is often a good policy to require a deposit in part or full on special order items.

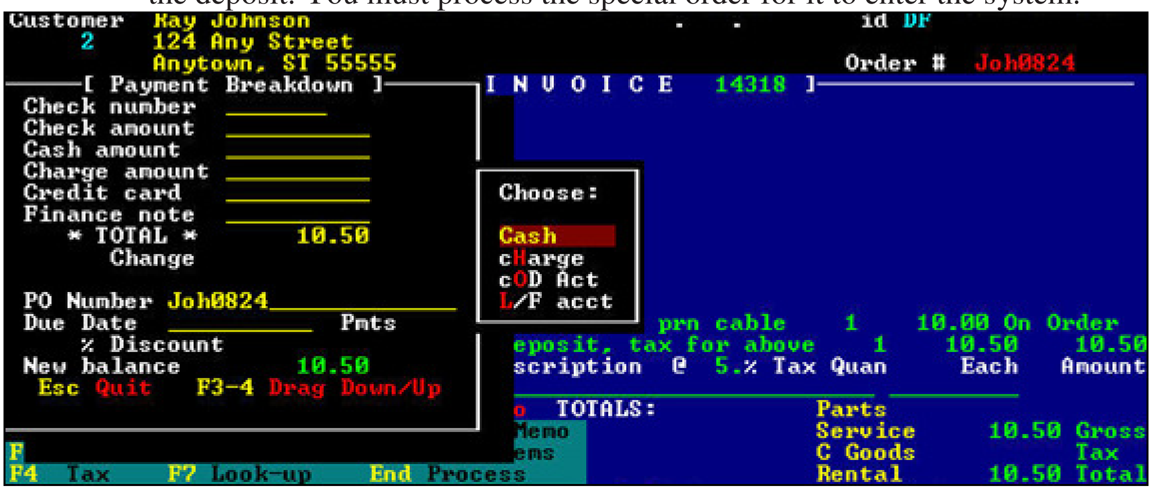
Procedure for special orders:

a) Under Point of Sale menu, choose Invoicing
b) Enter operator's/employee's initials
c) Choose Lookup/install customer - when ordering an item that is not a normal stock item, you must choose a customer account.
d) Enter the part information
e) Pop-up window will appear asking you if this is an "Order", "Force Sale" or "*Lost Sale*" - choose "*Order*"



f) The system will allow you to toggle the pre-pay deposit amount between a full down payment, and none at all. F3 will toggle either "Y" or "N". If "Y" is selected, the deposit amount will default to full price plus tax.

g) Press F10 to process the special order. Choose payment method for the amount of the deposit. You must process the special order for it to enter the system.



h) You may either order the item now or wait until you are ready to place an entire order through Order Processing.

i) Once the order has been received in Order Processing, the system will create a saved invoice for the customer which can be restored when the customer picks up their parts.

Special Order Part Arrives & Customer picks-up:

a) Through Invoicing menu, enter operator/employee initials

b) Choose Lookup/Install customer - enter customer number or F10 to lookup

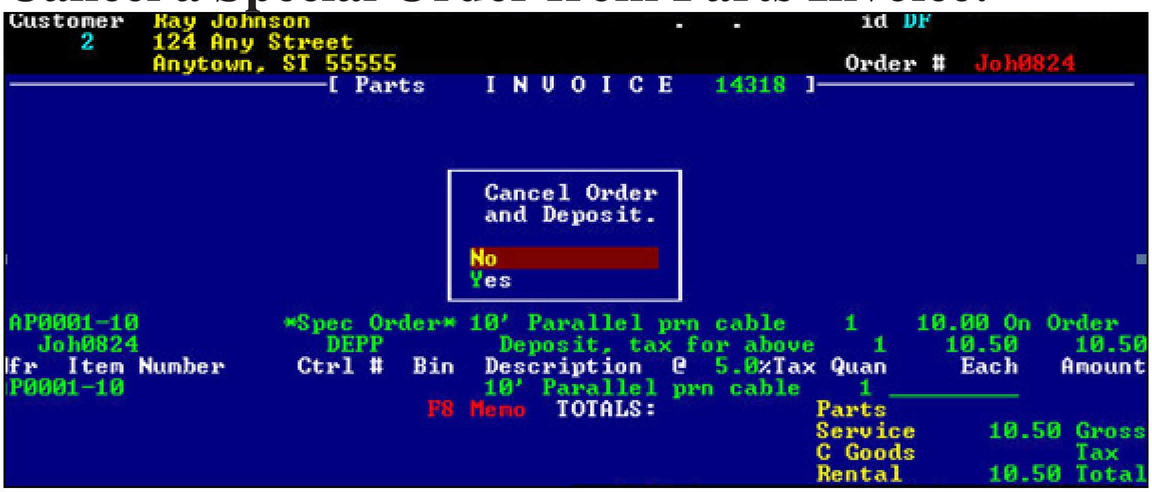
c) Select Invoicing

d) Press F1 - choose Restore Invoice - system will give you a list of saved invoices - choose special order invoice

e) Part order will appear with full price. Deposit amount will be displayed as a negative amount. The difference is balance owed.

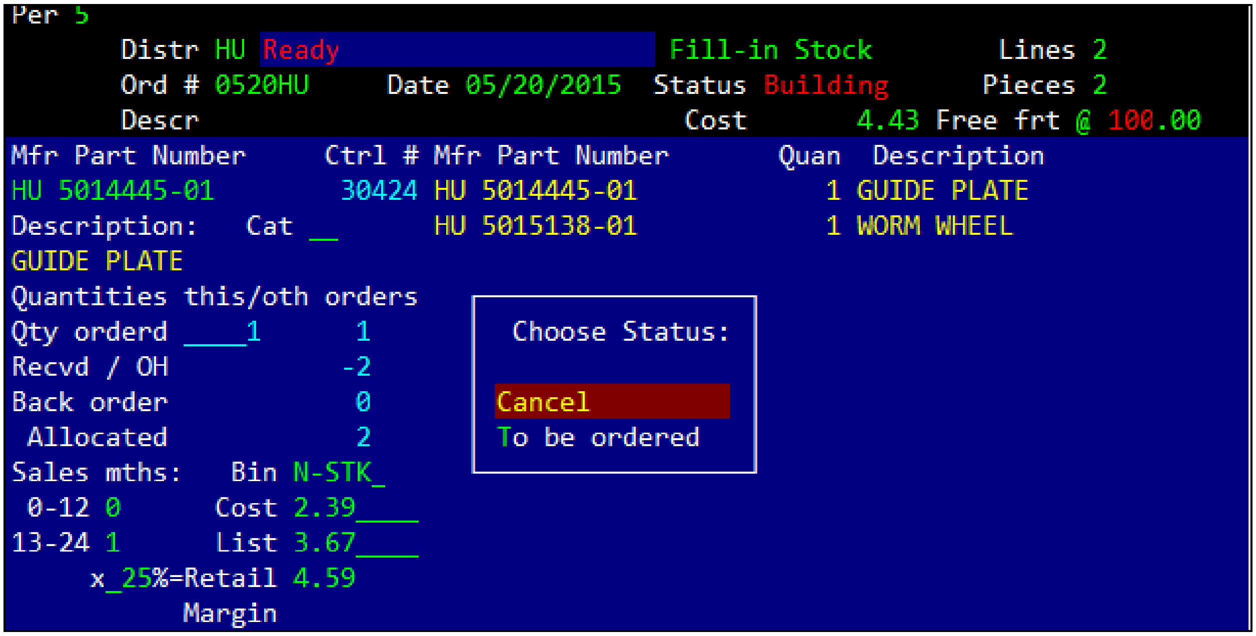
f) F10 to process invoice as normal, indicating cash/charge amounts. You must process the invoice even if it has a zero balance. Do not abandon the invoice because it will put the parts into inventory stock.

Cancel a Special Order from Parts Invoice:



A Special Order may be cancelled directly from a parts invoice only if the invoice has not been processed. By pressing ESC, the system will first prompt you to abandon the invoice and then cancel the special order and the deposit. However, if the invoice has been processed, the special orders can only be cancelled at the Order Processing Screen. From the Parts4Profit menu, choose Order Processing. Enter the distributor code, your order number, date, and order status. The system will prompt you to add the special order part(s). Even if you plan on canceling the order, answer "Yes" at the prompt. The system will add it to your order screen.

You must select it to cancel. Press F7, it will display your order items, select the part you wish to cancel and press F2. The system will ask you to verify the deletion; answer "Yes" and the special order is cancelled. The system will allow you to delete the item entirely, or "unorder" it with the assumption that you would like to order it later or with another distributor.



Cancel a Special Order from a Service Order:

If you have special order parts on a service ticket that has not been processed, simply use your ↑ arrow key to display all parts on the service invoice. Select the special order and the system will ask if you wish to cancel the special order part; answer "Yes". If you have already processed the service ticket, you can only cancel from the Order Processing screen as described above.

Layaway Items

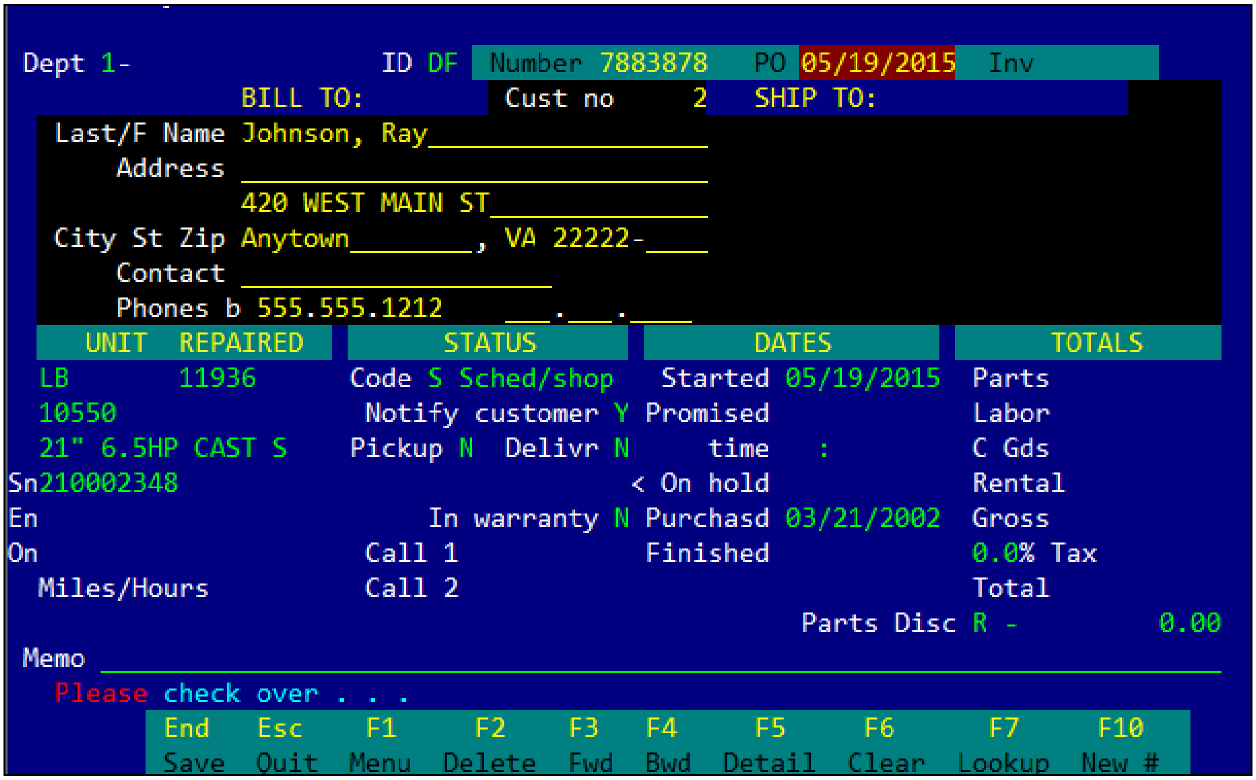
POS Linker allows complete good items to be placed on layaway and payments accrued. It is often a good policy to set up a separate "Layaway" account for the customer to maintain accurate records for your receivables.

a) Under the POS menu, select *Invoicing*, and enter operator initials.
b) Choose *Lookup/install customer* - if customer exists in database already, set up a second account specifically for layaways. Label the second account as layaway somewhere in the name field & give ($0) no credit limit. If customer does not exist, use the install screen to enter customer info & again give $0 credit limit.
(*ex: First Name: Tom Last Name: Jones-Layaway*)Once customer is selected, choose *Invoicing* again, and then F8 for a complete goods invoice.
c) Enter customer's purchase(s) - DO NOT PROCESS
d) Select F1 and *Save Invoice* - this will pull the item from inventory, mark it as a layaway with the customer's account number - it will not give it a sold date. After invoice is saved, you will be back at the operator initial screen.
e) Enter your initials & select "*Lookup/install customer*" again - enter cust. # or use F8 for previous customer.
f) Choose "*Customer: payments/review*" then "*Account Maintenance*".
g) Enter the down payment or payment amount - select F10, enter payment type & select F10 to process - this will be the customer's receipt.
h) To process the remaining payments, follow steps ***f-h*** again.
i) To view invoice again, choose "*Invoicing*" under POS, enter initials, choose "*Lookup/Install Customer*", & select "*Customer review*", "*Closed/Saved Invcs*", "*Saved*". Select appropriate invoice by highlighting & pressing ENTER
j) Once customer has made payments in full – Restore the customers invoice & press END to process. Charge the full amount to the customer's account. Since the customer has made payments, they show as a credit on the layaway account, charging now will "zero-out" the customer's balance.

TIPS: On customer information screen, under Codes - enter an industry code pertaining exclusively to layaway customers, such as LAY & include this code on your statement selections for exclusion.

Service Order

Selection of Service Order on the Invoicing Selection Menu brings up the service order entry screen.



essing F1 Help provides a series of three Service Order Entry Help Screens. These provide useful information for data entry onto the service order, whether it is a new service order or an existing service order. Information is also included concerning the special function keys at the bottom of the data entry screen. Pages 4-26 through 4-28 outline this process.

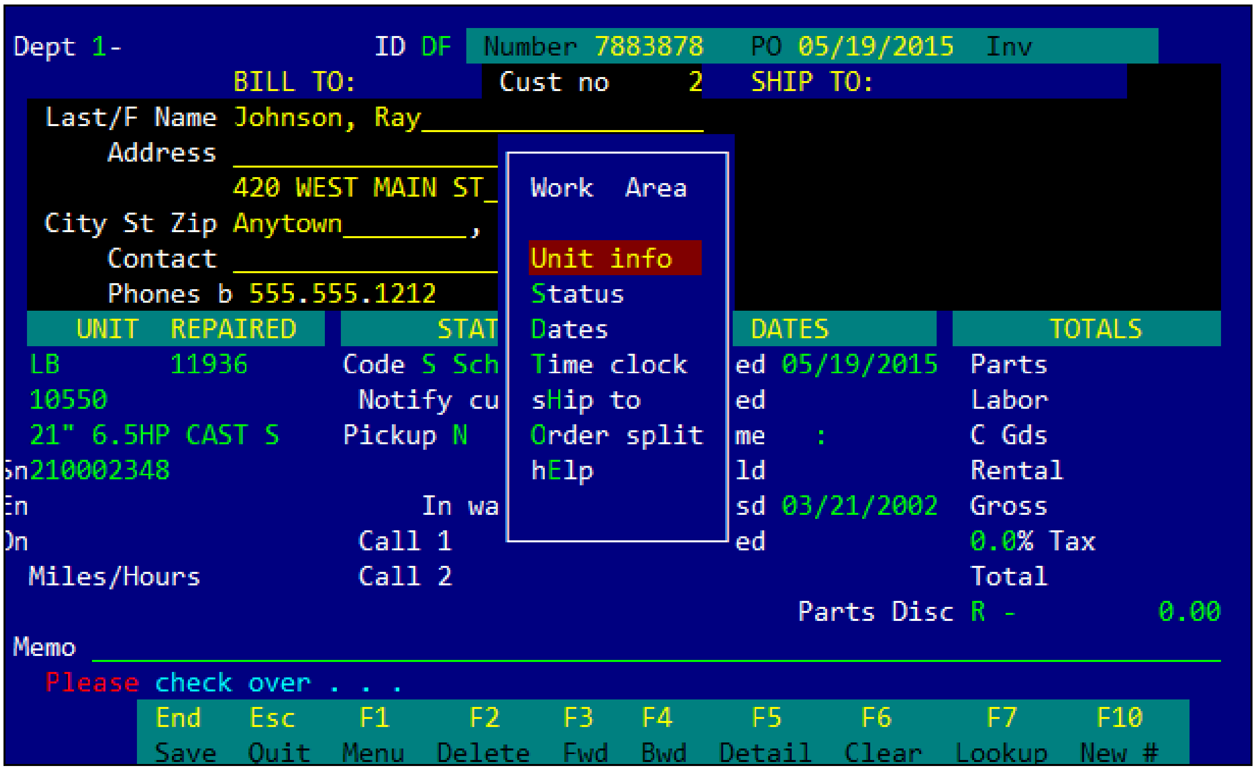
To enter a new Service Order:

a) Press F10. System should indicate new order.

b) Enter P.O. # if needed

c) Enter through to Last/Fname and enter customer information OR press F7 to lookup customer. Select "Change customer", or enter customer account number if known. F10 enables name lookup or F9 for phone lookup

d) Press I (work menu) and select unit information



e) Enter the unit information or press F7 to lookup in the sold goods or service order history files. Enter through all fields to start the next column of data to the right, or press ESC then F9 and select a work area from the menu.

f) ESC will close the above area if necessary. Use F9 again for the Work Menu.

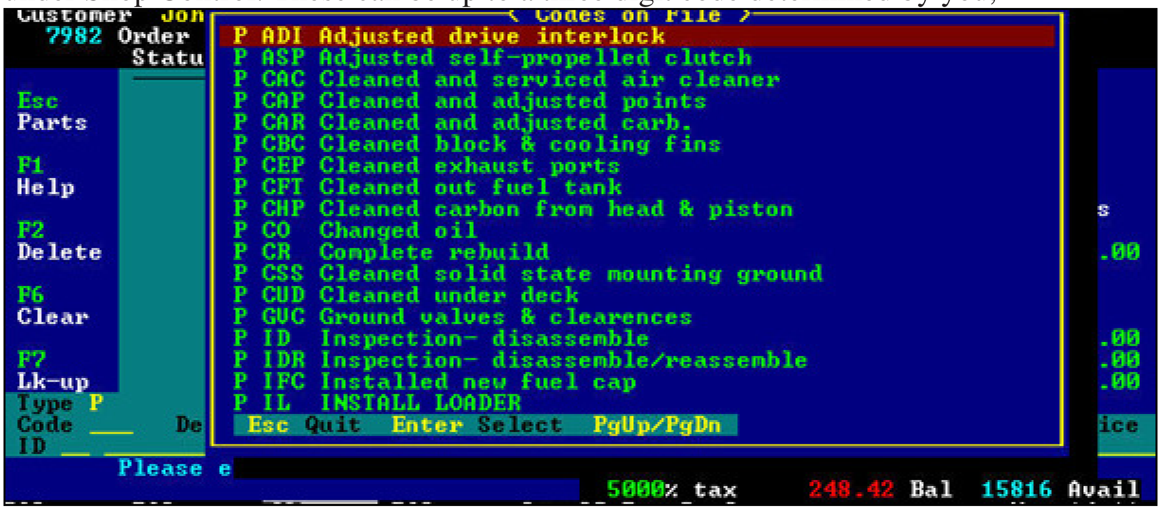
g) To enter Status of the unit press:

- S - Scheduled
- R - Ready
- P - in Progress
- H - on Hold

ESC will automatically enter a status of Scheduled.

h) Once "Work Menu" is selected, cursor is flashing on bottom of screen. Type "h" in code field for help.

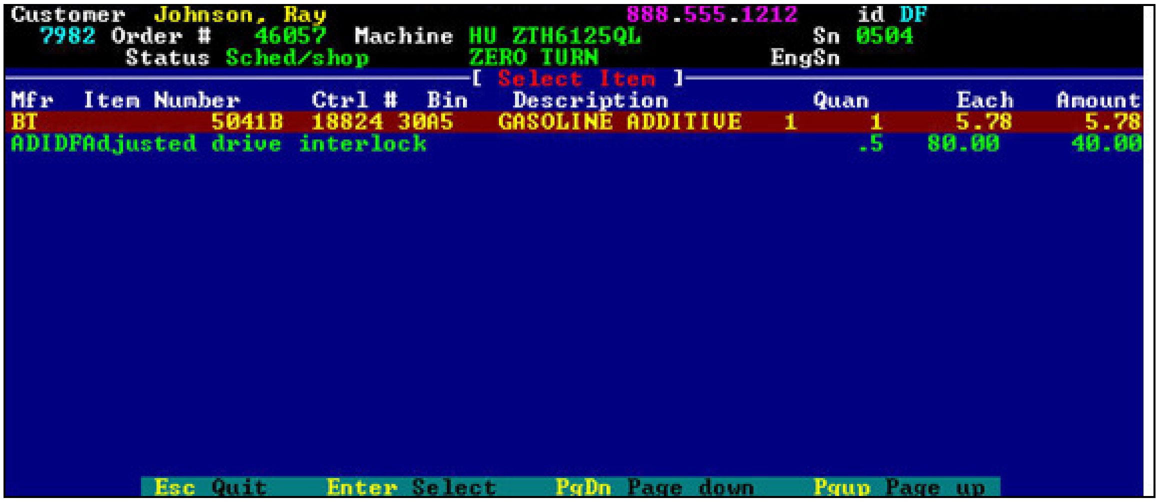
i) Enter service code or press F7 to lookup. Enter employee ID if "performed" service. These codes can be established under the Service Manager menu under Shop Control. These can be up to a three digit code determined by you,



or press F1 for service code help screen.

j) ESC will close the work area or F5 will go to service invoice screen where you may add any parts items on the ticket. The labor charges from the "Work Menu" should appear on top of the service invoice after you press the ↑ key.

Once the ticket is complete, press END for processing options or ESC to save and exit.



For an Existing Service Order:

a) Press F7 to lookup the order if the service order number is not known.

b) Type as few characters as necessary in "Last" to find the customer, or press F9 to lookup by phone number.

c) Press ENTER until "Service Order File" window appears.

d) Highlight the order and press ENTER to select, and press ENTER again to display it.

To close-out service order use F5 *to display parts area. Then use* END *to process.*

"Labor Only" service order:

a) Enter order number or select previous order

b) F7 to lookup customer

c) Select F9 for Work menu

d) Enter "P" for performed work, and then enter a service code. (Service codes are set up in "Service Order Codes" , under the Service Labor menu). You may skip this option.

e) At Emp ID - Type in the employee's initials that performed or will perform the labor. The employee's initials must be previously set up in Employee file under POS Setup menu. No two employees can have the same initials.

f) You may also enter service labor by selecting F5 for the Parts invoice screen and entering employee ID plus "SV" under the Ctrl number.

SPECIAL FUNCTION KEYS

ESC Quit- Close work area or quit to point-of-sale menu.

F1 Help - Displays a series of help screens.

F2 Delete - Erase service order from the system. (Item detail must be erased first.)

F3 Fwd & F4 Bwd - Position in service order file forward or backward in numeric order.

F5 Parts - Display parts item entry screen to add items or close out service order.

F6 Clear - Erase all fields to start over and unlock service order displayed.

F7 Lookup:

- **at Order Nbr** displays name window for service order lookup by name.
- **not at Order Nbr** (*in customer area*) displays customer number window for customer selection/ change. Phone/name lookup is also possible.
- **at date field** displays current date if blank.
- **at Unit Repaired** displays the units the customer owns or previously had repaired for selection.
- **at Work menu** displays the precoded job list selection window.
- **at Ship-to area** allows customer lookup.

F9 Menu (Work Area) (from customer information area):

- **Unit info** - open “Unit Repaired” work area.
- **Status** - open “Repair Unit Status” work area.
- **Dates** - open “Repair Unit Dates” work area.
- **Work menu** - open individual job entry and display area.
- **Ship to** - open customer ship-to name and address area.

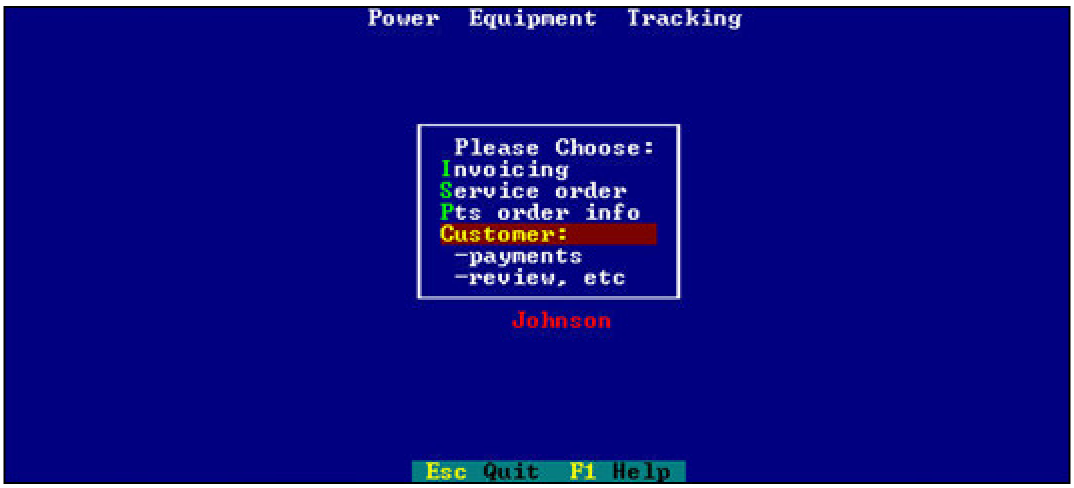
F10 New # - Displays a new service order number. (Highest existing number plus one).

Printing on a Special Service Order Form

Once customer and unit information has been entered on the work order, the user may press SHIFT F5 to print the necessary data onto a special shop form. A work order number appears on a tag which can be placed on the unit for identification.

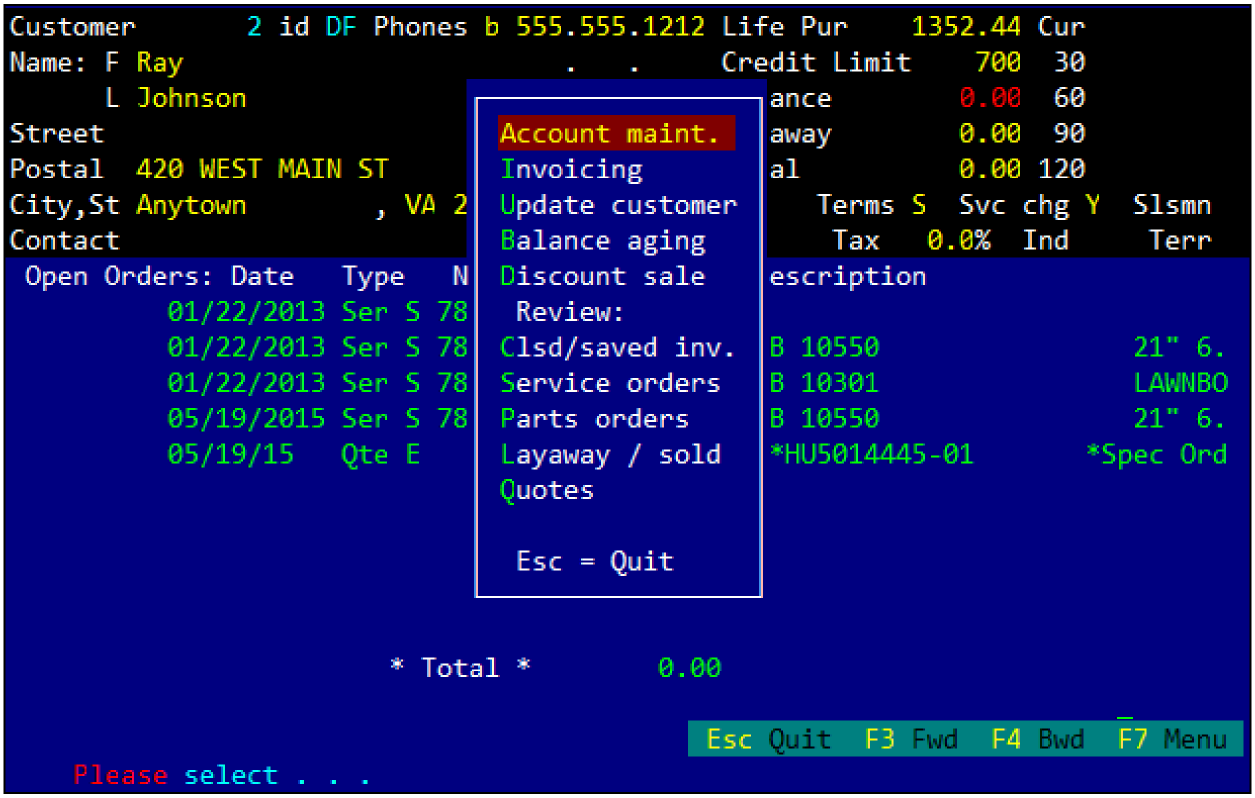
Lookup/Install Customer & Customer Payments/Review

Once a customer account has been selected from the lookup screen, this option will allow you to make payments, refunds (with receipt), age customer balances, discount a sale, and review service orders and closed invoices.



<u>The choices that affect the customer files are</u>:

- **Accou**

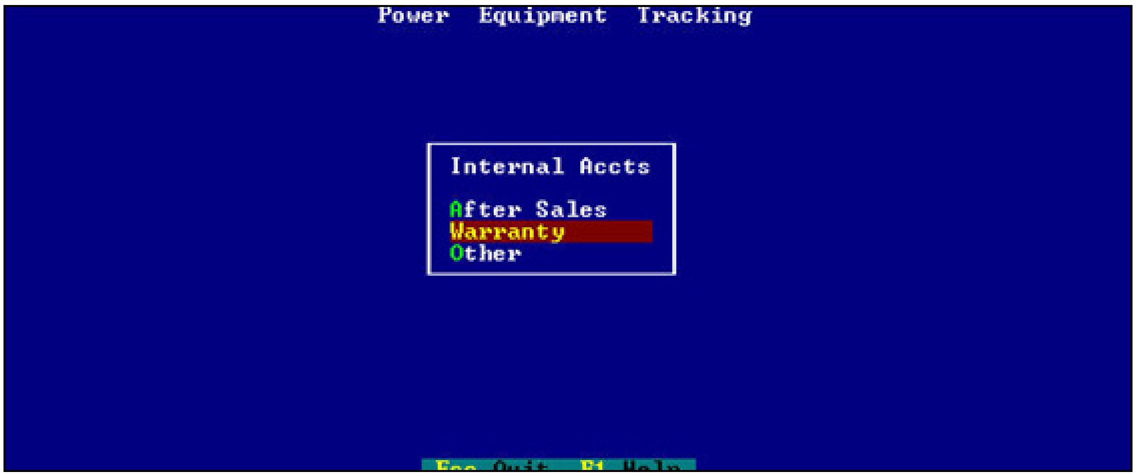


t Maintenance: Allows payments to be made on the account, or refunds given to customer. F10 will process the payment or refund. This payment method will automatically print a receipt for the payment amount.

- **Invoicing**: A short cut for creating sales invoice for the customer chosen.
- **Update Customer**: Allows you to make any address, phone changes, etc. for the customer chosen.
- **Balance Aging**: Displays current and past due account balances for the customer chosen.
- **Review Closed/Saved Invoices**: Displays all closed and saved invoices for the selected customer. By highlighting and selecting any invoice, the invoice detail is displayed.
- **Review Service Orders**: Displays any active or closed service orders.
- **Review Parts Orders**: Displays any part orders on file for this customer.
- **Review Layaway/Sold**: Displays any complete goods on layaway or sold to this customer.
- **Quotes**: Displays any printed quotes given to customer.

Internal Sale

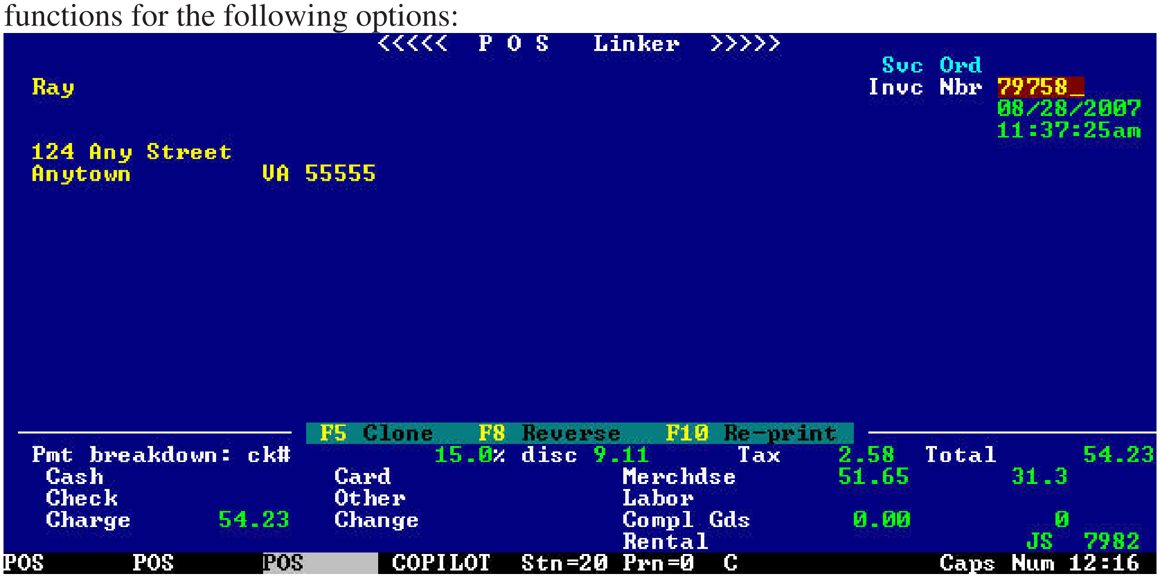
This function allows the user to transact invoices through an internal sales account versus a customer account. Internal shop service, repair, or maintenance could be considered an internal sale. Internal accounts would be set-up under "*POS Setup*". Select "*Internal Sale*" and then the appropriate internal category, (*Other*, *After Sales* or *Warranty*), you wish to charge. Process the invoice as usual. Payment Breakdown automatically defaults to "charge".



Re-print, Reverse or Clone

Select this option to re-print an invoice, reverse charges on a parts invoice, or copy, clone an existing parts invoice for a customer.

Enter the invoice number or press F7 for a listing of invoices dated back three days from the date of the last Daily Report. Select the invoice by highlighting and press ENTER. Invoice detail will display on your screen. Pressing ESC will give you the functions for the following options:



F5 **CLONE** - copy or clone an existing invoice. Process the invoice as usual once it is displayed on the screen, or save it and restore to a different customer.

F8 **REVERSE** - will reverse a cash or parts invoice. Processing the invoice will correct the charges to the cash drawer, customer account, and replace the parts items in your inventory. Process the payment breakdown on the invoice EXACTLY as it was processed originally.

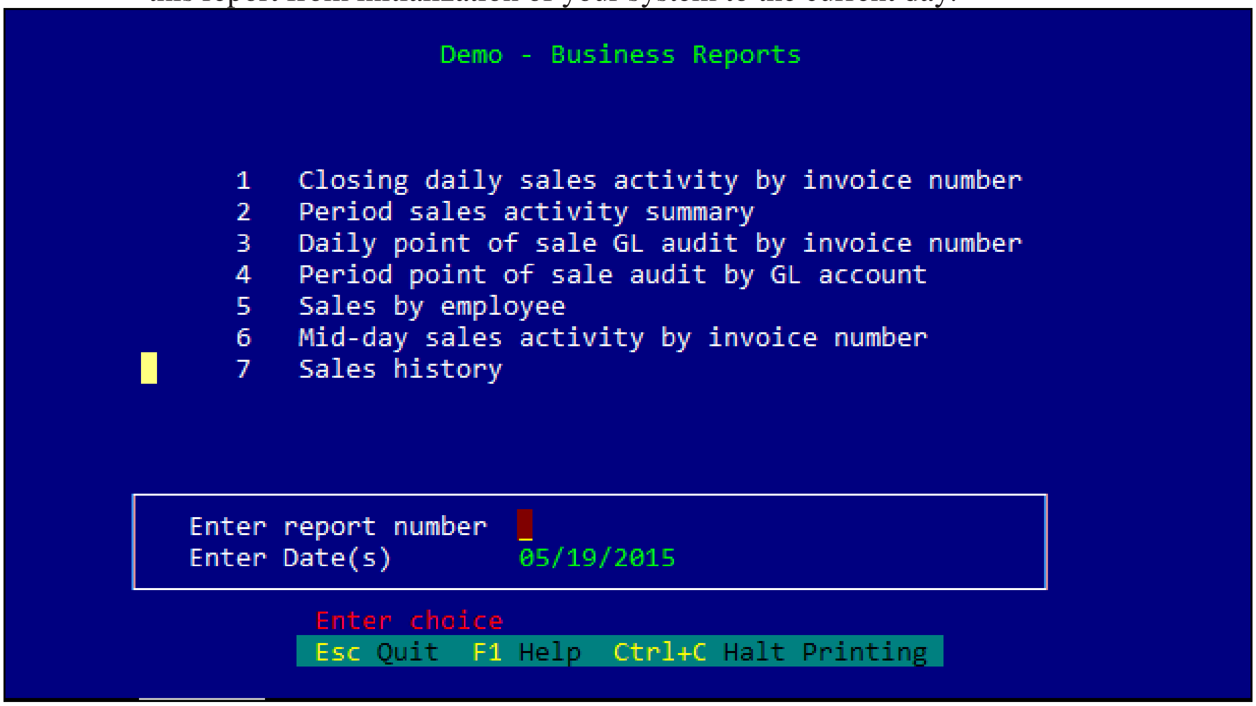
NOTE - Only parts invoices may be reversed with this function. All complete goods invoices and labor charges must be manually reversed.

F10 **RE-PRINT** - will reprint the selected invoice. Or you may choose to email it. If there is no email address you may type one in. When finished press END

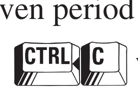
Point of Sale Reports

There are many different reports available at the "Point of Sale" reports menu as shown below. The reports menu allows the printing of various reports summarizing counter invoice activity for the selected day or period.

1. **Closing daily sales activity by invoice number:** gives the invoice amounts for the day by invoice number and the totals for day end closing. You may run this report from initialization of your system to the current day.



2. **Period sales activity summary:** gives daily invoice totals to help prepare any sales tax reports. You may run this report from initialization of your system to the current day.
3. **Daily point of sale GL audit by invoice number, and**
4. **Period point of sale audit by GL account:** only print if the general ledger is linked to the invoice module. Allows you to examine how each invoice was posted to the GL. You may only print the current or previous period for these reports.
5. **Sales by employee:** will show sales by a particular employee for any given set of dates.
6. **Mid-day sales activity by invoice number:** will list all invoices and give a running total at any point in the day.
7. **Sales History:** will show total sales history for a given period of time.
8. **Rental Reports:** will show all rental operations for a given period of time.

Simply enter the desired option to generate and print the report. 

will halt the printing.

Rental
To set up rental rates: chose Utility menu within the complete goods menu
Set up rental rates. Chose rentable complete goods (CG that have an “R” in the code in complete goods

To set an item for rental you need to change the code from I to R

You will need to set up the rental rates in the utility menu on the Complete goods heading

To rent a piece of equipment, start in the invoicing screen, and choose the customer you wish to rent to, Press F8 to change the department to Rental. Pick from the menu which task you wish to do , if renting a window will pop up with dates , 1D will be one day 2D 2 days etc 1W,1M etc. or you can pick actual dates F7 will provide the current date.

Press enter, if you wish to rent now select “OUT” enter the tag number, choose to rent from rate table or override price

To extend the rental chose extend, the unit on rental will appear in the window select the item and enter the new date or 1D, 2D etc that it will be returned

To return a piece follow the menus from return, you will be prompted to the date it was originally set up for return.

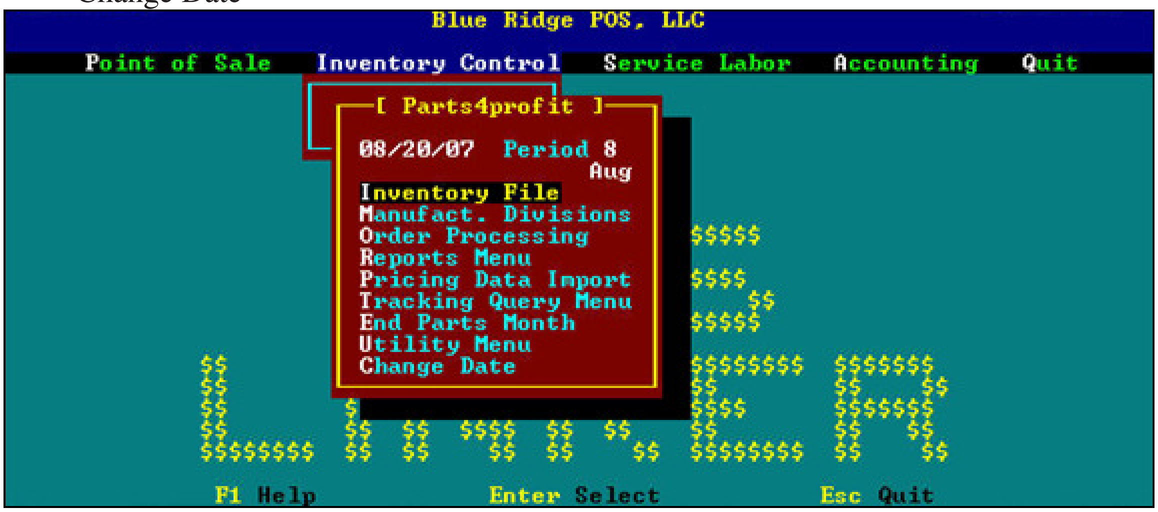
5. Inventory Control

In the above example of the POS LINKER Main Menu Screen, the highlight bar is on Inventory Control and the corresponding subtopics--*Parts* and *Complete Goods*.

Parts

If Parts is selected from Inventory Control, then the Parts4profit Selection Menu appears. Several choices can be made at this point from the subtopics as follows:

- Inventory File
- Manufacturer Divisions
- Order Processing
- Reports Menu
- Pricing Data Import
- Tracking Query Menu
- End Parts Month
- Utility Menu
- Change Date

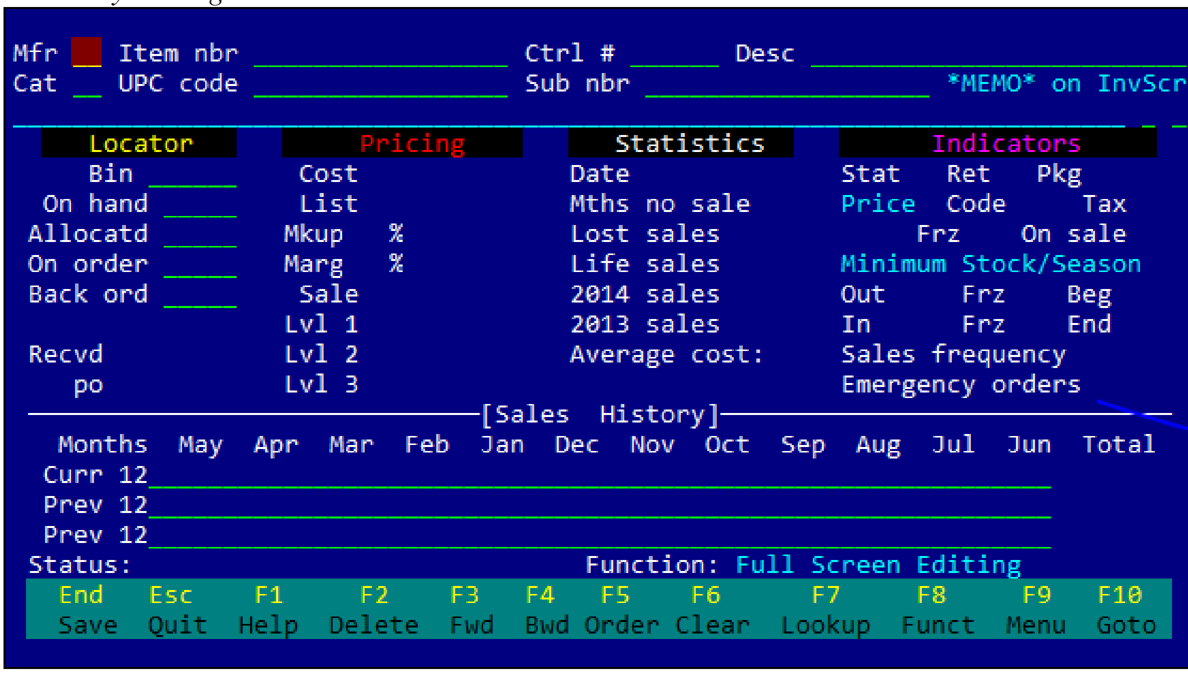


Whenever one of the above subtopics is selected, the appropriate data entry screen appears, as well as, its corresponding 

Help screens and special function keys.

Parts4Profit Inventory Management

Selection of *Inventory File* on the *Parts4profit* Selection Menu brings up the *Parts4Profit Inventory Management Screen*.



Parts Inventory Field Descriptions:

- **Mfr**: This is a two digit code that is set up under the Manufacturer Division screen.
  This field is case sensitive, it must be entered in upper case letters. The F7 key will show an index of available manufacturers. The user may scroll through the list by using the page up or page down keys, by using the up or down arrow keys, or by entering the two digit manufacturer code.
- **Item Nbr**: This is the part number field. If the part number is not known, pressing
  the F7 key will supply the following menu options:
- **Pricing** - lists all the parts available in the price list
- **Inventory** - lists all the parts that have an "In-stock" status
- **Sub-number** - lists all parts with sub-numbers If only a portion of the number is known the user may enter the known portion; POS Linker will search the list to match the entered criteria. Use the up/down arrow keys or the page up/page down keys to scroll through the list.
- **Ctrl #**: This number is assigned automatically to each inventory part item by POS Linker. Pressing the enter key twice will advance the cursor to this field. This field can save key strokes if the user knows the control number since it is often shorter than the part/item number. This field is also available in the Point of Sale Invoicing screen.
- **Desc**: This field provides a description for the part selected. This is automatically filled in by POS Linker if the user has subscribed to the price list for that manufacturer. The user may override or enter a new description.

- **Cat:** This field is used to query the parts inventory by providing search criteria in "F7 Parts Info" section of the Invoicing screen. For example, the user may query the parts inventory for all the pulleys. The "Categories" are defined by the user in the "Utility Menu" under Inventory Control - Parts4Profit menu. The categories can be defined or updated at any time using the Utility menu for global changes, or in the Inventory File for individual part category changes. This field is also indexed by pressing the F7 key.
- **UPC Code**: This field is used to store the bar code number of the part. At present, very few manufacturers provide this information in their price files. The user may either scan in the UPC number manually or use the Utility menu under the Inventory Control - Parts4Profit menu. By selecting function #7 of the Utility menu, the existing part number is placed in the UPC Code field with all spaces and dashes removed. This gives the user two advantages: to sell parts without having to enter a manufacturer, and the user does not have to have a working knowledge of the manufacturer's part number layout.
- **Sub nbr**: This field is often provided by the manufacturer, and begins with the two digit manufacturing code followed immediately by the sub-number. The user may define optional subs, mandatory subs or sub assemblies. The type of sub is set by the Stat field.
- ***MEMO*:** The user may enter a message to appear on the Invoicing screen to alert employees, on the printed invoice to alert customers, or on both. A common message example is "No return on electrical parts."

Locator Section

- **Bin**: Bin location allows up to a 6 digit alpha/numeric description. It is very flexible and helpful for new counter personnel. The system can be very organized as described below or as simple as a plain text location description like attic, backrm, shelf, etc.

Note: One suggested numbering sequence is A01532. A describes the unique location, specific area or building, row 01, 5 is the shelf level numbered from the bottom (start with the floor being 0), and horizontal location 32.

- **On hand**: This field indicates the quantity in stock or "on hand".
- **On Order**: pressing the F7 key will tell you what order it is on
- **Allocated**: Indicates how many parts are on saved invoices. This number will include parts that were placed "on order" by the Special Order Parts module from the Invoicing screen. These will continue to show as allocated until the customer picks up the parts and they have been invoiced. the F7 key will tell who it is allocated to
- **Back ord**: Indicates the number of this item that have been back ordered. Back orders may be entered here or from the Parts4Profit Order Processing screen.

- **Rcvd**: Shows the last date this part was received through the Parts4Profit Order Processing module.

Pricing Section

- **Cost**: Displays the cost of the item. This field may be edited at any time.
- **List**: This is the manufacturer's suggested retail price. We suggest that this field not be altered. The retail price is set globally for each manufacturer division, and the user may change this individually by using the "Mkup" (markup) field
- **Mkup**: Use this field to alter the retail price for the selected part. The retail price is displayed immediately to the right.
- **Marg**: This is calculated automatically by POS Linker. (List price - Cost / List price) This reflects your dollar margin on each part and displays it immediately to the right.
- **Sale**: A sale is occasionally provided by the manufacturer, or can be entered manually. You must insert a "Y" in the "on sale" field for the "sale price" to show at point of sale.
- **Lvl 1,2,3**: Level pricing is defined globally in the Manufacturer Division screen. The user may edit the default values set in the Manufacturer Screen to the desired levels. (Further explanation is provided on pg. 5-13)

Statistics Section

- **Date**: Displays date control number was established.
- **Mths no sale**: Displays how many months since the last sale.
- **Lost sales**: Displays the number of lost sales if they were recorded from the Invoicing screen at Point of Sale.
- **Life Sales**: Displays the total life sales for the selected part.
  - **XXXX sales**: Displays the total sales for the previous calendar year.
  - **XXXX sales:** Displays the total calendar year sales two years prior to current year.
- **Average cost:** Displays average cost.

Indicators Section

- **Stat**: This field determines the stocking status or the type of substitution if there is an entry in the Sub nbr field. Hitting the  key will bring up a menu of stock codes. Valid entries are:
  - **Stat Status**
  - **Blank** Regular stock
  - **A Auto phase out**-if the part has had no sales history for the number of months specified in the Manufacturer Division screen (18 mths (Default0
  - **B Bulk** - An assembly or group of the same part that can not be broken down further. **Example:** a cut loop of chain.
  - **C Carton** - Similar to the bulk stat code, except that the carton can be broken down further. **Example:** Case of oil - can be broken down to eight six-packs and the six-pack can be broken down to six singles.
  - **H Sales history** of this (stat code R) part is transferred to the new part during the month end close. If the part has zero on-hand.

- **M Master Part** - in most cases this is the OEM part number. A part with the stat code M allows the user to sell a substitute or generic part as an OEM part. The part is sold under the OEM number with the OEM's pricing structure but the inventory record of the sub-number is altered to reflect the quantity changes. Sales figures will reflect the sub-numbers cost & the OEM's retail price. In the Inventory Control file, enter a sub part number preceded by the two digit manufacturer code and place an "M" in the stat code. POS Linker will sell any units in stock of the OEM part before it sells any of the sub-number
- **N** Non-stock part
- **R** Replaced part (superseded by manufacturer)
- **S** Optional sub (offers a choice at invoicing)
- **Ret Return codes**
- **Blank** Returnable part
- **N** Non-returnable part

* **Pkg**: This field will be filled in by POS Linker if the manufacturer provides the information in the price file. This field can also be entered manually if structuring a package break down. (Examples shown on pg. 5-10)
* **Code**: This field will be filled in by POS Linker if the manufacturer provides the information in the price file. This field usually denotes different discount factors used to
* compute dealer cost.
* **Tax**: This field designates the appropriate tax for the selected item. The F7 key provides a look-up menu. The tax table is set up during installation, and any changes should be done under the direction of your distributor or Blue Ridge POS, LLC.
* **Frz**: This field is used to freeze the pricing structure for the selected part. Freezing the part will not allow the Price Data Import feature to alter the item in any way.
* **On sale**: This allows the part to be sold at the "Sale" price. Sales pricing occasionally is provided by the manufacturer. Valid entries are:
    - **Blank & N:** Prevent the part from being sold at sale price
    - **Y:** Allows part to be sold at sale price
    - **Out**: This field indicates the minimum stock quantity you wish to have "out" of season. This can be manually set and frozen, or you can allow POS Linker to calculate the quantity for you by utilizing the option under "End Parts Month" . POS Linker calculates based on settings in Manufacturer Division "Defaults" setup. The system looks at the sales history for the indicated number of months and calculates out/low & in/high for the number of weeks indicated.
    - **Frz**: Allows you to freeze the stocking level to the immediate left. Parts Month End procedure will change the stocking quantities if not frozen.

- **Beg**: This field sets the beginning of the "season" for this part. The default season for each manufacturer's parts are set in the Manufacturer Division screen. Parts in this industry often have very strong seasonal trends & this feature is beneficial for appropriate stocking during your busy months. The following chart defines the months:

Season Codes: (Active sales months)	
1 Jan	**7 Jul**
2 Feb	**8 Aug**
3 Mar	**9 Sep**
4 Apr	**O Oct**
5 May	**N Nov**
6 Jun	**D Dec**

- **In**: This field indicates the minimum stock quantity you wish to have "in" season. This can be manually set and frozen, or you can allow POS Linker to calculate the quantity for you by utilizing the option under "End Parts Month". POS Linker calculates based on settings in Manufacturer Division "Defaults" setup. The system looks at the sales history for the indicated number of months and calculates out/low & in/high for the number of weeks indicated.
- **End**: This sets the end of the season for this part. The default season for each manufacturer's parts are set in the Manufacturer Division screen.
- **Sales Frequency:** Displays the number of times the part was sold.
- **Emergency orders**: Displays the number of times this part was ordered on an emergency order.

The sales history for the selected part is displayed along the bottom of the screen. The history is broken down monthly for 36 months. The current parts month is listed first. The monthly sales history is updated live at point of sale. It is important to follow that procedure every month for accurate sales figures.

Pressing F1 Help provides three Parts4Profit Data Entry Help Screens which give appropriate information for data entry at the Inventory Management Screen. The following is covered:

Data Entry by Item Number:

a) Type a mfr code and item number. (Use F7 to lookup.) Press ENTER. If the item is on file, all information on the item will display ready for updating. Inventory tracking records are checked, followed by price list when the item number is not found. (A beep signals a new record and a control number is assigned.)

b) After entering or changing the record, press END to save it.

Alternate Entry Methods:

a) UPC Code - Press ENTER when “Mfr” is blank. Cursor moves to “Item Number”. Scan or type the UPC barcode and the item will display if it is on file.

b) Control Number - Press ENTER at “Item Number” when it is blank. Cursor moves to “Ctrl #”. Enter the control number and the item will display.

Relative Movement:

Movement order is determined by display method. Press F3 to move forward or F4 to move backward one record.

Deleting a record:

Display the part record on the screen using a technique explained above. When the correct part to delete is displayed, press F2. A verification window appears to prevent accidental erasures. If the part is currently on an open service order, parts order, or saved invoice, the delete operation is cancelled. Remove part from the order/invoice, then delete.

Starting over:

Pressing F6 will clear all fields on the screen and release the locked part number to other users.

To Enter New Parts Inventory:

a) choose “Parts” from the “Inventory” menu.

b) Press F8, and the function menu will appear. You will use your arrow keys or the letter to select “New Inventory”.

c) the cursor will be flashing at “Mfr. code”. Enter the two letter code for the part you are entering, or use F7 to look up the manufacturer. (ex: TO =Toro)

d) Enter the part number, or again hit F7. F7 will bring up the very first part number listed in the manufacturer’s price list that was installed during your system setup. Once you select a part number, either by entering it by hand or selecting one from the F7 lookup the description, cost and list price will automatically be pulled into the screen.

e) Enter the number you have on hand and the bin location. Press END to save.

The screen will clear and the last part number you entered will still be displayed in the Item nbr field. Type the next part number over it, or F6 to clear the screen or use the F7 key again.

The next page shows several examples of the possible breakdowns on quantity items, such as chain and oil. The manufacturer will have a part number for the bulk item, you will have to create the breakdown numbers and descriptions in most cases.

Package Quantity Breakdown Examples

SAW CHAIN:

CTL# MFR PART # DESCRIP STAT SUB# PKG QTY
22 SH 33RS One link of 33rs C SH33RS-100FT 1640
21 SH 33RS-100FT 3/8 050 Rpd Chsl
(1640 links)
20 SH 33RS-72 3/8 050 Chsl (loop) B SH33RS 72
(72 LINKS)

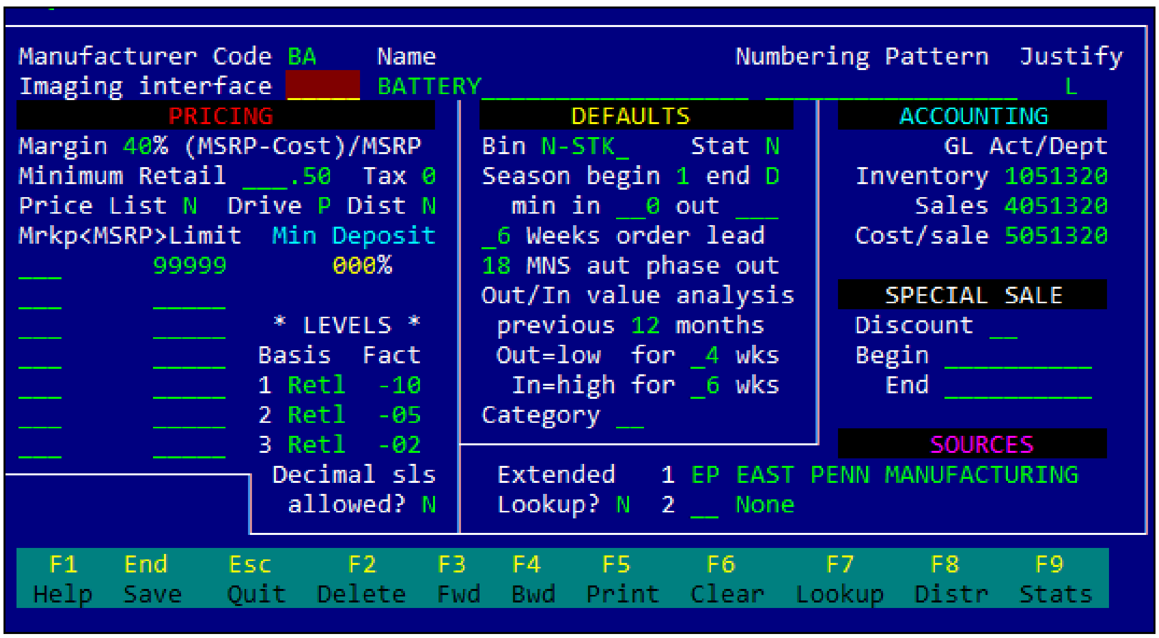
CASE EXAMPLE

CTL# MFR PART # DESCRIP STAT SUB# PKG QTY
15 SH 0000-000-1013 Bulk Files
(5/32" - Pkg of 10)
16 SH 0000-000-1013 1 5/32 File C SH0000-000-1013 10

Oil Mix Example

CTL# MFR PART # DESCRIP STAT SUB# PKG QTY
12 SH 0457-970-0122 Oil Mix (Case of 8 six packs)
13 SH 0457-970-0122 6 6 pk Oil Mix C SH0457-970-0122 8
14 SH 0457-970-0122 1 Oil Mix bottle C SH0457-970-0122 6 6

Parts - Manufacturer Division Screen



Selection of "Manufact. Divisions" on the Parts4profit Selection Menu brings up the above Manufacturer Division Control Screen. Manufacturer Divisions must be set up for each parts line, including miscellaneous items. Pressing F1 for help brings up the Parts4Profit Manufacturer Division Help Screen which offers appropriate information for the Manufacturer Division Control Screen.

Field Descriptions

Manufacturer Code: Pressing F7 will give the user an option to choose either the current manufacturers or an industry list from which to choose a new manufacturer's set up. Type the two-letter manufacturer code. If the code is on file, the current data on that code will display. Otherwise, the computer will sound a beep and the status field displays “New control record”. Type new data and save or press F6 to clear the screen and start over. After entering or changing the data, press END to save it.

Numbering Pattern: this outline field is optional. It serves as a default guide for parts numbering and is typed over as the number is entered. Counter personnel new to the business find this especially helpful. To utilize this, simply insert the number of characters in the part number with one of the following suggested symbols:

- **#** = digit character,
- **!** = alpha character,
- **-** = dash character.

Justify code: This field is provided by Blue Ridge POS, LLC during system installation and setup. It is also included in the "Industry" list available under F7 lookup.

Pricing Section

Margin: This is the manufacturer’s suggested retail minus dealer cost divided by the suggested retail. The system provides a default percentage which can be manually overwritten.
Minimum retail: This field allows the user to set the minimum price for which a part can sell.
Tax: This field establishes tax calculation for part pricing at Point of Sale.
Price List: This field should be “Y” if the entire manufacturer’s price list has been installed. If "N" is in the field, inventory price items will not be updated during the Price Data Import procedure.
Drive: DOS drive letter where the price files are loaded.
Dist: This field indicates whether or not this manufacturer pricing is setup with Level One and Level Two to accommodate distributor type sales. The default setting is "**N**".
Markup: is the percentage of list price added to get the retail price. (Example: if markup=10% and list=$20 then the retail is $20+$20x10%=$22) You may set markup at different limits; however your final limit should be "99999".
Min Deposit: Indicates the minimum deposit percentage allowed on special orders for this manufacturer.
LEVELS: please see the following explanation on pg. 5-13.

Default Section:

The following values will be automatically used when a new part record is created. These values may be overridden on the inventory screen of individual parts.

Bin: Indicates default location. This is an optional field.
Stat: Indicates default stocking status for this manufacturer. The same codes as explained on pg. 5-5 apply.
Season begin/end: Indicates the default seasonality of this manufacturer's parts. Season codes as explained on pg. 5-7 apply.
Min in/out: Indicates the default minimum stocking quantity for this manufacturer in and out of season.
Category: A default two digit code determined by the user to categorize or group parts. This field is optional.

Additional Settings:

Weeks order lead: Indicates the number of weeks lead time for the system to calculate a suggested stock order.
MNS aut phase out: Indicates the number of months of 0 sales needed before the system will "phase-out" this part.
Out/In value analysis: Allows you to set values used by the system to calculate the necessary minimum quantities for in/out of season stock.

Accounting Section

The user's system must be "linked" to the POS Linker General Ledger in order to use this feature. The user would enter the G/L account for Inventory. Sales and Cost of Sales accounts are automatically referenced.
Special Sale: allows the user to set up a "sale" of this manufacturer's parts, indicating a global sale percentage and beginning and end dates.
Sources 1/2: Allows the user to indicate the distributor(s) for this manufacturer used when special ordering parts.
Extended Lookup? "Y" or "N" indicates the ability to lookup other distributors at the special order screen.

Level Pricing

Dealers will often wish to set different levels of pricing for certain groups of customers, such as commercial accounts, government agencies, or other dealers, etc. These levels are also established on the division control screen of each manufacturer.

Each level is established with the basis equal to cost, list, retail or margin plus or minus a percentage factor. Once the levels are established, you must indicate on each customer's account which level pricing, if any, they receive.

You will also use the Division control screen to setup your Distributors or Vendors for each of your manufacturers.

a) Select F8. The cursor will be flashing at the "Code" line.

b) Enter a two letter code for your distributor and then the full name. You may also enter your sales representative, account number, etc. if you wish.

c) You must indicate which manufacturers are handled by this distributor by pressing F9. This will place the cursor on the right hand side of the screen. You will again enter the two letter code for each manufacturer.

d) Press END to save any information.

e) F7 will list distributors on file.

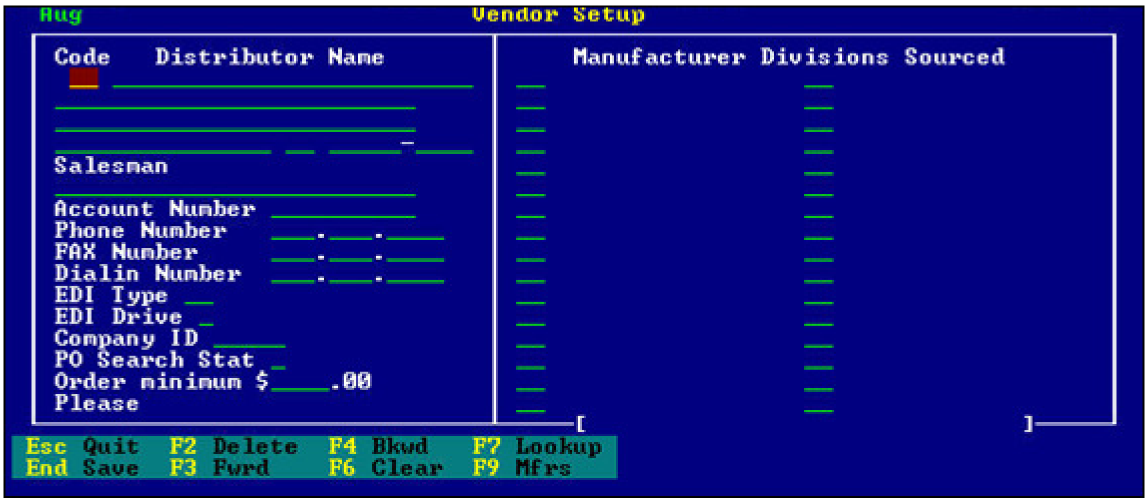
Function Keys

F3 - allows the user to scroll forward through the manufacturer list

F4 - allows the user to scroll backward through the manufacturer list

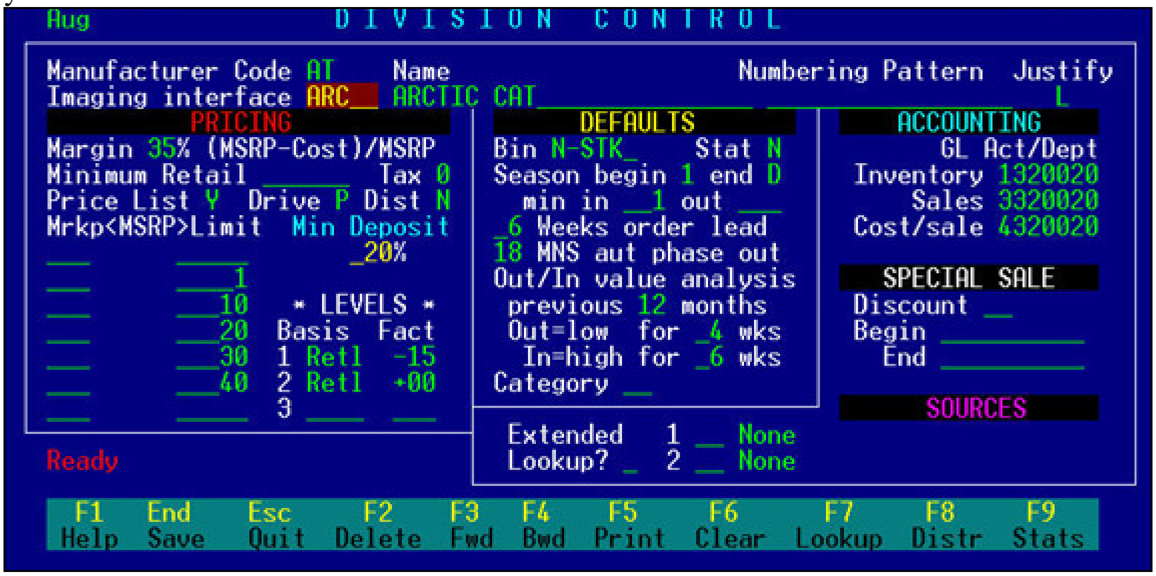
F6 - Clears the screen of all data. This function does not delete the data.

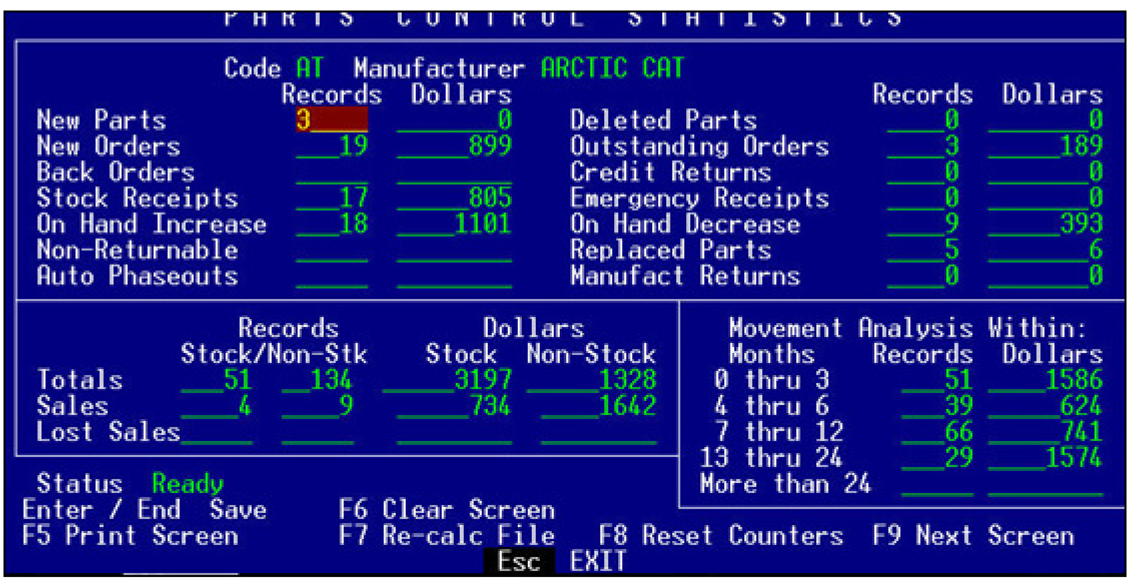
F8 - Distr - This is your Vendor setup area. This function allows the user to install all Distributor information, including account number, phone, contact name, etc.
Required fields include:



- **EDI type** - Press F7 to select the appropriate Electronic Data Interchange for this vendor. If you do not use EDI, select 1.
- **EDI drive** - this will be determined by your business system vendor. Legal drive letters are M through Z.
- **PO Search Stat** - This field determines the search criteria when entering a new order for this vendor. For example, if this status is 1 - Building, then the system will alert you that there may be existing "Building" orders for this distributor.
  Your search status codes are:
  a) 1 - Building
  b) 2 - On Order
  c) 3 - Received
  d) 4 - Back Ordered

You can find the total dollars in parts for any Manufacturer by starting in *Inventory Control*, in the *Parts Section*, clicking on *Manufact. Divisions*. Key in the Manufacturers code you wish to check and press F9. Press F7 to recalculate and total your stock and non-stock dollars.





Order Processing - Parts

The ability to build, send, and receive orders over the computer will significantly reduce work load and increase the efficiency of your business. Parts order processing allows orders to be built using the current price list loaded in the computer, as well as any inventory already entered.

<u>To Process an Order</u>:

a) Enter the two character distributor code or press F7 which allows the user to select a distributor list or view order items. If order exist in the system you may use "**" to skip the code and view all orders.

b) Enter the number for the order, or press F7 to lookup existing orders. If it is a new order the system will default to date followed by the distributor code or you may enter your own order number if desired. The system will prompt for the "order type", such as fill-in or emergency, select "fill-in" for normal parts ordering process.

c) Enter the date - pressing enter will default to the current date, or you can change the date as needed.

d) Select the status of the order:

- **Building**: New order status (Default)
- **On Order:** An order that has been built, sent, but not received.
- **Rcvd**: Parts have come in; order has been received in inventory.
- **Back Ordered:** Parts placed on back order, not received.

e) Enter description if desired - this is not a required field.

f) If Special Order items exist for this distributor, they will be displayed for selection. Otherwise you may enter the Manufacturer for the part you are ordering or press F7 or lookup.

g) Enter part number, or press F7 to select from Inventory file, order items, or by price list. If the part number is new, the system will ask you to enter a description, otherwise it will automatically be entered.

h) Enter the quantity you wish to order, and make any adjustments to pricing as needed. Pricing changes, etc., will be saved to the master inventory record.

i) If all information is correct, press END to save. The order items will be placed on the right-hand side of your screen for review.

j) Continue this process until entire order is complete.

k) If you would like a printed copy of the order, press F5 for a menu of send/print options. If your system is set up for on-line ordering with a distributor, you may select the EDI file option for electronic filing, otherwise you may print your order for faxing.

You may also leave your order and come back to it later to add more items. Pressing "ESC" will exit the order processing screen and will not lose your order. When you are ready to return, simply re-enter the distributor and order number will appear.

<u>Receiving An Order</u>:

a) When your order arrives, enter the distributor code.

b) Enter the order number or hit F7 for a list of all orders. F7 lookup is area sensitive and allows order numbers, distributors and even individual parts to be viewed and selected.

c) If all items ordered are received, you may select F8 to receive the items. The system will prompt you to receive with or without backorder items. Receiving backordered items is convenient when items originally backordered are shipped.

d) If one or more ordered items are backordered, you may indicate which items by entering the manufacturer code, and then F7 under Part Number. Select Order Items.

e) This will display a listing of all items ordered for this manufacturer. Highlight the item backordered and hit ENTER

f) Press F9. System will ask you to indicate the quantity to backorder, unless quantity ordered is one.

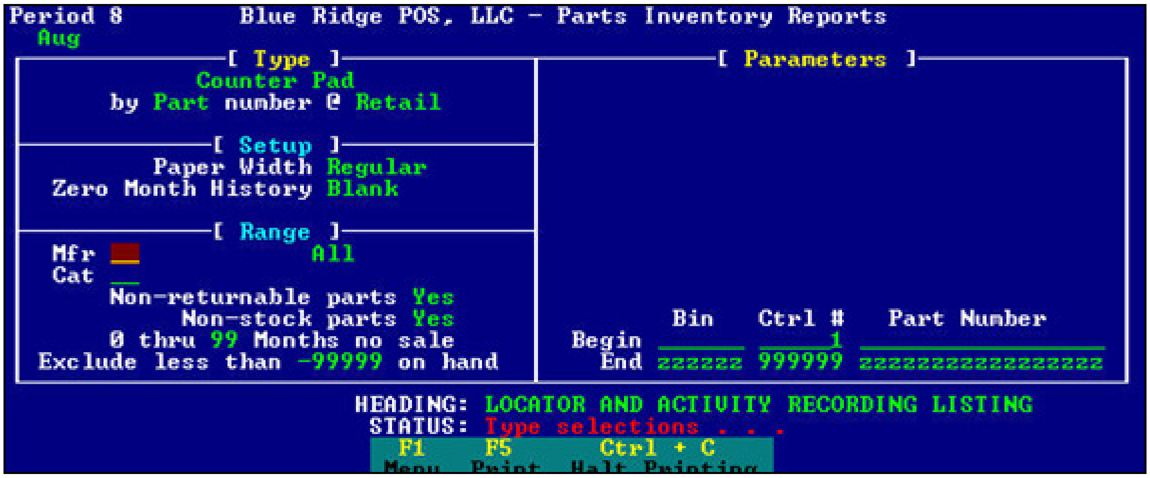
g) Repeat process for all backordered items.

h) Press F8 to receive the order; elect to receive without the backorders. You may receive the backorder items by the same method when they are received.

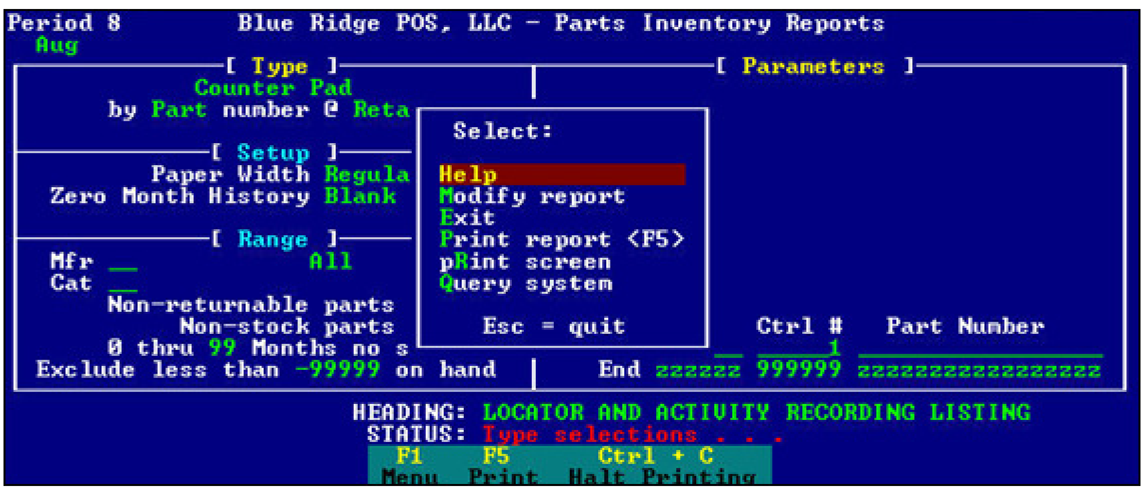
If every item originally backordered needs to be received, then receive including backorders. If selected items need to be received, look them up by pressing F7 (order items) and display the item. Press F9 to un-backorder in a fashion similar to backordering.

Parts -Inventory Reports Menu

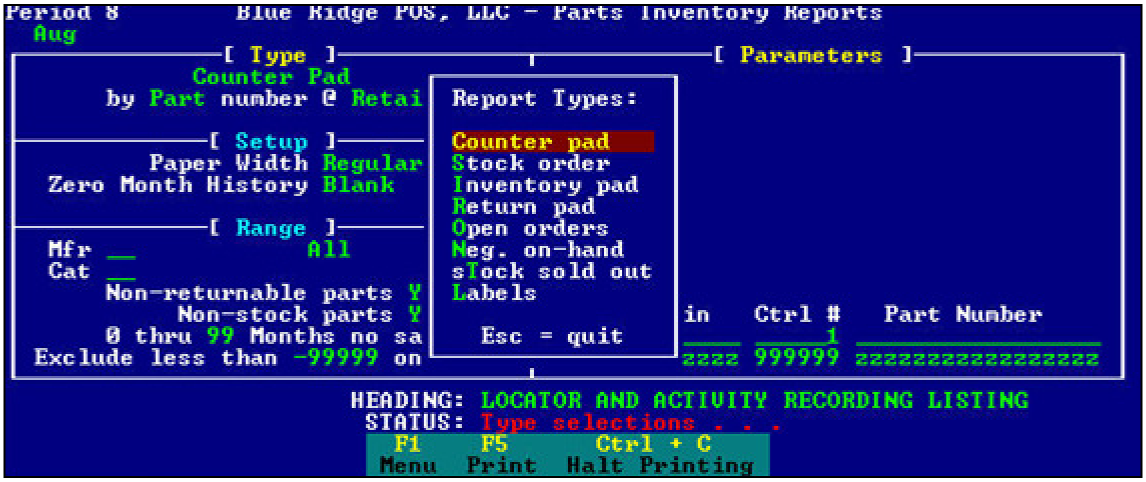
The report module allows many useful reports to be generated by the computer.



Use  to bring up the Parts Inventory Reports menu. That allows the report variables to be modified and thusly, a custom report for most needs can be produced.



This is also how to exit the report module. The modify report screen shows the more common reports available.



Counter pad: as the name implies, is designed to be used on the counter by the counter staff to price and locate parts in the event that the computer is not available. We recommend printing a counter pad for all manufacturers on a monthly basis; you may print all parts, by bin location or control number. If the user is on a "Bin Location" system, we recommend printing a new counter pad for any manufacturer from whom you have recently received a large number of parts. The pricing data is at retail price.

Stock Order: the system will report a suggested stock order based on previous sales history. You may select seasonal minimum, quarterly or pre-season stock suggestions.

Inventory Pad: obtain inventory count by manufacturer, sorted by either part number, bin location or control number. Pricing data is displayed at dealer cost.

Return pad: reports suggested parts to return based on sales history.

Open orders: displays all orders on "Building" status

Neg. on-hand: reports all negative quantities on-hand in parts inventory.

Stock sold out: reports all regular stocking parts that are sold out or zero on-hand.

Labels: labels by either part number, bin location, or control number.

The most commonly used reports will be the inventory pad, and the stock order. The inventory report will allow you to obtain inventory count by manufacturer, sorted by either part number, bin location or control number. The stock order will aid in replenishing your inventory, optimized by seasonality.

The Parts4profit system will allow you to create a stock order and transfer it to a purchase order automatically.

Stock Order to Purchase Order:

a) Select Report Menu, in reports screen, hit ESC for menu options

b) Select Modify Report - choose Stock Order, fill in parameters as desired **Mfr. Code must be filled in to complete the Stock Order

c) On Stock Order screen, press ESC for more menu options

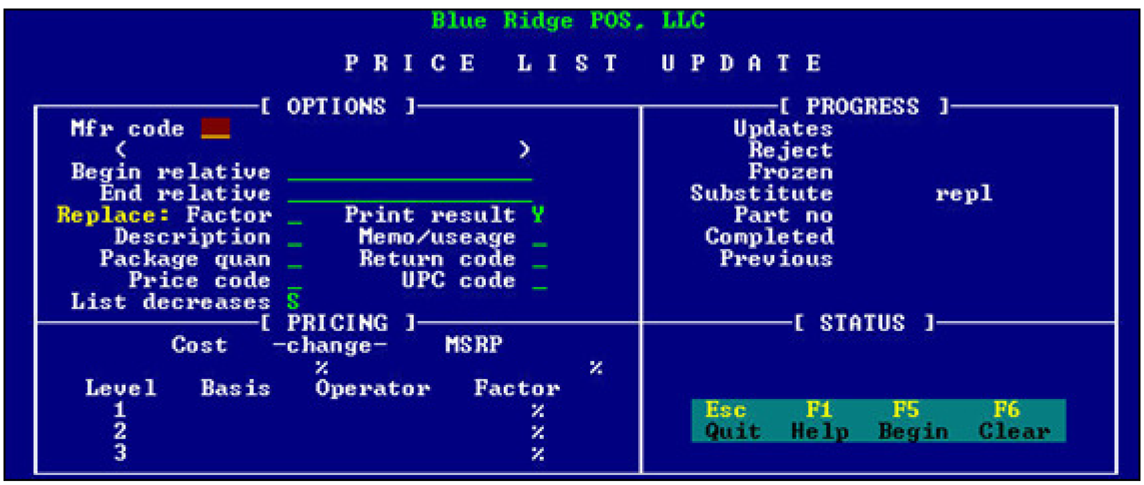
d) Choose Print Report - this will allow you to review your order before creating the purchase order, or

e) Choose Create Order if you have previously printed & reviewed the order

NOTE: You may enter your own purchase order number by typing over the default number.

Pricing Data Import

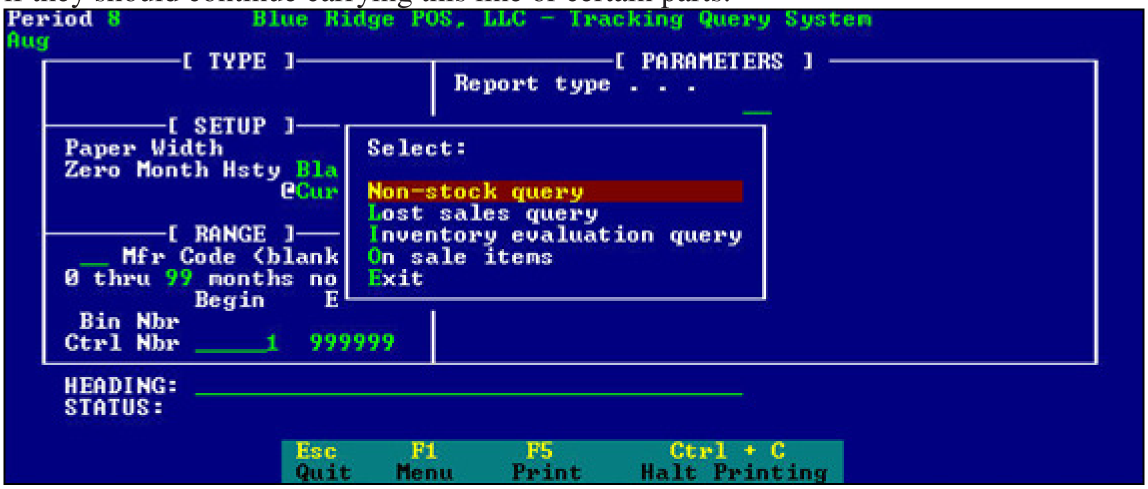
This feature is used to update manufacturer's price lists and parts inventory file information. Any changes made to a manufacturer division concerning pricing must be followed by this procedure to apply the changes to all inventories for that particular manufacturer.



You must enter a manufacturer code at the prompt, and leave the "Begin relative" field blank. Make the appropriate changes to the remaining parameters. It is generally a good idea to print the results especially in the case of price updates. Once parameters have been set, press F5 to begin the process. The right hand side of your screen will display the progress and give the total number of scanned and rejected part numbers.

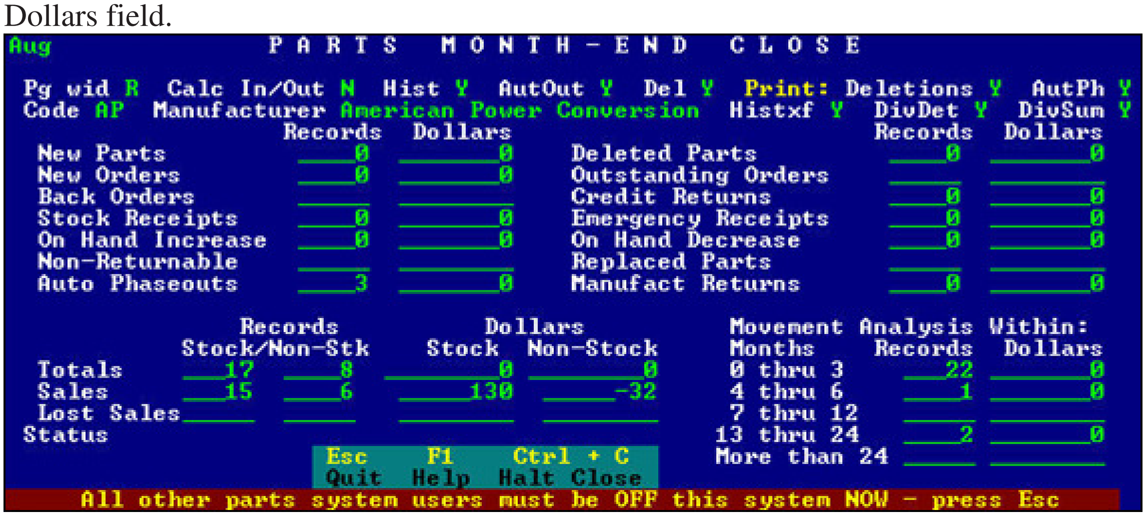
Tracking Query Menu

This feature allows the user to determine several inventory decisions. You may use this to identify your excess stock and number of lost sales. The user may also evaluate inventory based on sales history for a certain period of time, and thus determine if they should continue carrying this line or certain parts.



End Parts Month

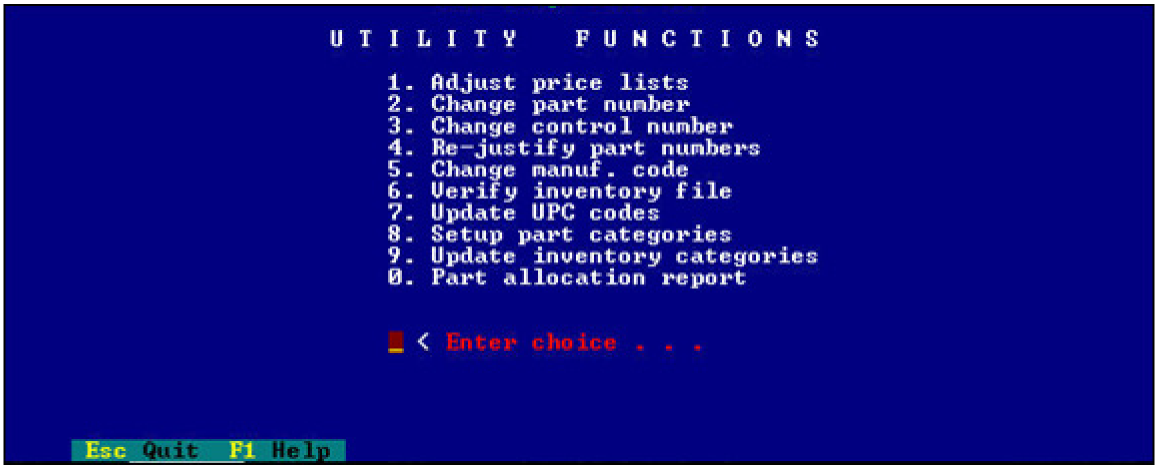
The month end parts reports will indicate which part lines are turning well and which lines may be overstocked or not selling as well. All values are at dealer cost. Inventory values can be calculated by adding "Stock" and "Non-Stock" figures under the Dollars field.



This should be an integral step in your monthly closing procedure. This program can be run at any time, but should generally be run on the last day of the month. No other users can be on the system while parts month end is running. The system will give you an initial warning to close everyone down and to make sure you have run a backup before closing parts.

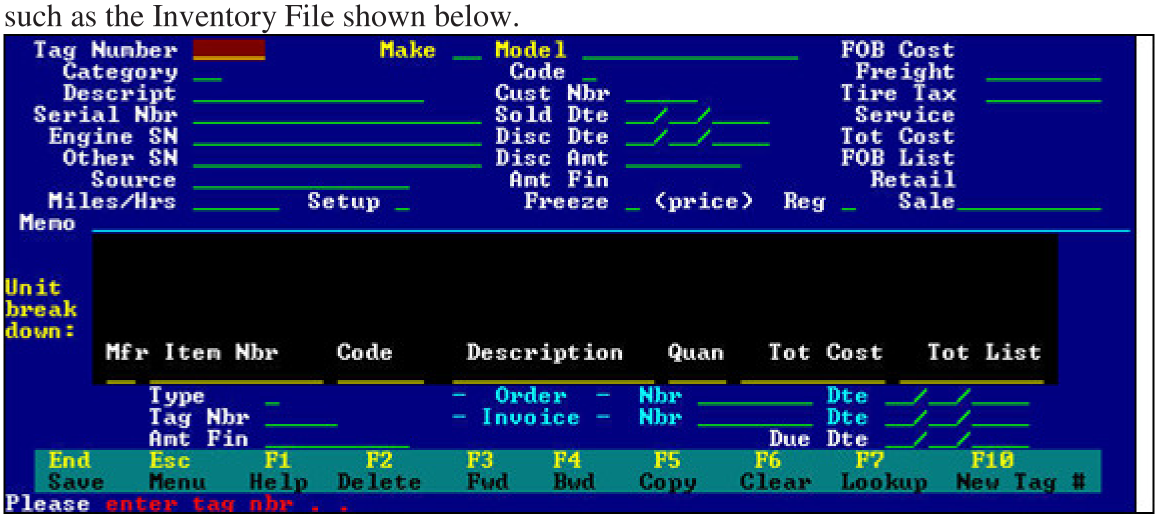
Utility Menu

The utility menu allows many functions such as changing parts numbers and control numbers.



6. Complete Goods

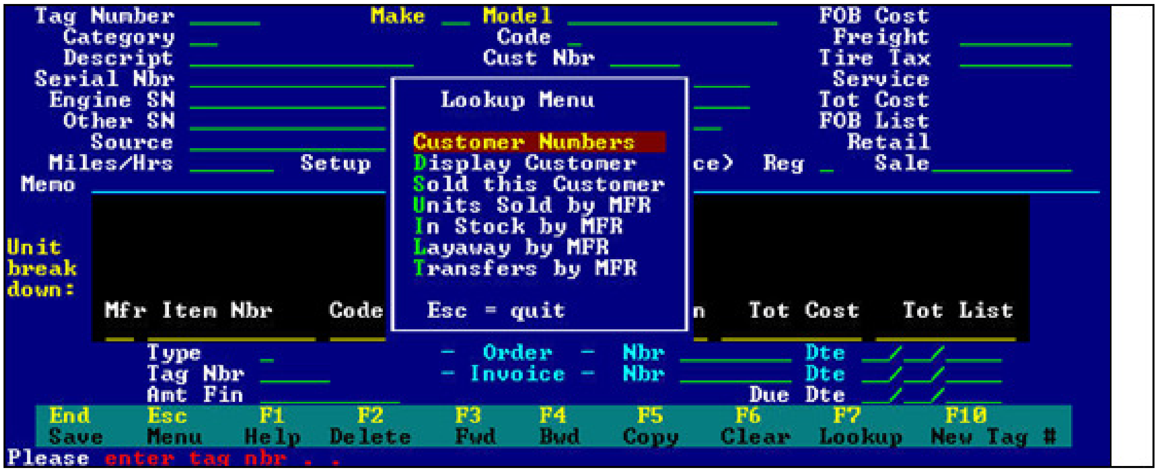
If Complete Goods is selected from Inventory Control, then the Complete Goods Selection Menu appears. Several choices can be made at this point from the subtopics such as the Inventory File shown below.



The complete good module has a manufacturer setup screen similar to the one used for parts. Manufacturer Divisions must be set up for every complete good manufacturer to be tracked.

Note: Many dealers find it helpful to create one division for all used equipment (ex: UG = Used Goods) regardless of the manufacturer, to simplify bookkeeping and better track sales and profits.

The lookup feature is very powerful in the complete goods inventory screen. It is helpful for tracking warranty information, product recalls, service intervals, and direct consumer sales.



Press F7 to lookup and depending on the field, POS Linker will track which customers have purchased a particular piece of equipment or what equipment a particular customer has purchased. This is also a good way to check what is in stock by manufacturer and what has been sold.

This information can be printed in a report and will speed many common chores such as checking floorplan and layaways. See "Reports" later in this section.

To check inventory on a particular manufacturer:

1. Enter the two digit manufacturer code in Make field. Model number is optional.
2. Press F7 and select "In Stock by Mfr" – this will display all available units for this manufacturer.

To track items sold to a particular customer:

1. Press F7 and select "Customer Numbers"
2. Choose appropriate customer. PG↑ or PG↓, press the first letter of last name to jump to a different position in the name file. Note the customer number is displayed. Press F7 again to display "Sold this customer" items.

Complete Goods - Inventory Field Descriptions

Tag Number: Identification number assigned to each complete good. This may be generated by the system by pressing F10. The system will assign the next highest number in the sequence. The user may also manually enter this number. However, caution should be observed by not assigning a number too large so that you are not limited on the number of inventory items.
Category: Optional field in which you may categorize complete goods for future reporting reference. Ex: TR = tractors, MW = mowers, etc.
Description: Unit description
Serial Nbr: serial number of unit
Engine SN: serial number of engine if applicable
Other SN: any other applicable serial number
Source: Distributor from which item was received
Miles/Hrs: # of miles or hours on the unit
Setup: Y or N for unit assembly or setup
Make: Two digit manufacturer code
Model: model # of unit
Code: Indicates stocking status

- **I** - In Stock
- **L** - Layaway
- **O**- On Order
- **R** - Rental
- **S** - Sold
- **T** - Transfer

Cust Nbr: indicates customer to whom the unit was sold, rented, ordered, etc.
Sold Dte: date unit was sold, or rented
Disc Dte: date any discount can be taken when the unit is paid
Disc Amt: Amount of discount if any (see above)
Amt Fin: Indicates any dollar amount borrowed or floor planned by the dealer at time it was purchased.
Freeze: Y or N to freeze price to prevent price from being changed at point of sale.
FOB Cost: Unit cost to dealer totaled from unit breakdown item costs.
Freight: Freight cost incurred by dealer
Tire Tax: Federal excise tax on tires
Service: Total servicing cost. Usually work orders internally charged to the equipment.
Tot Cost: Cost of item to dealer - this is totaled from dollar amounts in FOB cost, freight, tire tax and service.
FOB List: List price of unit. This amount is totaled from the unit break down list prices.
Retail: Retail price of unit totaled from FOB list plus freight, tire tax & service.
Sale: Sale amount. If there is an amount in this field it will automatically display in "flashing red" on the invoice screen at time of sale. When a sale is processed, or an item is re-priced at point of sale, the sale price will move to this field.
Memo: reserved for users to type special instructions or reminders, or a longer description of the base unit.

Unit Breakdown: This information will be filled in automatically if your inventory is entered through the order processing module. The user may also manually enter information. This is especially useful for adding accessories and any additional costs.

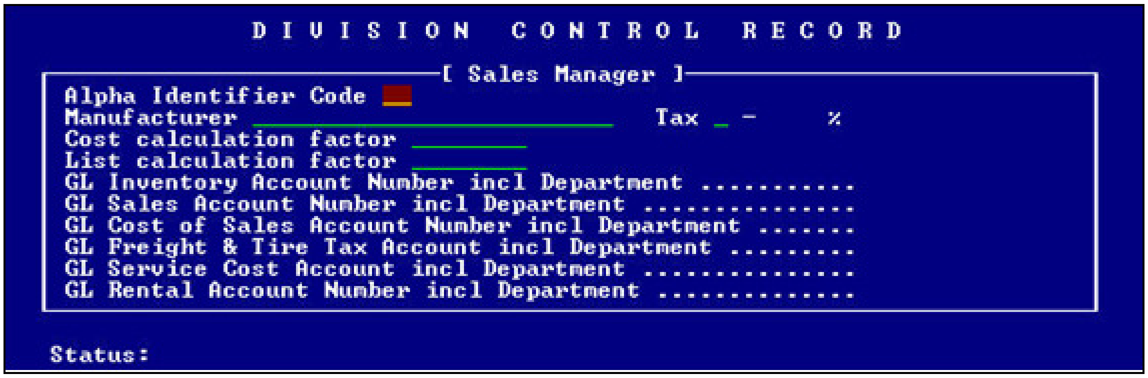
Once the tag number is displayed, simply use the arrow keys to move to the breakdown box, press END to clear and enter a new line, and then press END again to save the information. To edit information, press F7 at either the "Mfr" field for a list of makes & items, or pressing F7 at "Item Nbr" will display all items for this unit.

Type: indicates whether the line item is a whole good or service item.

- **W** = whole good
- **S** = service.

Tag Nbr: repeats tag number from top of screen. A unit break down item can be moved to a different tag number by changing this field.
Amt. Fin: Amount on dealer floor plan for the breakdown item displayed.
Order Nbr: displays the purchase order number used
Invoice Nbr: displays the invoice number of the vendor from which this unit was purchased.
Dte: indicates dates respectively of the purchase order and vendor's invoice.
Due Dte: indicates due date of vendor's invoice

Complete Goods - Manufacturer Division



This is similar to the setup of Parts Manufacturer Divisions. The user simply enters a two digit alpha code representing the manufacturer. Fill in the name on line 2 and enter the tax code. Pressing F7 will display the tax code listing.

The General Ledger account fields need only to be filled out if the user is on General Ledger. Press END to save all information.

Function Keys:

F8 **- DISTR** - allows the user to set up complete good distributor information. This information will be useful and is required for the Order Processing module. Enter a two character alpha code to represent the distributor. The remaining fields are optional but useful.

F9 - **STATS** - allows the user to calculate the number of complete good inventory records and dollar values of a particular line or for all manufacturer divisions.

F4 - Calculate all manufacturer divisions

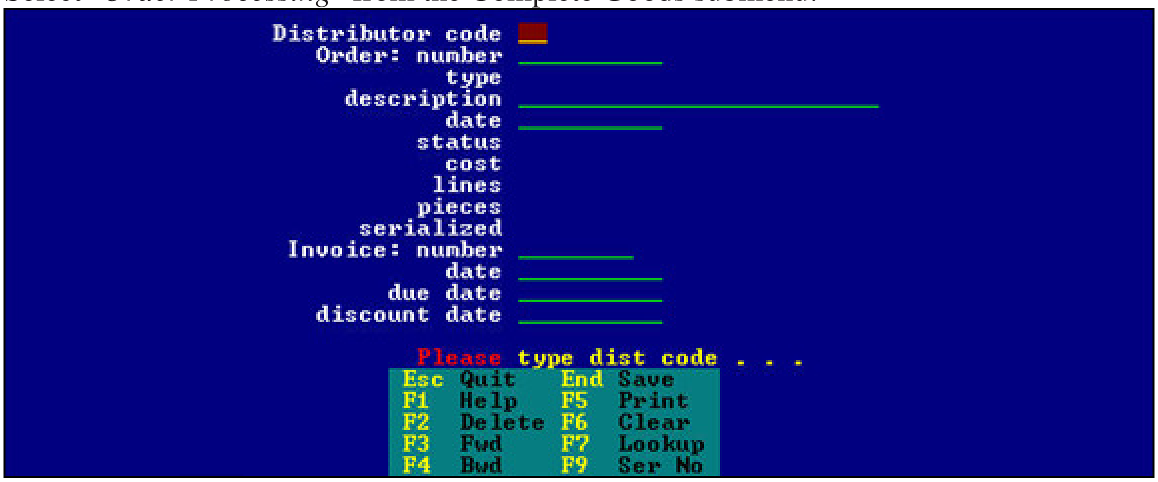
F7 - Calculate figures on the manufacturer chosen at Manufacturer Division screen.

Complete Goods - Order Processing

This module enables the user to create Complete Good orders through designated distributors and control back orders. It also provides an easy method of entering your initial inventory into the system. This method is especially useful if you have several of the same model numbers from one manufacturer.

To enter inventory/create orders:

Select "*Order Processing*" from the Complete Goods submenu:



a) Enter the distributor code, if known, or press F7 for listing of established distributors. Distributors are setup the same way they are in the parts option, through the Manufacturer Division screen.
b) Enter order number, or accept the system number.
c) Choose the order type: select "Fill-in stock" for entering inventory and ordering stock inventory.
d) Enter a description if desired. (Optional)
e) Enter date. System will default to the current date, you may accept or change.
f) Enter invoice number - leave this field blank if you are entering initial inventory. If creating an actual order, this field can be filled in when your order is received from the distributor and an invoice number has been issued to you.
g) Enter the remaining fields if you have the information available.
h) Entering after last field will take you to an item detail screen, or Screen #2. Here the user will enter the actual complete good detail information.

i) Enter the item make or press F7 for a listing.

j) Enter model & description, or enter all or part of the model, and press F7. This will give you an opportunity to copy the model, description and cost information from similar inventory that may have either been sold or entered into stock. In other words, once a model has been entered into inventory, pressing F7 is a shortcut key for copying unit information. F7 also gives you the opportunity to view other order items.

k) Enter the quantity of this model to put into inventory or on order. Make any adjustments to pricing if needed.

l) Be sure to choose whether the item is the Primary item or an Attachment. Category field is optional.

m) Order code is generally an order number or code from the distributor used for ordering this item. This field is also optional.

n) Backord Qty is utilized when an order is received and one or more items are backordered from the distributor.
*****See pg. 6-10 on "Receiving an order" for more detail on how to enter back ordered items.***

o) Press END when information is completed. This will move your item(s) to either side of the screen, depending on the status of primary or attachment, for your review.

p) **If you are using this module to place an order,** press ESC, and choose "Quit". This will take you back to the first screen.

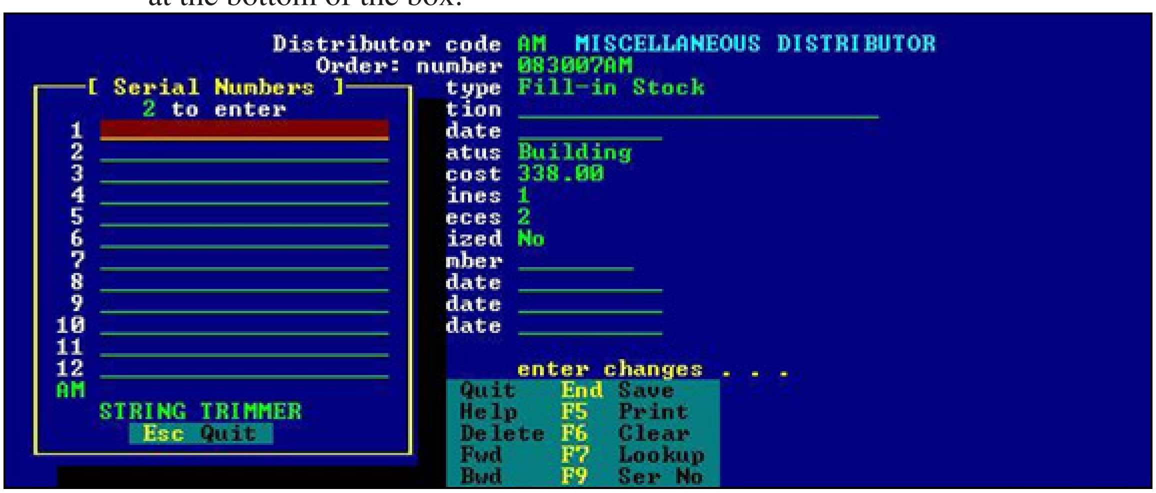
q) Select F5 for the following print/ordering options:

- **Order displayed:** prints the order information entered
- **** orders:** (** = Distributor code) displays all orders for that particular distributor.
- **All open orders**: displays open orders for all distributors
- **EDI file**: this selection will setup the order for dialin to your distributor and electronically download your order. The system will retain all information you have entered onto the order. You will not lose the order if you exit the screen now.

r) **If you are using this module to enter inventory,** press ESC, and choose "Quit". This will take you back to the first screen. At this point you would want to enter the serial numbers for your inventory items.

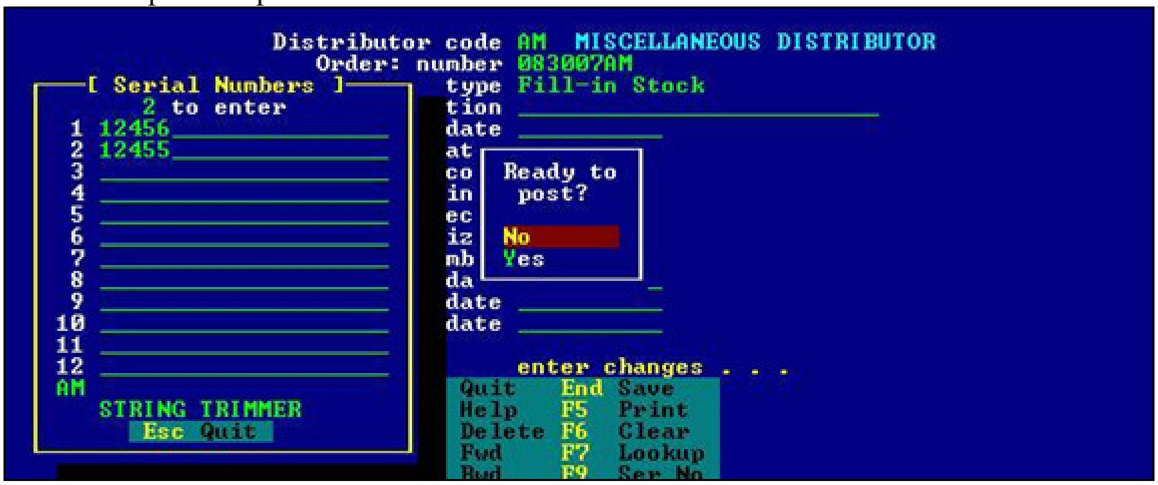
s) Press F9 - the system will prompt you to select if you are now ready to serialize, select "Yes"

t) The serialization box appears on the left side of the screen. The system will indicate how many serial numbers to enter for the make and model displayed at the bottom of the box.



u) During serialization, you will notice that the system automatically copies the number to next line if there is more than one of an item. Often the serial numbers on the items received are very similar and only a few characters need to be changed. Duplicate serial numbers are blocked.

v) Once all serial numbers have been entered for that model, the system will prompt the user to post the serial numbers. Select "yes". Items will continue to display in the box until all order/inventory items have been serialized. This is a good place to print the order with serial numbers.



w) To receive the items into POS Linker's inventory file press F7, this will take you back to the second screen, press ESC. At this point select "Receive order". Choose "All goods". The system will update your inventory on hand, and issue tag numbers for each item.

RECEIVING AN ORDER:

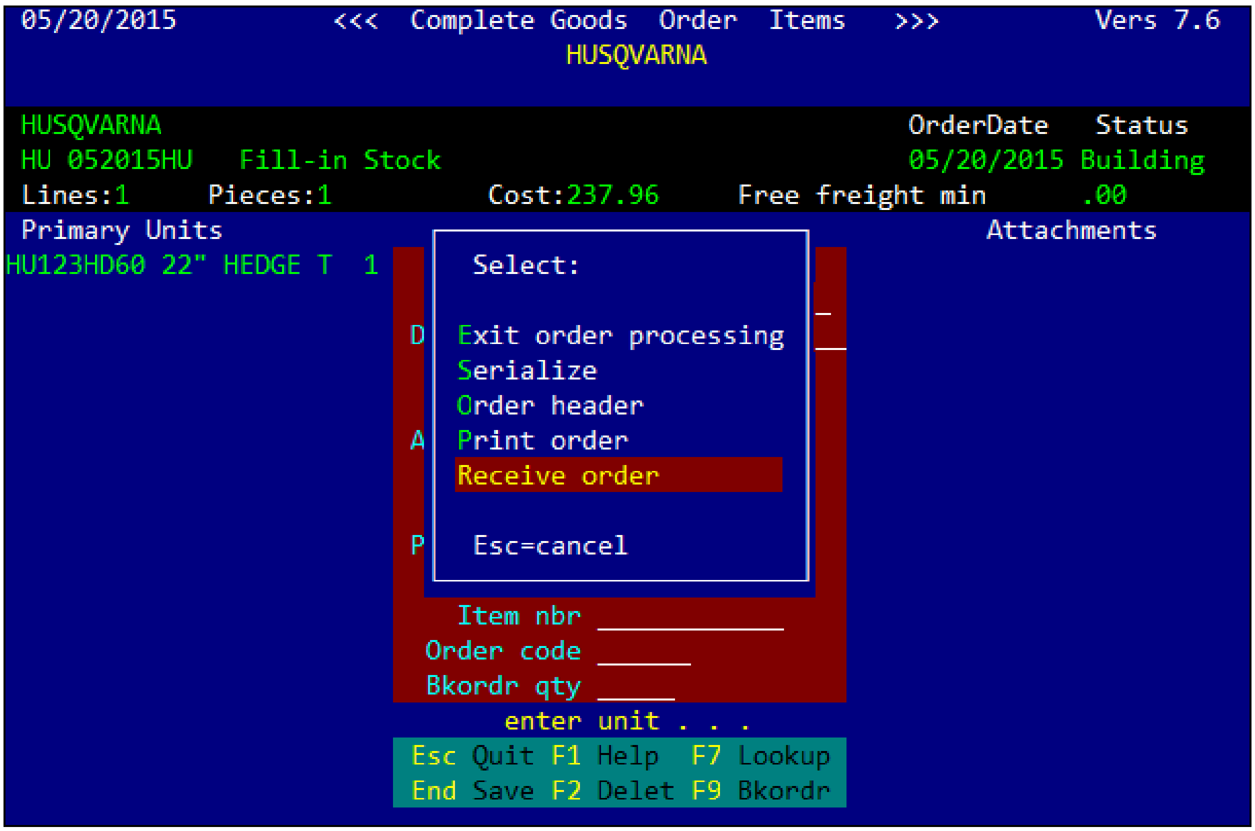
The following instructions are to be used when this module is used for actual order entry and not inventory entry.

a) At order processing screen, enter the distributor and order number. Order information should appear in the appropriate fields. (Pressing F7 at the "order: number" field will display choices)

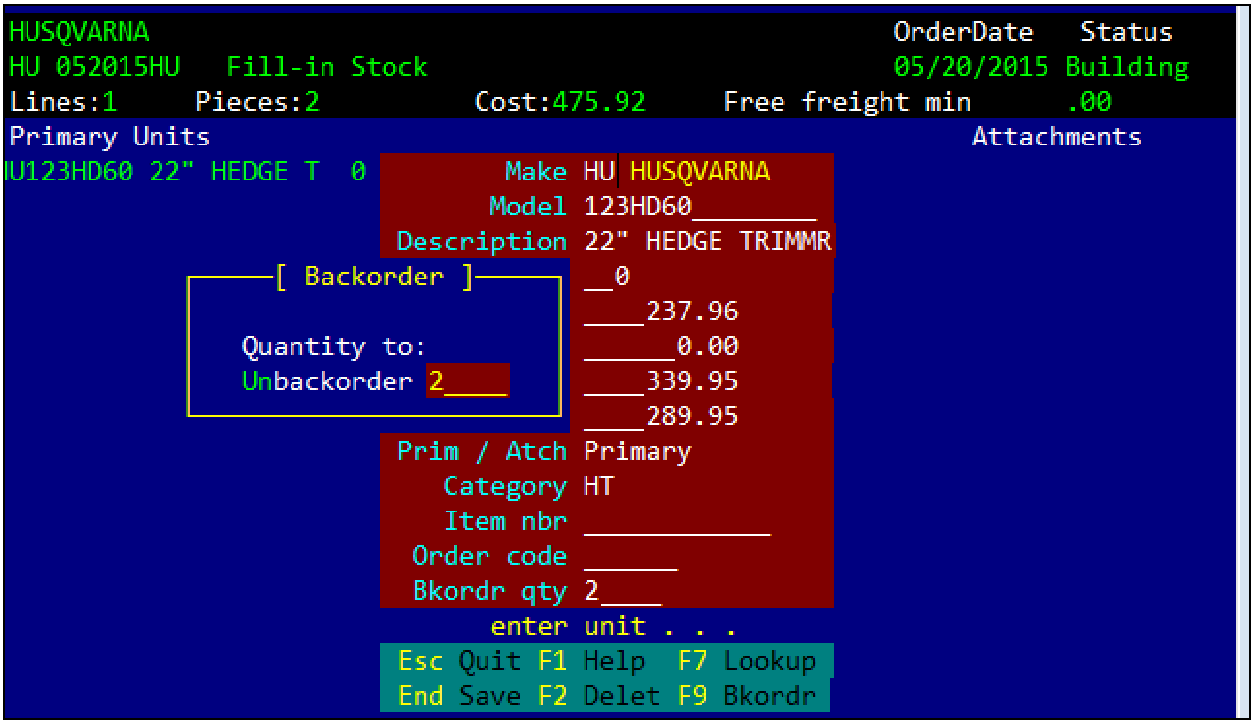
b) The cursor will be at the description field. Press F7 to display screen #2 with order items listed.

c) Ensure that all items listed have actually arrived at the dealership.

d) To backorder an item(s), enter the make of the backordered item and F9 at the "model" field. Select "Order items".



e) Choose the backordered item from the list displayed and then press F9. The system will prompt you to enter the quantity backordered. Press ENTER, the order item is adjusted to show quantity received and backordered.



f) Once all backordered items have been indicated, press ESC and select Quit. Screen #1 is again displayed.

g) Select F9 to serialize the items you received. The system will prompt you for each model, and ask if you are ready to post the numbers.

h) Once serialization is complete, you may press F5 for print options.

i) To receive the items into POS Linker's inventory file select F7, this will take you back to the second screen, press ESC.

j) At this point, you may "Receive order". Choose "All goods" or if backordered items exist, choose "Goods shipped". The system will update your inventory on hand, and issue tag numbers for each item.

To receive Backordered items:

At the order processing screen, enter the distributor code and purchase order number if known. You may also press F7 for a complete listing of purchase orders. Once your order is displayed; enter through to the second order processing screen. Enter the make of the backordered item you wish to receive. Press F7 at "Model" and select "Order items". Choose the correct order item. You will notice that the "Qty" field indicates "0", and the "Backorder Qty" field indicates the number of that item on backorder status.

You must now UNbackorder the item(s) before receiving them by pressing F9. If there is a quantity greater than one (1), pressing F9 will prompt you to indicate the number you wish to UNbackorder. If there is only a quantity of one (1) on this item, pressing F9 will simply toggle the "Qty" and "Backorder qty" fields to reflect appropriately.

Once you have UNbackordered the selected items you may serialize and receive them as usual.

Reports:

The reports menu will give you more comprehensive and detailed listings by tag number, manufacturer, customer or layaway. These can be modified to be as specific or as general as possible by using the parameters on the bottom of the screen.

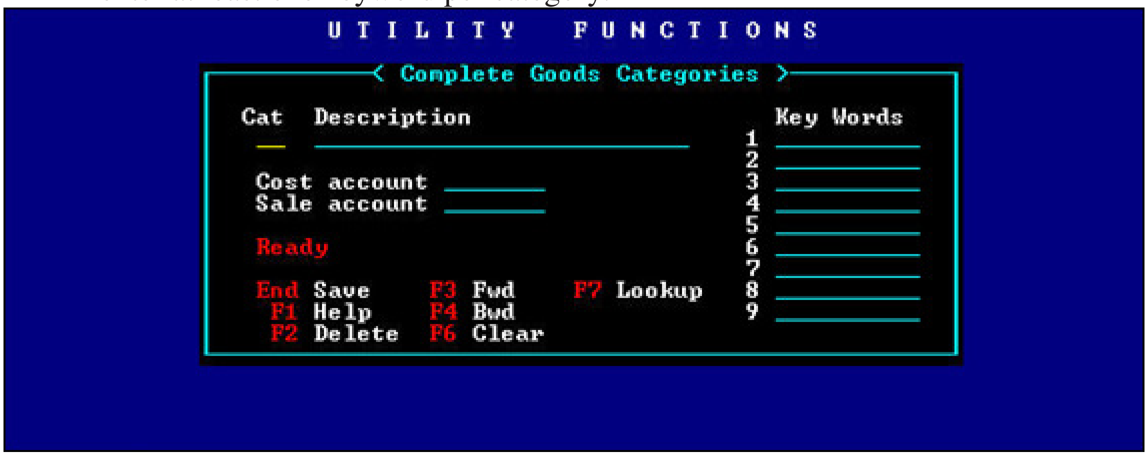
1. **Inventory listing by Manuf.**: displays either by tag number or by manufacturer & make all complete goods in stock.
2. **Owner listing by Manuf.:** displays either by tag number or by manufacturer & make, all complete goods sold including customer information.
3. **Owner listing by customer**: displays list by customer, either numerically or alphabetically, with all complete goods purchased by that customer. You may refine the report by entering specific parameters (ex: specific manufacturer or specific dates, etc)
4. **Inventory labels**: labels printed with either the complete good tag number and dealer name (Barcode off), or a barcode representing the tag number (Barcode on).
5. **Layaway listing by Manuf**: displays customer name and any complete good item they have on layaway.
6. **Transfer listing by Manuf:** displays all complete goods transferred and the dealership to which they were transferred.

Locator:

The Locator option is designed to help you find complete goods and attachments. You may want to transfer an attachment from one complete good to another, and want to know where to find it. F7 will give a full listing of all items, or you may enter the specific manufacturer and item number to narrow the listing.

Utility Menu

Update categories: allows the user to setup categories defining complete goods especially for reporting purposes. Ex: TR = tractors, MW = mowers, etc. The user must enter at least one keyword per category.



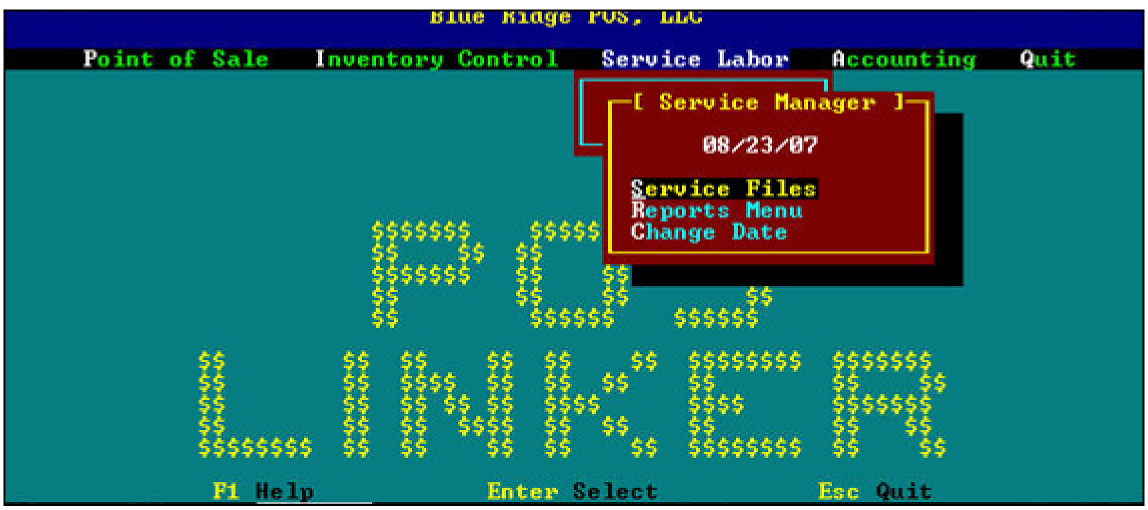
Setup rental rates: allows the user to install rental rates of equipment for rent. This only applies if the Rental Module is installed.

Change Date

This allows the user to change the date (usually back) for reporting purposes, purchase order dating, etc.

7. Service Labor

In the above example of the POS LINKER Main Menu Screen, the highlight bar is on Service Labor and the corresponding subtopic - Shop Control.



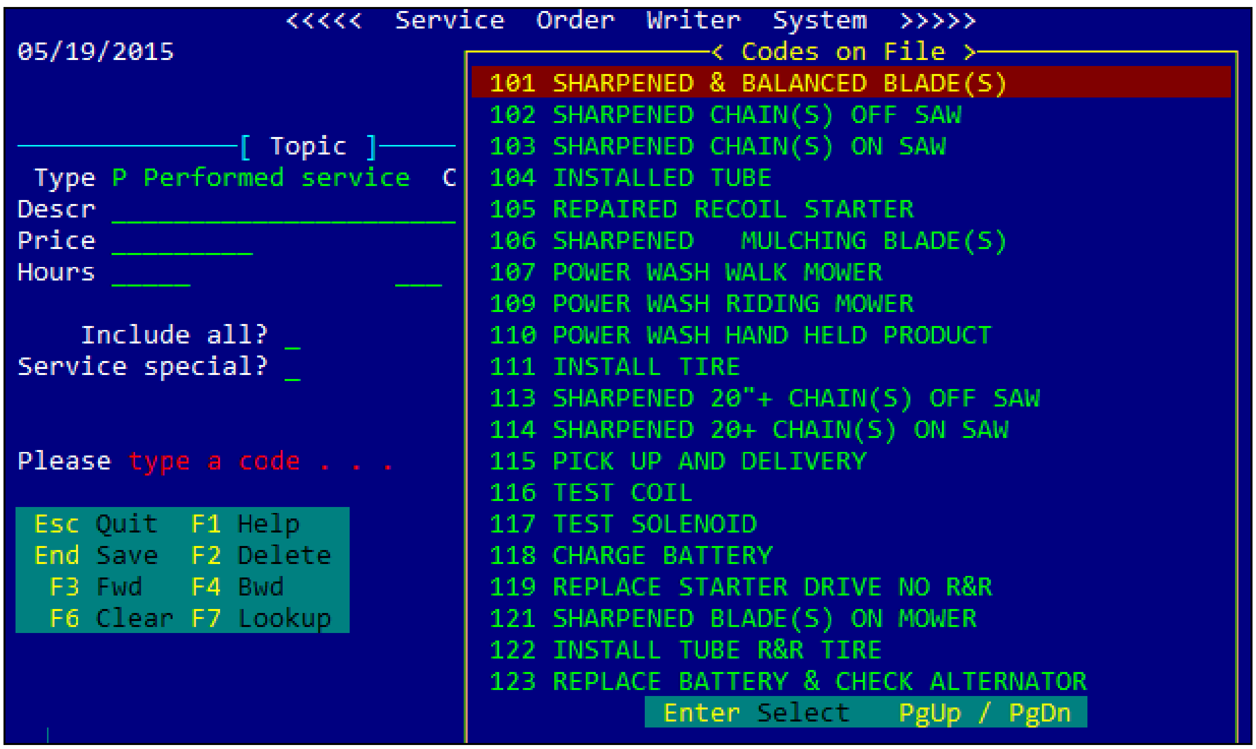
When Shop Control is selected from Service Labor, the Service Manager Selection Screen appears.

Service Code File

This selection allows the user to setup time-saving codes to be entered on repair tickets for service work. Enter as complete a description as possible for each, as well as the number of hours to complete the task and the price. Codes can be created for the following categories:

- **S** - symptom reported
- **R** - requested work
- **P** - performed work

When entering information on the service order screen the user may press F7 to display the code list for assistance. See the following sample screen.

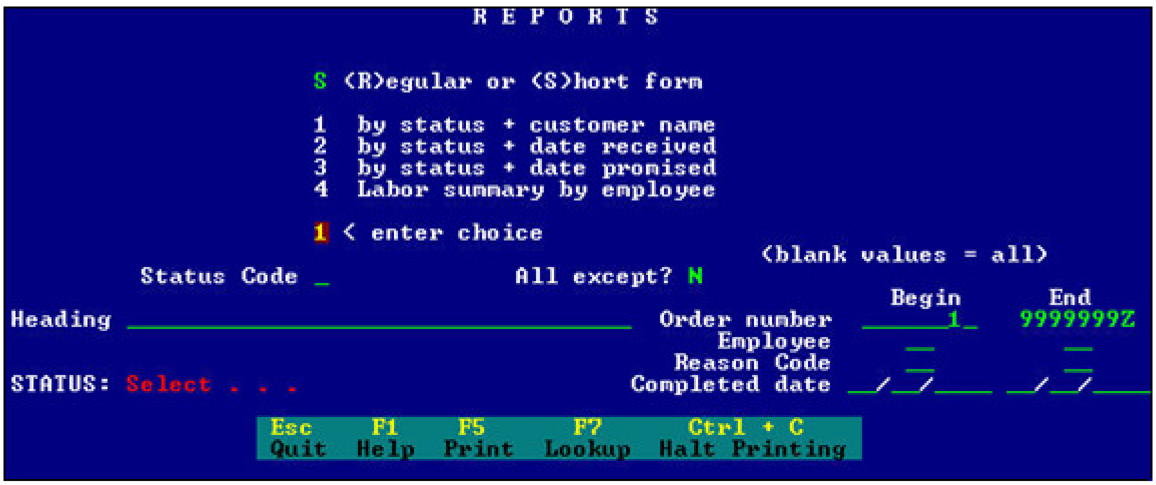


Service Order reports will give a listing of service orders by status and either customer name, date received, or date promised. This report is useful in monitoring how long work orders have been in the system.

<u>Status selections</u>:

- R Ready
- H on Hold
- P in Progress
- S Scheduled
- C Closed

Select Y in the “All except”? Field to print all but Closed service orders

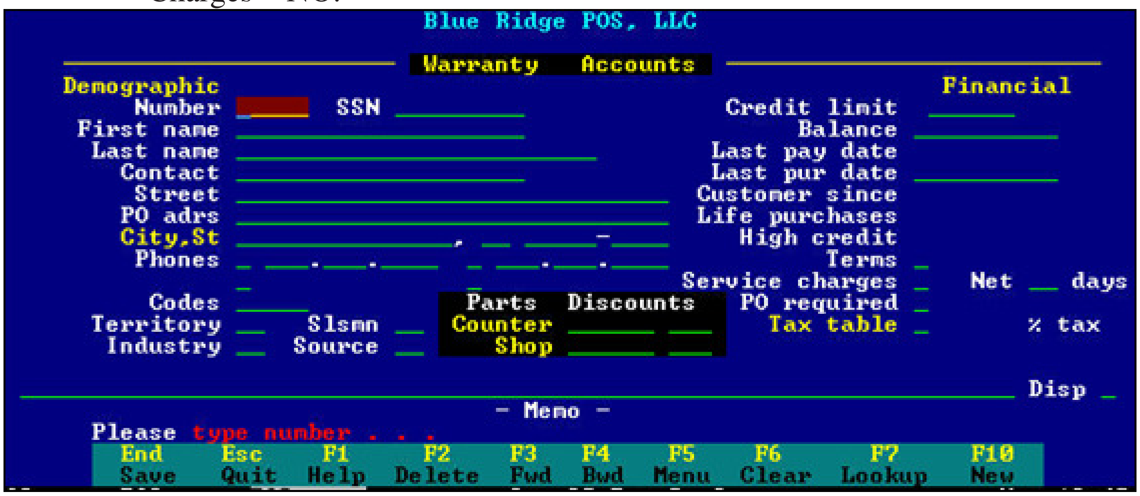


Warranty Accounts:

Many service orders are completed through manufacturer warranties. POS Linker allows you to set up warranty accounts to better track your receivables and service orders. This feature is only available if you license the service order module.

Setting Up Warranty Accounts:

a) The Warranty Accounts screen appears similar to the customer file screen - setup account information, name, address, etc. Terms = Invoice, and Service Charges = NO.



b) Under the POS menu, choose POS Setup. Select Forms/GL Linkage.

c) On the right hand side of the screen, under "General Ledger Accounts", indicate the GL account for which your Warranty Receivables will be posted - hit  to save.

Processing Service Orders Under Warranty:

a) Under POS menu - select Invoicing, enter operator initials.

b) Choose Lookup/Install Customer - lookup customer information or enter customer number.

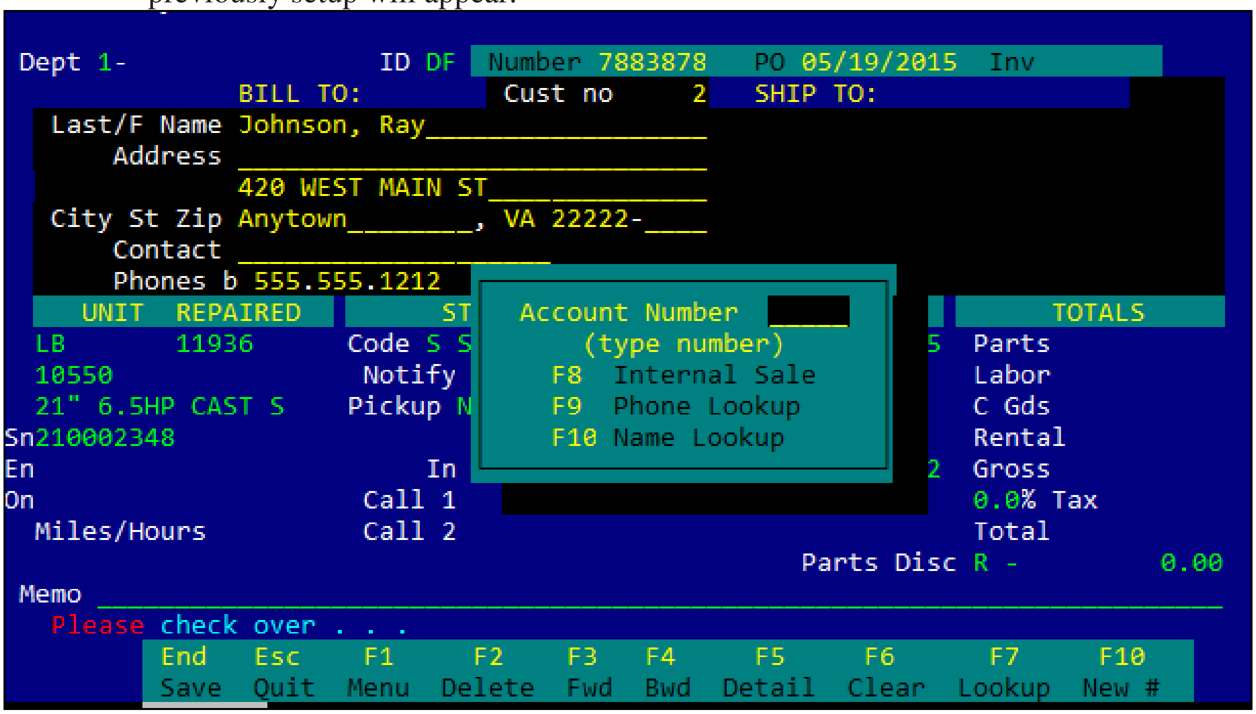
c) Menu selection appears - select Service Orders, Service Order screen appears with customer information.

d) Enter the Order Number, or hit F10 for the system to assign a new number.

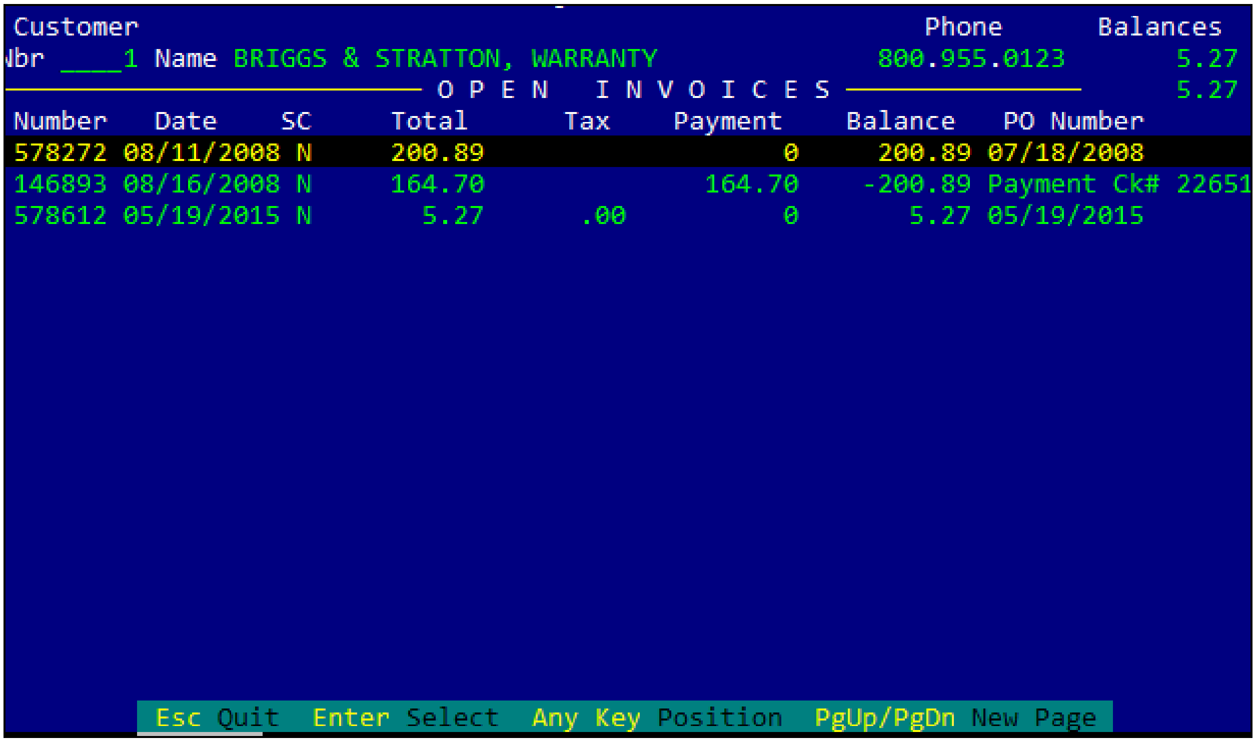
e) Enter PO# if one is used.

f) At Last/F Name, select F7 and choose Change Customer - you will now have another lookup screen.

g) Select F8 - Internal Sale, then select Warranty. A list of Warranty Accounts you previously setup will appear.



Highlight/select the warranty company the service order is being run under. The customer information will now include the warranty company's name and address.



1245

h) Process your service order as normal.

Invoices run through the warranty accounts will post to the Warranty Receivables account you selected for your GL linkage (if one) and to the Warranty Account itself. You can review the invoices on the overview screen of each Warranty Account.

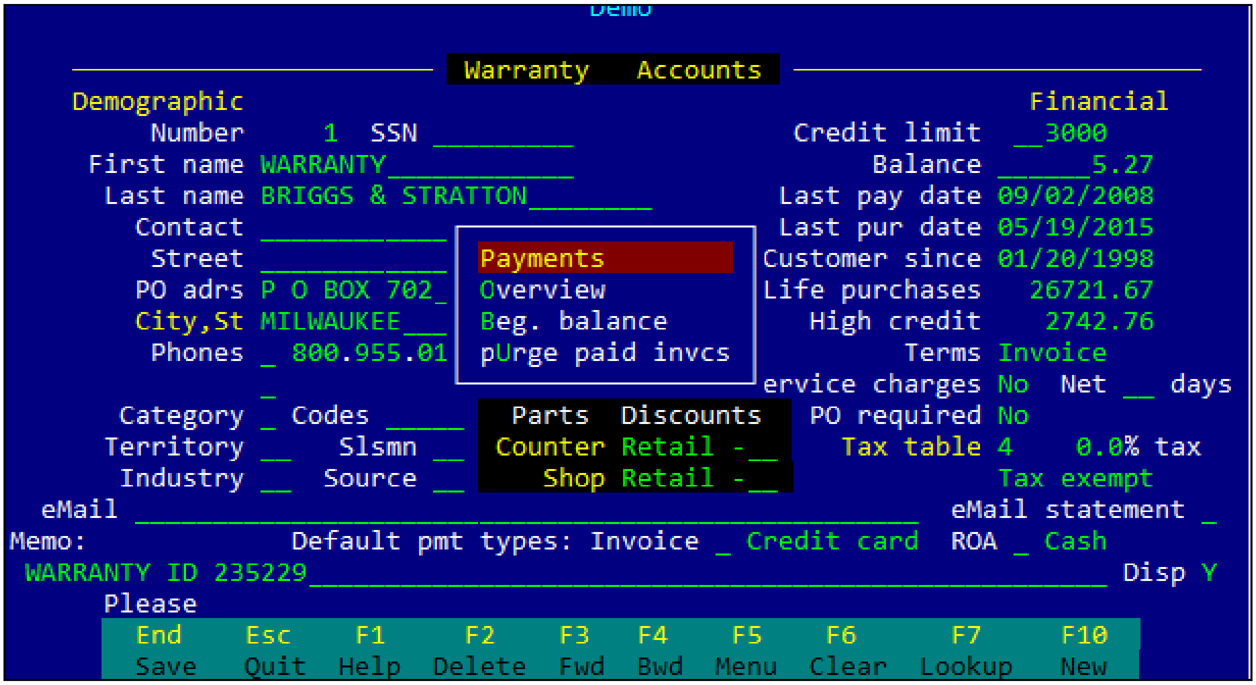
Receiving payments on Warranty Account

a) Select Warranty Accounts menu selection under Service Labor.

b) Enter customer account number or F7 to lookup.

c) Select F5 for menu.

d) Enter “P” or highlight “Payments”, payment screen will appear.

e) 
Demo
Warranty Accounts
Demographic
Financial
Number 1 SSN
First name WARRANTY
Last name BRIGGS & STRATTON
Contact
Street
PO adrs P O BOX 702
City,St MILWAUKEE
Phones 800.955.01
Payments
Overview
Beg. balance
pUrge paid invcs
Credit limit 3000
Balance 5.27
Last pay date 09/02/2008
Last pur date 05/19/2015
Customer since 01/20/1998
Life purchases 26721.67
High credit 2742.76
Terms Invoice
ervice charges No Net days
Category Codes
Territory Slsmn
Industry Source
Parts Discounts
Counter Retail -
Shop Retail -
PO required No
Tax table 4 0.0% tax
Tax exempt
eMail
eMail statement
Memo: Default pmt types: Invoice Credit card ROA Cash
WARRANTY ID 235229
Disp Y
Please
End Esc F1 F2 F3 F4 F5 F6 F7 F10
Save Quit Help Delete Fwd Bwd Menu Clear Lookup New

f) System will default to current date, you must use the "Change Date" option in the Accounts Receivable sub-menu, to alter the date if you wish to post another date.

g) Enter reference information ex: Check #

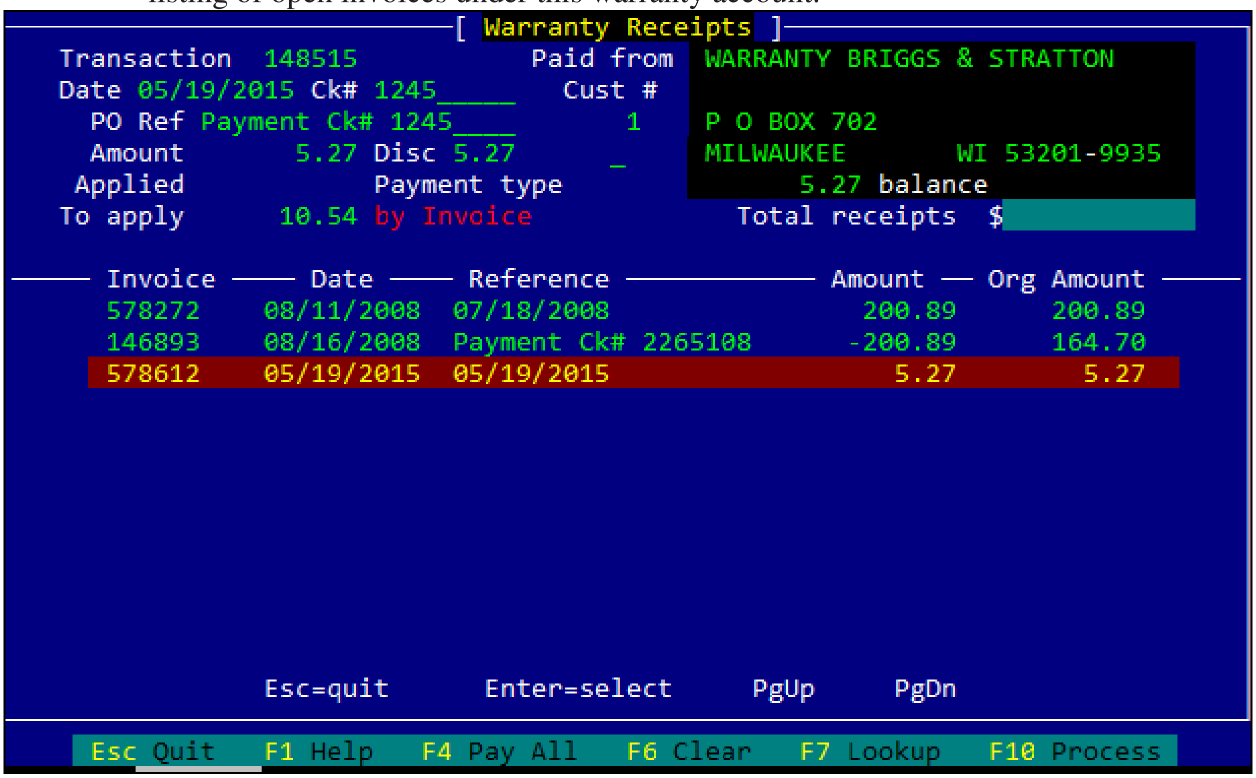
h) Enter payment & discount amounts - the system will default to the account balance as the payment amount. Your payment amount is **ALWAYS** going to be the amount of the check/credit in your hand. If the invoice amount is different than the check/credit amount, the difference is the discount amount. *For example*:

a) **Invoice: $100.00 Check: $95.00 Discount would be $ 5.00**

or

b) **Invoice: $100.00 Check: $105.00 Discount would be $-5.00**

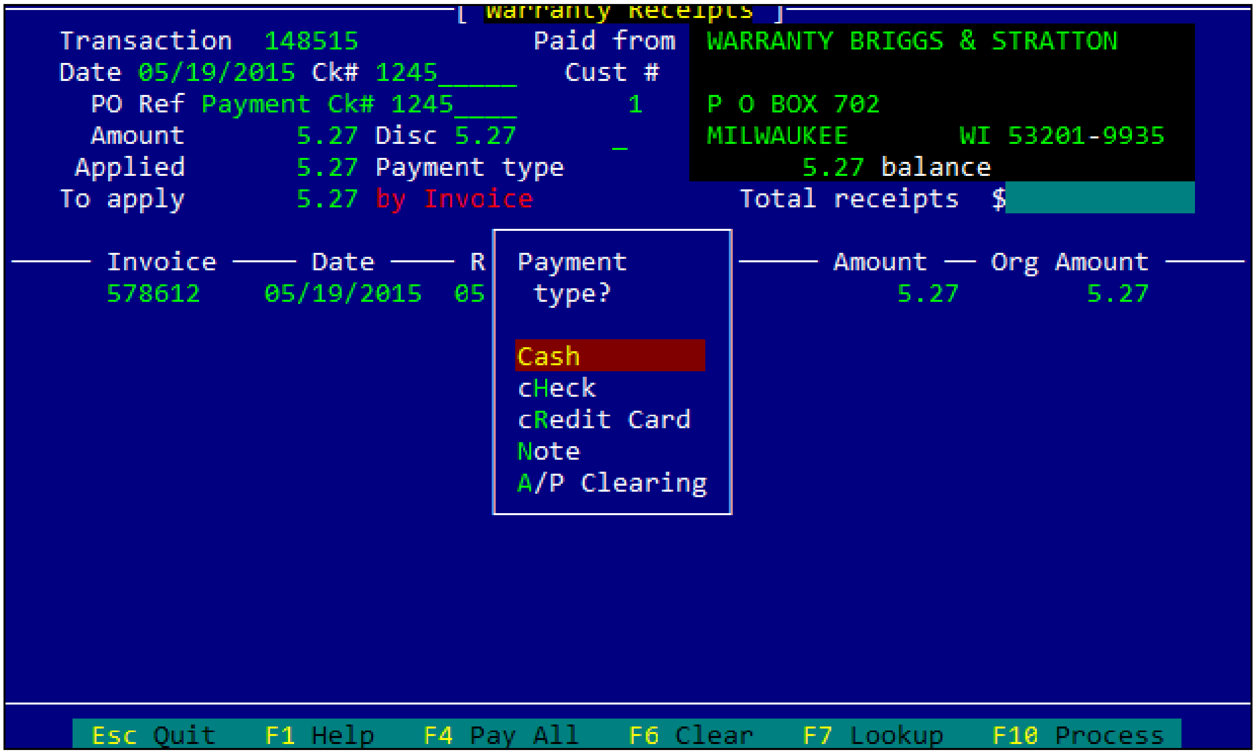
i) Enter through to pop-up menu, choose “Lookup Invoices” - this will display a listing of open invoices under this warranty account.



j) Use arrow keys to select the invoice or invoices you wish to pay. Making sure that the amount of invoices matches the amount of the payment. You may verify this in the upper portion of the screen in the "Applied" field.

k) Enter through to pop-up screen, or press F10 and choose “Process Payment” - select payment type:

- **Cash**
- **Check**
- **Credit Card**
- **Note** - Customer is paying off account with finance note (very seldom used)
- **A/P Clearing**



Once payment type is selected, the system will ask if you are ready to post the payment. Answer "yes" if everything looks correct.

Using POS Linker as a Time Clock

1. Setup your POS Linker system to use it as a time clock for payroll:

A. Start at the "black screen menu" with "Multiuser Business Solutions" in yellow print

- ENTER 2 times (POS Setup)
- Internal Departments
- ESC
- Type "TIME"
- Type "*Time Sheet - Internal"
- Type N under Tax
- Type a GL Account if you are using the POS Linker General Ledger
- END to save

B. Setup employees for time clock.

Note: Each employee that will use the time clock for payroll should be added into the system in a unique way from how you bill labor for them.

- Start at the "black screen menu" with "Multiuser Business Solutions" in Yellow print
- ENTER 2 times
- POS Setup
- Employee File
- Initials
- Name
- END to save

C. Setup SO calendar assignments

- Start at the "black screen menu" with "Multiuser Business Solutions" in Yellow print
- ENTER 2 times
- Service Labor
- Shop Control
- Service Files
- F9 Service Codes
- F7
- Hold Reason
- ENTER
- A + <First Initial> <Last Initial> + "Assigned"
- ENTER

2. Set up a new SO (Service Order) for a pay week or pay period:

- Start at the "black screen menu" with "Multiuser Business Solutions" in Yellow print
- ENTER 3 times
- Type your initials
- Select "Service Orders"
- Press F10 for a new SO number
- ENTER
- T
- ENTER
- F7
- Change Customer...
- F8 (Internal)
- 0
- ↓ - Arrow down to "TIME" for Sheet
- ENTER
- F1
- Unit Info
- ENTER 4 times
- Enter SO# including the T (1332T)
- ENTER 4 times
- P "In Progress"
- F7 to add to SO calendar an assignment of responsibility
- ENTER 6 times
- Enter first day of payroll week or period in the "Order Started On" field
- Estimated or Promised for: Use date that you want the SO to display on the Service Calendar & Service Order Report by Promise Date for completion

Note: Date fields shortcuts + 8 in this field will add 8 days to today's date. F7 will type in today's date.

- Order Finished On: Use date which is the last day of your payroll week or period
- ENTER 5 times
- F5 to save

3. Prepare for next payroll period and close the previous one.

NOTE: At or near the end of your payroll period, you will start a new "T" Service Order. After everyone has punched off the clock for the last pay period day, change the old "T" SO status to "D" status.

- Start at the "black screen menu" with "Multiuser Business Solutions" in Yellow print
- ENTER 3 times
- Type your initials
- Select "Service Orders"
- F7
- *
- ENTER 2 times
- I (In Progress)
- Select the time SO you want to change
- ENTER 4 times
- F5
- F1
- Mgmt Review
- Type password if you have one or continue...
- ENTER
- F1
- Change Status
- D

To review time punches for accuracy, run the SO report described below on another channel first and then come back to this channel to review. After making any necessary adjustments, Close the SO.

- ESC
- **
- Type Date, initials + "Reviewed" (i.e. 1.17.06 jpb Reviewed)
- END
- Process Only

4. Run the payroll period end report to obtain accumulated time clock punches.

- Start at the "black screen menu" with "Multiuser Business Solutions" in Yellow print
- ENTER 2 times
- Shop Control
- Reports Menu
- 4
- D (or current status of SO that you want to see)
- N
- ENTER 3 times
- Range of initials that you want the report for
- F7
- Type correct date for the SO payroll period
- F5
- Completed Date
- Choose "Screen" or the printer you want

8. Accounting

In the above POS LINKER Main Menu Screen, the highlight bar is on Accounts Receivable.

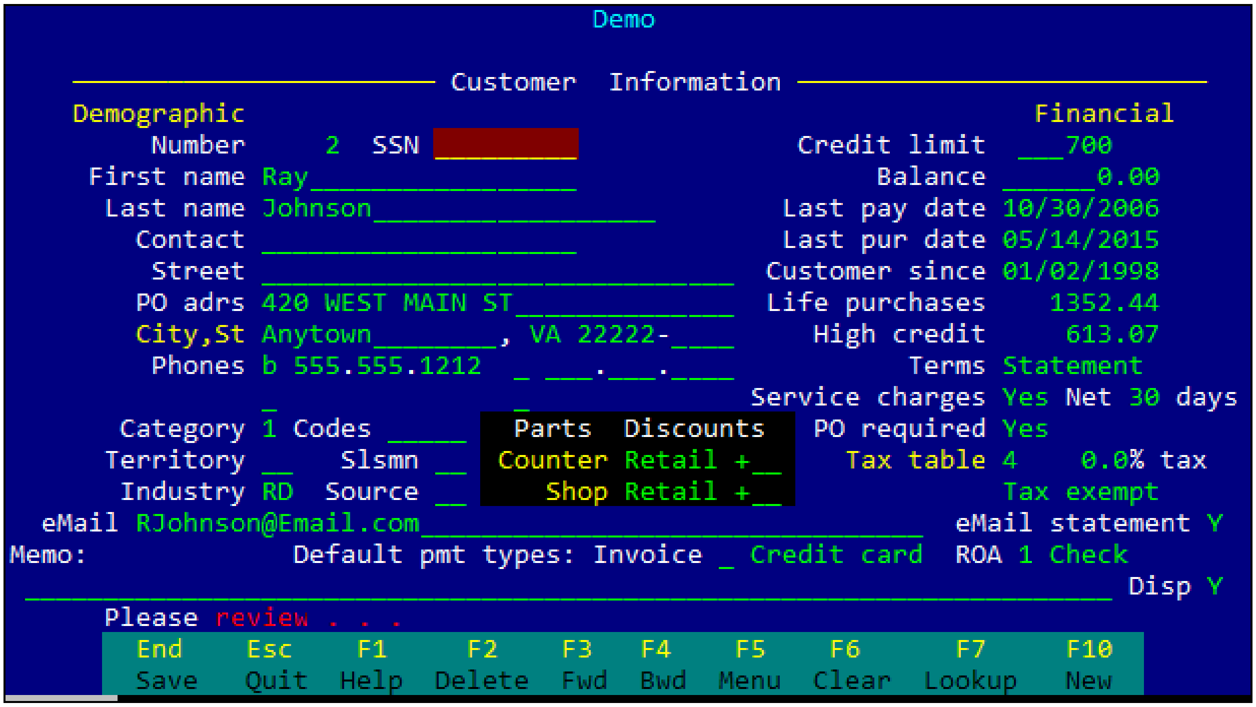
Accounts Receivable

If Accounts Receivable is selected from Accounting, the Accounts Receivable Selection Screen appears. Several choices can be made from the subtopics as follows:

- Customer File
- Reports
- Balance Files
- Service Charges
- Mail System
- Period Change
- Date Change

Whenever one of the above subtopics is selected, the appropriate data entry screen appears, as well as it's corresponding F1 Help screens and special function keys.

Customer File Information



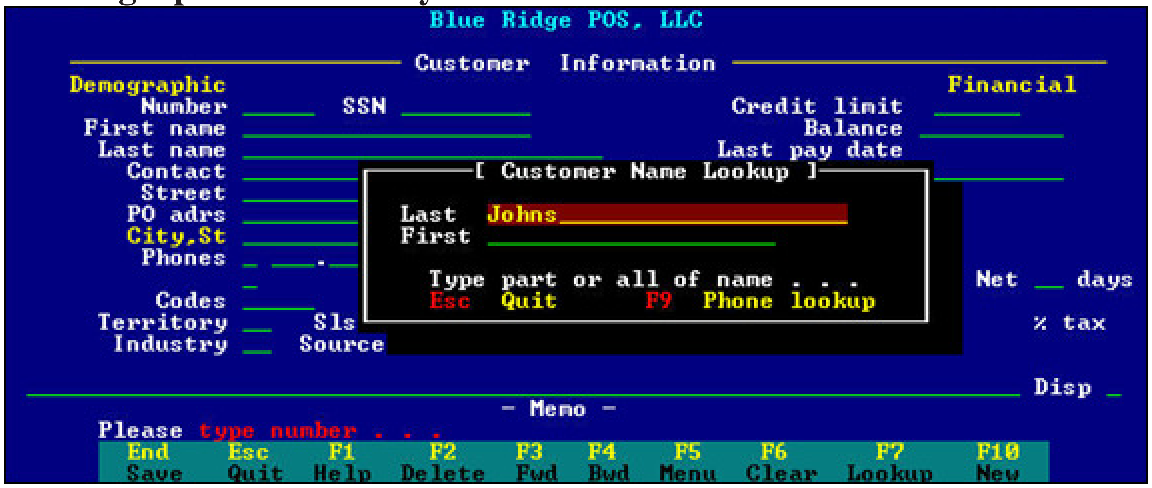
Selection of Customer File on the Accounts Receivable Selection Menu brings up the Customer Information and Data Input Screen. Pressing F1 Help provides five Customer Data Entry Help Screens which give appropriate information for data entry onto the Customer Information Screen. The following is covered:

Data Entry by Number:

a) Type a customer number. If the customer is on file, then the current data on that customer may be changed. If no customer data is displayed, then a new customer may be entered by pressing F10. The program will automatically assign customer numbers by adding 1 to the highest number currently used. If the customer number is not known, a lookup may be performed on the customer's name.

b) After entering or changing the data, press END to save it.

Looking Up a Customer by Name:



a) Press F6 to clear screen if necessary

b) Press F7 (Lookup).

c) Type as few characters as necessary in “Last” to find customer. Press ENTER twice.

d) Follow the help displayed at the window bottom to select or quit.

e) You may also press F9 for customer lookup by phone number.

Deleting a customer:

Display the customer on the screen using the customer number, phone number, or name. When the correct customer to delete is displayed, press F2. A verification menu will confirm the erasure.

Starting over:

F6 clears all fields on the screen to start over and releases customer displayed to other users.

Browsing:

F3 will move forward one customer and F4 moves backwards.

New number:

F10 displays a new customer number.

City, State, and Area Code referencing:

Pressing F7 at the "city" field will allow you to enter a zip code. If zip code exists, information for the city, state, and telephone area code will be displayed.

Some of the field items on the Customer Information screen should be paid SPECIAL ATTENTION. Such as:

Credit Limit:

A credit limit must be set to establish a charge customer. If this field is left blank, the customer's pay options will be either cash or credit card.

Terms:

You must indicate whether this customer will pay by invoice or by monthly statement.

- S= Statements
- I=Invoices

If you set a customer as pay by Invoice, it is best to receive account payments through the Accounts Receivable payment screen from the Customer file and apply the payment to specific invoices.

Service Charges:

Should monthly service charge be applied for this customer?
Yes or No

Codes:

This can be any character to code a certain set of customers. This is helpful in running specialized reports.

Parts Discounts-Counter and Shop:

This allows you to set special pricing levels for each customer, whether it is cost, list, retail or level. Most customers are set at retail. The next field allows you to add or subtract a percentage rate factor to the chosen price method.

Tax Table:
These are established at system installation. You must indicate each customer's tax liability. Pressing F7 at this field will display the tax table set at system installation.

Industry and Source codes:
These codes are also user defined to flag certain customers for custom reports.

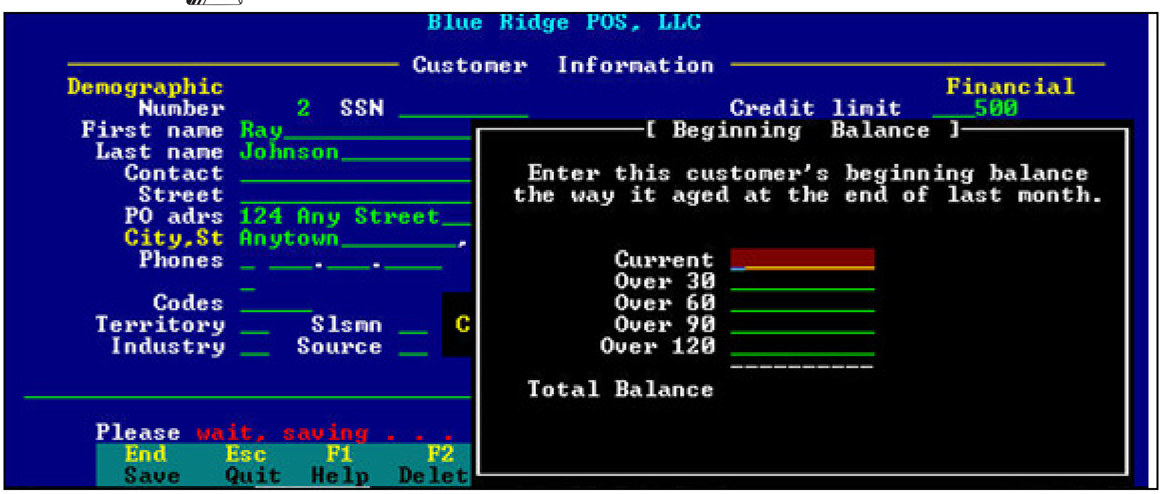
F5 - Customer File Menu Options

Beginning Balance:
Installing an established customer:

a) Enter all customer information, except customer balance. When all fields are complete, hit END to save.

b) Re-display customer screen.

c) Select F5 for menu options, choose Beg. Balance.

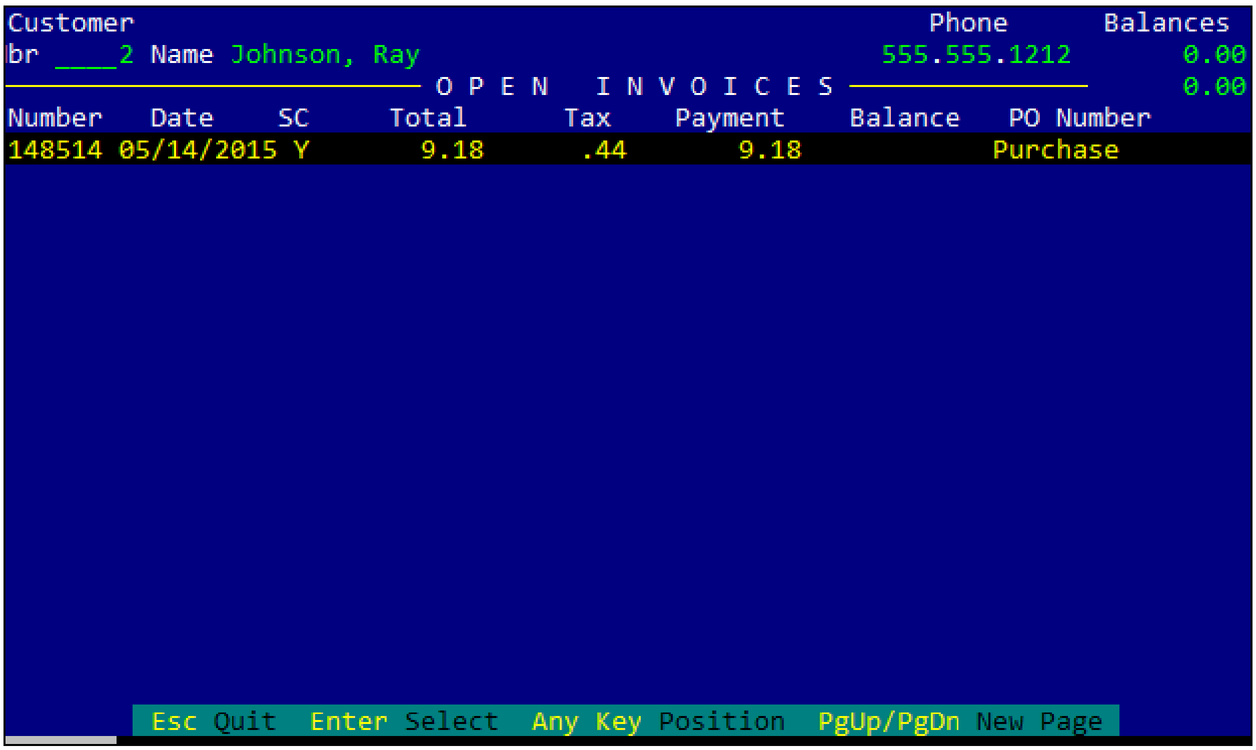


d) Enter customer's current and past due information. This will establish pay history for monthly statements.

Overview:

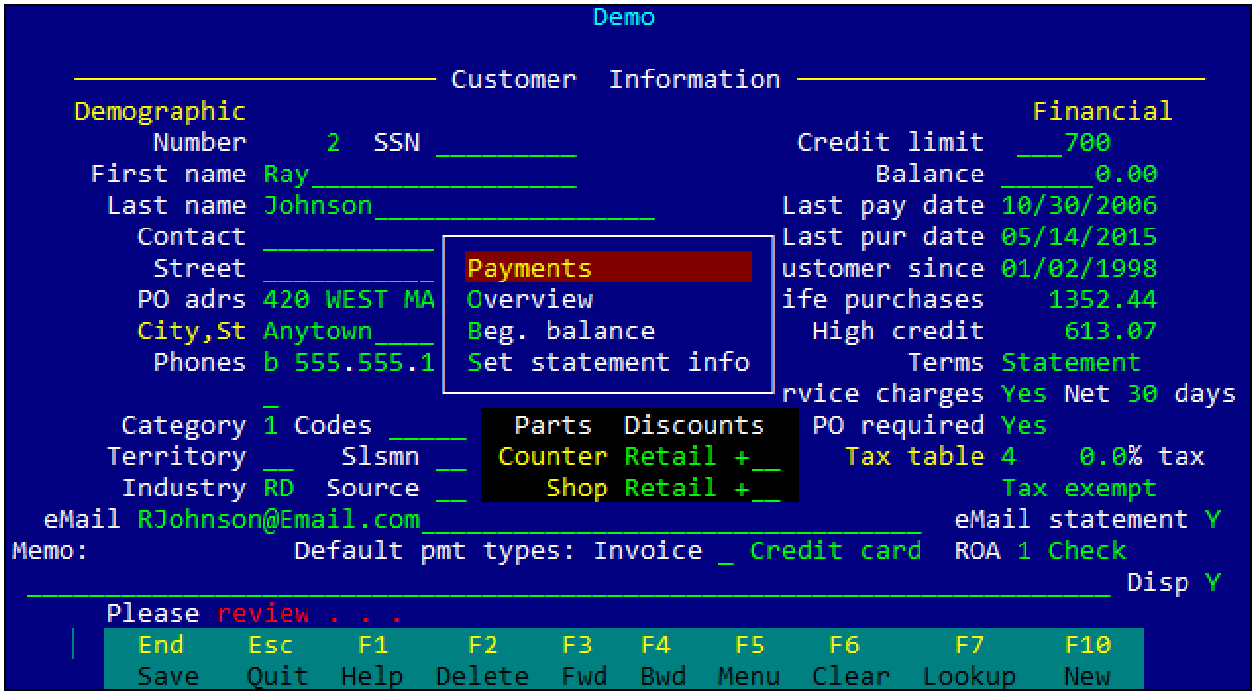
F5 provides two other options for customer information. The Overview screen provides a detailed list of invoices charged and payments received on the customer's account. You may view or edit any of the transactions by highlighting the item and pressing ENTER. The overview screen is often used to correct customer balances. However, always be careful when making adjustments. We strongly suggest that you not make any changes without consulting your local distributor or Blue Ridge POS, LLC.

In the top right hand corner of the Overview screen, there are two balances. The top figure is the customer's receivable balance from the first screen. The bottom figure is the balance of the outstanding transactions. These two balances should ALWAYS match.



Payments:

Payments received on customer accounts can be optionally applied to individual invoices with this selection.

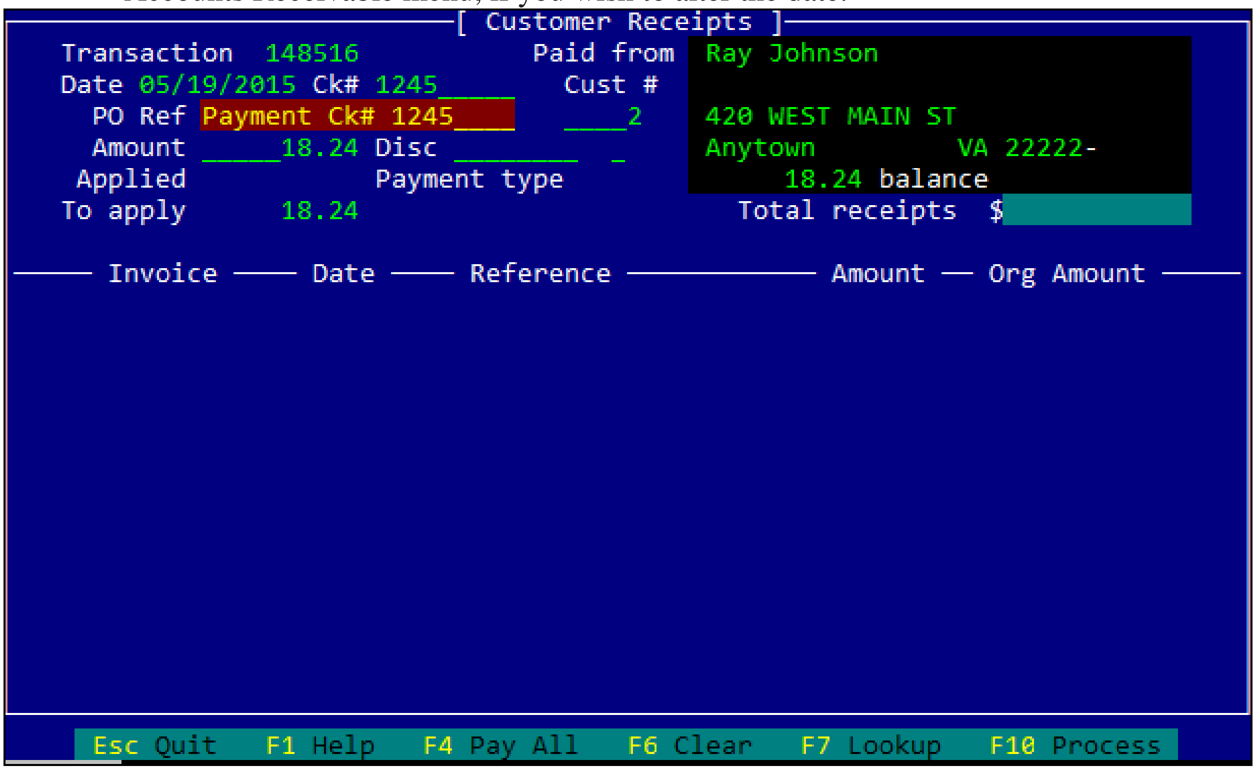

Demo
Customer Information
Demographic
Financial
Number 2 SSN
Credit limit 700
First name Ray
Balance 0.00
Last name Johnson
Last pay date 10/30/2006
Contact
Last pur date 05/14/2015
Street
Payments
ustomer since 01/02/1998
PO adrs 420 WEST MA
Overview
ife purchases 1352.44
City,St Anytown
Beg. balance
High credit 613.07
Phones b 555.555.1
Set statement info
Terms Statement
rvice charges Yes Net 30 days
Category 1 Codes
Parts Discounts
PO required Yes
Territory Slsmn
Counter Retail +
Tax table 4 0.0% tax
Industry RD Source
Shop Retail +
Tax exempt
eMail RJohnson@Email.com
eMail statement Y
Memo:
Default pmt types: Invoice _ Credit card
ROA 1 Check
Disp Y
Please review . . .
End Save
Esc Quit
F1 Help
F2 Delete
F3 Fwd
F4 Bwd
F5 Menu
F6 Clear
F7 Lookup
F10 New

Processing/Receiving Payments on Account:

a) Enter customer account number or F7 to lookup.

b) Select F5 for menu - Enter P or highlight "Payments", payment screen will appear.

c) System will default to current date, you must use the "Change Date" option on the Accounts Receivable menu, if you wish to alter the date.

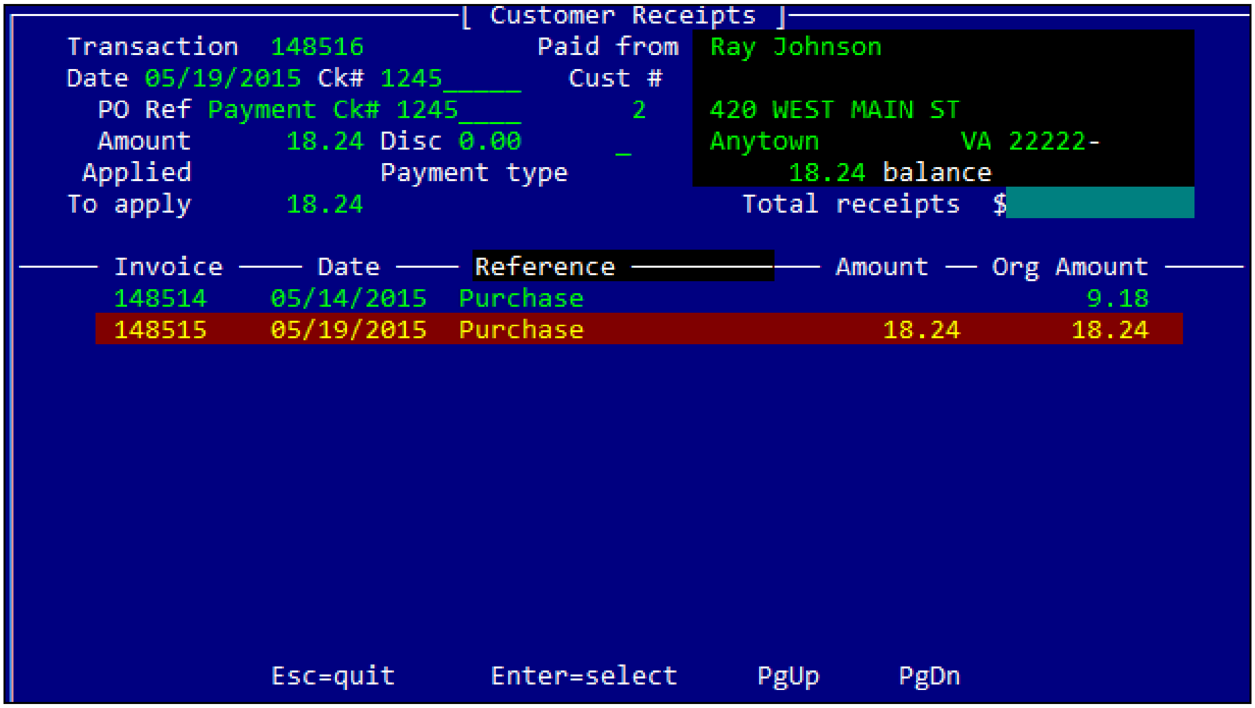


d) Enter reference information ex: Check #.

e) Enter payment amount - the system will default to the account balance as the payment amount. Your payment amount is ALWAYS going to be the amount of the check in your hand. If the invoice amount is different than the check amount, the difference will either result in a remaining balance on that invoice, or a credit amount which can be applied to another invoice.

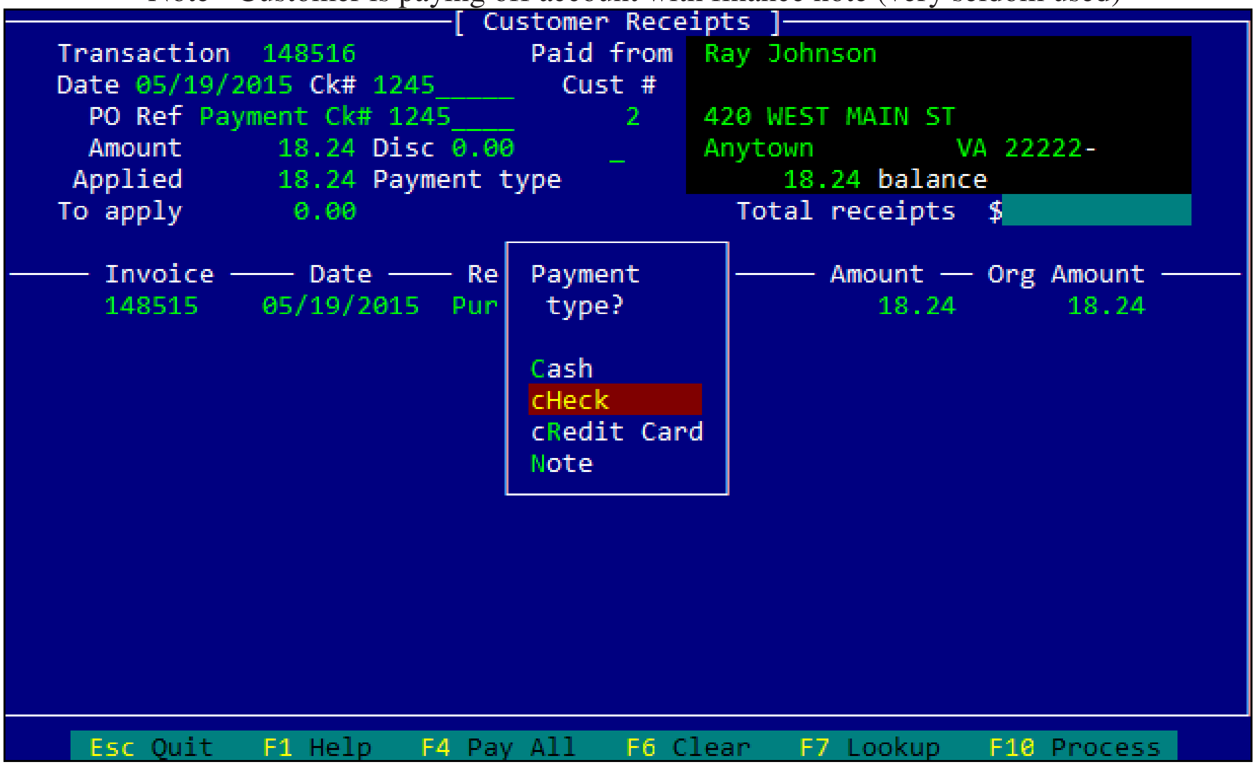
f) Enter through to pop-up menu, choose "Lookup Invoices" - this will bring up listing of open invoices under this customer's account.

g) Use arrow keys to select the invoice or invoices you wish to pay.

h) 
[Customer Receipts]
Transaction 148516
Paid from Ray Johnson
Date 05/19/2015 Ck# 1245_____
Cust #
PO Ref Payment Ck# 1245____
2
420 WEST MAIN ST
Amount 18.24 Disc 0.00
Anytown VA 22222-
Applied
Payment type
18.24 balance
To apply 18.24
Total receipts $
Invoice
Date
Reference
Amount
Org Amount
148514 05/14/2015 Purchase 9.18
148515 05/19/2015 Purchase 18.24 18.24
Esc=quit
Enter=select
PgUp
PgDn

Enter through to pop-up screen or press F10, choose “Process Payment” - select payment type:

- Cash
- Check
- Credit Card
- Note - Customer is paying off account with finance note (very seldom used)

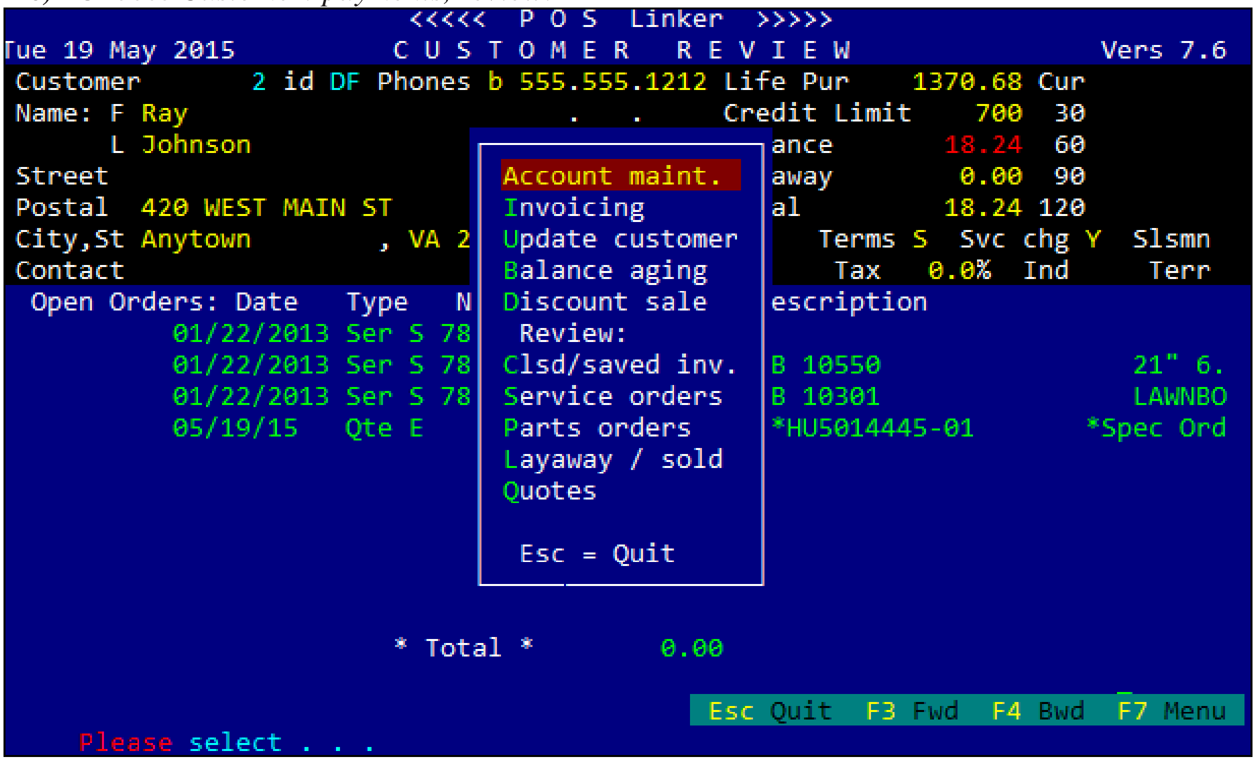


i) Once payment type is selected, the system will ask if you are ready to post the payment. Answer “yes” if everything looks correct.

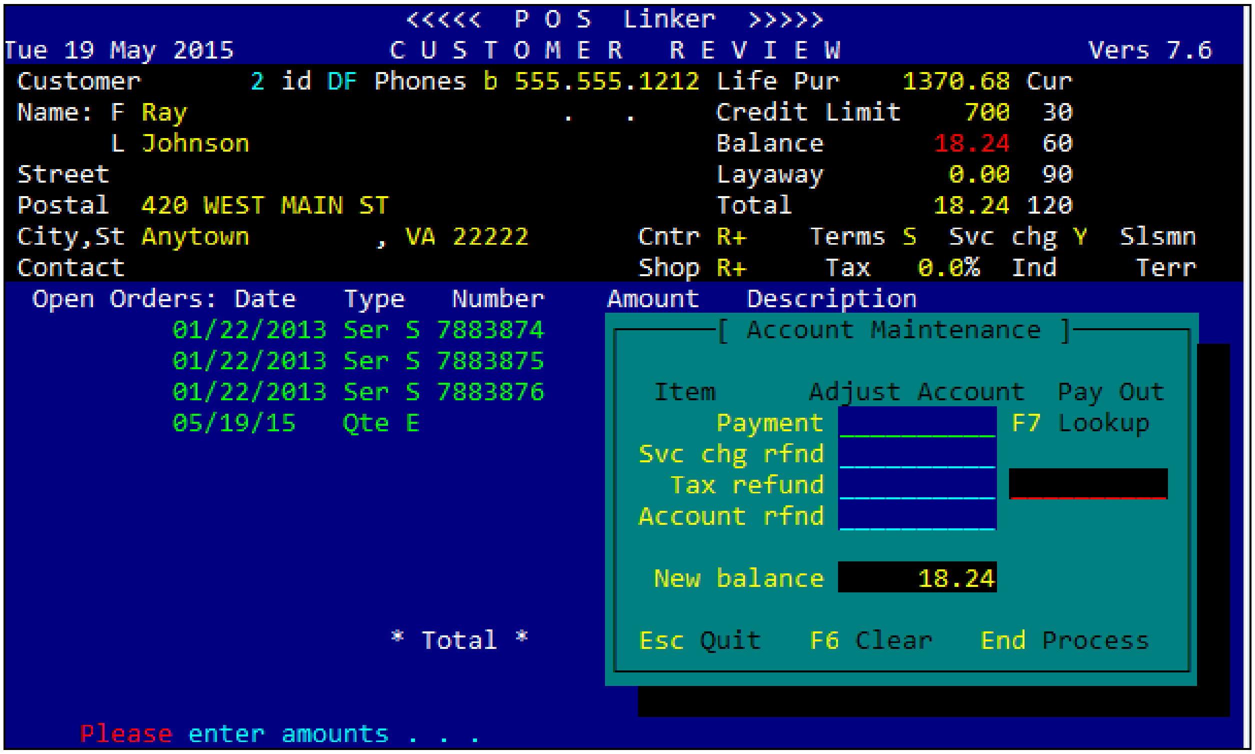
To correct payments on account

If a payment was incorrectly applied to the wrong account or the wrong amount was applied to the correct account, you may correct the problem through the Customer review screen.

a) Under POS menu, choose *Invoicing*.
b) Lookup customer, or enter customer #.
c) Choose *Customer: payments, review*.



d) Choose *Account Maintenance.*
e) In Account Refund section on the Account Maintenance screen, enter the amount
f)
g) of the incorrect payment. Process the refund exactly the same as the original payment was taken, whether by check or cash, etc. This will correct your cash drawer for the day. You should do the refund before you apply another payment.



h) You can now go back to the Payment screen on the Customer File, and enter the payment correctly.

i) Now you may wish to “clean-up” the customer’s overview screen so that their statements show the payment received, and not the account corrections you just made.

j) You will need to delete both the original incorrect transaction, and the payment refund from the overview screen, by highlighting and selecting F2 to delete.

Your top balance on the overview screen should be correct, so you want to answer “No” to the adjust balance question each time you delete an invoice.

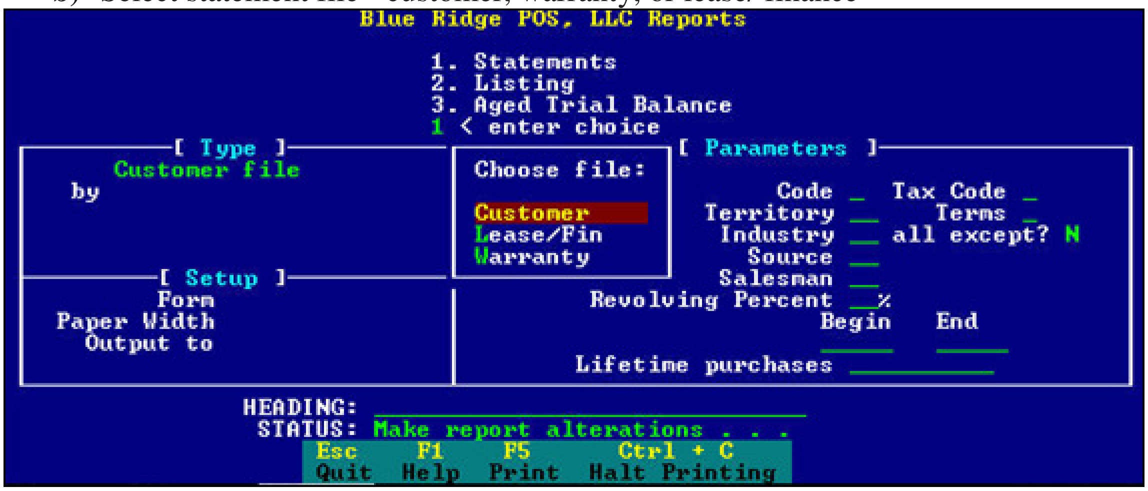
*****Please use caution when performing this procedure. Make certain you are choosing the correct invoices. Call your distributor or Blue Ridge POS if you need assistance.***

Reports - Accounts Receivable

1. Statements - you may select all customers, warranty accounts, or lease/ finance accounts. Several month-end steps should be completed **before** printing customer statements. To generate statements:

a) Select 1 at prompt

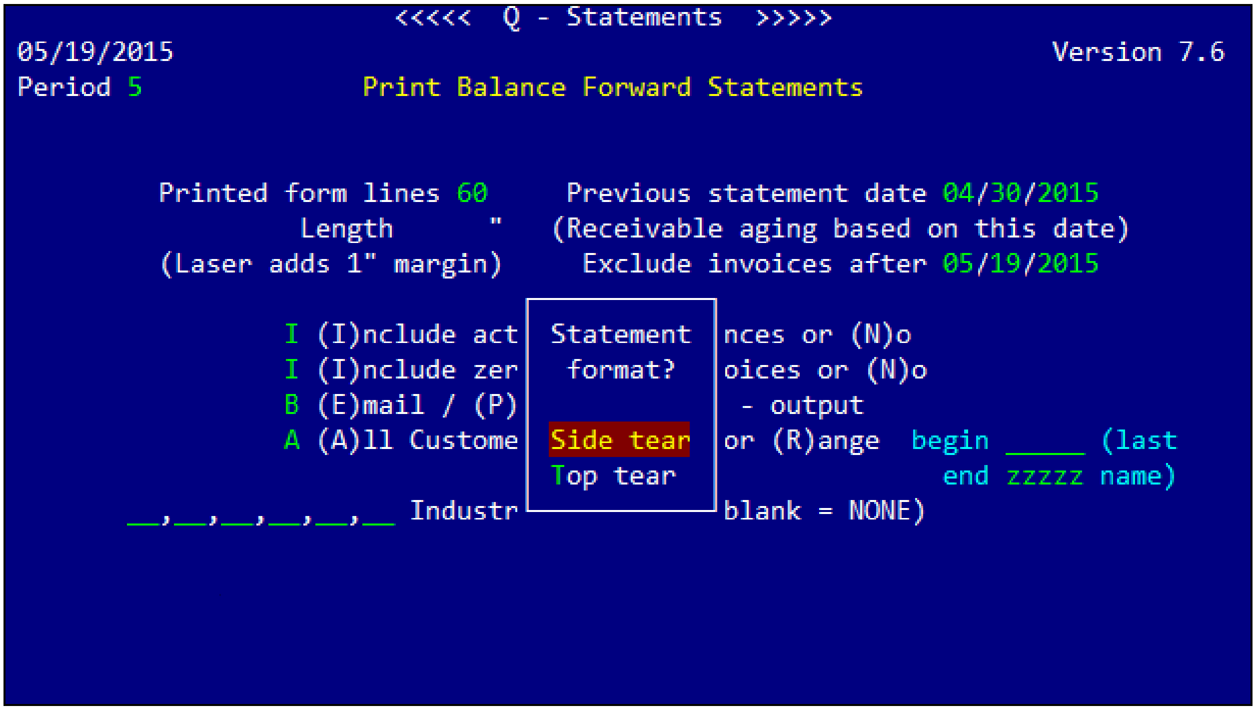
b) Select statement file - customer, warranty, or lease/ finance



c) Select statement type - *Balance forward* for preprinted forms, or *Open Invoice* for plain forms

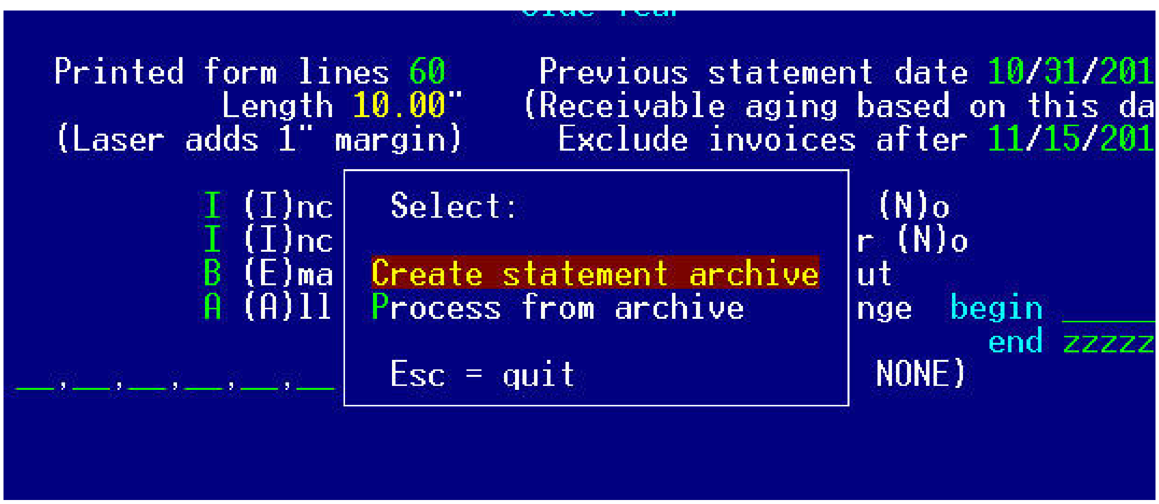
d) Check previous statement date and make other selections. Enter any industry codes for customers you would like the statements to **skip**. (Ex: L = Layaway, BD = Bad Debt)

e) F3 will assist in aligning forms, F5 to begin printing.



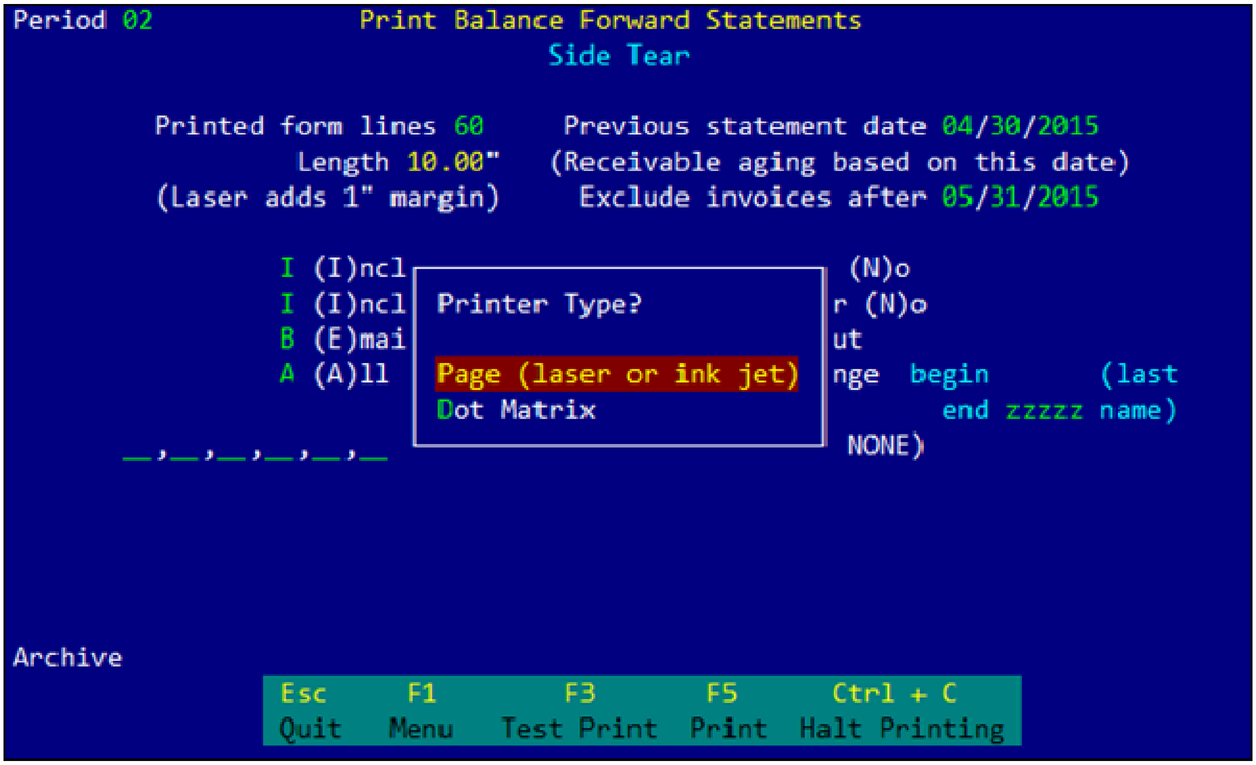
Running statements in PosLinker with Archived Statements

Follow your Normal procedure then press F5 to Archive statements

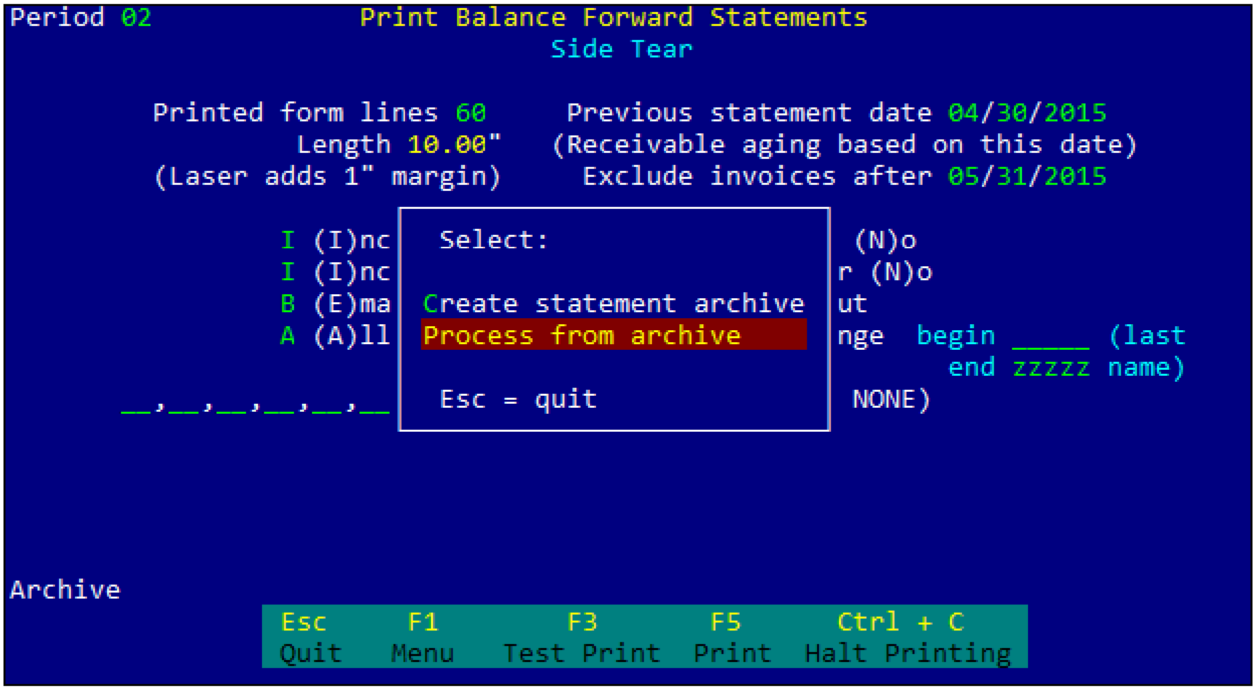


Choose Printer Type

Choose Dot Matrix   for Continuous feed paper or laser for Laser or Inkjet single Sheets

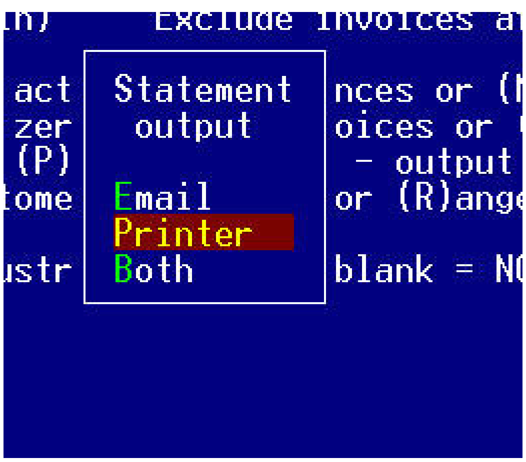


After you have done this Press F5



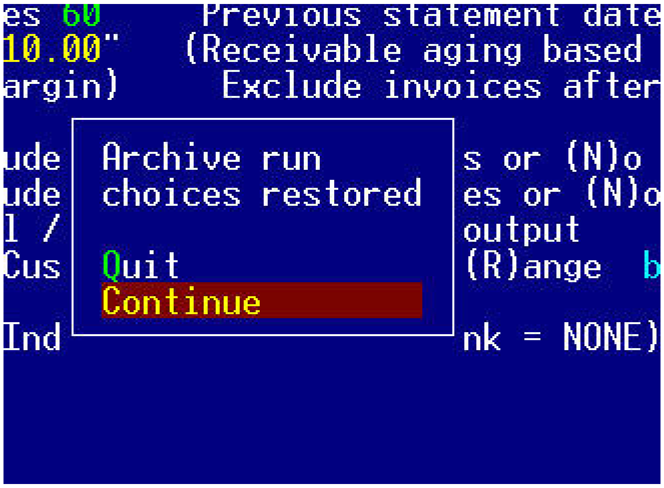
Choose the Archive you wish to print

Choose Output: Email will start if set up



Chose printer if you wish to print them

Chose continue and then chose printer



Statements will print

If an error occurs during statement process:

If for some reason the statement process is interrupted, either manually or because of printing errors, follow these procedures for restarting your statements:

A. If the system has completed processing statements for all customers (You may ensure this by looking at the computer screen to determine the customer on which it stopped)

1. Simply restart the statement process through the reports menu, ensuring that "Previous statement date" is correct. (The system will automatically advance this one month after a statement cycle)
2. Select your parameters and any Industry codes as before.
3. Press F5 - the system will prompt you to answer whether or not you are "reprinting the last statement?" Answer "YES"

B. If the system is interrupted in the middle of the statement process (You may ensure this by looking at the computer screen to determine the customer name on which it stopped)

1. Restart the statement process ensuring that the "Previous statement date" is correct.
2. This time your customer selection should be "R" for range. You will print the range of statements from which you previously stopped.
3. Look at your screen to identify the last statement generated. (Do not go by the last statement to print, as the computer processes well ahead of where it prints) Using that name, you will enter a portion (first 3-4 letters) of the next customer name in the "begin__________" field, leaving the "end" field filled with "z's".
4. The system will prompt you to answer whether or not you are "reprinting the last statement?" Answer "NO"

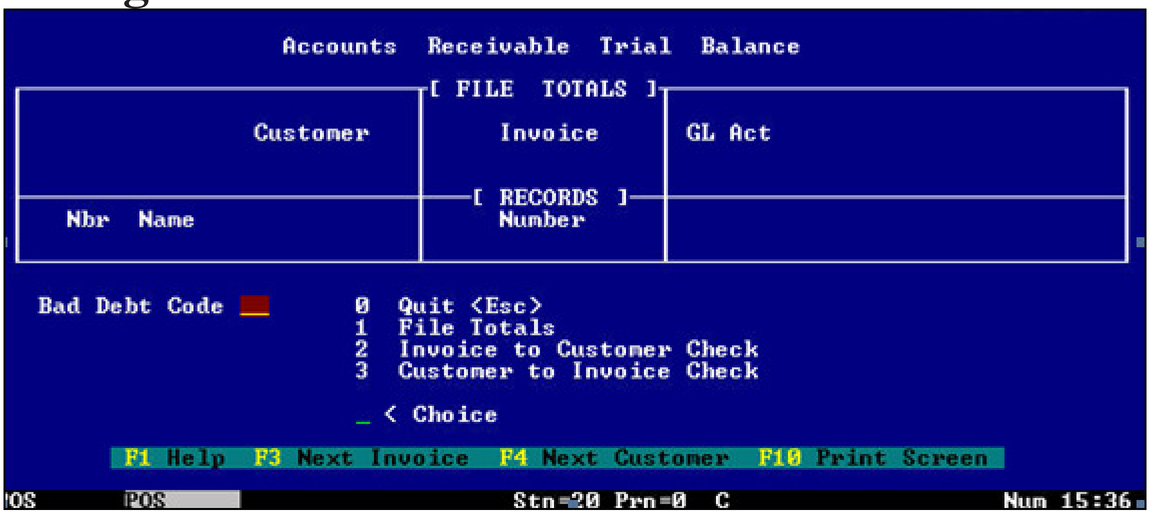
2. Listing **-** will list customer name, number, phone and address. Again, you may choose full customer file, warranty accounts, or lease/finance accounts.

3. Aged Trial Balance **-** provides detailed information of all outstanding customer accounts. This is usually printed and reviewed before printing statements.

Balance Files

This function allows you to track your customer, invoice and General Ledger account file totals. If General Ledger is linked, all three totals should balance. To be most effective, make this procedure part of your daily routine. This will allow for problems to be discovered easily, and corrections made in a timely fashion. This procedure should also be performed **before** statements are run.

Service Charges



Service charges should be calculated monthly, even if you do not charge your customers a fee. This procedure applies all unapplied payments to the oldest outstanding invoice on a customer's account, thus keeping the customer's account up to date and clear of unnecessary information on the overview and statement. To process service charges without charging a fee, simply enter $0 in the "Minimum service charge" field, and (0) zero in the "S/C rate" field.

Removing service charges:

1. On service charge screen, press F3 - Remove S/C
2. The POS Linker system will prompt you to select either "All Customers", or a "Single" customer.
3. Choosing **All Customers** will prompt the user to enter a service charge date from which to remove charges. Once date is entered, press F5 to begin process. All service charges for that date will be removed from the customers' account. The system will respond with "Job complete - press Esc"
4. Choosing **Single** will prompt the user to enter the customer name from which you want to remove service charges.
5. Select a specific customer and then enter a valid date.

6. Press F5 to remove service charges for that date. The system will respond with "Job complete - press Esc". You may enter as many dates as you wish to remove charges.

Direct Mail

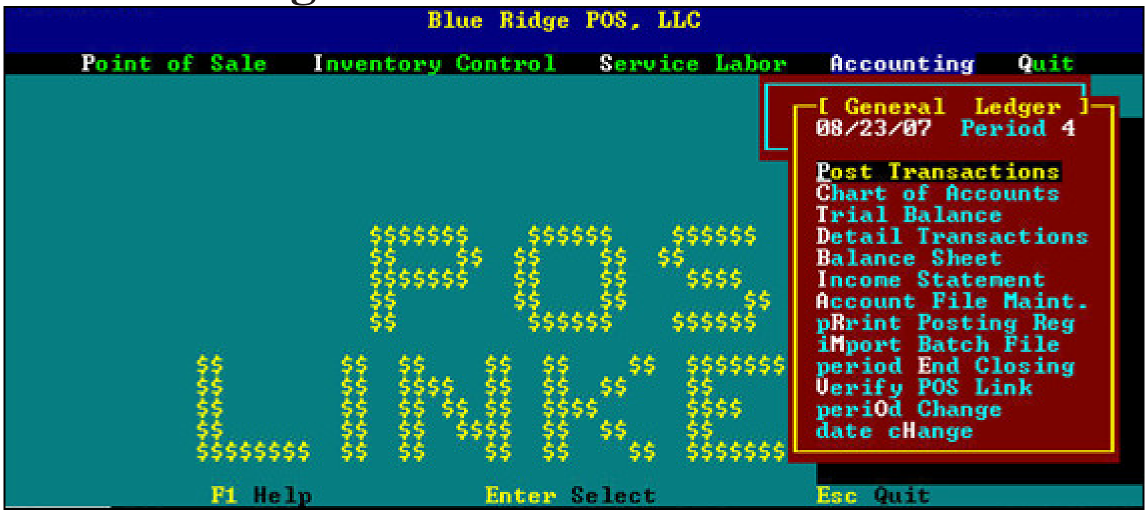
The direct mail is very useful in finding and notifying customers of upcoming sales and special offers. Many dealers use this information to remind customers of scheduled maintenance and other profit enhancing services.

a) Enter choice of mail you wish to print, either labels or post cards.
b) Select order in which you would like the labels or cards to print. You can enter a range either numerically or alphabetically, and even a zip code range.
c) Specify any parameters you would like the system to include.
d) Select F2 if sending post cards to print out your message.
e) Enter the correct number of lines for your labels. Six lines per inch - Ex: One inch label, 1" = 6 lines, Two inch label 2" = 12 lines.
f) Enter your print range, select F5 to print.

Period Change/ Date Change

These options may be used to open Accounts Receivable files created by the most recent "monthly Accounting save" and to back-date reports to the previous period on a specific date. Useful for printing your previous end of month reports during the current month. Be sure to change the period, or date, back to actual date when you've completed your reports for the previous month. If you exit the Accounts Receivable menu, this is automatic.
*****You must have performed an accounting save at the end of the previous month for this to work properly. This function is performed through the "Utility Menu".***

General Ledger

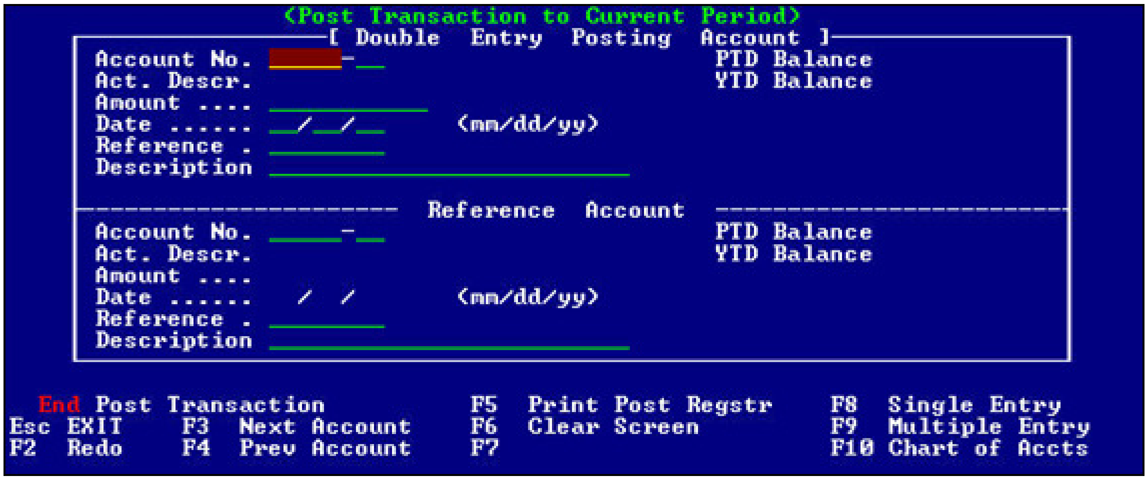


If General Ledger is selected from Accounting, the General Ledger Selection Screen appears. Several choices can be made from the subtopics as follows:

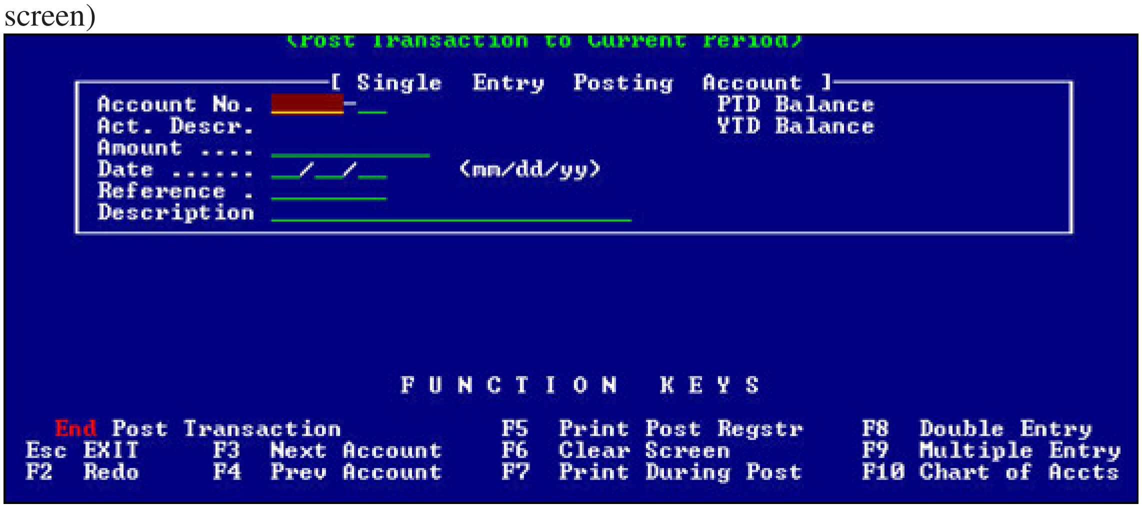
- Post Transactions
- Chart of Accounts
- Trial Balance
- Detail Transactions
- Balance Sheet
- Income Statement
- Account File Maint.
- pRint Posting Reg
- iMport Batch File
- period End Closing
- Verify POS Link
- periOd Change
- date cHange

The General Ledger has the ability to import batch file and data information from other programs such as Peachtree® accounts payable and payroll. The setup and use will be discussed in-depth with the appropriate personnel at the time of setup.

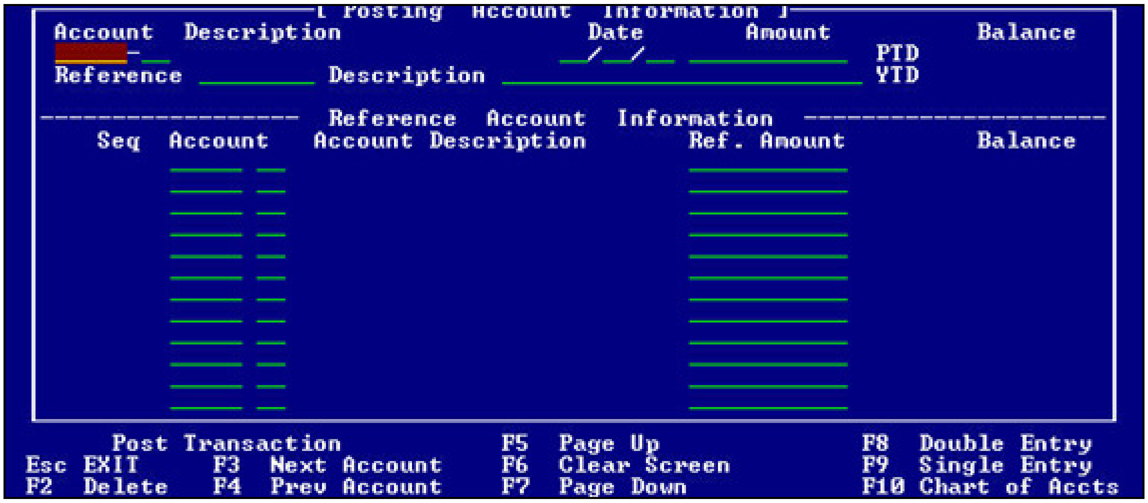
Post Transactions - Allows the user to manually post transactions to general ledger accounts. Double entry posting is used when one account is offset by a single balancing account.



F2 allows you to adjust the dollar amount without clearing the entire account. F5 prints a detailed register of the transactions posted, and if you need to view your chart of accounts, F10 provides a quick link. (Caution: These function keys vary with each screen)



Press F8 for Single Entry posting. This option is used when you need to make an entry to one account. There is no balancing account.



Press F9 for Multiple Entry posting. This option is used when you have more than one account to balance your main account.

Chart of Accounts - Your distributor will assist you in setting up a chart of accounts if desired, or you may wish to follow our sample chart:

Chart of Accounts		
Account Name		**Account Number Range**
1.	**Current Assets**	**10000-17999**
2.	**Fixed Assets**	**18000-18999**
3.	**Other Assets**	**19000-19999**
4.	**Current Liabilities**	**20000-27199**
5.	**Long Term Liabilities**	**27200-27999**
6.	**Equity**	**28000-39999**
7.		
8.	**Cost of Sales**	**50000-59999**
9.		
A.	**Sales**	**40000-49999**
B.	**Other Income**	**60000-69999**
C.	**Operating Expenses**	**70000-79999**
D.	**Salaries**	**80000-89999**
E.	**Adjustments to Income**	**90000-99999**

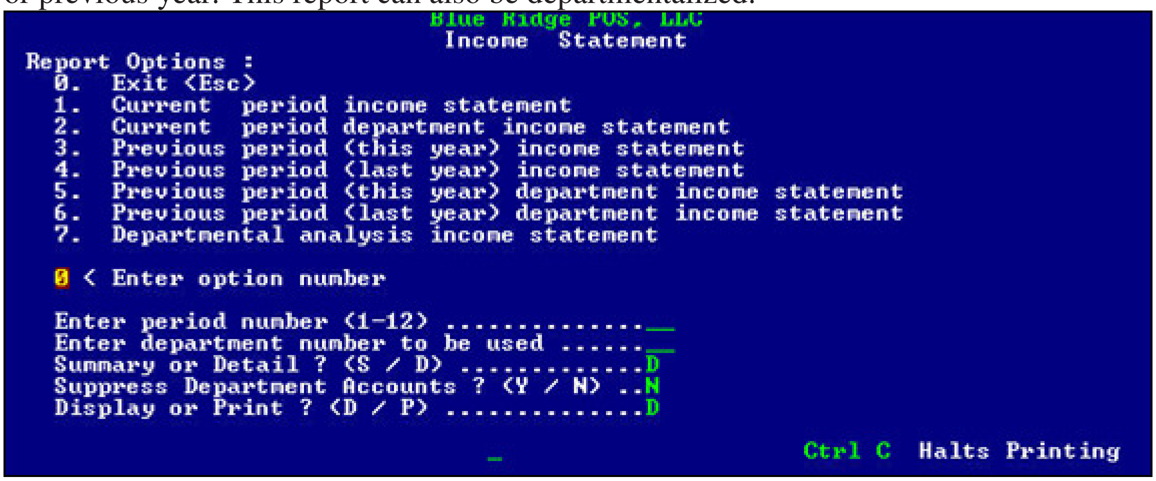
The Chart of Accounts may be printed or displayed on screen by category, ie: Department accounts only, all accounts or single account for your convenience.

Trial Balance - Allows you print or view on-screen a trial balance report of your current general ledger as of today's date. It lists the debit or credit balance of the account as well as the account status - active or inactive.

Detail Transactions - Provides a listing of transactions and budget amounts, by period and year-to-date.

Balance Sheet - allows you to compare current account totals with another month from the current or previous year. It also lists the percentage of change. Subtotals are listed for Current, Fixed and Other Assets; the total of such equaling Total Assets. Subtotals are also listed for Current Liabilities, Long Term Liabilities and Equity; the total of such equaling Total Liabilities.

Income Statement - offers several profit and loss reports by period for the current year or previous year. This report can also be departmentalized:



- compares sales totals and cost of sales totals
- gross profit total
- total other income
- total salaries
- net income before taxes
- total adjustments to income
- net income after taxes

Account File Maintenance

1. Add New Accounts
2. Change or Delete Accounts
   - Enter number of account to be modified
   - If an account has a balance, it is better to change the status to inactive rather than deleting
   - to delete an account with a zero balance, press F7 to turn the delete function on, then press F2
3. Modify Automatic Distribution Percentages for an Account
4. Change last year's account budget and Period Balances
5. Display Selected Single Account
6. Copy Accounts
7. Modify Accounts Category - allows you to change your beginning or ending number range for G/L accounts.

Print Posting Register - prints a detailed report of transactions posted to the G/L for the entire accounting period, or a date range within the accounting period.

Import Batch File - as stated earlier, POS Linker's general ledger has the ability to import batch file and data information from other accounting programs.

Period End Closing - this is the final step to your month-end or year-end close.

Note: A password for your month-end and year-end close out process should have been provided to you by the technician installing your system. In the event of a lost or forgotten password please contact Blue Ridge POS, LLC at (540)672-1212

Quit

Use either the highlight bar, the ESC or Q key to access the exit menu. Press ESC to exit POS Linker. The business system menu will appear and the user may enter the "Utilities" menu “add’tl programs” and "Logoff" the system.

Email Statement setup

Contact us to help setup your Email:
Set up your accounts as below

Make sure to put a Y in the email statement space

9. Period Ending Procedures

The following procedures should be followed at every month end to ensure accurate system information.

Month End Steps

We strongly suggest a re-build of all data file indicies the day before month end closing operations.

NOTE: ***Some of this may be run in the evening so as not to interfere with day to day transactions.***

- Re-boot your system to DOS
- At the POS menu, select "Utilities". From the utilities
- menu, select "File Maintenance" and then "All Files"

Month End Checklist

Back Up the system!!! This procedure should be done on a daily basis if possible, and is ***strongly*** suggested before month end procedures. *Please see page 2-2 for more details*.

Accounts Receivable

1. Balance files - A/R should balance Invoices and General Ledger figures.
2. Compute service charges
3. Save the accounting files - from the Utilities menu select "Other Functions". Highlight the module you wish to save or select "Both"

General Ledger

***These steps need only be done if you are using the POS Linker General Ledger system, or have it linked to Peachtree.*

1. Save the accounting files - if you selected "Both" in step #3 above, proceed to next step.
2. Close the POS Linker General Ledger

Note: A password for your month-end and year-end close out process should have been provided to you by the technician installing your system. In the event of a lost or forgotten password please contact Blue Ridge POS, LLC at (540)672-1212

Parts4Profit

Close the parts period (overnight suggested)

Reports

Select the previous accounting period after closing out the accounting modules to print the following reports.

Accounts Receivable

1. Aged Trial Balance
2. Customer Statements

General Ledger

Print these reports only if you are using the POS Linker General Ledger module. Peachtree users will print reports from Peachtree.

1. Print POS audit by account (POS reports menu)
2. Print posting register
3. Print trial balance
4. Print detail transactions
5. Print balance sheet
6. Print standard income statement
7. Print comparative income statement

Miscellaneous

1. Parts month summary (Automatic unless you change default setting)
2. Weekly employee tracking report (optional)
3. Close employee tracking month

NOTE: ***Always close the Point Of Sale employee tracking on the same day of the week. Each year will include two months with five weeks. When the chosen closing day of the week falls on the last one to occur for the month, close the employee tracking month. This will yield more uniform weekly information.***

Parts4Profit Detail Month End Instructions

Close the parts period. This should be done at the end of each month. Because these files can be rather large, Blue Ridge POS, LLC suggests this procedure be done in the evening. Everyone MUST be off of the system in order for this process to work.

1. Select P for Parts under Inventory Control from the main menu and the Parts4Profit menu will appear.
2. Select E for End Parts Month from the menu. The Parts Month-End Close screen appears.
   - **a.** Press ENTER if the page width field matches the paper being used.
     (R (regular) = 8.5x11, W(wide) = 15x11)
   - **b.** Press ENTER to skip the in-out seasonal minimum re-calc procedure, or press Y to re-calc each part record in-out value that is not frozen.
     ***This procedure can double run time.*
   - **c.** A reminder that all other users must be off the system appears. Press ESC.
   - **d.** A reminder to back-up all parts files appears. Press ESC.
   - **e.** F5 will begin the closing operations.
3. Print parts month summary. Can be done the next day

a. . To bring up the Menu Type F5
b. Choose Print Report Pick Year and Month of the report you want
c. Choose Printer

- **d.** Press ESC to exit after all printing is complete.
- **e.** The Parts4Profit menu should indicate the next month is opened.

NOTE: If the report process is interrupted or halted, the parts month will not advance.

Accounts Receivable
Detail Month End Instructions

The following procedures should be followed to close out your Accounts Receivable files, compute monthly service charges, and issue customer statements.

A. Balance A/R to invoices & GL:

1. Select Accounts Receivable at the main menu.
   a. Accounts receivable menu will appear.
2. Select B Balance Files at the Accounts Receivable menu.
   a. Accounts receivable trial balance screen appears.
3. Select 1 (File Totals).
   a. Customer balances will sum under "Customer" heading.
   b. Invoice balances will sum under "Invoice" heading.
   c. If the General Ledger module is linked the GL account number for accounts receivable and the current account balance will display at "GL Act".
4. Customer, Invoice, and GL Act (if linked) should be equal.
   a. If the above values are equal this step is complete.
   b. If the above values are not equal use selection <2> (Invoice to Customer Check) or <3> (Customer to Invoice Check) to locate the customer(s) that are out of balance. Contact Blue Ridge POS,LLC support if problems persist.
   c. Select <0> or press <Esc> to exit screen.
   d. Bad Debt code - this is used when certain customers are written off as bad debts and their balances are not included in the General Ledger A/R total. A bad debt code entered before selecting "file totals" will cause invoice totals to remain blank.

B. Compute service charges:

1. Select Accounts Receivable at the main menu.
   a. Accounts receivable menu will appear.
2. Select S Service Charges from the menu.
   a. Customer Service Charges screen appears.
   b. If the $.50 minimum service charge is ok press ENTER or TAB, otherwise type the amount.
   c. Change the Service Charge Computation Date if it is not the day following the date statements were printed for the last month-end.
   d. If the 1.5% service charge rate is ok press ENTER or TAB, otherwise type the rate desired.
   e. If general ledger is not linked go to step "*f*". Enter the Service Charge Earnings account number. (If unknown check the chart of accounts.)

f. Press F5 to begin service charge computation or ESC to exit screen.

g. CTRL C will halt this process.

NOTE: If <Abort> is chosen while "Applying payments . . ." appears at "Status:" this job may be re-started anytime. However, if "Computing Service Charges . . ." appears at "Status:" service charges must be removed first or some customers could have double service charges.

h. When this job is complete the service charge assessed total will display. This amount should be reasonable.

i. Use ESC to exit or F3 to remove service charges.

- This process should be followed even if you do not wish to charge your customers a service charge. This allows payments made during that month to be applied to the oldest open invoices, thus purging old invoices.
- To process service charges without charging a fee, simply type $0 (zero) for the "Minimum service charge" amount, and $0 (zero) for the "S/C rate".

B. Print aged trial balance report:

1. Select Accounts Receivable at the main menu.
   - **a.** Accounts receivable menu will appear.
2. Select R Reports from the menu.
   - **a.** Customer Report Generator screen appears.
   - **b.** Select 3 (Aged Trial Balance)
   - **c.** Press F5 to start printing.
   - **d.** Press ESC to exit screen.

Review the Aged Trial Balance printout before printing statements. Make sure accounts are in order and service charges have been applied properly.

C. Print customer statements:

1. Select Accounts Receivable at the main menu.
   - **a.** Accounts receivable menu will appear.
2. Select R Reports from the menu.
   - **a.** Customer Report Generator screen appears.
3. Select 1 (Customer Statements).
   - **a.** Select type:
     - "Balance Fwd" for pre-printed forms

       or
     - "Open Invoice" for plain forms.

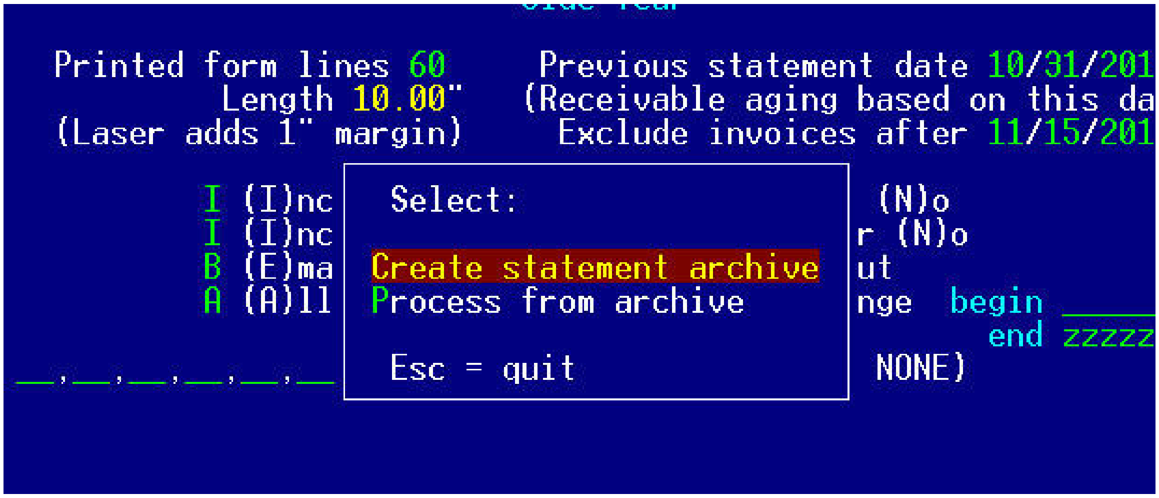
   b. Check the previous statement date and make selections.

   - **c.** Print Customer Statements screen appears choose Create Archive,
   - **d.** Exit out and process from Archive..
4. Press the function key that corresponds to function desired. ESC will exit. F3 will help align preprinted forms in the printer, and F5 will begin the print process.

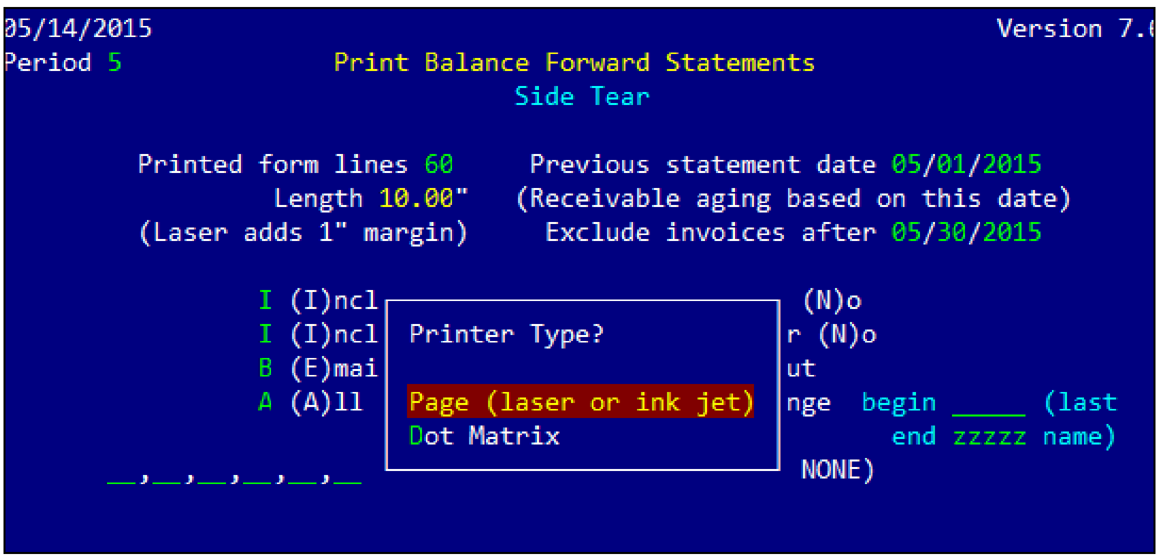
Running Archived Statements

Prior to emailing statements you must set up the customer email and put a Y in the email statement space in the customer file

Follow your Normal procedure then press F5 to Archive statements

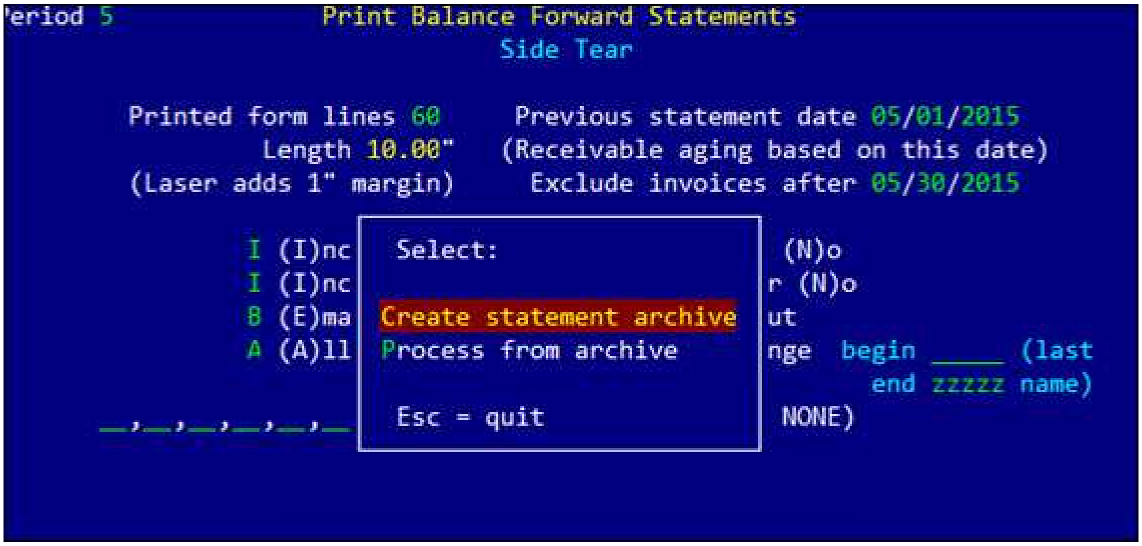


Choose Printer Type



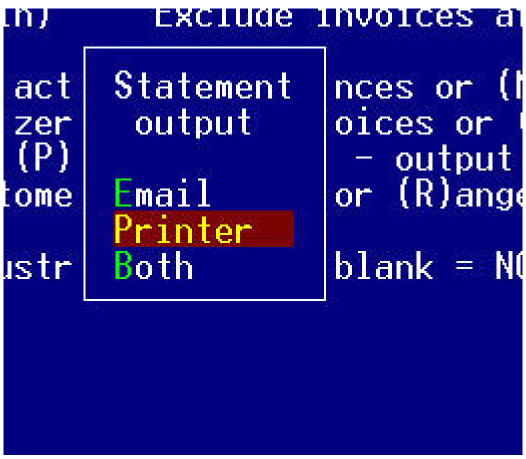
Choose Dot Matrix for Continuous feed paper or laser for Laser or Inkjet single Sheets

After you have done this Press F5



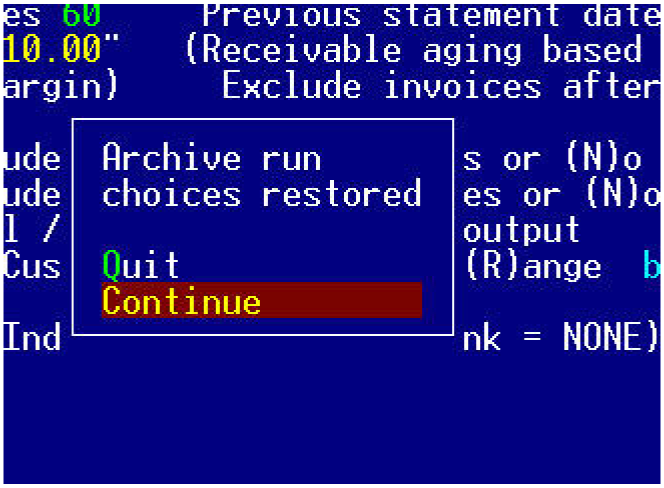
Choose the Archive you wish to print

Choose Output: Email will start if set up



Choose printer if you wish to print them

Choose continue and then choose printer



Statements will print

5.

*****Reminder: Do you wish to change your statement message before printing? For more detail, see bottom of pg. 3-8.***

D. At this point you should run the monthly accounting save, by pressing U,O,M from the black screen. If asked to archive choose yes

E.. Although optional it is highly suggested that you update the "Area for Training" By pressing U,A,U form the black screen, this gives you a excellent record if you need to trace a transaction.

10. Tips & Techniques

This chapter is dedicated to providing you with updated solutions to some of the most common "how to" questions we receive from our users. By sharing these inquiries and their solutions with other users, Blue Ridge POS, LLC hopes to enhance your knowledge of the POS Linker business system. Blue Ridge POS,LLC will send out updates to this chapter so that you may continually add them to your manual for future reference.

Frequently Asked Questions

1. How do I enter parts that we will not track inventory quantities of?
(ex. Small sales of lengths of rope, chainsaw chain, or fuel line which are bought in rolls but sold cut.)

One method is to make up a part number for the item. Install it in inventory on the Inventory Control, Parts, Inventory file screen. Go to the on hand quantity field and fill it with nines. By filling this field with nines POS Linker knows never to deduct any of this part number from inventory, however it will track sales of this part. Also see question three about shop supplies.

2. How does the program handle parts going onto repair tickets?
When do we take the part out of inventory?

Parts being allocated to repair tickets should be entered on the repair ticket when they are pulled from inventory. The computer will automatically treat the part as if it had been sold, removing it from visible inventory. When the service order is processed the part sale will be posted in the general ledger.

3. How do I sell shop supplies used in service orders? (i.e. grease, nuts, bolts, etc.)

Shop supplies should be treated as regular parts items with a part number such as ***SS*** for shop supplies. You will have to decide on the appropriate number and then create it in inventory. Give this number an unlimited quantity so inventory tracking is handled totally by the computer and reorders are not based on individual parts sales. Some dealers do something similar to handle the costs associated with recycling oil, antifreeze, batteries and other hazardous waste products.

4. How do I make a parts memo appear on the screen?
Can this memo be printed on the invoice?

The memo may be added to any part by going to the Inventory Control, Parts, Inventory File screen. This memo can be made to appear on either the screen when the part number is entered, or on an invoice, or both. This is accomplished by selecting either a “Y” or “N” in the two fields following the memo field.

5. How are the prices frozen on parts?
Does this price adjust when new price lists are loaded?

Prices are frozen on the Inventory Control, Parts, Inventory File screen in the Indicators section. In the Freeze field type an F to freeze or leave it blank to unfreeze. The default is unfrozen. Parts marked with an F are price updated with new price lists, however, the prices on the inventory record are not changed. A list of frozen parts can be printed during "Price Data Import".

6. Can the cash drawer be opened without using a key or processing a sale?

Yes, the salesman can enter the password (initials) at the invoicing screen, then select Open Cash Drawer in the menu. Also allows this function to be password protected even further.

7. What needs to be done at month's end?

There are many chores that should be accomplished at month's end depending on which modules are running. *See Chapter 9 for more details and checklists.*

8. How do I process Manufacturer rebates on wholegoods?

Through the Invoicing screen, on a complete good invoice. Skip the tag number, and simply enter "Rebate" under model. Your quantity will equal (-1), and will be a non-stock item. Enter the rebate amount as negative. List price = Dealers rebate amount to the customer, Cost = Manufacturer rebate to the Dealer.

9. How can I exempt certain customers from receiving statements?

On the Customer Information screen, under Demographics, you may enter a predefined code in the Industry field. For example:

- 01 = Customers who pay by invoice
- 02 = Write offs

On the statement screen, before processing, you may enter as many as five Industry codes for exemption.

10. How can I put service order #s on statements?

When processing the service invoice, simply type in the service order # in the PO# field. You may type in both numbers if needed. Whatever is typed in that field will appear on the statements.

11. How do I change a Manufacturer code?

Under Complete Goods, Complete Goods Manufacturer Division screen, you must create the new division control record by entering all information for the new manufacturer. If you are linked to GL, you should use the same GL account as the original file. You must then correct each and every tag number from the original file with the new manufacturer and make. This is done on the Complete Goods, Inventory File screen. Once all new information has been entered and saved, pull up the original file with the undesired code and hit F2 to delete.

For Parts:

a) Setup the new manufacturer code you wish to use.
b) Select "Utilities" menu function under the Parts4profit submenu, and choose "Change Manufacturer code".
c) Enter the old manufacturer code and the new manufacturer code you wish to change to. Press F5 to begin.
d) Once this process is complete, return to the Parts Manufacturer Division screen, delete the old manufacturer division.

12. How can I adjust my cost or list prices on a particular manufacturer?
An example of this need would be if a manufacturer made a 10% price increase of all parts across the board, but did not issue a price file update.

a) Under the Parts4profit menu, select Utilities
b) Select option #1, Adjust Price list.
c) Enter the manufacturer code
d) Basis = (C) - your change is based on your cost
e) Affect = (C) - you will be affecting cost by this procedure
f) Sign = (P) - this is a positive (adding 10%) adjustment
g) Markup = 10 (10% increase)
h) Limit = 99999 - this will ensure that all part numbers are affected
i) Press F5 to begin **You may want to run the same procedure a second time on (L)ist prices**
j) Once this process is complete, do a Price Data Import to change all inventory records.

*****It is always a good idea to have your latest price update floppy from BRC on hand in the event a mistake is made during the procedure*****

13. How do you make all Used Goods tax exempt?

Under the Complete Good Manufacturer Division screen, enter your manufacturer code for Used Equipment/Goods (ex: UG, UE). Enter through to "Tax" field and press F7, select the tax code for tax exemption and press END to save.

Suggestion Form: fax to BRPOS, LLC at (540) 672-4437

Please copy and use this page to mail or fax suggestions to Blue Ridge POS,LLC. We take your suggestions seriously and are always striving to improve POS LINKER. By using this form for suggestions, support questions or to report suspected software bugs we can better track and respond to your needs.

Company Name: ____
Contact ____
Address ____
City_______________________________________ **State**________
Phone (____) ____–_____
Fax (____) ____–_____

Please check the appropriate box and explain below: (include any screen prints or other paperwork)

- ☐ Suggestion for enhancement in future versions
- ☐ Suspected software bug
- ☐ Support or documentation question
- ☐ Other

Please explain:

NOTE: Blue Ride POS, LLC is continually adding new vendor price lists. If you need one and do not see it on our lists we may already have it or we will assist you in obtaining one and loading it on your computer. Some price lists require special dealer certification and may only be available to certain authorized dealers. Please check with Blue Ridge POS,LLC if you have any other questions.

Power Equipment

- AMF (NOMA) Lawn Chief Stens
- Ariens Little Wonder Stihl
- BCS Makita Sunbelt
- Briggs & Stratton Maruyama Tanaka
- Coleman McCulloch Tecumseh
- Cub Cadet MTD Tillotson
- Cushman Murray Toro
- Dixon Olympic Toro Comm.
- Echo Onan Tucker/Rocky
- Exmark Oregon Walbro
- Foote PLP-Foley Wisconsin
- Garden Way Polaris Woods
- Gates Poulan Yanmar
- Generac Power King Yazoo
- Grasshopper Ransome Zama
- Gravely Red Max
- Green Machine Robin
- Homelite Roper/AYP/Yard Pro
- Honda Rotary
- Husqvarna Ryan
- Ingersoll Sachs-Dolmar
- John Deere Scag
- Jonsered Shindaiwa
- Kawasaki Silver Streak
- Kohler Simplicity
- Lawnboy Snapper

Agricultural

- Bob Cat
- Bush Hog
- Case IH
- Deutz Allis
- Fiat Tractor
- Gleaner
- Hesston
- Kioti
- Krone
- Kubota
- Massey Ferguson
- New Holland
- Riverside
- Tisco
- White -New Idea

Motorcycle

- Motorcycle Stuff
- Parts Unlimited
- Tucker/Rocky
- Yamaha
- Tomos
- Suzuki
- Tigershark

Other Industries

- Black & Decker
- Makita
- Pennington Seed
- Sentry Hardware
- Thompson Electron
- Watters & Martin
- Wetsel Seed
- Wolverine

Compatible Software

The following software systems are compatible with POS Linker, however, Blue Ridge POS, LLC does not support these systems. If you have questions regarding the purchase and/or installation, please feel free to call.

- PartSmart
- Pal
- Peachtree Accounting
- Microsoft Office

Quick NOTES:

Complete this task list between the 25th and 31st of the month:

1. Print Service Order Report.	(Service Labor, S, R, 2 or 3, C, Y, F5)
2. Everyone log off the system.	(Escape to "black screen", U, A, L or "POTS" out.)
3. Print closing daily sales report.	(Point of Sale, Report, 1, ESC)
4. Reboot to DOS	(U, R, Y) (on boot menu arrow up, ENTER)
5. Update training area	(U, O, U)
6. Back-up! Back-up! Back-up!	(U, A, Month End Full Backup, "any key")
7. Run Scandisk	(U, A, D, 3 Scandisk, X)
8. Run Defrag	(4 Defrag, Read screen, "any key")
9. Exit to "black screen"	(5 Exit)
10. Re-boot to REAL/32	(CTRL + ALT + DEL, ENTER)
11. Rebuild Files	(U, F, All Files, Read screen, "Any key")
12. Go Home!	

P.O.S Linker - Closing Procedures (Standard Version – A/R & G/L on 31st)

Complete this task on the last day (31st) of the month.

(Reference Chapter 8 of the P.O.S. Linker manual for more detailed information on closing procedures.

1. Print Service Order Report. (optional) (Service Labor, S, R, 2 or 3, C, Y, F5)
2. Be sure that all sales and payments to customer in house charge accounts that you want to appear on this month's billing statements have been posted.
3. Everyone off the system until the rest of this list is completed.
4. In Accounts Receivable, Balance Files. When balanced, use F10 to print screen,
5. Back-up (U, B) if you have not already done so.
6. In A/R, Calculate Service Charges, then write down the accumulative service charges on the screen print done in step 4.
7. Print closing daily sales report. (Point of Sale, Reports, 1)
8. Post G/L. Reference your POS Linker to Peachtree Posting instructions for posting procedures.
9. Escape to the "black screen" and perform Monthly Accounting Save. (U, O, M, Both Groups)
10. Archive POS accounting data when the system prompts you. (This saves a copy of G/L & A/R.)
11. In POS Linker G/L, close the period.
12. Print employee performance Month-to-date report. (POS setup, Employee File, F5 M.)
13. Reset counters to zero for the next month. (F8, Y.)
14. End parts month. (ESC, ESC, Inventory control, P, E, **Read Messages**, F5)
15. Re-start imaging server. (U, A, R)

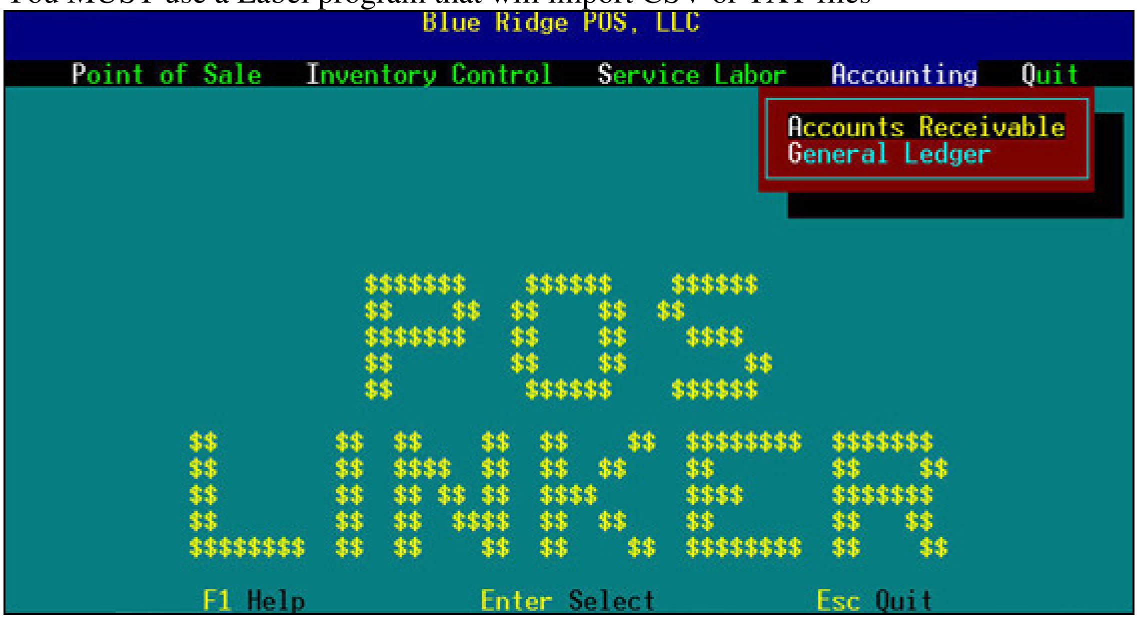
Go Home!

Any day in the new month.

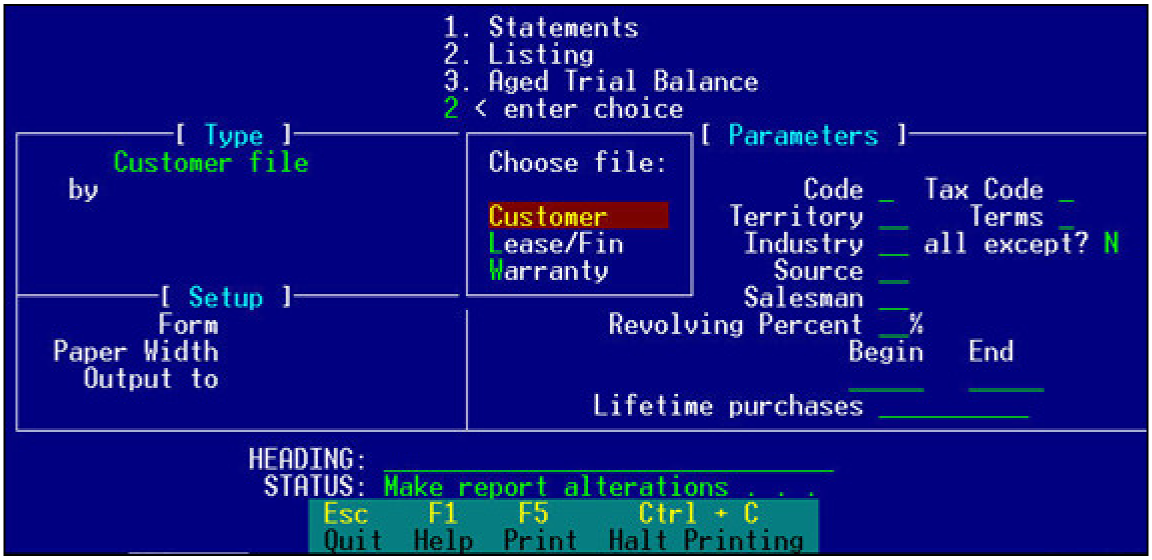
1. To print reports (including statements) as of the previous month end:
   A. Select previous period (Red menu).
   B. Use Date Change to set the date desired on report (Red menu).
2. Print reports, etc.
3. Remember, each time you return to the red menu, you will have to change date again. (This method eliminates customer record lock conflicts and allows invoicing in the new month without delay.)

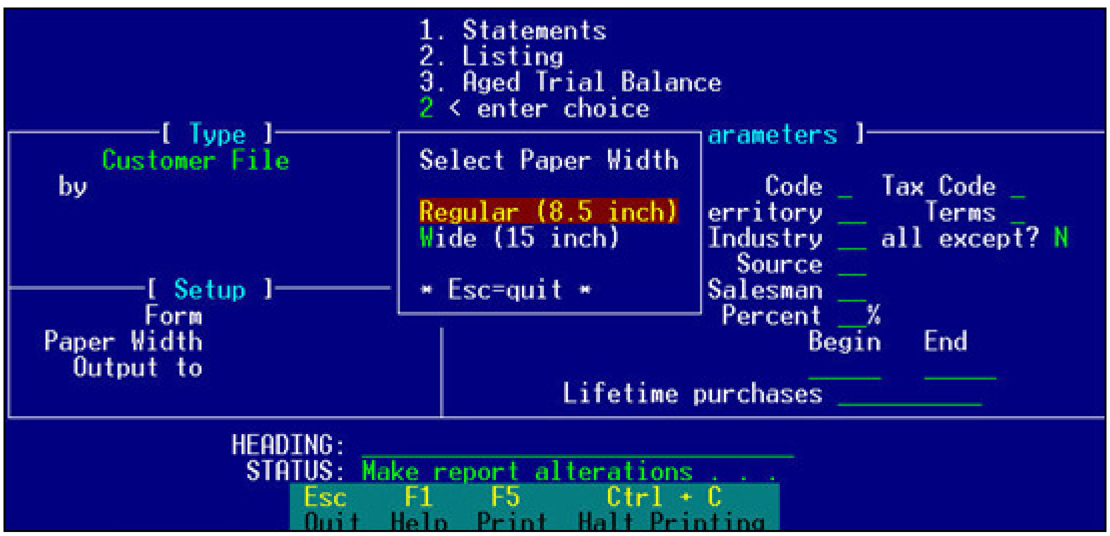
Labels

To Transfer Labels to Label Program in window
You MUST use a Label program that will import CSV or TXT files



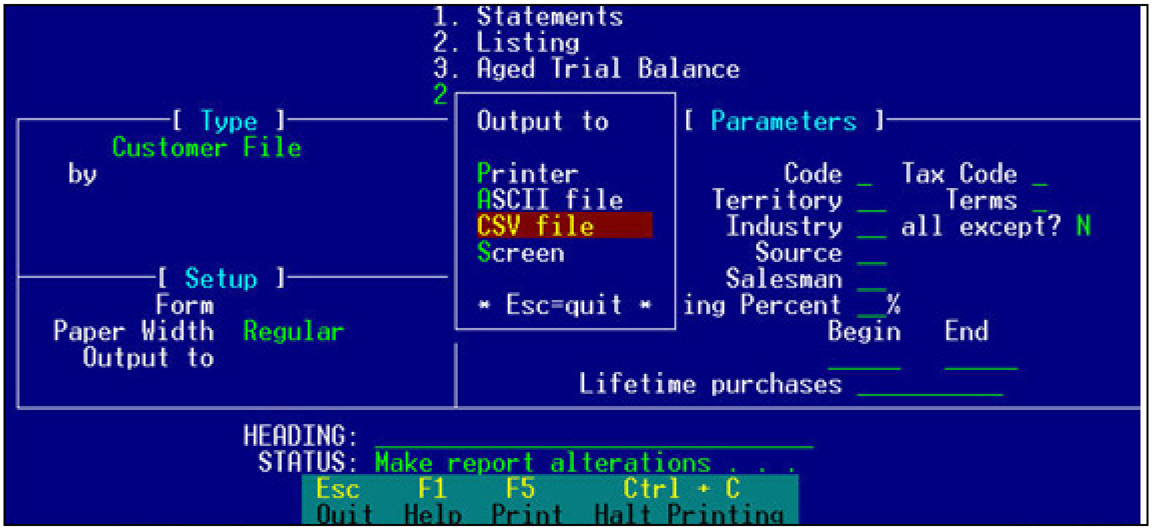
From Reports
Choose Listing
Chose Customers



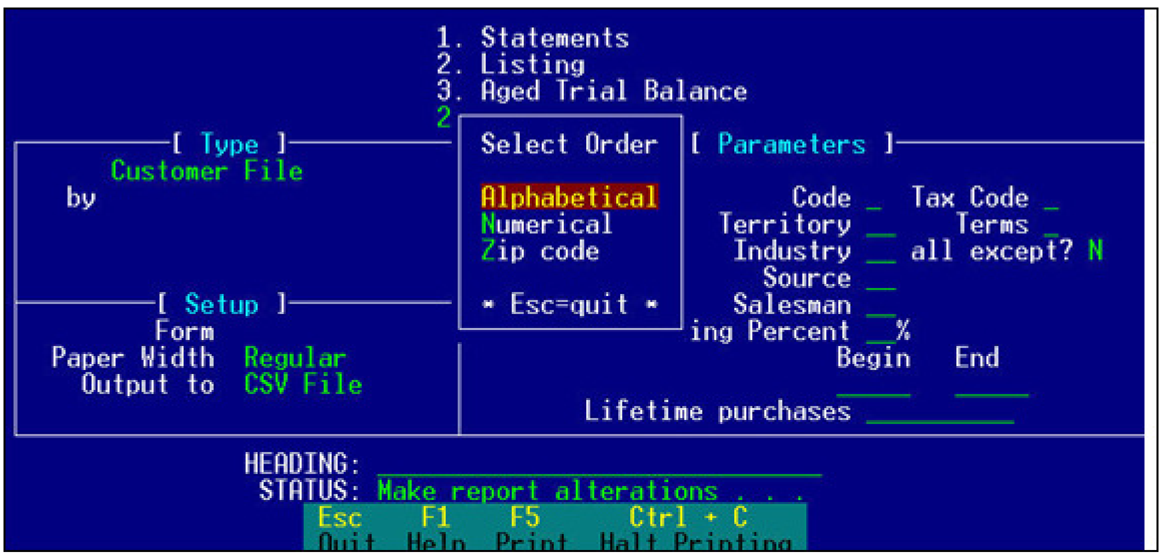


Chose Regular Paper

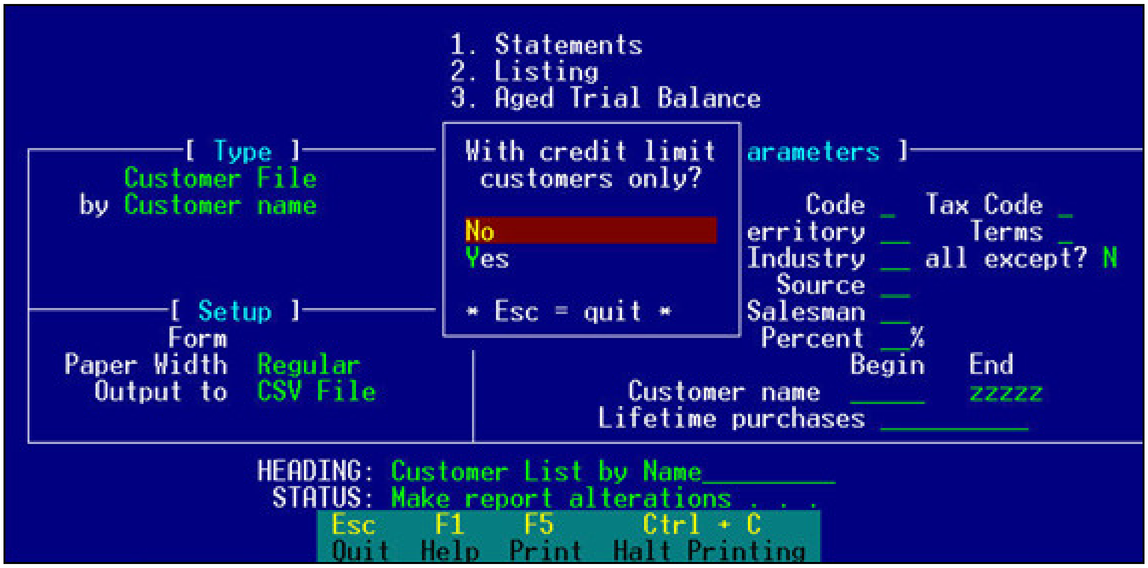
Chose CSV file

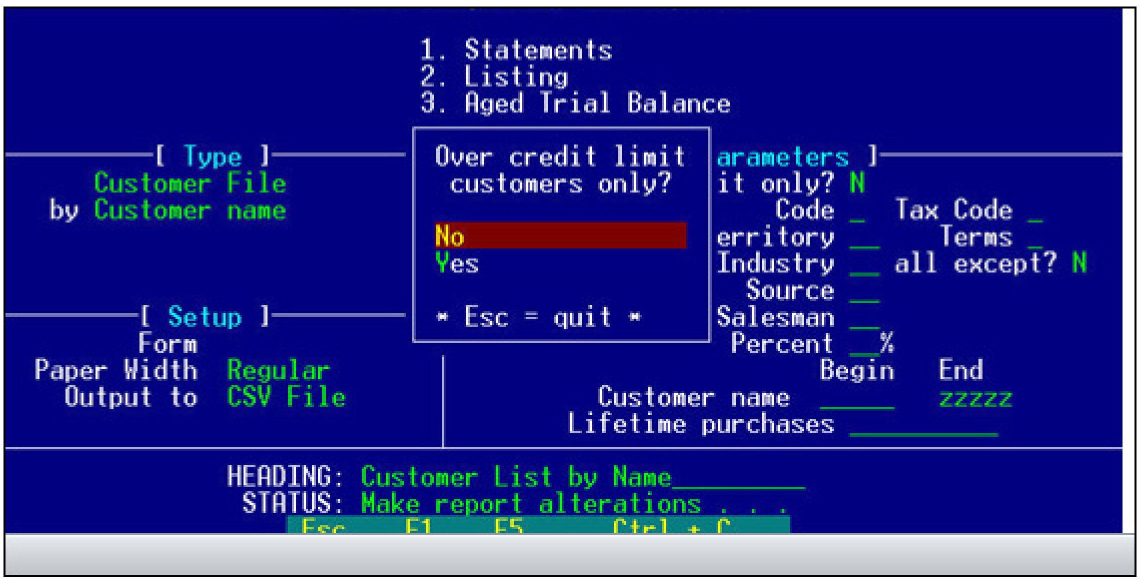


Rename the file (leave O: and .TXT)

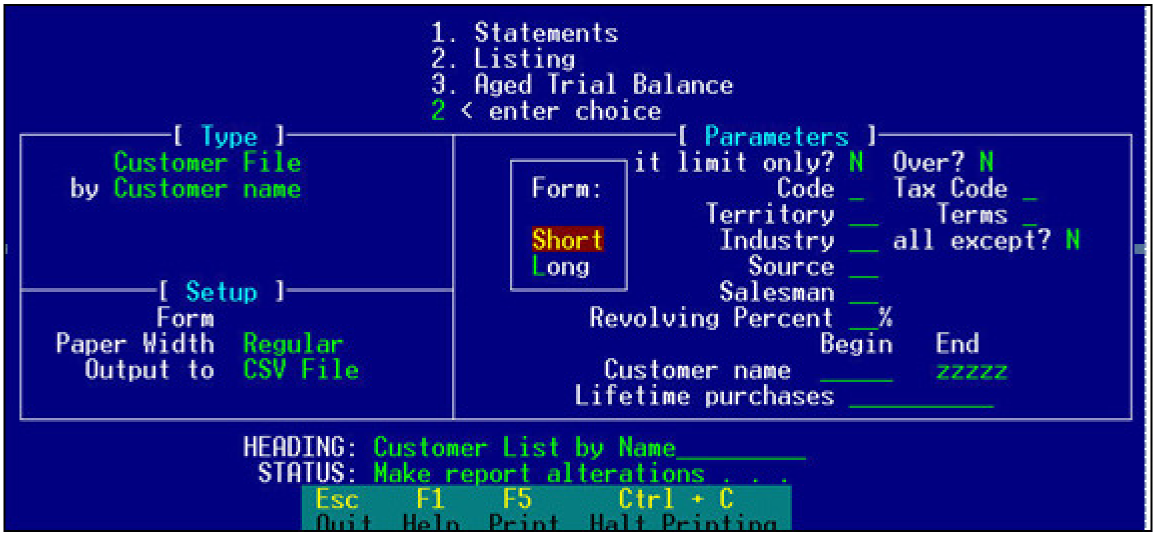


Choose how you want the order



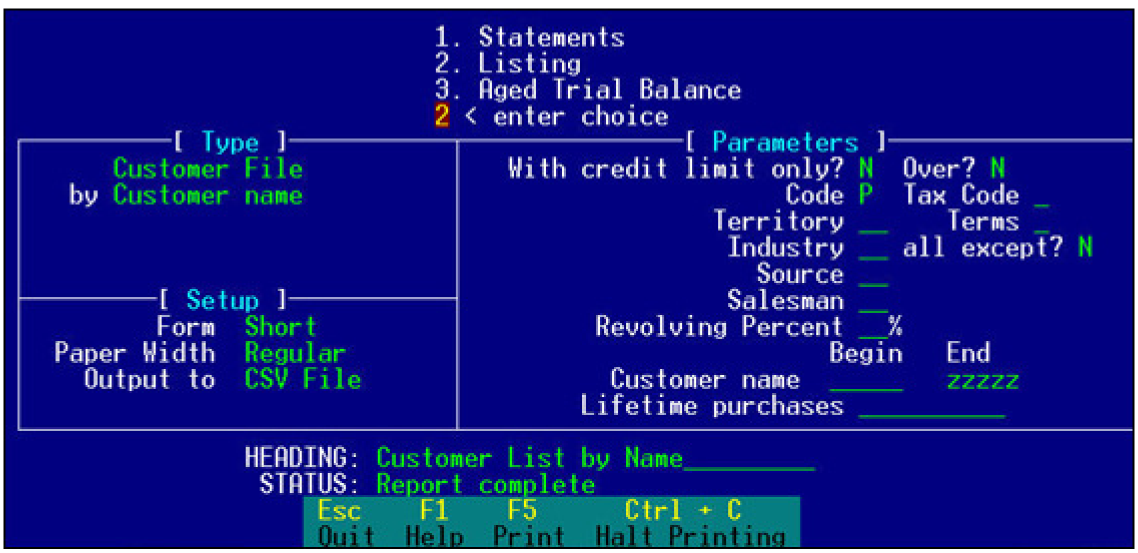


Choose parameters



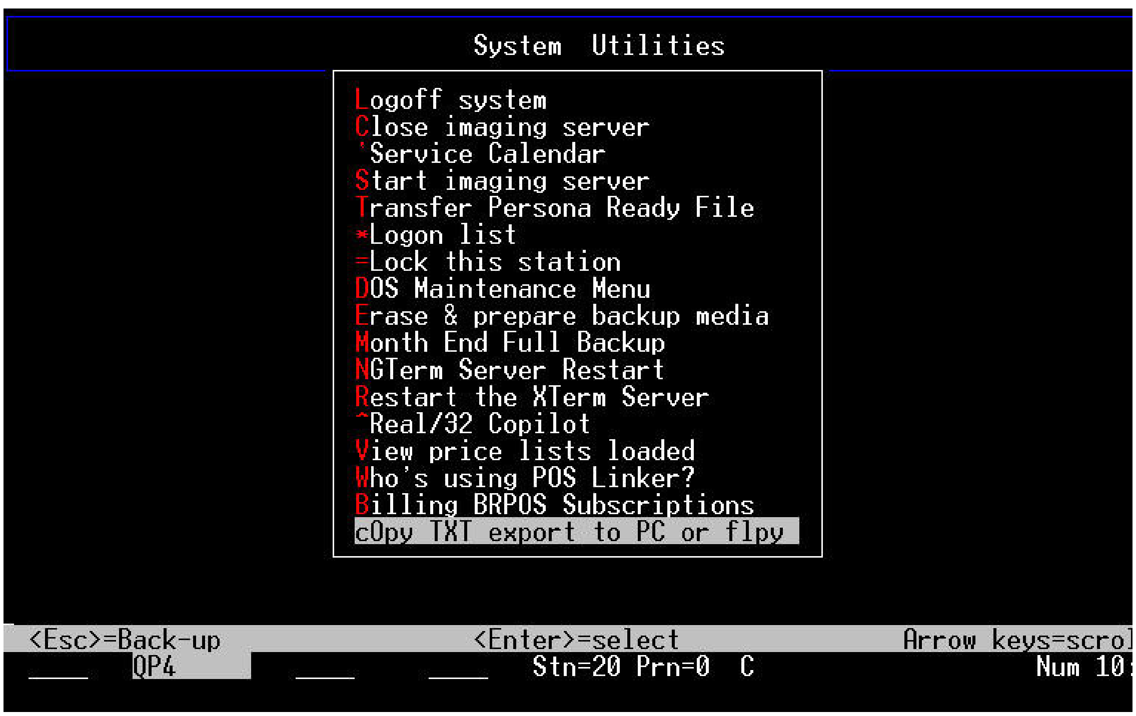
Chose Form Length and Code from your lists

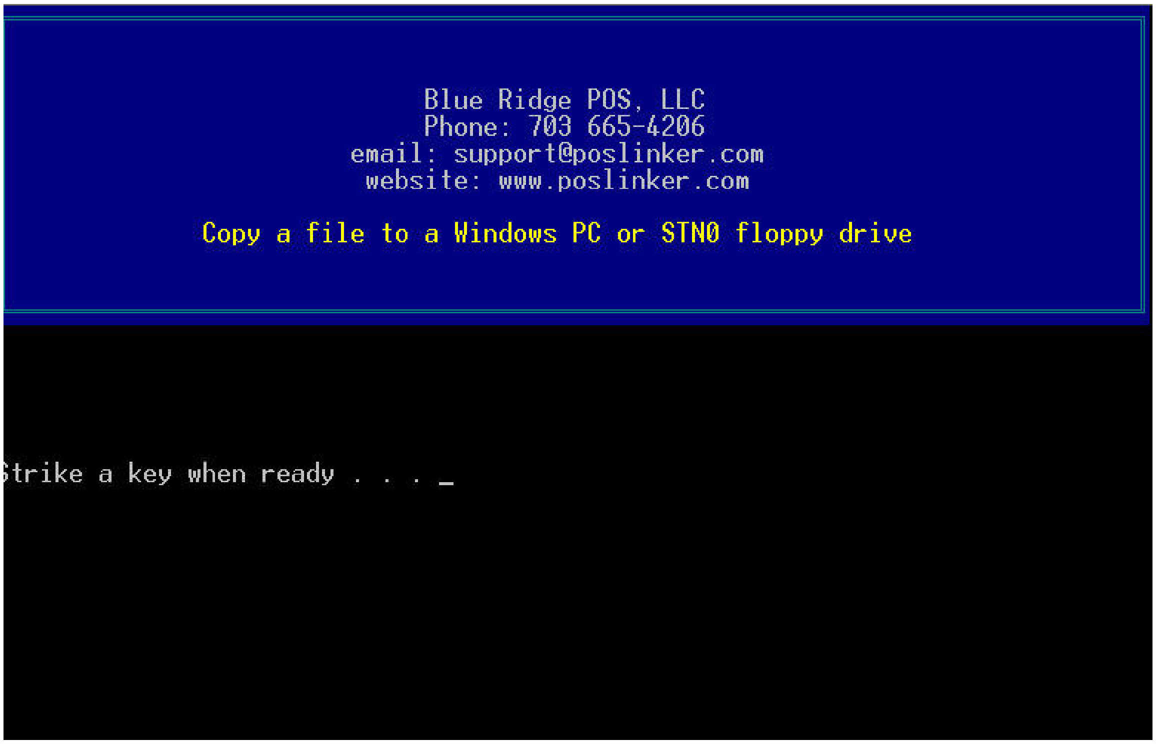
Press F5



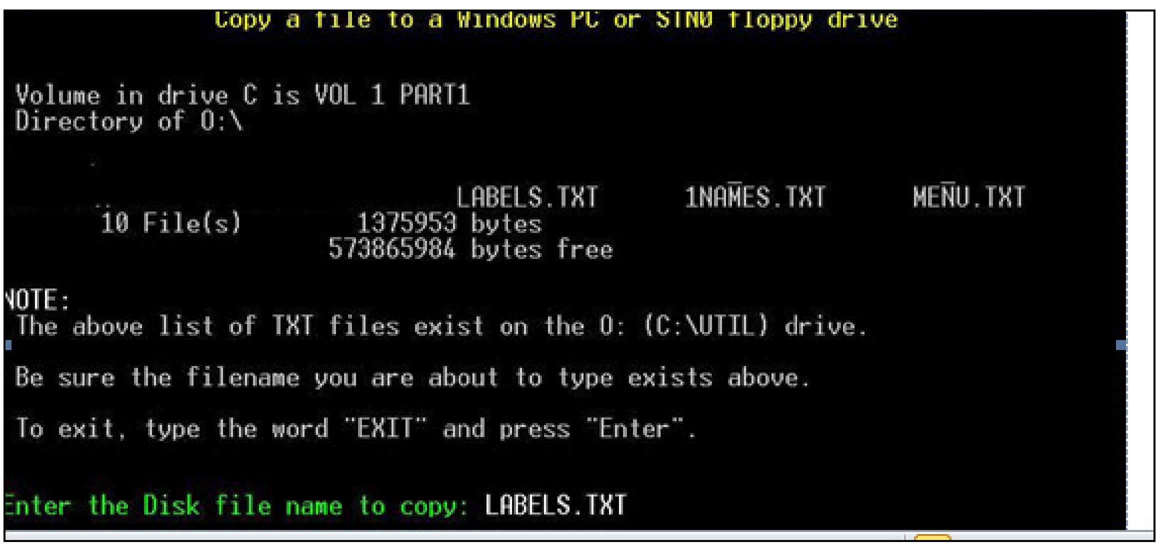
Report is complete
Return to Black Screen


System Utilities
Backup system
Load price list
Program load
Eject page
Display status
Safe shutdown
Reboot system
File maint.
Add'tl programs
Other functions
<Esc>=Back-up
<Enter>=select
Arrow keys=scr
QP4
Stn=20 Prn=0 C
Num 1


System Utilities
Logoff system
Close imaging server
'Service Calendar
Start imaging server
Transfer Persona Ready File
*Logon list
=Lock this station
DOS Maintenance Menu
Erase & prepare backup media
Month End Full Backup
NGTerm Server Restart
Restart the XTerm Server
^Real/32 Copilot
View price lists loaded
Who's using POS Linker?
Billing BRPOS Subscriptions
cOpy TXT export to PC or flpy
<Esc>=Back-up
<Enter>=select
Arrow keys=scrol
QP4
Stn=20 Prn=0 C
Num 10

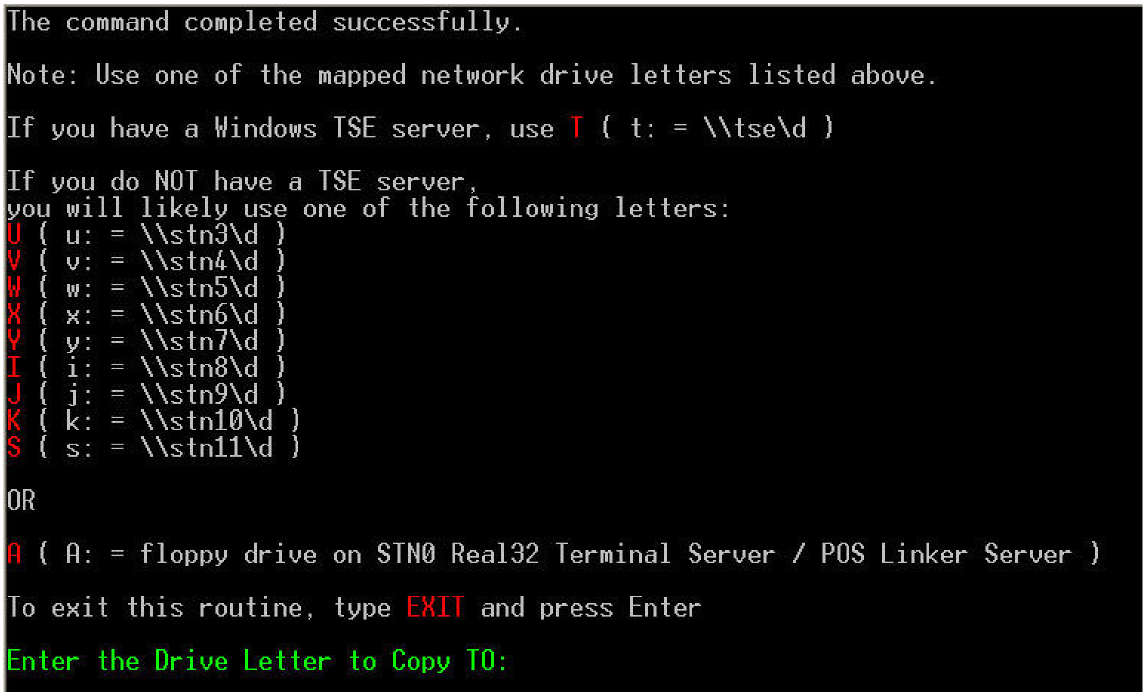


Strike a key when Ready



Chose the File you wish to copy

Press Enter,
Next Screen says to strike a key when ready
Strike Key



```
The command completed successfully.

Note: Use one of the mapped network drive letters listed above.

If you have a Windows TSE server, use T ( t: = \\tse\d )

If you do NOT have a TSE server,
you will likely use one of the following letters:
U ( u: = \\stn3\d )
V ( v: = \\stn4\d )
W ( w: = \\stn5\d )
X ( x: = \\stn6\d )
Y ( y: = \\stn7\d )
I ( i: = \\stn8\d )
J ( j: = \\stn9\d )
K ( k: = \\stn10\d )
S ( s: = \\stn11\d )

OR

A ( A: = floppy drive on STN0 Real32 Terminal Server / POS Linker Server )

To exit this routine, type EXIT and press Enter

Enter the Drive Letter to Copy TO:
```

Chose the stn number you wish to send the file to.

Retrieve file from the root of the D: drive or Shared drive on the windows computer
Move that file to location on your Windows computer that will be easy to open in your Label Program (My Documents etc)

Follow the Instruction for your Label Program; Remember the program must import TXT or CSV files

NOTES:

11. Software Support Policy

Support Policy

Our superior customer support is what has elevated BRPOS, LLC to the prominent position we celebrate today. To continue our growth in this area, a detailed software support policy has been outlined better serve our clientele. It is our desire that this policy will lead to the expanded customer support and continued industry leadership you've come to expect.

NOTE: While we will do everything in our power to answer any question you may have, we do ask that you please refer to your manual first. We cannot take the place of our documentation, nor can we act as program consultants for third-party software.

STANDARD

- E-mail and FAX support for POS Linker and all BRPOS interfaces.
- Includes all POS Linker upgrades.

SILVER

- E-mail and FAX support (all year) for POS Linker and all BRPOS interfaces.
- Adds phone support from Mar 21 through Sep 21.
- Includes all POS Linker upgrades.

GOLD

- E-mail, FAX, and phone support (all year) for POS Linker and all BRPOS interfaces.
- Includes all POS Linker upgrades.

Platinum

Take advantage of all the features of our Gold package, PLUS the addition of:

- Up to two (2) hours per month of phone support for any Windows related issues from printers to normal Windows applications such as:
    - MS Word
    - Excel
    - Outlook/Outlook Express
    - …and more!
- Includes all POS Linker upgrades.

Platinum support is our premier plan, and provides peace of mind along with optimum budget control.

**All plans can be paid for either monthly, or annually for extra savings.
If paid annually, pay for 11 months and get one month **FREE!
**Annual billing takes place in June, when business revenue is normally at its highest.
**Packages do not include on-site support.
**Standard, Silver and Gold support packages are for POS Linker questions only.
**Two hours of phone support per month with our Platinum package is non-cumulative.

90 Day Automatic Coverage

When you call for technical assistance, please provide the representative your name, program name, and serial number. Before anyone can help you, this information must be recorded. Please note that free updates are included during the complementary 90 day automatic coverage.

Software Maintenance Plan

Our premier software maintenance plan may be purchased at any time. However, it is a good idea not to let too much time lapse after your 90 day coverage is over. If a new version is released while you are not covered you will be required to purchase an update. We can only support the current version of each program. Coverage is billed monthly.

Coverage

The 90 day coverage and the software maintenance plan covers:

- Telephone support during normal business hours
- Help with unusual installation problems or questions
- Questions concerning documentation
- Processing difficulties or questions
- Automatic updating service
- Hardware support for items purchased from BRPOS, LLC, or licensed distributor
- Replacement within 24 hours (repairs not included)

Our 90 Day Coverage and Software Maintenance plans **DO NOT COVER:**

- Operating System support.
- Accounting consultation.
- Non-BRPOS, LLC software applications.

NOTE: Following the free 90 day automatic coverage, those customers not currently subscribed to our monthly software maintenance plans will have access to phone support during regular business hours under the following conditions.

Telephone Consultation

Telephone consultations are billed monthly, in ¼ hour increments. It is available for any or our valued clients who have “just one little question”, but are no longer covered by our complementary 90 day coverage or software maintenance plan. This service is also available to anyone who wants additional support such as accounting and operating system consultation. Whenever possible, we advise that you contact your distributor first. If your distributor is unavailable, you may contact BRCPOS, LLC directly at (540)672-1212 for support during normal business hours.

NOTE: Repair service for hardware is not included. Most hardware is covered by manufacturer warranties. Other repair services will be accomplished at an hourly rate.

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