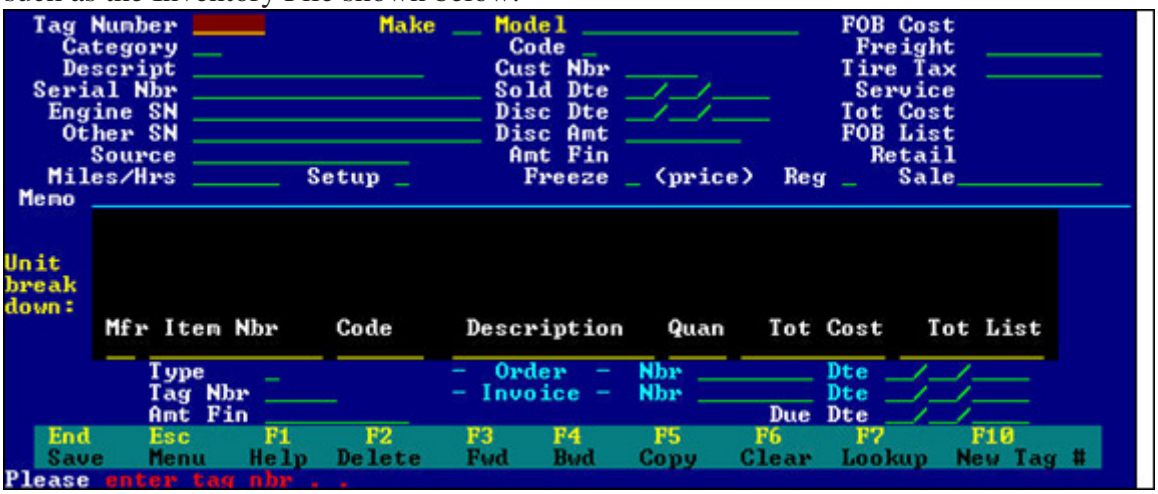
6. Complete Goods

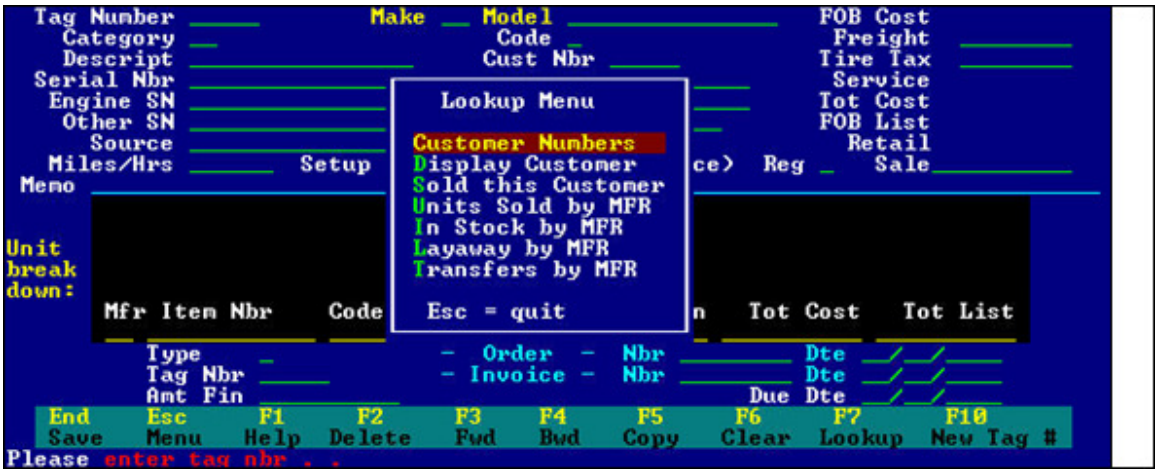
If Complete Goods is selected from Inventory Control, then the Complete Goods Selection Menu appears. Several choices can be made at this point from the subtopics such as the Inventory File shown below.



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

```
D I V I S I O N   C O N T R O L   R E C O R D
                    [ Sales Manager ]
Alpha Identifier Code
Manufacturer                                Tax _ -     %
Cost calculation factor
List calculation factor
GL Inventory Account Number incl Department ...........
GL Sales Account Number incl Department ................
GL Cost of Sales Account Number incl Department .......
GL Freight & Tire Tax Account incl Department .........
GL Service Cost Account incl Department ................
GL Rental Account Number incl Department ...............

Status:
```

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

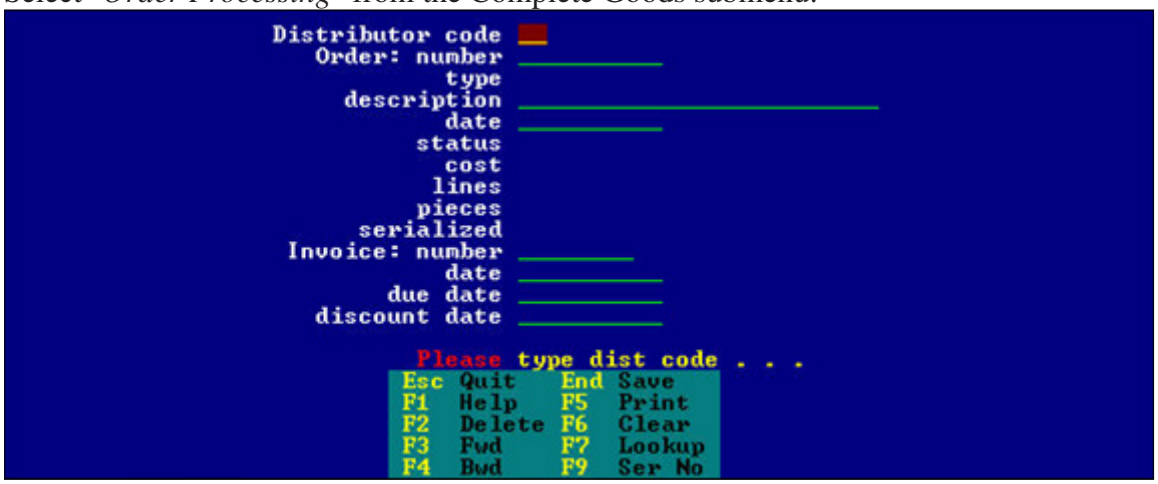
F7 - Calculate figures on the manufacturer chosen at Manufacturer Division screen.

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.

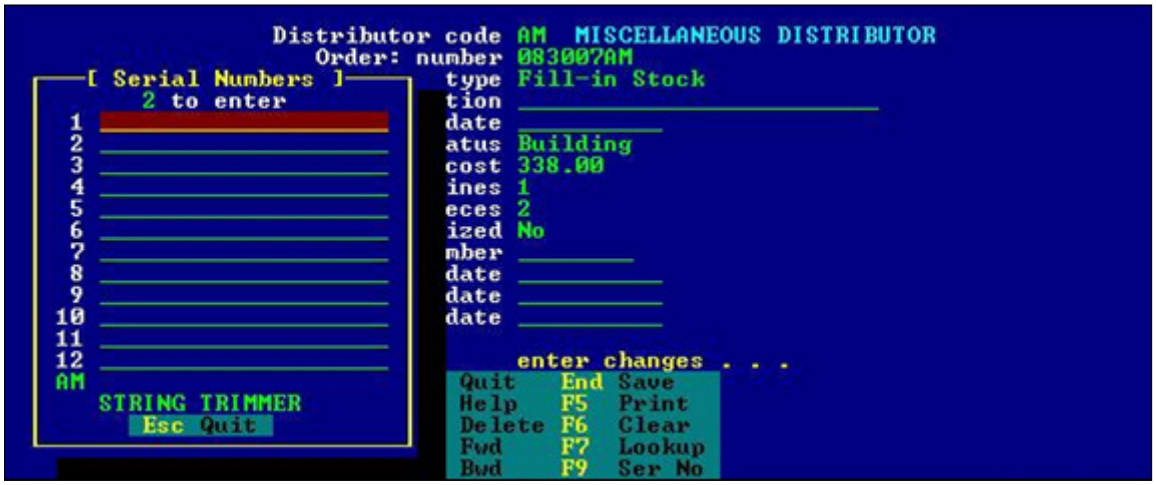
q) Select F5 for the following print/ordering options:

- **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.

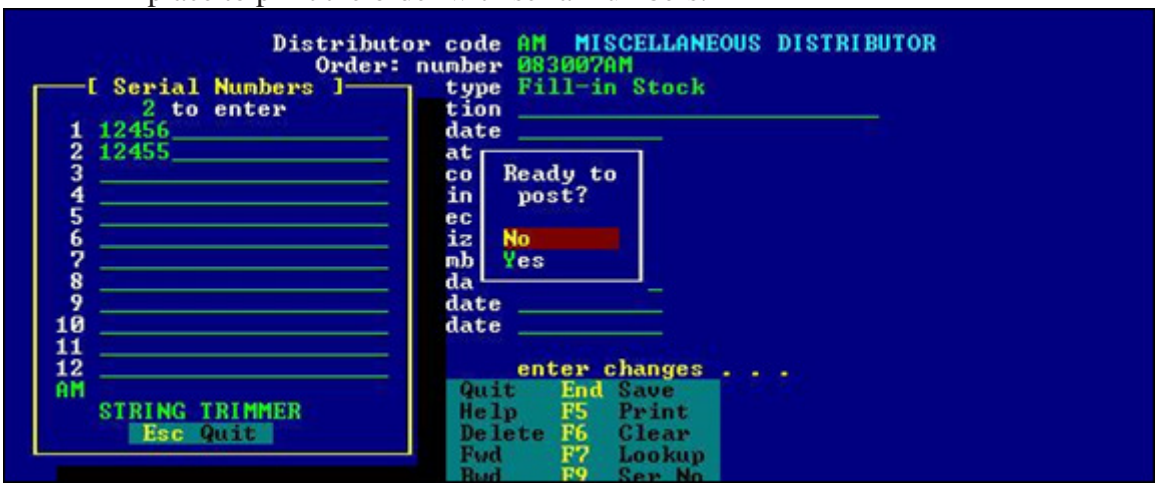
s) Press F9 - the system will prompt you to select if you are now ready to serialize, select "Yes"

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:

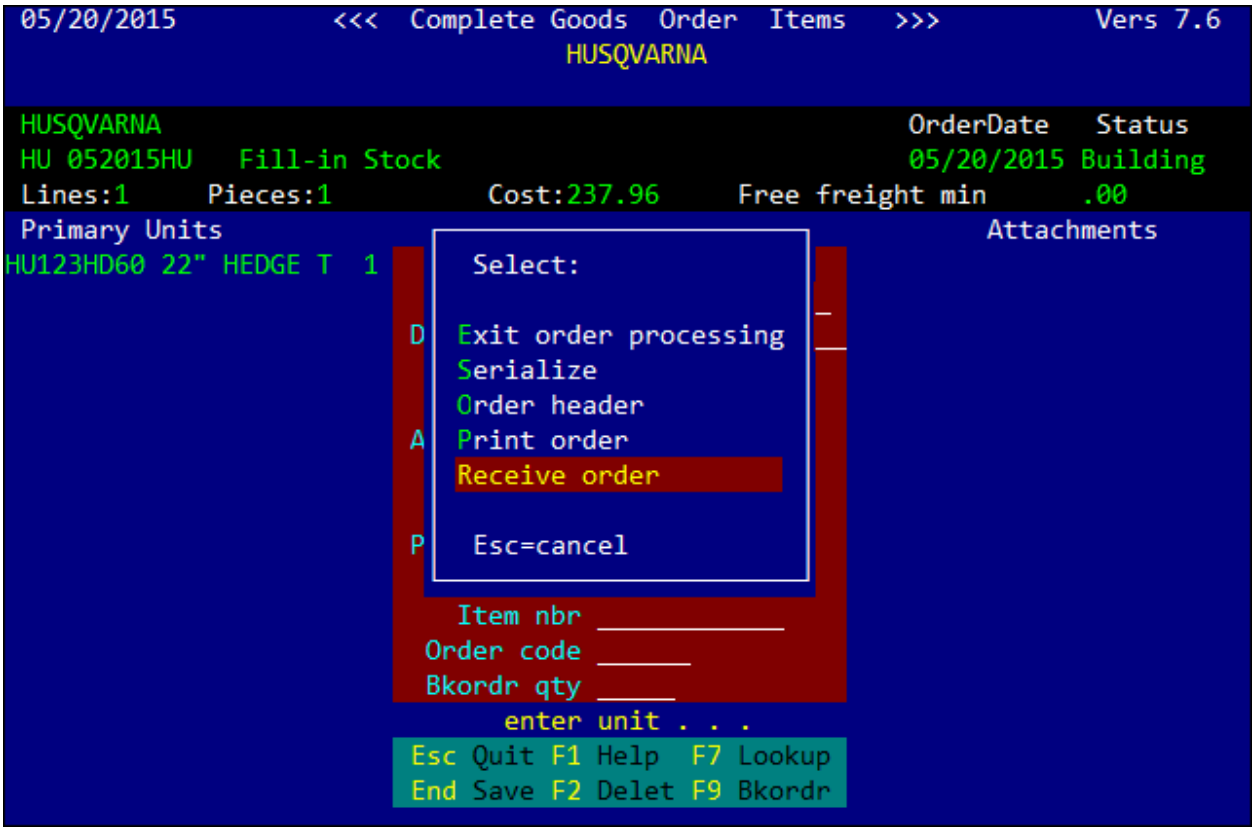
The following instructions are to be used when this module is used for actual order entry and not inventory entry.

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)

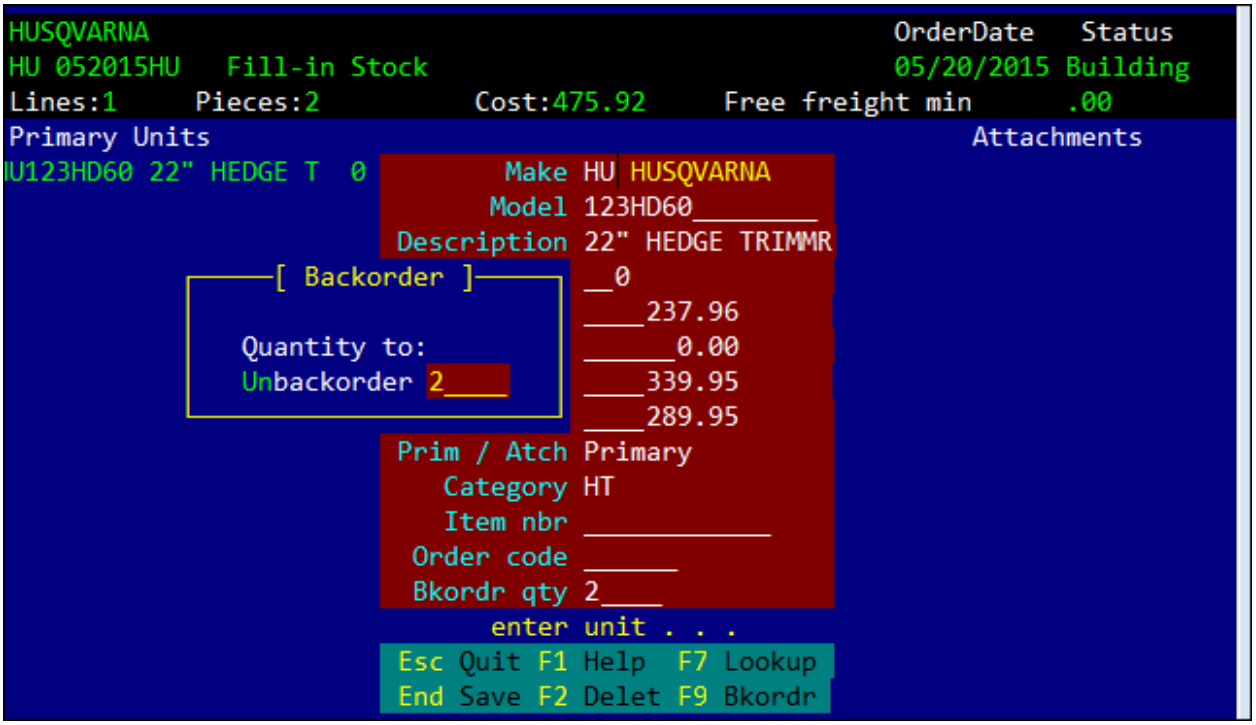
b) The cursor will be at the description field. Press F7 to display screen #2 with order items listed.

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.

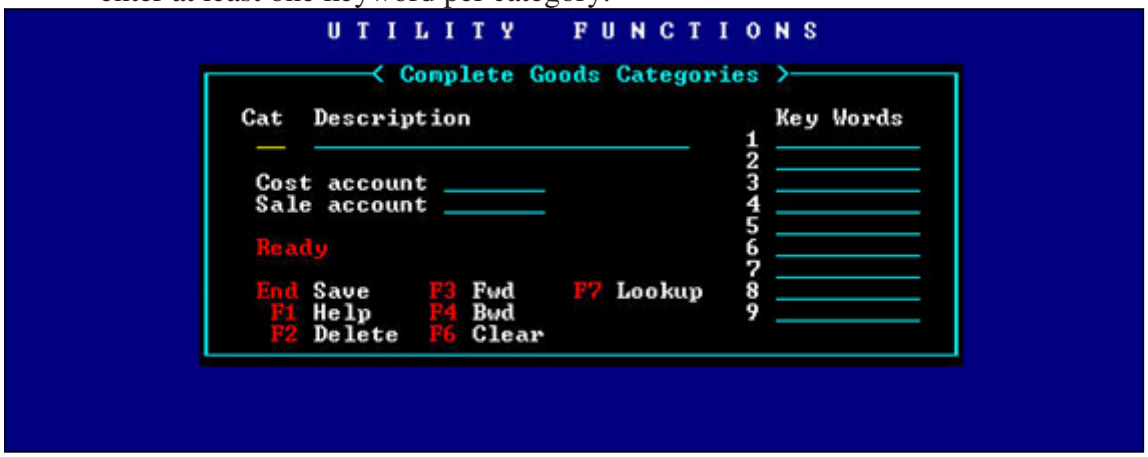
1. **Inventory listing by Manuf.**: displays either by tag number or by manufacturer & make all complete goods in stock.
2. **Owner listing by Manuf.:** displays either by tag number or by manufacturer & make, all complete goods sold including customer information.
3. **Owner listing by customer**: displays 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.