ReadMe - TireMaster Point of Sale 3.8.8

This document includes information about program changes and instructions for completing new settings that have been added in TireMaster POS 3.8.8. If you have questions about this release or need help completing the new settings, log a support call in AtTask at http://asatire.attask-ondemand.com or call TireMaster Support at **800-891-7437**.

Printing This Information

Print this document. You need to refer to the instructions in it while registering the program, validating the database, and completing various settings.

For New Users

If you are a new user who just installed TireMaster POS, refer to the following sections:

For Existing Users

If you are an existing user who just updated to TireMaster POS 3.8.8, refer to the following sections:

Inventory Management

New Feature - Multiple Vendor Part Numbers and Reconciliation Codes

You can assign up to four vendor part numbers to the items in your inventory. For each part number, you can also assign a corresponding reconciliation code. Therefore, both a part number and its reconciliation code need to be for the *same* vendor. For example, if vendor part number 2 is for Michelin, reconciliation code 2 needs to be for Michelin as well.

Note: After updating, existing vendor part numbers and reconciliation codes can be found in the fields for vendor part number 1 and reconciliation code 1.

All of the vendor part numbers assigned to an item can be used for looking up that item. The availability of multiple reconciliation codes also simplifies the process of selling the same item to customers who have national-account or government-support agreements with various vendors. This change is the first step toward allowing the same item to be included in claims that are electronically submitted to multiple vendors via claims-processing applications, including the interface to Goodyear Tire-HQ and the Firestone National Accounts Interface. In future product updates, applications such as these will be redesigned to work with multiple vendor part numbers.

Action Recommended: Assign additional vendor part numbers and reconciliation codes as needed to items that are distributed by multiple vendors or suppliers. For more information, see "Assigning Multiple Vendor Part Numbers and Reconciliation Codes" on page 8.

New Feature - Shop Supplies Redesign

The shop supplies feature has been redesigned. Because of this change, there are significant differences in how shop charges are handled:

- You can base shop charges on the sum of an item's part price (plus FET), an item's labor price, or both.

- Shop charges no longer appear as line items on invoices. Now they're listed in the lower-right corner of completed invoices with the sales tax and totals.

- You can define what the invoice label for the shop charge is called. For example, Shop Charge, Shop Supplies, or another label of your choice is printed on invoices.

- You can exclude shop charges from invoices at point of sale. To remove the shop charge from an invoice, clear the **Shop** check box that has been added to the lower-right corner of the Invoice Entry screen.

Action Required: If you already assess shop charges, you need to adjust some of your shop supplies settings. First, set the controls that define the parts and labor percentages for shop supplies. Then update the items for which you assess shop charges. For more information, see "Updating Shop Supplies Settings" on page 9.

Note: If you have not collected shop charges in the past and want to now, you need to complete *all* of the shop supplies settings. For more information, see "Shop Supplies" and "Setting Up Shop Supplies" in the TireMaster help system or user guide.

New Feature - Inventory List Enhancements

◆ The items on the Inventory List can now be sorted by column. To sort the items, click the column heading of your choice. If the items are arranged from highest to lowest and you'd prefer to see them in the opposite order, click the same column heading again.

◆ The Inventory List includes a new column for manufacturer information. If you don't see the new **MFG** column after updating, scroll to the right. If you want to display the new column in a different position, move it and click **Save Layout**.

New Feature - Labor Included in Inventory History

Labor prices are now included on the Inventory Maintenance screen's **History** tab and the Inventory History screen (accessed by clicking **History** on the Inventory List). Labor prices are available in the sales history and work order views.

Maintenance - Pricing Wizard Issue Resolved

Decimal points can now be included in the numbers typed in the **$ Amount Change** field on the Pricing Wizard's **Modifications** tab.

Maintenance - Receiving Document Screen Lockups

This release addresses an issue that caused the Receiving Document screen to freeze when returning items to vendors. The issue occurred when receiving documents included 26 or more items with negative quantities.

Maintenance - Quantity Issue Addressed

This release addresses an issue that generated Inventory Checkup Report errors. When some invoices were completed, the on-hand and on-reserve quantities of the items sold were incorrectly adjusted.

Maintenance - Screen Enlarged

The Price Level Discounts screen, which lists the price level discounts associated with a price level code, is taller and wider than before.

Point of Sale

New Feature - Search by Invoice Number

You can look up open work orders by invoice number. To look up an open work order in this manner, select **Invoice**. Then type the invoice number in the **Find** field.

New Feature - Product Code Availability

A column for displaying product codes has been added to the Invoice Entry screen. If you cannot see the new column scroll to the right.

Tip: To ensure that product codes are always visible, move the new column closer to the left side of the screen. Your changes are saved automatically.

New Feature - Work Order Total Added to Quote and Estimate Writer

A new check box and a field called **WO and Auth** have been added to the bottom of the Quote and Estimate Writer screen. Depending on whether the check box is selected, the field shows the following:

◆ The sum of the customer's work order total and the authorized total for the selected quote/estimate.

◆ The customer's work order total

> **Note:** If there are multiple work orders for a customer that are all for the same vehicle, the number on the Quote and Estimate Writer is the sum of all of the work order totals instead.

The asterisk (*) included with the value in the **WO and Auth** field indicates that the amount might not always match the total on the work order. Minor fluctuations between the quote/estimate total and the work order total(s) are caused by differences in how sales tax and shop supplies are calculated in each of the program areas.

Maintenance - Workflow Change

When you start a work order and look up the customer by license plate number, TireMaster no longer prompts you to choose a vehicle.

Maintenance - Contact Number Retained

The phone number in the **Contact** field is no longer removed when the **Sold To** button is clicked.

Maintenance - Ending Salesperson Changes Saved

When a different ending salesperson is selected on the Invoice Completion screen, the change is now saved in the database. Similarly, completed invoices now include the correct employee number and ID when the printing of employee numbers is enabled.

Maintenance - Quote and Estimate Writer Changes

This release includes the following changes to the Quote and Estimate Writer:

◆ Printed quotes and estimates now include the notes for inventory items. (The information from the Inventory Maintenance screen's **Notes** tab.)

◆ When items from the Epicor® Integrated Service Estimator™ (ISE) are transferred to the Quote and Estimate Writer, the rows in the checklist (lower) panel are now expanded instead of collapsed. The expanded rows allow you to see both the name for an inspection area and each of the items retrieved from Epicor right away.

◆ When items from an estimate are transferred to a work order and then sold, they're removed from the estimate, the authorize and include check boxes for the related inspection area remain selected, and the status for the applicable inspection area is set to no status. If a *new* estimated is then started for the *same* customer, the original settings for the inspection area are restored.

Sales Tax

New Feature - Another Sales Tax Assessment Option

You can now collect sales tax based on the default tax levels for your store, instead of the tax levels assigned to individual customers. This change helps to ensure that you charge enough, when you need to collect sales tax for multiple government agencies.

Example: You have a store in Minneapolis which charges 10% sales tax. Five percent of it goes to the state and the other 5% goes to the city. Many of your customers, however, are assigned a tax level amounting to 6% sales tax. They're from nearby St. Paul where they pay the same 5% state tax and a city tax of only 1%. By basing sales tax collections on your store's default tax levels, you can automatically charge the customers from St. Paul 10% sales tax instead of 6%, which ensures that the state of Minnesota and the city of Minneapolis both get their share of tax dollars. Although this scenario typically occurs in TireMaster Corporate environments, the option to base sales tax on store levels can also be used in TireMaster Plus and TireMaster POS systems.

Note: If you base sales tax collections on your store's default levels, there are two instances in which this setting is disregarded: 1) When the customer is exempt from paying sales tax, and 2) When you're prompted to choose the customer's tax level at point of sale, because of settings for the customer's customer type.

To define how your sales tax is calculated, set a new system control called **Sales Tax - Use Levels Assigned to Customers**. The default tax levels for your store were already defined when you set the controls **Customer/Site Default Tax Level - Labor** and **Customer/Site Default Tax Level - Parts**. All of these settings are on the **Other** tab on the System Controls screen.

Note: The word *Site* was added to the names for the customer default tax level controls to convey that those settings have two purposes. They define which tax levels are automatically assigned to new customers and which levels are used when tax collections are based on store defaults.

Action Required: Set the new control for defining whether you want to base sales tax collections on your store's default tax levels or the tax levels assigned to individual customers. For more information, see "Defining How Sales Tax is Collected" on page 10.

Reports

New Feature - Vendor Part Number List

With the new Vendor Part Number List, you can see which vendor part numbers are assigned to a selected group of inventory items. This document also includes the corresponding reconciliation codes for each of the vendor part numbers listed. The Vendor Part Number List is on the **Inventory** tab on the Report List.

Maintenance - Mechanic Flat Rate Changes

This release includes the following changes for the Mechanic Flat Rate Report:

- Information on the report can now be grouped by invoice number. You also have the option to exclude gross profit percentages and to print information for each mechanic on a separate page. The customer lookup for this report has changed as well.

- The numbers in the report's **Flat Rate** column are now calculated by multiplying the flat rate amount entered on the work order by the quantity sold. For example, if the time (quantity) to perform a job is 1.5 hours and a $5.00 flat rate is entered on the work order, the value on the report will be 7.50. Previously, the report listed the flat rate amount entered on the work order.

Maintenance - Spacing Adjustment

The amount of space between the items on national account invoices using the Okidata form has been reduced.

Maintenance - Printing Error Eliminated

An error is no longer generated when you try to print a List Editing Report from Customer List Editing and Vendor List Editing.

Users and Permissions

New Feature - Mechanic Filter

You can limit the employees on the User List to mechanics only, by selecting the **Mechanics** check box that has been added to the screen. Because of this change, it'll be easier for you to look up your service technicians when generating reports, scheduling appointments, or assigning them to the items on work orders.

Note: To distinguish service technicians from your other employees, you need to make sure they've been defined as mechanics in their individual user account settings. For more information, see "Adding User Accounts" in the TireMaster help system or user guide.

Maintenance - Permission Enhancement

The permission **Inventory View/Edit Cost** has been changed to further secure your inventory information. Now this permission defines whether users are allowed to see the next cost, last cost, and base cost of items on the Inventory List. In addition to this enhancement, this permission will continue to define whether users can update the cost of items and view and print information about completed receivings.

Third Party Interfaces

New Feature - CARFAX Interface

With the CARFAX Interface for TireMaster, you can retrieve vehicle service and repair history and vehicle year, make, and model information. Access to CARFAX vehicle information is available at no cost to dealers who sign up for the CARFAX Service Network. In exchange, dealers provide CARFAX with information about the work they perform on vehicles. CARFAX then adds this information to vehicle history reports for consumers and other auto repair professionals. This data is transmitted daily at 2:00 AM, 10:00 AM, and 2:00 PM.

Action Recommended: Complete the settings on the CARFAX setup screen that's included in TireMaster. There is no separate installation to run. Completing these settings ensures that you can exchange vehicle information with CARFAX. For more information, see "Setting Up the CARFAX Interface" on page 10.

New Feature - Automated Fitment Guide Updates

Updates for Tire Guide Pro Plus, also known as the Fitment Guide, will run automatically after updating to TireMaster POS 3.8.8. At the beginning of each month, TireMaster will check for updated fitment information and update your system if new data is available. Because of this change, you no longer need to periodically check the TireMaster Support site for fitment updates.

Action Required: When you log in to TireMaster after updating to version 3.8.8, you'll be prompted to register the Fitment Guide. To ensure that you can continue using the Fitment Guide as usual, click **Register** and follow the on-screen prompts.

Registering TireMaster

After installing or updating TireMaster, you have six days to register the program. If you do not register, TireMaster will expire and you won't be able to log in. You can register online if you have an Internet connection.

When registering online, you will be asked for your support ID and password. If you don't have an Internet connection, call TireMaster Support to register manually.

To Register TireMaster

1. If the TireMaster Registration Wizard is not already open, click **Start**. Then select **Programs > TireMaster > Register TireMaster**.

2. Read the information on the **Welcome** tab. Then click **Next**.

3. Read the end-user license agreement. If you agree, select **I accept all of the terms of the preceding license agreement**.

4. Click **Next**.

5. Type your TireMaster customer number and password.

   Tip: If you're a new user, this information is on the address sticker for your CD packet. If you did not receive a CD, or if you are an existing customer who no longer has a number or password, call TireMaster Support.

6. Do one of the following:

   ◆ If you are installing TireMaster for the first time, type your contact information and indicate whether you want to receive billing information, TireMaster newsletters, and software updates by e-mail.

   ◆ If you are updating, review your contact information and e-mail selections. Then make changes, if needed.

   Note: Required information is colored red.

7. Click **Next**. A summary of the contact and e-mail information is displayed on the **Licensing** tab.

8. Verify the information is correct. Then click **Register**. The following message appears:

   "Registration is complete."

9. Click **Finish**. Then click **OK**.

Validating TireMaster

TireMaster needs to be validated before you can access several program areas and complete any transactions. If you're a new user, validate TireMaster *after* you've set up customers, vendors, inventory, employees, and the accounting system (full version only).

To validate TireMaster

1. Click **Start**. Then select **Programs > TireMaster > Validate TireMaster**. The Login screen appears.

2. Type your user ID and password. Then click **OK**. The TM Data Validation screen appears.

3. Click **Validate**.

4. Do one of the following:

    ◆ If errors (red) appear on the TM Data Validation screen, check your settings in the appropriate program area. Resolving warnings (green) is optional.

    ◆ If no errors appear on the TM Data Validation screen, click **Exit**.

5. Repeat steps 1 through 4 until you can run the validation without errors.

Setting Up New Features

To use some of the new features in TireMaster POS 3.8.8, you need to complete a variety of settings.

Assigning Multiple Vendor Part Numbers and Reconciliation Codes

If you have items that are distributed by more than one vendor, you can assign up to four vendor part numbers and reconciliation codes to those items.

Note: The vendor part numbers and reconciliation codes assigned to items in previous versions of TireMaster are placed in the **Vendor Part 1** and **Recon Code 1** fields after updating.

To assign additional part numbers and reconciliation codes

1. Look up the item to which you will assign additional vendor part numbers and reconciliation codes.

2. On the Inventory Maintenance screen, click **Edit**.

3. Assign the vendor part number and reconciliation code for the item's *main* vendor. If the entries in the **Vendor Part Number 1** and **Recon Code 1** fields are already for your *main* vendor, disregard this step.

    a. Type the part number in the **Vendor Part Number 1** field.

    b. Click the **Recon Code 1** field and press ⁓. Then select the reconciliation code for the item's *main* vendor and click **OK**.

        Tip: Because the entry in this field is the only vendor part number displayed on the Inventory List and the Inventory List Editing screen, you should enter the most-frequently used vendor part number here.

        Note: Vendor part number 1 is used in conjunction with reconciliation code 1. Therefore, both part number 1 and reconciliation code 1 need to be for the same vendor. For

example, if this is a Goodyear vendor part number, the Goodyear reconciliation code needs to be entered in the **Recon Code 1** field.

4. Enter up to three additional vendor part numbers and reconciliation codes for the *other* vendors who distribute the item.

   a. To assign a vendor part number, type it in one of the vendor part number fields.

   b. To assign reconciliation codes, click one of the recon code fields and press $\boxed{\sim}$. Then select a reconciliation code from the list and click **OK**.

      Note: Each part number has a corresponding reconciliation code. Therefore, both the part number and its reconciliation code need to be for the *same* vendor. For example, if vendor part number 3 is for Cooper, reconciliation code 3 needs to be for Cooper as well.

5. Click **OK** to save your changes.

6. Repeat steps 1 through 5 to assign multiple vendor part numbers to additional items.

   Note: To see the vendor part numbers assigned to items, generate a Vendor Part Number List. This report is on the **Inventory** tab on the Report List.

Updating Shop Supplies Settings

Because the shop supplies feature has been redesigned, you need to make the following changes to your shop supplies settings:

- Update the description of the shop supplies inventory item.

- Update a pair of system controls.

- Update the items for which you assess shop charges.

   Note: For additional information, see "Shop Supplies" and "Setting Up Shop Supplies" in the TireMaster help system or user guide.

To update shop supplies settings

1. Update the description of the shop supplies item in your inventory, if needed. This description prints on completed invoices. Examples for this description include Shop Supplies and Shop Charge.

2. Update the system controls for shop supplies percentages

   a. From the **Setup** menu, select **System Controls.**

   b. On the System Controls screen, click the **Inventory** tab.

   c. To define the labor price percentage for calculating shop charges, select **Shop Supplies Labor Amount - Percentage (%)** and press **Enter**. Then type the percentage and click **OK**.

   d. To define the parts price percentage for calculating shop charges, select **Shop Supplies Parts Amount - Percentage (%)** and press **Enter**. Then type the percentage and click **OK**.

      Note: Parts price percentages are based on the sum of an item's parts price and FET.

   e. Update the other controls for shop supplies, if needed.

   f. Close the System Controls screen.

3. Update the items for which you assess shop charges, using one or both of the following methods as needed:

   - For a single item, select the **Shop Charge Parts** check box, the **Shop Charge Labor** check box, or both check boxes on the **General** tab of the Inventory Maintenance screen. Repeat for each additional item for which you'll assess a shop charge.
   - For multiple items, select the **Shop Parts** check boxes, the **Shop Labor** check boxes, or both on the Inventory List Editing screen. For more information, see "Updating Information for More than One Item" in the TireMaster user guide.

Defining How Sales Tax is Collected

By setting a new system control, you can define whether sales tax collections should be based on the default tax levels assigned to a store or the tax levels assigned to individual customers. For more information, see "New Feature - Another Sales Tax Assessment Option" on page 5.

Note: In a multi-store TireMaster environment, you need to set the control for *each* store.

To base sales tax collections on a store's tax defaults

1. From the **Setup** menu, select **System Controls**.
2. Click the **Customer** tab.
3. Select **Sales Tax - Use Levels Assigned to Customers** and press **Enter**.
4. Do one of the following:

   - To base sales tax collections on the default parts and labor tax levels for your store, select **No**.

     Note: The system controls for settings your store's default tax levels are **Customer/Site Default Tax Level - Labor** and **Customer/Site Default Tax Level - Parts**.

   - To base sales tax collections on the tax levels assigned to individual customers, select **Yes**.

   Note: In multi-store TireMaster systems, repeat steps 3 and 4 until the control has been set for all sites.

5. Close the System Controls screen.

Setting Up the CARFAX Interface

The CARFAX interface allows you to retrieve vehicle year, make, and model information based on vehicle identification or license plate numbers. The interface is also used to send service and repair information from your shop to CARFAX, so it can be included on vehicle history reports. For more information, see "New Feature - CARFAX Interface" on page 6.

To set up the CARFAX Interface

1. From the **Interfaces** menu, select **Interface Setups**. The Interface Setup screen appears.
2. Click **CarFax Interface**. The CarFax Settings screen appears.
3. Enter the following information:

   - The address for the store web site in the **URL** field.

- ◆ The name of the business contact for your store. By default, this field displays the name of the store contact that was entered on the site setup screen. You can change the name, if needed.
- ◆ The name of the technical contact for your store.
- ◆ The e-mail address that correspondence from CARFAX should be sent to.

4. Update the location name and contact information, if needed.

5. Click **Authorize**.

   Note: The information you entered can be authorized only once. If you need to change the information, contact the CARFAX Service Network Support Team at **888-655-5362** and select **option 2**.

6. Click **OK**.

7. Close the Interface Setup screen.