Data Exchange

With the Data Exchange program, stores running TireMaster can share information and transfer items to each other without being part of a centralized accounting system. This document describes how to set up and use Data Exchange. If you have questions about Data Exchange that are not answered in this document, log a call with TireMaster Support. Visit http://support.tiremaster.com, and click the link for logging support calls or call **800-891-7437**.

Contents

This document includes the following sections.

Data Exchange Overview

With the Data Exchange program, standalone stores running either TireMaster Plus or TireMaster Point of Sale can share data via a process called replication. The types of data that can be shared include the following:

- New inventory items

- Price changes (both fixed prices and A–E price levels)

- Item quantities

- Vehicle history

    Note: Vehicle history from other stores goes back two years and is based on license plate numbers.

- Transactional records for posting to QuickBooks, so a bookkeeper at one store can manage books for the other stores

    Note: These records include normal sale invoices and those with the document types NA, GS, TR, RO, XX, IC, DC, FC, ST, VC, and PO.

The Data Exchange program also includes an interstore transfer process for moving items from one store to another. For these transactions, the selling store creates an invoice for the items being transferred. Then, during the replication process, a receiving document is created for the store that's buying the items. Once the items are delivered, the buying store can receive and price the items.

When you set up the Data Exchange Program, you can define whether stores are allowed to send and receive each of the data types.

Requirements

To use Data Exchange, you need to meet TireMaster version and inventory requirements.

TireMaster Version Requirements

The Data Exchange program is compatible with TireMaster Plus and TireMaster Point of Sale versions 9.1.0 or higher.

Note: Data Exchange can be used in an environment in which some stores run TireMaster Plus and others run TireMaster POS.

Inventory Requirements

To view quantities for existing items, the same product codes must be used by all participating stores. To successfully add and update inventory, the following settings must be the same for all stores:

◆ GL codes

◆ Categories

   Note: At a minimum, an item needs to be assigned a category and a GL code.

◆ Manufacturer codes

◆ Reconciliation codes

◆ Add-On Codes

◆ Color/Spiff Codes

◆ Commission Codes

   Note: The accounts assigned to a GL code can differ from store to store. Likewise, the items assigned to an add-on code can also vary among the stores.

Before You Begin

Before you can use the Data Exchange Program, you need to make various decisions about the data exchange process. Then ASA Support installs the application, and each participating store completes various settings.

Before setups of any kind begin, do the following:

◆ Choose the store from which replication will originate. This store is referred to as the hub, and the remaining stores are called sites.

◆ Provide TireMaster Support with a name for identifying each participating store. This name code will be assigned during the installation and can be used by TireMaster Support for troubleshooting.

- Determine which types of data will be sent and received for each store. Data that can be received includes prices, price levels, new inventory, and receiving documents for transfers. Data that can be sent includes new inventory items and prices and A–E price levels.

- Verify that the same inventory codes are used at all participating stores. For more information, see "Inventory Requirements" on page 2.

Installing the Data Exchange Program

Once you've chosen a hub and identified the names for each of the stores, ASA Support installs the following:

- The Regional Replication program, which allows stores to share data

- The Data Exchange Program, which allows stores to view and update information from other stores

Setting Up the Data Exchange Program

When ASA Support is finished with the installation, *each store* needs to do the following:

- Assign the Data Exchange permission

- Complete the data transmission settings

- Add the general ledger accounts, customer type, and customer records needed for interstore transfers.

- Define the site settings for each of the participating stores

Assigning the Data Exchange Setup Permission

With the Data Exchange Setup permission, you define whether the members of your security groups are allowed to access the setup screen for the Data Exchange Program.

To assign the Data Exchange permission

1. From the **Setup** menu, select **Users & Permissions**. The User List appears.
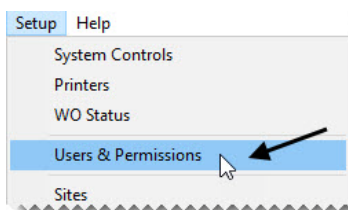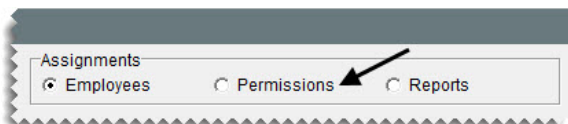

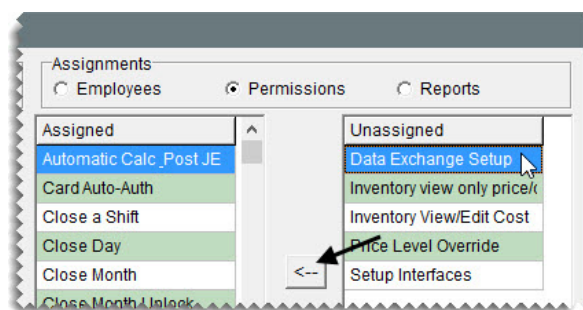2. Click **Security**. The Security Assignments screen appears.

3. Make sure **Groups** is selected. Then select the name of the group to which you want to assign the permission.
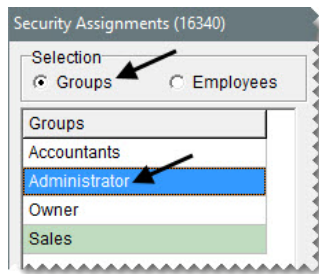
4. Select **Permissions**.

5. Select **Data Exchange Setup** from the list of unassigned permissions, and click [<--].

6. To assign the Data Exchange permission to another group, repeat steps 3 through 5.

7. Close the open screens.

Completing the Data Transmission Settings

With the data transmission settings, you define the following:

- Which types of data a store will receive

- Whether a store is allowed to set prices

- Whether a store is allowed to add new items

To complete the data transmission settings

1. From the **Interfaces** menu, select **Interface Setups**. The Interface Setup screen appears.
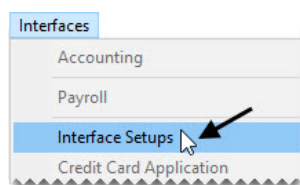
2. Click **Data Exchange**. The Data Exchange screen appears.
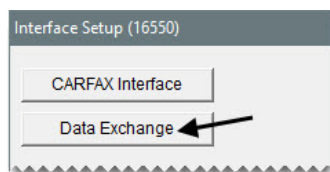
3. Click **Setup**.
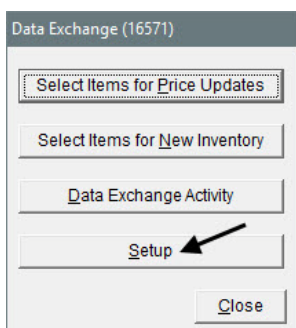
4. Select or clear the check boxes as needed.

    Note: When the check boxes for setting prices and adding inventory are cleared, the corresponding buttons on the Data Exchange screen are disabled.

5. Click **OK**.
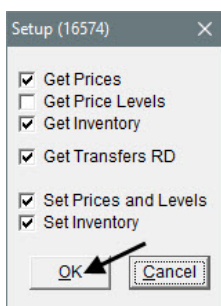
6. Close the open screens.

Preparing for Interstore Transfers

Stores participating in the Data Exchange Program can transfer items to each other through an interstore transfer process. For these transfers to occur, you need a customer record for each of the stores to whom you will sell items. To classify the stores as interstore transfer customers, assign a customer type for interstore transfer customers. If this customer type does not exist, add it to TireMaster.
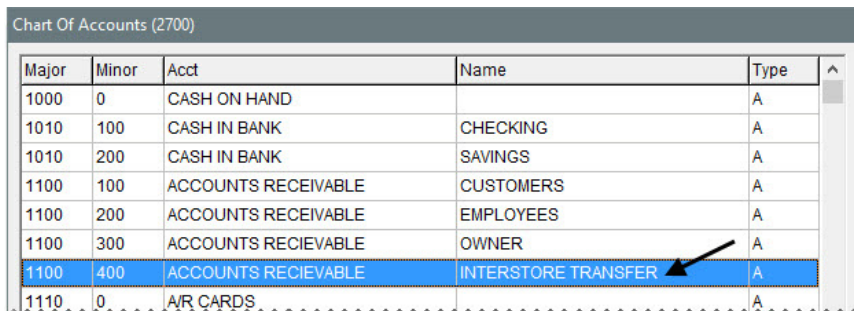
Note: Assigning the interstore transfer customer type does not occur when you initially create customer accounts for stores. It happens later, after various site settings have been completed.

Depending on how interstore transfer activity should post to the general ledger, you might also need to set up additional general ledger accounts.

Adding Interstore Transfer Accounts
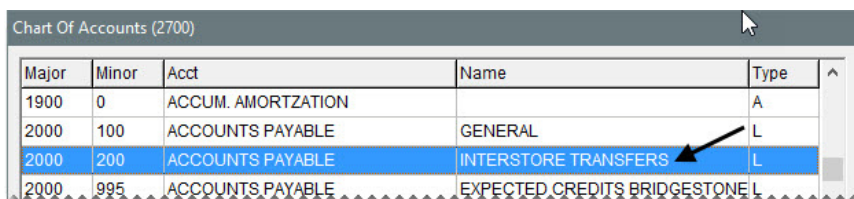
Add accounts for tracking interstore activity to the chart of accounts as needed. Accounts you might want to add include the following:
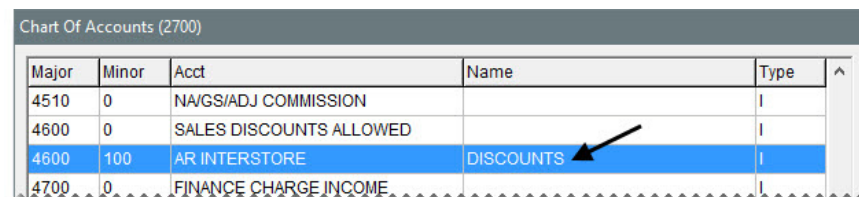
- An interstore transfer AR account

Major	Minor	Acct	Name	Type
1000	0	CASH ON HAND		A
1010	100	CASH IN BANK	CHECKING	A
1010	200	CASH IN BANK	SAVINGS	A
1100	100	ACCOUNTS RECEIVABLE	CUSTOMERS	A
1100	200	ACCOUNTS RECEIVABLE	EMPLOYEES	A
1100	300	ACCOUNTS RECIEVABLE	OWNER	A
1100	400	ACCOUNTS RECIEVABLE	INTERSTORE TRANSFER	A
1110	0	A/R CARDS		A

Chart Of Accounts (2700)

- An interstore transfer AP account

Major	Minor	Acct	Name	Type
1900	0	ACCUM. AMORTZATION		A
2000	100	ACCOUNTS PAYABLE	GENERAL	L
2000	200	ACCOUNTS PAYABLE	INTERSTORE TRANSFERS	L
2000	995	ACCOUNTS PAYABLE	EXPECTED CREDITS BRIDGESTONE	L

Chart Of Accounts (2700)

- An interstore transfer AR discount account.

Major	Minor	Acct	Name	Type
4510	0	NA/GS/ADJ COMMISSION		I
4600	0	SALES DISCOUNTS ALLOWED		I
4600	100	AR INTERSTORE	DISCOUNTS	I
4700	0	FINANCE CHARGE INCOME		I

Chart Of Accounts (2700)

For information about adding accounts to your general ledger, refer to the TireMaster help system or user guide.

Note: In TireMaster POS 9.2.0, you can access the Chart of Accounts setup screen an add GL accounts on your own. For TireMaster POS 9.1.0, however, you will need assistance from ASA Support to add GL accounts.

Creating Interstore Transfer Customers

Before you can transfer items to another store, you need to create a customer record for the store that will be buying items from you. This type of customer is referred to as an interstore transfer customer.

When you create interstore transfer customers, ASA recommends including a pair of hyphens (or a symbol) at the beginning of each store name so they are grouped on the Customer List. (**Example:** --Bob's Downtown Tire, --Round Tire Service, and --Cheetum's Tire and Wheel.) For interstore transfers, you'll also disable various payment settings.
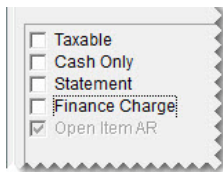
To create an interstore transfer customer

1. Click **Customers**. The Name/Lookup Entry screen appears.

2. Click **Cancel**.

3. Click **Add** to re-open the Name Lookup/Entry screen in add mode.

4. Type the name of the interstore transfer customer you want to add preceded by a pair of hyphens or a symbol. Then click **OK**.

5. Clear the **Taxable**, **Cash Only**, **Statement**, and **Finance Charge** check boxes.

6. To save the new interstore transfer customer, click **OK**.

   Note: Once you assign the interstore transfer customers to the corresponding sites, you'll update their customer records by assigning the customer type for interstore transfers.

Defining Site Settings

Defining site settings allows you to do the following:

◆ Identify the customer record for another store. This customer record is used when selling items to that store via an interstore transfer.

◆ Indicate how quantity information for another store is shown on the Inventory List. You can define a name and the position for that store.

   Note: Quantity information for the other stores is shown from left to right toward the bottom of the Inventory List.

To define site settings

1. From the **Setup** menu, select **Sites**. The Site List appears.
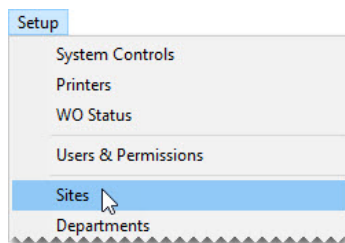
   Note: Your store is site 1.

2. For each store on the list, do the following.

    a. Select the store name and click **Edit**. The Site Identification Maintenance screen appears.
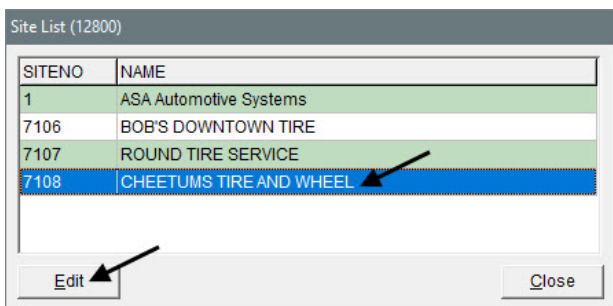
    b. Type a name for identifying the store in the **Disp Name** field.

    c. Select the **Active** check box.

       Note: This check box must be selected to display the store's quantity information on the Inventory List.

    d. In the **Sort Order** field, type the number that corresponds with the position in which you want to show the selected store's quantities. Other store quantities are listed toward the lower-left corner of the Inventory List. **Example:** If the store should be listed second, type **2**.

    e. Click **Customer**, and look up the customer record that was created for the store.

    f. Click **OK**.
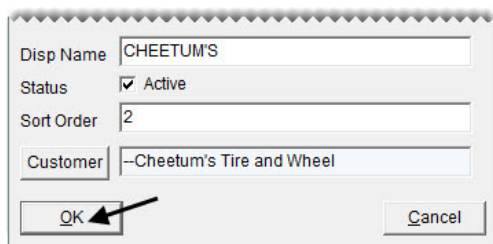
3. When you've defined inventory display settings for all of the stores, close the Site List.

Creating the Interstore Transfer Customer Type

The interstore transfer customer type ensures that the sales to another store are handled properly. Typically, the letter U is used to identify the interstore transfer customer type. Once you've created the type, indicate that it is the default customer type for interstore transfers by assigning it in System Controls.

To create the interstore transfer customer type

1. From the **Customers** menu, select **Types**. The Customer/Vendor Type List appears.
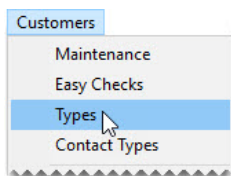
2. Click **Add**. The Customer/Vendor Type Edit screen appears.
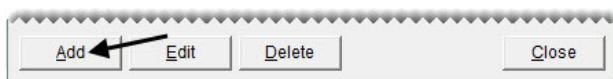
3. For the type code, type the letter **U** (or another letter of your choice).

4. Type a description for the new customer type.

5. Assign general ledger accounts to the customer type.

6. Make sure that none of the check boxes near the bottom of the screen are selected.

7. To save the new customer type, click **OK**.

8. Close the Customer/Vendor Type List.

9. Assign the new interstore transfer customer type in System Controls.

   a. Select **System Controls** from the **Setup** menu.
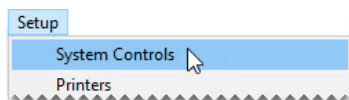
   b. Do one of the following:

      ◆ If you're running TireMaster Plus, click the **Enterprise** tab.
      ◆ If you're running TireMaster POS, click the **Customer** tab.

   c. Select **Interstore Transfers - Customer Type** and press **Enter.**

   d. Choose the customer type you created for interstore transfers from the list that appears, and click **OK**.

10. Close the System Controls screen.

Assigning the Interstore Transfer Customer Type

Once the interstore transfer customer type has been created and assigned in System Controls, you need to assign it to each store to which you'll sell items. Although you can assign the type to individual customers, it's more efficient to use Customer List Editing.

To assign the interstore transfer customer type

1. From the **Customers** menu, select **List Editing**. The Customer Range Lookup screen appears.
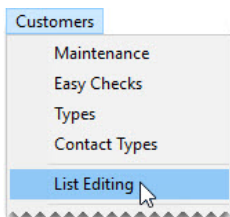
2. In the **Name** field, type the pair of hyphens (or the symbol used for grouping interstore transfer customers). Then click **OK**. The Customer List Editing screen appears.
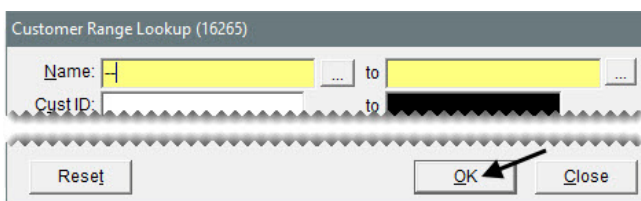
3. For each customer, click ⋯ and select the interstore transfer customer type (typically U) from the list that appears.
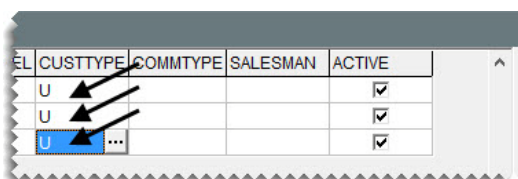
4. Close the open screens.

Using the Data Exchange Program

You can perform a variety of tasks with the Data Exchange Program.

Viewing Quantities from Other Stores

Quantity information for other stores is available on the Inventory List, in the lower-left section of the screen, above the A–E price level fields (Figure 1). An item's quantity information from another store is available when the product code for your store matches the product codes used by the other stores.

Figure 1: Quantity Information from Other Sites

Tip: Update the layout of the Inventory List so the **Available** and **Other Sites** columns are next to each other. When these columns are side-by-side, you'll be able to easily compare the available quantities at your site to the total available quantities at the other stores. To move an Inventory List column, click the column heading. When the thick line appears, drag the column to the new position. Then click **Save Layout**.

Adding Items

With Data Exchange, items from one store can be added to the inventory at other participating stores. To add items in this manner, **Set Inventory** must be enabled for the store sending the inventory information and **Get Inventory** must be enabled at the other stores for them to receive the items.

Note: Adding items creates inventory records at the stores retrieving the data. It does not, however, add prices or quantities for those locations.

To add items with Data Exchange

1. At the store sending item information, add new items. Existing item information can be sent as well.

2. At the store sending item information, choose and send the items.

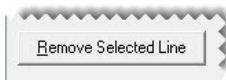   **a.** From the **Interfaces** menu, select **Interface Setups**.
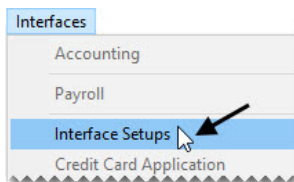
b. Click **Data Exchange**.
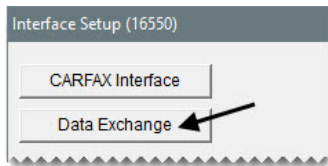
**c.** Click **Select Items for New Inventory**. The Custom Inventory Lookup screen appears.
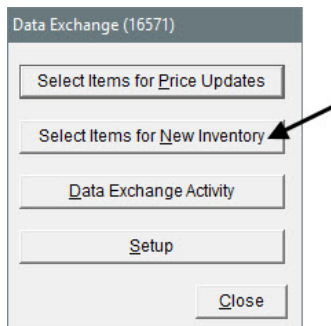
d. Look up the items you want to send. The Selected Items screen appears.

e. If there is an item on the list you don't want to send, select it and click **Remove Selected Line**. For additional items, repeat as needed.


**f.** Click **OK**. The Selected Items screen closes.

g. Close the remaining open screens.

3. Allow a replication cycle to occur, and allow the inventory-update process to run. For more information, see "Replication Process" on page 20.

4. At each store receiving the new item information, verify the transmission was successful.

a. From the **Interfaces** menu, select **Interface Setups**.
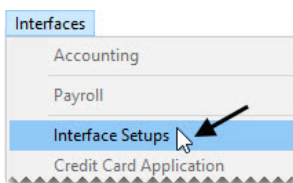
b. Click **Data Exchange**.
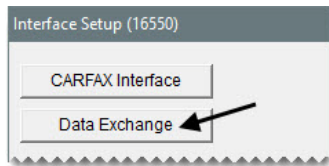
c. Select **Data Exchange Activity**. The Data Exchange Activity screen appears.
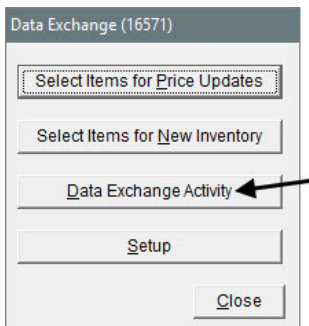
d. Make sure **New Inventory** and **Successful** are selected. If the sent items are listed, they've been added to your inventory. If the items are not listed, select **Current Errors** and refer to the information in "Troubleshooting" on page 18.
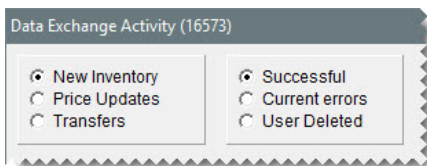

5. Close the open screens.

Updating Prices

When one store updates prices for items, that information can be sent to the other stores. Depending on a store's settings, both prices (base price, last cost, parts and labor) and price levels can be shared.

To update prices with Data Exchange

1. At the store sending price information, make sure the prices have been set for the items whose information you're going to share.

2. At the store sending the price information, choose the items and send the prices.

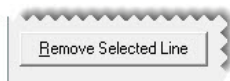a. From the **Interfaces** menu, select **Interface Setups**.
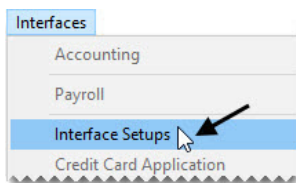
b. Click **Data Exchange**.
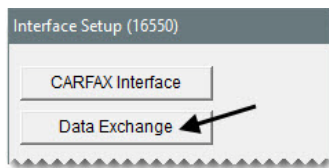
**c.** Click **Select Items for Price Updates**. The Custom Inventory Lookup screen appears.
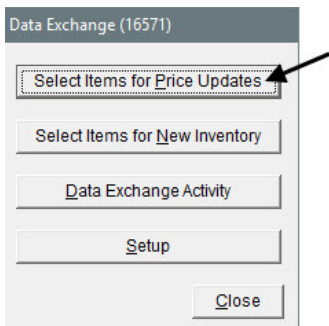
d. Look up the items for which you want to send price information. The Selected Items screen appears.

e. If there is an item on the list whose information you don't want to send, select it and click **Remove Selected Line**. Repeat as needed.
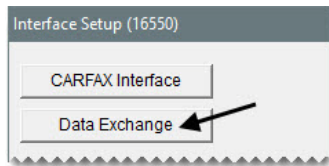

**f.** Click **OK**. The Inventory List closes.

3. Allow a replication cycle to occur, and allow the inventory-update process to run. For more information, see "Replication Process" on page 20.

4. At each store receiving the updated prices, verify the transmission was successful.

a. From the **Interfaces** menu, select **Interface Setups**.
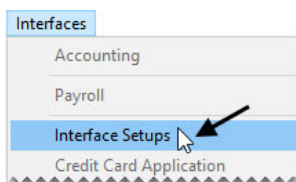
b. Click **Data Exchange**.

c. Select **Data Exchange Activity**. The Data Exchange Activity screen appears.
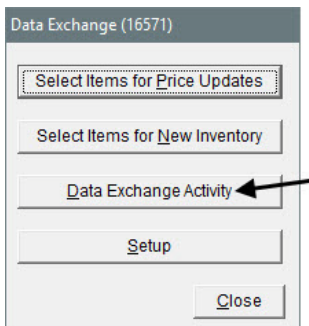
d. Make sure **Price Updates** and **Successful** are selected. If the sent items are listed, they've been added to your inventory. If the items are not listed, select **Current Errors** and refer to the information in "Troubleshooting" on page 18.

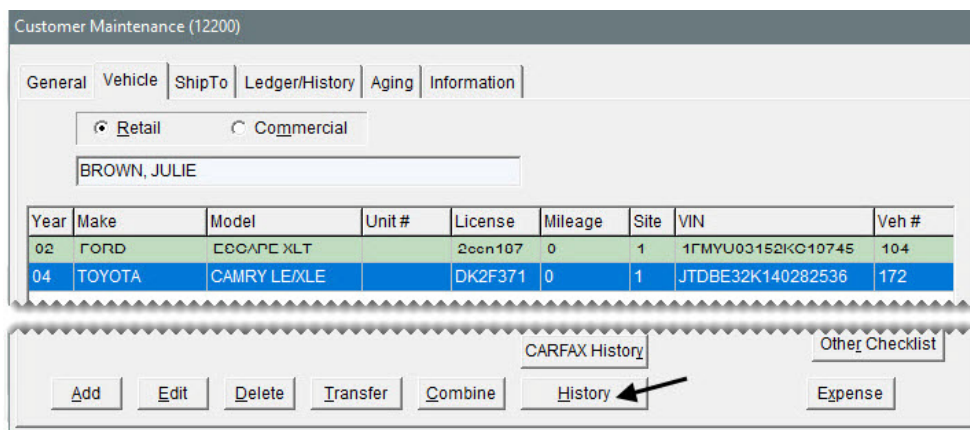**5.** Close the open screens.

Viewing Vehicle History from Other Stores

With Data Exchange, you can view vehicle history from the other stores. Vehicle history is available when the license plate entered at your store matches the license plate entries at the other locations.

To view vehicle history from other stores

1. Look up or add the customer as a standalone operation or when you start a work order. A list of the customer's vehicles appears.

2. Select the vehicle, and click **History**. The Vehicle History screen appears and displays invoice detail from all stores that have previously worked on the vehicle.

3. If you need to limit the history to your store, select the **This Site Only** check box.

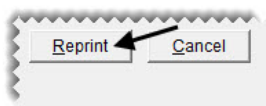4. Do one of the following as needed:

   ◆ For a hard copy of a historical invoice created at your store, select one of the items that was on that invoice and click **Reprint**.

   ◆ For a list of items sold on an invoice from another store, select one of those items and click **Reprint**.

5. Close the open screens.

Selling Items to Another Store

The interstore transfer process allows one store to sell items to another store. For interstore transfers, the selling store creates a work order for the store that's buying the items. Once the invoice is completed and the data has replicated, a receiving document is available at the purchasing store. To successfully sell items from one store to another, the item's product code must exist at both stores.

Note: When an item is added to an interstore transfer invoice, your cost for that item is used as its selling price.

To sell items to another store

1. At the selling store, do the following:

   a. Start a work order, and look up the customer record for the store that has requested the transfer.

   b. Add items to the work order.

c. Complete the invoice. It will be handled as a charge.

2. At the purchasing store, do the following:

a. Open the PO System and locate the receiving document. The vendor is the store that transferred the items.

> **Note:** The reference number for the receiving document includes the document number for the invoice on which the items were sold and the site number for the store that sold the items.

**b.** Open the receiving document. Then receive and price the items.

Troubleshooting

If you don't see new inventory, updated prices, or an interstore transfer receiving document that you're expecting, refer to the following information to research the issue.

Troubleshooting New Inventory Issues

If items sent from another store were not added to your inventory, refer to the following information to determine why.

◆ Make sure the Data Exchange settings for your store allow you to add items that were created at another location. For this to happen, the **Get Inventory** check box needs to be selected on the Data Exchange setup screen.
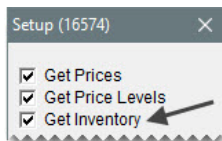
◆ Sometimes a lag in the replication process occurs. Make sure **New Inventory** and **Current Errors** are selected and click **Reprocess All**. Then select **Successful** and see if the items were added during this attempt.
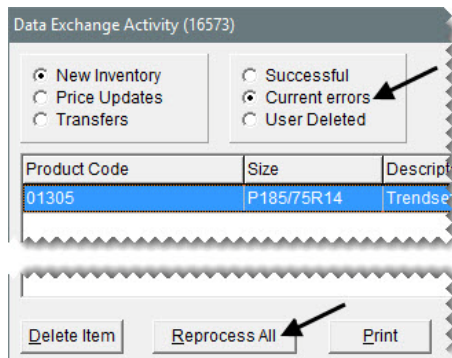
◆ Make sure **Current Errors** is selected. Then verify that the manufacturer code, GL code, category, add-on code, reconciliation code, color/spiff code, and commission code listed match the codes used by your store. If one or more codes do not match, the items are not added.


Note: When you add items to TireMaster, the GL code and category fields cannot be blank. If the remaining codes are unassigned, those blank fields do not affect whether the items are successfully added at another store via the Data Exchange process.

In this scenario, you need to decide whether the mismatched codes need to be added at your store or if the sending store is using codes that are not consistent with those used by the other participating stores.

Note: If you add a new code, you will likely need to update your existing inventory. **Example:** If your Michelin reconciliation code is MC but the sent items are assigned the code MI, some of your Michelin items will be assigned to code MC and others will be assigned MI.

Troubleshooting Price Update Issues

If prices at your store were not updated with price information from another location, make sure the Data Exchange settings for your store allow you to implement prices that were set at another location. Depending on whether parts prices or price levels should be affected, make sure the **Get Prices** check box, the **Get Price Levels** check box, or both are selected on the Data Exchange setup screen.
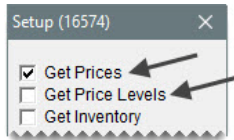

Troubleshooting Interstore Transfers

If another store has sent items to your store but there is not a receiving document for the transfer, refer to the following information to determine why.

◆ Make sure the Data Exchange settings for your store allow you to receive interstore transfers. For this to happen, the **Get Transfers RD** check box needs to be selected on the Data Exchange setup screen.
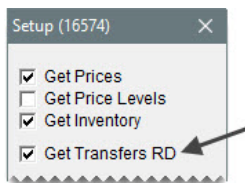
◆ Check the Data Exchange Activity screen for interstore transfer errors. Make sure **Transfers** is selected and click **Current Errors**. If any transfers are listed, attempt to process the transfers manually by clicking **Reprocess All**.
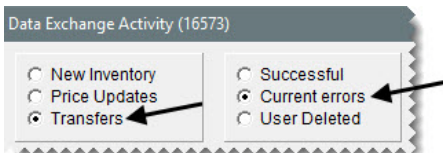
◆ Make sure your inventory has product codes that match the product codes of the transferred items. The same product code must exist at both stores to successfully transfer items. If your store doesn't have a product code for a transferred item, add an item to your inventory with that product code or update the product code for an existing item.

Generating Data Exchange History Reports

The Data Exchange History Report (Figure 2) is generated by clicking **Print** on the Data Exchange Activity screen. This document lists the site number, system-generated part number, and product code for new inventory items and prices updates. The prefix 1 identifies new inventory and the prefix 2 identifies price updates.

Figure 2: *Data Exchange History Report*

Replication Process

As soon as replication is finished, inventory quantity, site, and history information is available.

For new inventory, pricing, and transfer information to become available, an additional inventory-update process needs to occur. It runs every ten minutes between 4:00 a.m. and 7:00 p.m.