ReadMe - TireMaster Point of Sale 9.1.0

This document includes information about program changes and instructions for completing new settings that have been added in TireMaster POS. If you have questions about this release or need help completing the new settings, log a support call in Service Cloud at https://asatire.force.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, refer to the following sections:

Point of Sale

New Feature - Deposits

Payments customers make toward purchases can now be processed as deposits at point of sale. To record a deposit, start a work order and add items to it. Then click **Deposit** and define the payment amount and method. Depending on the payment type, the deposit is added to the day-end cash, check, or payment card totals. That deposit and any subsequent deposits reduce the amount the customer owes when the sale is completed. The amount of a deposit needs to equal or exceed a percentage of the invoice total and meet a minimum dollar amount. Deposit activity is tracked with its own general ledger account.

Action Required: Before you take deposits at point of sale, you need to add a general ledger account for tracking deposits and set three system controls. For more information, see "Preparing to Take Deposits" on page 9.

Maintenance - Color Codes Added to Work Order List

Color codes assigned to customers are now displayed on the Open Work Order List, in the column for customer names.

Maintenance - Invoice Notes Saved

When you reverse an invoice and create a new work order, the notes from the original invoice are now added to the new work order.

Maintenance - Invoice Payment Card Changes

Database entries for payment card expiration dates no longer include slashes. This change ensures that month and date information is not lost when sales are completed, and it affects your printed sale invoices. If you use a custom form, expiration dates are formatted in a different manner (for example 12–16), and the regular form no longer includes expiration dates.

Maintenance - Quote Addition

When a UTQG rating is assigned to a tire, that information is now included on printed quotes.

Sales Tax

Maintenance - Processing Change

This release addresses a sales tax processing issue that resulted in posting errors. The issue occurred because the effective dates for tax rates are used in two database tables; however, in some scenarios only the dates from one table were included in sales tax calculations.

DOT Interface

New Feature - Bypass Control

You can define whether recording National Highway Traffic Safety Administration (NHTSA) tire identification numbers is mandatory. When the new system control **DOT Interface - Entry Bypass** is set to No, entering the numbers is required. When the control is set to Yes, you can disregard entering DOT numbers.

Action Required: If you use the DOT Interface, set the new control. For more information, see "Setting the DOT Bypass Control" on page 10.

Maintenance - Workflow Change

You're no longer prompted to enter NHTSA tire identification numbers when printing work orders, because the DOT Information screen appears during the invoice completion process now.

Maintenance - System Control Renamed

The system control for activating the DOT Interface has been renamed. **Work Orders - Interface DOT** is now called **DOT Interface - Enabled**, because the DOT Interface is no longer used during the work order printing process.

Customers and Vendors

New Feature - Credit Memos

The ability to issue customer credit memos is available now. If a customer is due a refund and requests to have the credit put on his or her account, in lieu of a check, creating a credit memo adds the credit and generates a receipt. To issue a credit memo, click the **Credit Memo** button on the Open Work Order List or the **Ledger/History** tab on the Customer Maintenance screen.

Note: The addition of credit memos also affects the TireMaster Casing Manager. When you owe customers credits for retreads, the Casing Manager will generate credit memos instead of account adjustment documents.

New Feature - Customer Since Field

A new field that allows you to select the date when a customer started as a customer has been added to the Customer Maintenance screen. When adding a new customer, the date defaults to the current date.

New Feature - Document Search

A document search field has been added to the following screens: Customer Maintenance **Ledger/History** tab, Open Item Ledger, ROA Unapply, Vendor Maintenance **Ledger/History** tab, and Payment Editing. Depending on the screen, the number of documents displayed will be narrowed down to only those that match the reference number, PO number, check number, or document amount entered in the **Search** field.

Maintenance - Larger E-mail Addresses Allowed

The **Number/E-Mail** field used on the Customer Maintenance, Vendor Maintenance, and Add/Edit Contact screens now holds up to 128 characters.

Vehicles

New Feature - myCARFAX Registration

A registration tool for myCARFAX®, a mobile app, is now included in TireMaster's CARFAX Interface. Customers who sign up for myCARFAX will receive service reminders and a list of shops they've previously visited, including yours. A perk of signing up customers for myCARFAX is that your store is listed as their favorite shop on those service reminders. Before you register customers for myCARFAX, you must receive verbal authorization from them.

Action Recommended: If you want to offer myCARFAX registration to your customers, you need to accept the myCARFAX end user license agreement. For more information, see

New Feature - Price Levels for Government-Support

Price levels can now be used to define selling prices for government-support customers. Because of this change, the **Price Levels for National** check box on the customer type setup screen has been renamed. It is now called **Price Levels for National/GS**.

Action Recommended: If you're going to use this feature, define that price levels can be used by government-support customers. Then assign price levels to individual government-

support customer accounts as needed. For more information, see .

Maintenance - Expected Credit Correction

Invoices that included both returns and adjustments now show the correct expected credit calculations on the National Credits screen for the adjusted items.

Inventory

New Feature - Price Matrix

A new tool for pricing items is available in this release. With the new Price Matrix, an item's selling price is updated by calculating a markup based on where the item's cost (the amount the vendor charges you) falls within a set of ranges. For example, you could use a matrix to calculate a 30% markup for items that cost between $1 and $100 and a 20% markup for items that cost between $100 and $200. Matrix price changes are calculated based on an item's next cost. When there is no next cost for an item, its last cost is used instead.

Action Recommended: Set up one or more price matrixes and assign them to items. For more information, see .

New Feature - Enhanced Pricing Wizard

The Pricing Wizard has been revamped. The most notable enhancement is the ability to perform three types of changes, called operations, to an item or group of items in a single session. For example, you could update the cost information, assign a factor, and recalculate the selling prices for a group of items without having to close and reopen the Pricing Wizard between each task.

In addition to performing multiple operations, you can now use the Pricing Wizard to assign the following to items:

- Stocking levels (both minimum and maximum)
- Factors
- Color/Spiff Codes
- Price Matrixes (for more information, see .)

The Pricing Wizard Report has been rewritten to correspond with the new operations available in the Pricing Wizard. Now it lists only the prices, settings, or both that you plan to change. Previously, the report included columns for prices and settings that were not being updated.

New Feature - Recalculate Button

A **Recalculate** button is now available on the Site Prices and Quantity screen. When you update an item's cost, factor, or both, clicking the new button updates the item's selling price immediately. Therefore, you no longer need to run the Pricing Wizard for the price change to take effect.

New Feature - Core Item

A new feature allows you to track high-value cores as inventory items. To do this, set up one or more core items and link them to parent items using the new **Core Item** field that has been added to the Inventory Maintenance screen. When a core item is assigned to a parent item, you can invoice or

receive the parent item and automatically put the linked core item on the document created during the sale or receiving.

⌐▣ **Action Recommended:** To use this feature, you need to set the **Enable Core Item Field** system control, set up one or more inventoriable core items in inventory, and use the **Core Item** field on the Inventory Maintenance screen to link the core item. For more information, see "Preparing to Track Core Items in Inventory" on page 12.

New Feature - Core Cost

A **Core** column has been added to the Purchase Order and Receiving Document screens. This addition allows you to enter the core cost charged by a vendor for an item when it's ordered or received into inventory. When the core cost is included on a receiving, it updates the new **Core Cost** field on the Inventory Maintenance screen, and it's shown when the item is added to a work order. Unlike core items (previously mentioned), entering an item's core cost does not affect the inventory subledgers.

⌐▣ **Action Recommended:** To use this feature, you need to set the **Track Cores** system control and assign the core cost to inventory items as needed. For more information, see "Preparing to Use Core Costs for Inventory Items" on page 13.

Maintenance - Category Selection

When you click the **Category** field on the Inventory Maintenance screen and press ⌐≈⌐, the category that is assigned to the item is selected by default on the list that opens.

PO System

New Feature - Receiving & Pricing at POS

Nonstock items can now be received and priced at point of sale. When you add a nonstock item to a work order, open the Option Cost screen, enter the item's cost, and look up the vendor. Then click the new **Receive and Price** check box, and click **OK**. When the Receiving Document screen appears, you can receive the item or receive and price the item.

Maintenance - Receiving Document Pricing

Changes in this release will prevent interruptions that sometimes occurred during process of pricing receiving documents. When this issue occurred, receiving documents had to be processed manually with the assistance of TireMaster Support.

System Administration

New Feature - TM Support Tool Icon

With the TM Support Connect tool, TireMaster Support technicians can quickly access your computer to diagnose and resolve problems. Upon installing or updating to TireMaster 9.1.0, you will see a **TM Support Install** icon on the server desktop. Use this icon to install the TM Support Connect tool on the server. Then use the installer in the TireMaster **Apps** folder to install the support tool on each TireMaster workstation.

⌐▢ **Action Required:** Install the TM Support Connect tool. For more information, see "Preparing to use the TM Support Connect Tool for Remote Support" on page 13.

System Controls

New Feature - Additional Controls

The following system controls are now available:

- **Vehicle Year Format** lets you define whether vehicle years are added to customer records as two digit (such as 16) or four digit numbers (such as 2016). This new control affects vehicles chosen from the Standard Vehicle Selection screen, not those entered manually. If you use CustomerLink, the four digit format prevents issues that can occur when TireMaster data is extracted for marketing purposes. This setting is on the **Customer** tab.

- **POS Message - Disable Below Cost Message** lets you define whether a message appears at point of sale when an item's price is changed to an amount that's less than its cost. This setting is on the **Other** tab.

- **Show Recalculate/Update EDL Message** lets you define whether confirmation messages appear when you update an item's factor-based price by clicking **Recalculate** on the Site Prices and Quantity screen. This setting is on the **Inventory** tab.

- **DOT Interface - Entry Bypass** lets you define whether recording tire identification numbers is required. For a description, see "New Feature - Bypass Control" on page 2.

- **Enable Core Item Field** lets you define whether core items can be associated with inventory items. For a description, see "New Feature - Core Item" on page 4.

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⌐▢ **Action Required:** Set the new system controls as needed for your business. For more information, see "Setting the New System Controls" on page 14.

Security

New Feature - Price Level Override Permission

The new permission **Override Price Level** allows you to manually change an item's parts price (by typing a different amount) when the item is associated with the customer's assigned price level. For example, Tire X is associated with Price Level 1, which is assigned to customer Ted Smith. When you put Tire X on a work order for Ted Smith and type a different price, the security override will appear if you're not assigned the permission.

⌐▢ **Action Required:** Assign the new override permission to the security groups for users who are allowed to manually change prices when customer price levels are in use. For more information, see "Assigning and Updating the Price Level Permissions" on page 14.

Maintenance - Price Level Change Permission

An existing permission has been renamed and its purpose has changed. **Quotes Change Price Level** is now called **Price Level Change**. With this permission, users may offer special pricing for an item that has been added to a quote or a work order by selecting a global price level. Previously, the permission only affected quotes.

✎ **Action Required:** Review and update the assignments for the price level change permission as needed. For more information, see "Assigning and Updating the Price Level Permissions" on page 14.

Maintenance - Gross Profit Availability

The permission **Gross Margin Viewer** now controls whether the Dashboard (accessed by pressing **F9**) includes gross profit information. The gross profit dollar and gross profit percentage for the current day's work orders and invoices is shown only for users who belong to security groups that are assigned the permission.

Reports

New Feature - Vendor History Report Sort by Reference

To provide some added ease when reconciling vendor open items, a new **Sort by Reference** check box has been added to the Vendor History Report screen. This will allow the report to display the results in reference number order.

New Feature - Vendor Statement Report Sort by Reference

A new **Sort by Reference** check box has been added to the Vendor Statement Report screen. This will allow the report to display the results in reference number order.

Maintenance - Vendor History Report Correction

When you reverse AP Payment checks that included discounts, the reversed discounts are now listed on the Vendor History Report and are added to vendor balances, which ensures that the numbers in the Balance column have been calculated correctly.

Maintenance - Reports Reclassified

The AR Collections Report, Sales Comparison Report, Sales Information Report, and Sales Tax Ledger Report have been moved to the **Close** tab on the Report List. These reports were previously on the **Beta** tab, which has been removed.

Maintenance - Performance Improvements

Changes have been made to the Customer Price List to prevent slowdowns that sometimes occurred when this report was generated for a single customer.

Maintenance - AP Aging Report

Discounts are now included in vendor balance calculations on the AP Aging Report, when AP payments with discounts are voided by unapplying the checks with the ROA UnApply screen.

Invoice/Document Search

New Feature - Additional Information

A column has been added to the Invoice/Document Search screen to show the name of the customer or vendor associated with a document. For deleted work orders, this column shows the system-assigned customer number instead of the customer's name.

Marketing

Maintenance - Phone Number Exclusion

Company phone numbers are no longer excluded from printed postcards.

Commission Matrix

Maintenance - Copy Function Changes

Changes in this release ensure that commission matrix settings are duplicated and displayed properly when one employee's matrix is updated with a copy of another employee's matrix.

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. During the registration, you'll be asked for your support ID and password. If you don't have an internet connection, place a support call and 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. If you don't have this information, log a support call.

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**. A confirmation message appears.

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

Validating TireMaster

TireMaster needs to be validated before you can access several program areas and complete 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

Before you can use some of TireMaster's new features, you need to complete various settings.

Preparing to Take Deposits

Before you can process deposits at point of sale, you need to do the following:

◆ Add an account for tracking deposits to your chart of accounts (TireMaster Plus and TireMaster Corporate only). This account is typically a liability account.

◆ Define the deposit clearing account for deposits in System Controls (TireMaster Plus and TireMaster Corporate only).

   Note: To pass the data validation in TireMaster Plus and TireMaster Corporate, the clearing account for deposits must be defined in System Controls.

◆ Define a minimum dollar amount for deposits in System Controls.

◆ Define a minimum percentage for deposits in System Controls.

You might also want to add an item to your inventory for assessing service charges (for example, restocking fees) when customers back out of purchases and ask for refunds of their deposits.

To prepare to take deposits

1. Add a liability account for tracking deposits to the chart of accounts (TireMaster Plus and TireMaster Corporate only). Instructions for adding general ledger accounts are available in the TireMaster help system and user guide.

2. Define the clearing account for deposits (TireMaster Plus and TireMaster Corporate only). Setting this control is required to pass the TireMaster data validation.

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

    b. Click the **General Ledger** tab.

    c. Select **Deposit - Clearing Account** and press **Enter**.

    d. Select the general ledger account for tracking deposits from the chart of accounts, and click **OK**.

3. Define the minimum dollar amount and percentage for deposits.

a. Click the **Customer** tab.

b. Select **Deposit - MIN Dollar Amount** and press **Enter**.

c. Type the lowest dollar amount customers are allowed to pay toward future purchases, and click **OK**.

d. Select **Deposit - MIN Percentage (%)** and press **Enter**.

e. Type lowest percentage of the invoice total (as a whole number) that customers are allowed to pay toward future purchases, and click **OK**.

Note: When the minimum deposit percentage for an invoice is less than the minimum dollar amount allowed for deposits, the customer is required to pay the minimum deposit dollar amount.

4. If you want to assess service charges (such as restocking fees) when customers back out of purchases, set up an inventory item to collect those fees. Instructions for adding a fee item are available in the TireMaster help system and user guide.

Setting the DOT Bypass Control

Setting the DOT bypass control lets you define whether entering tire identification numbers is required. If you don't use the DOT Interface, disregard this setting. For more information, see "New Feature - Bypass Control" on page 2.

To set the DOT bypass control

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

2. Click the **Other** tab.

3. Select **DOT Interface - Entry Bypass**, and press **Enter**.

4. Define whether collecting tire identification numbers is required.

   ◆ To require the entry of tire identification numbers, select **No**.
   ◆ To allow users to disregard entering tire identification numbers, select **Yes**.

5. Click **OK**.

6. Close the System Controls screen.

Accepting the myCARFAX End User License Agreement

Before you can offer myCARFAX registration to your customers, you need to accept the myCARFAX end user license agreement (EULA). The EULA is available at https://service.carfax.com/csn/csnTerms. For more information, see "New Feature - myCARFAX Registration" on page 3.

To accept the end user license agreement for myCAFAX

1. Review the end user license agreement at https://service.carfax.com/csn/csnTerms.

2. From the **Interfaces** menu, select **Interface Setups**. The Interface Setup screen appears.

3. Click **CARFAX Interface**. The CARFAX Settings screen appears.

4. If you haven't already signed up for CARFAX, fill out the form on the CARFAX Setup screen. For more information, refer to the TireMaster help system or user guide.

5. Click **myCARFAX Authorization**. The myCARFAX Signup EULA screen appears.

6. Click **Accept**.

7. Close the open screens.

Setting Up Price Levels for Government-Support Customers

If you want to use price levels for any of your government-support customers, you need to enable price levels for this customer type and assign price levels to your government-support customers as needed. For more information, see "New Feature - Price Levels for Government-Support" on page 3.

To set up price levels for government-support customers

1. Define whether price levels are available for the government-support customer type.

   a. From the **Customers** menu, select **Types**. The Customer/Vendor Type List appears.

   b. Select the government-support type, and click **Edit**. The Customer/Vendor Type Edit List appears.

   c. In the **Options** area, select the **Price Levels for National/GS** check box.

   d. To save your changes, click **OK**.

2. Assign price levels to your government-support customers.

   a. From the **Customers** menu, select **List Editing**. The Customer Range Lookup screen appears.

   b. Click ⊡ next to the **Customer Type** field. The customer type list appears.

   c. Select the type for government-support customers, and click **OK**.

   d. Click **OK** again. The Customer List Editing screen appears.

   e. Scroll to the **PLEVEL** field. Then select price levels as needed. To assign a level, click ⊡ and make a selection from the list that appears.

   f. When you're done assigning the levels, close the open screens.

Preparing to Use Price Matrixes

With the Price Matrix, items' selling prices are calculated based on where their cost falls within a range. To use this pricing method, you need to define one or more matrixes and assign them to items. Once matrixes are assigned, prices are automatically recalculated. Furthermore, if you change the cost of an item while receiving it into inventory, the price will be automatically updated if a matrix has been assigned to it. For more information, see "New Feature - Price Matrix" on page 4.

To prepare to use the price matrix

1. From the **Inventory** menu, select **Price Matrix**. The Price Matrix screen appears.

2. Type the name of the matrix.

3. For *each* range in the matrix, complete the following steps.

   a. Define the low and high cost amounts.

   > **Note:** Prices do not update when there are gaps between matrix ranges. Therefore, when you add the second range and any additional ranges to a matrix, the amount in the

> > **Low Cost** field needs to match the amount in the **High Cost** field for the previous range.

> **b.** For price changes based on a percentage, make sure **Percent** is selected. To change prices by a fixed dollar amount, select **Amount**.

> **c.** Type the percentage or amount for the range.

4. Click **Save Matrix**.

5. Set up additional matrixes as needed.

> **a.** Click **Clear Matrix** to reset the screen.

> **b.** Repeat steps 2 through 4.

6. Assign matrixes to items.

> **a.** Select **Pricing Wizard** from the **Inventory** menu. The Pricing Wizard screen appears.

> **b.** Make sure **Price Change** is selected.

> **c.** Select Matrix from the **Field to Update** drop-down for the first operation. A second drop-down that lists the available matrixes appears.

> **d.** Select the matrix you want to assign from the second drop-down.

> **e.** Click **Inventory** and look up the items to which you'll assign the matrix.

> **f.** Click **Apply**, and close the confirmation message that appears.

Preparing to Track Core Items in Inventory

Before you track core items in the inventory subledgers, it is necessary to set a system control, add inventoriable core items to inventory, and associate the items with applicable inventory items. For more information, see "New Feature - Core Item" on page 4.

To prepare to track core items

1. Enable the **Core Item** field.

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

> **b.** Click the **Inventory** tab.

> **c.** Click **Enable Core Item Field**, and press **Enter**.

> **d.** Select **Yes**, and click **OK**.

2. If you want to track the inventory, sales, and expenses for the core items separately from other items, add applicable general ledger accounts to the chart of accounts (optional).

3. Add one or more *inventoriable* core items to your inventory.

> **Note:** When you add the core item, disregard setting prices for it.

4. Associate the inventoriable core items to the applicable parent inventory items.

> **a.** Look up the parent item you will be associating the core to.

> **b.** Click **Edit**.

> **c.** Click the **Core Item** field.

> **d.** Press $\boxed{\sim}$ and search for the core inventory item you want to associate.

5. Click **OK**, and close the Inventory Maintenance screen.

Preparing to Use Core Costs for Inventory Items

The core charge that a vendor assesses for an item can be stored along with the item's price and cost information, allowing you to recall the core cost at point of sale. Typically core costs will be assigned to items as you receive them, however, you have the option to assign core costs to individual items in Inventory Maintenance. For more information, see "New Feature - Core Cost" on page 5 and "Preparing to Track Cores" in the TireMaster help system or user guide.

To prepare to use core costs

1. Enable the Track Cores feature.

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

    b. Click the **Inventory** tab.

    c. Click **Track Cores**, and press **Enter**.

    d. Select **Yes**, and click **OK**.

2. Assign core costs to individual items (optional).

    a. Look up the item whose core cost you want to assign.

    b. On the Inventory Maintenance screen, click the **Qty/Pricing** tab. The Site Prices and Quantity screen appears.

    c. Type the amount of the vendor's core charge in the **Core Cost** field.

    d. Click **OK**.

    e. Close the open screens.

Preparing to use the TM Support Connect Tool for Remote Support

Installing the TM Support Connect tool on each computer that runs TireMaster will prepare you for remote support assistance. When you speak with a TireMaster Support technician by phone, you'll be given a support code to initiate a remote connection. For more information, see "New Feature - TM Support Tool Icon" on page 5.

To install the TM Support Connect tool on the server

1. On the server desktop, double-click the **TMSupportInstall** icon.

2. Click **Next** on the Choose Installation Location screen.

3. Click **Next** on the Ready to Install screen. The installation begins.

4. Clear the **Launch TM Support Connect** check box, and click **Finish**. The TM Support Connect icon is now on the desktop.

To install the TM Support Connect tool on workstations

1. On each workstation, go to the TireMaster **Apps** folder on the server.

2. Double-click the **TMSupportConnect** icon.

3. Click **Next** on the Choose Installation Location screen.

4. Click **Next** on the Ready to Install screen. The installation begins.

5. Clear the **Launch TM Support Connect** check box, and click **Finish**. The TM Support Connect icon is now on the desktop.

Setting the New System Controls

New system controls have been added in this release. Set the controls as needed for your business. For more information, see "New Feature - Additional Controls" on page 6.

To set the new system controls

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

2. Define the vehicle year format.

   a. Click the **Customer** tab.

   b. Select **Vehicle Year Format**, and press **Enter**.

   c. Select the four digit format, or leave the control set to the two digit format. Then click **OK**.

   > **Note:** This control must be set to the four digit format on systems running the CustomerLink Interface.

3. Define whether a confirmation message appears when the price of an item is recalculated.

   a. Click the **Inventory** tab.

   b. Select **Show Recalculate/Update EDL** message, and press **Enter**.

   c. Select **Yes** or **No**. Then click **OK**.

4. Define whether a confirmation message appears when you change an item's price to an amount that's less than its cost at point of sale.

   a. Click the **Other** tab.

   b. Select **POS Message - Disable Below Cost Message**, and press **Enter**.

   c. Select **Yes** or **No**. Then click **OK**.

5. Define whether to enable the **Core Item** field in Inventory Maintenance. For more information, see "Preparing to Track Core Items in Inventory" on page 12.

6. Close the System Controls screen.

Assigning and Updating the Price Level Permissions

You can define whether employees are allowed to change prices at point of sale with a pair of price level permissions. One of the permissions is new and the other is an existing permission for which functionality has changed. For more information, see "New Feature - Price Level Override Permission" and "Maintenance - Price Level Change Permission" on page 6.

To assign and update the price level permissions

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

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

3. Assign the permission for overriding price levels.

   a. On the list of security groups, select the name of the group to which you want to assign the permission.

b. In the **Assignments** area, select **Permissions**.

c. On the list of unassigned permissions, select **Price Level Override** and click [<--].

d. Repeat steps 3a and 3c to assign the permission to additional security groups.

4. Review the assignments for changing price levels.

a. On the list of security groups, select the name of the group whose permission assignments you want to review.

b. In the **Assignments** area, select **Permissions**.

c. See if **Price Level Change** has been added to the list of assigned permissions.

d. If the permission is not listed with the assigned permissions and you want to assign it, select it from the list of unassigned permissions and click [<--].

e. Repeat steps 4a through 4d to review the permission assignments for additional security groups.

5. Close the Security Assignments screen and the User List.