ReadMe - TireMaster Point of Sale 9.2.5

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 Autotask (use the link at support.tiremaster.com) or call TireMaster Support at **800-891-7437**.

Add-Ons

Maintenance

- The price of an add-on item calculated as a percentage of the parent item's price is now recalculated when the parent item's price is changed on a work order.
- Add-on items are now listed in the same order on both work orders and quotes.

CARFAX

Maintenance

Errors no longer appear when you try to retrieve CARFAX history for vehicles that have no service records or service categories.

Customers

Maintenance

- Searches for customers who are assigned two primary contact methods or duplicate color codes no longer produce errors.
- An error no longer appears when you search for a customer using a VIN and then click **List Edit** on the Customer List.
- Now you can edit customer records when the entry in the **Name** field is accidentally left blank on the Customer Maintenance screen.

Document Email

Maintenance

This release corrects an issue that prevented users from simultaneously emailing multiple documents from some customer subledgers.

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Epicor Integrated Service Estimator (ISE)

Maintenance

The following changes affect TireMaster systems that run the Epicor ISE:

- When parts and labor items retrieved from Epicor are added to an existing service checklist, the current date is used for them instead of the date on which the checklist was created.
- Add-ons are no longer excluded from work orders when local inventory items are used. (On systems running version 7.5 of the Epicor ISE Interface.)
- Existing work order comments no longer disappear when the ISE is accessed from the Quick Jobs menu (by pressing **F11**) and Epicor specifications and comments are added to the work order.

Forms

Maintenance

- A colon no longer prints in the space for shop supplies when shop supplies are disabled or excluded from a work order.
- Global comments print near the bottom of the page, above the signature line and totals, once again.
- When the charge amount for a credit sale is a whole number, a decimal point and two zeros print on the invoice now (to the left of the totals).
- On invoices, the letter A is once again included on the far left side of the line for the item that has been adjusted.
- Credit card information and signature lines are no longer excluded from ROAs and deposit documents.

Inventory

Maintenance

- A **Clear Layout** button has been added to the Inventory List. Clicking this button reloads the screen's *original* settings. You can use it to reset the screen when columns have been moved close together or can no longer be seen at all.
- When multiple items share the same product code, a warning message appears when opening the screen for managing A–E price levels.
- When you edit the product code for an existing item, it's A–E price levels are no longer deleted.

PO System

Maintenance

- The column heading **INVNO** has been renamed **Product Code** on the Purchase Order and Receiving Document screens.
- A **Total Qty** field has been added to the Purchase Order screen, so you can easily see how many items are on a purchase order.

- The manner in which amounts are calculated for PO System documents has been changed to prevent rounding errors.
- Functionality has been added to help you deal with issues that can occur when completing purchases. If an error occurs while processing a vendor invoice document, TireMaster prompts you to process the VID. If you click **Yes**, the document is processed. If you click **No**, you then have the option to delete the VID and price the receiving document.
- When an inventory return (IR) is backdated to a date from a previous fiscal period, it now posts to the general ledger using the effective date defined by the user instead of the current date.
- This release resolves an issue that prevented the Purchase Order screen from opening when creating suggested POs.

Point of Sale

Maintenance

- When an add-on package includes a discount, you can edit the description of the discount on the Invoice Entry screen.
- Customer price level assignments are no longer ignored when changing the customer on a work order.
- When you click **Sold To** on the Invoice Entry screen and update a customer's payment terms, the changes take effect immediately. Therefore, the new terms are available when you finalize the sale.
- The customer can no longer be changed on a work order that includes a deposit. Previously, when the customer was changed in this scenario, the deposit remained with the original customer instead of going to the newly-selected customer. If you realize that the wrong customer was selected, add each item that the customer is purchasing to the work order a second time, use negative numbers for the quantities, and process the order as a return. For more information, see *Refunding Deposits* in the TireMaster help system or user guide.
- When a credit card deposit is refunded, an entry for the refund now posts to the customer subledger account for tracking the credit card.
- This release addresses an issue that prevented credit card invoices from being completed, because the credit card and invoice completion screens appeared out of order after the cards were processed.
- When national account sales are finalized, the **Terms** section on the Invoice Completion screen is now set to **1 Payment** regardless of the number of installments defined in the customer's terms. This change ensures that only one payment is calculated for national account sales. If you process a *normal* sale for the customer, the number of payments defined in the customer's terms will be calculated instead.
- An error no longer prevents you from completing an invoice when a customer pays with more than six credit cards. The maximum number of eight cards can now be used in TireMaster.
- Errors no longer appear when the **#Copies** field on the Invoice Completion screen is blank or is filled in with a long number. In that scenario, the number of copies is automatically set to 0 and the document opens on the screen.

- The amount printed at the bottom of credit memos is now handled correctly for credit memos that have multiple offset lines. Previously, the number that printed was the amount of the last offsetting entry instead of the credit memo total.
- Expired quotes and estimates are no longer retrieved directly from the Customer Maintenance and Vehicle screens. If an active quote/estimate exists for a customer, TireMaster will prompt you to open it. To retrieve the active quote/estimate, click **Yes**. To see if the customer has expired quotes/estimates, click **No** instead. Expired quotes/estimates are available on the Quote and Estimate List.

Pricing

Enhancement

A **Load/Apply Matrix** button has been added to the Price Matrix. After you update a matrix and save your changes, you can click the button to update all of the items to which the matrix is assigned.

Maintenance

The same price is now used for both quotes and work orders when an item is included in two different price level discounts that calculate markups and are both assigned to the same price level. This issue only affected price levels that are assigned to customers.

Reports

Maintenance

- The Inventory Moving Report retrieves only the items that match the search criteria entered when launching the report. Previously, all items were retrieved regardless of the parameters used to limit the search results.
- Invoices are now ordered correctly when the Sales Information Report is set to show detail and sort invoices by date.
- Only major account descriptions are used on balance sheets (regular and month-to-date) when you roll up the minor accounts. Previously, one of the minor account descriptions printed despite being rolled up.
- Government support sale information is now handled correctly on income statements, regardless of which GL class is assigned to a reconciliation code and which field is used to assign the reconciliation code to items. (Up to four reconciliation codes can be assigned to items in Inventory Maintenance.)
- System slowdowns that occurred when printing the Suggested Reorder Report and the Inventory Reorder Report have been addressed. Also, when generating the Inventory Reorder Report, TireMaster prompts you to print it again (for a different set of items).

Sales Tax

Maintenance

When a sales tax rate is about to expire, TireMaster will display a notification message when users log in. The message will first appear a week before the rate expires and will continue to appear until the rate is updated or expires.

Scheduler

Enhancement

A filter has been added to the Appointment List so you can limit the number of appointments displayed. The filter includes the options to display appointments for 7 days, 15 days, 30 days, or all appointments. The filter is visible when the **Show Detail** check box is selected.

Action Required: Define the number of appointments shown on the Appointment List by setting the new filter. For more information, see "Changing the Appointment List Display" on page 7.

Security

Enhancement

With a new permission, **Work Order Change Tax Level**, you can define which users are allowed to select a different tax level for a work order.

Action Required: After updating, assign this permission to the security groups whose users are allowed to change tax levels at point of sale. For more information, see "Assigning the New Tax Level Permission" on page 6.

Maintenance

This release addresses an issue with the permission **Invoicing Edit Printed Work Orders**. Users who are assigned this permission are allowed to add items to and delete items from work orders that have been printed.

Statements

Maintenance

- Invoice dates are now displayed chronologically on customer statements.
- Due dates on real-time statements are now listed in chronological order.
- The PO (or reference) number field on monthly statements and real-time statement now holds the same number of characters as the PO or reference number field on the Work Order and Invoice Entry screens (16 character maximum).

System Controls

Enhancements

Two new controls have been added to the TireMaster System Controls screen:

- **Vehicle History - This site only checked** is now available on the **Other** tab. When this control is set to Yes on TireMaster systems running the Data Exchange application, the **This Site Only** check box is selected by default on the Vehicle History screen.

  Action Required: If you're a Data Exchange user, set the control to indicate whether you want the **This Site Only** check box to be selected by default. For more information, see "Setting the Vehicle History Control for Data Exchange" on page 7.

- **Checklist - Include Add-Ons for Inspection Areas** has also been added to the **Other** tab. With this control, you define whether add-ons are automatically included in service checklist inspection areas (when you're setting up service checklists) and on the Quotes and Estimate Writer screen.

  Action Required: Indicate whether to automatically include add-on items on the inspection area setup screen and the Quote and Estimate Writer. For more information, see"Setting the Inspection Area Add-On Control" on page 7.

System Infrastructure

Maintenance

- To ensure that there are enough database connections, all logged-in users are disconnected from TireMaster every night. This change does not affect system connections or replication.
- The update process has changed for workstations. When you log in to a workstation, TireMaster displays a message listing all of the applications that need to be updated. Click **Yes** to begin and follow the on-screen prompts to update the first one. When it's finished, the next update will start. Once again, follow the on-screen prompts to complete the update. This process will continue until all of the of the updates are completed.

TireMaster Dashboard

Maintenance

TireMaster no longer crashes when **F9** is pressed multiple times when opening the Dashboard.

Setting Up New Features

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

Assigning the New Tax Level Permission

Assign the permission, **Work Order Change Tax Level**, to security groups whose users are allowed to choose different tax levels at point of sale.

To assign the tax level permission

1. Select **Setup** > **Users & Permissions**. The User List opens.

2. Click **Security**. The Security Assignments screen opens.
3. Under **Selection**, make sure **Groups** is selected. Then select the name of the group to which you want to assign the permission.
4. Under **Assignments**, select **Permissions**.
5. On the list of unassigned permissions, select **Work Order Change Tax Level** and click <--.
6. Repeat steps 3 through 5 for each security group that needs to be assigned the permission.
7. Close the open screens.

Changing the Appointment List Display

If you want to limit the number of appointments shown on the Appointment List, change setting for the filter that has been added to the screen.

To change the Appointment List Filter

1. If the Open Work Order List isn't already open, click **Invoicing**.
2. Click **Schedule**. The Appointment List opens.
3. Make sure the **Show Detail** check box is selected.
4. Select one of the options under **Number of Days to View**.
5. Close the open screens.

Setting the Vehicle History Control for Data Exchange

With a new control, you can define whether the Vehicle History screen displays only the invoices for your site by default.

Note: If your TireMaster system does not include the Data Exchange application, disregard setting the control.

To set the vehicle history control

1. Select **Setup > System Controls**.
2. Click the **Other** tab.
3. Select **Vehicle History - This site only checked** and press **Enter**.
4. If the check box should be selected by default, select **Yes** and click **OK**. Otherwise, leave the control set to No.
5. Close the System Controls screen.

Setting the Inspection Area Add-On Control

A new control lets you define whether add-ons are automatically included in service checklist inspection areas and on the Quotes and Estimate Writer.

To set the inspection area add-on control

1. Select **Setup > System Controls**.
2. Click the **Other** tab.
3. Select **Checklist - Include Add-Ons for Inspection Areas** and press **Enter**.

4. Do one of the following and click **OK**.
   - Set to **Yes** if you want add-on item packages to be assigned to service checklist inspection areas along with parent items. Setting to **Yes** will also include add-ons on the Quote and Estimate Writer screen.
   - Set to **No** if you want only parent items to be assigned to service checklist inspection areas. Setting to **No** will also exclude add-on items from the Quote and Estimate Writer screen.

     Note: Individual add-on items can be manually assigned to inspection areas when setting up a service checklist or preparing an estimate.
5. Close the System Controls screen.