



# **Training Guide**

**TireMaster Point of Sale 9.2.0**

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If you have comments about this or any other TireMaster documentation, call **800-891-7437** or email [info@asatire.com](mailto:info@asatire.com).



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# Getting Acquainted with TireMaster


Welcome to TireMaster training class. We're happy you joined us. If you have questions during class, don't hesitate to ask. Let's get started by getting acquainted with TireMaster. This chapter includes the following sections:

- ◆ "Logging in to TireMaster" on page 1
- ◆ "Finding Helpful Information" on page 2
- ◆ "The Message Center" on page 4
- ◆ "The TireMaster Support Site" on page 4
- ◆ "FixMe.IT" on page 5
- ◆ "Autotask" on page 6
- ◆ "Working with Site Information" on page 7

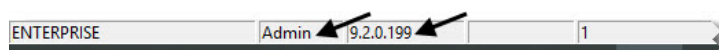
## Logging in to TireMaster

The first time you log in to TireMaster, you'll use credentials that have already been set up in the startup database. Once you change the system administrator's password, log in with the updated settings for that user account instead.

### To log in to TireMaster

1. Double-click the TireMaster icon (  ) on the computer's desktop. The login screen appears.
2. Type your user name and password. For class, your user ID is **admin** and the password is **admin**. TireMaster passwords are case sensitive.
3. Click **OK**.

You can identify which user is logged in to TireMaster by looking at the ID displayed at the bottom of the screen (Figure 1). The TireMaster version number is next to the user ID.



*Figure 1: The User's ID and the TireMaster Version Number*

# Finding Helpful Information

Instructions for performing tasks and reference information are available in TireMaster's help system and user guide.

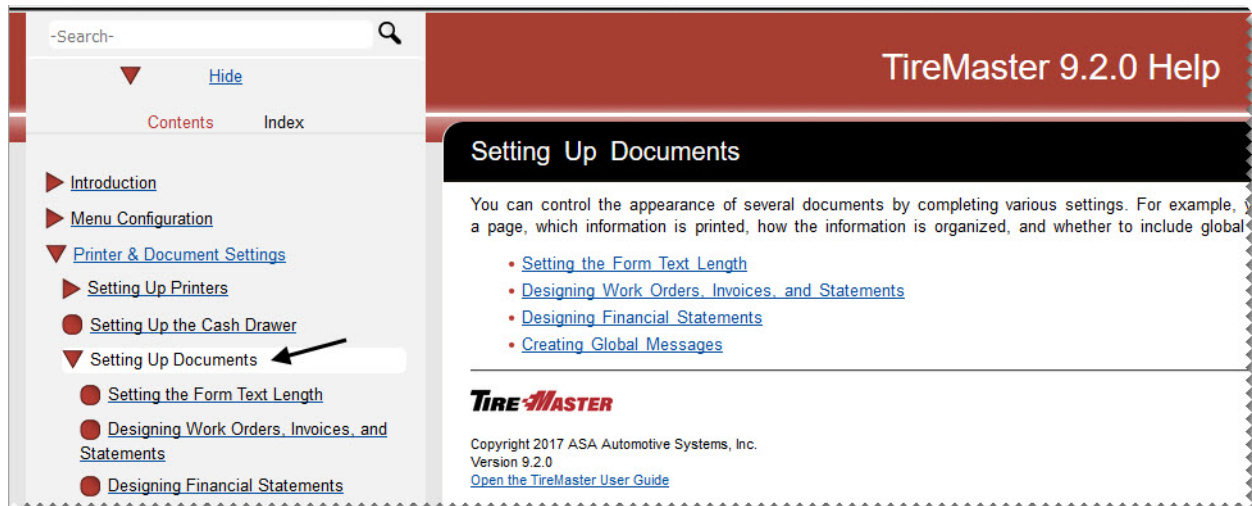
## Accessing the Help System

You can access the help system by selecting **Help Contents** from the **Help** menu. However, the easiest way to access the help system is to press **F1** on the computer's keyboard (Figure 2). When you press **F1**, the help topic that appears includes information that's relevant to the screen that's currently open.



**Figure 2:** The F1 Key

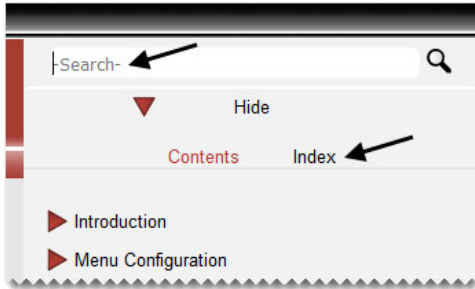
You can also find information in the help system by clicking ► and ● to expand and collapse the headings in the table of contents (Figure 3).



**Figure 3:** Expanding and Collapsing Headings

Finally, search and index (Figure 4) are also available for looking up help topics with keywords.





*Figure 4: Help System Search and Index*

The **Search** field is available in the upper left of the screen. For searches, type one or more search terms and press **Enter**.

To look up index entries, click **Index**. Then type a keyword and press **Enter** to retrieve a list of matching index entries.

## Accessing the User Guide

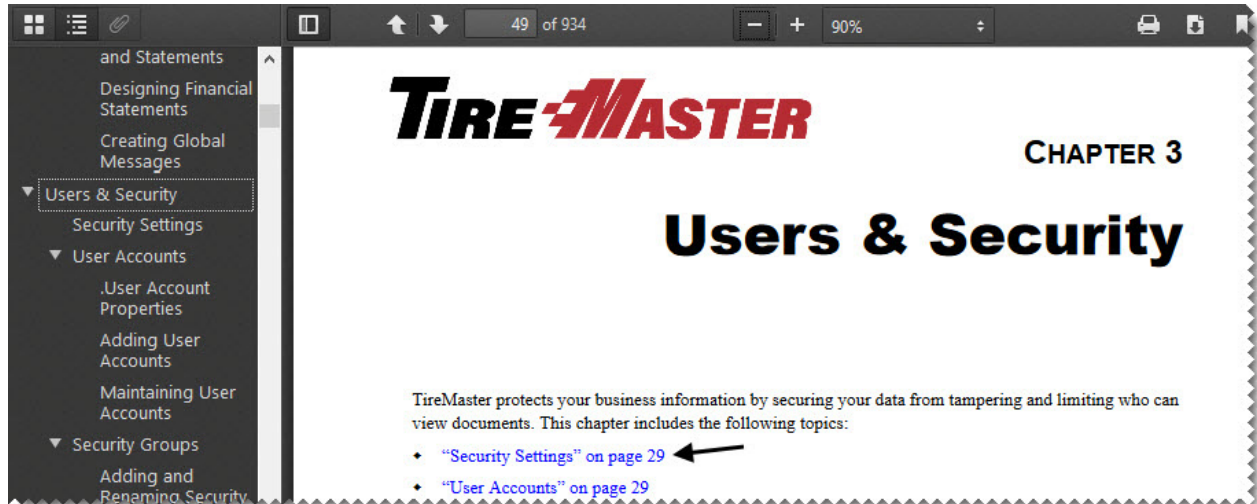
TireMaster includes a user guide that's provided in the PDF file format. To access the user guide, click the link at the bottom of the help system screen (Figure 5).



*Figure 5: Help System Link to the User Guide*

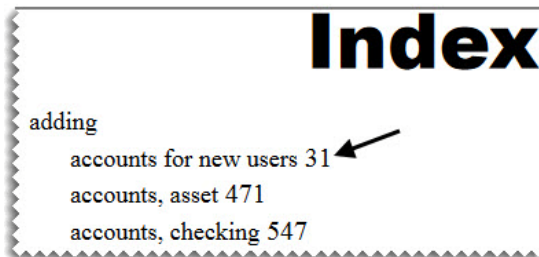
When the user guide opens, click the headings on the table of contents and the blue hyperlinks in the document to find the information you need (Figure 6).

**Note:** The FireFox browser was used for the image in Figure 6. If your table of contents looks different, your computer uses a different default browser.



**Figure 6:** Clicking Chapter Headings and Hyperlinks

You can also locate information from the index by clicking the page number for an entry (Figure 7).



**Figure 7:** Clicking an Index Entry's Page Number

## The Message Center

The TireMaster message center is used by ASA to provide you with information about a variety of subjects, including new release availability and holiday closures.

When a new notice is sent, the message indicator (**\*\* Message \*\***) appears at the bottom of the TireMaster screen. Messages remain in TireMaster until 30 days after they're sent. To view a message, double-click the word *Message* on the status bar at the bottom of the screen.

## The TireMaster Support Site

The TireMaster Support Site includes a collection of information and applications that you can use to maintain your TireMaster system. On the support site, you can access the following:

- ◆ Installers for TireMaster and products that have been integrated with TireMaster
- ◆ Printer drivers and other tools
- ◆ Documentation for TireMaster and products that have been integrated with TireMaster

To access the Support Site, log on to <http://support.tiremaster.com>. Then enter the customer number and password provided to you by TireMaster Support and click **Login**.

## FixMe.IT

FixMe.IT is a remote desktop application that establishes a direct connection between your computer and the computer of a TireMaster Support technician. The connection allows the support technician see your system, making it easier to address your issues and answer your questions.

You can access the FixMe.IT installer from the TireMaster Support web site. Log on to [Support.TireMaster.com](http://Support.TireMaster.com) and click **Support FixMe IT Connection Application** on the login page (Figure 8).

**ASA** Automotive Systems, Inc.

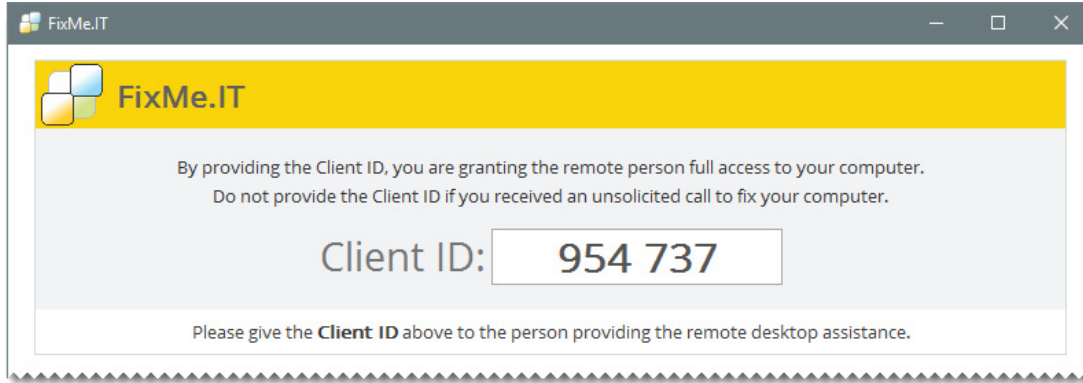
**Welcome to the TireMaster Support Center**  
Please log in.

|                  |                          |              |
|------------------|--------------------------|--------------|
| Enter Customer#: | <input type="text"/>     | <b>Login</b> |
| Enter Password:  | <input type="password"/> |              |

If you do not know your customer name and password, call TireMaster Support at **800-891-7437**.  
To log an online support request, [click here](#).  
To register for an online support account, [click here](#).  
[Support FixMe IT Connection Application](#) ←

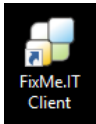
**Figure 8:** *FixMe.IT Installer Link*

Depending on your browser, you'll be able to click the file name (FixMeitClient.exe file) and begin the installation right away or you'll have to save the installer on your computer first. At the end of the installation, the client ID screen will appear. Give the ID number to the support technician who is assisting you, so he or she can complete the connection.



**Figure 9:** *FixMe.IT Client ID*

At the end of the installation, a FixMe.IT *client* icon is added to the computer's desktop. During subsequent contact with TireMaster Support, double-click that icon to retrieve the client IDs for those calls.



**Figure 10:** *FixMe.IT Client Icon*

**Note:** Once the FixMe.IT installation is complete, you can delete the icon for the FixMe.IT installer (**FixMeitClient.exe**).

## Autotask

Autotask is an online help desk for submitting support tickets. The Autotask website is available 24/7. When you submit a support ticket, you need to provide a description of the problem you're reporting, along with troubleshooting information, error messages, and supporting documentation such as attachments of screenshots.

Before you can access Autotask, you need to register for an AutoTask account. To register, click the link to request a AutoTask account on the login page of the TireMaster Support site (Figure 11). The Support site's home page also includes links to log support calls with AutoTask.

**ASA** Automotive Systems, Inc.

**Welcome to the TireMaster Support Center**

Please log in.

Enter Customer#:

Enter Password:

Login

If you do not know your customer name and password, call TireMaster Support at **800-891-7437**.

To log an online support request, [click here](#).

To register for an online support account, [click here](#).

[Support FixMe IT Connection Application](#)

*Figure 11: Autotask Links on the TireMaster Support Site*

## Working with Site Information

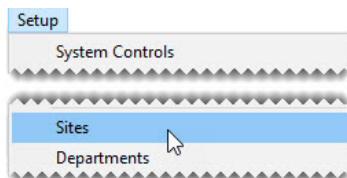
When you set up your TireMaster system, you'll define the contact information for your store (for multi-store systems, you'll do this for each site) and choose the text that will be used in the header for printed reports.

### Walk-Through: Defining Site Information

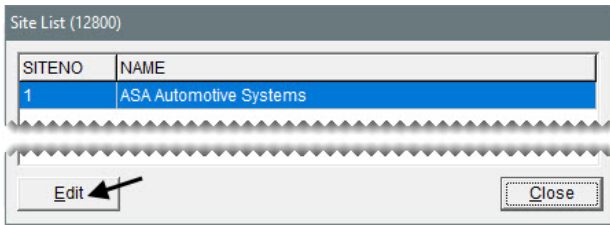
To distinguish documents generated by your TireMaster system from others in the class, add the information for your store to the site setup screen. Then specify the text that will be used for report headers. (Typically, it's the store name.)

#### To define site information

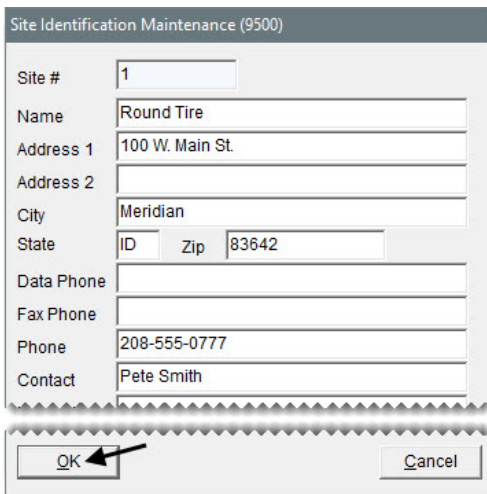
1. Enter your store information.
  - a. From the **Setup** menu, select **Sites**. The Site List appears.



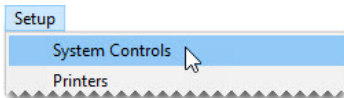
- b. Make sure site 1 is selected and click **Edit**. The Site Identification Maintenance screen appears.



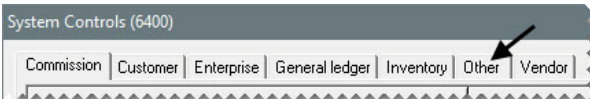
- c. Replace the information on the screen with your store's name, address, phone numbers. For the contact person, enter your name. When you're done, click **OK** to save your changes.



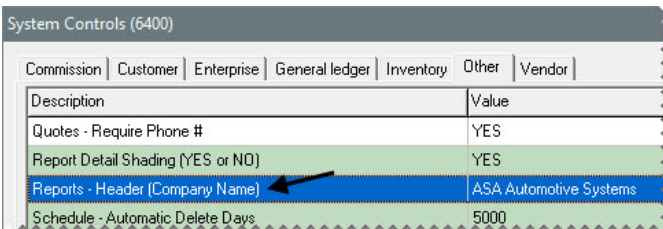
- d. Close the Site List.
2. Enter the text for the report header.
    - a. From the **Setup** menu, select **System Controls**.



- b. Click the **Other** tab.



- c. Select **Reports - Header (Company Name)** and press **Enter**.



- d. Type the name of your store and click **OK**.



- e. Close the System Controls screen.





# Customers and Invoicing

Most of the daily tasks performed with TireMaster occur in the Invoicing application. This chapter includes the following topics:

- ◆ “Starting a Basic Work Order” on page 11
- ◆ “Completing an Invoice” on page 13
- ◆ “Adding Information to Work Orders” on page 16
- ◆ “Adding Customers and Vehicles” on page 22
- ◆ “Reversing Invoices” on page 28
- ◆ “Handling Payments for Special Orders” on page 30

## Starting a Basic Work Order

When a customer needs to purchase items and services, you’ll usually start a work order, which will be turned into a completed invoice.

### Walk-Through: Starting a Basic Work Order

Joe Carlson brings his Kia in for a new set of tires. Start a work order for this job and print a copy to send out to the shop.

#### To start a work order

1. Click **Invoicing**. The Open Work Order List appears.

Invoicing

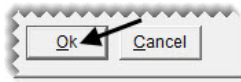
2. Click **New Work Order**. The Name/Lookup Entry screen appears.



3. Look up the customer and vehicle.

- a. Type **Carlson, Joe** in the **Enter Name** field, and click **OK**. The Customer Maintenance screen appears.

- b. To accept the customer, click **OK**. The Vehicle List appears.



- c. Make sure the Kia Soul is selected, and click **OK**. The Work Order screen appears.

| Year | Make | Model     | Unit # | License | Mileage | Site | VIN               | Veh # |
|------|------|-----------|--------|---------|---------|------|-------------------|-------|
| 14   | KIA  | SOUL PLUS |        | 1ake327 | 0       | 1    | KNDJP3A52E7705991 | 107   |

Below the table are buttons for 'Add', 'Edit', 'Delete', 'Transfer', 'Combine', 'History', 'CARFAX History', 'CARFAX CUSTOMER SIGNUP', 'Find Vehicle', 'Search', 'Active Only', 'Checklist', 'Other Checklist', 'OK', and 'Close'. An arrow points to the 'OK' button.

- d. Click **OK** to continue. The Invoice Entry screen opens.



4. Add an item to the work order.
  - a. Click the **Size** field, type **2354518** (tire size without the letter and slash), and press **Enter**. The Inventory List appears.

Invoice Entry (3300)

Invoice: 114    1/ 2/2018    Sales    Admin

Sold To: CARLSON, JOE    Contact    Tax Level

Ship To:    208-555-3344

| Quantity | Size    | Description | Parts | Labor | FET | Tax |
|----------|---------|-------------|-------|-------|-----|-----|
|          | 2354518 |             |       |       |     |     |

- b. Select the Bridgestone Sport Potenza tire (product code 139885), and click **OK**. The tire is added to the work order.

Inventory List (2000)

| Prod Code | Size         | Description         | Available | On Order | On WO | Best   | S |
|-----------|--------------|---------------------|-----------|----------|-------|--------|---|
| 706038163 | 235/45R18/SL | LS-2 EAGLE          | 12        | 0        | 0     | 117.33 |   |
| 93111     | 235/45ZR18XL | AS GTZ TIGER PAW    | 4         | 0        | 0     | 165.29 |   |
| 08998     | 235/45ZR18XL | COMP-2 gF SPT       | 4         | 0        | 0     | 177.00 |   |
| 000894    | 235/45R18    | RE97AS POTENZA      | 4         | 4        | 0     | 190.97 |   |
| 139885    | 235/45R18XL  | RE760 SPORT POTENZA | 4         | 4        | 0     | 191.00 |   |
| 109084366 | 235/45R18/SL | EAG SPORT AS        | 8         | 0        |       |        |   |
| 140021    | 235/45R18    | EL400-02 TURANZA    | 4         | 4        |       |        |   |

OK    Cancel

- c. Type **4** in the quantity field, and press **Enter**. The add-on items appear.

| Quantity | Size        | Description         |
|----------|-------------|---------------------|
| 4        | 235/45R18XL | RE760 SPORT POTENZA |

5. Print the work order.
  - a. Click **Work Order**. The Work Order screen appears.

Work Order    Complete    Quit

Tax: 51.62

Total: 971.94

- b. To print the work order to the screen, set the number of copies to 0. For a hard copy, set it to 1.

Print    #Copies: 1

## Completing an Invoice

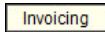
When customers pay for merchandise and services, you turn their work orders into completed invoices.

## Walk-Through: Completing an Invoice

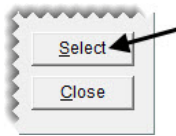
Joe Carlson returns to pay for his new tires. Before you complete the invoice, make sure tech Russell Smith receives credit for the job, and record the DOT numbers from the tires. Mr. Carlson pays with the exact amount of cash.

### To complete an invoice

1. Retrieve the customer's work order.
  - a. If the Open Work Order List isn't already open, click **Invoicing**.



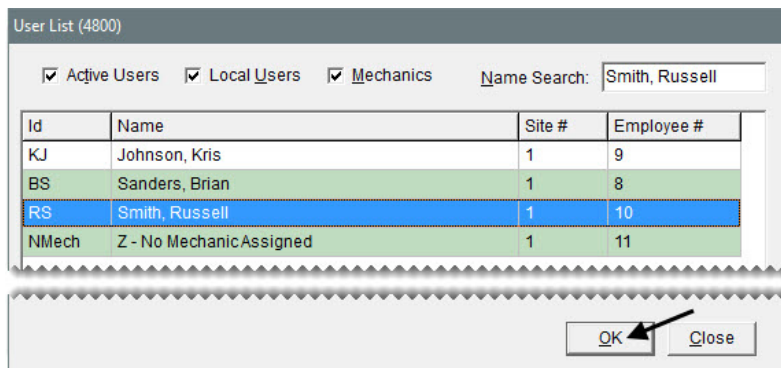
- b. Select Joe Carlson's work order, and click **Select**. The Invoice Entry screen appears.



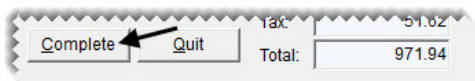
2. Assign a technician to the job.
  - a. In the row for the tire, click the **Mech 1** field and press . The User List appears.

| Quantity | Size        | Description            | Parts  | L | Mech 1 | Mech 2 | Flat Rate | Cor |
|----------|-------------|------------------------|--------|---|--------|--------|-----------|-----|
| 4.00     | 235/45R18XL | RE760 SPORT POTENZA    | 191.00 |   |        |        | 0.00      |     |
| 4.00     | .           | COMPUTER BALANCE - PAS | 0.00   |   |        |        | 0.00      |     |
| 4.00     | .           | RUBBER VALVE STEM      | 1.99   |   |        |        | 0.00      |     |
| 4.00     | .           | STATE TIRE TAX (FEE)   | 3.00   |   |        |        | 0.00      |     |

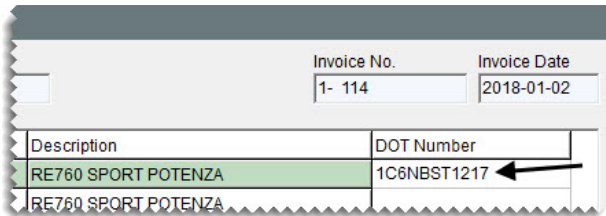
- b. Select Russell Smith, and click **OK**.



3. Click **Complete**. The DOT Information screen appears.



4. Record the DOT numbers.
  - a. For the first tire, type **1C6NBST1217**.



- b. Click **Copy DOT to the next line** three times.



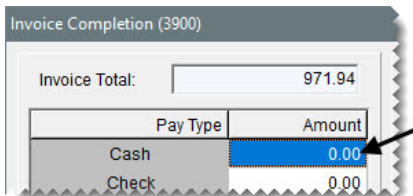
**Note:** If the DOT numbers for one or more of the other tires are different, you can type over the existing entries to make the needed changes.

- c. Click **OK**. The Invoice Completion screen appears.

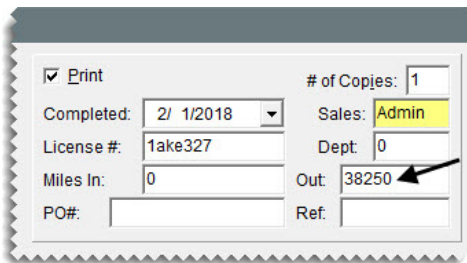


5. Enter the payment and vehicle mileage.

- a. Click the field for the **Cash** payment type, and press . The invoice amount is inserted for you.



- b. In the mileage **Out** field, type **38250**.



6. Complete and print the invoice.

- a. Click **OK**. A confirmation message appears.



- b. Click **Yes**. Depending on your point of sale print settings, the document prints or the Report Window opens and displays the invoice on the screen.

# Adding Information to Work Orders

You can add a variety of information to work orders, including notes for technicians, salesperson assignments, and promised job completion times.

## Walk-Through: Adding Information to Work Order

Start a work order for Cliff Phillips that includes the following information:

- ◆ Salesperson and technician assignments
- ◆ A note
- ◆ The job completion status
- ◆ The promised job completion time

When you're working with the order, you'll also preview the gross profit margin that will be earned.

### To add information to work orders

1. Start the work order.
  - a. If the Open Work Order List isn't already open, click **Invoicing**.

Invoicing

- b. Click **New Work Order**. The Name Lookup Entry screen appears.



2. Look up the customer and vehicle.
  - a. Leave name field blank and click **OK**. The Customer List appears.

A screenshot of the 'Name Lookup/Entry (2300)' form. It contains several input fields: 'Enter Name:', 'License #:', 'Phone # (Last 4):', 'Customer #:', 'Unit #:', and 'VIN #:'. There are also two checked checkboxes: 'Active Only' and 'Search All Site'. At the bottom, there are 'OK' and 'Cancel' buttons. An arrow points to the 'OK' button.

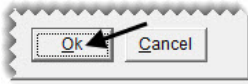
- b. Select Cliff Phillips and click **OK**. The Customer Maintenance screen appears.

A screenshot of the 'Customer List (500)' table. The table has four columns: Site#, Cust#, Name, and Address1. The row for Cliff Phillips is highlighted in blue. Below the table are 'List Edit', 'OK', and 'Cancel' buttons. An arrow points to the 'OK' button.

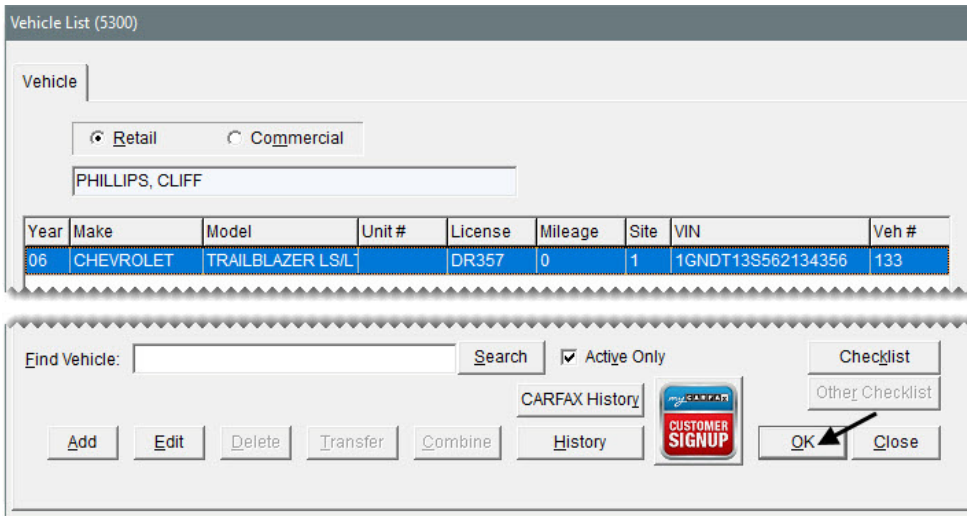
| Site# | Cust# | Name                 | Address1          |
|-------|-------|----------------------|-------------------|
| 1     | 154   | KELLER, FRANK        | 614 SUNSET RIM    |
| 1     | 156   | NATIONAL AUTO RENTAL | 6624 CANAL ST.    |
| 1     | 146   | OLIVER, KAREN        | 3540 MALIBU CT.   |
| 1     | 165   | PHILLIPS, CLIFF      | 9622 E. TOBOL DR. |
| 1     | 140   | QUINE, BRAD          |                   |

**Tip:** If you make a mistake when looking up a customer, you can click **Cancel** on the Customer List to return directly to the Name Lookup/Entry screen to resume your search.


- c. To accept the customer, click **OK**.

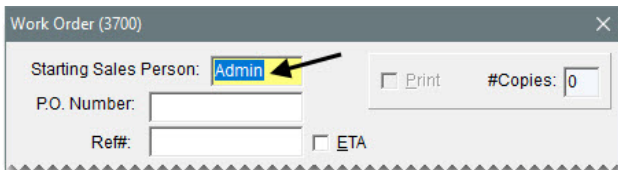


- d. Make sure the Chevy Trailblazer is selected, and click **OK**. The Work Order screen appears.

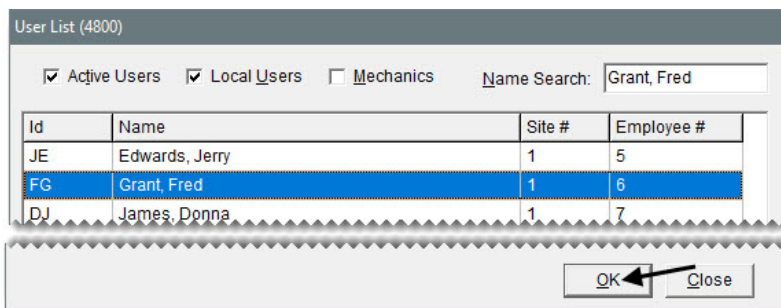


- 3. Assign a salesperson to the work order.

- a. Click the **Starting Salesperson** field, and press  to open a list of employees.



- b. Select Fred Grant, and click **OK**.



- c. Click **OK** to continue. The Invoice Entry screen opens.



4. Add an item to the work order.

- a. Click the **Size** field, type **2357516**, and press **Enter**. The Inventory List appears.

| Quantity | Size    | Description |
|----------|---------|-------------|
|          | 2357516 |             |

- b. Select the Firestone LE2 Destination tire (product code 140378), and click **OK**. The tire is added to the work order.

| Prod Code | Size         | Description          | Available | On Order | On WO | Best   | \$ |
|-----------|--------------|----------------------|-----------|----------|-------|--------|----|
| 88558     | P235/75R16XL | CROSS COUNTRY LAREDO | 4         | 0        | 0     | 153.18 |    |
| 22027     | P235/75R16XL | TOUR LONG TRAIL T/A  | 4         | 0        | 0     | 161.27 |    |
| 140378    | P235/75R16XL | LE2 DESTINATION      | 8         | 0        | 0     | 163.30 |    |
| 35261     | P235/75R16XL | RUG TERRAIN T/A      | 4         | 0        | 0     | 165.48 |    |
| 027379    | P235/75R16   | AT DESTINATION       | 12        | 0        | 0     |        |    |

- c. Type **4** in the quantity field, and press **Enter**.

| Quantity | Size         | Description     |
|----------|--------------|-----------------|
| 4        | P235/75R16XL | LE2 DESTINATION |

5. Delete the disposal.

- a. Select the row for the disposal item, and click **Delete**. A confirmation message appears.

| Quantity | Size         | Description            | Parts  | Labor | Ft |
|----------|--------------|------------------------|--------|-------|----|
| 4.00     | P235/75R16XL | LE2 DESTINATION        | 163.30 | 0.00  |    |
| 4.00     | .            | COMPUTER BALANCE - LT  | 0.00   | 12.99 |    |
| 4.00     | .            | RUBBER VALVE STEM      | 1.99   | 0.00  |    |
| 4.00     | .            | STATE TIRE TAX (FEE)   | 3.00   | 0.00  |    |
| 4.00     | .            | LT ROAD HAZARD WARRANT | 16.33  | 0.00  |    |
| 4.00     | .            | TIRE DISPOSAL - LT.    | 3.00   | 0.00  |    |

No Status  
 On Site

- b. Click **Yes**.

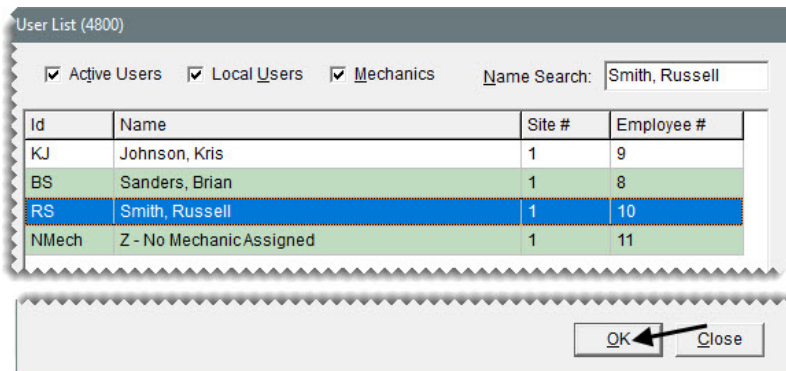
6. Assign a technician to the order.

- a. Click the **Mech 1** field, and press **[F2]**. The User List appears.

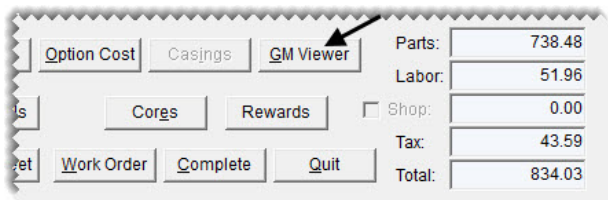
| Sales | Mech 1 | Mech 2 | Flat Rate | Cor |
|-------|--------|--------|-----------|-----|
| 3.20  | FG     |        | 0.00      |     |
| 1.96  | FG     |        | 0.00      |     |
| 7.96  | FG     |        | 0.00      |     |



- b. Select Russell Smith, and click **OK**.



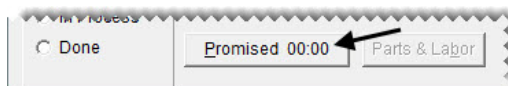
- 7. To preview the gross profit margin for the order, click **GM Viewer**. When you're done looking at the numbers, close the GM Viewer.



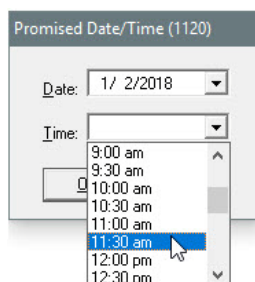
- 8. Set the status and promised job-completion time.
  - a. For the status, make sure **On Site** is selected.



- b. Click **Promised 00:00**. The Promised Date/Time screen appears.



- c. Leave the date alone.
    - d. Select 11:30 AM from the **Time** drop-down.



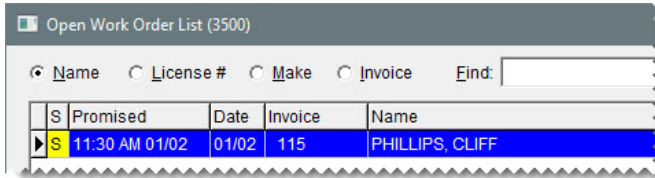
- e. Click **OK**.

9. Review the status and promised time on the Open Work Order List.

- a. To exit the work order, click **Quit**.



- b. Look at the color coding and entries in the **S** and **Promised** columns.



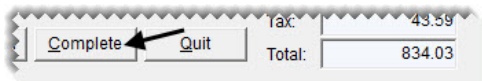
**Note:** The color codes for the status (S column) are user defined on the work order status setup screen. If the promised time is within a user-defined number of minutes, the color in the **Promised** column will be yellow. If the promised time has passed, it will be red. To define when the promised time should turn yellow, you need to set a system control.

### Walk-Through: Completing a Manual Credit Card Sale

Complete the invoice for Cliff Phillips, processing the sale as a credit card transaction. Before you process the customer's VISA card, record the DOT numbers for the tires and the vehicle's ending mileage. Then e-mail the invoice to the customer.

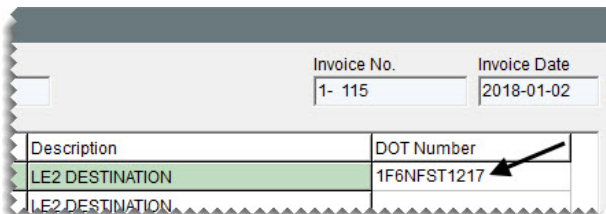
#### To complete a credit card sale

1. Retrieve the work order for Cliff Phillips.
2. On the Invoice Entry screen, click **Complete**. The DOT Information screen appears.



3. Record the DOT numbers for the tires.

- a. Type the DOT number **1F6NFST1217** for the first tire listed.




- b. Click **Copy DOT to the next line** repeatedly until the DOT numbers are filled in for all of the tires.

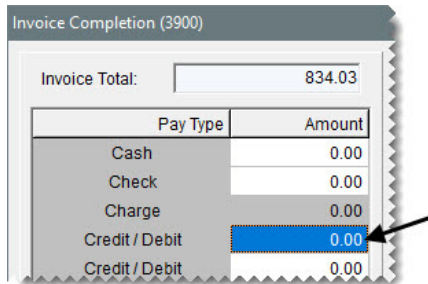


- c. Click **OK**. The Invoice Completion screen appears.

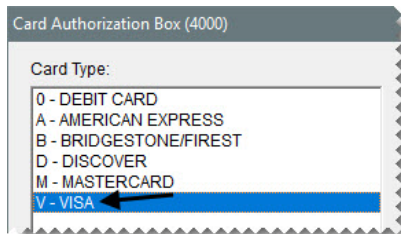


4. Record the credit card information.

- a. Click the first **Credit/Debit** payment row and press . The Card Authorization Box appears.



- b. Select the Visa payment type.

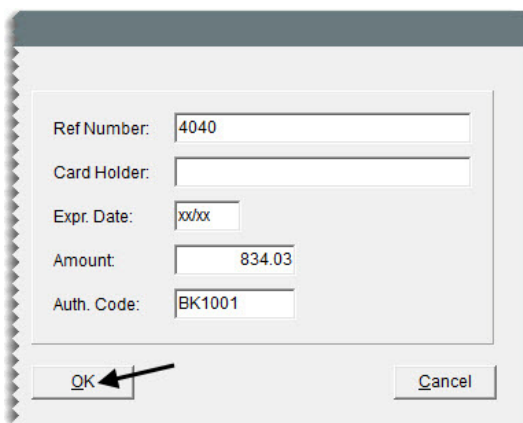


- c. For the reference number, type **4040**.

- d. For the authorization code, type **BK1001**.

**Note:** You can disregard entering the card holder's name and the expiration date.

- e. Click **OK**.



5. Complete the invoice and send a copy to the customer.

- a. Make sure the entry in the **#Copies** field is 0.

- b. For the ending mileage, type **97823**.

A screenshot of a software form. It has a 'Print' checkbox which is checked. To its right is a '# of Copies' field with '0'. Below 'Print' is a 'Completed' dropdown menu showing '1/ 3/2018'. To its right is a 'Sales' field with 'FG'. Below 'Completed' is a 'License #' field with 'DR357'. To its right is a 'Dept.' field with '0'. Below 'License #' is a 'Miles In' field with '0'. To its right is an 'Out' field with '97823'. Below 'Miles In' is a 'PO#' field. To its right is a 'Ref.' field.

- c. Click **OK**. TireMaster prompts you to complete and print the invoice.

A screenshot of a dialog box with three buttons: 'Marketing', 'OK', and 'Cancel'. An arrow points to the 'OK' button.

**Note:** If the unchanged mileage message appears, click **Yes** to continue.

- d. Click **Yes**. The Report Window opens and displays a copy of the invoice.
6. E-mail the invoice to the customer.
- a. Click **E-mail**. The Select E-Mail screen opens.

A screenshot of a toolbar with buttons for 'Find', 'Next', 'Export', 'E-Mail', 'Print', 'Setup', and 'Close'. An arrow points to the 'E-Mail' button.

- b. Type **cphillips@fakemail.com** in the **Email** field and click **OK**.

A screenshot of an email selection dialog box. It has an 'Email:' label followed by a text field containing 'cphillips@fakemail.com'. To the right of the text field is an 'OK' button. An arrow points to the 'OK' button.

- 7. Close the open screens.

## Adding Customers and Vehicles

In addition to creating work orders, one of the most commonly performed tasks in TireMaster is adding new customers. You can set up new customer accounts as a standalone operation or at point of sale.

### Customer Types

When you add a new customer, you need to define a customer type for the client. Customer types are used to classify customers. Examples of customer types include retail, national-account, transfer, and wholesale.

Customer types define how sales to a customer post to the general ledger, and you can use customer types to organize information on several reports. Customer type assignments also affect the point of sale work flow. When you start a work order, TireMaster looks at the options settings (Figure 12) for the customer's type to determine the following:

- ♦ Whether you'll be prompted to select a vehicle

- ◆ Whether you'll be prompted to select a tax level
- ◆ Whether to include add-on items on the work order

| Accounts     |      |      |
|--------------|------|------|
| AR Acct:     | 1100 | 100  |
| AP Acct:     | 2000 | 100  |
| AR Dis Acct: | 4600 | 0    |
| AP Dis Acct: | 5600 | 0    |
| Exp. Acct:   | 9999 | 9999 |

Options:

Charge     Ship-To     Addons  
 Vehicle     Tax Select     Wholesale  
 FET Exempt     Direct Deposit  
 Price Levels for National/GS

Department: 1

*Figure 12: Type Settings for Retail Customers*

## Walk-Through: Adding a Customer and Vehicle at Point of Sale

Lori Jones brought her sedan in for an inspection, because the temperature warning light is on and she's noticed fluid leaking from the vehicle. Jones is a new customer. Therefore, you need to create her customer record when you start the work order.

### To add a customer and vehicle at point of sale

1. Start a work order.
  - a. If the Open Work Order List isn't already open, click **Invoicing**.

Invoicing

- b. Click **New Work Order**. The Name Lookup Entry screen appears.



- c. Type the name **Jones, Lori** and click **OK**. The message, “No matches found” appears.

- d. Click **OK** to close the message. The Customer Maintenance screen appears.

2. Add the new customer.

- a. Click **Add**. The Name Lookup Entry screen appears with the customer’s name filled in.

- b. Click **OK**.

3. Add the customer’s address and phone number.

- a. In the **Address** field, type **650 State St. N**.
- b. Type the zip code **83701**, and click **OK** when the Zip Codes screen appears. The city and state fill in for you.

- c. Select Cell Phone from the first **Contact Type** drop-down. Then type the number **208-555-1001** and the name **Lori Cell**.

Information [Prev] [Next]

Cust#: [ ] 1 [ ] 214

|                |                 |           |
|----------------|-----------------|-----------|
| Contact Type   | Number / E-Mail | Name      |
| Cell Phone     | 208-555-1001    | Lori Cell |
| Business Phone |                 |           |

- 4. Verify that the customer is assigned the retail customer type.
  - a. Click the **Type** field, and press . The Customer/Vendor Type List appears.

|  |                      |                 |
|--|----------------------|-----------------|
| <input checked="" type="checkbox"/> Taxable        | Tax Level - Parts: 1 | Labor: 1        |
| <input checked="" type="checkbox"/> Cash Only      | Price Level: [ ]     | Ar/Ar: AR       |
| <input checked="" type="checkbox"/> Statement      | Type: 1              | Commission: [ ] |
| <input checked="" type="checkbox"/> Finance Charge | Tax ID: [ ]          |                 |
| <input checked="" type="checkbox"/> Open Item AR   |                      |                 |

- b. Make sure type 1 for retail customers is selected.
  - c. Close the Customer/Vendor Type List.
- 5. Click **OK** to save the new customer.

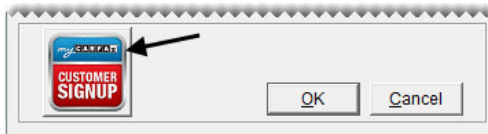
- 6. Add the customer's vehicle.
  - a. Click **OK** again to open the Vehicle List.

- b. Click **Add**. The Retail Vehicle screen appears.

- c. Type the license plate number **AILEY**, make sure **ID** is entered for the state, and click **CARFAX Search**. The vehicle year, make, and model information fills in automatically.

The screenshot shows a window titled "Retail Vehicle (700)". It contains several input fields: "Veh#" with "1", "Cust#" with "1" and "214", "Year:", "Make:" with a "Choose" button, "Model:", "Sub:", "License#" with "AILEY", "State" with "ID", and "VIN:". A "CARFAX Search" button is located at the bottom right, with an arrow pointing to it.

**Tip:** The myCARFAX Customer Signup tool at the bottom of the Vehicle List and the retail Vehicle screen allows you to register customers for myCARFAX. With myCARFAX, customers receive service reminders and a list of shops they've previously visited including yours. Customers must provide verbal authorization and an e-mail address to sign up. When you sign them up, your store is listed as their favorite shop on the service reminders.



The screenshot shows a dialog box titled "myCARFAX Signup". It features the myCARFAX logo at the top. Below the logo is a text area with the following text: "myCARFAX is the new, free app from CARFAX that makes taking care of your car easy", "\*Be the first to know about open recalls that may affect the safety of your vehicle.", "\*Get timely alerts when your car is due for service.", "\*Track your car's service history.", and "\*Find out how much your car is worth!". Below this text are two input fields: "Email" and "Vin" with the value "3N1AB7AP9EY246452". A checkbox is checked, with the text "By creating the 'myCARFAX Account' on behalf of the customer, you acknowledge that you have the customer's verbal agreement to do so." At the bottom, there is a myCARFAX CUSTOMER SIGNUP button and a "Close" button.



- d. Click **OK** to close the Retail Vehicle screen.

- e. Click **OK** to close the Vehicle List. The Work Order screen appears.

- 7. Assign the salesperson and add a note.

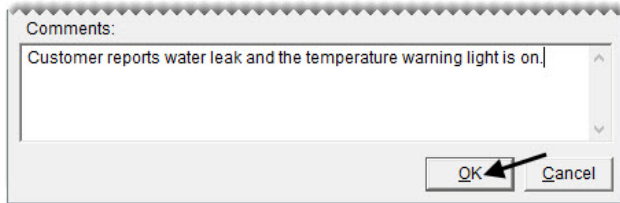
- a. Click the **Starting Salesperson** field, and press . The User List appears.

- b. Select Donna James, and click **OK**.

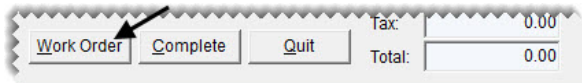
| Id | Name           | Site # | Employee # |
|----|----------------|--------|------------|
| JE | Edwards, Jerry | 1      | 5          |
| FG | Grant, Fred    | 1      | 6          |
| DJ | James, Donna   | 1      | 7          |
| KJ | Johnson, Kris  | 1      | 9          |

- c. In the **Comments** field, type **Customer reports water leak and the temperature warning light is on.**

- d. Click **OK**. The Invoice Entry screen appears.



8. Print a copy of the work order for the shop.
  - a. Click **Work Order**. The Work Order screen appears.



- b. Click **OK**. Depending on your point of sale print settings, the document prints or the Report Window opens and displays the work order on the screen.

## Reversing Invoices

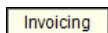
If you make an error on a customer's invoice, you can reverse it. Then you can automatically create a new work order with the same items and quantities, if needed.

### Walk-Through: Reversing an Invoice

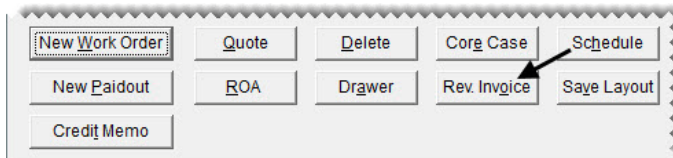
When Dan Walker paid for an oil change, he used a check (number 1299). However, the transaction was completed as a cash sale. Reverse the original invoice and create a replacement using the correct payment method.

#### To reverse an invoice

1. If the Open Work Order List isn't already open, click **Invoicing**.



2. Click **Rev. Invoice**. A confirmation message appears.



3. Click **Yes**. The Name Lookup/Entry screen appears.

4. Type **walker, Dan** and click **OK**. The Customer Maintenance screen appears.



Name Lookup/Entry (2300)

Enter Name: Walker, Dan

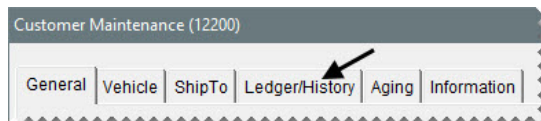
License #:  Phone # (Last 4):

Customer #:  Unit #:

VIN #:

Active Only  
 Search All Site

5. Click the **Ledger/History** tab. A list of the customer's completed transactions appears.

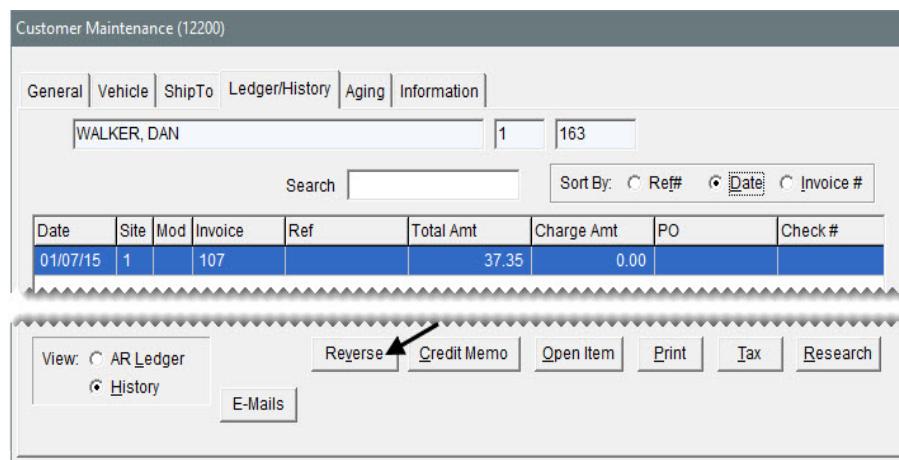


Customer Maintenance (12200)

General | Vehicle | ShipTo | Ledger/History | Aging | Information

**Tip:** To look at a duplicate copy of an invoice before reversing it, select it and click **Print**. Then select **Print selected item**, and click **OK**.

6. Select the invoice, and click **Reverse**. A confirmation message appears.



Customer Maintenance (12200)

General | Vehicle | ShipTo | Ledger/History | Aging | Information

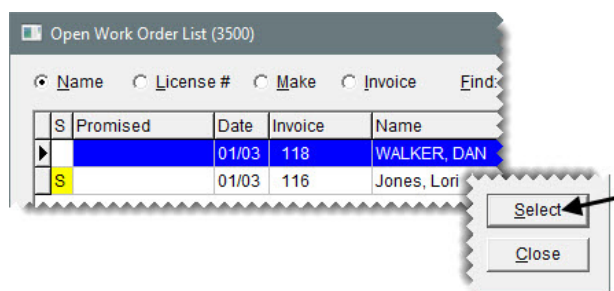
WALKER, DAN 1 163

Search  Sort By:  Ref#  Date  Invoice #

| Date     | Site | Mod | Invoice | Ref | Total Amt | Charge Amt | PO | Check # |
|----------|------|-----|---------|-----|-----------|------------|----|---------|
| 01/07/15 | 1    |     | 107     |     | 37.35     | 0.00       |    |         |

View:  AR Ledger  History

7. Click **Yes**. TireMaster asks if you want to create a duplicate of the reversed invoice.
8. Click **Yes**. The Open Work Order List appears.
9. Complete the duplicate invoice.
  - a. Select the work order for Dan Walker, and click **Select**. The Invoice Entry screen appears.

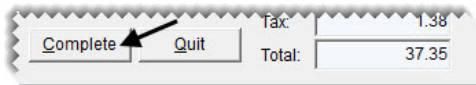


Open Work Order List (3500)

Name  License #  Make  Invoice Find:

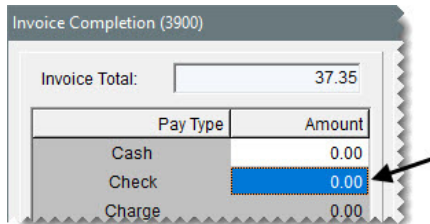
| S | Promised | Date  | Invoice | Name        |
|---|----------|-------|---------|-------------|
|   |          | 01/03 | 118     | WALKER, DAN |
| S |          | 01/03 | 116     | Jones, Lori |

- b. Click **Complete**. The Invoice Completion screen appears.

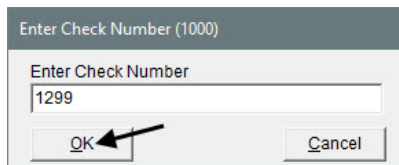


10. Process the check payment for the duplicate invoice.

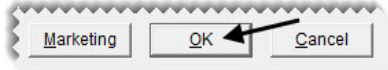
- a. Click the **Check** payment row and press  to insert the full invoice amount. TireMaster prompts you for the check number.



- b. Type check number **1299** and click **OK** to return to the Invoice Entry screen.



- c. Click **OK**. TireMaster prompts you to complete and print the invoice.



**Note:** If the mileage prompt appears, click **Yes** to continue.

- d. Click **Yes**. The Report Window opens and displays a copy of the invoice.  
e. Close the Report Window.

## Exercise

When Debbie Ericks replaced the starter for her car, the cost of the part was entered incorrectly (two numbers were transposed). Reverse the original invoice. Then create a replacement and enter the item's correct cost, which is \$135.57.

**Note:** Disregard creating a new receiving document when you correct the cost, and process the replacement invoice as a cash transaction.

# Handling Payments for Special Orders

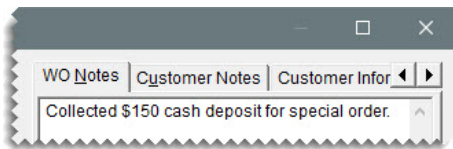
If you require a partial payment from a customer who places a special order, you can record the money down by adding a deposit to the customer's work order.

## Walk-Through: Adding Deposit to Work Orders

Norman Iman has agreed to give you a \$150 deposit for a set of Cooper tires that you'll order for his Fiat. To handle the prepayment, you need to add a cash deposit to the work order that includes the special order items.

### To add deposits to work orders

1. Start a work order for Norman Iman, and select the Fiat.
2. On the **Work Order Notes** tab (Invoice Entry screen), type **Collected \$150 cash deposit for special order**.



3. Add the special order tires to the work order.
  - a. To look up the item for non-stock passenger tires, type **Non** in the **Size** field and press **Enter**. Then select the non-stock passenger tire from the Inventory List and click **OK**. The item is added to the work order.

| Quantity | Size | Description |
|----------|------|-------------|
|          | Non  |             |

**Note:** The row for the non-stock tire will remain pink until you enter item's cost.

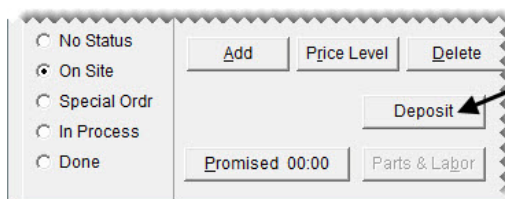
- b. Change the quantity to **4** and press **Enter**. The add-on items appear.

| Quantity | Size | Description          |
|----------|------|----------------------|
| 4        |      | NON-STOCK PASS. TIRE |

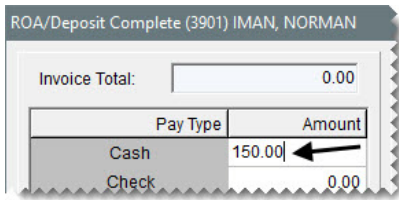
- c. Change the description to **Cooper CS5 Ultra Touring 225/45R17**.
- d. For the parts price, type **102.00**.

| Quantity | Size | Description                        | Parts  | Labor | FET  | Tax   |
|----------|------|------------------------------------|--------|-------|------|-------|
| 4.00     |      | Cooper CS5 Ultra Touring 225/45R17 | 102.00 | 0.00  | 0.00 | parts |
| 4.00     |      | COMPUTER BALANCE - PAS             | 0.00   | 11.99 | 0.00 | parts |

4. Add the deposit to the work order.
  - a. Click **Deposit**. The ROA/Deposit Complete screen appears.



- b. Type **150.00** in the **Cash** field.




- c. Click **OK**. TireMaster prompts you to complete and print the deposit.



- d. Click **Yes**. Depending on your work order print settings, the deposit invoice prints or the Report Window opens and displays the document on the screen.
- e. Click **Quit** to close the Invoice Entry screen.



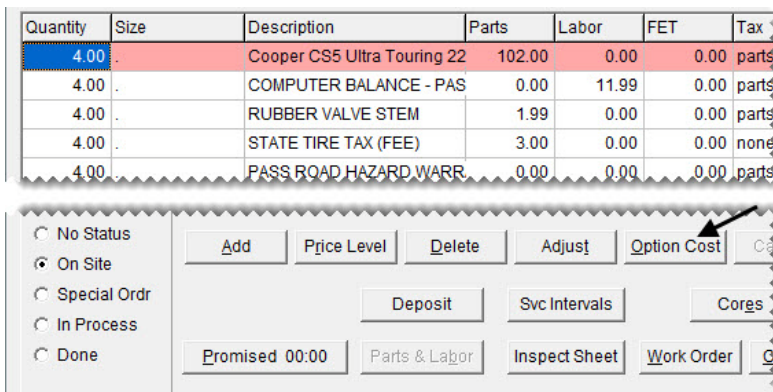
**Note:** The total on the Invoice Entry screen still reflects the full total due. However, when you click **Complete** and press  for the tender type, you will see the amount changes to the balance due.

### Walk-Through: Completing Special Order Invoices with Deposits

When the special order tires arrive, enter the selling price and cost of the tires and complete the invoice. The customer pays for the remainder of the balance with a check.

#### To complete special order invoices with deposits

1. Retrieve the work order for the special order tires.
2. Enter the cost of the tires.
  - a. Make sure the row for the tire is selected, and click **Option Cost**. The Option Cost screen appears.



- b. For the cost, type **79.00**.

- c. Clear the **Put item on a receiving document** check box.
- d. Click **OK**. The row for the special order tires turns green.

- 3. Complete the invoice for the special order tires.
  - a. Click **Complete**.

- b. To disregard the mechanic message, click **Yes**. The DOT Information screen appears.
- c. Type the number **F9BFC001217**, and click **Copy DOT to the next line** for each additional tire. Then click **OK**. The Invoice Completion screen appears.

| Num | Product Code | Size | Description                        | DOT Number  |
|-----|--------------|------|------------------------------------|-------------|
| 1   | 20           | .    | Cooper CS5 Ultra Touring 225/45R17 | F9BFC001214 |
| 2   | 20           | .    | Cooper CS5 Ultra Touring 225/45R17 | F9BFC001214 |
| 3   | 20           | .    | Cooper CS5 Ultra Touring 225/45R17 | F9BFC001214 |
| 4   | 20           | .    | Cooper CS5 Ultra Touring 225/45R17 | F9BFC001214 |

- d. Click the **Check** amount field and press  to insert the remaining invoice balance. TireMaster prompts you for a check number.
- e. Type **1590** and click **OK**.
- f. For the ending mileage, type **67227**.

- g. Click **OK**. TireMaster prompts you to complete and print the invoice.

Invoice Completion (3900)

Invoice Total: 513.60

| Pay Type       | Amount |
|----------------|--------|
| Cash           | 0.00   |
| Check          | 363.60 |
| Credit / Debit | 0.00   |

Deposit: 150.00

Total Tended: 513.60

Change Due: 0.00

Print # of Copies: 0

Completed: 1/ 3/2018 Sales: Admin

License #: ZIPPY1 Dept: 0

Miles In: 0 Out: 67227

Comments:  
Collected \$150 cash deposit for special order.

Marketing OK Cancel

- h. Click **Yes**. Depending on your work order print settings, the invoice prints or the Report Window opens and displays the invoice on the screen.
4. Close the Open Work Order List.



# Writing Quotes

When customers want to know how much new tires will cost, you have a variety of options for providing that information. This chapter includes the following topics:

- ◆ “Quick Quotes” on page 35
- ◆ “Basic Quotes” on page 36
- ◆ “Good, Better, Best Comparison Quotes” on page 38
- ◆ “Price Comparison Quotes” on page 43
- ◆ “Turning Quotes into Work Orders” on page 47

## Quick Quotes

You can easily tell customers the price of one, two, or four quantities of an item by giving them a quick quote. Prices on a quick quote include add-ons and sales tax, which is calculated based on your default tax settings. Quick quotes are useful for providing information over the phone.

### Walk-Through: Giving a Quick Quote

Give a caller a quick quote for a size 175/65R15 tire.

#### To give a quick quote

1. Click **Inventory**. The Custom Inventory Lookup screen appears.

- In the **Quick Look** field, type **1756515** (the tire's size without the letters and slash), and click **OK**. The Inventory List appears.

Custom Inventory Lookup (8100)

Past Lookups: [Dropdown]

1 Standard | 2 Receiving | 3 Pricing | 4 Editing | 5 Other

| Prompt          | Start   | End |
|-----------------|---------|-----|
| 3 - Quick Look: | 1756515 |     |
| Description:    |         |     |

Clear | OK | Cancel

- Select the row for the Sport Pilot tire, and click **Quick Quote**. The Quick Quote screen appears.

Inventory List (2000)

| Prod Code | Size          | Description      | Available | On Order | On WO | Best   |
|-----------|---------------|------------------|-----------|----------|-------|--------|
| 89600     | 175/65R15     | NT TP TOURING    | 6         | 0        | 0     | 113.19 |
| 738609571 | P175/65R15/SL | FUELMAX ASUR     | 8         | 0        | 0     | 129.23 |
| 144492    | 175/65R15     | EP422 ECOPIA     | 4         | 4        | 0     | 133.46 |
| 001483    | 175/65R15     | EP150 ECOPIA     | 4         | 4        | 0     | 136.30 |
| 01932     | 175/65R15     | AS 3 SPORT PILOT | 4         | 0        | 0     | 140.00 |
| 36174     | 175/65R15XL   | XI3 X-ICE        | 4         | 0        | 0     | 142.98 |

History | List Edit | Quote | Specs | Quick Quote | Save Layout

- Review the prices and on-hand quantity for the tire. To close the Quick Quote screen, click **OK**.

Quick Quote (5500)

Item:

01932 AS 3 SPORT PILOT 140.00

Add-On(s):

| ProdCode       | Description                 | Best  |
|----------------|-----------------------------|-------|
| 16             | TIRE DISPOSAL - PASS.       | 3.00  |
| 21             | STATE TIRE TAX (FEE)        | 3.00  |
| 29             | COMPUTER BALANCE - PASS.    | 11.99 |
| 34             | RUBBER VALVE STEM           | 1.99  |
| SRV:WAR1F14.00 | PASS ROAD HAZARD 'WAR14.00' | 14.00 |

Sales Tax: 9.54    Add-On Total: 33.98

One Unit: 183.52    Four Units: 734.08  
Two Units: 367.04    On Hand: 4.00

Shop Supplies    OK

- Close the open screens.

## Basic Quotes

When customers ask for price information, the best practice is to provide them with written quotes that can be saved and retrieved when they're ready to purchase products and services.

## Walk-Through: Creating a Basic Quote

Bob Adams wants to know how much a set of tires for his 2006 Ford Mustang will cost. Create a basic quote for Mr. Adams and print a copy for him.

### To create a basic quote

1. Press **F12**. The Quote and Estimate Writer opens.



2. Record the customer and vehicle information.
  - a. Type **Adams, Bob** in the **Customer** field.
  - b. In the **Vehicle** field, type **2006 Ford Mustang**.
  - c. In the **Contact** field, type **208-555-1989**.

3. Look up a compatible tire with the fitment guide.
  - a. Click **Fitment**. The Tire and Vehicle Information screen appears.

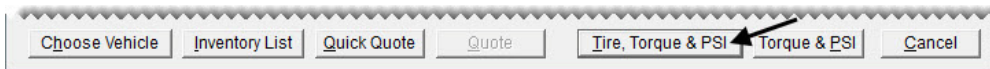
- b. Select **Base** from the drop-down for vehicle options.

| Year | Make | Model   | Option     | Size        | Inflate | Load | Speed | Torque | WBC       |
|------|------|---------|------------|-------------|---------|------|-------|--------|-----------|
| 2006 | Ford | Mustang | GT Premium | P235/55ZR17 | B-32/32 | 98   | W     | 100    | 5-114.3   |
| 2006 | Ford | Mustang | GT Premium | P235/50ZR18 | B-32/32 | 97   | W     | 100    | 5-114.3mm |

- c. From the list of **Matching Items**, select the Tiger Paw tire (product code 31156).

| Matching Items |                               |           |        |            |      |     |
|----------------|-------------------------------|-----------|--------|------------|------|-----|
| Product Code   | Size / Description            | Available | Best   | Load/Speed | UTQG | MFG |
| 407016374      | 215/65R16/SL / ASSURANCE AS   | 8         | 114.67 |            |      | GDY |
| 040741         | 215/65R16 / PLUS WEATHERFORCE | 4         | 121.07 |            |      | BRI |
| 766016355      | 215/65R16/SL / ULTRA WINTER   | 4         | 121.31 |            |      | GDY |
| 738016571      | 215/65R16/SL / FUELMAX ASUR   | 8         | 122.08 |            |      | GDY |
| 008858         | 215/65R16 / TOUR FUZION       | 4         | 127.89 |            |      | FUZ |
| 27163          | 215/65R16 / NT TP TOURING     | 4         | 131.43 |            |      | UNI |
| 81499          | P215/65R16 / SPEC TRAC TA     | 4         | 134.99 |            |      | BFG |
| 399159349      | 215/65R16/SL / A/S TRPLTRED   | 8         | 135.29 |            |      | GDY |
| 31156          | 215/65R16 / AWP II T/PAW      | 4         | 135.83 |            |      | UNI |
| 780560350      | 215/65R16/SL / ULGP ICE WRT   | 4         | 137.31 |            |      | GDY |
| 048136         | 215/65R16 / FR710             | 4         | 140.68 |            |      | FIR |

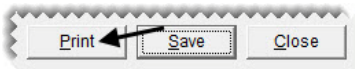
- d. Click **Tire, Torque & PSI**. The tire is added to the quote.



- 4. Change the quantity of the tire to **4** and press **Enter**. TireMaster updates the quantities of the add-on items.

| Q | Auth                                | Incl                                | Qty | Size         | Description           |
|---|-------------------------------------|-------------------------------------|-----|--------------|-----------------------|
| - | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |     | Quote Name 1 |                       |
| - | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 4   | 215/65R16    | AWP II T/PAW          |
|   | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 1   |              | TIRE DISPOSAL - PASS. |

- 5. Save and print the quote.
  - a. Click **Save**.
  - b. Click **Print**. The Report Window opens.



- c. Print the quote and close the Report Window.
- 6. Close the Quote and Estimate Writer screen.

## Good, Better, Best Comparison Quotes

You can compare competing brands by creating good, better, best quotes. In this scenario, quotes can be used to compare prices, tread life ratings, or both for multiple tires. All of the quoted items are displayed on the screen at the same time, and information for all of the quoted items is included on one printout.

### Walk-Through: Creating a Good, Better, Best Quote

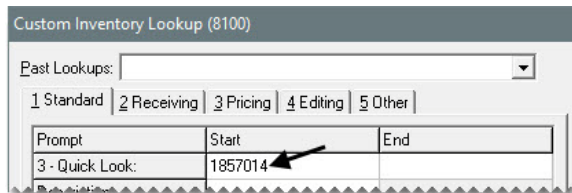
Carol Burns wants to compare the prices of tires for her 2001 Honda Civic LX. Create a comparison quote for three size P185/70R14 tires. The quoted prices will be good for one week.

**To create a good, better, best quote**

1. Look up three tires whose prices and expected tread life you want to compare.
  - a. Click **Inventory**. The Custom Inventory Lookup screen appears.



- b. Type **1857014** in the **Quick Look** field.



- c. Type **B** in the **Sort** field, and select the **Descending** check box to organize the items retrieved by best price from highest to lowest.



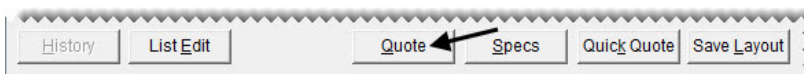
- d. Click **OK**. The Inventory List appears.

2. Choose the tires you want to compare.

- a. Select the Defender tire. Then press the **Ctrl** key and select the T/A Advantage and Assurance tires (in that order).

| Prod Code | Size         | Description    | Available | On Order | On WO | Best   |
|-----------|--------------|----------------|-----------|----------|-------|--------|
| 79790     | 185/70R14    | XI2 X-ICE      | 4         | 0        | 0     | 165.98 |
| 27985     | 185/70R14XL  | XI3 X-ICE      | 4         | 0        | 0     | 158.98 |
| 85842     | 185/70R14    | DEFENDER       | 4         | 0        | 0     | 146.37 |
| 28653     | P185/70R14   | T/A ADVANTAGE  | 4         | 0        | 0     | 125.71 |
| 113671    | 185/70R14    | WINTERFORCE    | 4         | 0        | 0     | 117.98 |
| 92003     | 185/70R14    | II ICE&SNOW TP | 4         | 0        | 0     | 117.98 |
| 04910     | P185/70R14   | AWP II T/PAW   | 4         | 0        | 0     | 115.80 |
| 03525     | P185/70R14   | AWP II T/PAW   | 4         | 0        | 0     | 112.35 |
| 407476374 | 185/70R14/SL | ASSURANCE AS   | 12        | 0        | 0     | 92.59  |
| 766476355 | 185/70R14/SL | ULTRA WINTER   | 4         | 0        | 0     | 79.97  |

- b. Click **Quote**.



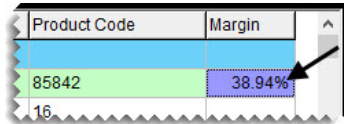
- c. Click **Yes** twice to close both of the default margin warnings. The Quote and Estimate Writer opens.

3. To enlarge the quote (top) panel, click .

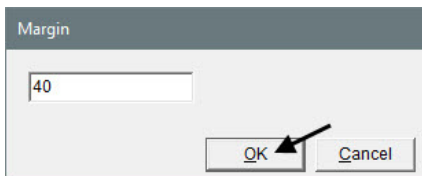
4. Adjust the margins for the tires that are below the 40 percent minimum.
  - a. Select the **View Margin** check box. A column for margins appears on the far right side of the quote panel.



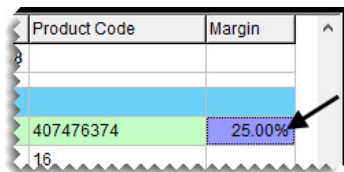
- b. Click the **Margin** field for the Defender tire, and press to open the Margin box.



- c. Type **40**, and click **OK**. The selling price is updated.



- d. Click the **Margin** field for the Assurance tire, and press to open the Margin box.



- e. Type **40**, and click **OK**. The selling price is updated.

5. Update the quantity, labeling, and add-ons for the first quoted item.

- a. Type the number **4** in the **Qty** column for the Defender tire, and press **Enter**. The quantities for the tire and the add-ons are updated.

| Auth                                | Incl                                | Qty | Size         | Description          | Parts  | Labor | Ft |
|-------------------------------------|-------------------------------------|-----|--------------|----------------------|--------|-------|----|
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |     | Quote Name 1 |                      |        |       |    |
| -                                   | <input checked="" type="checkbox"/> | 4   | 185/70R14    | DEFENDER             | 148.95 | 0.00  |    |
|                                     | <input checked="" type="checkbox"/> | 1   |              | TIRE DISPOSAL - PASS | 3.00   | 0.00  |    |

- b. Click the yellow field in the first row of the **Qty** column and press once to select *Good*.


| Auth                                | Incl                                | Qty  | Size         | Description         |
|-------------------------------------|-------------------------------------|------|--------------|---------------------|
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Good | Quote Name 1 |                     |
| -                                   | <input checked="" type="checkbox"/> | 4    | 185/70R14    | DEFENDER            |
|                                     | <input checked="" type="checkbox"/> | 4    |              | TIRE DISPOSAL - PAS |

- c. In the first row of the **Size** column, replace Quote Name 1 with **90,000 Mile Tread Life**.


| Auth                                | Incl                                | Qty  | Size                   | Description |
|-------------------------------------|-------------------------------------|------|------------------------|-------------|
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Good | 90,000 Mile Tread Life |             |
| -                                   | <input checked="" type="checkbox"/> | 4    | 185/70R14              | DEFENDER    |

- d. To remove the warranty add-on for the first tire, clear the check box in the **Incl** (include) column for the road hazard item. TireMaster updates the quote totals.

| Auth                                | Incl                                | Qty  | Size                   | Description          | Parts  | Labor | FET  | St |
|-------------------------------------|-------------------------------------|------|------------------------|----------------------|--------|-------|------|----|
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Good | 90,000 Mile Tread Life |                      |        |       |      |    |
| -                                   | <input checked="" type="checkbox"/> | 4    | 185/70R14              | DEFENDER             | 148.95 | 0.00  | 0.00 |    |
|                                     | <input checked="" type="checkbox"/> | 4    | .                      | TIRE DISPOSAL - PASS | 3.00   | 0.00  | 0.00 |    |
|                                     | <input checked="" type="checkbox"/> | 4    | .                      | STATE TIRE TAX (FEE) | 3.00   | 0.00  | 0.00 |    |
|                                     | <input checked="" type="checkbox"/> | 4    | .                      | COMPUTER BALANCE     | 0.00   | 11.99 | 0.00 |    |
|                                     | <input checked="" type="checkbox"/> | 4    | .                      | RUBBER VALVE STEM    | 1.99   | 0.00  | 0.00 |    |
|                                     | <input type="checkbox"/>            | 4    | .                      | PASS ROAD HAZARD V   | 14.89  | 0.00  | 0.00 |    |

6. Update the quantity, labeling, and add-ons for the second quoted item.
  - a. Type the number **4** in the **Qty** column for the T/A Advantage tire, and press **Enter**. The quantities for the tire and the add-ons are updated.
  - b. Click the yellow field in the first row of the **Qty** column and press  twice to select *Better*.
  - c. In the first row of the **Size** column, replace Quote Name 2 with **75,000 Mile Tread Life**.
  - d. To remove the warranty add-on for the second tire, clear the check box in the **Incl** (include) column for the road hazard item. TireMaster updates the quote totals.

| Auth                                | Incl                                | Qty    | Size                   | Description          | Parts  | Labor | FET  | St |
|-------------------------------------|-------------------------------------|--------|------------------------|----------------------|--------|-------|------|----|
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Better | 75,000 Mile Tread Life |                      |        |       |      |    |
| -                                   | <input checked="" type="checkbox"/> | 4      | P185/70R14             | T/A ADVANTAGE        | 125.71 | 0.00  | 0.00 |    |
|                                     | <input checked="" type="checkbox"/> | 4      | .                      | TIRE DISPOSAL - PASS | 3.00   | 0.00  | 0.00 |    |
|                                     | <input checked="" type="checkbox"/> | 4      | .                      | STATE TIRE TAX (FEE) | 3.00   | 0.00  | 0.00 |    |
|                                     | <input checked="" type="checkbox"/> | 4      | .                      | COMPUTER BALANCE     | 0.00   | 11.99 | 0.00 |    |
|                                     | <input checked="" type="checkbox"/> | 4      | .                      | RUBBER VALVE STEM    | 1.99   | 0.00  | 0.00 |    |
|                                     | <input type="checkbox"/>            | 4      | .                      | PASS ROAD HAZARD V   | 12.57  | 0.00  | 0.00 |    |

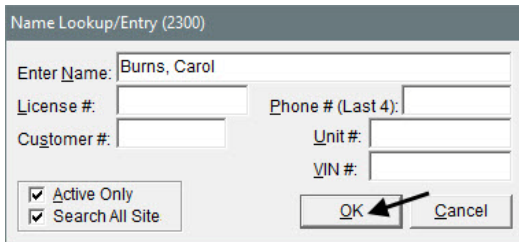
7. Update the quantity, labeling, and add-ons for the third quoted item.
  - a. Type the number **4** in the **Qty** column for the Assurance tire, and press **Enter**. The quantities for the tire and the add-ons are updated.
  - b. Click the yellow field in the first row of the **Qty** column and press  three times to select *Best*.
  - c. In the first row of the **Size** column, replace Quote Name 3 with **65,000 Mile Tread Life**.
  - d. To remove the warranty add-on for the third tire, clear the check box in the **Incl** (include) column for the road hazard item. TireMaster updates the quote totals.

| Auth                                | Incl                                | Qty  | Size                   | Description          | Parts  | Labor | FET  | St |
|-------------------------------------|-------------------------------------|------|------------------------|----------------------|--------|-------|------|----|
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Best | 65,000 Mile Tread Life |                      |        |       |      |    |
| -                                   | <input checked="" type="checkbox"/> | 4    | 185/70R14/SL           | ASSURANCE AS         | 115.73 | 0.00  | 0.00 |    |
|                                     | <input checked="" type="checkbox"/> | 4    | .                      | TIRE DISPOSAL - PASS | 3.00   | 0.00  | 0.00 |    |
|                                     | <input checked="" type="checkbox"/> | 4    | .                      | STATE TIRE TAX (FEE) | 3.00   | 0.00  | 0.00 |    |
|                                     | <input checked="" type="checkbox"/> | 4    | .                      | COMPUTER BALANCE     | 0.00   | 11.99 | 0.00 |    |
|                                     | <input checked="" type="checkbox"/> | 4    | .                      | RUBBER VALVE STEM    | 1.99   | 0.00  | 0.00 |    |
|                                     | <input type="checkbox"/>            | 4    | .                      | PASS ROAD HAZARD V   | 11.57  | 0.00  | 0.00 |    |

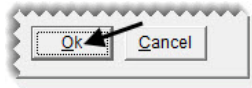
8. Add the customer and vehicle information to the quote.
  - a. Click **Customer**. The Name Lookup/Entry screen appears.



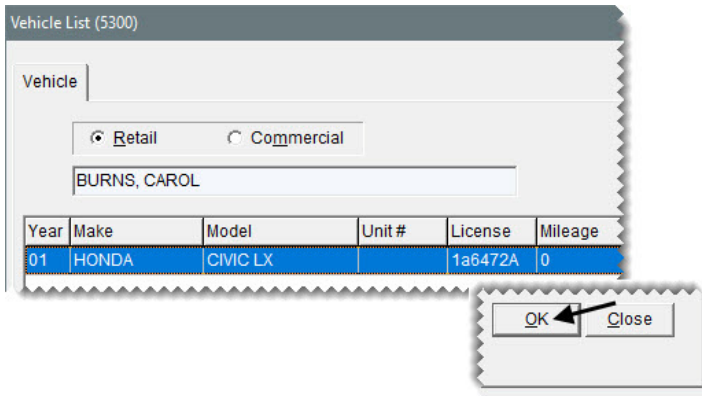
- b. Type **Burns , Carol** and click **OK**. The Customer Maintenance screen appears.



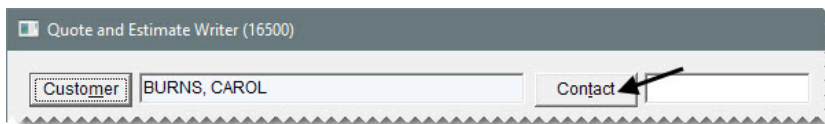
- c. Click **OK** to accept the customer. The Vehicle List appears.



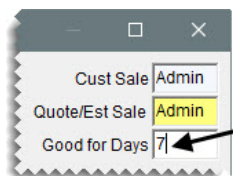
- d. Select the Honda Civic and click **OK**.



9. To add the customer's phone number to the quote, click **Contact** and select a phone number from the list that appears.



10. To set an expiration date for the quote, type the number **7** in the **Good for \_\_\_ days** field.





11. Save and print the good, better, best quote.
  - a. Clear the **Auth** (authorize) check box for each quote.

| Q | Auth                     | Incl                                | Qty    | Size                   | Description          | Parts  | Labor | P |
|---|--------------------------|-------------------------------------|--------|------------------------|----------------------|--------|-------|---|
|   | <input type="checkbox"/> | <input checked="" type="checkbox"/> | Good   | 90,000 Mile Tread Life |                      |        |       |   |
|   | -                        | <input checked="" type="checkbox"/> | 4      | 185/70R14              | DEFENDER             | 148.95 | 0.00  |   |
|   |                          | <input checked="" type="checkbox"/> | 4      |                        | TIRE DISPOSAL - PASS | 3.00   | 0.00  |   |
|   | <input type="checkbox"/> | <input checked="" type="checkbox"/> | Better | 75,000 Mile Tread Life |                      |        |       |   |
|   | -                        | <input checked="" type="checkbox"/> | 4      | P185/70R14             | T/A ADVANTAGE        | 125.71 | 0.00  |   |
|   |                          | <input checked="" type="checkbox"/> | 4      |                        | TIRE DISPOSAL - PASS | 3.00   | 0.00  |   |
|   | <input type="checkbox"/> | <input checked="" type="checkbox"/> | Best   | 65,000 Mile Tread Life |                      |        |       |   |
|   | -                        | <input checked="" type="checkbox"/> | 4      | 185/70R14/SL           | ASSURANCE AS         | 115.73 | 0.00  |   |
|   |                          | <input checked="" type="checkbox"/> | 4      |                        | TIRE DISPOSAL - PASS | 3.00   | 0.00  |   |

**Note:** When the authorization check box is clear, the printout shows only the totals for each quote. When the check box is selected, a grand total prints at the bottom of the page in addition to the individual quote totals.

- b. Click **Save**.
- c. Click **Print**. The Report Window opens and displays a copy of the quote.



- d. Print the quote and close the Report Window.

12. Close the open screens.

## Price Comparison Quotes

You can write quotes that let customers compare a variety of pricing options for a single item by assigning different add-on packages. For example, if you offer add-on packages for different types of tire warranties, you would add the same tire to a quote two or more times. Then you would assign a different add-on package to each instance of the tire.

You can also create price comparison quotes by excluding items or by deleting individual add-on items. In some cases, you might want to add extra items to the parent items on the quote instead.

### Walk-Through: Creating a Price Comparison Quote

Create a price comparison quote for John Ray. When you create the quote, look up a set of tires with the fitment guide. Then provide three different pricing options for the tires. The completed quote will include the following:

- ◆ The gold option, which includes a two-year warranty and an alignment
- ◆ The silver option, which includes a one-year warranty and an alignment
- ◆ The bronze option, the basic add-on package, which includes only the one year warranty.

## To create a price comparison quote

1. Press **F12**. The Quote and Estimate Writer opens.



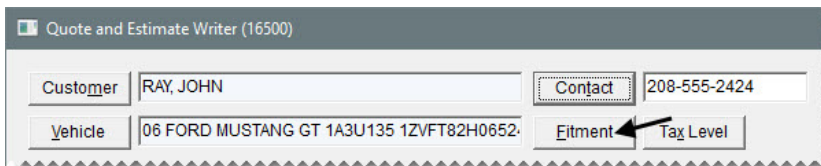
2. Define the customer, vehicle, and contact number.
  - a. Click **Customer**, and look up John Ray and his Ford Mustang.



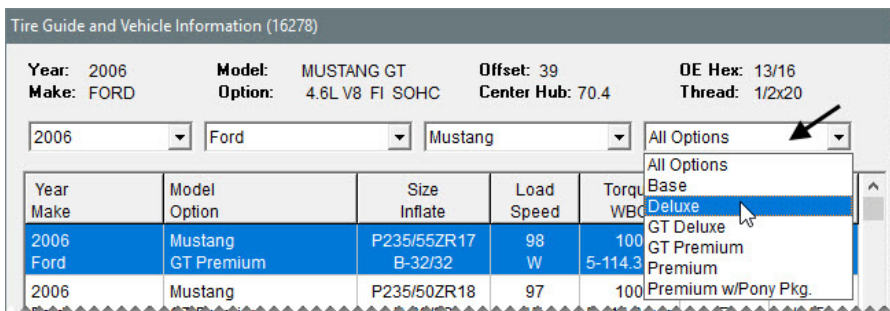
- b. Click **Contact** and select the customer's business phone number from the list that appears.



3. Look up a tire with the fitment guide.
  - a. Click **Fitment**. The Tire and Vehicle Information screen appears.



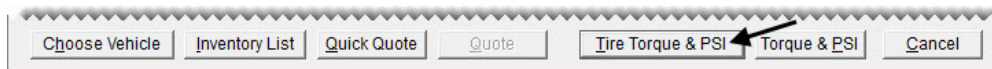
- b. Select Deluxe from the drop-down for vehicle options.



- c. From the list of **Matching Items**, select the Tour Fuzion tire.

| Product Code | Size / Description          | Available | Best   | Load/Speed | UTQG | MFG |
|--------------|-----------------------------|-----------|--------|------------|------|-----|
| 766016355    | 215/65R16/SL / ULTRA WINTER | 4         | 121.31 |            |      | GDY |
| 738016571    | 215/65R16/SL / FUELMAX ASUR | 8         | 122.08 |            |      | GDY |
| 008858       | 215/65R16 / TOUR FUZION     | 4         | 127.89 |            |      | FUZ |
| 27163        | 215/65R16 / NT TP TOURING   | 4         | 131.43 |            |      | UNI |

- d. Click **Tire Torque & PSI**. The tire is added to the quote.



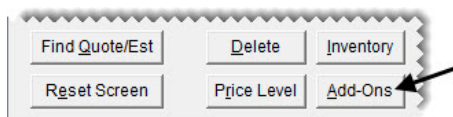
- 4. To enlarge the quote (top) panel, click .
- 5. To add two more quotes for the same tire, click **Duplicate Quote Line** *twice*.



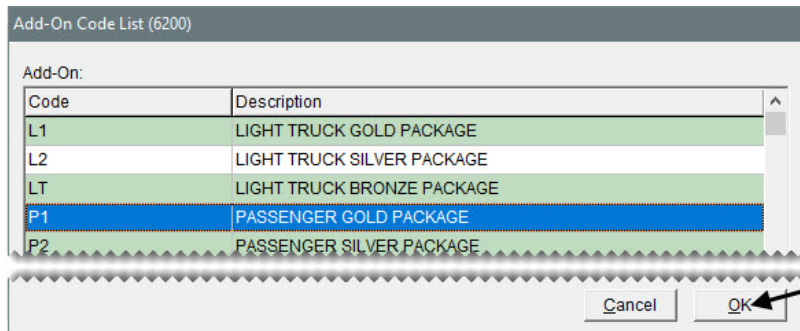
- 6. Change the name of the first quote and the add-on package assigned to it. Then update the quantities.
  - a. Type **Gold option** in the **Size** field.

| Q | Auth                                | Incl                                | Qty | Size        | Description |
|---|-------------------------------------|-------------------------------------|-----|-------------|-------------|
| - | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |     | Gold Option |             |
| - | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 1   | 215/65R16   | TOUR FUZION |

- b. Click **Add-Ons**. The Add-On Code List appears.



- c. Select the gold add-on package for passenger tires, and click **OK**. The add-on items for the first quote are updated.



- d. Change the quantity of the parent item to **4** and press **Enter**. The quantities for the add-on items are also updated.

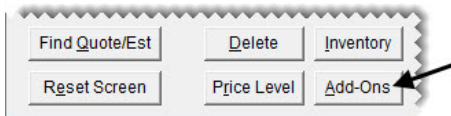
| Q | Auth                                | Incl                                | Qty | Size        | Description |
|---|-------------------------------------|-------------------------------------|-----|-------------|-------------|
| - | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |     | Gold Option |             |
| - | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 4   | 215/65R16   | TOUR FUZION |

7. Change the name of the second quote and the add-on package assigned to it. Then update the quantities.

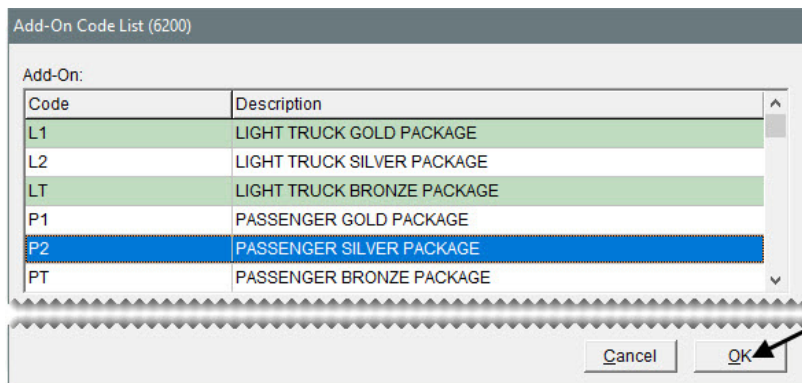
a. Type **Silver Option** in the **Size** field.

| Q | Auth                                | Incl                                | Qty | Size          | Description |
|---|-------------------------------------|-------------------------------------|-----|---------------|-------------|
| - | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |     | Silver Option |             |
| - | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 1   | 215/65R16     | TOUR FUZION |

b. Click **Add-Ons**. The Add-On Code List appears.



c. Select the silver add-on package for passenger tires and click **OK**. The add-on items for the second quote are updated.



d. Change the quantity of the parent item to **4** and press **Enter**. The quantities for the add-on items are also updated.

| Q | Auth                                | Incl                                | Qty | Size          | Description |
|---|-------------------------------------|-------------------------------------|-----|---------------|-------------|
| - | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |     | Silver Option |             |
| - | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 4   | 215/65R16     | TOUR FUZION |

8. Change the name of the last quote and update the quantity.

a. Type **Bronze Option** in the **Size** field.

**Note:** Because the quote item is already assigned the bronze add-on package by default, you don't need to look up a different set of add-ons.

b. Change the quantity of the parent item to **4** and press **Enter**. The quantities for the add-on items are also updated.

| Q | Auth                                | Incl                                | Qty | Size          | Description |
|---|-------------------------------------|-------------------------------------|-----|---------------|-------------|
| - | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |     | Bronze Option |             |
| - | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 4   | 215/65R16     | TOUR FUZION |

9. Save and print the quote.
  - a. Clear the **Auth** (authorize) check box for each quote.

| Q | Auth                                | Incl                                | Qty | Size      | Description               | Parts  | Labor | F |
|---|-------------------------------------|-------------------------------------|-----|-----------|---------------------------|--------|-------|---|
|   | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |     |           | Gold Option               |        |       |   |
| - | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 4   | 215/65R16 | TOUR FUZION               | 127.89 | 0.00  |   |
|   | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 1   |           | COMPUTER 4-WHEEL ALIGNMEN | 0.00   | 85.00 |   |
|   | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |     |           | Silver Option             |        |       |   |
| - | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 4   | 215/65R16 | TOUR FUZION               | 127.89 | 0.00  |   |
|   | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 1   |           | COMPUTER 4-WHEEL ALIGNMEN | 0.00   | 85.00 |   |
|   | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |     |           | Bronze Option             |        |       |   |
| - | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 4   | 215/65R16 | TOUR FUZION               | 127.89 | 0.00  |   |
|   | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 4   |           | TIRE DISPOSAL - PASS      | 3.00   | 0.00  |   |

- b. Click **Save**.
- c. Click **Print**. The Report Window opens and displays a copy of the quote.



- d. Print the quote and close the Report Window.

10. Close the Quote and Estimate Writer screen.

## Turning Quotes into Work Orders

When a customer is ready to purchase the items you've put on a quote, you can turn the quote into a work order.

### Walk-Through: Turning a Quote into a Work Order

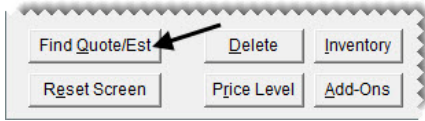
Bob Adams has decided to buy the Uniroyal tires you put on a quote for him. Retrieve the quote and turn it into a work order.

#### To turn a quote into a work order

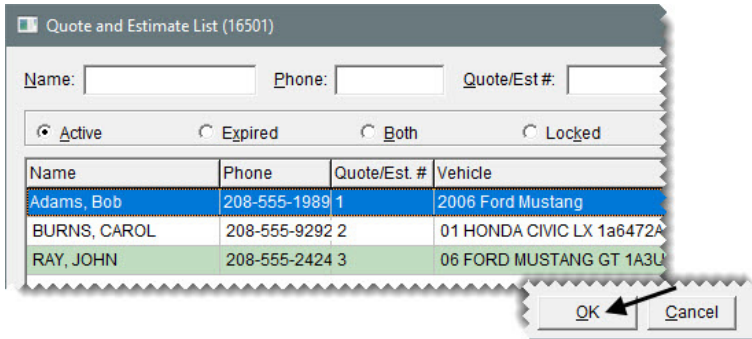
1. Retrieve the quote for Bob Adams.
  - a. Press **F12** to open the Quote and Estimate Writer.



- b. Click **Find Quote/Est.** The Quote and Estimate List appears.

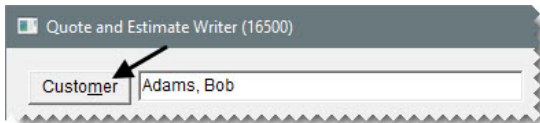


- c. Select the quote for Bob Adams and click **OK**.

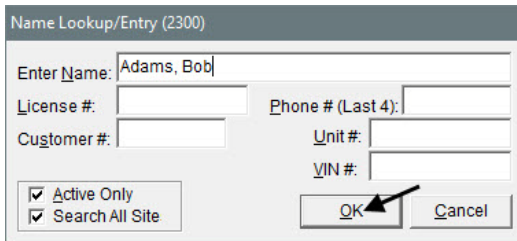


- 2. To activate the button for turning a quote into a work order, create a customer record for Bob Adams.

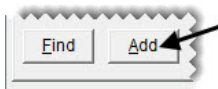
- a. Click **Customer**. TireMaster prompts you for the customer's name.



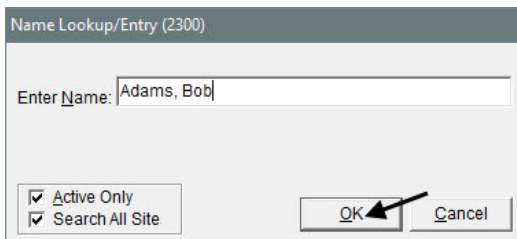
- b. Type **Adams, Bob** and click **OK**. The message, "No matches found" appears.



- c. Click **OK** to close the message. The Customer Maintenance screen appears.
- d. Click **Add**. The Name/Lookup screen opens with the customer's name filled in.



- e. Click **OK**.



3. Add Bob's address to the customer record.
  - a. Type **1001 8th St.** in the **Address** field.
  - b. Type **83701** in the **Zip** field. The Zip Codes screen appears.
  - c. Click **OK**. The city and state fill in for you.

Customer Maintenance (12200)

General Vehicle ShipTo Ledger/History Aging Infor

Name: Adams, Bob

Address: 1001 8th St.

Address2:

City: BOISE

State: ID Zip: 83701 Color

4. Add Bob's cell phone and enable texting.
  - a. Click **Phone & E-mail**. The Contact List opens.

Information Prev Next

Cust#: 1 215

| Contact Type   | Number / E-Mail | Name |
|----------------|-----------------|------|
| Business Phone |                 |      |
| Business Phone |                 |      |

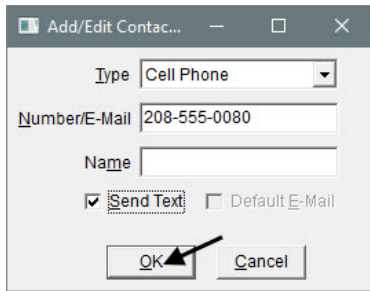
Phone & E-Mail Text Edit Contact

- b. Click **Add**. The Add/Edit Contact screen opens.

Add Edit Delete

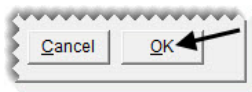
- c. Do the following:
    - ◆ Select Cell Phone from the **Type** drop-down.
    - ◆ For the number, type **208-555-0080**.
    - ◆ Select the **Send Text** check box.

- ◆ Click **OK** to save your changes.

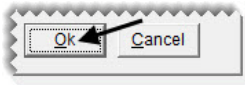


d. Close the Contact List and return to the Customer Maintenance screen.

5. To save the new customer, click **OK**.



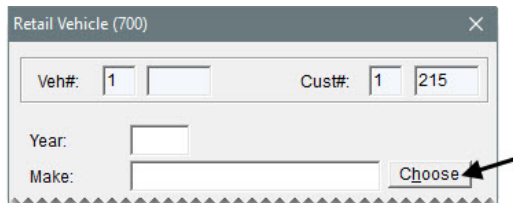
6. Add the customer's vehicle.
  - a. Click **OK** again. The Vehicle List appears.



b. Click **Add**. The Retail Vehicle screen appears.



c. Click **Choose**. The Standard Vehicle Selection screen appears.

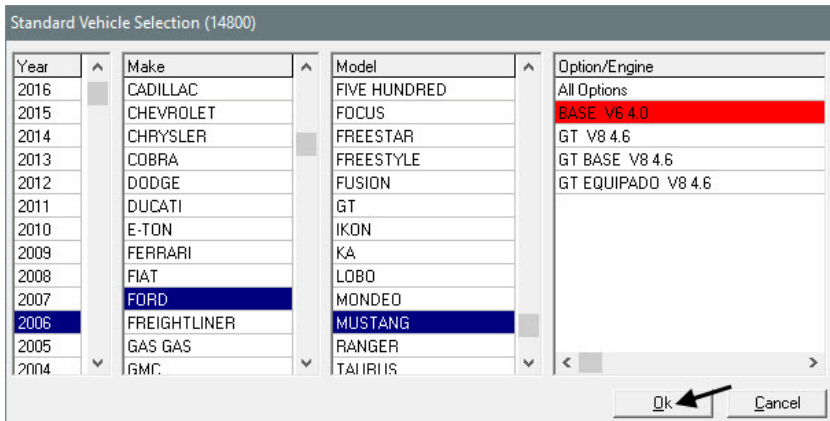


d. Select the following, and click **OK**.

- ◆ Year: 2006
- ◆ Make: Ford
- ◆ Model: Mustang
- ◆ Engine/Option: Base V6 4.0.



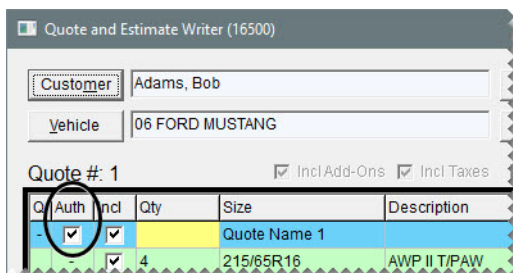
- e. To save the new vehicle, click **OK**. Then click **OK** again to close the Retail Vehicle screen.



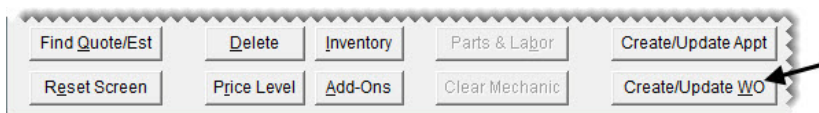
- f. To close the Vehicle List, click **OK**.



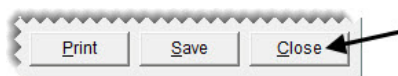
- 7. Make sure the **Auth** (authorization) check box is selected for the quote.



- 8. Click **Create/Update WO**. A confirmation message appears.



- 9. Click **OK** to close the message. The green coloring in the **Q** and **Auth** columns identifies the items that were put on the work order.
- 10. Close the Quote and Estimate Writer screen.



### Walk-Through: Turning a Comparison Quote into a Work Order

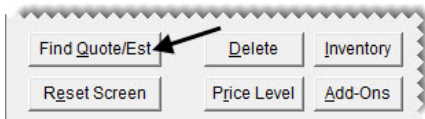
Carol Burns returns with her good, better, best quote. She's decided to buy the Goodyear Assurance tire with the 65,000 mile tread life.

## To turn a comparison quote into a work order

1. Retrieve the quote for Carol Burns.
  - a. Press **F12** to open the Quote and Estimate Writer.



- b. Click **Find Quote/Est.** The Quote and Estimate List appears.

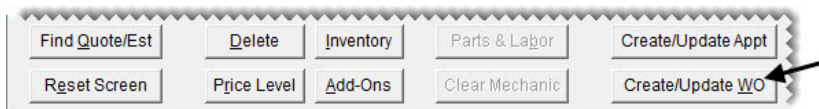


- c. Select the quote for Carol Burns and click **OK**.
  2. To enlarge the quote (top) panel, click .
  3. Select the **Auth** check box in the blue row for the Assurance tire.

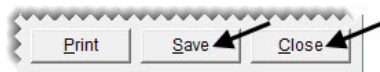
|                                     |                                     |      |                           |
|-------------------------------------|-------------------------------------|------|---------------------------|
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Best | 65,000 Mile Tread Life    |
| -                                   | <input checked="" type="checkbox"/> | 4    | 185/70R14/SL ASSURANCE AS |
|                                     | <input checked="" type="checkbox"/> | 4    | TIRE DISPOSAL - PASS      |

**Tip:** To simplify the screen display, click the minus sign (-) in the **Q** column for the first row of the quote to hide the quoted item and its add-ons. When you need to see the items again, click the plus sign (+).

4. Click **Create/Update WO**. A confirmation message appears.



5. Click **OK** to close the confirmation message. The green coloring in the **Q** and **Auth** columns identifies the items that were put on the work order.
6. Save your changes and close the Quote and Estimate Writer.



# Selling Maintenance and Repairs

In addition to providing customers with tire quotes, you can create vehicle inspection reports and write estimates for vehicle maintenance and repairs. This chapter includes the following topics:

- ◆ “Service Checklist Settings” on page 53
- ◆ “Recording Results of Vehicle Inspections” on page 54
- ◆ “Writing Estimates” on page 57
- ◆ “Turning an Estimate into a Work Order” on page 60
- ◆ “Recording Core Charges” on page 62
- ◆ “Scheduling Services” on page 63

## Service Checklist Settings

You can set up one or more service checklists in TireMaster. Service checklists are set up on the Service Checklist Maintenance screen. They can include one or more inspection areas (Figure 13).

| Inspection area       | Mileage | Postcard |
|-----------------------|---------|----------|
| Battery Inspection    |         |          |
| Brake Inspection      |         |          |
| Fluid Inspection      |         |          |
| General Inspection    |         |          |
| Tire Inspection       |         |          |
| Under Hood Inspection |         |          |

**Figure 13:** Service Checklist Maintenance Screen

For each inspection area, you can indicate whether services should be recommended automatically based on vehicle mileage, associate them with postcards for declined service mailings, and create a list of items

that are commonly added to estimates and work orders when services are recommended (Figure 14). Adding items to inspection areas helps you save time at point of sale.

Area Name: Brake Inspection

Mileage: 0 Mileage-Based Service

Postcard: [Yellow Box with ...]

Description: Check linings, lines, hoses, and parking brake.

Inventory:

| Size | Description                | Parts | Labor |
|------|----------------------------|-------|-------|
| .    | STANDARD BRAKE JOB - FRONT | 0.00  | 0.00  |
| .    | STANDARD BRAKE JOB - BACK  | 0.00  | 0.00  |
| .    | NON-STOCK BRAKE PADS       | 0.00  | 0.00  |
| .    | NON-STOCK BRAKE ROTOR      | 0.00  | 0.00  |

Add Inventory Delete Inventory OK Cancel

Figure 14: The Settings for an Inspection Area

## Recording Results of Vehicle Inspections

You can record the results of vehicle inspections with the Quote and Estimate Writer. The recorded information can then be used to write estimates for recommended services. When you record the results of vehicle inspections, you can set the status of the inspection areas to the following:

- ◆ **OK** The inspection area is okay.
- ◆ **SUG** The inspection area will need maintenance or repairs during this or a future visit.
- ◆ **REC** The inspection area needs repairs immediately.
- ◆ No status indicates that the inspection area was not checked.

### Walk-Through: Recording the Results of Vehicle Inspections

When Lori Jones dropped off her Nissan Sentra, Russell Smith identified the cause of the leaking fluid and temperature warning. He also noticed that the tires should be aligned. Record the results of the inspection.

## To record the results of a vehicle inspection

1. Retrieve the work order for Lori Jones.
2. On the Invoice Entry screen, click **Chk**. The Quote and Estimate Writer opens.

Invoice Entry (3300)

Invoice: 116    1/ 3/2018    Sales DJ

Sold To: Jones, Lori    Contact    Tax Level

Ship To:    208-555-1001    Lori Cell

Vehicle: 14 SENTRA S/SV/SR/SL NISSAN AILEY (0)    SVC    **Chk**    Fitment

3. Click **Contact** and select the cell phone number from the list that appears.



Quote and Estimate Writer (16500)

Customer: Jones, Lori    **Contact**


**Note:** You can define whether a phone number is required to save quotes and estimates by setting a system control.

4. Make sure the basic inspection checklist is selected. If it isn't, click **Checklist** and select it from the list that appears.

Checklist    **Basic Inspection**    Add Quote Line    Duplicate Quote Line

5. To enlarge the service checklist (bottom) panel, click  twice.
6. Identify the areas that passed the inspection and the technician who performed the inspection.
  - a. For the Battery inspection area, click the **Status/Qty** field and press . The status is set to OK.

| Q | Auth                     | Incl                     | Status/Qty | Inspection Area/Size |
|---|--------------------------|--------------------------|------------|----------------------|
| + | <input type="checkbox"/> | <input type="checkbox"/> |            | Battery Inspection   |


- b. Click the **Tech/Tax** field for the Battery inspection area and press . Then select Russell Smith from the list that appears and click **OK**.

| Q | Auth                     | Incl                     | Status/Qty | Inspection Area/Size | FET/Miles | Sales/Sub | Tech/Tax |
|---|--------------------------|--------------------------|------------|----------------------|-----------|-----------|----------|
| + | <input type="checkbox"/> | <input type="checkbox"/> | OK         | Battery Inspection   |           | Admin     | RS       |
|   |                          |                          |            |                      | 0.00      |           | 0.00     |


- c. Repeat steps 6a and 6b for the Brake, Fluid, and General inspection areas.

| Q | Auth                     | Incl                     | Status/Qty | Inspection Area/Size | Sales/Sub | Tech/Tax | Date/Total | Notes/Product Code |
|---|--------------------------|--------------------------|------------|----------------------|-----------|----------|------------|--------------------|
| + | <input type="checkbox"/> | <input type="checkbox"/> | OK         | Battery Inspection   | Admin     | RS       | 1/4/2018   |                    |
|   |                          |                          |            |                      | 0.00      | 0.00     | 0.00       |                    |
| + | <input type="checkbox"/> | <input type="checkbox"/> | OK         | Brake Inspection     | Admin     | RS       | 1/4/2018   |                    |
|   |                          |                          |            |                      | 0.00      | 0.00     | 0.00       |                    |
| + | <input type="checkbox"/> | <input type="checkbox"/> | OK         | Fluid Inspection     | Admin     | RS       | 1/4/2018   |                    |
|   |                          |                          |            |                      | 0.00      | 0.00     | 0.00       |                    |
| + | <input type="checkbox"/> | <input type="checkbox"/> | OK         | General Inspection   | Admin     | RS       | 1/4/2018   |                    |
|   |                          |                          |            |                      | 0.00      | 0.00     | 0.00       |                    |


7. Suggest an alignment for the vehicle.

- a. Click the **Status/Qty** field for the Tire inspection area and press  twice. The status is set to Sug (for suggested).

|   |                          |                          |  |                       |  |
|---|--------------------------|--------------------------|--|-----------------------|--|
| + | <input type="checkbox"/> | <input type="checkbox"/> |  | Tire Inspection       | Check tread, wear pattern, and pres      |
| + | <input type="checkbox"/> | <input type="checkbox"/> |  | Under Hood Inspection | Check air filter, drive belts, cooling : |


- b. Click the **Tech/Tax** field for the Tire inspection area and press . Then select Russell Smith from the list that appears and click **OK**.


| Q | Auth                     | Incl                     | Status/Qty | Inspection Area/Size | Sales/Sub | Tech/Tax | Date/Total | Notes/Product Code |
|---|--------------------------|--------------------------|------------|----------------------|-----------|----------|------------|--------------------|
| + | <input type="checkbox"/> | <input type="checkbox"/> | OK         | Battery Inspection   | Admin     | RS       | 1/4/2018   |                    |
| + | <input type="checkbox"/> | <input type="checkbox"/> | SUG        | Tire Inspection      | Admin     | RS       | 1/4/2018   |                    |
|   |                          |                          |            |                      | 0.00      | 0.00     | 0.00       |                    |


- c. Click the **Notes/Product Code** field for the Tire inspection area and press  to open the Notes screen. Then type **Noticed some uneven tire wear. should have alignment soon,** and click **OK**.

| Sales/Sub | Tech/Tax | Date/Total | Notes/Product Code |
|-----------|----------|------------|--------------------|
| Admin     | RS       | 1/4/2018   |                    |
| Admin     | RS       | 1/4/2018   |                    |
| 0.00      | 0.00     | 0.00       |                    |

8. Recommend replacing the vehicle's water pump.

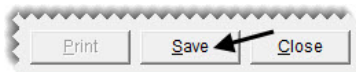
- a. Click the **Status /Qty** field for the Under Hood inspection areas and press  three times. The status is set to Rec (for recommended).

- b. Click the **Tech/Tax** field for the Under Hood inspection areas and press . Then select Russell Smith from the list that appears and click **OK**.

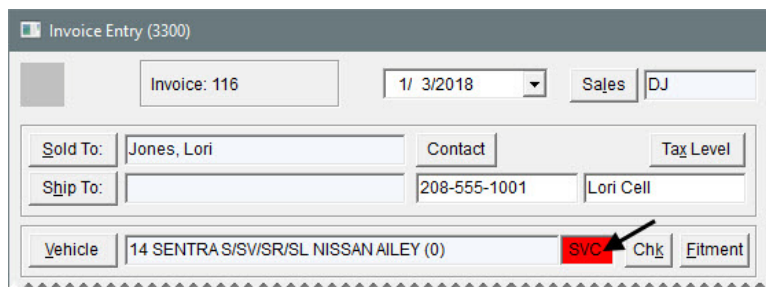
- c. Click the **Notes/Product Code** field for the Under Hood inspection area and press  to open the Notes screen. Then type **Water pump is leaking. Recommend replacement**, and click **OK**.

| Q | Auth                     | Incl                     | Status/Qty | Inspection Area/Size  | Sales/Sub | Tech/Tax | Date/Total | Notes/Product Code    |
|---|--------------------------|--------------------------|------------|-----------------------|-----------|----------|------------|-----------------------|
| + | <input type="checkbox"/> | <input type="checkbox"/> | OK         | Battery Inspection    | Admin     | RS       | 1/4/2018   |                       |
|   |                          |                          |            |                       | 0.00      | 0.00     | 0.00       |                       |
| + | <input type="checkbox"/> | <input type="checkbox"/> | OK         | Brake Inspection      | Admin     | RS       | 1/4/2018   |                       |
|   |                          |                          |            |                       | 0.00      | 0.00     | 0.00       |                       |
| + | <input type="checkbox"/> | <input type="checkbox"/> | OK         | Fluid Inspection      | Admin     | RS       | 1/4/2018   |                       |
|   |                          |                          |            |                       | 0.00      | 0.00     | 0.00       |                       |
| + | <input type="checkbox"/> | <input type="checkbox"/> | OK         | General Inspection    | Admin     | RS       | 1/4/2018   |                       |
|   |                          |                          |            |                       | 0.00      | 0.00     | 0.00       |                       |
| + | <input type="checkbox"/> | <input type="checkbox"/> | SUG        | Tire Inspection       | Admin     | RS       | 1/4/2018   | Noticed some uneven t |
|   |                          |                          |            |                       | 0.00      | 0.00     | 0.00       |                       |
| + | <input type="checkbox"/> | <input type="checkbox"/> | REC        | Under Hood Inspection | Admin     | RS       | 1/4/2018   | Water pump is leaking |
|   |                          |                          |            |                       | 0.00      | 0.00     | 0.00       |                       |

9. Click **Save**.



10. Close the Quote and Estimate Writer screen. The recommended-service indicator on the Invoice Entry screen is colored red, indicating that vehicle repairs are needed immediately.



Invoice Entry (3300)

Invoice: 116      1/ 3/2018      Sales      DJ

Sold To: Jones, Lori      Contact      Tax Level

Ship To:      208-555-1001      Lori Cell

Vehicle: 14 SENTRA S/SV/SR/SL NISSAN AILEY (0)      **SVC**      Chk      Fitment

**Note:** The recommended-service indicator is also on the vehicle in the Customer Maintenance screen.

11. To exit the work order, click **Quit**.

## Writing Estimates

If a customer wants to know how much recommended services are going to cost, you can create an estimate with the Quote and Estimate Writer.

## Walk-Through: Writing an Estimate

Lori Jones wants to know how much the recommended water pump replacement and suggested alignment will cost. Write an estimate for these two jobs.


### To write an estimate

1. Retrieve the vehicle inspection results for Lori Jones.
  - a. Press **F12** to open the Quote and Estimate Writer.



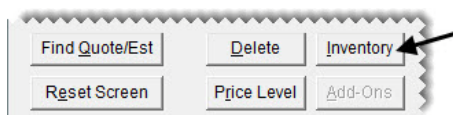
- b. Click **Find Quote/Est.**



- c. Select the row for Lori Jones and click **OK**.
2. To enlarge the service checklist (bottom) panel, click  twice.
3. Add the alignment to the estimate.
  - a. To include the name of the inspection area and a description of the problem on the estimate, select the **Incl** (include) check box for the Tire Inspection row.
  - b. To include the alignment in the estimate total (at the bottom of the printout), select the **Auth** check box.
  - c. To see if there is a list of items that can be used to service the tire inspection area, click the plus sign (+) in the **Q** column for the tire inspection row. (No items are listed.)

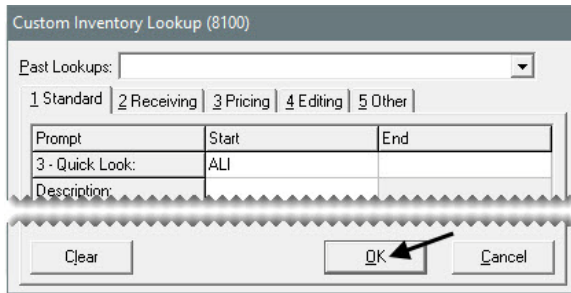
| Q | Auth                                | Incl                                | Status/Qty | Inspection Area/Size  | D |
|---|-------------------------------------|-------------------------------------|------------|-----------------------|---|
| + | <input type="checkbox"/>            | <input type="checkbox"/>            | OK         | Battery Inspection    | G |
| + | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | SUG        | Tire Inspection       | G |
| + | <input type="checkbox"/>            | <input type="checkbox"/>            | REC        | Under Hood Inspection | G |

- d. To add the alignment to the estimate, click **Inventory**. The Custom Inventory Lookup screen appears.

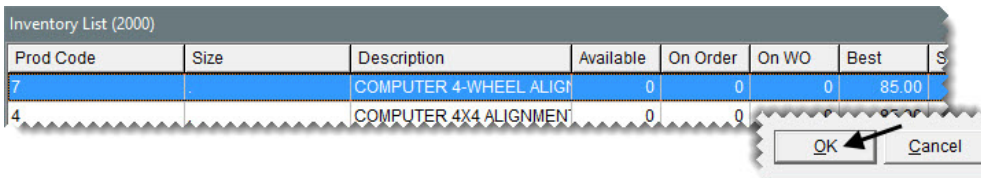




- e. Type the quick look code **Ali** and click **OK**. The Inventory List appears.

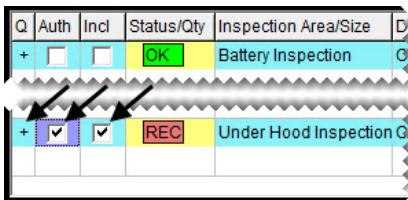


- f. Select the 4 wheel alignment and click **OK**.

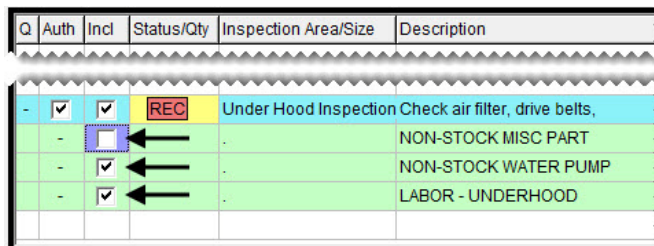


- 4. Add the water pump replacement to the estimate.

- a. To include the name of the inspection area and a description of the problem on the estimate, select the **Incl** (include) check box for the Under Hood Inspection row.
- b. To include replacing the water pump in the estimate total (at the bottom of the printout), select the **Auth** check box.
- c. To see a list of items that can be used to service the inspection area, click the plus sign (+) in the **Q** column for the Under Hood Inspection row.



- d. To define which items to include on the estimate, make sure the check boxes in the **Incl** column are selected for the labor item and the nonstock water pump. Then clear the check box for the miscellaneous non-stock part.



- e. Change the description of the non-stock water pump to **Murray Water Pump**, and change the price to **\$53.99**.

- f. For the labor item, change the quantity to **1.1** (the number of hours to do the job) and change the description to **Remove and replace water pump**.

| Q | Auth                                | Incl                                | Status/Qty | Inspection Area/Size | Description  | Parts | Labor | FE |
|---|-------------------------------------|-------------------------------------|------------|----------------------|--|-------|-------|----|
| - | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | REC        |                      | Under Hood Inspection Check air filter, drive belts, |       |       |    |
| - | <input type="checkbox"/>            | <input type="checkbox"/>            | 1          | .                    | NON-STOCK MISC PART                                  | 0.00  | 0.00  |    |
| - | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 1          | .                    | Murray Water Pump                                    | 53.99 | 0.00  |    |
| - | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 1.1        | .                    | Remove and replace water pump                        | 0.00  | 80.00 |    |

- 5. Save and print the estimate.
  - a. Click **Save**.
  - b. Click **Print**. The Report Window opens and displays a copy of the estimate.



- c. Print the estimate and close the report Window.
- 6. Close the Quote & Estimate Writer.

## Turning an Estimate into a Work Order

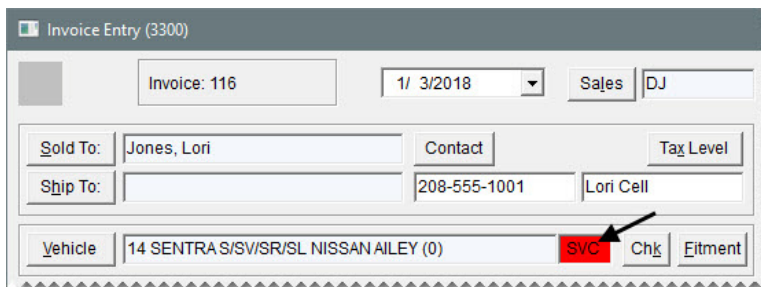
You can select the items needed for recommended maintenance or repairs in the Quote and Estimate Writer and add them to an existing work order or a new work order.

### Walk-Through: Turning an Estimate into a Work Order

Lori Jones decides to have the water pump replaced on her vehicle today, and she declines the alignment. Add the water pump replacement to her work order. Then update the cost of the item.

#### To turn an estimate into a work order

- 1. Retrieve Lori Jones’s work order, and click **Chk** on the Invoice Entry screen. The Quote and Estimate Writer opens.

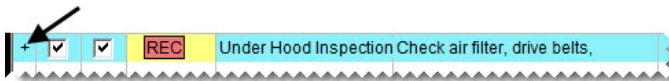


- 2. To enlarge the service checklist (bottom) panel, click twice.

3. Define which items will be added to the customer's work order.
  - a. Clear the **Auth** (authorize) check box for the Tire inspection area, because the alignment has been declined.

| Q | Auth                                | Incl                                | Status/Qty | Inspection Area/Size  | Des |
|---|-------------------------------------|-------------------------------------|------------|-----------------------|-----|
| + | <input type="checkbox"/>            | <input type="checkbox"/>            | OK         | Battery Inspection    | Ch  |
| - | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | SUG        | Tire Inspection       | Ch  |
| - | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 1          |                       | CO  |
| - | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | REC        | Under Hood Inspection | Ch  |
| - | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | 1          |                       | NO  |

- b. If you cannot see the water pump parts and labor, click the plus sign (+) in the **Q** column for the under hood inspection row.



- c. Make sure the **Incl** check boxes are selected for both the parts and labor.

| Q | Auth                                | Incl                                | Status/Qty | Inspection Area/Size  | Description                    | Parts | Labor | F |
|---|-------------------------------------|-------------------------------------|------------|-----------------------|--------------------------------|-------|-------|---|
| - | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | REC        | Under Hood Inspection | Check air filter, drive belts, |       |       |   |
| - | <input type="checkbox"/>            | <input type="checkbox"/>            | 1          |                       | NON-STOCK MISC PART            | 0.00  | 0.00  |   |
| - | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |            |                       | Murray Water Pump              | 53.99 | 0.00  |   |
| - | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 1.1        |                       | Remove and replace water pump  | 0.00  | 80.00 |   |

4. Click **Create/Update WO**. A confirmation message appears.



5. Close the confirmation message. The green coloring in the **Q** and **Auth** columns identifies the items that have been added to the work order.
6. Save your changes and close the Quote and Estimate Writer. The Invoice Entry screen appears.



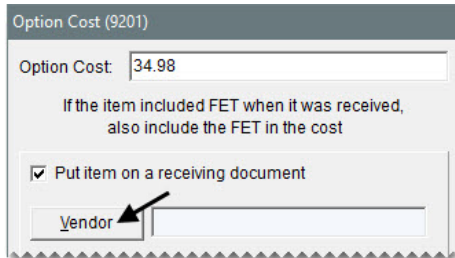
7. Record your cost for the water pump.
  - a. Select the row for the water pump, and click **Option Cost**. The Option Cost screen appears.

| Quantity | Size | Description                 | Parts | Labor | FET  | Tax  |
|----------|------|-----------------------------|-------|-------|------|------|
| 1.00     |      | Murray Water Pump           | 53.99 | 0.00  | 0.00 | part |
| 1.10     |      | Remove and replace water pi | 0.00  | 80.00 | 0.00 | part |

|  |                                    |  |                                       |                                       |  |                                      |
|--|------------------------------------|--|---------------------------------------|---------------------------------------|--|--------------------------------------|
| <input type="radio"/> No Status          | <input type="button" value="Add"/> | <input type="button" value="Price Level"/> | <input type="button" value="Delete"/> | <input type="button" value="Adjust"/> | <input type="button" value="Option Cost"/> | <input type="button" value="Close"/> |
| <input checked="" type="radio"/> On Site |                                    |  |                                       |                                       |  |                                      |

- b. Type **34.98** in the **Option Cost** field.
- 8. Add the water pump to a receiving document (an order from a vendor).
  - a. Make sure the **Put item on a receiving document** check box is selected.
  - b. Click **Vendor**. The Name Lookup/Entry screen appears.



- c. Type **O'Reilly** and click **OK**.
- d. Click **OK** to save your changes and close the Option Cost screen. The row for the water pump is now green, because the cost has been recorded.



- 9. Leave the work order open.

## Recording Core Charges

When you sell replacement parts, you can record the core charges that the vendors assessed when you bought the items. Recording core charges in TireMaster helps you keep track of the cores you have on hand for each vendor, along with the credits those vendors owe you.

### Walk-Through: Recording Core Charges

Before you close the work order for Lori Jones, record the \$9.00 core charge passed on to you by the vendor.

**Note:** The core charge was included in the item's \$34.98 cost that you entered in the previous exercise.

#### To record core charges

- 1. If the work order for Lori Jones isn't already open, open it.
- 2. Type **9.00** in the **Core Return** field for the water pump and press **Enter**. The Add Cores screen opens.

| Size | Description                 | Parts | La | Flat Rate | Core Return | F |
|------|-----------------------------|-------|----|-----------|-------------|---|
|      | Murray Water Pump           | 53.99 |    | 0.00      | 9.00        | 2 |
|      | Remove and replace water pi | 0.00  |    | 0.00      | 0.00        | 2 |

**Tip:** If you can't see the field, scroll to the right.

3. Look up the vendor who sold you the item.
  - a. Click **Vendor**. The Name Lookup/Entry screen appears.

- b. Type **O'Reilly** and click **OK**.
4. Click **OK** to save your changes and close the Add Cores screen.

5. Close the Invoice Entry screen and the Open Work Order List.

## Scheduling Services

If customers need to return their vehicles for a suggested or recommended service, you can access the Scheduler from the Quote and Estimate Writer and set an appointment.

### Walk-Through: Scheduling Services

Lori Jones will be able to return for the suggested alignment later this week. Schedule the appointment for Friday morning.

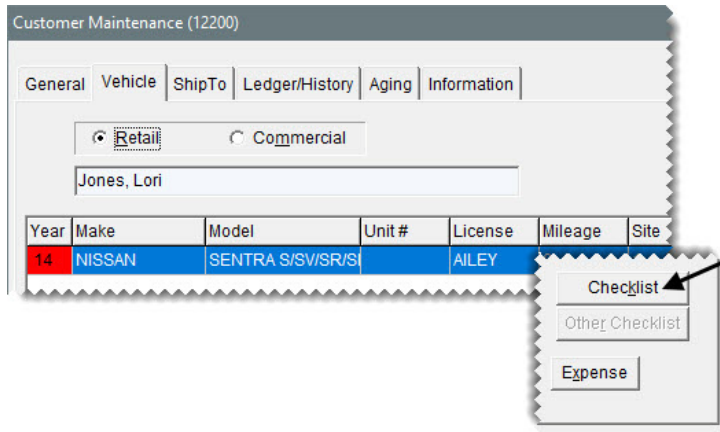
#### To schedule services

1. Retrieve the vehicle inspection results for Lori Jones from the Customer Maintenance screen.

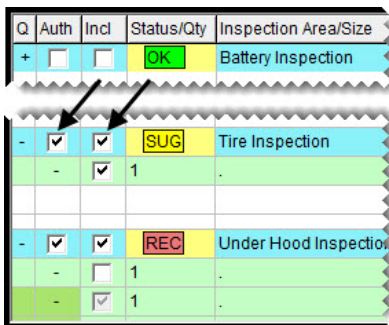
- a. Click **Customers**.

- b. Look up Lori Jones. The Customer Maintenance screen appears.
  - c. Click the **Vehicle** tab.

- d. Make sure the Nissan Sentra is selected and click **Checklist**. The Quote and Estimate Writer opens.



- To enlarge the service checklist (bottom) panel, click twice.
- If you cannot see the alignment item, click the plus sign (+) in the **Q** column for the Tire Inspection row.
- Select the **Auth** check box for the Tire Inspection area.
- Make sure the **Incl** check box is selected for the alignment item.



- Click **Create/Update Appt**. A confirmation message appears.



- Close the confirmation message. The Appointment List appears.

8. Set the date and time for the appointment that has been created.
  - a. Make sure the row for Lori Jones is selected and click **Edit**. The Appointment Maintenance screen appears.

| Schedule       | S | Promised | Bay/Job | Mechanic | Customer      |
|----------------|---|----------|---------|----------|---------------|
| 01/05 08:00 AM |   |          |         |          | ZIMER, BRANDY |
| 01/05 04:30 PM |   |          |         |          | Jones, Lori   |

- b. Enter this Friday's date in the **Begin Date** and **End Date** field.
  - c. Set the beginning time to 8:00 AM and the ending time to 10:00.

- d. Save the appointment and close the Appointment Maintenance screen.

9. Close the Appointment List and the other open screens.





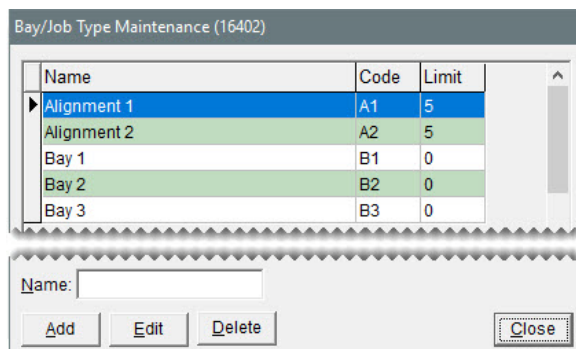
# Working with the Scheduler

With the Appointment Scheduler in TireMaster, you can collect information about upcoming jobs and allocate resources needed to complete the work. This chapter includes the following topics:

- ◆ “Scheduler Settings” on page 67
- ◆ “Scheduling an Appointment” on page 68
- ◆ “Printing a List of Appointments” on page 71
- ◆ “Turning an Appointment into a Work Order” on page 72

## Scheduler Settings

With the TireMaster Scheduler, appointments can be scheduled based on the availability of workspace or the kind of work performed. Before you begin using the Scheduler, create a list of the bays in your shop or the types of jobs performed. The example in Figure 15 shows a list of bays.



*Figure 15: A List of Bays for the Appointment Scheduler*

In addition to bays or job types, appointments are also scheduled based on the availability of service technicians. When you set up user accounts for employees, you need to indicate whether they're mechanics. When the **Mechanics** check box is selected on the setup screen for an employee's user account (Figure 16), that individual's name will be available in the Scheduler.

Employee/User Edit (8000)

Emp #: 1 10 P.O.S.

Name: Smith, Russell

ID: RS

SQL User: RS

E-Mail:

Payroll:

Active       Mechanic  ←

Local User

Password:       Both must match  
 Confirm:       to change this  
    user's password.

Commissions            

**Figure 16:** Mechanics Check Box on the User Account Setup Screen

## Scheduling an Appointment

Scheduling an appointment in TireMaster includes stating the purpose for the upcoming visit, setting a date and time, and allocating a bay or defining the job type. You can also assign the job to a technician and set aside items needed to complete the needed maintenance or repairs.

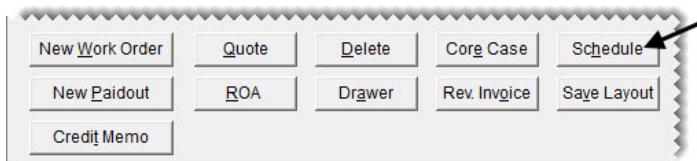
### Walk-Through: Scheduling an Appointment

Tom Jacob thinks his pickup truck needs shocks and struts. He wants to schedule an appointment for next Friday morning and asks if you can give him a ride to work. Technician Kris Johnson will do the work in Bay 2.

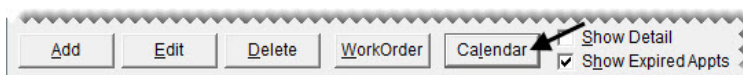
#### To schedule an appointment

1. Click **Invoicing**. The Open Work Order List appears.

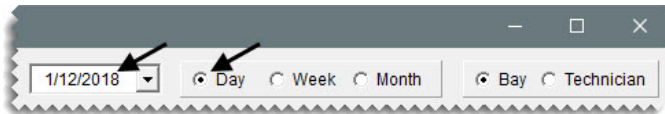
2. Click **Schedule**. The Appointment List appears.




3. Click **Calendar**. The Appointment Calendar opens.

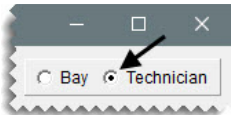


4. With the calendar in **Day** view, select the date for next Friday from the pop-up calendar.

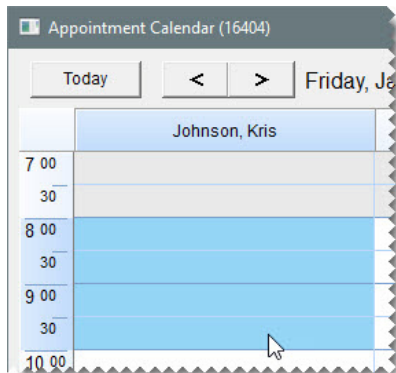


**Tip:** You can enlarge the Appointment Calendar by resizing it or clicking the maximize button (  ) in the upper-right corner of the screen.

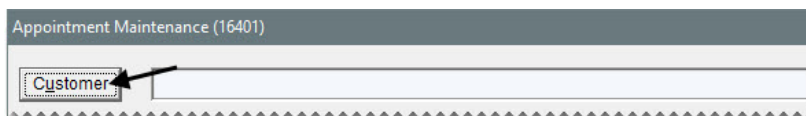
5. Schedule a technician.
  - a. Select **Technician** view.



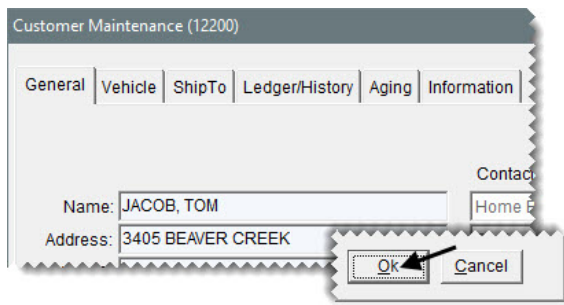
- b. In the column for Kris Johnson, click the row for 8:00 AM, and drag to the row for 10:00 AM. The Appointment Maintenance screen appears.



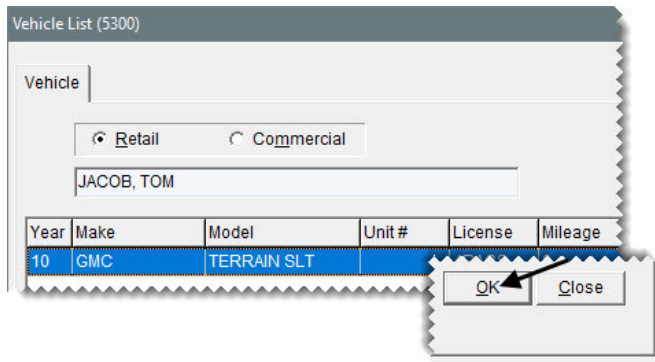
6. Look up the customer and vehicle.
  - a. Click **Customer**, and look up Tom Jacob.



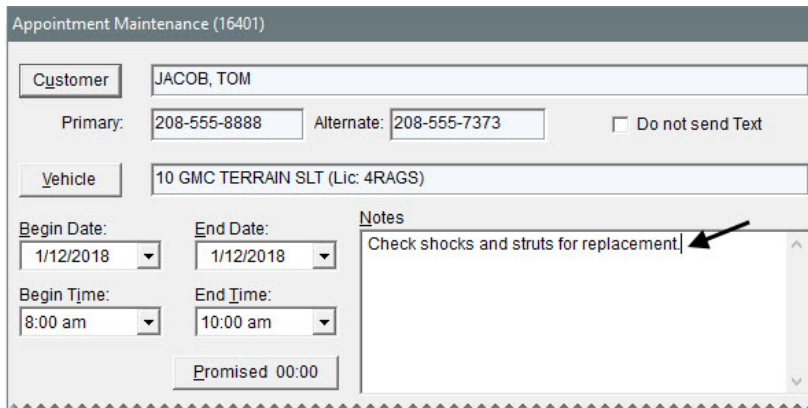
- b. Click **OK** to close the Customer Maintenance screen. TireMaster prompts you to select a vehicle.



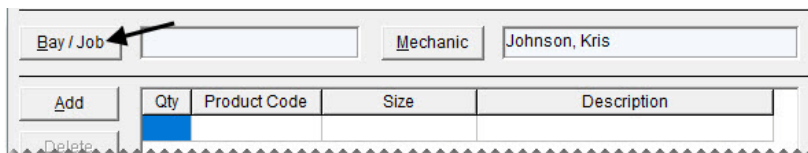
- c. Select the customer's vehicle and click **OK**. The customer's name and vehicle are added to the Appointment Maintenance screen.



7. Type the note **check shocks and struts for replacement**.



8. Click **Bay/Job**, and select Bay 2 from the list that appears.



9. Click **OK**.
10. Click **Save**.



11. Close the Appointment Maintenance screen and the Appointment Calendar. The new appointment will appear on the Appointment List after you exit and open the scheduler again.

## Exercises

- A. A new customer, named Dennis Jackson, calls to schedule an appointment for next Monday afternoon. His 2004 Nissan Titan needs an alignment. Russell Smith will do the work in alignment bay 2.

## Exercises

B. Assign Russell Smith and Bay 3 to the appointment for Lori Jones.

C. Delete the appointment for Brandy Zimer.

**Note:** If Brandy Zimer's appointment isn't listed, make sure the **Show Expired Apts** check box is selected at the bottom of the screen.

# Printing a List of Appointments

You can print a list of appointments to post in the shop. This list can include all appointments or you can limit it to only those for a particular technician or bay or job type.

## Walk-Through: Printing an Appointment List

Print a list of all of appointments assigned to Kris Johnson during the current month.

### To print an Appointment Report

1. If the Appointment List isn't already open, click **Schedule** on the Open Work Order List.



2. Click **Report**. The Appointment Report screen appears.



3. Leave today's date entered in the **Begin Date** field. For the ending date, select the last day of the month from the pop-up calendar.

4. To include all bays, make sure All is selected from the **BayJob** drop-down list.

5. To limit the report to Kris Johnson's appointments, select his name from the **Mechanic** drop-down list.

- Click **Print**. The Report Window opens and displays the Appointment Report.

Appointment Report (16406)

Begin Date: 1/4/2018    End Date: 1/31/2018

BayJob: All

Mechanic: Johnson, Kris

Print    Close

- Print the report and close the Report Window.

## Turning an Appointment into a Work Order

You can use appointment information to automatically create a work order before a customer's scheduled visit or when the customer arrives.

### Walk-Through: Turning an Appointment into a Work Order

Tom Jacob arrives for his appointment. To save time at point of sale, turn the appointment into a work order.

#### To turn an appointment into a work order

- If the Appointment List isn't already open, click **Schedule** on the Open Work Order List.

- Select Tom Jacobs's appointment, and click **Work Order**. The new work order opens.

Appointment List (16400)

Find:

| Schedule       | S | Promised | Bay/Job | Mechanic       | Customer        |
|----------------|---|----------|---------|----------------|-----------------|
| 01/05 08:00 AM |   |          | B3      | Smith, Russell | Jones, Lori     |
| 01/08 01:30 PM |   |          | A2      | Smith, Russell | Jackson, Dennis |
| 01/12 08:00 AM |   |          | B2      | Johnson, Kris  | JACOB, TOM      |

Show Detail  
 Show Expired Appts

3. To exit the work order, click **Quit**.

**Note:** Because the appointment can no longer be edited, it is displayed in gray on the Appointment List.





# Managing Contact Information

Phone numbers and e-mail addresses are classified with a setting called contact types. In other words, a contact type is a means of describing a contact method. Examples of contact types include cell phone and e-mail. Contact types are used for both customers and vendors. This chapter includes the following topics:

- ◆ “Adding and Updating Contact Types” on page 75
- ◆ “Adding Contact Information to Customer and Vendor Records” on page 77

## Adding and Updating Contact Types

New TireMaster systems include five default contact types: business phone, cell phone, e-mail, fax number, and home phone. For some dealers these contact types adequately describe the contact methods for their customers and vendors. However, others want to assign more detailed descriptions to their clients’ contact information. For example, you could create contact types to differentiate between personal and business e-mail addresses or cell phone numbers. In this scenario, additional contact types can be created.

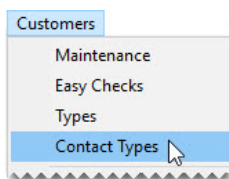
**Note:** When you created the customer record for Lori Jones, you assigned the cell phone contact type.

### Walk-Through: Adding and Updating Contact Types

Some of your customers provide both their work and personal e-mail addresses. To distinguish between these two contact methods, add a new contact type for business e-mails and update the existing e-mail contact type so it can be assigned to personal e-mail addresses.

#### To add and update contact types

1. From the **Customers** menu, select **Contact Types**. The Contact Types screen appears.



**Note:** Although the setup screens for contact types are accessed from the **Customers** menu, the contact types you add and update are used for both customers and vendors.

2. Add the contact type for business e-mail addresses.
  - a. Click **Add**. The Add/Edit Contact Type screen appears.



- b. Type **Business E-mail** in the **Contact Type** field.
- c. Select **E-mail**.
- d. To save the new contact type, click **OK**.

**Note:** The **Cust Order** and **Vend Order** fields allow you to list contact information in the same order for all customers and all vendors. Therefore, when the customer order or vendor order for a contact type is assigned to position 1, 2, 3, 4, or 5, it's put in the corresponding spot on the applicable maintenance screen. When the order for all contact types is set to 0, contact information can be organized differently for each customer and vendor.

3. Update the E-mail contact type, so it's used for personal e-mail addresses only.
  - a. Select E-mail and click **Edit**. The Add/Edit Contact Type screen appears.

| Contact Type    | Position     |
|-----------------|--------------|
| Business E-mail | 0 : 0        |
| Business Phone  | 0 : 0        |
| Cell Phone      | 0 : 0        |
| <b>E-Mail</b>   | <b>0 : 0</b> |
| Fax Number      | 0 : 0        |
| Home Phone      | 0 : 0        |

- b. Change the entry in the **Contact Type** field to **Personal E-mail**.
- c. To save your changes, click **OK**.

4. Close the Contact Type screen.



## Adding Contact Information to Customer and Vendor Records

Customer and vendor records can include multiple phone numbers and e-mail addresses, which you can classify by assigning contact types. When you add a phone number or an e-mail address for a customer or vendor, you can also associate a name with it.

For example, the customer record for a married couple could include the phone number and name for each spouse. In this scenario, you could also include cell phone numbers for the couple's teenage children who sometimes bring the family cars in for repairs. When you add the contact information to a work order, the phone number or e-mail address *and* the name associated with it are displayed on the Invoice Entry screen.

When you add cell phone numbers to customer and vendor records, you can also define whether those devices are allowed to receive text messages.

### Walk-Through: Adding Contact Information to a Customer Record

Rex and Mary Jones recently purchased a car for their 16-year-old twins to share. Because the teens are responsible for maintaining the car, add their cell phone numbers to the customer record for their parents and enable texting for both of the teens.

#### To add contact information to a customer record

1. Look up the customer record for Rex and Mary Jones.
2. On the Customer Maintenance screen, click **Phone & E-mail**. The Contact List appears.

| Name              | Contact Type | Number / E-Mail | Name      |
|-------------------|--------------|-----------------|-----------|
| JONES, REX & MARY | Cell Phone   | 208-555-7700    | REX CELL  |
|                   | Cell Phone   | 205-555-7701    | MARY CELL |

3. To add daughter Maddie's cell phone, do the following:
  - a. Click **Add**. The Add/Edit Contact screen appears.



- b. Record the following information:
  - ♦ Select Cell Phone from the **Type** drop-down.
  - ♦ Type **208-555-7702** in the **Number/E-mail** field.
  - ♦ Type **Maddie** in the **Name** field.
- c. Select the **Send Text** check box.
- d. To save the new phone number, click **OK**.

4. To add son Max's cell phone, repeat steps 3a through 3d. His phone number is 208-555-7703.

5. Close the Contact List. The newly-added phone numbers are displayed on the Customer Maintenance screen.

| Contact Type | Number       | Default   | Name      |
|--------------|--------------|-----------|-----------|
| Cell Phone   | 208-555-7700 | Primary   | REX CELL  |
| Cell Phone   | 205-555-7701 | Alternate | MARY CELL |
| Cell Phone   | 208-555-7702 | Other     | Maddie    |
| Cell Phone   | 208-555-7703 | Other     | Max       |

**Note:** To move a phone number or e-mail address to a different spot on the Contact List, select it and click the **Move Up** or **Move Down** button repeatedly. The primary contact method is at the top of the list and the alternate is second from the top.

**Exercise**

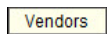
Update the contact information for Rex and Mary Jones. The notations “daughter” and “son” need to be added to the phone numbers for Maddie and Max. You can initiate this change by using either the **Edit Contact** or the **Edit** button on the Customer Maintenance screen.

**Walk-Through: Adding Contact Information to a Vendor Record**

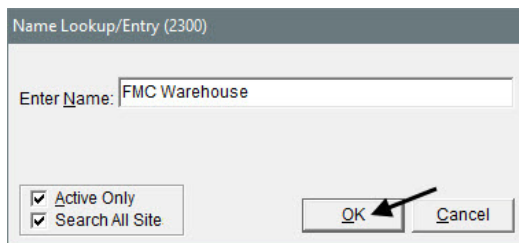
Add the contact information for account manager Ray Evans to the vendor record for FMC Warehouse.

**To add contact information to a vendor record**

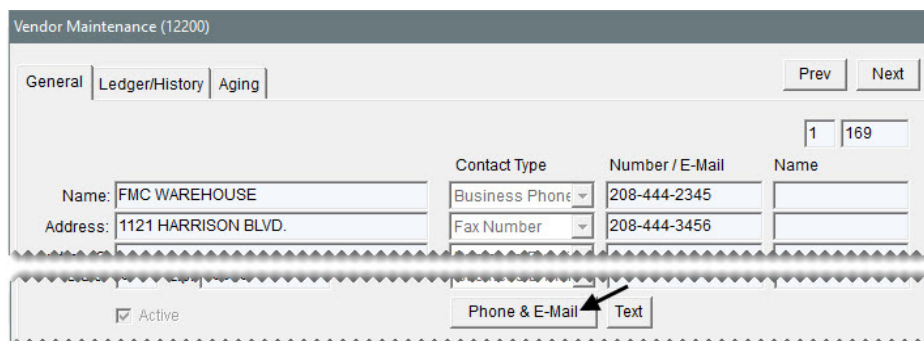
1. Look up the vendor record for FMC Warehouse.
  - a. Click **Vendors**. The Name Lookup/Entry screen appears.



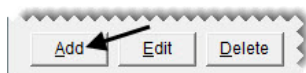
- b. Type **FMC warehouse** and click **OK**. The Vendor Maintenance screen appears.



2. Click **Phone & E-mail**. The Contact List appears.



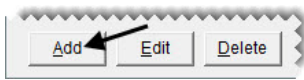
3. Add the office number for Ray Evans.
  - a. Click **Add**. The Add/Edit Contact screen appears.



- b. Select Business Phone from the **Type** drop-down.
  - c. Type **208-444-2345 ext. 500** in the **Number/E-mail** field.
  - d. Type **Ray Acct. Mgr.** in the **Name** field.

- e. To save the new number, click **OK**.

- 4. Add the cell phone number for Ray Evans.
  - a. Click **Add**. The Add/Edit Contact screen appears.



- b. Select **Cell Phone** from the **Type** drop-down.
- c. Type **208-901-8900** in the **Number/E-mail** field.
- d. Type **Ray Acct. Mgr.** in the **Name** field.
- e. Select **Send Text**.
- f. Click **OK**.

- 5. Add the business e-mail address for Ray Evans.
  - a. Click **Add**. The Add/Edit Contact screen appears.



- b. Make sure **Business E-mail** is selected from the **Type** drop-down.
- c. Type **revans@FMC.com** in the **Number/E-mail** field.
- d. Type **Ray Acct. Mgr.** in the **Name** field.
- e. Select **Default E-mail**.

f. Click **OK**.

6. Close the Contact List.

| Contact Type    | Number                | Default   | Name        |
|-----------------|-----------------------|-----------|-------------|
| Business Phone  | 208-444-2345          | Primary   |             |
| Fax Number      | 208-444-3456          | Alternate |             |
| Business Phone  | 208-444-2345 ext. 500 | Other     | Ray Acct. M |
| Cell Phone      | 208-901-8900          | Other     | Ray Acct. M |
| Business E-mail | revans@FMC.com        | Other     | Ray Acct. M |

7. Close the Vendor Maintenance screen.

## Exercise

Update the contact information for FMC Warehouse, so the primary and secondary contact methods include the descriptions Main Phone and Main Fax.





# Using Integrated Products

Using a variety of integrated products with TireMaster can help you perform point of sale tasks easily, quickly, and accurately. This chapter includes the following topics:

- ◆ [“TMText” on page 83](#)
- ◆ [“Tire Guide Pro Plus” on page 85](#)
- ◆ [“Tire Brands” on page 88](#)
- ◆ [“Epicor Integrated Service Estimator” on page 89](#)
- ◆ [“Merchant Partners Payment Processing” on page 95](#)

## TMText

By adding TMText to your TireMaster system, you can send text messages to clients in the following scenarios:

- ◆ Automated appointment reminders can be sent once a day.
- ◆ You can send text messages to individual customers or vendors at any time.
- ◆ You can send customers updates from point of sale, when you change the status of their work orders (for example, from In Progress to Done).
- ◆ You can send customers thank you messages when you complete their invoices.

### Walk-Through: Texting an Update from Point of Sale

The tire installation for Bob Adams is done. Update the status of his work order and send him a text, so he knows his vehicle is ready to be picked up.

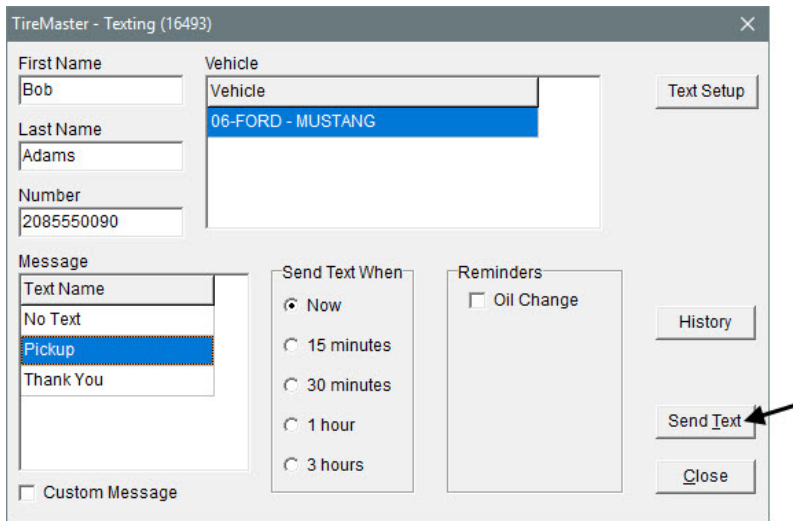
#### To text an update from point of sale

1. Retrieve the work order for Bob Adams.

- On the Invoice Entry screen, select the status **Done**. The TireMaster - Texting screen appears.



- Make sure the Pickup message is selected.
- Make sure **Now** is selected from the list of options for when to send the message.
- Click **Send Text**.



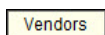
- Close the Invoice Entry and Open Work Order screens.

### Walk-Through: Sending a Text Message to a Vendor

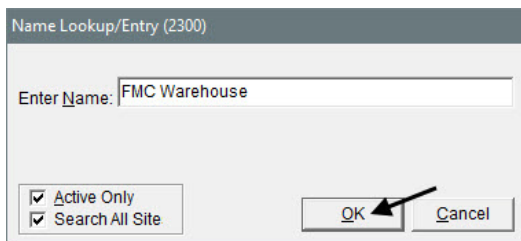
A shipment you're expecting from FMC Warehouse hasn't arrived yet. Send your account manager a text message to ask if the order is on its way.

#### To send a text message to a vendor

- Click **Vendors**. The Name Lookup/Entry screen appears.



- Type **FMC warehouse** and click **OK**. The Vendor Maintenance screen appears.



- Click **Text**. The TireMaster - Texting screen appears.

- Select the **Custom Message** check box.

- Click **Send Text**. The Custom Message screen appears.

- Type the following message: **Hi Ray. Has my order shipped?** Then click **OK**.

- Close the Vendor Maintenance screen.

## Exercise

Complete the invoice for Bob Adams and send him a thank you message when you conclude the sale.

## Tire Guide Pro Plus

With Tire Guide Pro Plus, you can look up tires from TireMaster's invoicing and quoting screens. This fitment guide includes plus sizes and specs for wheels, studs, and lug nuts. Vehicle manufacturers' torque and air pressure recommendations are also available and can be printed on work orders and invoices.

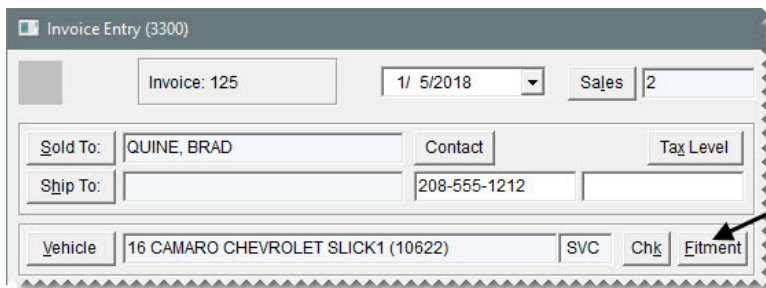
**Note:** Tire Guide Pro plus is developed by Pearl Communications and Tire Guides, Inc.

## Walk-Through: Looking Up Tires with the Fitment Guide

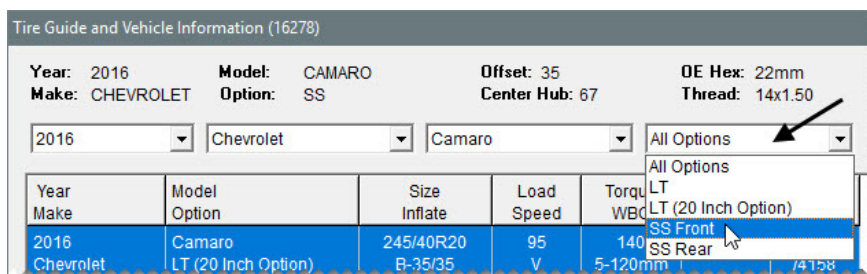
Brad Quine brings his 2016 Chevy Camaro in for a new set of tires. Use the fitment guide to find tires for a staggered application. Mechanic Russell Smith will mount the tires.

### To look up tires with the fitment guide

1. Start a work order for Brad Quine.
  - a. If the Open Work Order List isn't already open, click **Invoicing**.
  - b. Click **New Work Order**.
  - c. Look up the customer Brad Quine, and select the 2016 Chevy Camaro.
  - d. Enter the beginning mileage of **10,622** on the Work Order screen, and click **OK**.
2. On the Invoice Entry screen, click **Fitment**. The Tire Guide and Vehicle Information screen appears.



3. Add the *front* tires to the work order.
  - a. Select SS Front from the options drop-down. The fitment guide limits the vehicle fitment information displayed to only the front and rear SS options.



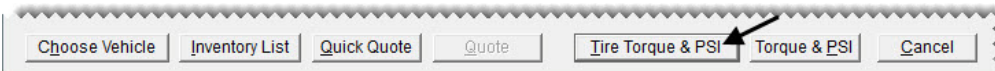
- b. Make sure SS Front is selected.

| Year | Make      | Model  | Option   | Size       | Inflate | Load | Speed | Torqu | WBC     | Rim    | Prefix | Load  | Ply/Weight |
|------|-----------|--------|----------|------------|---------|------|-------|-------|---------|--------|--------|-------|------------|
| 2016 | Chevrolet | Camaro | SS Front | 245/40R20  | F-35/   | 95   | Y     | 140   | 5-120mm | 20x8.5 |        | /4450 |            |
| 2016 | Chevrolet | Camaro | SS Rear  | 275/35ZR20 | R-/35   | 98   | Y     | 140   | 5-120mm | 20x9.5 |        | /4450 |            |

- c. On the list of matching items, select the RE970AS PP Potenza (product code 010915).

| Matching Items |                                     |           |        |            |      |     |
|----------------|-------------------------------------|-----------|--------|------------|------|-----|
| Product Code   | Size / Description                  | Available | Best   | Load/Speed | UTQG | MFG |
| 143608         | P245/40R20 / RE97AS POTENZA         | 4         | 213.64 |            |      | BRI |
| 001286         | 245/40R20XL / AS WIDE OVAL FIREHAWK | 8         | 216.65 |            |      | FIR |
| 000425         | 245/40R20 / RE97AS POTENZA          | 4         | 218.20 |            |      | BRI |
| 000168         | 245/40R20 / RE97 A/S POTENZA        | 12        | 232.85 |            |      | BRI |
| 102825         | 245/40R20XL / S-04 PP POTENZA       | 4         | 271.78 |            |      | BRI |
| 010915         | 245/40R20XL / RE970AS PP POTENZA    | 5         | 294.06 |            |      | BRI |
| 149762         | 245/40R20 / RE950A POTENZA          | 4         | 359.00 |            |      | BRI |

- d. Click **Tire Torque & PSI**. A confirmation message appears.



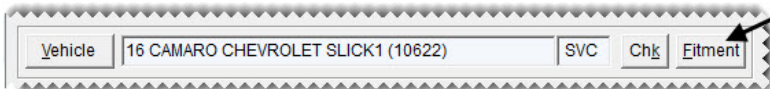
**Note:** The name of this button depends on whether you want to include torque and inflation values on work orders. To include or exclude this information, you need to set the system controls **Work Orders - Fitment Print Air Pressure** and **Work Orders - Fitment Print TRQ**.

- Click **Yes**. These values are displayed on the **WO Notes** tab.
- Change the tire's quantity to **2**, and press **Enter**. The tire's add-on items are added to the work order.

| Quantity | Size        | Description        | Parts  | L |
|----------|-------------|--------------------|--------|---|
| 2        | 245/40R20XL | RE970AS PP POTENZA | 294.06 |   |

- Add the rear tires to the work order.

- a. Click **Fitment**.



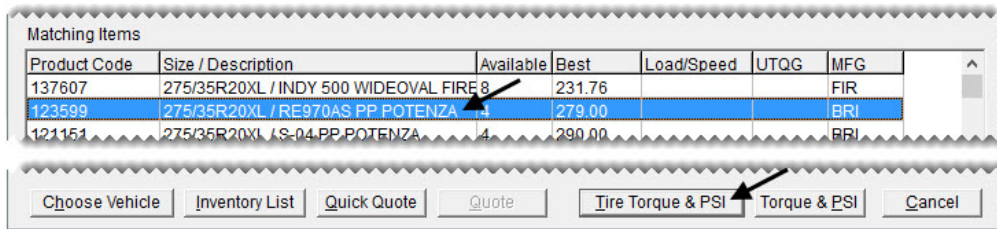
- b. Select **SS Rear** from the options drop-down.

| Tire Guide and Vehicle Information (16278) |                      |                       |                        |         |         |            |            |            |                 |
|--|----------------------|-----------------------|------------------------|---------|---------|------------|------------|------------|-----------------|
| <b>Year:</b> 2016                          | <b>Model:</b> CAMARO | <b>Offset:</b> 35     | <b>OE Hex:</b> 22mm    |         |         |            |            |            |                 |
| <b>Make:</b> CHEVROLET                     | <b>Option:</b> SS    | <b>Center Hub:</b> 67 | <b>Thread:</b> 14x1.50 |         |         |            |            |            |                 |
| 2016                                       | Chevrolet            | Camaro                | All Options            |         |         |            |            |            |                 |
| Year                                       | Make                 | Model                 | Option                 | Size    | Inflate | Load Speed | Torque WBC | Rim Prefix | Load Ply/Weight |
| 2016                                       | Chevrolet            | Camaro                | LT (20 Inch Option)    | B-35/35 | V       | 140        | 5-120mm    |            | /4450           |
| 2016                                       | Chevrolet            | Camaro                | SS Rear                | R-35    | Y       | 140        | 5-120mm    | 20x9.5     | /4450           |
| 2016                                       | Chevrolet            | Camaro                | SS Front               | F-35/   | Y       | 140        | 5-120mm    | 20x8.5     | /4450           |

- c. Make sure **SS Rear** is selected.

| Year | Make      | Model  | Option   | Size       | Inflate | Load Speed | Torque WBC | Rim Prefix | Load Ply/Weight |
|------|-----------|--------|----------|------------|---------|------------|------------|------------|-----------------|
| 2016 | Chevrolet | Camaro | SS Rear  | 275/35ZR20 | R-35    | 98         | 140        | 20x9.5     | /4450           |
| 2016 | Chevrolet | Camaro | SS Front | 245/40ZR20 | F-35/   | 95         | 140        | 20x8.5     | /4450           |

- d. Select the RE970AS PP Potenza (product code 123599), and click **Tire Torque & PSI**.



- 7. Change the tire's quantity to 2, and press **Enter**. The tire's add-on items are added to the work order.

| Quantity | Size        | Description            | Parts  | L |
|----------|-------------|------------------------|--------|---|
| 2.00     | 245/40R20XL | RE970AS PP POTENZA     | 294.06 |   |
| 2.00     | .           | COMPUTER BALANCE - PAS | 0.00   |   |
| 2.00     | .           | RUBBER VALVE STEM      | 1.99   |   |
| 2.00     | .           | STATE TIRE TAX (FEE)   | 3.00   |   |
| 2.00     | .           | PASS ROAD HAZARD WARR. | 29.41  |   |
| 2.00     | .           | TIRE DISPOSAL - PASS.  | 3.00   |   |
| 2        | 275/35R20XL | RE970AS PP POTENZA     | 279.00 |   |

- 8. Assign technician Russell Smith to the work order.
  - a. Click the top row of the **Mech 1** column.
  - b. Type the initials **RS** and press **Enter**. Russell Smith's initials are added to the remaining rows.

| Quantity | Size        | Description            | Parts  | L | Mech 1 | Mech 2 | Flat Rate | ( ^ |
|----------|-------------|------------------------|--------|---|--------|--------|-----------|-----|
| 2.00     | 245/40R20XL | RE970AS PP POTENZA     | 294.06 |   | RS     |        | 0.00      |     |
| 2.00     | .           | COMPUTER BALANCE - PAS | 0.00   |   |        |        | 0.00      |     |
| 2.00     | .           | RUBBER VALVE STEM      | 1.99   |   |        |        | 0.00      |     |
| 2.00     | .           | STATE TIRE TAX (FEE)   | 3.00   |   |        |        | 0.00      |     |
| 2.00     | .           | PASS ROAD HAZARD WARR. | 29.41  |   |        |        | 0.00      |     |
| 2.00     | .           | TIRE DISPOSAL - PASS.  | 3.00   |   |        |        | 0.00      |     |
| 2.00     | 275/35R20XL | RE970AS PP POTENZA     | 279.00 |   |        |        | 0.00      |     |
| 2.00     | .           | COMPUTER BALANCE - PAS | 0.00   |   |        |        | 0.00      |     |

- 9. To close the Invoice Entry screen, click **Quit**.
- 10. Close the Open Work Order List.

## Tire Brands

With the Tire Brands Interface, your TireMaster system can retrieve tire specifications, definitions, and images from the Tire Brands database.

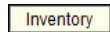
**Note:** The Tire Brands database is compiled and updated by Pearl Communications.

### Walk-Through: Retrieving Tire Brands Specifications

A customer in your showroom asks for detailed information about Bridgestone Serenity Turanza tires (size 205/65R15). Retrieve the specifications for this item.

## To retrieve Tire Brands Specifications

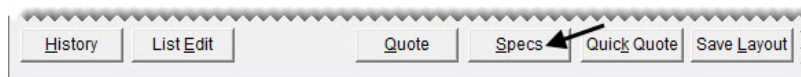
1. Click **Inventory**. The Custom Inventory Lookup screen appears.



2. Type **2056515** in the **Quick Look** row and **Serenity Turanza** in the **Description** row. Then click **OK**. The Inventory List appears.

| Prompt              | Start            | End |
|---------------------|------------------|-----|
| 3 - Quick Look:     | 2056515          |     |
| Description:        | Serenity Turanza |     |
| Product Code Range: |                  |     |

3. Click **Specs**. A browser opens and displays the tire's specifications.



4. To print the specifications sheet, select **Print** from the browser's **File** menu.
5. When you're finished looking at the specs, close the browser and the open TireMaster screens.

# Epicor Integrated Service Estimator

With the Epicor® Integrated Service Estimator (ISE), you can import the descriptions for parts and labor, along with selling prices, labor times, and labor rates, into work orders and vehicle service checklists created in TireMaster.

You can also use the ISE to order parts from suppliers. Depending on how the ISE is set up, you can place orders automatically or manually and define whether TireMaster should create receiving documents for orders placed via the ISE.

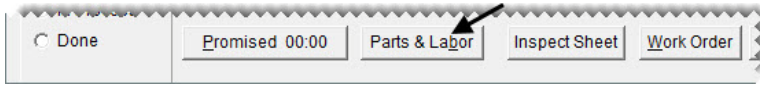
## Walk-Through: Adding Items to a Work Order with the ISE

Kris Johnson is going to replace the front brakes on John Ray's 2006 Ford Mustang, which has 98,122 miles on the odometer. Use the Epicor Integrated Service Estimator to look up the parts and labor times for this job and place an order with your supplier.

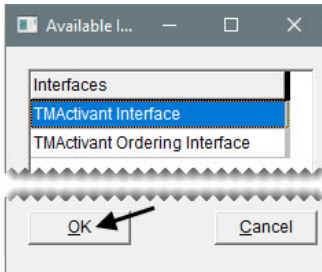
## To add items to a work order with the Integrated Service Estimator

1. Start a work order for John Ray. When you're prompted for a vehicle, select the Ford Mustang.

2. Access the Integrated Service Estimator.
  - a. On the Invoice Entry screen, click **Parts & Labor**. The Available Interfaces screen appears.



- b. Select Activant Interface, and click **OK**. The TM Interface screen appears.

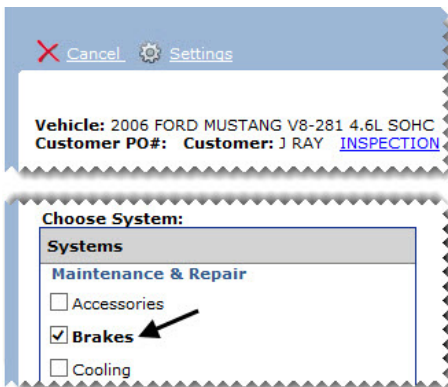


**Note:** If a VIN is not entered for the vehicle in TireMaster, you'll need to define the year, make, and model when the ISE opens.

3. Define the type of work being done.
  - a. Make sure the **Jobs** tab is selected.



- b. Select the **Brakes** check box. The ISE displays a list of various brake jobs.





- c. Select the **Front Brake Job Complete** check box. Then click **Next**.

Quote Jobs Parts Labor Service Intervals Repair Info

ID: 0 VIN: [1ZVFT82H065246123](#) Mileage: 0 EstID:

Next

**Brakes - Custom Jobs**  
Show all Descriptions

**Local Jobs**

4-Wheel Drive Additional Labor (4WD)

---

Front Brake Hoses (BFBH)

**Front Brake Job Complete (BFBC)**

Front Brake Linings (BFBL)

Front Brake Rotors / Drums (BFRD)

- d. For both questions, select **Yes**. Then click **Next**.

Cancel Settings

Repair Info

Next

Vehicle: 2006 FORD MUSTANG V8-28  
Customer PO#: Customer: J RAY

**For Parts**

w/4 WHEEL DISC ?

Yes

No

Don't know

**For Labor**

w/ABS?

Yes

No

Don't know

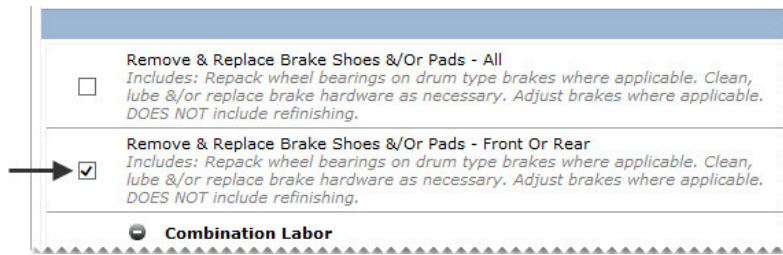
- 4. Choose the parts and labor.
  - a. Select the check box for the brake pads of your choice.

**Job: Front Brake Job Complete (BFBC)**  
Includes replace front brake pads / linings, resurface or replace rotors / drums, repack required. Inspect balance of brake system and related components.

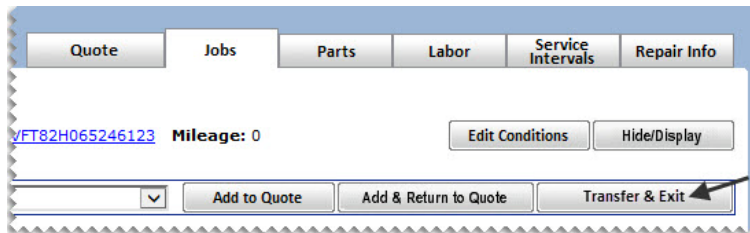
**Parts**

| Avl                                 | Qty                                 | Description                                | Mfr | Part#                   |
|-------------------------------------|-------------------------------------|--|-----|-------------------------|
| <b>F CERAMIC PADS</b>               |                                     |  |     |                         |
| <input checked="" type="checkbox"/> | <input type="checkbox"/>            | 1 AUTOZONE/ DURALAST GOLD CMAX             | DGC | <a href="#">DGC1081</a> |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 1 AUTOZONE/ DURALAST GOLD<br>OE DESIGN     | EPA | <a href="#">DG1081</a>  |
| <input checked="" type="checkbox"/> | <input type="checkbox"/>            | 1 AUTOZONE/ FDP BRAKES<br>SILENT SOLUTIONS | FDP | CSS1081                 |

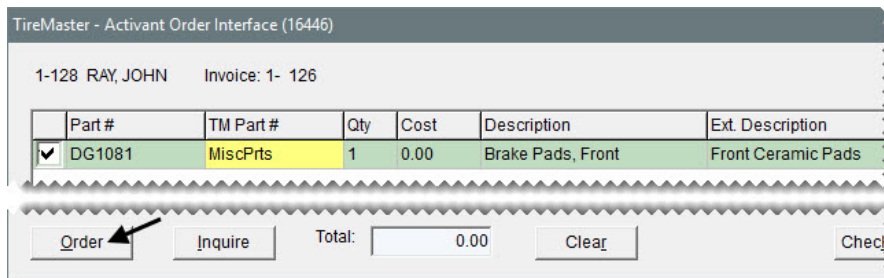
- b. Scroll down to the labor descriptions. Then select the check box for **Remove & Replace Brake Shoes &/Or Pads - Front Or Rear**.



- c. Click **Transfer & Exit**. The TireMaster - Activant Order Interface screen appears.



- d. Click **Order**. The ordering screen closes and the items are added to the work order and a receiving document.



**Note:** The Epicor Interface can be configured to automatically create receiving documents for the orders that are placed.

5. Assign mechanic Kris Johnson to the job.

| Description              | Parts | Labor | FET  | Tax   | Extend | Sales | Mech 1 | Mech 2 | Flat Rate | Cor |
|--------------------------|-------|-------|------|-------|--------|-------|--------|--------|-----------|-----|
| Front Brake Job Complete | 0.00  | 0.00  | 0.00 | parts | 0.00   | KJ    |        |        | 0.00      |     |
| Brake Pads, Front        | 80.98 | 0.00  | 0.00 | both  | 80.98  | KJ    |        |        | 0.00      |     |
| Misc Labor- Interface    | 0.00  | 80.00 | 0.00 | both  | 80.00  | KJ    |        |        | 1.00      |     |

6. To close the work order, click **Quit**.

### Walk-Through: Adding Items to an Estimate with the ISE

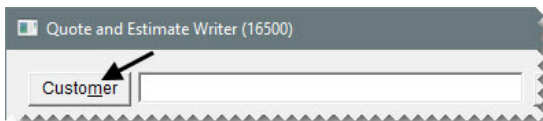
Ruth Evans wants to know how much it'll cost to replace the alternator in her Suburban. When you write her estimate, retrieve the parts and labor for the job from the ISE.

## To add items to an estimate with the ISE

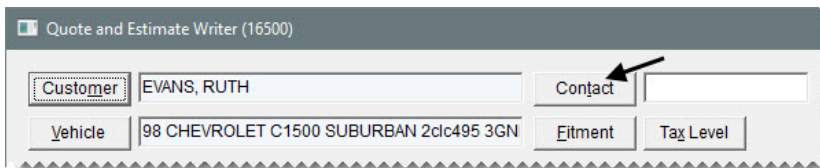
1. Start an estimate for Ruth Evans.
  - a. Press **F12** to open the Quote and Estimate Writer.



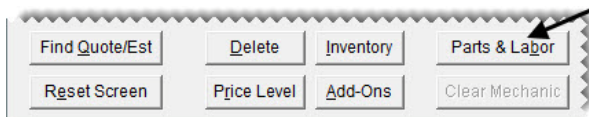
- b. Click **Customer**. Then look up the customer record and vehicle for Ruth Evans.



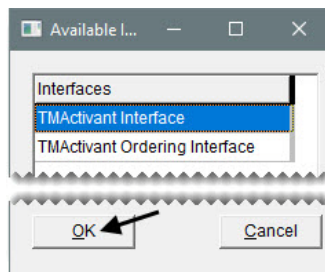
- c. Click **Contact** and select the home phone number from the list that appears.



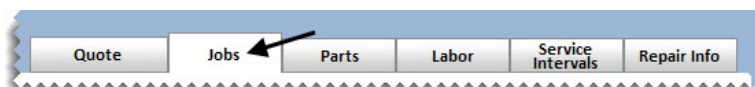
2. Click **Parts & Labor**. The Available Interfaces screen appears.



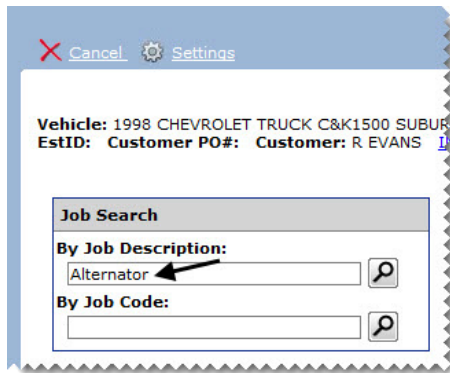
3. Select Activant Interface and click **OK**. The TM Interface screen appears.



4. Define the type of work for which the price is being estimated.
  - a. Make sure the **Jobs** tab is selected.



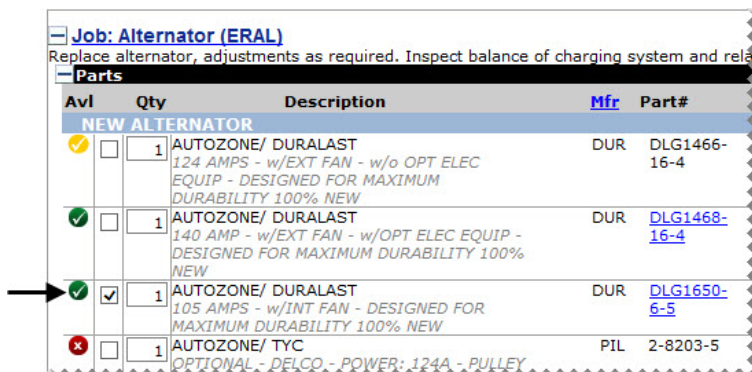
- b. Type **Alternator** in the **Job Search** field and press **Enter**. The ISE displays the alternator replacement job.



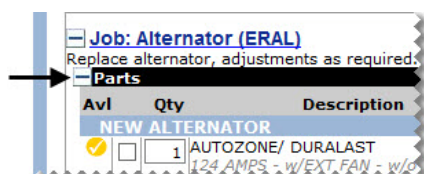
- c. Select the **Alternator** check box. Then click **Next**.



5. Choose the parts and labor.
  - a. Select the check box for the alternator of your choice.



- b. To collapse the list of parts, click  in the upper left corner of the parts list.



- c. On the list of labor items, select the check box for **Remove and Replace Alternator Assembly**.

| Select                              | Labor Description  |
|-------------------------------------|--|
| <input type="checkbox"/>            | Remove & Install and Overhaul Alternator Assembly<br><i>SI Series Alternator</i> |
| <input type="checkbox"/>            | Remove & Install and Overhaul Alternator Assembly<br><i>CS Series Alternator</i> |
| <input checked="" type="checkbox"/> | Remove & Replace Alternator Assembly   |

- d. Click **Transfer & Exit**. The alternator and the labor item are added to the estimate.

Quote Jobs Parts Labor Service Intervals Repair Info

ID: 0 VIN: 3GNEC16R2WG112139

Edit Conditions Hide/Display

Add to Quote Add & Return to Quote Transfer & Exit

6. Save the estimate and print a copy for the customer.

| Q | Auth                                | Incl                                | Status/Qty | Inspection Area/Size  | Description                            | P | Tax  | Date/Total | Notes/Product Code |
|---|-------------------------------------|-------------------------------------|------------|-----------------------|--|---|------|------------|--------------------|
| + | <input type="checkbox"/>            | <input type="checkbox"/>            |            | Under Hood Inspection | Check air filter, drive belts, cooling |   |      | 1/5/2018   |                    |
| - | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | REC        | Alternator            | Replace alternator adjustments as      |   |      | 1/5/2018   |                    |
| - | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 1          | DLG1650-6-5           | Alternator                             | 2 | Both |            | MiscPrts           |
| - | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 0.6        | Labor                 | Remove and Replace Alternator          |   | Both |            | MiscLab            |
|   |                                     |                                     |            |                       |  |   | 7.89 | 316.12     |                    |

Authorized Total 316.12

Print Save Close

7. Close the Quote and Estimate Writer.

## Merchant Partners Payment Processing

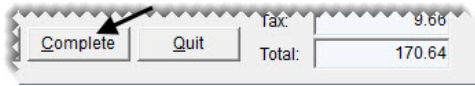
With the interface to Merchant Partners Payment Processing, you can process both credit and debit card payments automatically in TireMaster.

### Walk-Through: Processing a Credit Card with Merchant Partners and Signature Capture

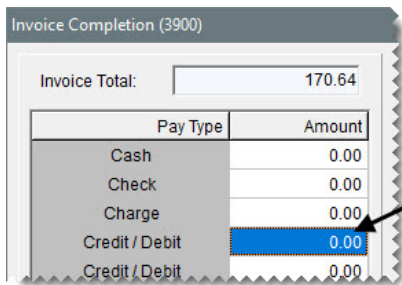
When John Ray returns to pick up his car, he pays for the brake job with his MasterCard and signs to authorize the credit card transaction. The vehicle's ending mileage is 98,123.

## To process a credit card with Merchant Partners

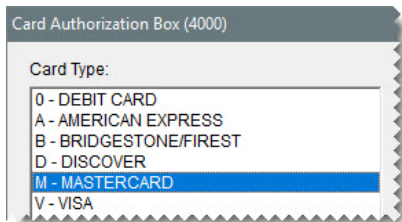
1. Retrieve the customer's work order.
  - a. If the Open Work Order List isn't already open, click **Invoicing**.
  - b. Select John Ray's work order, and click **Select**. The Invoice Entry screen appears.
2. Click **Complete**.



3. Click the first **Credit/Debit** row and press . The Card Authorization Box appears.



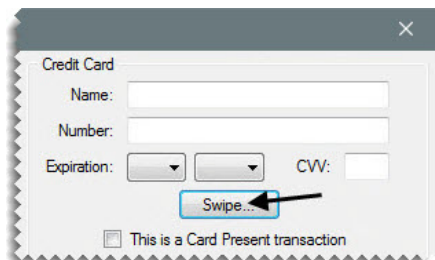
4. For the card type, select MasterCard.



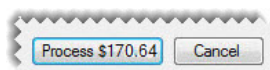
5. Make sure the **Auto Authorize** check box is selected, and click **OK**. The Merchant Partners Credit Card Sale screen appears.



6. Click **Swipe** and swipe the card. The customer's name and card information fill in.

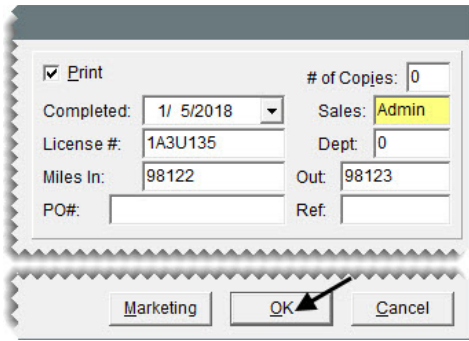


7. Click **Process**. A transaction status message appears.



**Note:** Steps 8 and 9 will be demonstrated by the Training Instructor.

8. Click **OK**. A message on screen will appear requesting the customer's signature.
9. Click **OK** to accept the signature.
10. For the ending mileage, enter **98123**.
11. Click **OK**.



The screenshot shows a software dialog box with a light gray background and a dark gray title bar. The dialog contains several input fields and buttons. At the top left, there is a checked checkbox labeled "Print" and a text field for "# of Copies" containing the value "0". Below this, there are two rows of fields: "Completed:" with a date dropdown set to "1/ 5/2018" and "Sales:" with a dropdown set to "Admin"; "License #:" with the text "1A3U135" and "Dept:" with the value "0". The next row contains "Miles In:" with "98122" and "Out:" with "98123". The final row has "PO#:" and "Ref:" with empty text boxes. At the bottom of the dialog, there are three buttons: "Marketing", "OK", and "Cancel". A black arrow points to the "OK" button.

12. Click **Yes** to complete and print the invoice.





# Setting Up Inventory

With TireMaster’s inventory applications, you can track both the products and services you sell. Setting up inventory includes adding items and assigning codes that make it possible for you to monitor inventory activity. This chapter includes the following topics:

- ◆ “Adding a Basic Vendor” on page 99
- ◆ “Inventory Identification and Classification Methods” on page 101
- ◆ “Adding Inventory Items” on page 102
- ◆ “Updating Items with Inventory List Editing” on page 111

## Adding a Basic Vendor

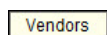
Before you can generate purchase orders and receive inventory with your TireMaster system, you need to add vendor records for your suppliers.

### Walk-Through: Adding a Vendor

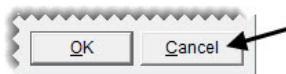
Pep Boys just opened a new store five minutes away from your shop. Add a vendor record for this new supplier, and include the contact information for your Pep Boys account manager.

#### To add a vendor

1. Click **Vendors**. The Name Lookup Entry screen appears.



2. Click **Cancel**. The Vendor Maintenance screen appears.



3. Click **Add**. The Name Lookup Entry screen appears.



4. Type **Pep Boys** and click **OK**. The Vendor Maintenance screen appears with the vendor's name filled in.

5. Add the vendor's address.
  - a. For the street address, type **590 S. Stratford Drive**.
  - b. Type the zip code **83642**. The Zip Codes screen appears.
  - c. Make sure the Meridian, ID zip code is selected and click **OK**. The city and state fill in for you automatically.

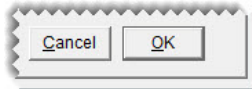
6. Add the vendor's contact information.
  - a. For the first contact type, make sure Business Phone is selected. Then type the phone number **208-555-2697** and the name (description) **Main Number**.
  - b. For the second contact type, select Fax Number. Then type the fax number **208-555-2698** and the name **Main Fax**.
  - c. For the third contact type, select Cell Phone. Then type the phone number **208-555-3300** and **Brad Acct Mgr** for the name.

- d. For the fourth contact type, select Business E-Mail. Then type the e-mail address **brad@pepparts.com** and **Brad Acct Mgr** for the name.

The screenshot shows a window titled 'Vendor Maintenance' with 'Prev' and 'Next' buttons at the top. Below these are two input fields containing '1' and '217'. The main area is a table with three columns: 'Contact Type', 'Number / E-Mail', and 'Name'.

| Contact Type   | Number / E-Mail   | Name          |
|----------------|-------------------|---------------|
| Business Phone | 208-555-2697      | Main Number   |
| Fax Number     | 208-555-2698      | Main Fax      |
| Cell Phone     | 208-555-3300      | Brad Acct Mgr |
| Business E-mai | brad@pepparts.com | Brad Acct Mgr |
| Business E-mai |                   |               |

7. Click **OK** to save the new vendor.



8. Close the Vendor Maintenance screen.

## Inventory Identification and Classification Methods

Inventory records in TireMaster are assigned various numbers and codes that help you identify and classify the items you sell. Three of the most commonly assigned identification and classification methods are the following:

- ◆ **Manufacturer Codes:** Identify the manufacturers who produced items. Examples of manufacturer codes include BRI (Bridgestone), GDY (Goodyear), and UNI (Uniroyal).
- ◆ **Categories:** Identify items that are similar to each other. Categories are the primary method of organizing items on sales and inventory reports. Examples of categories include TIPA (Tires - Passenger), TILT (Tires - Light Truck), SPAU (Parts - Service), and LBME (Labor - Mechanical).
- ◆ **Groups:** Provide another means of identifying items that are similar to each other. Inventory groups are the secondary method of organizing sales and inventory report information. Examples of groups include Tires, Services, and Batteries.

**Tip:** If you're having trouble differentiating categories and groups, keep in mind that categories identify a specific set of items (such as *Tires - Passenger* and *Tires - Light Truck*) and groups identify a general set of items (such as *Tires*).

Manufacturer codes, categories, and groups can all be used to look up items and organize information on reports. The number of categories and groups that you use affects the number of subtotals on your reports. For example, if you set up categories that classify tires by both make and type (such as *Tires - Passenger - General* and *Tires - Light Truck - General*), your reports will be more detailed than if your categories classify your tires by type only (such as *Tires - Passenger*).

# Adding Inventory Items

When you add an inventory item, you need to complete a variety of settings that provide information about it. Some settings describe the item, while others define how it should be handled when it's included in transactions. Some of the most important settings for an item determine how it's priced.

When adding items to the inventory, you also need to classify them as either inventoriable or noninventoriable:

- ◆ **Inventoriable items:** Items for which you track both the costs and the quantities. You should classify an item as inventoriable if you typically keep it in stock, include it in physical counts, and show profit and loss information for it on reports.
- ◆ **Noninventoriable items:** Items for which you track the costs but not the quantities. Examples of noninventoriable items include labor, nonstock service parts, fees, warranties, and hard-to-track items such as valve stems.

**Note:** Typically, noninventoriable items are used as up-sell items that enable you to earn more money from your sales. In TireMaster, those up-sell items are known as add-ons. When you're going online, set up your noninventoriable items first.

# Adding Noninventoriable Items

A noninventoriable item is an item for which you track only the cost. To track the costs of noninventoriable items, you need to use noninventoriable costing methods.

With noninventoriable costing methods, you define which amount to use as an item's cost and when to post that cost to the general ledger. There are three noninventoriable costing methods that you can use:

- ◆ **Expense Method:** An item's cost posts to the general ledger when you buy the item from a vendor. The Expense Method is often used for low-cost and labor items that will not significantly affect the income statement, such as valve stems, wheel weights, and bulk oil.
- ◆ **Option-Cost Method:** You enter the item's actual cost at point of sale. If the item has federal excise tax, you also need to include it in the item's cost. The Option-Cost Method is typically used for nonstock parts, such as brake pads. You can also use the Option-Cost Method for nonstock or special order tires.
- ◆ **Relief-Percent Method:** An estimated cost for an item posts to the general ledger when it is sold. This estimated cost is a percentage of the item's parts price. The Relief-Percent Method can be used for nonstock tires, oil filters, and air filters.

## Walk-Through: Adding a Noninventoriable Item

Add an item for oil disposals, using the product code 15 and the quick look code DSPOIL. The price for this item is \$2.00.

### To add a noninventoriable item

1. Click **Inventory**. The Custom Inventory Lookup screen appears.

Inventory

2. Look up an item that's similar to the one you're adding.
  - a. Type the code **DSP** in the **Quick Look** row, and click **OK**. The Inventory List appears.

Custom Inventory Lookup (8100)

Past Lookups: [Dropdown]

1 Standard | 2 Receiving | 3 Pricing | 4 Editing | 5 Other

| Prompt          | Start | End |
|-----------------|-------|-----|
| 3 - Quick Look: | DSP   |     |
| Description:    |       |     |

Clear OK Cancel

- b. Select the light truck tire disposal and click **OK**. The Inventory Maintenance screen appears.

Inventory List (2000)

| Prod Code | Size | Description           | Availa |
|-----------|------|-----------------------|--------|
| 43        |      | TIRE DISPOSAL - LT.   |        |
| 16        |      | TIRE DISPOSAL - PASS. |        |

OK Cancel

**Tip:** Looking up a similar item helps you save time, because you can reuse many of its settings for the new item.

3. Click **Add**. TireMaster prompts you for the new item's product code.

Find Add Edit Delete

4. For the product code, type **15** and click **OK**.

Add New Inventory (1000)

New Product Code:

15

OK Cancel

5. Enter the following information for the new item:
  - ♦ For the description, type **Oil Disposal**.

- ◆ Change the quick look code to **DSPOIL**.

The screenshot shows the 'Inventory Maintenance (12300)' window with the 'General' tab selected. The 'Quick Look' field is set to 'DSPOIL' and the 'Group' is 'DISPOSALS'. Arrows point to the 'Description' and 'Quick Look' fields.

- ◆ Make sure the letter **N** is entered in the **Inventory (Y/N)** field.

The screenshot shows a form with 'Part#: 1 43' and 'Inventory (Y/N): N'. An arrow points to the 'N' in the 'Inventory (Y/N)' field.

- Assign an inventory category and GL code.
  - Click the **Category** field and press [F7]. Then select OILU - Oil & Lube from the list that appears, and click **OK**.
  - Click the **GL** field and press [F7]. Then select DISP - Used Oil Disposal from the list that appears, and click **OK**.

The screenshot shows a dialog box with 'Category: OILU' and 'GL: DISP' highlighted. Arrows point to these fields. 'OK' and 'Cancel' buttons are at the bottom.

- Click **OK**. TireMaster prompts you to price the item.

The screenshot shows a dialog box with 'OK' and 'Cancel' buttons. An arrow points to the 'OK' button.

- Click **Yes**. The Site Prices and Quantity screen appears.

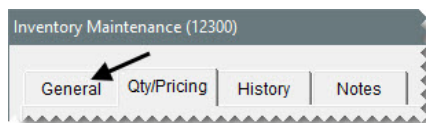
9. For the parts price, type **2.00**.

10. To save your changes, click **OK**. TireMaster prompts you to use the base price as the last cost.



11. Click **OK**.

12. Click the **General** tab. Then close the Inventory Maintenance screen.



## Exercises

- A. Set up an item for tracking nonstock light truck tires. Because your employees will need to enter the cost for these items at point of sale, make sure the setting to force the option cost is enabled. Also assign the bronze add-on code, the category for light truck tires, and the GL code for noninventory light truck tires.
- B. Add a \$2.00 senior citizen discount item.

## Creating Add-Ons

With add-ons, you can automatically include additional items and services such as alignments, warranties, and disposal fees on work orders. Using add-ons reduces the amount of time needed to create a work order, because you don't have to add each item one at a time. Using add-ons can help you increase sales, because they remind you to suggest additional items and services to customers.

Add-on packages are made up of the following:

- ◆ An add-on code
- ◆ One or more associated items

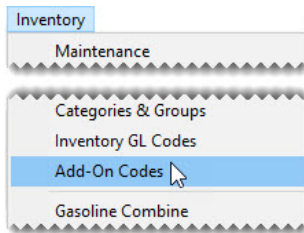
The add-on code can be assigned to items in your inventory. Items that have been assigned add-on codes are referred to as parent items, because they're the main items that are put on work orders. Tires, batteries, and oil changes are examples of parent items. Valve stems, disposal fees, and warranties are examples of add-on items.

## Walk-Through: Creating an Add-On

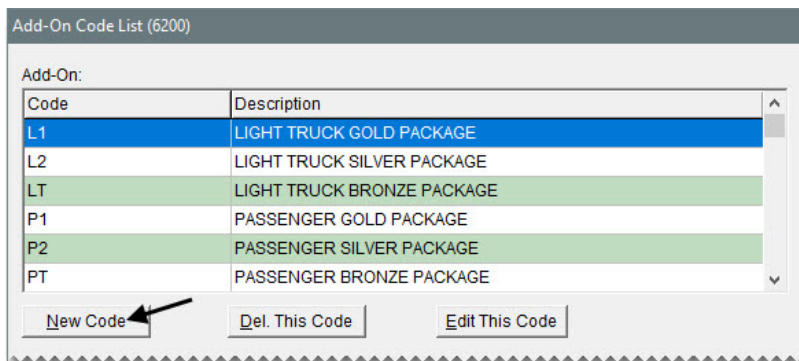
Create the add-on code OC, which will be used for oil changes. Then assign the oil disposal item that you just created to the add-on.

### To create an add-on

1. Define the add-on code.
  - a. From the **Inventory** menu, select **Add-On Codes**. The Add-On Code List appears.

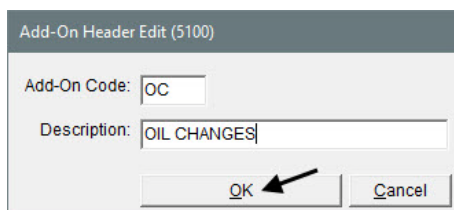


- b. Click **New Code**. The Add-On Header Edit screen appears.



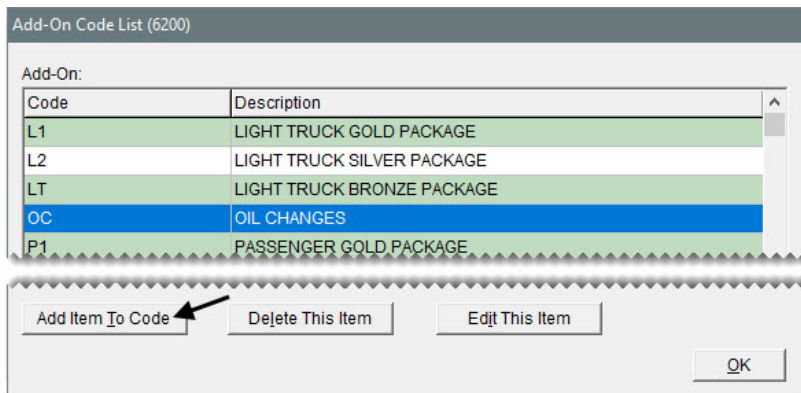
- c. For the name of the add-on code, type **OC**.
 

**Tip:** Name add-on codes based on the type of parent items they'll be assigned to, such as light truck tires. This naming method helps others understand which add-on codes to assign to parent items.
    - d. For the description, type **oil changes**.
    - e. To save the new code, click **OK**.

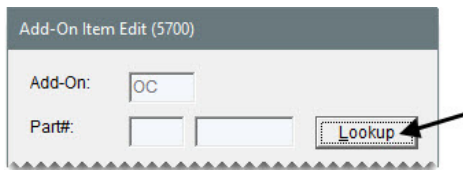




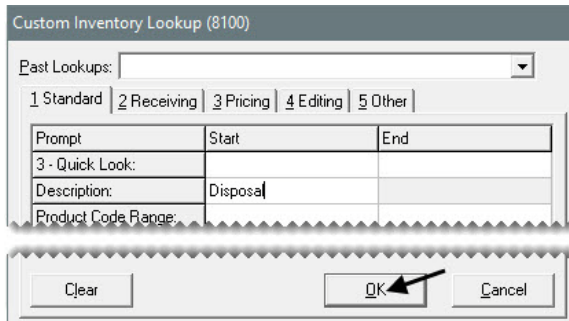
2. Associate an item with the new add-on code.
  - a. Make sure the code OC is selected, and click **Add Item to Code**. The Add-On Item Edit screen appears.



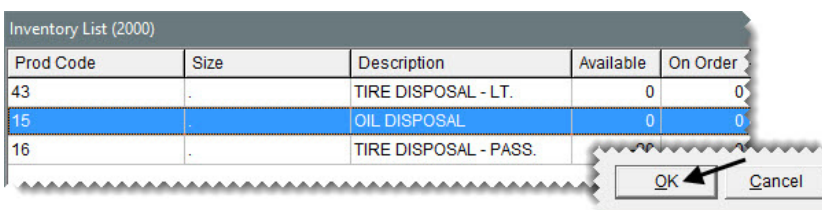
- b. Click **Lookup**. The Custom Inventory Lookup screen appears.



- c. Type **Disposal** in the **Description** row and click **OK**. The Inventory List appears.

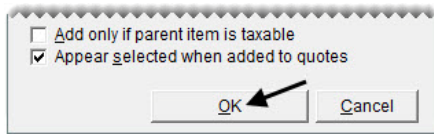


- d. Select the oil disposal item and click **OK**.

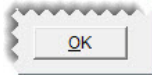


- e. To automatically include oil disposals in prices calculated for quotes, select the **Appear selected when added to quotes** check box.

f. Click **OK**.



3. To close the Add-On Code List, click **OK**.



## Exercises

- A. Assign the add-on code OC to the inventory item for oil changes.
- B. Assign the following items to the add-on code L1:
- ◆ Computer balance
  - ◆ Valve stem
  - ◆ State tire tax
  - ◆ Tire disposal
  - ◆ 2 Year Road Hazard Warranty (The price of the warranty is 10% of the parent item's price.)
  - ◆ Alignment (Set a fixed quantity of 1 for the alignment.)

When you assign these items to the add-on code, make sure they'll be selected on quotes.

**Note:** For additional information about assigning items and descriptions of each field, press **F1**.

# Adding Inventoriable Items

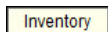
Inventoriable items are those items for which you track both the costs and quantities.

## Walk-Through: Adding an Inventoriable Item

Add a Firestone tire to the inventory. The tire's product code is 067911 and the size is P225/60R16. For the quick look code, use the tire's size without letters or slashes. Also include a note that indicates this is a specialty tire.

### To add an inventoriable item

1. Click **Inventory**. The Custom Inventory Lookup screen appears.



2. Look up an item that's similar to the one you're adding.
  - a. Type **2256016** in the **Quick Look** row and **Firehawk** in the **Description** row, and click **OK**. The Inventory List appears.

Custom Inventory Lookup (8100)

Past Lookups: [dropdown]

1 Standard | 2 Receiving | 3 Pricing | 4 Editing | 5 Other

|                     |          |     |
|---------------------|----------|-----|
| Prompt              | Start    | End |
| 3 - Quick Look:     | 2256016  |     |
| Description:        | Firehawk |     |
| Product Code Range: |          |     |

Clear OK Cancel

- b. Select the PVS Firehawk tire with product code 098388 and click **OK**. The Inventory Maintenance screen appears.

| Prod Code | Size       | Description           | Available | On Order |
|-----------|------------|-----------------------|-----------|----------|
| 138559    | P225/60R16 | AS WIDE OVAL FIREHAWK | 8         | 0        |
| 098388    | P225/60R16 | PVS FIREHAWK          | 12        | 0        |

OK Cancel

3. Click **Add**. TireMaster prompts you for the new item's product code.

Find Add Edit Delete

4. For the product code, type **067911** and click **OK**.

Add New Inventory (1000)

New Product Code:

067911

OK Cancel

5. Change the following information.
  - a. For the description, type **PV41 Firehawk**.

Inventory Maintenance (12300)

General Qty/Pricing History Notes

Product Code: 067911

Size: P225/60R16 Rim Size: 16.00

Description: PV41 FIREHAWK

- b. Make sure the letter **Y** is entered in the **Inventory (Y/N)** field.

A screenshot of a software window with a title bar. At the top are 'Prev' and 'Next' buttons. Below is a 'Part#' field containing '1' and '5228'. Underneath is an 'Inventory (Y/N):' field with the letter 'Y' entered, and an arrow pointing to it. Below that is a 'Type (G,C,F,D):' field which is empty.

- c. For the first vendor part number, type **107621485**.

A screenshot of a software window with a title bar. It contains two 'Vendor Part Number' fields. The first field contains '107621485' with an arrow pointing to it. The second field is empty. Below these are two 'Recon Code' fields, both of which are empty.

6. Enter the following specifications:

- ◆ For the load index and speed rating, type **97/V**.
- ◆ For the load range, type **SL**.
- ◆ For the warranty, type **0**.
- ◆ For the Uniform Tire Quality Grade, type **340-A-A** (treadwear rating is 340, traction rating is A, and temperature rating is A).
- ◆ For the sidewall, type **BW**.

A screenshot of a software window with a title bar. It contains several input fields for specifications: 'Load / Speed:' with '97V', 'Load Range:' with 'SL', 'Warranty:' with '0', 'UTQG:' with '340-A-A', 'Sidewall:' with 'BW', and 'Core Item:' which is empty.

7. Click **OK**. TireMaster prompts you to price the item.

A screenshot of a small dialog box with a title bar. It contains two buttons: 'OK' and 'Cancel'. An arrow points to the 'OK' button.

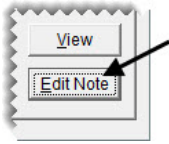
8. Click **No**. You'll price the item later.

9. Add a note to the item.

- a. Click the **Notes** tab.

A screenshot of a software window titled 'Inventory Maintenance (12300)'. It has a tabbed interface with four tabs: 'General', 'Qty/Pricing', 'History', and 'Notes'. An arrow points to the 'Notes' tab.

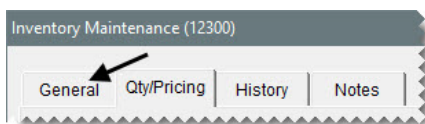
- b. Click **Edit Note**.



- c. Type the following: **This tire was designed for use by law enforcement and high-speed emergency vehicles.**
- d. To save the note, click **OK**.

 A screenshot of the 'Inventory Maintenance (12300)' window. The 'Notes' tab is selected. The window shows fields for Site#, Part#, and Description. The Description field contains 'PV41 FIREHAWK : 067911 : P225/60R16'. Below this, a text area contains the note: 'This tire was designed for use by law enforcement and high-speed emergency vehicles.' At the bottom right, there are 'OK', 'Cancel', and 'View' buttons. An arrow points to the 'OK' button.

10. Click the **General** tab, and close the Inventory Maintenance screen.



## Updating Items with Inventory List Editing

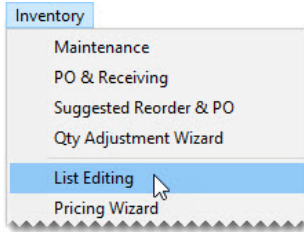
With Inventory List Editing, you can update the settings for several items on a screen that's similar to a spreadsheet. The Inventory List Editing screen is split into two panes. The top pane includes basic properties for items, such as size, product code, and group. The bottom pane is for price, cost, and stocking-level settings.

### Walk-Through: Updating Items with Inventory List Editing

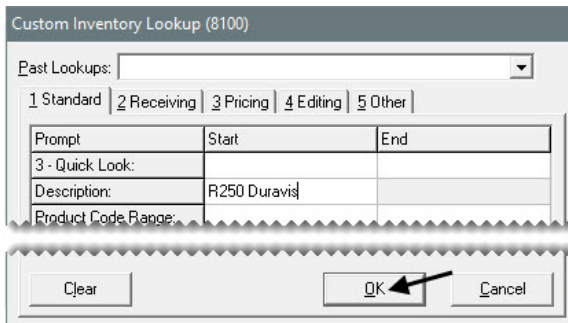
Use Inventory List Editing to set the minimum quantity for a sample of items. For each Bridgestone R250 Duravis tire, set the minimum quantity to 4.

## To update items with Inventory List Editing

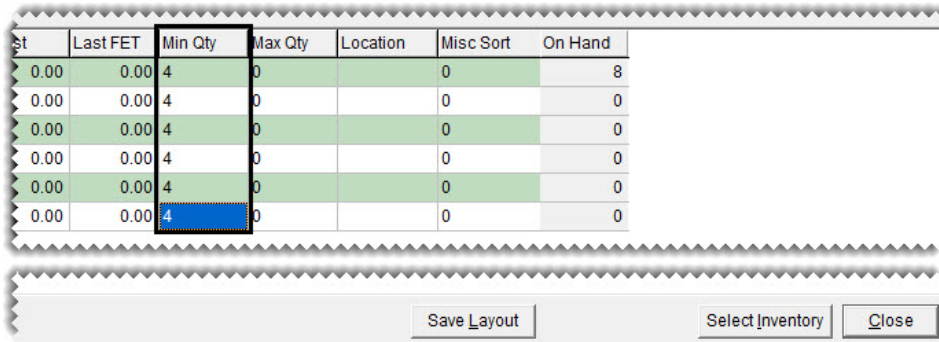
1. From the **Inventory** menu, select **List Editing**. The Custom Inventory Lookup screen appears.



2. Type **R250 Duravis** in the **Description** row, and click **OK**.



3. In the bottom pane of the Inventory List Editing screen, go to the **Min Qty** column.
4. Make sure a minimum quantity of **4** is entered for each tire.



5. Close the Inventory List Editing screen.

### Exercise

Use Inventory List Editing to assign the add-on code LT to all Goodyear HT Wrangler light truck tires.

# Pricing Items

TireMaster offers a variety of options for pricing the products and services you sell. This chapter includes the following topics:

- ◆ “Pricing Items with Factor-Based Calculations” on page 113
- ◆ “Using the Pricing Wizard to Update Prices” on page 117
- ◆ “Setting Up a Sale” on page 119
- ◆ “Using a Price Matrix” on page 122
- ◆ “Updating Prices with XML Spreadsheets” on page 126

## Pricing Items with Factor-Based Calculations

You can calculate the price of items using either a markup or a margin. For these types of price calculations, you need to define a factor, which is a number that’s used to calculate the markup or margin. Depending on the pricing method, the factor is either multiplied or divided by an item’s base price or last cost.

### Markups

A markup is an amount that’s added to your cost for an item. To calculate an item’s price with a markup, TireMaster uses the following formula: **Item Cost x Factor = Parts Price**.

For markups, enter the following settings for an item on the Site Prices and Quantity screen:

- ◆ In the **Op** (operator) field, type an **M**.
- ◆ In the **Factor** field, type the factor as a decimal.

**Note:** To access the Site Prices and Quantity screen, search for the item. When the Inventory Maintenance screen opens, click the **Qty/Pricing** tab and then click **Detail/Edit**.

In Figure 17, TireMaster calculates a 30% markup for an item. The **M** in the **Op** field tells TireMaster to multiply the item's cost of **62.92** (the base price) by the factor of **1.30**. The result is the new parts price of \$81.7960 (which is rounded to \$81.80).

|               |         |            |         |
|---------------|---------|------------|---------|
| Last FET:     | 0.0000  | Parts:     | 81.77   |
| Next FET:     | 0.0000  | Labor:     | 0.0000  |
| Price Matrix: | None    | EDL:       | 81.7700 |
| Relief %:     | 0.0000  | Flat Rate: | 0.0000  |
| Price By:     | C       | Op:        | M       |
|               |         | Factor:    | 1.3000  |
| Base Price:   | 62.9000 | Std Cost:  | 0.0000  |
| Last Cost:    | 62.9000 | Next Cost: | 62.9000 |
| Core Cost:    | 0.0000  |            |         |

**Figure 17:** Calculating a Markup

To determine what number to type in the **Factor** field for markups, add 100% to the markup percentage that you want to use. The total is the factor. For example, if you want a 21% markup, use the following calculation: **100% + 21% Markup = 121% Factor**. Then change the factor to a decimal. In this instance, you'd type **1.21** in the **Factor** field.

Table 1 shows you the amount to type in the **Factor** field to calculate various markups.

**Table 1: Markup Factors**

| Markup | Amount to type in the Factor field |
|--------|------------------------------------|
| 10%    | 1.10                               |
| 15%    | 1.15                               |
| 20%    | 1.20                               |
| 25%    | 1.25                               |
| 30%    | 1.30                               |

Once you have completed the settings on the Site Prices and Quantity screen, use the Pricing Wizard to recalculate the price with the new factor. For more information, see [“Using the Pricing Wizard to Update Prices” on page 117](#).

## Margins

A margin is the difference between your cost and the selling price of an item—in other words, the profit you want to make. To calculate an item's price with a margin, TireMaster uses the following formula:  
**Item Cost ÷ Factor = Parts Price.**

For margins, enter the following settings for an item on the Site Prices and Quantity screen:

- ◆ In the **Op** (operator) field, type **D**.



- ◆ In the **Factor** field, type the factor as a decimal.

**Note:** To access the Site Prices and Quantity screen, search for the item. When the Inventory Maintenance screen opens, click the **Qty/Pricing** tab and then click **Detail/Edit**.

In Figure 18, TireMaster calculates a 20% margin for an item. The **D** in the **Op** field tells TireMaster to divide the item's cost of **37.94** (the base price) by the factor of **.80**. The result is the new parts price of \$47.4250 (which is rounded to \$47.43).

The screenshot shows a pricing screen with the following fields and values:

|               |         |            |         |
|---------------|---------|------------|---------|
| Last FET:     | 0.0000  | Parts:     | 47.425  |
| Next FET:     | 0.0000  | Labor:     | 0.0000  |
| Price Matrix: | None    | EDL:       | 47.4250 |
| Relief %:     | 0.0000  | Flat Rate: | 0.0000  |
| Price By:     | C       | Op:        | D       |
| Factor:       | 0.8000  |            |         |
| Base Price:   | 37.9400 | Std Cost:  | 0.0000  |
| Last Cost:    | 37.9400 | Next Cost: | 37.9400 |
| Core Cost:    | 0.0000  |            |         |

**Figure 18:** Calculating a Margin

To determine what number to type in the **Factor** field for margins, subtract the margin percent from 100%. The difference is the factor. For example, if you want a 40% margin, use the following calculation: **100% – 40% Margin = 60% Factor**. Then change the factor to a decimal. In this instance, you'd type **.60** in the **Factor** field.

The following table shows the amount to type in the **Factor** field to calculate various margins.

**Table 2: Margin Factors**

| Margin | Amount to type in the Factor field |
|--------|------------------------------------|
| 10%    | .90                                |
| 15%    | .85                                |
| 20%    | .80                                |
| 25%    | .75                                |
| 30%    | .70                                |

Once you have completed the settings on the Site Prices and Quantity screen, use the **Recalculate** button to update the item's price, or use the Inventory Pricing Wizard to recalculate the prices of items in a group.

### Walk-Through: Updating an Item's Price with a Factor-Based Calculation

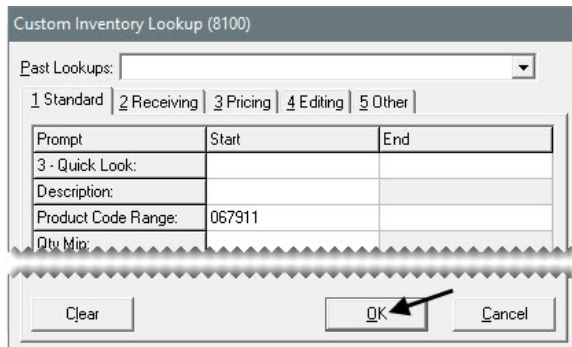
Price the new Firestone tire by performing a factor-based price calculation. First, define the base price, last cost, and factor for the item. Then use the **Recalculate** button to calculate the item's selling price.

## To price an item with a factor-based calculation

1. Look up the Firehawk PV41 tire.
  - a. Click **Inventory**. The Custom Inventory Lookup screen appears.



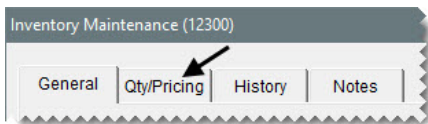
- b. Type **067911** in the product range row, and click **OK**. The Inventory List appears with the Firehawk tire selected.



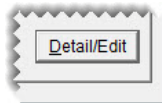
- c. Click **OK** (again).



2. Access the item's pricing information.
  - a. Click the **Qty/Pricing** tab.



- b. Click **Detail Edit**.



3. Define the item's cost and factor.
  - a. Leave the operator (**Op** field) set to **D**.
  - b. For the base price, type **181.00**.
  - c. For the last cost, type **181.00**.
  - d. For the factor, type **.70**.

- e. Click **Recalculate**, and click **Yes** when the confirmation appears. The item's parts price is calculated with a 30% margin.

The screenshot shows a dialog box with the following fields and values:

|             |            |             |        |         |        |
|-------------|------------|-------------|--------|---------|--------|
| Price By:   | B          | Op:         | D      | Factor: | 0.7000 |
| Base Price: | 181.0000   | Std Cost:   | 0.0000 |         |        |
| Last Cost:  | 181.0000   | Next Cost:  | 0.0000 |         |        |
| Core Cost:  | 0.0000     |             |        |         |        |
| Sale Begin: | 01/01/1990 | Sale Parts: | 0.0000 |         |        |
| Sale End:   | 01/01/1990 | Sale Labor: | 0.0000 |         |        |
|             |            | Sale Price: | 0.0000 |         |        |

Buttons at the bottom: Recalculate (highlighted with an arrow), OK, Cancel.

- f. To save your changes, click **OK**.

The screenshot shows a close-up of the bottom right corner of the dialog box, with the OK button highlighted by an arrow.

4. Close the Inventory Maintenance screen.

## Using the Pricing Wizard to Update Prices

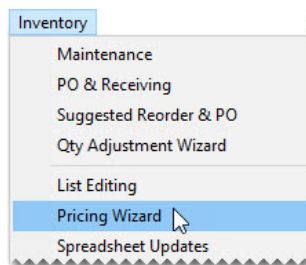
Multiple price changes for a group of inventory items can be completed using the Pricing Wizard.

### Walk-Through: Updating Tire Prices with the Pricing Wizard

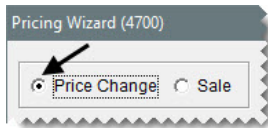
Goodyear has announced a 3% price increase for all tires. To change the prices of your Goodyear tires, use the Pricing Wizard to update the last cost amounts and recalculate the prices based on the factors assigned to those items.

#### To update prices

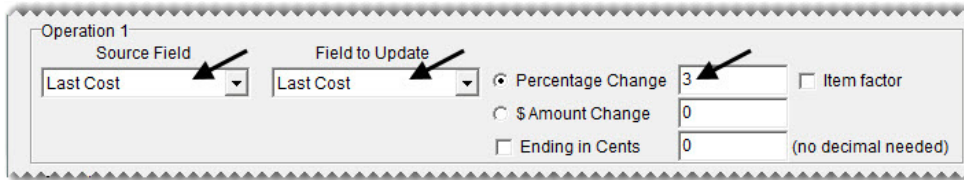
1. From the **Inventory** menu, select **Pricing Wizard**. The Pricing Wizard opens.



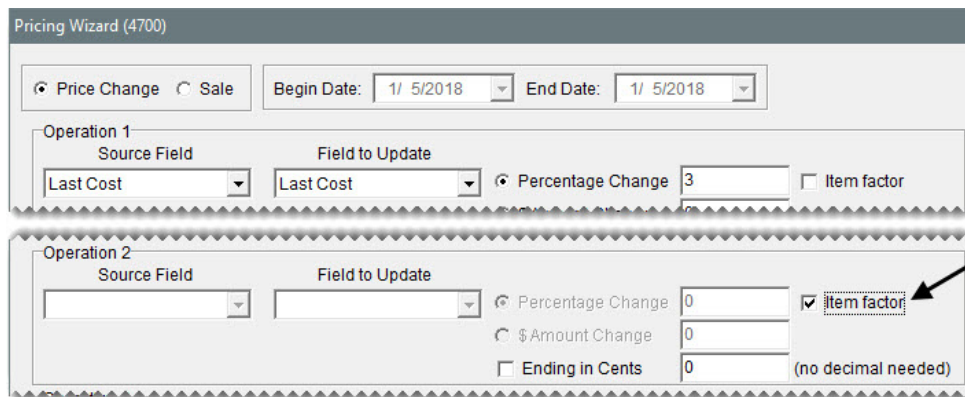
2. Make sure **Price Change** is selected.



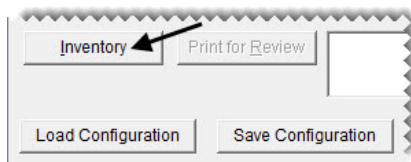
3. Define how to update the prices of the affected items under Operation 1.
  - a. For the **Source Field**, select Last Cost.
  - b. For the **Field to Update**, select Last Cost.
  - c. Make sure **Percentage Change** is selected, and type **3**.



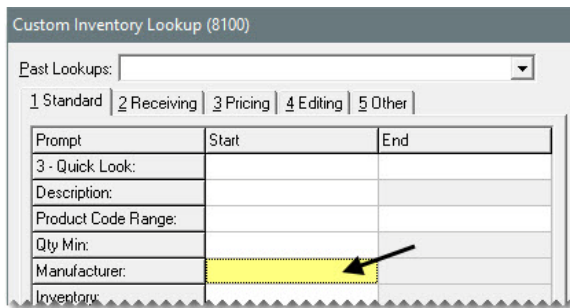
4. Under Operation 2, select the **Item Factor** check box.



5. Look up the items for which the last cost and parts prices will be updated.
  - a. Click **Inventory**. The Custom Inventory Lookup screen appears.



- b. Click the **Manufacturer** row, and press . Then select Goodyear from the list that appears.

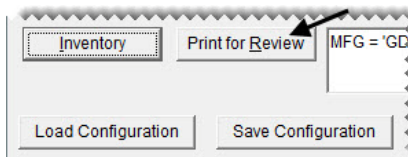


| Prompt              | Start | End |
|---------------------|-------|-----|
| 3 - Quick Look:     |       |     |
| Description:        |       |     |
| Product Code Range: |       |     |
| Qty Min:            |       |     |
| Manufacturer:       |       |     |
| Inventory:          |       |     |

- c. Click **OK** to finish the search. The items are added to the Pricing Wizard.



6. To preview the pending cost and price changes, click **Print for Review**. The Report Window opens.



7. Print the Pricing Wizard Report. Then close the Report Window.
8. Finish the price update.
- a. Click **Apply**. TireMaster prompts you to confirm the changes.



- b. Click **Yes**.
- c. Click **OK** to close the completion message and the Pricing Wizard.

## Setting Up a Sale

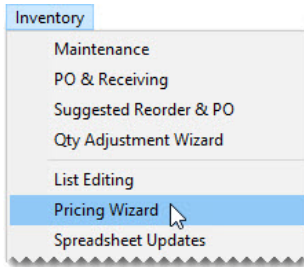
You can use the Pricing Wizard to set temporary prices for items and the dates when those temporary prices will be in effect.

### Walk-Through: Setting Up a Sale

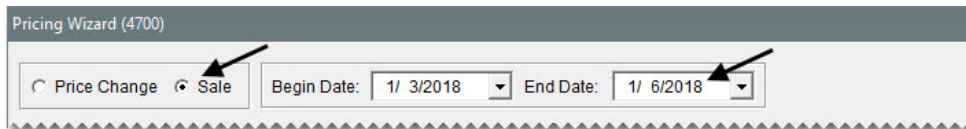
Offer a 10% discount on Michelin passenger tires. The sale begins today and lasts until the end of the week. When you set up the sale, set the ending of the sale prices to 97 cents.

## To set up a sale

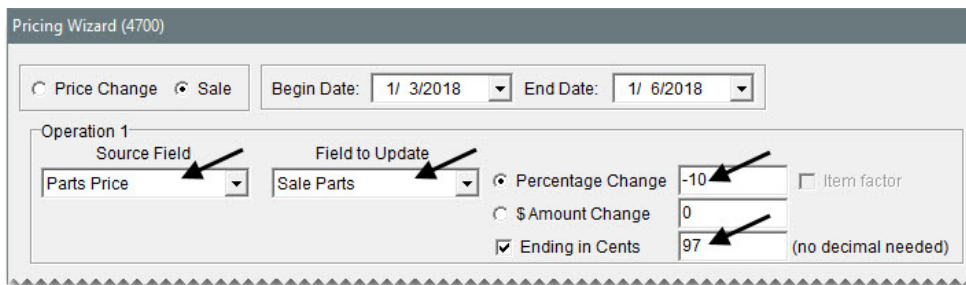
1. From the **Inventory** menu, select **Pricing Wizard**. The Pricing Wizard opens.



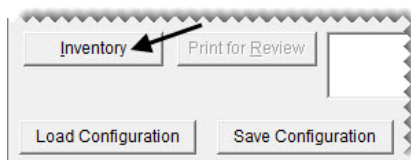
2. Set the dates for the sale.
  - a. Select **Sale**.
  - b. For the ending date, select this Saturday's date from the pop-up calendar.



3. Set the prices for the sale.
  - a. For the **Source Field**, select Parts Price.
  - b. For the **Field to Update**, select Sale Parts.
  - c. Make sure **Percentage Change** is selected, and type **-10**.
  - d. Select the **Ending in Cents** check box, and type **97** in the **(no decimal needed)** field.

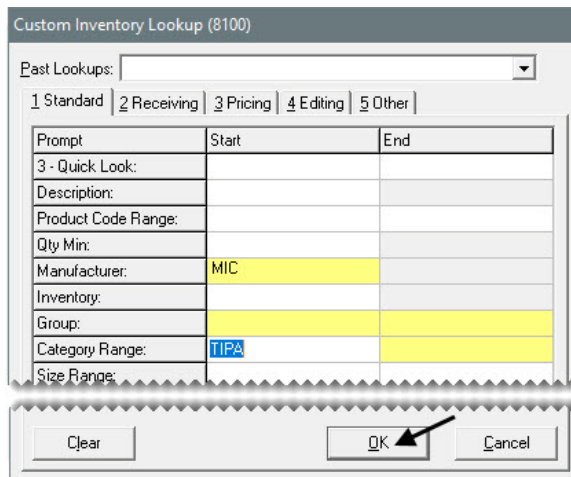


4. Select the items that will be on sale.
  - a. Click **Inventory**. The Custom Inventory Lookup screen appears.

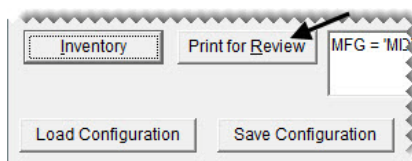


- b. Click the **Manufacturer** row, and press **[F4]**. Then select Michelin from the list that appears.
- c. Click the **Category Range** row, and press **[F4]**. Then select TIPA from the list that appears.

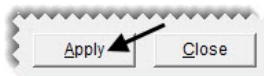
- d. Click **OK** to finish the search. The items are added to the Pricing Wizard.



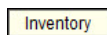
- 5. Review and apply the pending sale prices.
  - a. Click **Print for Review**. The Report Window opens.



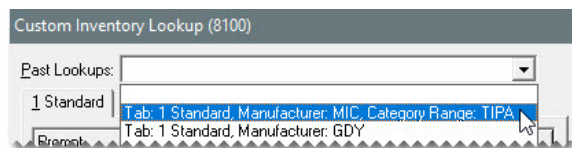
- b. Review the new sale prices. Then close the Report Window.
  - c. Click **Apply**. TireMaster prompts you to confirm the price change.



- d. Click **Yes**.
  - e. Click **OK** to close the completion message and the Pricing Wizard.
- 6. Verify that the selected items have been put on sale.
  - a. Click **Inventory**. The Custom Inventory Lookup screen appears.



- b. Select the lookup for the manufacturer Michelin and category range TIPA from the **Past Lookups** drop-down.



- c. Click **OK**. The Inventory List appears. All of the tires are colored cyan, which means they're currently on sale.



- d. Close the open screens.

## Using a Price Matrix

With a 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.

**Note:** Matrix price changes are calculated with the next cost. If an item doesn't have a next cost, its last cost is used for the calculation instead.

Working with price matrixes includes the following steps:

- ◆ Creating a matrix to define one or more cost ranges and the percentages or dollar amounts by which selling prices will change
- ◆ Assigning a matrix to an individual item or group of items
- ◆ Updating prices by assigning a matrix

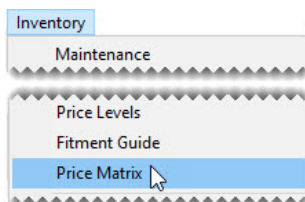
A matrix can be edited, copied or deleted as needed, See ["Working with Price Matrixes" on page 211](#) for more information.

### Walk-Through: Setting Up a Price Matrix

Set up a price matrix that includes three ranges.

#### To set up a price matrix

1. From the **Inventory** menu, select **Price Matrix**. The Price Matrix screen appears with the first matrix on the list selected (unless none have been set up).



2. To clear the current matrix data click **Clear Matrix**.





- For the matrix name, type **Performance FIR**.

A screenshot of a software window showing a text input field labeled 'Matrix Name' containing the text 'Performance FIR'.

- Create three matrix ranges, and define the low and high cost and percentage for each.

**Note:** Prices do not update when there are gaps between matrix ranges. Therefore, when you add the second range and any additional ranges, the amount in the **Low Cost** field needs to match the amount in the **High Cost** field for the previous range.

- For Range 1, type a low cost of **0**, high cost of **100**, and percentage of **35**.
- For Range 2, type a low cost of **100**, high cost of **200**, and percentage of **25**.
- For Range 3, type a low cost of **200**, high cost **300**, and percentage of **15**.

A screenshot of a software window titled 'Matrix Name Performance FIR'. It displays three matrix ranges with the following values:

| Range   | Low Cost | High Cost | Percent | Amount |
|---------|----------|-----------|---------|--------|
| Range 1 | 0        | 100       | 35      |        |
| Range 2 | 100      | 200       | 25      |        |
| Range 3 | 200      | 300       | 15      |        |

- Click **Save Matrix**, and close the price matrix screen.

A screenshot of the bottom of the software window showing three buttons: 'Save Matrix', 'Clear Matrix', and 'Close'. An arrow points to the 'Save Matrix' button.

## Walk-Through: Assigning a Price Matrix to an Item

Assign the price matrix you just created to an item.

### To assign a price matrix

- Click **Inventory**. The Customer Inventory Lookup screen appears.

A screenshot of a button labeled 'Inventory'.

2. Type **189701** in the product code row, and click **OK**.

Custom Inventory Lookup (8100)

Past Lookups: [Dropdown]

1 Standard | 2 Receiving | 3 Pricing | 4 Editing | 5 Other

| Prompt              | Start  | End |
|---------------------|--------|-----|
| 3 - Quick Look:     |        |     |
| Description:        |        |     |
| Product Code Range: | 189701 |     |
| Qty Min:            |        |     |

Clear OK Cancel

3. Select the item and click **OK**.

Inventory List (2000)

| Prod Code | Size           | Description   | Available |
|-----------|----------------|---------------|-----------|
| 189701    | LT215/85R16/10 | HT TRANSFORCE | 4         |

OK Cancel

4. Click the **Qty/Pricing** tab.

Inventory Maintenance (12300)

General Qty/Pricing History Notes

5. Click **Detail/Edit**.

Detail/Edit

6. Select Performance FIR from the **Price Matrix** drop-down.

Site Prices and Quantity (1700)

Description: HT TRANSFORCE : 189701 : LT215/85R16/10

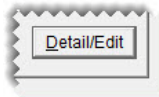
|             |        |               |        |            |          |
|-------------|--------|---------------|--------|------------|----------|
| On Hand:    | 4.0000 | Last FET:     | 0.0000 | Parts:     | 187.2000 |
| Not Priced: | 0.0000 | Next FET:     | 0.0000 | Labor:     | 0.0000   |
| Work Order: | 0.0000 | Price Matrix: | None   | EDL:       | 187.2000 |
| On Order:   | 0.0000 | Relief %:     |        | Flat Rate: | 0.0000   |
| At Recap:   | 0.0000 |               |        |            |          |

Price Matrix dropdown: None, MICHELIN PAX, Performance FIR

7. Click **OK**.

OK Cancel

- Click **Detail/Edit** and look at the parts price (EDL). It has been updated by 25% of the base price.



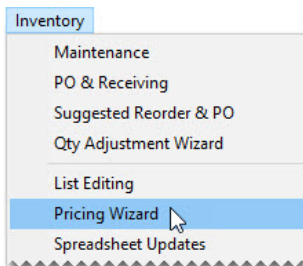
- Close the open screens.

## Walk-Through: Assigning a Matrix to a Group of Items

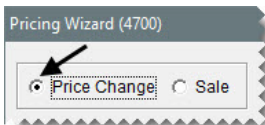
Assign the Firestone Matrix to a group of items. For a group of items, the Pricing Wizard is used to assign the matrix.

### To assign a matrix to a group of items

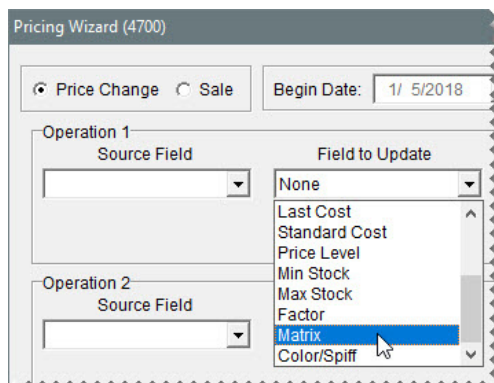
- Select **Pricing Wizard** from the **Inventory** menu. The Pricing Wizard screen appears.



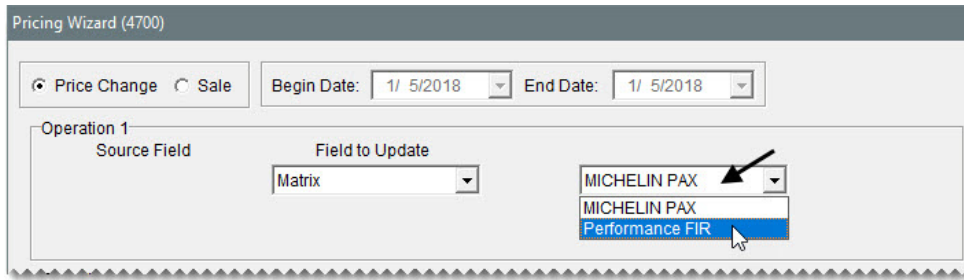
- Make sure **Price Change** is selected.



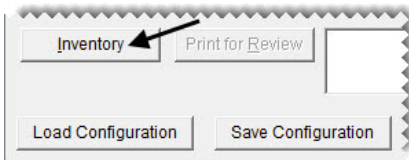
- Select **Matrix** from the **Field to Update** drop-down for the operation being used to update matrixes. A second drop-down that lists the available matrixes appears.



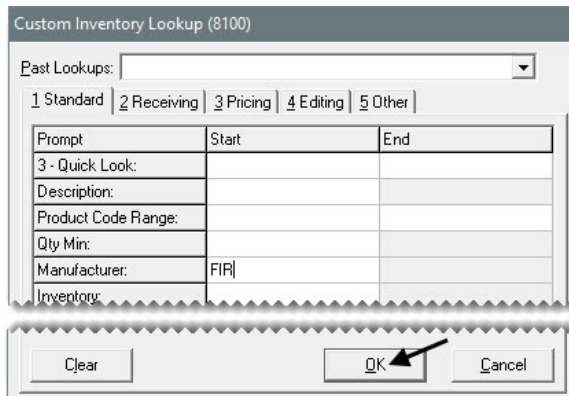
4. Make sure Performance FIR is selected from the second drop-down.



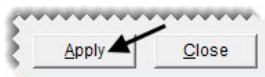
5. Click **Inventory**. The Custom Inventory Lookup screen appears.



6. Click the **Manufacturer** row, and press . Then select Firestone from the list that appears.
7. Click **OK** to finish the search. The items are added to the Pricing Wizard.



8. Click **Apply**. TireMaster prompts you to confirm the price change.



9. Click **Yes**. A confirmation message appears.
10. Click **OK** to close the message and the Pricing Wizard.

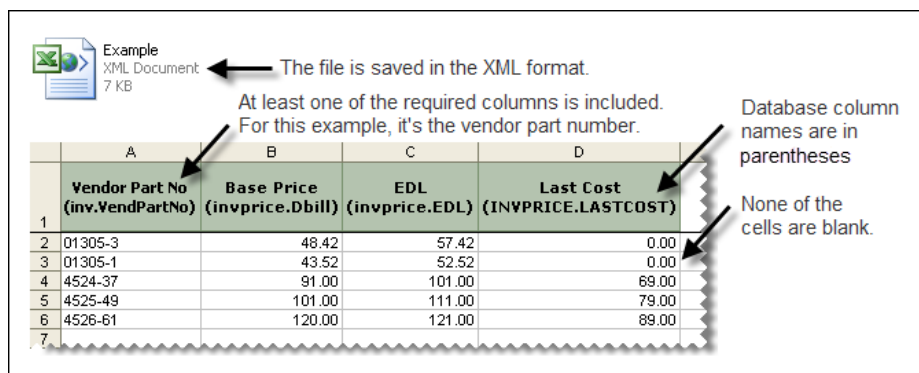
## Updating Prices with XML Spreadsheets

You can update price settings for existing items by importing data from an XML spreadsheet into TireMaster. Updating prices in this manner helps you save time, because information for multiple items can be updated at once.

Spreadsheets used for updating prices need to meet the following requirements:

- ◆ They must be saved in the XML spreadsheet format.
  - Tip:** In Microsoft® Excel®, select **Save As** from the **File** menu. Then select **XML Spreadsheet** from the **Save as Type** drop-down list.
- ◆ Each column heading must include the TireMaster database column name in parentheses. **Example:** (INVPRICE.DBILL).
- ◆ They must have a column for vendor part numbers, product codes, or both.
- ◆ The cells in each column cannot be blank. If there is no value for a cell, type **0**.

Figure 19 shows a spreadsheet that meets the requirements for updating prices in TireMaster.



**Figure 19: Inventory Update Spreadsheet Requirements**

The **Pricing** folder in the TireMaster program directory (**c:\TireMaster\Pricing** or **d:\TireMaster\Pricing**) includes a spreadsheet that you can modify, or you can create your own spreadsheet. Table 3 lists the fields in TireMaster that can be updated with an XML spreadsheet, along with the corresponding database column name.

**Table 3: XML Spreadsheet Column Headings**

| TireMaster Field Name | Database Column Name |  |
|-----------------------|----------------------|--|
| Vendor Part #         | INV.VENDPARTNO       | At least one of these columns is required. |
| Product Code          | INV.INVNO            |  |
| Base Price            | INVPRICE.DBILL       |  |
| Last Cost             | INVPRICE.LASTCOST    |  |
| Labor Price           | INVPRICE.LABOR       |  |
| Everyday Low          | INVPRICE.EDL         |  |
| Price By              | INVPRICE.PRICEBY     |  |
| Factor                | INVPRICE.FACTOR      |  |
| Sale Labor            | INVPRICE.SALE_LABOR  |  |

**Table 3: XML Spreadsheet Column Headings**

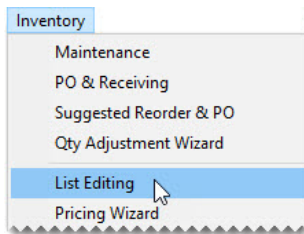
| TireMaster Field Name | Database Column Name  |
|-----------------------|-----------------------|
| Sale Price            | INVPRICE.SALE_PRICE   |
| Sale Begin (date)     | INVPRICE.SALE_BEGIN   |
| Sale End (date)       | INVPRICE.SALE_END     |
| Last FET              | INVPRICE.LASTFETAX    |
| Next FET              | INVPRICE.FETAX        |
| Standard Cost         | INVPRICE.STANDARDCOST |

### Walk-Through: Updating Prices with an XML Spreadsheet

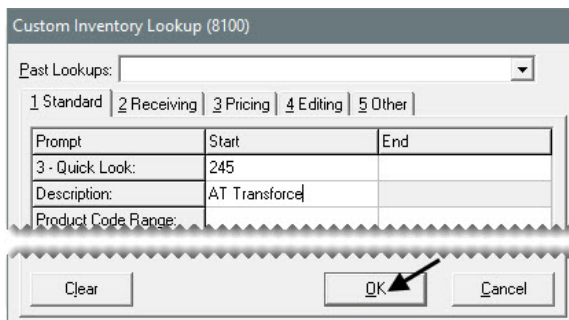
Use an XML spreadsheet to update the cost and price information for a sample of Firestone AT Transforce tires. This update will be based on the items' product codes.

#### To update prices with an XML spreadsheet

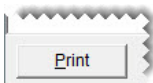
1. Generate a hard copy of the items that will be updated.
  - a. From the **Inventory** menu, select **List Editing**. The Custom Inventory Lookup screen appears.



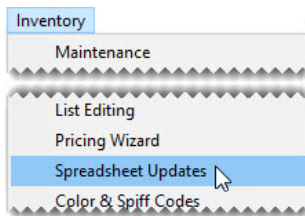
- b. Type **245** in the **Quick Look** row and **AT Transforce** in the **Description** row. Then click **OK**. The Inventory List Editing screen appears.



- c. Click **Print**. The Report Window opens.



- d. Print the report, and close the Inventory List Editing screen.
2. From the **Inventory** menu, select **Spreadsheet Updates**. The Inventory Update from Spreadsheet XML File screen appears.

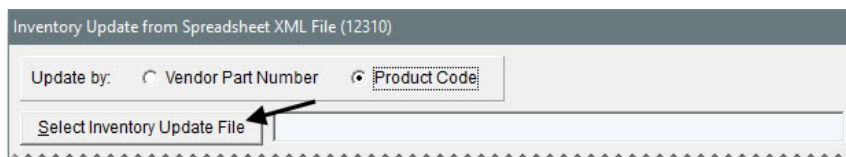


3. Select **Product Code**. TireMaster checks the inventory for any items that have been assigned duplicate product codes.

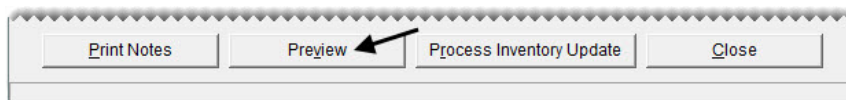


4. If TireMaster detected any duplicate product codes, compare the ones listed on the screen to the product codes on the Inventory List Editing Report.
 

**Note:** Items with duplicate part numbers or product codes will not be updated. Therefore, you might need to modify some product codes before implementing the spreadsheet update.
5. Look up the spreadsheet with the price information:
  - a. Click **Select Inventory Update File**. The Load Inventory Update File screen appears.



- b. Select the file PriceUpdate\_TMClass\_920.xml, and click **Open**.
6. View the pending changes and complete the update.
  - a. Click **Preview**. You might need to scroll down to see the results of the preview.



**Note:** If TireMaster cannot access the data file, make sure the spreadsheet is not open in Microsoft® Excel®.

- b. Click **Process Inventory Update**. A confirmation message appears.



- c. Click **OK**.
7. Close the Inventory Update from Spreadsheet XML File screen.

- 8.** To verify that the prices were updated, display the items on the Inventory List Editing screen again.  
(See steps 1a and 1b.)



# Replenishing Inventory

You can manage inventory replenishment from start to finish with TireMaster's PO System. This chapter includes the following topics:

- ◆ “Reordering Items” on page 131
- ◆ “Receiving Items on a Purchase Order” on page 133
- ◆ “Pricing Items on a Receiving Document” on page 136
- ◆ “Adding Items to a Receiving Document at Point of Sale” on page 138
- ◆ “Returning Items to Vendors” on page 143

## Reordering Items

You can simplify the reordering process by creating a suggested purchase order. When the reordered items are delivered, you can receive and price them.

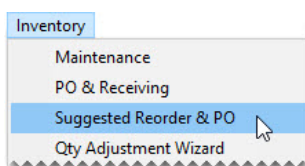
Creating a suggested purchase order includes generating a report that shows the difference between the minimum quantities you've set for your items and the actual quantities you have on hand. Once you've generated the report, you can create a purchase order based on its results.

### Walk-Through: Creating a Suggested Purchase Order

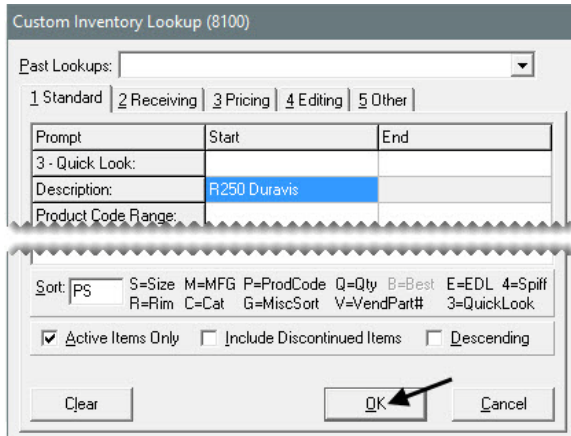
Create a suggested purchase order for Bridgestone R250 Duravis tires. You'll place this order with Parrish Tire.

#### To create a suggested purchase order

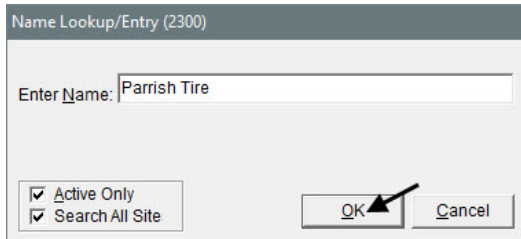
1. From the **Inventory** menu, select **Suggested Reorder & PO**. The Custom Inventory Lookup screen appears.



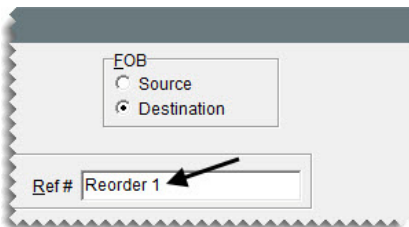
2. Look up all Bridgestone R250 Duravis tires.
  - a. Type **R250 Duravis** in the **Description** row.
  - b. Type **PS** in the **Sort** field to organize items by product code and size.
  - c. Click **OK**. The Report Window opens and displays the Suggested Reorder Report. Items are included on the report when their on-hand quantities fall below their required minimum quantities.



3. Close the Report Window. A confirmation message appears.
4. Click **Yes**. TireMaster prompts you for the name of the vendor you're ordering the tires from.
5. Type **Parrish Tire** and click **OK**. The Purchase Order screen appears.



6. Type the reference number, **Reorder 1**.



7. Click **Order**. The Report Window opens.



8. Print the purchase order, and close the Report Window.

# Receiving Items on a Purchase Order

When an order is delivered, you can receive the items on it. However, being able to price the order depends on if it was delivered with a packing slip or an invoice.

## Walk-Through: Receiving Items on a Purchase Order

The shipment from Parrish Tire arrived with a packing slip. Therefore, you can receive the items, but you can't price the order. (You need a vendor invoice to price orders.) One of the tires was not shipped, so you need to back order it.

The vendor also sent you a set of extra tires that you plan to keep. Because you've never carried the Firestone Firehawk GTA 03 product line, you need to add this item to your inventory when you receive the order.

### To receive items on a purchase order

1. Click **PO List**.

PO List

2. On the **Purchase Orders** tab, select the status **Ordered**.

PO System (16178)

Vendor  ... Find Doc Reset Vendor Filter Off

Purchase Orders | Receiving Documents | Historical Vendor Invoices

Status  
 Open  Ordered  All

Add Edit Delete Receive Print Close

3. Select the purchase order for Parrish Tire, and click **Receive**. The Receiving Documents screen appears.

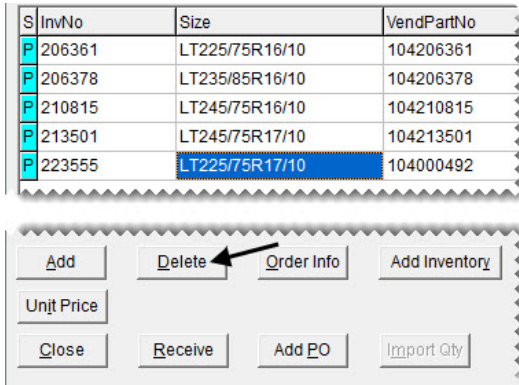
Purchase Orders | Receiving Documents | Historical Vendor Invoices

Open  Ordered  Partial  Fulfilled

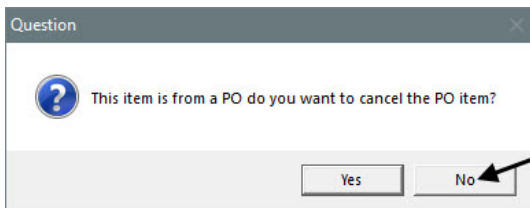
| S | Site | PO Num     | PO Date   | Ref          | Name |
|---|------|------------|-----------|--------------|------|
| 1 | 11   | 01/08/2018 | Reorder 1 | PARRISH TIRE |      |

Add Edit Delete Receive Print Close

4. Back order the tire with product code 223555.
  - a. Select the row for item 223555 and click **Delete**. TireMaster prompts you to confirm the deletion.



- b. Click **Yes**. The following message appears:  
 “This item is from a PO. Do you want to cancel the PO item?”
  - c. To place the item on back order, click **No**.




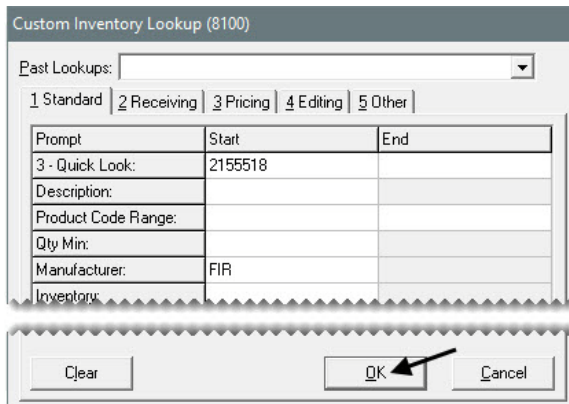
5. Update the quantity of the tire with product code 206361.
  - a. Select the row for the item 206361 and change the quantity to **6**. TireMaster prompts you to confirm the quantity change.

| S | InvNo  | Size           | VendPartNo | Name         | Qty | Price  |
|---|--------|----------------|------------|--------------|-----|--------|
| P | 206361 | LT225/75R16/10 | 104206361  | R250 DURAVIS | 6   | 188.48 |
| P | 206378 | LT235/85R16/10 | 104206378  | R250 DURAVIS | 4   | 204.85 |
| P | 210815 | LT245/75R16/10 | 104210815  | R250 DURAVIS | 4   | 202.83 |
| P | 213501 | LT245/75R17/10 | 104213501  | R250 DURAVIS | 4   | 219.56 |

- b. Click **Yes** to receive the item at a greater quantity. The letter in the **S** (for status) column changes from a **P** (for line from PO) to an **E** (for PO line exception).
6. Receive the GTA 03 tires and add this product line to the inventory.
  - a. Click **Add Inventory**. The Custom Inventory Lookup screen appears.



- b. Look up a similar item, type **2155518** in the **Quick Look** row. Then click the **Manufacturer** row, press , and select Firestone from the list that appears. To finish the search, click **OK**.



Custom Inventory Lookup (8100)

Past Lookups:

1 Standard | 2 Receiving | 3 Pricing | 4 Editing | 5 Other

| Prompt              | Start   | End |
|---------------------|---------|-----|
| 3 - Quick Look:     | 2155518 |     |
| Description:        |         |     |
| Product Code Range: |         |     |
| Qty Min:            |         |     |
| Manufacturer:       | FIR     |     |
| Inventory:          |         |     |

Clear OK Cancel

- c. Select the tire on the Inventory List, and click **OK**.

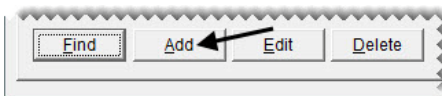


Inventory List (2000)

| Prod Code | Size       | Description           | Available | On Order | Q |
|-----------|------------|-----------------------|-----------|----------|---|
| 138831    | P215/55R18 | AS WIDE OVAL FIREHAWK | 8         | 0        |   |

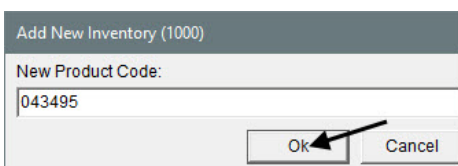
OK Cancel

- d. Click **Add**. TireMaster prompts you for a product code.



Find Add Edit Delete

- e. Type **043495** and click **OK**.



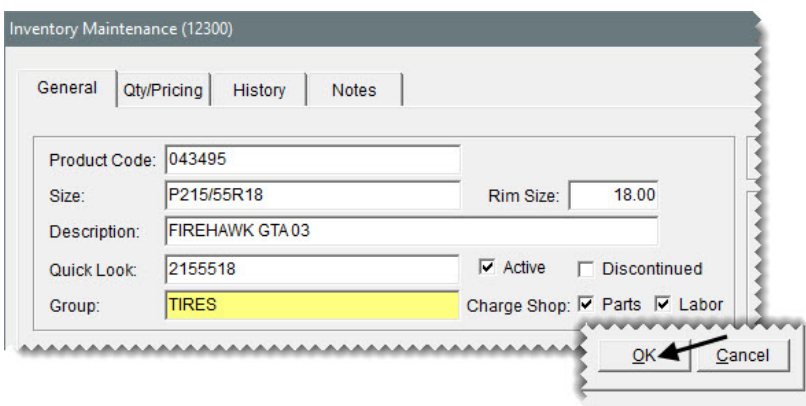
Add New Inventory (1000)

New Product Code:

043495

OK Cancel

- f. Change the description to **Firehawk GTA 03**, and click **OK**. TireMaster prompts you to price the item.



Inventory Maintenance (12300)

General Qty/Pricing History Notes

Product Code: 043495

Size: P215/55R18 Rim Size: 18.00

Description: FIREHAWK GTA 03

Quick Look: 2155518  Active  Discontinued

Group: TIRES Charge Shop:  Parts  Labor

OK Cancel

7. Enter the new item's selling price, received quantity, and cost.
  - a. To price the item, click **Yes**. The Site Prices and Quantity screen appears.
  - b. For the parts price, type **185.00**.

- c. Click **OK**.

- d. Click **OK** again to close the message.
  - e. Click the **General** tab and close the Inventory Maintenance screen. The new item is added to the receiving document.

- f. Change the item's quantity to **4** and the price (your estimated cost) to **120.00**.

| VendPartNo | Name            | Qty | Price  | FETax | Freight | Extended | Core |
|------------|-----------------|-----|--------|-------|---------|----------|------|
| 104206361  | R250 DURAVIS    | 6   | 188.48 | 0.00  | 0.00    | 1130.88  | 0.00 |
| 104206378  | R250 DURAVIS    | 4   | 204.85 | 0.00  | 0.00    | 819.40   | 0.00 |
| 104210815  | R250 DURAVIS    | 4   | 202.83 | 0.00  | 0.00    | 811.32   | 0.00 |
| 104213501  | R250 DURAVIS    | 4   | 219.56 | 0.00  | 0.00    | 878.24   | 0.00 |
|            | FIREHAWK GTA 03 | 4   | 120.00 | 0.00  | 0.00    | 480.00   | 0.00 |

8. Click **Receive**. TireMaster prompts you to price the receiving document.

9. To price the receiving document later, click **No**. The Report Window opens.
10. Print the receiving document and close the Report Window.

## Pricing Items on a Receiving Document

Before you begin selling the items you've received, you should price them. This process updates the last cost and next cost for each of the received items.

## Walk-Through: Pricing Items on a Receiving Document

Parrish Tire sent you an invoice, so you can price the items you received. Because of a \$2 price increase for one of the tires, the receiving needs to be updated.

### To price the items on a receiving document

1. If the PO system screen isn't already open, click **PO List**.

PO List

2. On the **Receiving Documents** tab, make sure the status **Received (Un-Priced)** is selected.

The screenshot shows the 'PO System (16178)' window. At the top, there is a 'Vendor' field with a dropdown arrow, and buttons for 'Find Doc', 'Reset Vendor', and 'Filter Off'. Below this are three tabs: 'Purchase Orders', 'Receiving Documents', and 'Historical Vendor Invoices'. A 'Rev.RD' button is on the right. Under the 'Receiving Documents' tab, there is a 'Status' section with three radio buttons: 'Open', 'Received (Un-Priced)', and 'All'. An arrow points to the 'Received (Un-Priced)' option, which is selected. At the bottom, there are buttons for 'Add', 'Edit', 'Delete', 'Price', 'Print', and 'Close'.

3. Select the receiving document for Parrish Tire, and click **Price**. The Vendor Invoice screen appears.

The screenshot shows the 'PO System (16178)' window. The 'Receiving Documents' tab is active. Below the tabs, there are three checkboxes: 'Open' (checked), 'Received' (unchecked), and 'Priced' (unchecked). Below these is a table with the following data:

| S Site | RDNuM | RD Date    | Ref       | Name         |
|--------|-------|------------|-----------|--------------|
| 1      | 26    | 01/08/2018 | Reorder 1 | PARRISH TIRE |

At the bottom, there are buttons for 'Add', 'Edit', 'Delete', 'Price', 'Print', and 'Close'. An arrow points to the 'Price' button.

4. Click **Edit Prices**. The Vendor Invoice Price Editing screen appears.

The screenshot shows a dialog box titled 'Vendor Invoice Price Editing (16181)'. It contains four buttons: 'Edit Prices', 'Reset', 'Complete', and 'Cancel'. An arrow points to the 'Edit Prices' button.

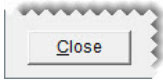
5. Change the price of the item with product code 210815 to **204.83** and press **Enter**.

The screenshot shows the 'Vendor Invoice Price Editing (16181)' window with a table containing the following data:

| Size           | Product Code | VendPartNo | Description     | Qty | Price  |
|----------------|--------------|------------|-----------------|-----|--------|
| LT225/75R16/10 | 206361       | 104206361  | R250 DURAVIS    | 6   | 188.48 |
| LT235/85R16/10 | 206378       | 104206378  | R250 DURAVIS    | 4   | 204.85 |
| LT245/75R16/10 | 210815       | 104210815  | R250 DURAVIS    | 4   | 204.83 |
| LT245/75R17/10 | 213501       | 104213501  | R250 DURAVIS    | 4   | 219.56 |
| P215/55R18     | 043495       |            | FIREHAWK GTA 03 | 4   | 120.00 |

An arrow points to the 'Price' column for the row with product code 210815, which now shows the value 204.83.

- Click **Close**. A message confirming the price override appears.



- Click **Yes** and click **Close** to return to the Vendor Invoice screen.
- Change the discount amount to **0.00**.

 A screenshot of a software window titled "Vendor Invoice (16190)". The window contains several input fields:
 

- VID #: 1 25
- Charge Vendor: PARRISH TIRE
- Date: 1/ 8/2018, Due Date: 2/20/2018
- Ref. #: Reorder 1, Disc. Date: 1/13/2018
- Discount: 0.00 (with an arrow pointing to the field)

- Click **Complete**. The Report Window opens.

 A screenshot of a report window showing four buttons: "Edit Prices", "Reset", "Complete", and "Cancel". An arrow points to the "Complete" button.

- Print the vendor invoice document. Then close the Report Window.
- Leave the PO System screen open.

## Exercise

Start a receiving document for a case of rubber valve stems. A case includes 250 valve stems and costs \$57.50. The vendor for this shipment is Tires & More, and the reference number is 48715. Once you've calculated the per-unit cost, receive and price the items.

# Adding Items to a Receiving Document at Point of Sale

When you enter an item's option cost at point of sale, you can also put the item on a new receiving document or add it to an existing receiving document.

## Walk-Through: Adding Items to a Receiving Document at Point of Sale

Bob from Carl's Auto makes arrangements to buy 16 nonstock Bridgestone M779 tires (size LT215/85R16). Order them from Parrish Tire at a cost of \$168 each, and sell them for \$227. Bob also trades in four tires; you give him \$10 a piece for those.

When Bob pays for the new merchandise, he gives you \$250 cash, puts \$140 on his Bridgestone/Firestone card, and charges the rest to the Carl's Auto in-house charge account. The purchase order number for this invoice is 75821B.



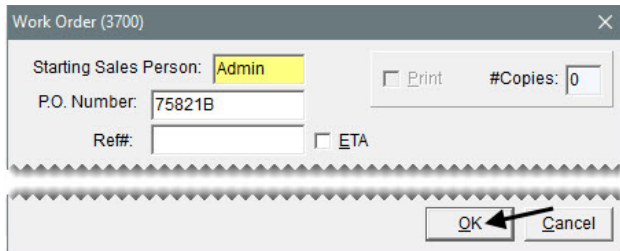
**To add items to a receiving document at point of sale**

1. Start a work order for Carl's Auto.

**Note:** There are no vehicles associated with this customer record.

2. On the Work Order screen, enter a PO number for this sale.

- a. Type **75821B** in the **P.O. Number** field.
- b. Click **OK**. The Invoice Entry screen appears.

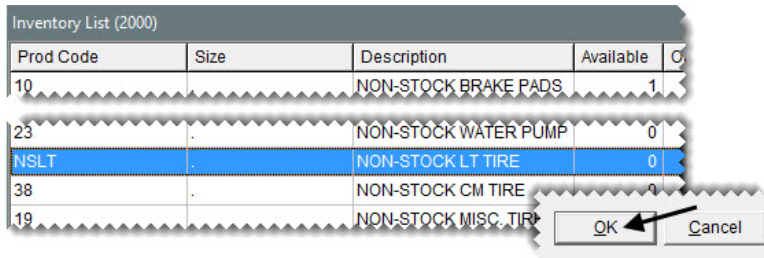


3. Add the nonstock tires to the work order and receiving document.

- a. Type **Non** in the **Size** field, and press **Enter**. The Inventory List appears.

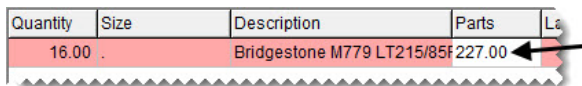


- b. Select the nonstock light truck tire, and click **OK**. The item is added to the work order. The line for this item will be colored pink until you enter its cost.

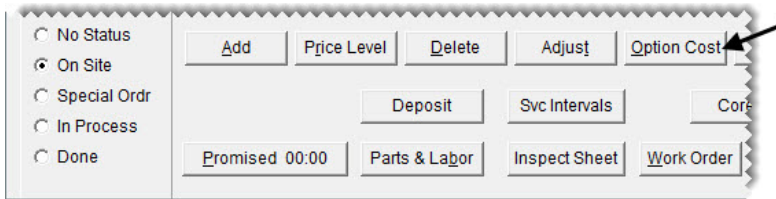


- c. Enter the following information for the nonstock tire:

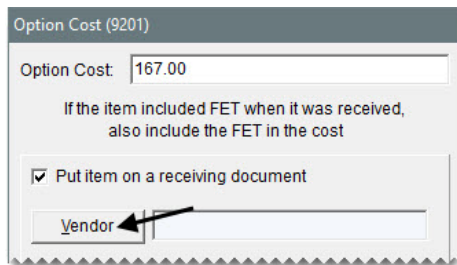
- ◆ For the quantity, type **16**.
- ◆ Change the description to **Bridgestone M779 LT215/85R16**.
- ◆ For the parts price, type **227.00** and press **Enter**.



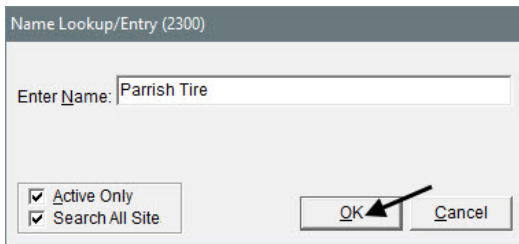
4. Enter the item's cost and add it a receiving document.
  - a. Click **Option Cost**. The Option Cost screen appears.



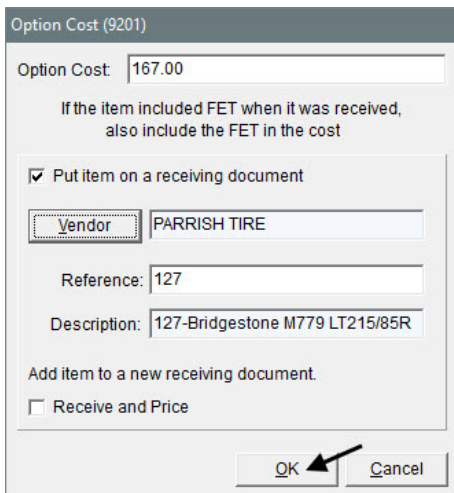
- b. For the item's cost, type **167.00**.
  - c. Make sure the **Put item on a receiving document** check box is selected.
  - d. Click **Vendor**. TireMaster prompts you for the vendor's name.



- e. Type **Parrish Tire** and click **OK**.

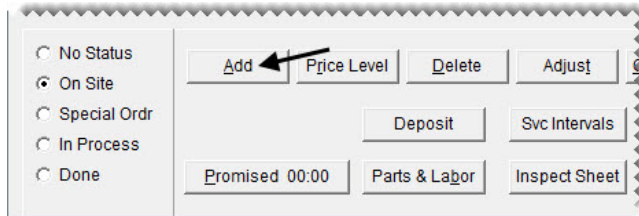


- f. Click **OK** to return to the Invoice Entry screen.



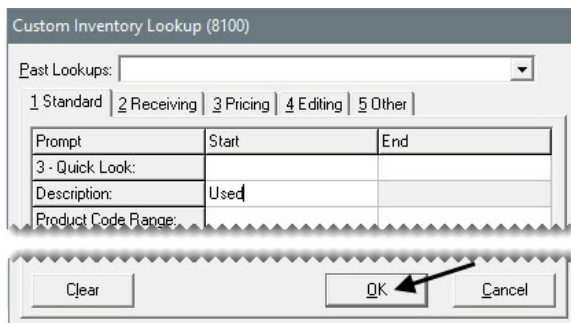
**Note:** The reference and item description reflect the customer's invoice number and will appear on the receiving document unless they are edited.

5. Add the trade-in tires to the work order.
  - a. Click **Add**. The Custom Inventory Lookup screen appears.

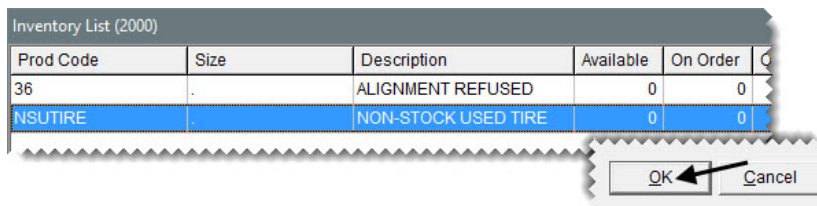


**Note:** If TireMaster prompts you to add a row, click **No**.

- b. Type **used** in the **Description** row, and click **OK**. The Inventory List appears.



- c. Select the nonstock used tire, and click **OK**.



6. Process the trade-in.
  - a. For the quantity of the used tires, type **-4** and press **Enter**. The Customer Sales History screen appears.

| Quantity | Size | Description                | Parts  | Labor | FC |
|----------|------|----------------------------|--------|-------|----|
| 16.00    | .    | Bridgestone M779 LT215/85F | 227.00 | 0.00  |    |
| -4       | .    | NON-STOCK USED TIRE        | 0.00   | 0.00  |    |

- b. Click **Trade-In**.



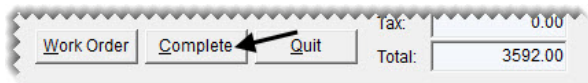
**Note:** Because the tires are being traded, you can disregard the check boxes in the upper-right corner of the screen.

- c. Change the selling price of the tires to **10.00**.

| Quantity | Size | Description                | Parts  | Labor | Fr |
|----------|------|----------------------------|--------|-------|----|
| 16.00    | .    | Bridgestone M779 LT215/85F | 227.00 | 0.00  |    |
| -4.00    | .    | NON-STOCK USED TIRE        | 10.00  | 0.00  |    |

- 7. Complete the invoice.

- a. Click **Complete**. TireMaster prompts you to assign mechanics to the work order.



- b. Click **Yes** to complete the invoice without assigning mechanics. The DOT Information screen appears.
- c. To disregard entering DOT numbers, click **OK**. A confirmation message appears.
- d. Click **Yes**. The Invoice Completion screen appears.

- 8. Enter the payment.

- a. In the **Cash** row, type **250.00** and press **Enter**.
- b. Click the first **Credit/Debit** card row. Then type **140.00** and press **Enter**. The Card Authorization Box appears.

| Pay Type       | Amount |
|----------------|--------|
| Cash           | 250.00 |
| Check          | 0.00   |
| Charge         | 0.00   |
| Credit / Debit | 140.00 |
| Credit / Debit | 0.00   |

- c. To process the credit card, do the following:
  - ◆ For the card type, select the Bridgestone/Firestone (CFNA) card.
  - ◆ For the reference, type last four digits of the card number. For this walk-through, use **9900**.
  - ◆ For the authorization code, type **BSFS001**.

- ◆ Click **OK**.

Card Authorization Box (4000)

Card Type:

- 0 - DEBIT CARD
- A - AMERICAN EXPRESS
- B - BRIDGESTONE/FIREST**
- D - DISCOVER
- M - MASTERCARD

Ref Number: 9900

Card Holder:

Auth. Code: BSFS001

Auto Authorize    CC Setup    **OK**    Cancel

- d. Click the **Charge** row, and press to insert the remaining invoice amount.

Invoice Completion (3900)

Invoice Total: 3592.00

| Pay Type               | Amount         |
|------------------------|----------------|
| Cash                   | 250.00         |
| Check                  | 0.00           |
| <b>Charge</b>          | <b>3202.00</b> |
| 3 - BRIDGESTONE/FIREST | 140.00         |

9. Click **OK**. TireMaster prompts you to complete and print the invoice.

Marketing    **OK**    Cancel

10. Click **Yes**.

11. Print the invoice and close the Report Window.

## Returning Items to Vendors

If you need to send items back to a vendor, you need to perform an inventory return. The inventory-return process includes the following:

- ◆ Creating a negative receiving document, which removes the item from the inventory and records the cost and federal excise tax of the returned item. When you create the negative receiving, you can use the item's system-generated next cost and federal excise tax, or you can use the cost and FET of your choice.
 

**Note:** If you change the cost, FET, or both, the total of the inventory subledgers might not match the balance of the general ledger's inventory account. In such instances, you need to create adjusting entries.
- ◆ Creating a negative vendor charge, which records the credit or reimbursement that will reduce the vendor's balance. TireMaster can create the charge automatically or you can create it manually.
 

**Note:** When the negative vendor charge is created automatically, it posts to the vendor's subledger and includes a reference number such as VID:1-13.

Once the negative vendor charge is created, either automatically or manually, you need to apply it to one or more invoices in the vendor's subledger. (In TireMaster Plus and TireMaster Corporate systems only.)

### Walk-Through: Returning an Item to a Vendor

You need to return a defective Bridgestone Grid Potenza tire (product code 074775) to Parrish Tire. To remove the tire from your inventory, create a negative receiving document. When you complete the receiving, generate a negative vendor charge for the amount automatically calculated by TireMaster.

#### To return an item to a vendor

1. If the PO System screen isn't already open, click **PO List**.

**PO List**

2. Create a receiving document for the vendor.
  - a. Click the **Receiving Documents** tab.
  - b. Click **Add**. The Name Lookup/Entry screen appears.

PO System (16178)

Vendor  ... Find Doc Reset Vendor Filter Off

Purchase Orders Receiving Documents Historical Vendor Invoices

Add Edit Delete Price Print Close

- c. Type **Parrish Tire**, and click **OK**. The Receiving Document screen appears.

Name Lookup/Entry (2300)

Enter Name: Parrish Tire

Active Only  
 Search All Site

OK Cancel

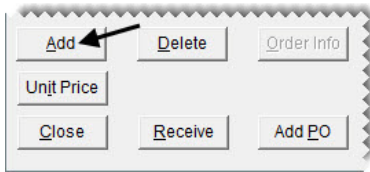
3. Enter the reference number and contact name for this vendor.
  - a. For the contact, type **James Doyle**.
  - b. For the reference number, type **BS-R0091**.

Shipped Via  FOB  
 Source  
 Destination

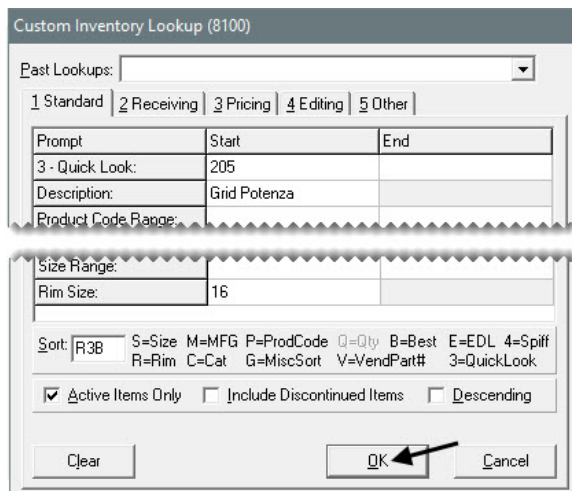
Tracking #

Contact James Doyle Ref# BS-R0091

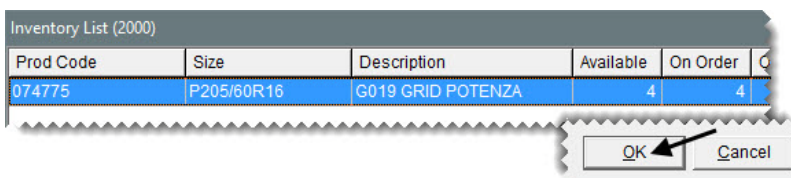
4. Add the returned item to the receiving document.
  - a. Click **Add**. The Custom Inventory Lookup screen appears.



- b. Type **205** in the **Quick Look** row, **Grid Potenza** in the **Description** row, and **16** in the **Rim Size** row. Then click **OK**. The Inventory List appears with the matching tire (product code 074775) selected.



- c. Click **OK**. The Receiving Document screen appears.



- d. Change the quantity to **-1** and press **Enter**. The **Price** and **FETax** fields turn green, and the **Freight** field is disabled.

| Name              | Qty | Price | FETax | Freight | Extended | Core |
|-------------------|-----|-------|-------|---------|----------|------|
| G019 GRID POTENZA | -1  | 0.00  | 0.00  | 0.00    | 0.00     | 0.00 |

5. Complete the receiving.
  - a. Click **Receive**. TireMaster prompts you to price the receiving document.



- b. Click **Yes**. The Vendor Invoice screen appears.

- c. Click **Complete**. The Create Correcting VC screen appears.

**Note:** Changing options in the **Payment** area does not affect how the returned item posts to the general ledger.

6. Create the vendor charge for the return.
  - a. Make sure **Create VC with system generated amount** is selected.
  - b. For the vendor charge option, make sure **Create and process a negative Vendor Charge when the VID is processed** is selected.
  - c. Click **OK**. The Report Window opens.

7. Print the vendor invoice document and close the Report Window.
8. Close the PO System screen.



# Inventory Counts

Taking inventory helps you ensure that the number of items you have on hand matches the number of items in the database. Conducting a physical count includes generating a list of the items you'll count, actually counting the items, and adjusting quantities if there is a difference between the counted quantities and the number of items in TireMaster. This chapter includes the following topics:

- ◆ “Generating Counting Decks” on page 147
- ◆ “Taking a Physical Count” on page 148
- ◆ “Adjusting Inventory Quantities” on page 149
- ◆ “Mobile Inventory Manager” on page 151

## Generating Counting Decks

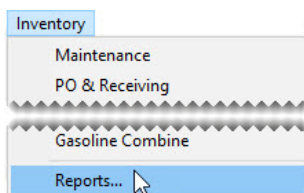
You can generate a list of the items you want to count with your TireMaster system. When you generate a counting deck, you can print one that includes on-hand quantities or one that does not.

### Walk-Through: Generating a List of Items

Generate two copies of the counting deck for a sample of Bridgestone tires. One of the counting decks will include on-hand quantities and the other will not.

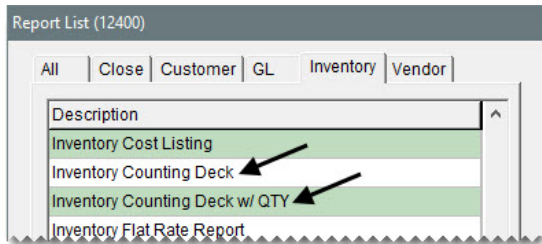
#### To generate a list of items

1. From the **Inventory** menu, select **Reports**. The Reports List appears.

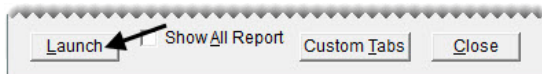



2. Select the report you want to print.
  - ◆ To include quantities on the list, select **Inventory Counting Deck w/PTY**.

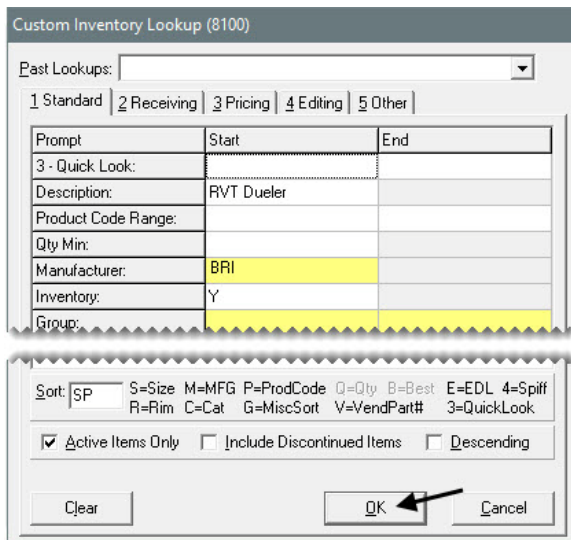
- ◆ To exclude quantities from the list, select **Inventory Counting Deck**.



3. Click **Launch**. The Custom Inventory Lookup screen appears.



4. Look up the items you want to count.
  - a. To narrow the search down to Bridgestone RVT Dueler tires, type **RVT Dueler** in the **Description** row. Then click the **Manufacturer**, press , and select Bridgestone from the list that appears.
  - b. Type the letter **Y** in the **Inventory** field to ensure only inventoriable items are included.
  - c. To sort the items by size and then product code, type **SP** in the **Sort** field.
  - d. Click **OK**. The Report Window opens.



5. Print the report. Then close the Report Window.
6. To generate the second list of items, repeat steps 1 through 5.

## Taking a Physical Count

The second part of taking inventory is counting the items to see how many you actually have. When you take a physical count, follow these guidelines:

1. For each item on the counting deck, count the number of units and write down the actual quantity.

**Note:** The actual count includes items on work order (both mounted and not mounted) and items not on work order. These items can be either in the shop or at another location. If an item is still in the shop but has already been paid for, do not include it in the physical count.

**Tip:** If you included quantities on the counting deck, remember that the number in the **On W/O** column is included in the **Quantity** column.

- On the counting deck, circle any items whose system quantity does not match your count. You need to make a quantity adjustment for these items before you resume business.

## Adjusting Inventory Quantities

If the number of items you count doesn't match the number of items in your TireMaster system, you need to adjust your inventory quantities.

**Warning:** Do not use the Inventory Qty Adjustment Wizard to enter startup quantities, return items to vendors, or correct purchase orders. Doing so permanently invalidates the system-calculated cost for each item.

### Walk-Through: Adjusting Inventory Quantities

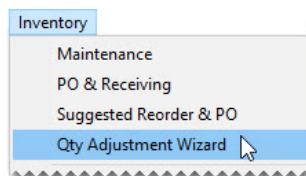
The counters found discrepancies between the system quantities and actual quantities for the following items:

- There are 3 Bridgestone RVT Dueler tires (product code 075778).
- There are 5 Bridgestone RVT Dueler tires (product code 127441).

Adjust the quantities of the two items listed above.

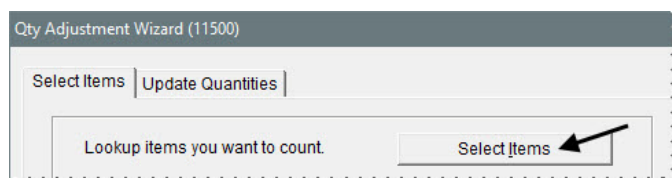
### To adjust inventory quantities

- From the **Inventory** menu, select **Qty Adjustment Wizard**. The Qty Adjustment Wizard screen appears.

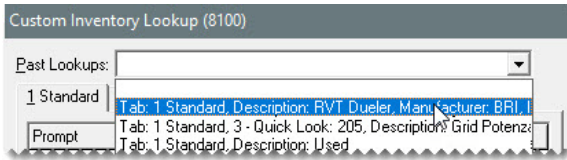


**Note:** Inventory quantities must be adjusted after taking the physical count but before you receive and sell items. Otherwise the adjustment will not correct your on-hand quantities.

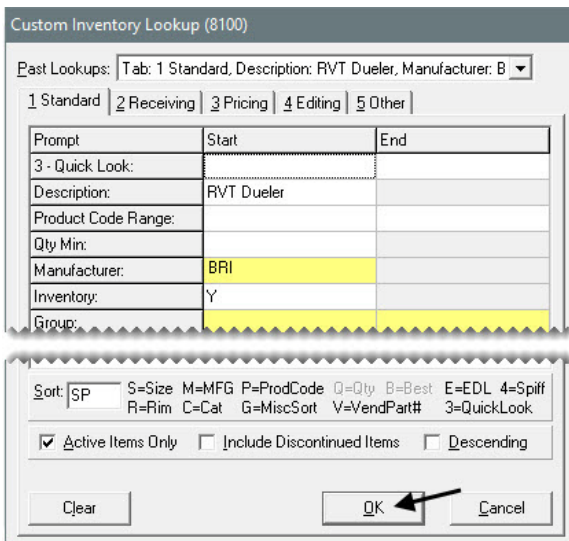
- Look up the items you need to update, with the *same* parameters used for the counting deck.
  - Click **Select Items**. The Custom Inventory Lookup screen appears.



- b. From the **Past Lookups** drop-down, select the parameters that match the search used for the counting deck (Description: RVT Dueler, Manufacturer: BRI, and Inventory: Y).



- c. To sort the counting decks by size and then product code, type **SP** in the **Sort** field.
- d. Click **OK**. The number of retrieved items is displayed on the **Select Items** tab.



- 3. Click **Next** to move to the **Update Quantities** tab.



- 4. Update the counts with the actual quantities on hand.
  - a. In the row for the tire with product code 075778, type the number **3** in the **Actual Count** column and press **Enter**. The row turns blue.

**Note:** Do not type in the difference between the system-generated count and the actual count. If an item's actual count needs to be adjusted to zero, type a **0**.

- b. In the row for the tire with product code 127441, type the number **5** in the **Actual Count** column and press **Enter**. The row turns blue.

Qty Adjustment Wizard (11500)

Select Items | Update Quantities | Import

| ProdCode | Size           | Description | Actual Count |
|----------|----------------|-------------|--------------|
| 204780   | LT265/75R16/10 | RVT DUELER  | 0.0000       |
| 075778   | P235/70R16     | RVT DUELER  | 3.0000       |
| 127424   | P235/70R17XL   | RVT DUELER  | 0.0000       |
| 075710   | P245/75R16     | RVT DUELER  | 0.0000       |
| 127458   | P255/65R17     | RVT DUELER  | 0.0000       |
| 075812   | P255/70R16     | RVT DUELER  | 0.0000       |
| 127441   | P255/70R17     | RVT DUELER  | 5.0000       |
| 017783   | P265/75R16     | RVT DUELER  | 0.0000       |
| 075727   | P265/75R16     | RVT DUELER  | 0.0000       |

5. Compare the entries on the screen to the counting deck to ensure that you've used the correct counts for the items that need to be adjusted.
6. Click **Finish**. The Report Window opens.



7. Print the report, and close the Report Window. A confirmation message appears.
8. Click **Yes**.

**Note:** Once an adjustment is completed, you can view adjustment details in the subledger for the ZZ-Inventory Quantity Adjustment vendor.

## Mobile Inventory Manager

The Mobile Inventory Manager (also referred to as the Bar Code Utility) is an application that you can integrate with your TireMaster system to simplify quantity adjustments. Using the Mobile Inventory Manager eliminates the first two steps of the inventory quantity adjustment process (looking up the items you will count and printing counting decks).

With this application, you record your inventory counts with a device such as a handheld computer or a bar code scanner (such as the one pictured on the right, which is available from ASA). Then you transfer the physical count information from the device to your TireMaster server (or a workstation that is allowed to update the TireMaster database).

When the transfer is complete, import the counts into the Quantity Adjustment Wizard (Figure 20), select the items that need to be corrected, and complete the adjustment.

In addition to quantity adjustments, the Mobile Inventory Manager can also be used to do the following:

- ◆ Import the quantities of delivered items into receiving documents.



- ◆ Assign bar code numbers to items in your inventory.
- ◆ Import bar codes (issued by a chain or franchise) into TireMaster



**Figure 20:** Bar Code Utility Import Button for the Quantity Adjust Wizard

# Accounts Receivable

With the accounts receivable component in TireMaster, you can manage activity for your customer accounts. This chapter includes the following topics:

- ◆ “Receiving Customer Payments” on page 153
- ◆ “Recording Payments from Credit Card Companies” on page 155
- ◆ “Issuing Credit Memos” on page 157
- ◆ “Generating Customer Statements” on page 159
- ◆ “Writing Off Bad Debt” on page 161

## Receiving Customer Payments

An ROA (received on account) is a payment you receive from a customer. Because TireMaster has an open-item accounts receivable ledger, you can define the invoices to which a payment will be applied. You can apply a payment to a customer’s subledger account when you receive it or wait until later to apply the payment. You can also define whether payments should be applied to oldest invoices first.

**Note:** In TireMaster Plus and TireMaster Corporate systems, ROAs decrease your accounts receivable balance and increase your cash balance.

### Walk-Through: Receiving a Customer Payment

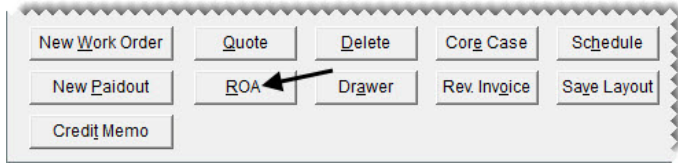
Carl’s Auto sends you a \$1000 check (number 1255). Create an ROA and apply the check toward the customer’s balance.

#### To create an ROA

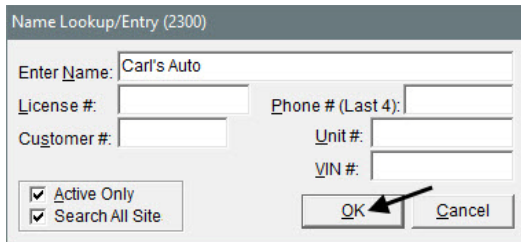
1. Click **Invoicing**.

Invoicing

2. Click **ROA**. TireMaster prompts you for the customer's name.



3. Type **Carl's Auto**, and click **OK**. The Customer Maintenance screen appears.

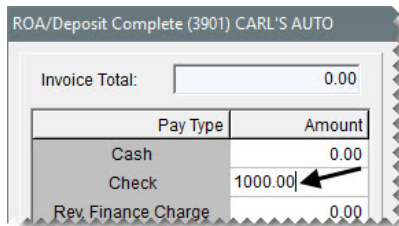


4. Click **OK** to continue.

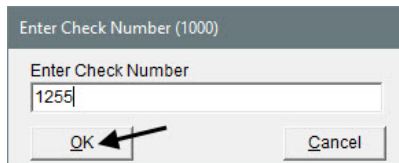


5. Enter the payment.

- a. Type **1000.00** in the **Check** row, and press **Enter**. TireMaster prompts you for a check number.



- b. For the check number type, **1255** and click **OK**.



6. Complete and apply the payment.

- a. Make sure the **Apply ROA** and **Flag Old Invoices** check boxes are selected.



- b. Click **OK**. TireMaster prompts you to complete and print the ROA.

7. Click **Yes**. The Open Item Ledger screen appears with the payment marked to be applied to an invoice.
8. Click **OK**. TireMaster prompts you to save your changes.

| Site | Mod | Invoice | Ref # | Amount   | UnApplied | DueDate    | DiscAmt | Pay      | Apply | D |
|------|-----|---------|-------|----------|-----------|------------|---------|----------|-------|---|
| 1    | RO  | 101     |       | -1000.00 | 0.00      | 01/08/2018 | 0.00    | -1000.00 | A     | 0 |
| 1    |     | 127     |       | 3202.00  | 2202.00   | 06/05/2015 | 0.00    | 1000.00  | A     | 0 |

9. Click **Yes**. TireMaster prompts you to apply the items.
10. Click **Yes**. The Report Window opens.
11. Print the ROA and close the Report Window.

## Exercise

Process a \$1,000 check payment from Garner County Sheriff's Office.

# Recording Payments from Credit Card Companies

A credit-card company pays you by making a direct deposit into your bank account. To enter a payment from a credit card company in TireMaster, create an ROA. Whether the ROA is for the full amount charged by customers depends on when the credit card company collects merchant fees from you:

- ◆ If the fees will be withdrawn from your checking account *after* you receive the payment, the ROA will be the full amount charged by customers. In this scenario, you need to record the merchant fees in the check register for your checking account.
- ◆ If the credit card company deducted the merchant fees *before* sending you the payment, the amount of the ROA will be the difference between the amount charged by customers and the merchant fees. In this scenario, the merchant fees are entered as a discount in the credit-card company's open-item ledger.

## Walk-Through: Recording a Credit Card Company's Payment

VISA makes a direct deposit into your checking account for \$722.32. You'll record the merchant fees for this credit card company later.

### To record a payment from a credit card company

1. Click **Invoicing**. The Open Work Order List appears.

Invoicing

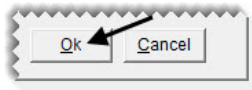
2. Create an ROA to enter the payment received from the credit card company.
  - a. Click **ROA**. TireMaster prompts you for the credit card company's name.



- b. Type **ZZ-VISA** and click **OK**. The Customer Maintenance screen appears.

A screenshot of the Name Lookup/Entry (2300) dialog box. It contains fields for Enter Name (ZZ-Visa), License #, Customer #, Phone # (Last 4), Unit #, and VIN #. There are checkboxes for Active Only and Search All Site. The OK button is highlighted with an arrow.

- c. Click **OK** to continue.



- d. Type the direct deposit amount of **722.32** in the **Check** field and press **Enter**. TireMaster prompts you for a check number.

A screenshot of the ROA/Deposit Complete (3901) ZZ-VISA/MASTERCARD dialog box. It shows the Invoice Total as 0.00. Below is a table with Pay Type and Amount columns:

| Pay Type            | Amount |
|---------------------|--------|
| Cash                | 0.00   |
| Check               | 722.32 |
| Rev. Finance Charge | 0.00   |

An arrow points to the 722.32 value in the Check row.

- e. Because there is no check, type **Direct Deposit** and click **OK**.

- f. Make sure the **Direct Deposit** and **Apply ROA** check boxes are *selected* and the **Flag Old Invoices** check box is *clear*.

- g. Click **OK**. TireMaster prompts you to complete the ROA.

- h. Click **Yes**. The Open Item Ledger screen appears.

3. Apply the payment to the credit card company's balance.

- a. Type the letter in **A** in the **Apply** column for the invoice that you want to apply the payment to. Then click **OK**. TireMaster prompts you to save your changes.

| Site | Mod | Invoice | Ref#   | Amount  | UnApplied | DueDate    | DiscAmt | Pay     | Apply | D |
|------|-----|---------|--------|---------|-----------|------------|---------|---------|-------|---|
| 1    | CC  | 101     | 1234   | 722.32  | 0.00      | 01/25/2015 | 0.00    | 722.32  | A     | 1 |
| 1    | CC  | 102     | BK1001 | 834.03  | 834.03    | 03/03/2018 | 0.00    | 0.00    |       | 0 |
| 1    | CC  | 103     | 1234   | 244.58  | 244.58    | 03/03/2018 | 0.00    | 0.00    |       | 0 |
| 1    | RO  | 108     |        | -722.32 | 0.00      | 02/01/2018 | 0.00    | -722.32 | A     | 0 |

- b. Click **Yes**. Then click **Yes** again to apply the payment.

## Issuing Credit Memos

Occasionally, it may be necessary to issue credit memo to a customer who has provided a service to your company but would prefer an in-store credit instead of a direct payment. For example, your computer technician repaired a workstation and wants to be paid with an in store credit. Issuing a credit memo allows you to credit the customer's account and record the expense in the GL.

## Walk-Through: Issuing a Credit Memo

Treasure Valley PC Repair performed work on your computer and instead of receiving payment for the invoice of \$89.00 they would like a credit on their charge account.

### To Issue a credit memo

1. Click **Invoicing**. The Open Work Order List appears.
2. Click **Credit Memo**. TireMaster prompts you for the customer's name.



**Note:** You can also create a credit memo from the Customer Maintenance screen. To begin, look up the customer, click the **Ledger/History** tab, and click **Credit Memo**.

3. Type **Treasure Valley PC Repair** and click **OK**. The Customer Balance Adjustment screen appears.

A screenshot of the Name Lookup/Entry (2300) dialog box. The 'Enter Name' field contains 'Treasure Valley PC Repair'. There are fields for License #, Phone # (Last 4), Customer #, Unit #, and VIN #. There are checkboxes for 'Active Only' and 'Search All Site'. The 'OK' button is highlighted with an arrow.

4. Enter the credit memo.
  - a. Type **WS2 Repair** in the **Reference** field.
  - b. Click the field for the major account, and press  $\uparrow$ . Then select the repair expense account from the list that appears.

A screenshot of the Customer Balance Adjustment (3801) screen. The title is 'TREASURE VALLEY PC REPAIR'. Fields include Date: 1/ 8/2018, Due Date: 2/ 5/2018, Disc Date: 1/18/2018, and Reference: WS2 Repair. Below is an 'Offsets' table with columns Site#, Dept#, Major, Minor, Descr, Amount, and CL. The first row is highlighted in green: Site# 1, Dept# 1, Major 0, Minor 0, Descr Credit Memo, Amount 0.00, CL 1. An arrow points to the Major field.

| Site# | Dept# | Major | Minor | Descr       | Amount | CL |
|-------|-------|-------|-------|-------------|--------|----|
| 1     | 1     | 0     | 0     | Credit Memo | 0.00   | 1  |

- c. Select **6350-0 Repair Expense** and click **OK**.
- d. Type **-89.00**.
- e. Make sure the amount in the **Disc \$** field is 0.00.

- Click **OK**. A confirmation message appears.

Customer Balance Adjustment (3801)

TREASURE VALLEY PC REPAIR

Date: 1/ 8/2018      Due Date: 2/ 5/2018  
 Disc Date: 1/18/2018      Reference: WS2 Repair

Offsets:

| Site# | Dept# | Major | Minor | Descr       | Amount | CL |
|-------|-------|-------|-------|-------------|--------|----|
| 1     | 1     | 6350  | 0     | Credit Memo | -89.00 | 1  |

Disc \$: 0.00      Total: -89.00

\*\*\* Credit Memo \*\*\*

OK      Cancel

- Click **Yes**. The Report Window appears.
- Print the credit memo and close the Report Window. The Open Item Ledger screen appears. It lists the credit which can be applied to balances incurred by the customer. Credits resulting from credit memos are applied in the same manner as ROAs.
- Close the open screens.

## Generating Customer Statements

If you have customers with charge accounts, you need to send them regular statements so they know their account balances. During the going-online process, you'll set a starting date for statement cutoffs. Because the date will change in monthly increments, your statement cutoff should occur on the same date each month.

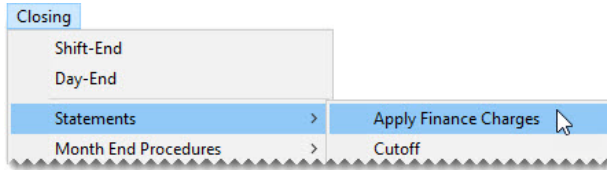
### Walk-Through: Generating Customer Statements

To prepare for the statement cutoff, apply finance charges to all outstanding customer balances. Then run the statement cutoff to age your customers' balances. (If you want to review the balances before the cutoff, generate a Customer Balance Report.) Once you've applied the finance charges and run the cutoff, you can print the statements.

## To generate customer statements

### 1. Apply finance charges.

- a. From the **Closing** menu, select **Statements**, and then **Apply Finance Charges**. The Report Window opens and displays the Finance Charge Edit Report.



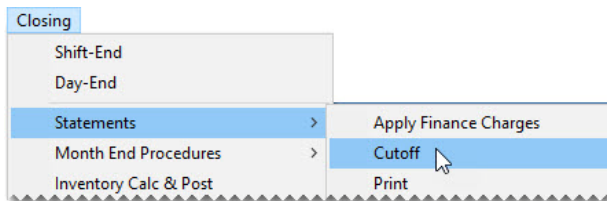
- b. Review the charges and print the report.

**Note:** Finance charges can be calculated based on invoice age. With the system control **Finance Chrg Later than Day**, you can define the age at which to begin calculating finance charges. For example, if the control is set to **90**, finance changes are calculated only for invoices older than 90 days. When the control is set to 0, it's disabled. **Finance Chrg Later than Day** is on the **Customer** tab on the System Controls screen.

- c. Click **Close**. TireMaster prompts you to post the charges.
- d. Click **Yes**. A confirmation message appears.
- e. Click **OK**.

### 2. Cut off the customer statements.

- a. From the **Closing** menu, select **Statements**, and then **Cutoff**. TireMaster prompts you to print an unapplied credit report.

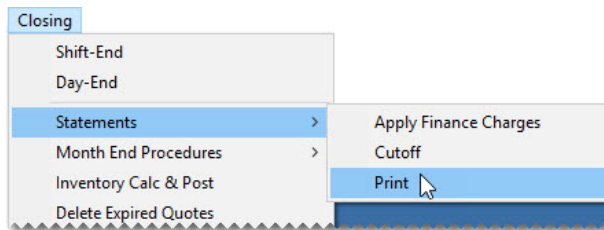


- b. Click **Yes**. The Report Window opens and displays the UnApplied Credit Report.
- c. Review the report.

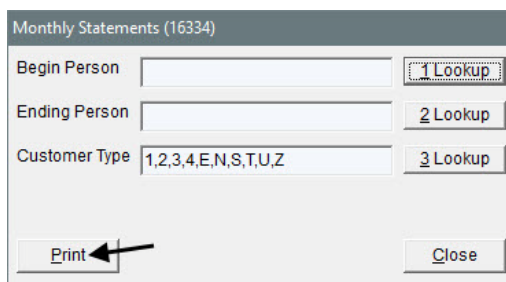
**Note:** If the report lists any unapplied credits, close the Report Window, and click **No** when TireMaster prompts you to perform the statement cutoff. Then apply the credits to the appropriate customer balances, if possible.

- d. Click **Close**. TireMaster prompts you to perform a statement cutoff.
- e. Click **Yes**. A confirmation message appears.
- f. Click **OK**.

3. Print the statements.
  - a. From the **Closing** menu, select **Statements**, and then **Print**. The Monthly Statements screen appears.



- b. To print all customer statements, leave customer range fields blank and click **Print**. The Report Window appears.



**Note:** This step can be performed any time after the current statement cutoff and before the next statement cutoff.

- c. Click the arrow buttons to review statements. Then close the Report Window. In a live setting, you can click **Print** to generate hard copies of the statements.



## Writing Off Bad Debt

When you no longer receive payments from customers with outstanding balances, you might decide to write off the bad debt. You can remove a customer's balance from TireMaster by creating a negative accounts-receivable journal entry, and applying it to the customer's balance.

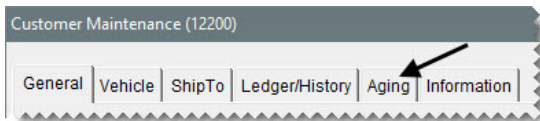
**Note:** In TireMaster Point of Sale systems, the process for writing off bad debt can also be used to charge customers fees when they pay you with nonsufficient funds (NSF) checks.

### Walk-Through: Writing Off Bad Debt

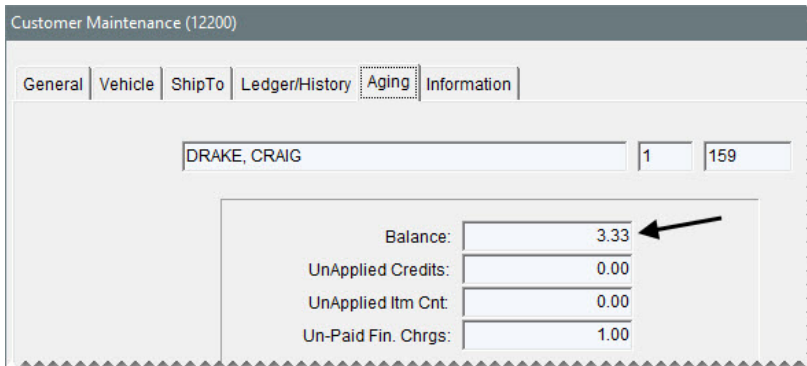
Despite repeated collection attempts, Craig Drake still owes you money. Therefore, you've decided to write off his bad debt. Once you've made the entry for writing off this customer's bad debt, update the color coding and comments in his customer record.

**To write off a customer's bad debt**

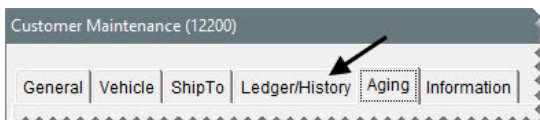
1. Look up the customer record for Craig Drake.
2. Identify the amount you need to write off.
  - a. On the Customer Maintenance screen, click the **Aging** tab.



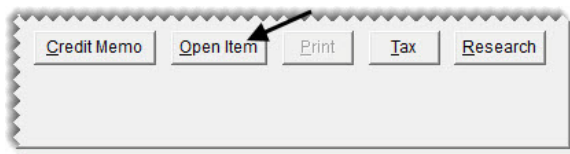
- b. Write down the amount listed in the **Balance** field.



3. Create an entry for the bad debt.
  - a. Click the **Ledger/History** tab.



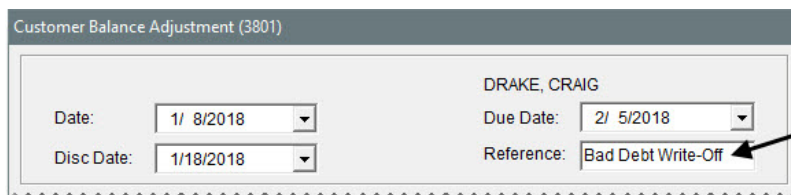
- b. Click **Open Item**. The Open Item Ledger screen appears.



- c. Click **AR Journal Entry**. The Customer Balance Adjustment screen appears.



- d. For the reference number, type **Bad Debt Write-Off**.

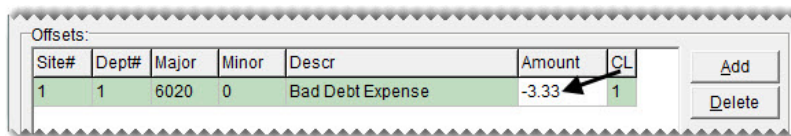




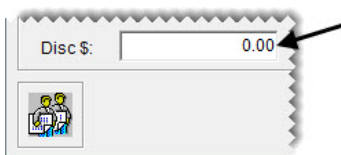
- e. To make the make the offsetting entry, do the following:
  - ♦ Click **Add**. A journal-entry line appears in the **Offsets** area.



- ♦ Click the **Major** column, and press . Then select account 6020–0 Bad Debt Expense, and click **OK**.
- ♦ For the description, type **Bad Debt Expense**.
- ♦ For the amount, type **-3.33**.



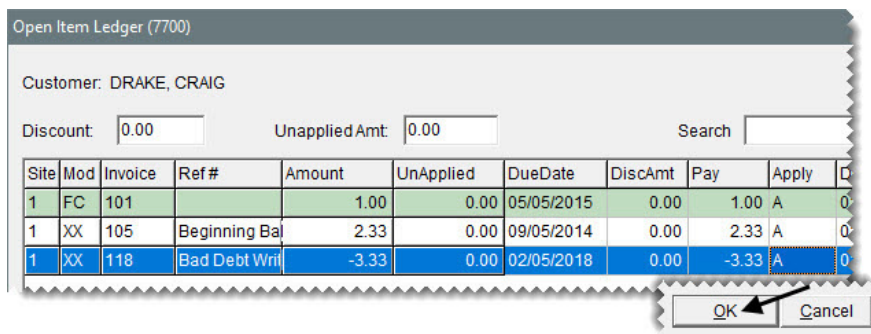
- ♦ Change the amount of the discount to **0.00**.



4. Complete and apply the adjustment.
  - a. Click **OK**. TireMaster prompts you to complete the adjustment.



- b. Click **Yes**. The Open Item Ledger screen appears.
  - c. For all of the rows, type the letter **A** in the **Apply** column.
  - d. Click **OK**. TireMaster prompts you to save your changes.



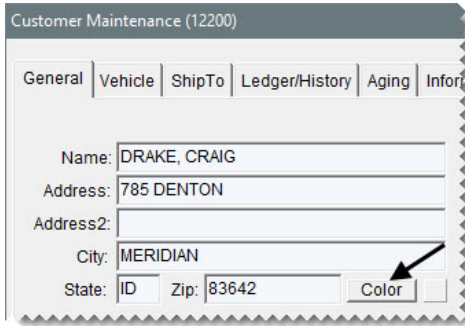
- e. Click **Yes**. TireMaster prompts you to apply the items.
  - f. Click **Yes**.

5. Assign the bad-debt color code to the customer's record.

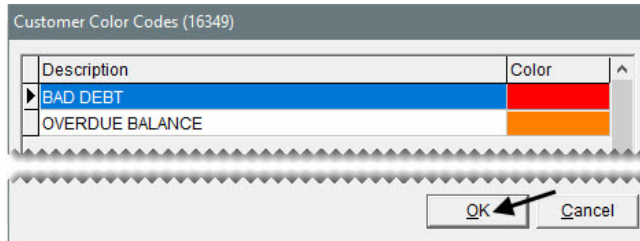
- a. Click the **General** tab.



- b. Click **Color**. The Customer Color Codes screen appears.



- c. Select the color code for bad debt, and click **OK**. The customer's name is highlighted in red.



6. Include a note about the write-off in the customer's record.

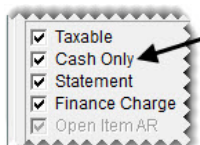
- a. Click **Edit**.



- b. Type **Bad debt write-off: [the current month and year]** in the **Comments** field.



7. To revoke the customer's charge payment privileges, select the **Cash Only** check box.



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



9. Close the Customer Maintenance screen.



# Special Sales & Vendor Credits

For some sales, you're eligible to receive credits from your vendors. These transactions include National Account, Government Support, and Adjustment sales. Similarly, you can also collect vendor credits for core charges after selling parts to your customers. This chapter includes the following topics:

- ◆ [“Reconciliation Codes” on page 167](#)
- ◆ [“National-Account & Government-Support Customers” on page 171](#)
- ◆ [“Performing National-Account Sales” on page 174](#)
- ◆ [“Performing Government-Support Sales” on page 176](#)
- ◆ [“Creating Adjustment Invoices” on page 177](#)
- ◆ [“Reconciling Vendor Credits” on page 182](#)
- ◆ [“Processing Core Credits” on page 184](#)

## Reconciliation Codes

Reconciliation codes make it possible for you to track the credits you expect to receive from vendors for national-account, government-support, and adjustment sales. In TireMaster Plus and TireMaster Corporate systems, they also dictate how these types of sales post to the general ledger.

## Setting Up Reconciliation Codes

You need to create reconciliation codes for each vendor with whom you do national-account, government-support, and adjustment sales. These reconciliation codes can then be assigned to items and the customers who've established special purchasing agreements with these vendors.

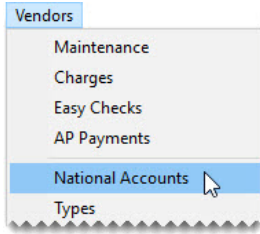
**Note:** Reconciliation codes are sometimes called *recon* codes.

### Walk-Through: Setting Up a Reconciliation Code

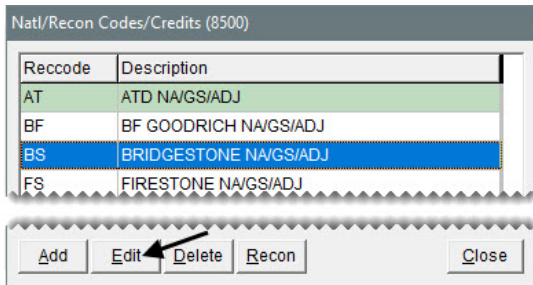
Update the Bridgestone reconciliation code. First, change the local distributor to Parrish Tire, and then assign the general ledger account for tracking Bridgestone Expected credits.

## To set up a reconciliation code

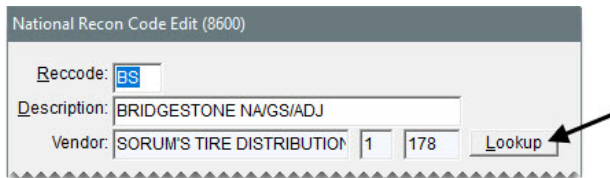
1. From the **Vendors** menu, select **National Accounts**. The Natl/Recon Codes/Credits screen appears.



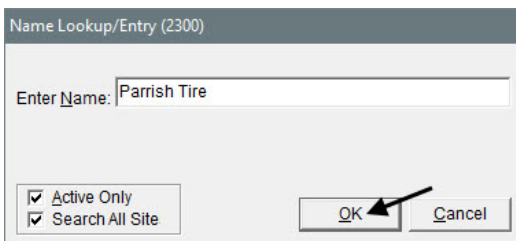
2. Select the reconciliation code for Bridgestone, and click **Edit**. The National Recon Code Edit screen appears.




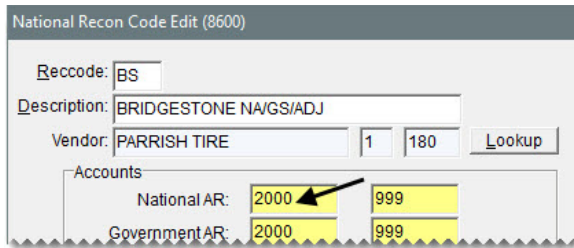
3. Change the vendor assigned to the reconciliation code.
  - a. Click **Lookup**. TireMaster prompts you for the vendor's name.



- b. Type **Parrish Tire** and click **OK**.



4. Update the AR accounts for the reconciliation code.
  - a. Click the field for the first AR account, and press . The Chart of Accounts appears.



National Recon Code Edit (8600)

Recode: BS

Description: BRIDGESTONE NA/GS/ADJ

Vendor: PARRISH TIRE 1 180

Accounts

|                |      |     |
|----------------|------|-----|
| National AR:   | 2000 | 999 |
| Government AR: | 2000 | 999 |

- b. Select account 2000–995 for Bridgestone expected credits and click **OK**.

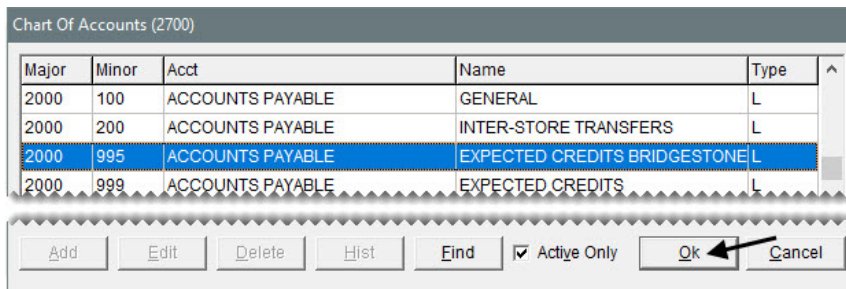


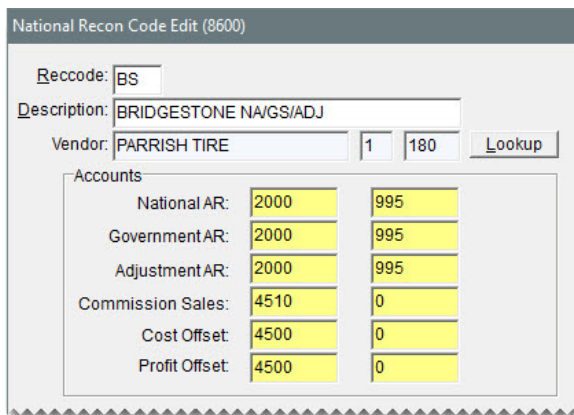
Chart Of Accounts (2700)

| Major | Minor | Acct             | Name                         | Type |
|-------|-------|------------------|------------------------------|------|
| 2000  | 100   | ACCOUNTS PAYABLE | GENERAL                      | L    |
| 2000  | 200   | ACCOUNTS PAYABLE | INTER-STORE TRANSFERS        | L    |
| 2000  | 995   | ACCOUNTS PAYABLE | EXPECTED CREDITS BRIDGESTONE | L    |
| 2000  | 999   | ACCOUNTS PAYABLE | EXPECTED CREDITS             | L    |

Active Only

**Note:** If you'll be using a TireMaster Point of Sale system, you'll select a preset account for expected credits instead.

- c. To assign the two other AR accounts, repeat steps 4a and 4b.



National Recon Code Edit (8600)

Recode: BS

Description: BRIDGESTONE NA/GS/ADJ

Vendor: PARRISH TIRE 1 180

Accounts

|                   |      |     |
|-------------------|------|-----|
| National AR:      | 2000 | 995 |
| Government AR:    | 2000 | 995 |
| Adjustment AR:    | 2000 | 995 |
| Commission Sales: | 4510 | 0   |
| Cost Offset:      | 4500 | 0   |
| Profit Offset:    | 4500 | 0   |

**Tip:** If you know the numbers for the accounts you want to assign, you can type the account numbers instead of doing a lookup.

5. For this reconciliation code, do not change the commission percentages and GL classes.

**Note:** The GL class makes it possible for you to track national account, government support, and adjustment sales separately from regular sales.

- To save the reconciliation code, click **OK**.

- Close the Natl/Recon Codes/Credits screen.

## Assigning Reconciliation Codes to Items

Once you create a reconciliation code for a vendor, you need to assign it to the items in the vendor's product line.

### Walk-Through: Assigning a Reconciliation Code to an Item

Assign the Bridgestone reconciliation code to the Potenza tire with product code 074554.

#### To assign a reconciliation code to an item

- Look up the Potenza tire with product code 074554.
- On the Inventory Maintenance screen, click **Edit**.

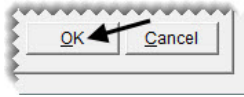
- Click the **Recon Code 1** field, and press **[F4]**. Then select the reconciliation code for Bridgestone, and click **OK**.

**Note:** National-account, government-support, and adjustment sales for some manufacturers can be processed electronically with applications that are integrated with TireMaster. In these scenarios, the reconciliation code needs to have a corresponding vendor part number for



successful processing. In other words, if you assign the Bridgestone vendor part number in the **Vendor Part Number 1** field, the Bridgestone reconciliation code needs to be entered in the **Rec Code 1** field. You can assign up to four vendor part numbers and reconciliation codes to the items in your inventory. The vendor part number and reconciliation code that you use most often should be entered in the **Vendor Part Number 1** and **Rec Code 1** fields.

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



- Close the Inventory Maintenance screen.

### Exercise

Use Inventory List Editing to assign the Bridgestone reconciliation code to all Potenza tires with 15 inch rims.

## National-Account & Government-Support Customers

Before you can process national-account and government-support sales and credits, you need to complete settings that distinguish these two types of customers from your regular clientele.

- ◆ **National-account customers:** These customers have agreements with vendors to buy tires, and perhaps other items or services, from certain dealers. In these arrangements, the vendors set the prices. Typically, an item's price is your cost for that item, or it might be a price established by a price level.
- ◆ **Government-support customers:** These customers have agreements with vendors to buy tires at discounted prices from certain dealers. Vendors set the tire prices to amounts that are usually *below* your cost. You can also sell other items and services at their regular prices. Government-support customers include both government agencies and other organizations that receive price supports.

## Setting Up National-Account Customers

To distinguish national-account customers from the rest of your clients, you need to assign each of them the national-account customer type and at least one reconciliation code. The reconciliation code identifies the vendor with whom the customer has a national-account agreement.

### Walk-Through: Setting Up National-Account Customers

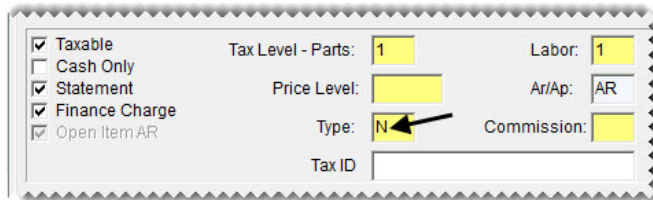
United Parcel Service has national-account agreements with both Bridgestone and Goodyear. Classify this client as a national-account customer and complete the settings required for the two vendors. For both Bridgestone and Goodyear, assign dealer numbers and exclude prices from completed invoices. For Bridgestone sales, invoices also need to be referred to as delivery receipts.

### To set up a national-account customer

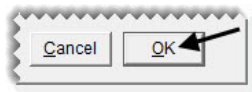
1. Look up the customer record for United Parcel Service.
2. Assign the national-account customer type.
  - a. Click **Edit**.



- b. Click the **Type** field, and press [~]. Then select the type for national-account sales, and click **OK**.

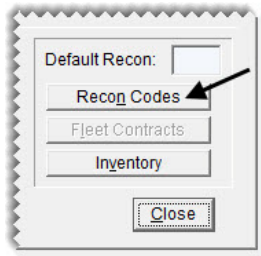


- c. To save your changes to the customer record, click **OK**.

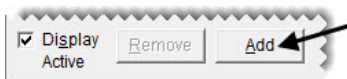


3. Assign the Goodyear reconciliation code and dealer number.

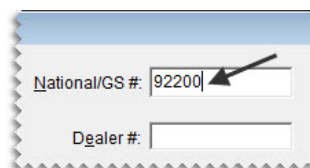
- a. Click **Recon Codes**. The Customer Recon Codes screen appears.



- b. Click **Add**.

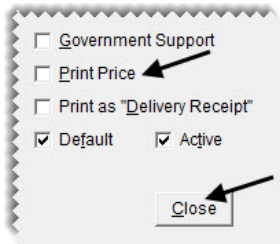


- c. Select the Goodyear reconciliation code from the list, and click **OK**.
    - d. For the dealer number, type **92200**.

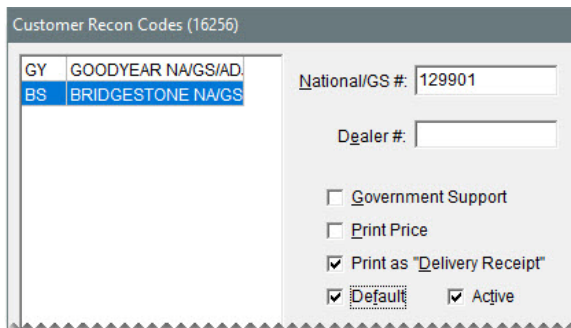


**Note:** The customer's dealer number is typically entered in the field labeled **National/GS#**, while the customer's non-sig is entered in the field labeled **Dealer #**.

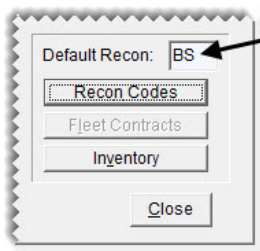
- e. Make sure the **Print Price** check box is clear (to exclude prices from invoices).
- f. Click **Close**.



4. Assign the Bridgestone reconciliation code and dealer number. Then define this reconciliation code as the default.
  - a. Repeat steps 3a and 3b. The dealer number is **129901**. (Hint: Enter it in the **National/GS#** field.)
  - b. Select the Bridgestone Reconciliation code, and click **OK**.
  - c. To print the title *Delivery Receipt* (instead of Invoice) on completed sale tickets, select the **Print as Delivery Receipt** check box.
  - d. Select the **Default** check box.



- e. Click **Close**. Because the Bridgestone reconciliation code is the default, it's displayed on the Customer Maintenance screen.



5. Close the Customer Maintenance screen.

## Exercise

Update the customer record for the City of Meridian. This client just reached a government-support agreement with Goodyear.

# Performing National-Account Sales

In a national-account sale, you sell items at vendor-assigned prices to a customer. At the end of the sale, the customer doesn't pay you for the items and services; the customer pays the vendor instead. The vendor then completes the cycle by giving you a credit and possibly a commission or handling fee.

## Walk-Through: Performing a National-Account Sale

Sue from UPS stops by to get new tires for her van. It has 99,122 miles on the odometer, and you use the unit number UPS1035 to look it up. Kris Johnson mounts a set of size LT245/75R16 Goodyear tires, and you include a computer balance and valve stems on the work order. When you complete the sale, charge it to UPS.

### To perform a national-account sale

1. Start a work order for UPS.
  - a. When TireMaster prompts you to look up the customer, type **UPS1035** in the **Unit #** field and click **OK**. The Customer List appears.

Name Lookup/Entry (2300)

Enter Name:

License #:  Phone # (Last 4):

Customer #:  Unit #:

VIN #:

Active Only  
 Search All Site

- b. Make sure United Parcel Service is selected, and click **OK**. The Customer Maintenance screen appears.

Customer List (500)

| Site# | Cust# | Name                  | License | Year | Make          |
|-------|-------|-----------------------|---------|------|---------------|
| 1     | 205   | UNITED PARCEL SERVICE | C800900 | 13   | MERCEDES-BENZ |

- c. Click **OK** to continue. The Work Order screen appears.



2. Click **OK** (again) to continue. TireMaster prompts you for a reconciliation code.



3. Select the Goodyear code and click **OK**.

4. Add a set of Goodyear MTR w/Kevlar size LT245/75R16 tires to the work order:

**Note:** This item is added to the work order at your cost.

5. Delete the tire tax, warranty, and disposal fee add-ons.

| Quantity | Size           | Description           | Parts  | Labor | Fl |
|----------|----------------|-----------------------|--------|-------|----|
| 4.00     | LT245/75R16/10 | MTR W/KEVLAR          | 213.64 | 0.00  |    |
| 4.00     | .              | COMPUTER BALANCE - LT | 0.00   | 12.99 |    |
| 4.00     | .              | RUBBER VALVE STEM     | 1.99   | 0.00  |    |

6. Assign mechanic Kris Johnson to the work order.

| Extend | Sales  | Mech 1 | Mech 2 | Flat Rate | Cor |
|--------|--------|--------|--------|-----------|-----|
| h      | 854.56 | Admin  | KJ     | 0.00      |     |
| ts     | 51.96  | Admin  | KJ     | 0.00      |     |
| ts     | 7.96   | Admin  | KJ     | 0.00      |     |

7. Complete the invoice as a charge sale. You can disregard entering DOT numbers. The ending mileage for the van is 99,122.

# Performing Government-Support Sales

In a government-support sale, you sell the customer tires at a discount and other items at their regular prices. The customer pays you, and you submit a claim to the vendor. Then the vendor gives you a credit for the difference between your cost of the tires and the price they were sold for. Depending on the circumstances, the vendor might also give you a commission or a handling fee.

## Walk-Through: Performing Government-Support Sales

A deputy from the Garner County sheriff's office brings in his Dodge Charger. Russell Smith mounts a new set of size 235/55R18 Bridgestone tires on the car, which has 125,635 miles on the odometer.

### To perform a government-support sale

1. Start a work order for the Garner County Sheriff's Department. When prompted for a vehicle, select the 2012 Dodge Charger.
2. When the warning appears, click **Yes** to continue despite the customer's overdue balance. The Work Order screen appears.
3. Type **125635** in the **Miles (In)** field, and click **OK**.

Work Order (3700)

Starting Sales Person: Admin  Print #Copies: 0

P.O. Number:

Ref#:   ETA

Year: 12 License#: GCS4

Make: DODGE Miles (In): 125635

Model: CHARGER Miles (Out):

OK Cancel

4. Make sure the Bridgestone reconciliation code is selected and click **OK**.

Customer Recon Codes (16256)

BS BRIDGESTONE NA/GS National/GS #: BS-00-1080

Display Active Remove Add OK Cancel

5. Add 4 size 235/55R18 Bridgestone tires to the work order. The product code for the tires is 072650.

- Change the parts price for the tires to **75.00** and labor price of the computer balance to **5.00**. If the below cost warning appears, click **OK** to close the message.

| Quantity | Size      | Description            | Parts | Labor | Ft |
|----------|-----------|------------------------|-------|-------|----|
| 4.00     | 235/55R18 | D687 H/T DUELER        | 75.00 | 0.00  |    |
| 4.00     | .         | COMPUTER BALANCE - LT  | 0.00  | 5.00  |    |
| 4.00     | .         | RUBBER VALVE STEM      | 1.99  | 0.00  |    |
| 4.00     | .         | STATE TIRE TAX (FEE)   | 3.00  | 0.00  |    |
| 4.00     | .         | LT ROAD HAZARD WARRANT | 12.63 | 0.00  |    |
| 4.00     | .         | TIRE DISPOSAL - LT.    | 3.00  | 0.00  |    |

- Assign mechanic Russell Smith to the work order.

| Extnd  | Sales | Mech 1 | Mech 2 | Flat Rate | Cor |
|--------|-------|--------|--------|-----------|-----|
| 300.00 | Admin | RS     |        | 0.00      |     |
| 20.00  | Admin | RS     |        | 0.00      |     |
| 7.96   | Admin | RS     |        | 0.00      |     |
| 12.00  | Admin | RS     |        | 0.00      |     |
| 50.52  | Admin | RS     |        | 0.00      |     |
| 12.00  | Admin | RS     |        | 0.00      |     |

- Complete the invoice as a charge sale. You can disregard entering DOT numbers. The ending mileage is 125,635.

Invoice Completion (3900)

Invoice Total:

| Pay Type       | Amount |
|----------------|--------|
| Cash           | 0.00   |
| Check          | 0.00   |
| Charge         | 402.48 |
| Credit / Debit | 0.00   |
| Credit / Debit | 0.00   |
| Credit / Debit | 0.00   |
| Credit / Debit | 0.00   |
| Credit / Debit | 0.00   |
| Credit / Debit | 0.00   |
| Credit / Debit | 0.00   |
| Credit / Debit | 0.00   |
| Credit / Debit | 0.00   |

Deposit:

Total Tended:

Change Due:

Print # of Copies:

Completed:  Sales:

License #:  Dept:

Miles In:  Out:

PO#:  Ref:

Terms:  1 Payment  3 Payments  
 2 Payments  4 Payments  
 Define

Direct Deposit  Tax Exempt Cert.  
 Apply ROA  Flag Old Invoices

Comments:

Marketing

## Creating Adjustment Invoices

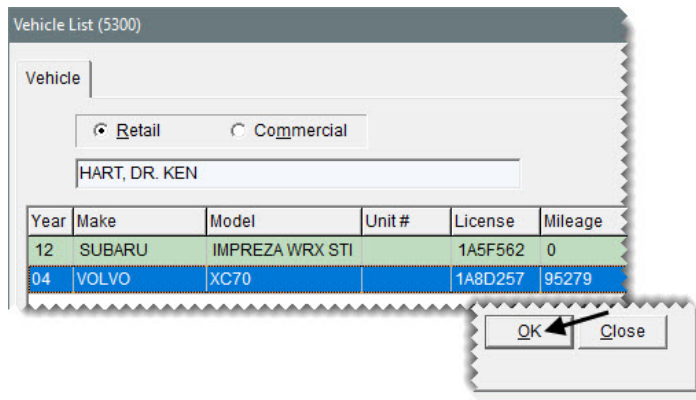
In an adjustment sale, a customer returns a defective item to you. Then you sell the customer a replacement item at a discount. After the sale, you submit a claim to the vendor. The vendor then gives you a credit for the difference between the item's cost and the selling price for the replacement.

## Walk-Through: Performing an Adjustment

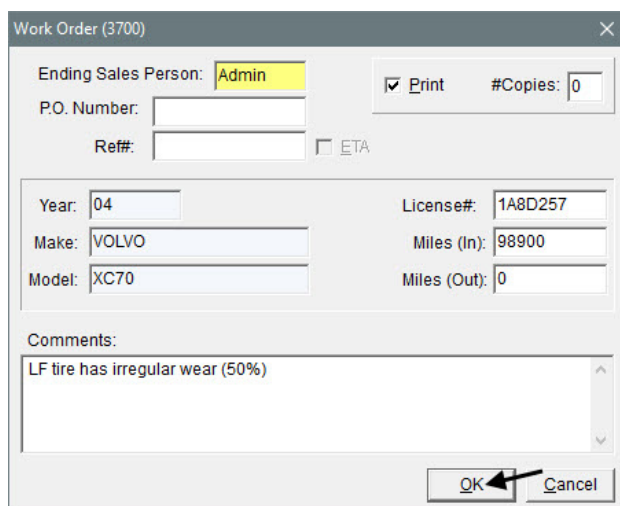
Dr. Ken Hart comes in to see if he can buy a replacement tire for his 2004 Volvo. Once Russell Smith verifies that the tire has irregular wear, sell Dr. Hart a new one at a discount. The claim number for this adjustment is GY10023. According to the original invoice, the tire's product code is 407016374.

### To perform an adjustment sale

1. Start a work order for Dr. Ken Hart.
2. When the Vehicle List appears, select the 2004 Volvo and click **OK**.



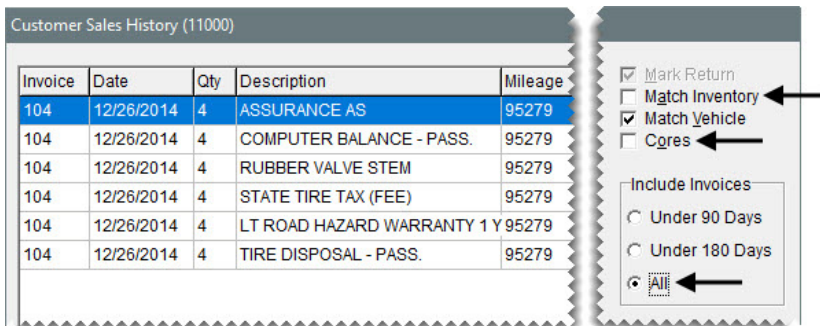
3. Add the following information to the work order screen:
  - ♦ The beginning mileage **98900**.
  - ♦ The comment **LF tire has irregular wear (50%)**.
4. Click **OK** to continue. The Invoice Entry screen appears.



5. If you want to find out when you sold the tire to the customer, check his sales history.
  - a. Press **F8**. The Customer Sales History screen appears.



- b. To view all of the items the customer previously purchased for the selected vehicle (the Volvo), clear the **Match Inventory** and **Cores** check boxes and make sure **All** is selected.



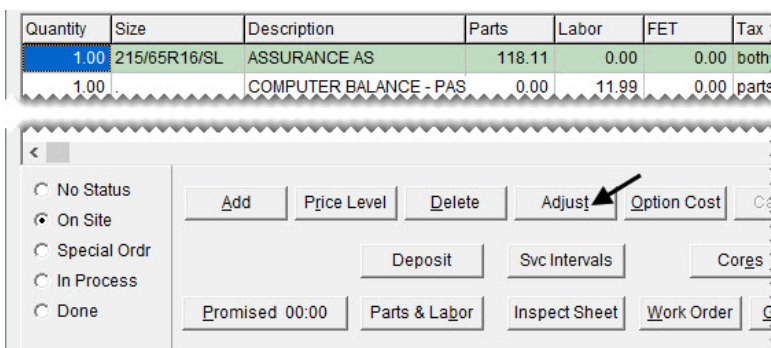
- c. Once you verify that the customer purchased a Goodyear Assurance tire, click **Cancel** to close the Customer Sales History screen.



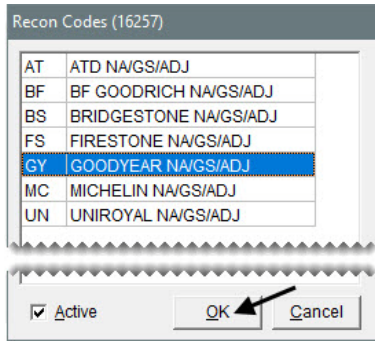
- 6. Add the defective item to the work order.
  - a. Type the product code **407016374** in the **Size** column, and press **Enter**. A Goodyear Assurance tire is added to the order.
  - b. For the quantity, type **1** and press **Enter**.

| Quantity | Size         | Description  | Parts  | Labor | F |
|----------|--------------|--------------|--------|-------|---|
| 1        | 215/65R16/SL | ASSURANCE AS | 118.11 | 0.00  |   |

- 7. Enter the claim number for the adjustment.
  - a. Select the row for the Goodyear Assurance tire. Then click **Adjust**. The Recon Codes screen appears.



- b. Select the reconciliation code for Goodyear, and click **OK**. TireMaster prompts you for a claim number.

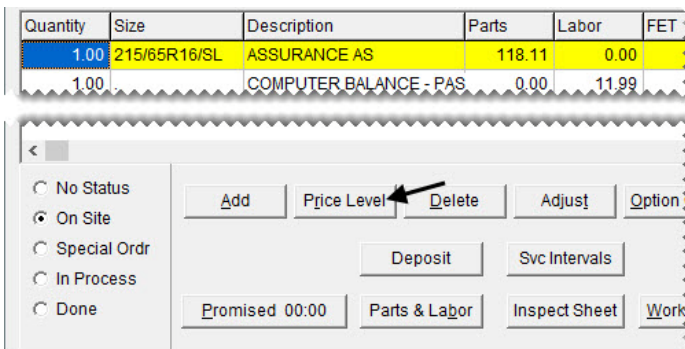


- c. Type **GY10023** and click **OK**.



The following message appears: “You should change the sales price to the adjusted price of the item.”

- d. Click **OK** to close the message. The line for the tire turns yellow to signify that the price is being adjusted.
8. Enter the adjusted price of the tire.
- a. Select the row for the tire and click **Price Level**. The Global Price Levels screen appears.



- b. Select the 50% adjustment and click **OK**.

Global Price Levels (16186)

ASSURANCE AS

| Level | Descr           | Parts | Labor | Total | Current |
|-------|-----------------|-------|-------|-------|---------|
| AD09  | ADJUSTMENTS 9%  | 10.63 | 0.00  | 10.63 |         |
| AD17  | ADJUSTMENTS 17% | 20.08 | 0.00  | 20.08 |         |
| AD25  | ADJUSTMENTS 25% | 29.53 | 0.00  | 29.53 |         |
| AD33  | ADJUSTMENTS 33% | 38.98 | 0.00  | 38.98 |         |
| AD42  | ADJUSTMENTS 42% | 49.60 | 0.00  | 49.60 |         |
| AD50  | ADJUSTMENTS 50% | 59.05 | 0.00  | 59.05 |         |
| AD58  | ADJUSTMENTS 58% | 68.50 | 0.00  | 68.50 |         |

OK Cancel

- 9. Assign mechanic Russell Smith to the work order.

| Tax   | Extend | Sales | Mech 1 | Mech 2 | Flat Rate | Cor |
|-------|--------|-------|--------|--------|-----------|-----|
| both  | 59.05  | Admin | RS     |        | 0.00      |     |
| parts | 11.99  | Admin | RS     |        | 0.00      |     |
| parts | 1.99   | Admin | RS     |        | 0.00      |     |
| none  | 3.00   | Admin | RS     |        | 0.00      |     |
| parts | 11.81  | Admin | RS     |        | 0.00      |     |
| parts | 3.00   | Admin | RS     |        | 0.00      |     |

- 10. Complete the invoice.

- a. Click **Complete**. The DOT Information screen appears.

Work Order Complete Quit Tax: 4.55 Total: 95.39

- b. Type the number **M65UGDY5016**, and click **OK**. The Invoice Completion screen appears.

DOT Information (16580)

|          |               |             |              |
|----------|---------------|-------------|--------------|
| Cust No. | Name          | Invoice No. | Invoice Date |
| 1-129    | HART, DR. KEN | 1- 130      | 2018-01-09   |

| Num | Product Code | Size         | Description  | DOT Number  |
|-----|--------------|--------------|--------------|-------------|
| 1   | 407016374    | 215/65R16/SL | ASSURANCE AS | M65UGDY5016 |

Setup Print Copy DOT to the next line OK Cancel

- c. Click the **Cash** row, and press **[F4]** to insert the exact invoice amount.
- d. Type **98900** in the (miles) **Out** field.

- e. Click **OK**. The TireMaster - Texting screen appears.

Invoice Completion (3900)

Invoice Total: 95.39

| Pay Type       | Amount |
|----------------|--------|
| Cash           | 95.39  |
| Check          | 0.00   |
| Charge         | 0.00   |
| Credit / Debit | 0.00   |
| Credit / Debit | 0.00   |
| Credit / Debit | 0.00   |
| Credit / Debit | 0.00   |
| Credit / Debit | 0.00   |
| Credit / Debit | 0.00   |
| Credit / Debit | 0.00   |
| Credit / Debit | 0.00   |
| Credit / Debit | 0.00   |
| Credit / Debit | 0.00   |
| Credit / Debit | 0.00   |
| Credit / Debit | 0.00   |
| Credit / Debit | 0.00   |

Deposit: 0.00

Total Tended: 95.39

Change Due: 0.00

Print # of Copies: 0

Completed: 1/ 9/2018 Sales: Admin

License #: 1A8D257 Dept: 0

Miles In: 98900 Out: 98900

PO#: Ref: GY10023

Terms:  1 Payment  3 Payments  
 2 Payments  4 Payments  
 Define 0

Direct Deposit  Tax Exempt Cert.  
 Apply ROA  Flag Old Invoices

Comments:  
 LF tire has irregular wear (50%)

Marketing OK Cancel

- f. Select the Thank You message, make sure it's set to be sent in one hour, and click **Send Text**. TireMaster sends the text and prompts you to complete and print the invoice.

TireMaster - Texting (16493)

First Name: DR. KEN Vehicle: 12-SUBARU - IMPREZA WRX STI

Last Name: HART Vehicle: 04-VOLVO - XC70

Number: 2085557777

Message: Text Name: Thank You

Send Text When:  Now  15 minutes  30 minutes  1 hour  3 hours

Reminders:  Oil Change

Text Setup History Send Text Close

Custom Message

- g. Click **Yes**.

11. Print the invoice and close the open screens.

## Reconciling Vendor Credits

When a vendor gives you a credit for a national-account, government-support, or adjustment sale, you need to compare it to the credit amount you were expecting to determine whether you made a profit or lost money on the sale. In TireMaster, this process is called reconciliation.

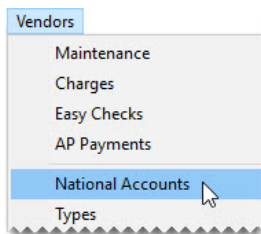
A national-account credit should reimburse you for roughly the entire amount of an invoice, in addition to any commissions or handling fees. Credits for government-support agreements and adjustments could vary depending on your arrangements with your vendors.

### Walk-Through: Reconciling a Vendor Credit

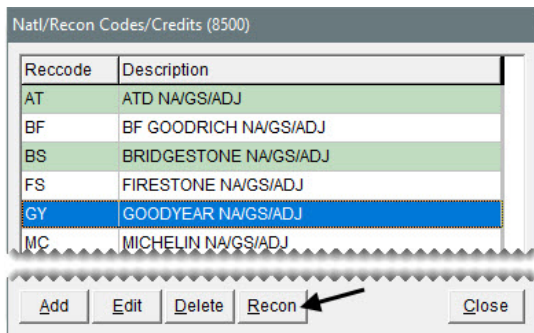
Your Goodyear vendor sent you a credit memo for a defective tire that a customer returned. The credit amount is \$18, and the memo number is GY-4302. The claim number for the original adjustment is GY10023.

#### To reconcile a vendor credit

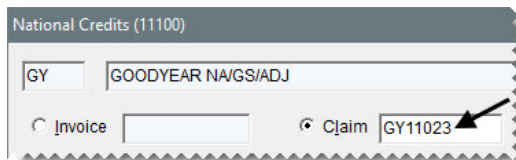
1. From the **Vendors** menu, select **National Accounts**. The Natl/Recon Codes/Credits screen appears.



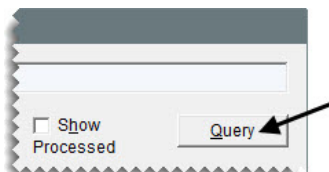
2. Select the reconciliation code for Goodyear and click **Recon**. The National Credits screen appears.



3. Retrieve the invoice associated with the credit.
  - a. Select **Claim** and type **GY10023**.



- b. Click **Query**.



**Note:** You can also retrieve credits by invoice number, date, and processing status.

4. Enter the information for the credit.

a. For the memo number, type **GY-4302**.

b. For the credit date, type today's date.

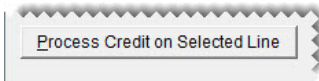
**Note:** When you type the credit date, put slashes (/) between the month, day, and year. Also, type all four digits for the year. (**Example:** 02/19/2018.)

c. For the credit amount, type **18.00**.

| Amount | Com  | Claim   | Memo#   | CR Date    | CR Amt | CR Com | Diff  | P |
|--------|------|---------|---------|------------|--------|--------|-------|---|
| 26.95  | 0.00 | GY10023 | GY-4302 | 01/09/2018 | 18.00  | 0.00   | -8.95 |   |

5. Process the credit.

a. Click **Process Credit on Selected Line**. TireMaster prompts you to complete the credit memo.



b. Click **Yes**.

**Note:** If you want to see the completed memo, select the **Show Processed** check box.

6. To close the National Credits screen, click **OK**.

## Exercises

- A. Goodyear sent you a \$965 credit memo for a national-account sale. The handling fee is \$10, the memo number GY-8877, and the original claim number is 97110.
- B. Bridgestone sent you a \$200 credit for a government-support sale. The memo number is BS-125 and the original claim number is 42353.

# Processing Core Credits

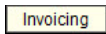
With the Core Manager, you can track and recover core charges issued by parts suppliers. When a vendor comes to your shop to pick up the cores you've collected, you can process the credits that the vendor will give you for those items.

## Walk-Through: Processing Core Credits

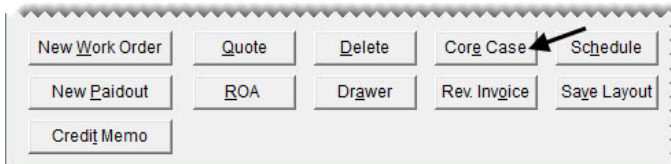
A representative from O'Reilly has arrived to pick up that vendor's cores. Process the core for the water pump you installed for Lori Jones.

## To process a core credit

1. Open the Core Manager.
  - a. Click **Invoicing**. The Open Work Order List appears.

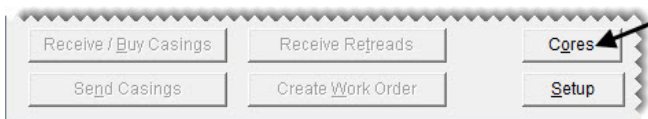


- b. Click **Core Case**. The Casing Manager screen appears.

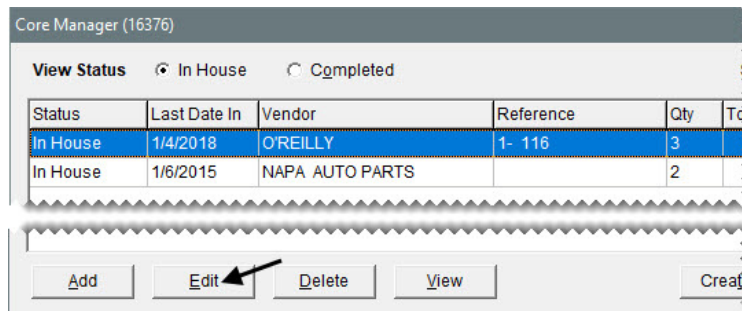


**Note:** You access the Core Manager via the Casing Manager.

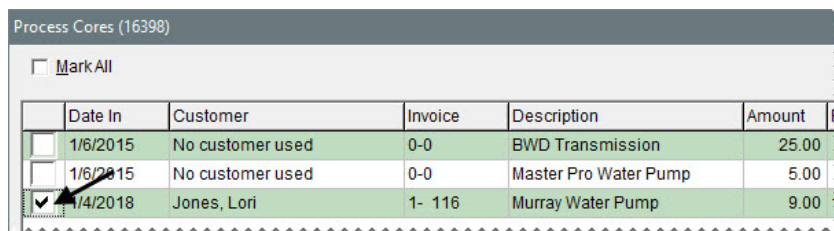
- c. Click **Cores**. The Core Manager screen appears.



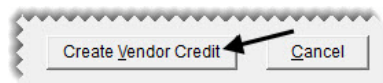
2. Select the row for O'Reilly and click **Edit**. The Process Cores screen appears.



3. Select the check box for the \$9.00 core charge (Murray Water Pump).

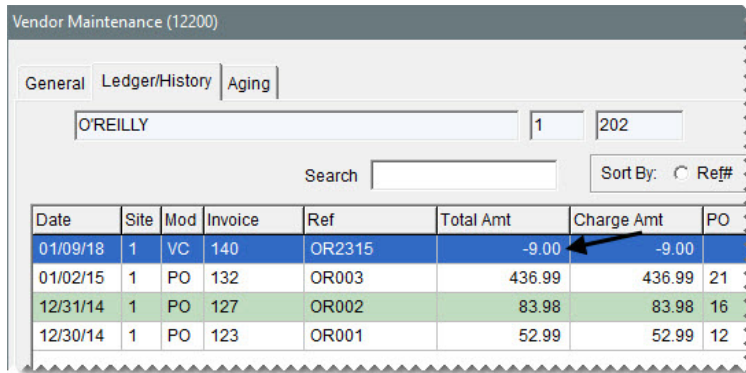


4. Click **Create Vendor Credit**. A confirmation message appears.



5. Click **Yes**. TireMaster prompts you for a reference number.
6. Type **OR2315** and click **OK**. The Report Window opens and displays the Charge Edit Report.
7. Print the report and close the Report Window. A confirmation message appears.

8. Click **OK** to close the message.
9. Close the Core Manager and the other open screens.
10. Verify that the \$9.00 credit posted to the vendor’s subledger.
  - a. Look up the vendor record for O’Reilly. The Vendor Maintenance screen appears.
  - b. Click the **Ledger/History** tab. The credit list listed with the other activity for the vendor’s account.



**Note:** In TireMaster Plus and TireMaster Corporate systems, you need to apply the credit to outstanding charges (if any) in the vendor’s subledger.

- c. Close the Vendor Maintenance screen.

## Exercise

Process the remaining O’Reilly core credits in a group.



# Shift-End & Day-End Closing

Depending on your daily operations, you'll add and remove money from your till (or tills) and stop business one or more times to count the cash, checks, and payment card receipts you've accumulated. Later, at the end of the day or when you're ready to make a trip to the bank, you'll prepare a bank deposit. This chapter includes the following topics:

- ◆ [“Paying Expenses from the Till” on page 187](#)
- ◆ [“Closing a Shift” on page 188](#)
- ◆ [“Closing the Day” on page 189](#)

## Paying Expenses from the Till

To pay expenses from the till, perform a transaction called a payout. When you perform a payout, TireMaster reduces the expected cash amount for your shift-end till totals. You can also use a payout to record miscellaneous revenue, such as money collected from soda and candy machines.

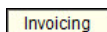
**Note:** Do not use payouts to reimburse customers for trade-ins. Trade-ins are handled differently.

### Walk-Through: Paying an Expense from the Till

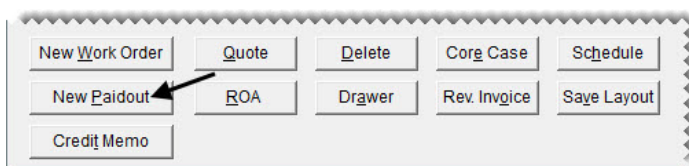
Enter a payout for \$63.45. The money will cover the bill for the pizza that will be served at the employee meeting. Offset the payout to the account for meals and entertainment.

#### To pay an expense from the till

1. Click **Invoicing**.



2. Click **New Payout**. The Cash Payout screen appears.



- For the description, type **Pizza for employee meeting**.

Cash Payout (15300)

Description / Notes:  
Pizza for employee meeting

- Make an entry for the payout.
  - Click **Add**. A journal-entry line appears in the **GL Offset** area.

Add Delete

- Click the **Major** column, and press  $\sim$ . Then select account 6260–0 Meals & Entertainment, and click **OK**.
- For the description, type **Pizza for employee meeting**.
- For the amount, type **63.45**.

| Site | Dept | Major | Minor | Description                | Amount | CL |
|------|------|-------|-------|----------------------------|--------|----|
| 1    | 1    | 6260  | 0     | Pizza for employee meeting | 63.45  | 1  |

- Click **OK**. TireMaster prompts you to complete the payout.

OK Cancel

- Click **Yes**. The Report Window opens.
- Print the payout report and close the Report Window.

## Exercises

- Take \$25 out of the till for postage stamps.
- The total of the stamps came to \$19.60. Create a payout that will put \$5.40 in change back into the till.

## Closing a Shift

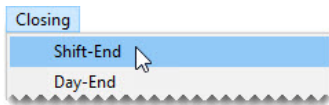
When you close a shift, you stop transactions for a specific till, so you can count the cash, checks, and payment card receipts for that till at that point in time. You can close out a till once a day or several times a day. When you close a shift, make sure to include the till float in the cash amount.

## Walk-Through: Closing a Shift

You just finished counting the cash, checks, and payment card receipts in your till. Close the shift, using the totals from the Daily Till Detail Report.

### To close a shift

1. From the **Closing** menu, select **Shift-End**. TireMaster prompts you to print a daily invoice listing.



2. Click **Yes**. The Report Window opens and displays the Daily Till Detail Report.
3. Print the report, and close the Report Window. TireMaster prompts you to close the shift.
4. Click **Yes**. The Shift Close - Till screen appears.
5. Type the amount of cash, checks, and credit and debit card payments collected during the shift. For this class, your instructor will provide the amounts.

**Note:** Include the starting till amount (till float) in the entry for cash. For example, if your till started with \$300 and you ended the shift with \$700, you would enter \$700 for your cash amount.

6. Click **OK**. TireMaster prompts you to verify the cash, check, and card amounts.

 A screenshot of a dialog box titled "Shift# 1 Close - Till# 1 (9001)". It contains three input fields: "Cash:" with the value "2361.56", "Check:" with the value "2400.95", and "Cards:" with the value "974.03". At the bottom, there are two buttons: "OK" and "Cancel". An arrow points to the "OK" button.

7. If the amounts are correct, click **Yes** to finishing closing the shift. If the amounts need to be corrected, click **No** and make the needed changes.
8. When TireMaster confirms the shift is closed, click **OK**.

## Closing the Day

The day-end close gives you an opportunity to review the day's receipts and determine if your till is over or short. Typically, you close a day before you make a deposit into your bank account. Depending on how much business you do in an average day, you might not want to perform a day-end close every day. Before you can perform a day-end close, you need to close at least one shift.

The reports described in Table 4 are generated as part of the shift-end or day-end closing procedures.

**Table 4: Shift-End and Day-End Reports**

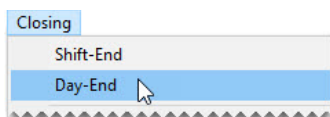
| Report                     | Description   |
|----------------------------|---|
| <b>Daily Invoice</b>       | Prints automatically when you close a day. This report displays sales activity, beginning balances, cash paid out of the till, and any overages or shortages.   |
| <b>Daily Sales</b>         | Prints automatically when you close a day. This report displays all sales activity for the day. It also separates normal sales from national-account, government-support, and adjustment activity.                    |
| <b>Daily Till Detail</b>   | Prints automatically when you close a day and can be printed during a shift-end close. This report displays all transactions that have taken place for the till that has been closed, grouping items by invoice type. |
| <b>Day End Transaction</b> | Prints automatically when you close a day. This report displays slightly more detail than the Daily Till Detail Report, and it also includes a deposit slip for the day's receipts.                                   |
| <b>Paidout</b>             | Prints automatically when you close a day. This report displays all cash transactions paid out of the till.   |

### Walk-Through: Closing the Day

You're planning on making a bank deposit this afternoon, so you need to perform a day-end close. Correct the cash, check, and card amounts if needed.

#### To close a day

1. Count the total cash, checks, and payment card receipts for all shifts.
2. From the **Closing** menu, select **Day-End**. The Day End Close screen appears.



3. If any cash, check, or payment card amounts are incorrect, type the correct amounts in the **Cash Count**, **Check Count**, and **Card Count** columns. The totals for all shifts are recalculated automatically.

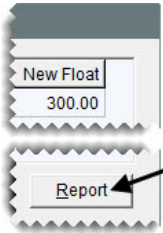
 A screenshot of the "Day End Close (11200)" screen. It displays a table with the following data:
 

| Shift | Till | Cash    | Check   | Card   | Cash Count | Check Count | Card Count | New Float |
|-------|------|---------|---------|--------|------------|-------------|------------|-----------|
| 1     | 1    | 2361.56 | 2400.95 | 974.03 | 2361.56    | 2400.95     | 974.03     | 300.00    |

 Arrows in the original image point from the "Cash Count", "Check Count", and "Card Count" columns to the "New Float" column, indicating that these counts are used to calculate the float.

**Note:** When you close the day, the amount in the **Deposit** field posts to the day-end deposit and day-end cash accounts that you have set in System Controls. This amount also appears in the Check Reconciliation screen as your daily deposit (TireMaster Plus and TireMaster Corporate systems only).

4. To view your day-end reports before you close the day, click **Report**.



5. To close the day click **OK**. TireMaster will print all of the day end reports and you can review them again if needed. A confirmation message appears.



6. Click **Yes** to close the day. A confirmation message appears.
7. Click **OK**.



# Preparing for Sales Tax Changes

TireMaster's sales tax system helps you comply with your state's sales tax laws. It's also designed to let you prepare for upcoming tax changes ahead of time.

## Updating Sales Tax Rates

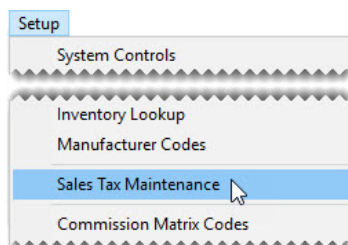
If your city, county, or state changes its sales tax rate, you can prepare for the change in advance by creating a replacement rate. There are several advantages to creating a replacement rate instead of adding a new rate:

- ◆ Because the settings of the original rate can be used for the replacement rate, you only need to update the settings that are actually changing.
- ◆ TireMaster makes sure that the effective dates for the replacement rate do not overlap the effective dates for the original rate.
- ◆ Replacement rates are automatically assigned to the same tax levels as the original rates.

### Walk-Through: Updating a Sales Tax Rate

The Idaho tax rate is going up to 7% tomorrow. To make the change, edit the ending date of the original tax rate. Then update the rate and its effective dates.

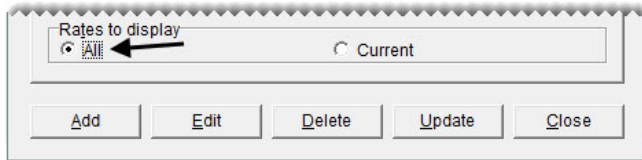
1. From the **Setup** menu, select **Sales Tax Maintenance**. The Sales Tax Setup screen appears.



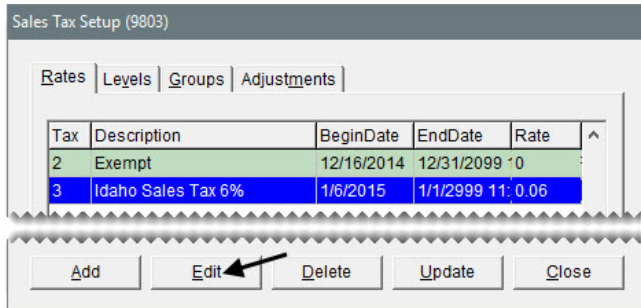
2. Make sure the **Rates** tab is selected.



3. To display both current and future rates, select **All**.



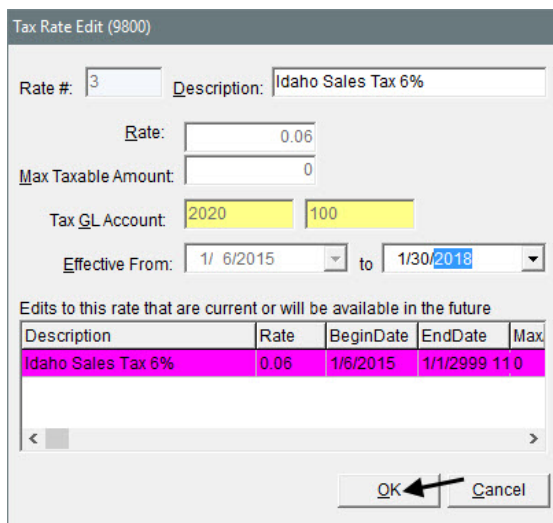
4. Edit the rate's ending date.
  - a. Select the Idaho rate and click **Edit**. The Tax Rate Edit screen appears.



- b. Change the ending date (**to** field) to today's date.

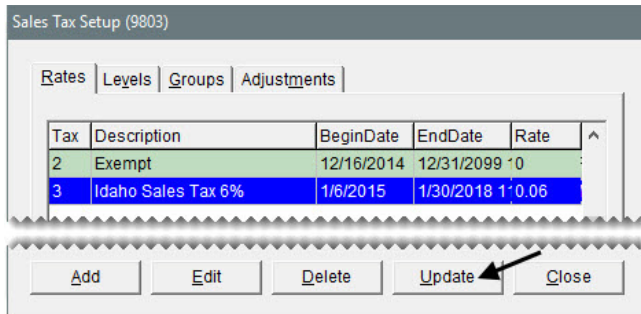
**Note:** The original rate remains in effect until 11:59:59 PM on the ending date. Therefore, if the new rate takes effect July 1, 2025, you would change the ending date of the original rate to June 30, 2025.

- c. Click **OK**.





5. Create the replacement rate.
  - a. Select the Idaho rate *again*, and click **Update**. The Tax Rate Update screen appears.

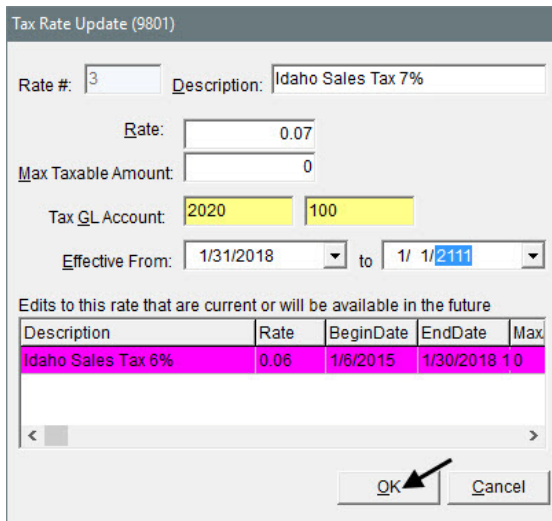


- b. Change the description to **Idaho Sales Tax 7%**.
- c. Type **.07** in the **Rate** field.
- d. Enter tomorrow's date in the **Effective From** field.
- e. Change the ending date to **1/1/2111**.

**Note:** Tax rates need to be entered as a decimal.

**Note:** You need to edit the ending date of the original rate as described in steps 4a through 4c if the following message appears: "The dates overlap with the date range for another rate in the same group. Please change the dates."

6. Make sure all of the changes are correct, and click **OK**.



**Note:** Once the replacement rate is assigned to a tax level, only its ending date can be changed. To make other changes, you need to update the rate again.

7. Close the Sales Tax Setup screen.



# Users & Security

User and security settings control user access to TireMaster and make it possible for you to monitor employee activity. This appendix includes the following topics:

- ◆ “Setting Up User Accounts” on page 197
- ◆ “Assigning Users, Permissions, and Reports to Security Groups” on page 199

## Setting Up User Accounts

User accounts help you maintain security and let you track work performed by employees. With user accounts, you can learn:

- ◆ Who started and completed a sale
- ◆ Who worked on a vehicle
- ◆ Who performed a payout (paid cash out of the till)

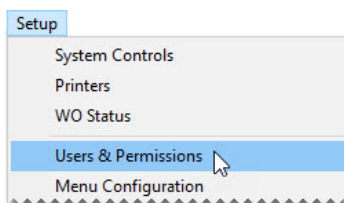
You can set up user accounts for individual employees or groups of employees. For example, you could set up one account for all of the members of your sales group. Anyone who uses TireMaster or does any sales or mechanic work needs to have a user account.

### Walk-Through: Setting Up a User Account

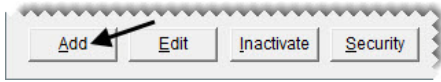
Two new employees have joined your staff. Set up user accounts for service technician Robert Martin and fill-in bookkeeper Jenny Buckman.

#### To set up new users

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



2. Add service tech Robert Martin.
  - a. Click **Add**. The Employee/User Edit screen appears.



- b. Type the name **Martin, Robert**.
- c. For the employee's ID, type **RM**.
 

**Note:** The ID can be up to five characters long. The user's initials are often the best choice for an ID.
- d. For the employee's SQL User ID, type **RMartin**.
 

**Note:** Many dealers use the employee's first initial and last name. **Example:** The SQL user for Marvin Brown would be **MBrown**.
- e. For the e-mail address, type **RMartin@awesomemechanic.com**.
- f. To identify this employee as a service technician, select the **Mechanic** check box.
 

**Note:** If you'll be using TireMaster's Scheduler, you need to define which employees are mechanics. Defining mechanics enables you to assign service technicians to appointments.
- g. Type the password **rmart** in both the **Password** and **Confirm** fields.
- h. To save the new user, click **OK**.

**Note:** New users are automatically saved as active employees and as local users. In TireMaster Point of Sale and TireMaster Plus systems, all users are local users.

3. To add bookkeeper Jenny Buckman, repeat step 2, entering the following information:
  - ♦ User ID: **JB**
  - ♦ SQL ID: **JBuckman**

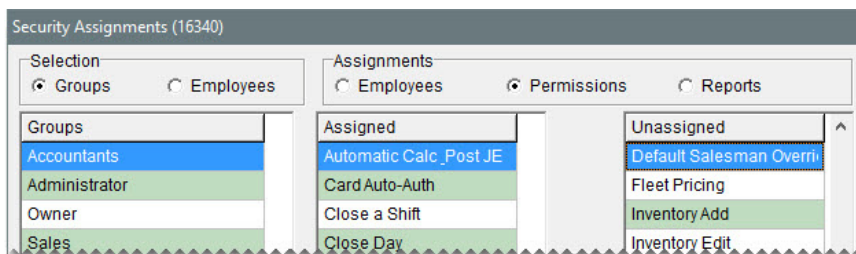
- ♦ E-mail: **jbuckman@bookkeeping.com**
- ♦ Password: **J3nB00ks**

Because this employee is not a service technician, disregard step 2f and make sure the **Mechanic** check box is clear.

4. Leave the User List open.

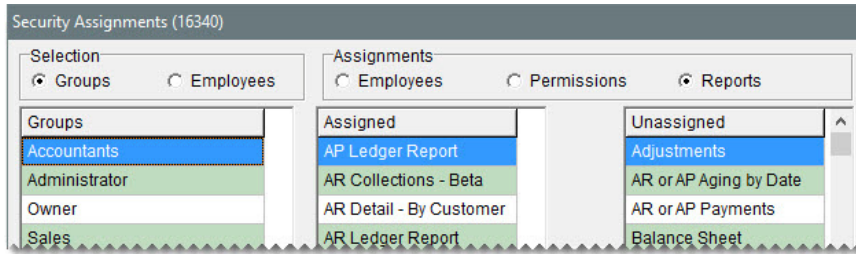
## Assigning Users, Permissions, and Reports to Security Groups

To allow employees to access TireMaster's various program areas, permissions need to be assigned to security groups (Figure 21).



**Figure 21:** Accountant Security Group Permission Assignments

Similarly, to allow employees to generate documents, you need to assign reports to the security groups.



**Figure 22:** Accountant Security Group Report Assignments

To give employees access to various program areas and reports, you need to assign them to one or more security groups.

### Walk-Through: Assigning Users to Security Groups

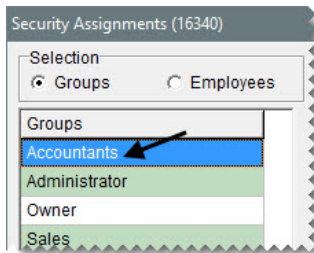
Assign the fill-in bookkeeper Jenny Buckman to the security group for accountants.

#### To assign users to security groups

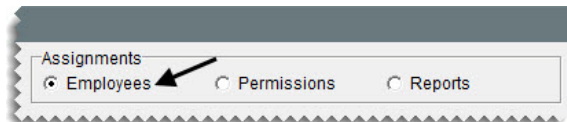
1. If the User List isn't already open, go to **Setup > Users & Permissions**.
2. Click **Security**. The Security Assignments screen opens.




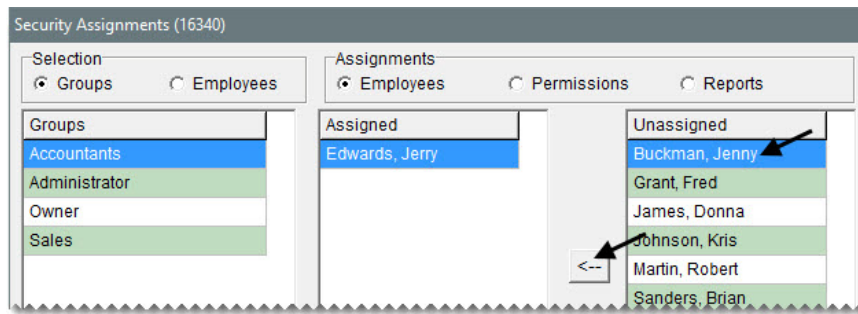
3. On the **Selection** panel, make sure **Groups** is selected.
4. Make sure the security group for Accountants is selected.



5. On the **Assignments** panel, make sure **Employees** is selected.



6. Select the name Jenny Buckman on the list of **Unassigned** employees. Then click .



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

### Exercise (Optional)

Assign permissions and reports to the security group for accountants.





# Custom Menus

You can create one or more customizable menus, based on the roles of different employees (such as front counter, back office, and administrator). Setting up a custom menu includes selecting buttons for the menu, positioning the menu, and identifying who will use the menu.

**Note:** To ensure all buttons are displayed when the screen is resized, a maximum of eight menu buttons is recommended for the resolution of 1024 x 768.

When you add a menu, you also have the option to include a clock on the main TireMaster screen when the menu is used.

## Adding a Menu

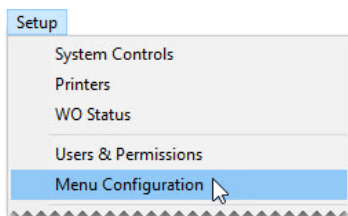
Adding a menu includes defining which buttons it will have and which locations, employees, or both are allowed to use it.

### Walk-Through: Adding a Menu

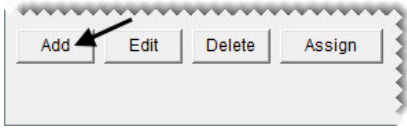
Set up a menu that can be used by your salespeople to access the invoicing, quoting, customer, inventory, and fitment guide screens. Also include an exit button and a clock.

#### To add a menu

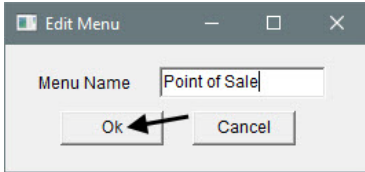
1. From the **Setup** menu, select **Menu Configuration**. The Menu Setup screen appears.



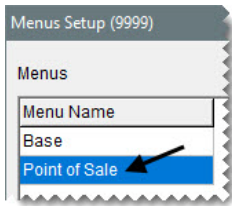
2. Click **Add**. TireMaster prompts you for a menu name.



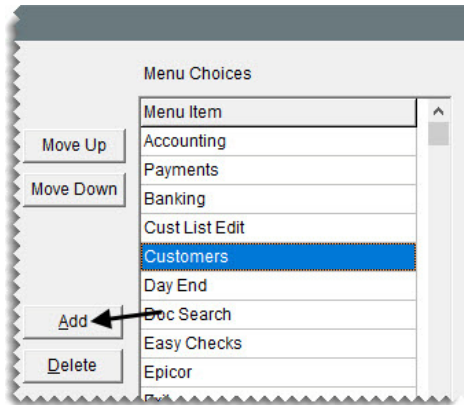
3. Type **Point of Sale** and click **OK**.



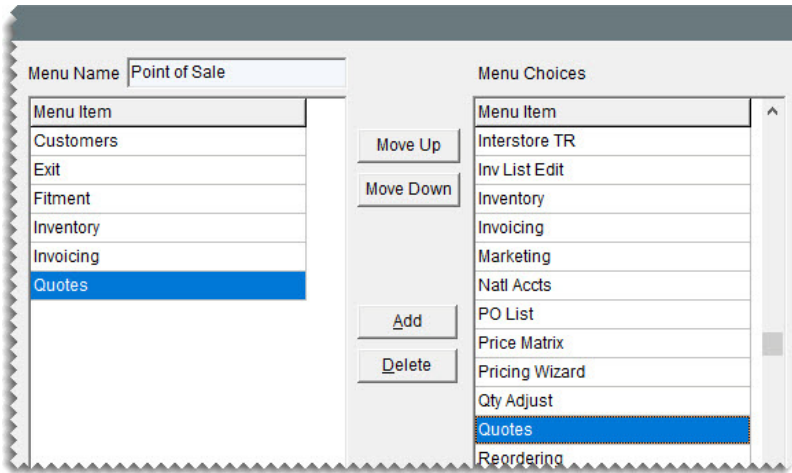
4. Assign buttons to the menu.
  - a. Make sure the Point of Sale menu name is selected on the list of menus.



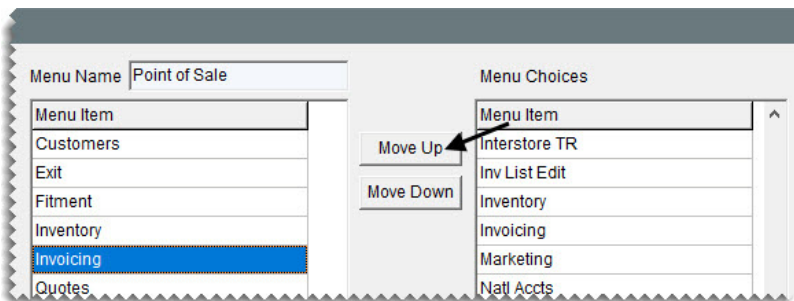
- b. Select Customers on the list of menu choices, and click **Add**.



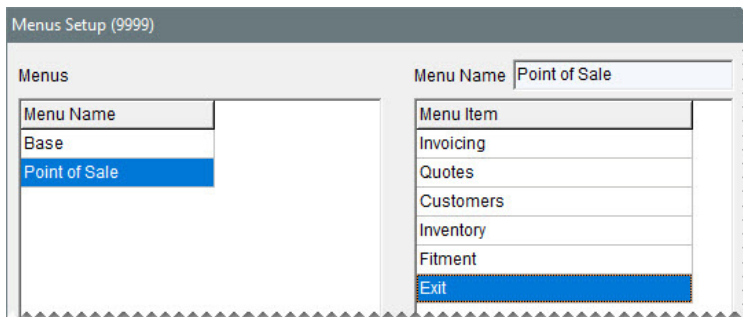
- c. Repeat step 4b to add the Exit, Fitment, Inventory, Invoicing, and Quotes buttons to the menu.



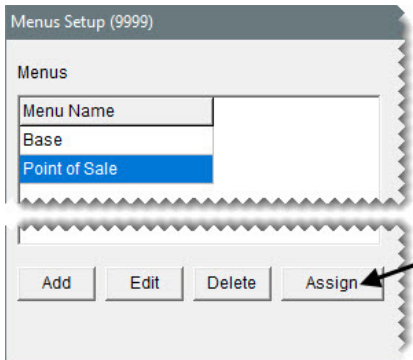
- 5. Select Invoicing on the list of assigned menu items, and click **Move Up** repeatedly until it is at the top of the list.



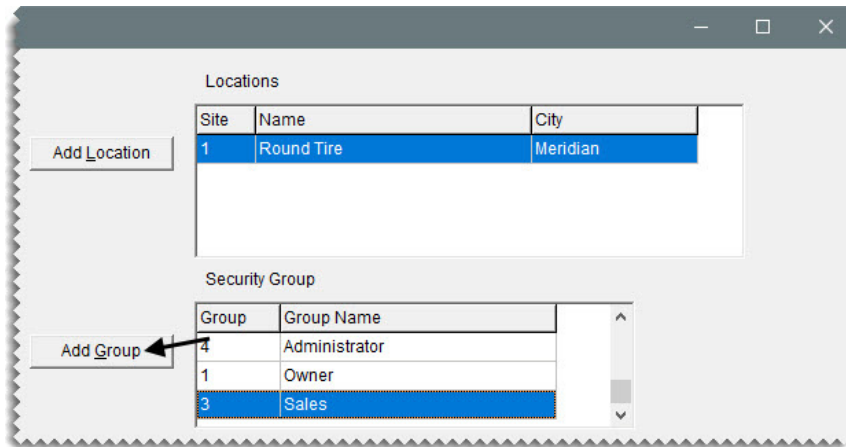
- 6. Repeat step 5 to organizing the remaining buttons in the following order: Quotes, Customers, Inventory, Fitment, and Exit.



7. Assign the menu to the user group for salespeople.
  - a. Make sure Point of Sale is selected, and click **Assign**. The Menu Assignments screen appears.



- b. Select Sales from the list of security groups, and click **Add Group**.



- c. Close the Menu Assignments screen.



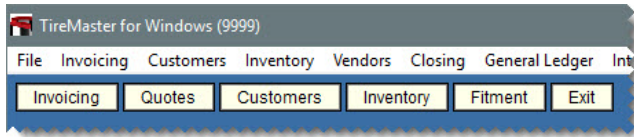
8. To include a clock on the main TireMaster screen, select the **Clock** check box. You can leave the clock positioned at the top right of the screen.



9. Close the Menu Setup screen.



10. Exit TireMaster and log in with Fred Grant's credentials (user name **fg** and password **fg**). The menu buttons change to those selected for the Sales user group.





# Work Order Status Settings

With the Work Order Status Indicator (Figure 23), you can track the progress of each job in your shop. For example when work on a vehicle is finished, you could change the status from *In Progress* to *Done*. The Work Order Status Indicator is on the Invoice Entry screen in the lower-left corner of the screen.

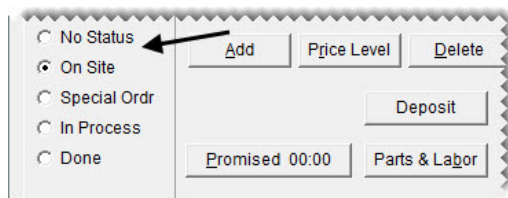


Figure 23: Work Order Status Indicator

## Adding Work Order Status Settings

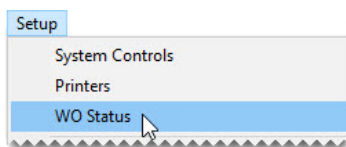
With TireMaster, you can set up a total of eight work order statuses. For each status, define the name, along with a color and a letter, number, or symbol for identifying the status. You can also define whether text messaging or email should be launched when a status is selected.

### Walk-Through: Adding a Work Order Status

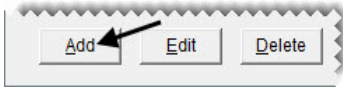
Add a status for parts on order, positioning it in between the status for special orders and jobs that are in progress.

#### To add a work order status

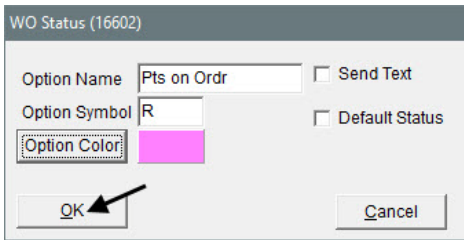
1. From the **Setup** menu, select **WO Status**. The Work Order Status Options screen appears.



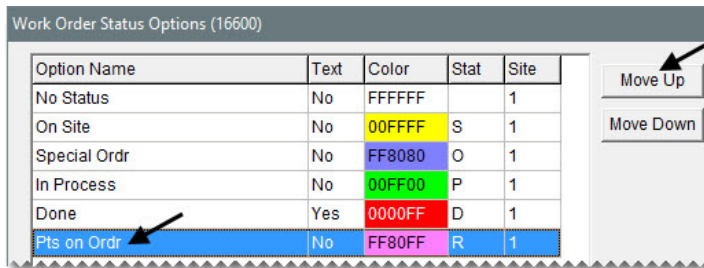
2. Click **Add**. The WO Status screen opens.



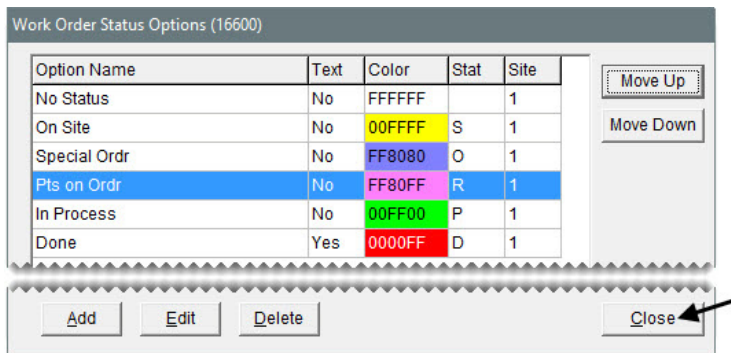
3. For the option name, type **Pts on Ordr**.
4. For the option symbol, type the letter **R**.
5. Click **Option Color**. When Color screen opens, click a pink swatch and click **OK**.
6. To save the new status, click **OK**.



7. Move the new status up, until it's listed before the status *In Process*.
  - a. Select the row for Pts on Ordr.
  - b. Click **Move Up** *twice*.



8. Close the Work Order Status Options screen.



## Exercise

Move the special order status up, so it's between No Status and On Site.



# Working with Price Matrixes

With a 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 more information, see [“Using a Price Matrix” on page 122.](#)) If your pricing model has changed, you can update your price matrixes, delete them, or copy them for use with other inventory.

## Updating a Price Matrix

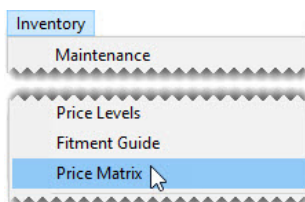
If you need to adjust the way in which a matrix calculates prices, update the matrix.

### Walk-Through: Updating a Price Matrix

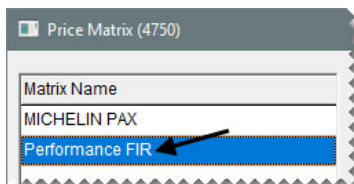
Increase each of the percentages assigned to the price matrix for Firestone tires. Then add a range to calculate a 10 percent markup for tires in the 300 to 400 dollar range.

#### To update a price matrix

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



2. Select Performance FIR. The ranges and price change information for the matrix appears.



3. Make the following changes to the range percentages:
  - ♦ For Range 1, change the percentage to 40.

- ◆ For Range 2, change the percentage to 30.
- ◆ For Range 3, change the percentage to 20.

Matrix Name: Performance FIR

Range 1  
 Low Cost: 0 High Cost: 100  Percent: 40  Amount

Range 2  
 Low Cost: 100 High Cost: 200  Percent: 30  Amount

Range 3  
 Low Cost: 200 High Cost: 300  Percent: 20  Amount

4. Add the new range.
  - a. For Range 4, type **300** in the **Low Cost** field and **400** in the **High Cost** field.
  - b. Make sure **Percent** is selected and type **10**.

Range 4  
 Low Cost: 300 High Cost: 400  Percent: 10  Amount

5. Click **Save Matrix**.

Save Matrix Clear Matrix Close

6. Close the Price Matrix screen.

## Copying a Price Matrix

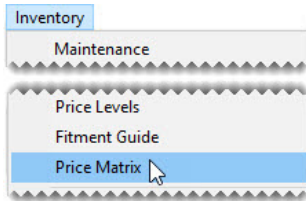
If many of the settings for an existing price matrix are similar to those that you want to assign to a new matrix, make a copy of the existing matrix and then change it as needed.

### Walk-Through: Copying a Price Matrix

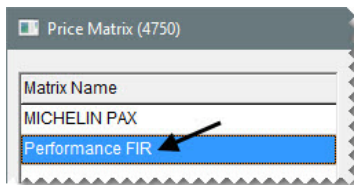
The markups you want to apply to Bridgestone tires are nearly identical to the markups for your Firestone tires. To simplify pricing these items, make a copy of the Firestone matrix and then adjust the markup percentages.

## To copy a price matrix

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



2. Select the name of the matrix you want to copy.



3. Change the matrix name to **Performance BRI**.



4. Change the range percentages to the following:
  - ♦ For Range 1, type **35**.
  - ♦ For Range 2, type **25**.
  - ♦ For Range 3, type **15**.
  - ♦ For Range 4, type **5**.
5. Click **Save Matrix**. The name of the new matrix is added to the list.



## Deleting a Price Matrix

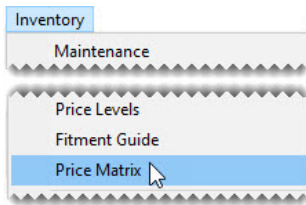
When you no longer use a price matrix, you can delete it. When a matrix is deleted, it is also removed from any items it was assigned to.

### Walk-Through: Deleting a Price Matrix

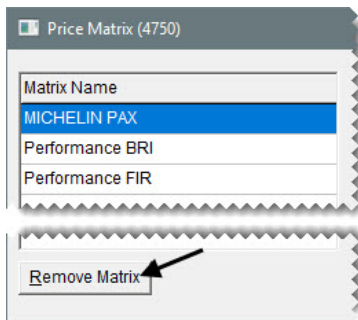
Remove the Michelin price matrix.

## To delete a price matrix

1. If the Price Matrix isn't already open, select **Price Matrix** from the **Inventory** menu. The Price Matrix screen appears.



2. Select the name of the Michelin matrix, and click **Remove Matrix**. A confirmation message appears.



3. Click **Yes**. The matrix is deleted.
4. Close the Price Matrix screen.

# Calculating Commissions

TireMaster calculates employee commissions based on a variety of preset values arranged in a grid. This appendix includes the following sections:

- ◆ [“Commission Overview” on page 215](#)
- ◆ [“Creating Commission Codes” on page 215](#)
- ◆ [“Customer Commission Types” on page 216](#)
- ◆ [“Inventory Commission Types” on page 217](#)
- ◆ [“Commission System Controls” on page 218](#)
- ◆ [“Setting Up a Commission Matrix” on page 220](#)
- ◆ [“Calculating Commissions for Payroll” on page 222](#)

## Commission Overview

TireMaster uses a grid called the Commission Matrix to calculate employee commissions. You can set up a Commission Matrix for each employee.

The Commission Matrix includes the following:

- ◆ Customer commission types (listed down the left side)
- ◆ Inventory commission types (listed across the top)
- ◆ Commission codes (also called commission matrix codes, contained in the cells of the matrix)

To calculate a commission for a sale, TireMaster looks at the code entered in the spot on the matrix where the customer’s commission type meets the commission type for the items sold. In other words, the amount of commission calculated depends on the type of customer and the type of items involved in a sale.

## Creating Commission Codes

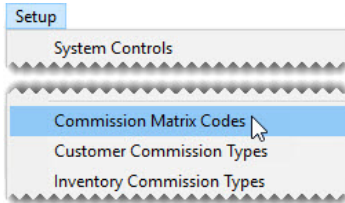
With commission codes, you can define the rate of commission to pay employees depending on the role (mechanic or salesperson) they play during a sale. Commission codes are assigned in the employee commission matrix.

## Walk-Through: Creating a Commission Matrix Code

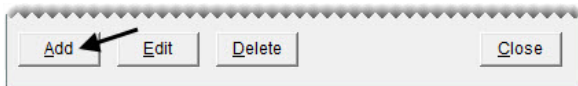
Set up a commission matrix code for your senior mechanics based on gross sales. In your shop, senior mechanics earn 40% of labor. If a second mechanic helps with the job, that person's rate is 50% of the senior mechanic's commission.

### To create a commission code

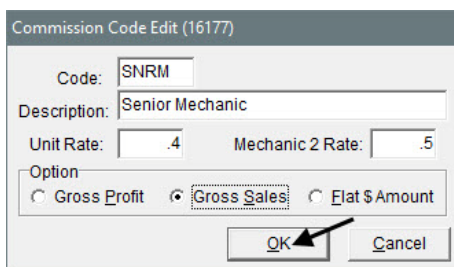
1. From the **Setup** menu, select **Commission Matrix Codes**. The Commission Codes screen appears.



2. Click **Add**. The Commission Code Edit screen appears.



3. Define the code and how the commission will be calculated.
  - a. For the code type, **SNRM**.
  - b. For the description, type **Senior Mechanic**.
  - c. For the unit rate (the amount the primary mechanic earns), type **.4** (40% in decimal form).
  - d. For the mechanic 2 rate, type **.5** (for 50% of the senior mechanic's commission).
  - e. Select **Gross Sales**.
4. To save the new commission code, click **OK**.



5. Close the Commission Codes screen.

## Customer Commission Types

Customer commission types are another component of the commission matrix. Customer commission types let you control how much commission is paid depending on the type of customer to whom an item or

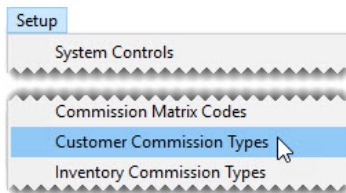
service is sold. Once you have created customer commission types, you need to assign them to your customers.

## Walk-Through: Creating Customer Commission Types

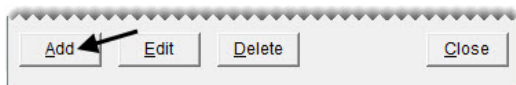
Create customer commission type code 3 for employee sales.

### To create a customer commission type

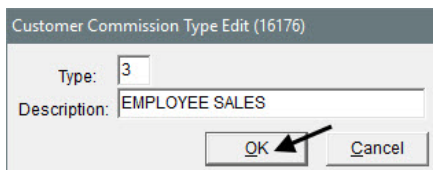
1. From the **Setup** menu, select **Customer Commission Types**. The Customer Commission Types screen appears.



2. Click **Add**. The Customer Commission Type Edit screen appears.



3. For the code, type the number **3**.
4. For the description, type **Employee Sales**.
5. Click **OK**.



6. Close the Customer Commission Types screen.

## Inventory Commission Types

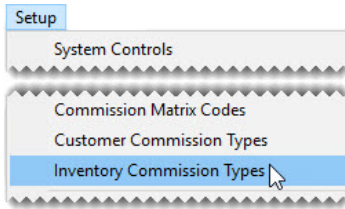
The third component of a commission matrix is the inventory commission type. Inventory commission types let you control how much commission is paid depending on the type of item sold. Inventory commission types need to be assigned to inventory items.

## Walk-Through: Creating Inventory Commission Types

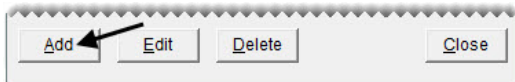
Create inventory commission type code C. This type code will be assigned to labor items.

## To create an inventory commission type

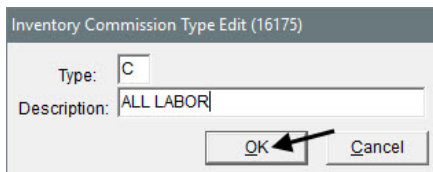
1. From the **Setup** menu, select **Inventory Commission Types**. The Inventory Commission Types screen appears.



2. Click **Add**. The Inventory Commission Type Edit screen appears.



3. In the **Type** field, type the letter **C**.
4. In the **Description** field, type **ALL Labor**.
5. Click **OK**.



6. Close the Inventory Commission Types screen.

## Commission System Controls

Once you've finished setting up commission codes and types, you can define the commission defaults in System Controls. TireMaster uses the default settings when customers, inventory items, or users do not have a commission code or type assigned to them.



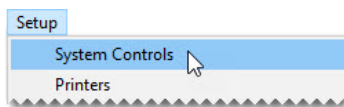
## Walk-Through: Setting the Commission System Controls

Update the commission controls by assigning the following defaults:

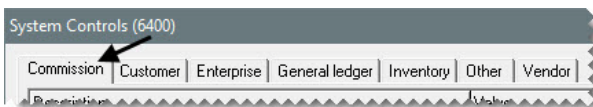
- ◆ Set the most recent commission cutoff date to a month prior to today.
- ◆ Set the default commission matrix code to ZZZZ
- ◆ Set the default customer commission type to 1
- ◆ Set the default inventory commission type to A
- ◆ Set the default commission matrix to ZZ-Commission Template

### To set the commission system controls

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



2. Make sure the **Commission** tab is selected.



3. Set the commission cutoff date.
  - a. Select **Commission Cutoff Date - Most Recent**, and press **Enter**.
  - b. Set the date to a month prior to today, and click **OK**.
4. Set the default commission matrix code.
  - a. Select **Default Commission Matrix Code**, and press **Enter**. The Commission Codes screen appears.
  - b. Select **ZZZZ - Non Commission**, and click **OK**.
5. Set the default customer commission type.
  - a. Select **Default Commission Type - Customer**, and press **Enter**. The Customer Commission Types screen appears.
  - b. Select type 1 (for regular sales), and click **OK**.
6. Set the default inventory commission type.
  - a. Select **Default Commission Type - Inventory**, and press **Enter**. The Inventory Commission Types screen appears.
  - b. Select type A (for tires and wheels), and click **OK**.
7. Set the default employee commission matrix.
  - a. Select **Default Employee - Commission**, and press **Enter**.

- b. On the User List, clear the **Local Users Only** check box. Then select the user **ZZ-Commission Template**, and click **OK**.

User List (4800)

Active Users  Local Users  Mechanics Name Search: ZZ-Commission Tem

| Id    | Name                         | Site # | Employee # |
|-------|------------------------------|--------|------------|
| JB    | Buckman, Jenny               | 1      | 14         |
| JE    | Edwards, Jerry               | 1      | 5          |
| Admin | ZZ - TireMaster System Admin | 1      | 2          |
| Comm  | ZZ-Commission Template       | 1      | 12         |

Add Edit Inactivate Security OK Cancel

8. Close the System Controls screen.

System Controls (6400)

Commission Customer Enterprise General ledger Inventory Other Vendor

| Description                            | Value                   | SiteNo |
|--|-------------------------|--------|
| Adjust National Commissions            | NO                      | 1      |
| Adjust National Commissions Threshold  | 5.00                    | 1      |
| Commission Cutoff Date - Most Recent   | 2017-12-31 23:59:59.999 | 1      |
| Default Commission Matrix Code         | ZZZZ                    | 1      |
| Default Commission Type - Customer     | 1                       | 1      |
| Default Commission Type - Inventory    | A                       | 1      |
| Default Employee Commission Matrix     | Comm                    | 1      |
| Sales Spiff - Customer Type to Exclude |                         | 1      |

Corporate Controls  Store Controls  Apply Changes To All Stores Close

## Setting Up a Commission Matrix

Once you have created commission codes and types, you can set up a commission matrix for each employee. The matrix is a grid that lets you assign a specific commission rate to different combinations of customer and inventory types. TireMaster uses these settings to calculate commissions.

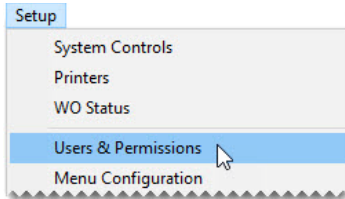
**Tip:** You can reduce the amount of time needed to set up commission grids by copying another user's matrix into the one you're setting up or by designing a commission matrix template that can be used to create new employee matrixes.

## Walk-Through: Setting Up a Commission Matrix

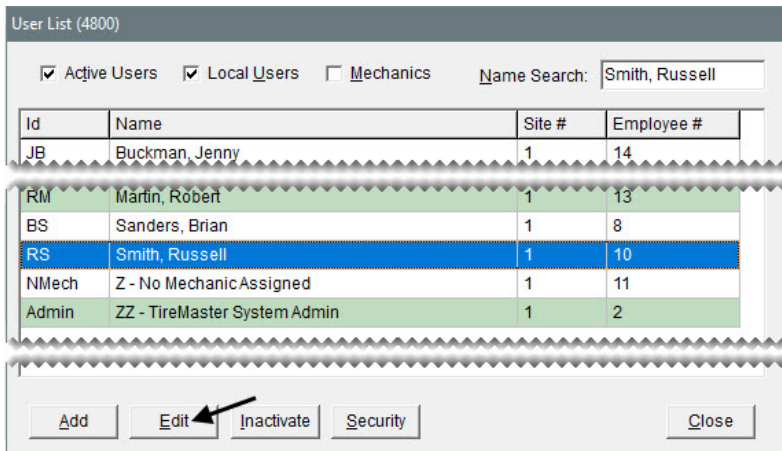
Update the commission matrix for mechanic Russell Smith. He receives the basic mechanic rate (Mec1) for labor performed for regular customers, commercial customers, and employees. For all other sales, he receives no commission.

### To set up a commission matrix

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




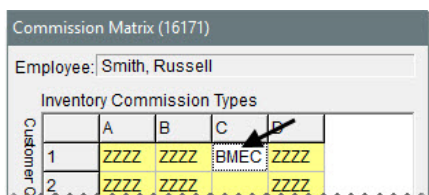
2. Select Russell Smith, and click **Edit**. The Employee/User Edit screen appears.



3. Click **Commissions**. The Commission Matrix screen appears.



4. Assign the basic mechanic code for labor performed for regular customers.
  - a. Click the cell where the row for customer commission type 1 (regular customers) and the column for inventory commission type C (labor) meet.
  - b. Press  and select Basic Mechanic from the list that appears. The code BMEC is added to the matrix.



- Assign the basic mechanic code (BMEC) for labor performed for commercial customers and employees. Enter the code BMEC in the cells where inventory commission type C meets the rows for customer commission types 2 and 3.

Commission Matrix (16171)

Employee: Smith, Russell

| Inventory Commission Types |   | A    | B    | C    | D    |
|----------------------------|---|------|------|------|------|
| Customer Commission Types  | 1 | ZZZZ | ZZZZ | BMEC | ZZZZ |
|                            | 2 | ZZZZ | ZZZZ | BMEC | ZZZZ |
|                            | 3 |      |      | BMEC |      |

- Assign the code for no commission to the remaining cells in the matrix.
- To save the maxtrix, click **OK**. The Employee/User Edit screen appears.

Commission Matrix (16171)

Employee: Smith, Russell

| Inventory Commission Types |   | A    | B    | C    | D    |
|----------------------------|---|------|------|------|------|
| Customer Commission Types  | 1 | ZZZZ | ZZZZ | BMEC | ZZZZ |
|                            | 2 | ZZZZ | ZZZZ | BMEC | ZZZZ |
|                            | 3 | ZZZZ | ZZZZ | BMEC | ZZZZ |
|                            | 4 | ZZZZ | ZZZZ | ZZZZ | ZZZZ |

Copy    OK    Cancel

- Close the Employee/User Edit and User List screens.

## Calculating Commissions for Payroll

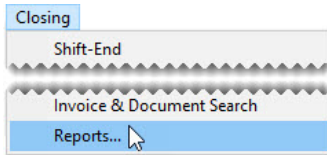
The Commission Report shows you commission and spiff calculations for each employee. A few days before the end of each pay period, you might want to print the Commission Report and review it with your employees. If there are discrepancies, you can change commission percentages before the end of the pay period. Once you're satisfied with the calculations, you can lock the commissions for the pay period. Once the commissions are locked, they cannot be changed.

### Walk-Through: Generating a Commission Report

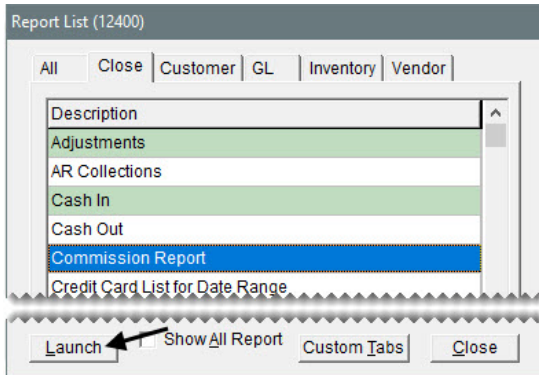
You need to send payroll to the company that processes your paychecks. Generate the Commission Report, so you can include employee commissions on the paychecks. Generate a detailed report of unlocked commissions that includes both national-account and government-support sale information. Once you've printed and reviewed the report, save and lock the commissions.

## To generate a Commission Report

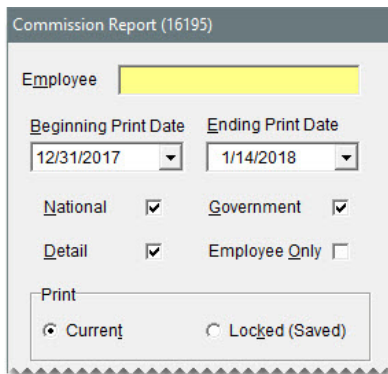
1. From the **Closing** menu, select **Reports**. The Report List appears.



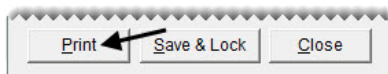
2. Select **Commission Report**, and click **Launch**. The Report Option screen appears.



3. Set parameters for generating the report.
  - a. Leave the beginning date alone, and set the ending date to today's date.
  - b. To include national-account and government-support sales, select the **National** and **Government** check boxes.
  - c. To list items sold on the report, make sure the **Detail** check box is selected.
  - d. To generate information about unlocked commissions, make sure **Current** is selected in the **Print** area.



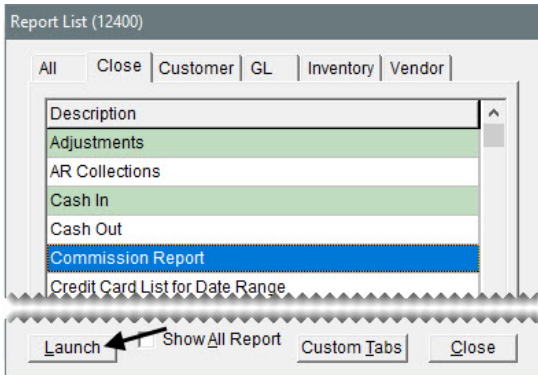
4. Print the report.
  - a. Click **Print**. The Report Window opens.



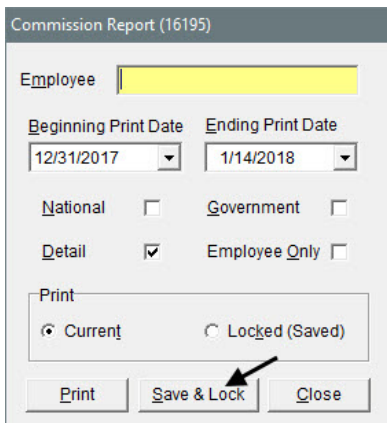
- b. Print the report, and close the Report Window.

**Note:** If the report doesn't show a commission amount for an item, you need to make sure an inventory commission type was assigned to that item.

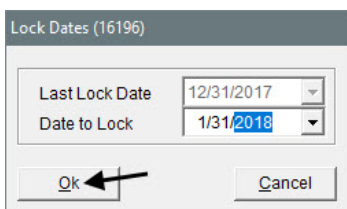
- c. Leave the Report List open.
5. Lock the commission calculations.
  - a. On the Report List, make sure Commission Report is selected. Then click **Launch**.



- b. Click **Save & Lock**. The Lock Dates screen appears.



- c. Change the date to lock to today's date, and click **OK**. The following message appears:



“This will permanently associate the current commission settings with the invoice activity for the current period. This action is not reversible! Are you sure you want to save and lock the current commission period?”

6. Click **Yes**.
7. Close the Commission Report and Report List screens.

# Going-Online Checklist

This appendix includes a checklist that you can use to track your progress during the going-online process. You might want to make a copy of this checklist and keep it near your computer, so you can cross off tasks when you complete them.

## Going-Online Steps

### Getting Started

- 1. Change the system administrator's password.
- 2. Implement daily backups.
- 3. Set up printers and documents.
  - a. On each computer, assign a printer to each of the document types.
  - b. On each computer, set the form text length.
  - c. Design work orders, invoices, and statements.
- 4. Review the startup database settings.
- 5. Enter site information.

### Building Blocks

- 6. Set up manufacturer codes.

## Building Blocks

- 7. Prepare to collect sales tax.
  - a. Update the startup tax rate.
  - b. Create new tax rates.
  - c. Update the startup tax level.
  - d. Create new tax levels.
  - e. Define how sales tax is collected.

## Users & Security

- 8. Set up users.
- 9. Implement security measures.
  - a. Add and rename security groups.
  - b. Assign permissions to the security groups.
  - c. Assign reports to the security groups.
  - d. Assign employees to the security groups.

## Inventory

- 10. Set up categories and groups.
  - a. Add and update inventory categories.
  - b. Add inventory groups to items.
- 11. Customize the Custom Inventory Lookup screen.
- 12. Set up noninventoriable items.
- 13. Set up add-ons.
- 14. Set up inventoriable items.

## System Controls

- 15. Set the system controls.



## Customers

- 16. Set up customer types.
- 17. Set up customers and vehicles.
  - a. Add each new customer.
  - b. Add vehicles for the new customers.
  - c. Set payment terms for customers with in-store charge accounts.
- 18. Set up credit cards.
  - a. Create a customer record for each credit card company.
  - b. Create credit card codes.

## Vendors

- 19. Set up vendors.

## Testing & Training

- 20. Validate the database.
- 21. Check the system's settings.
- 22. Test with the practice program.
  - a. Put a copy of your data in the practice program.
  - b. Perform transactions in the practice program.
  - c. Conduct live tests.
- 23. Train employees.

## Going Live

- 24. Enter accounts receivable beginning balances.

## Going Live

- 25.** Enter the startup inventory.
  - a.** Take a physical count.
  - b.** Set minimum and maximum stocking quantities for each item.
  - c.** Create a startup purchase order.
  - d.** Receive and price the items on the startup purchase order.
  
- 26.** Perform the shift-end and day-end close.
  
- 27.** Perform a statement cutoff.

# Beginning Balances

The TireMaster going online process includes setting up inventory items, customers, and vendors in the TireMaster database. When all of these setups are finished, you need to establish the beginning balances for your inventory and customers. This appendix includes the following:

- ♦ [“Startup Inventory” on page 229](#)
- ♦ [“Accounts Receivable Beginning Balances” on page 230](#)

## Startup Inventory

Entering the startup inventory establishes quantities for the items you sell, and it lets you enter the starting value of your inventory in the general ledger. To enter your startup inventory, complete the following steps:

1. Take a physical inventory count.

Print one or more counting decks and write down the quantity available for each item. Because your startup inventory will be based on the physical count, the quantities you enter in TireMaster might differ from the quantities in your previous system.

2. Use the numbers from the physical count to set stocking levels.

When the physical count is finished, you'll enter the quantity for each item in TireMaster. For this step, open Inventory List Editing. Then enter the numbers from the physical count in the **Min Qty** column, and make sure the maximum quantity for all items is zero. Establishing stocking levels enables TireMaster to calculate quantities for the startup purchase order.

After you go live, you need to return to Inventory List Editing and set your minimum and maximum stocking levels to the values that you'll normally use to reorder items.

3. Create and complete a startup purchase order.

The startup purchase order is used to enter the quantities and value of your inventory in TireMaster. The startup PO is actually a suggested reorder that uses the numbers from the physical count, entered as minimum quantities in Inventory List Editing.

When you create the startup PO, use the system vendor for quantity adjustments (ZZ-Inventory Qty Adjust). When you're done creating the startup PO, receive and price the items on it.

# Accounts Receivable Beginning Balances

Customer balances from your previous system are entered with the Customer Balance - Startup Utility, which is referred to as Cbal. Entries generated with Cbal post to account 3999–100 (Startup Accounts Receivable) for you automatically.

Entering a customer's beginning balances results in the following:

- ◆ A debit posts to the general ledger's accounts receivable account.
- ◆ A debit posts to the customer's subledger account.
- ◆ A credit offset entry posts to the account 3999–100 (Startup Accounts Receivable).

When entering customer beginning balances, use one of the following methods:

- ◆ Enter the lump sum of each aging breakdown, such as future, current, or 1–30.
- ◆ Enter each payment owed to you. For example, if a customer has four invoices and is set up for two payments on each invoice, you would add eight journal entry lines.

You can get the beginning balances from your previous system's customer balance report (or its equivalent).

**Note:** The Cbal utility is to be used only for the purpose of entering beginning customer balances during the going online process.

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