

10. Tips & Techniques

This chapter is dedicated to providing you with updated solutions to some of the most common "how to" questions we receive from our users. By sharing these inquiries and their solutions with other users, Blue Ridge POS, LLC hopes to enhance your knowledge of the POS Linker business system. Blue Ridge POS, LLC will send out updates to this chapter so that you may continually add them to your manual for future reference.

Frequently Asked Questions

1. How do I enter parts that we will not track inventory quantities of?
(ex. Small sales of lengths of rope, chainsaw chain, or fuel line which are bought in rolls but sold cut.)

One method is to make up a part number for the item. Install it in inventory on the Inventory Control, Parts, Inventory file screen. Go to the on hand quantity field and fill it with nines. By filling this field with nines POS Linker knows never to deduct any of this part number from inventory, however it will track sales of this part. Also see question three about shop supplies.

2. How does the program handle parts going onto repair tickets?
When do we take the part out of inventory?

Parts being allocated to repair tickets should be entered on the repair ticket when they are pulled from inventory. The computer will automatically treat the part as if it had been sold, removing it from visible inventory. When the service order is processed the part sale will be posted in the general ledger.

3. How do I sell shop supplies used in service orders? (i.e. grease, nuts, bolts, etc.)

Shop supplies should be treated as regular parts items with a part number such as *SS* for shop supplies. You will have to decide on the appropriate number and then create it in inventory. Give this number an unlimited quantity so inventory tracking is handled totally by the computer and reorders are not based on individual parts sales. Some dealers do something similar to handle the costs associated with recycling oil, antifreeze, batteries and other hazardous waste products.

4. How do I make a parts memo appear on the screen?
Can this memo be printed on the invoice?

The memo may be added to any part by going to the Inventory Control, Parts, Inventory File screen. This memo can be made to appear on either the screen when the part number is entered, or on an invoice, or both. This is accomplished by selecting either a "Y" or "N" in the two fields following the memo field.

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5. How are the prices frozen on parts?

Does this price adjust when new price lists are loaded?

Prices are frozen on the Inventory Control, Parts, Inventory File screen in the Indicators section. In the Freeze field type an F to freeze or leave it blank to unfreeze. The default is unfrozen. Parts marked with an F are price updated with new price lists, however, the prices on the inventory record are not changed. A list of frozen parts can be printed during "Price Data Import".

6. Can the cash drawer be opened without using a key or processing a sale?

Yes, the salesman can enter the password (initials) at the invoicing screen, then select Open Cash Drawer in the menu. Also allows this function to be password protected even further.

7. What needs to be done at month's end?

There are many chores that should be accomplished at month's end depending on which modules are running. *See Chapter 9 for more details and checklists.*

8. How do I process Manufacturer rebates on wholegoods?

Through the Invoicing screen, on a complete good invoice. Skip the tag number, and simply enter "Rebate" under model. Your quantity will equal (-1), and will be a non-stock item. Enter the rebate amount as negative. List price = Dealers rebate amount to the customer, Cost = Manufacturer rebate to the Dealer.

9. How can I exempt certain customers from receiving statements?

On the Customer Information screen, under Demographics, you may enter a predefined code in the Industry field. For example:

- 01 = Customers who pay by invoice
- 02 = Write offs


On the statement screen, before processing, you may enter as many as five Industry codes for exemption.

10. How can I put service order #s on statements?


When processing the service invoice, simply type in the service order # in the PO# field. You may type in both numbers if needed. Whatever is typed in that field will appear on the statements.

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11. How do I change a Manufacturer code?


Under Complete Goods, Complete Goods Manufacturer Division screen, you must create the new division control record by entering all information for the new manufacturer. If you are linked to GL, you should use the same GL account as the original file. You must then correct each and every tag number from the original file with the new manufacturer and make. This is done on the Complete Goods, Inventory File screen. Once all new information has been entered and saved, pull up the original file with the undesired code and hit  to delete.

For Parts:

- a) Setup the new manufacturer code you wish to use.
- b) Select "Utilities" menu function under the Parts4profit submenu, and choose "Change Manufacturer code".
- c) Enter the old manufacturer code and the new manufacturer code you wish to change to. Press  to begin.
- d) Once this process is complete, return to the Parts Manufacturer Division screen, delete the old manufacturer division.

12. How can I adjust my cost or list prices on a particular manufacturer?



An example of this need would be if a manufacturer made a 10% price increase of all parts across the board, but did not issue a price file update.

- a) Under the Parts4profit menu, select Utilities
- b) Select option #1, Adjust Price list.
- c) Enter the manufacturer code
- d) Basis = (C) - your change is based on your cost
- e) Affect = (C) - you will be affecting cost by this procedure
- f) Sign = (P) - this is a positive (adding 10%) adjustment
- g) Markup = 10 (10% increase)
- h) Limit = 99999 - this will ensure that all part numbers are affected
- i) Press  to begin **You may want to run the same procedure a second time on (L)ist prices**
- j) Once this process is complete, do a Price Data Import to change all inventory records.

*****It is always a good idea to have your latest price update floppy from BRC on hand in the event a mistake is made during the procedure*****

13. How do you make all Used Goods tax exempt?

Under the Complete Good Manufacturer Division screen, enter your manufacturer code for Used Equipment/Goods (ex: UG, UE). Enter through to "Tax" field and press

, select the tax code for tax exemption and press  to save.

Suggestion Form: fax to BRPOS, LLC at (540)543-3176

Please copy and use this page to mail or fax suggestions to Blue Ridge POS,LLC. We take your suggestions seriously and are always striving to improve POS LINKER. By using this form for suggestions, support questions or to report suspected software bugs we can better track and respond to your needs.

Company Name: _____

Contact _____

Address _____

City_____ **State**_____

Phone (____) ____ - ____

Fax (____) ____ - ____

Please check the appropriate box and explain below: (include any screen prints or other paperwork)

- Suggestion for enhancement in future versions
- Suspected software bug
- Support or documentation question
- Other

Please explain:

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NOTE: Blue Ride POS, LLC is continually adding new vendor price lists. If you need one and do not see it on our lists we may already have it or we will assist you in obtaining one and loading it on your computer. Some price lists require special dealer certification and may only be available to certain authorized dealers. Please check with Blue Ridge POS,LLC if you have any other questions.

Power Equipment

- AMF (NOMA) Lawn Chief Stens
- Ariens Little Wonder Stihl
- BCS Makita Sunbelt
- Briggs & Stratton Maruyama Tanaka
- Coleman McCulloch Tecumseh
- Cub Cadet MTD Tillotson
- Cushman Murray Toro
- Dixon Olympic Toro Comm.
- Echo Onan Tucker/Rocky
- Exmark Oregon Walbro
- Foote PLP-Foley Wisconsin
- Garden Way Polaris Woods
- Gates Poulan Yanmar
- Generac Power King Yazoo
- Grasshopper Ransome Zama
- Gravely Red Max
- Green Machine Robin
- Homelite Roper/AYP/Yard Pro
- Honda Rotary
- Husqvarna Ryan
- Ingersoll Sachs-Dolmar
- John Deere Scag
- Jonsered Shindaiwa
- Kawasaki Silver Streak
- Kohler Simplicity
- Lawnboy Snapper

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Agricultural

- Bob Cat
- Bush Hog
- Case IH
- Deutz Allis
- Fiat Tractor
- Gleaner
- Hesston
- Kioti
- Krone
- Kubota
- Massey Ferguson
- New Holland
- Riverside
- Tisco
- White -New Idea

Motorcycle

- Motorcycle Stuff
- Parts Unlimited
- Tucker/Rocky
- Yamaha
- Tomos
- Suzuki
- Tigershark

Other Industries

- Black & Decker
- Makita
- Pennington Seed
- Sentry Hardware
- Thompson Electron
- Watters & Martin
- Wetsel Seed
- Wolverine

Compatible Software



































The following software systems are compatible with POS Linker, however, Blue Ridge POS, LLC does not support these systems. If you have questions regarding the purchase and/or installation, please feel free to call.

- PartSmart
- Pal
- Peachtree Accounting
- Microsoft Office

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Quick NOTES:



























Complete this task list between the 25th and 31st of the month:

1. Print Service Order Report. (Service Labor, , ,  or , , , )
2. Everyone log off the system. (Escape to “black screen”, , ,  or “POTS” out.)
3. Print closing daily sales report. (Point of Sale, Report, , )
4. Reboot to DOS (, , ) (on boot menu arrow up, )
5. Update training area (, , )
6. Back-up! Back-up! Back-up! (, , Month End Full Backup, “any key”)
7. Run Scandisk (, , ,  Scandisk, )
8. Run Defrag ( Defrag, Read screen, “any key”)
9. Exit to “black screen” ( Exit)
10. Re-boot to REAL/32 ( +  + , )
11. Rebuild Files (, , All Files, Read screen, “Any key”)
12. Go Home!

P.O.S Linker - Closing Procedures (Standard Version – A/R & G/L on 31st)

Complete this task on the last day (31st) of the month.

(Reference Chapter 8 of the P.O.S. Linker manual for more detailed information on closing procedures.)

1. Print Service Order Report. (optional) (Service Labor, , ,  or , , , )
2. Be sure that all sales and payments to customer in house charge accounts that you want to appear on this month's billing statements have been posted.
3. Everyone off the system until the rest of this list is completed.
4. In Accounts Receivable, Balance Files. When balanced, use  to print screen,
5. Back-up (, ) if you have not already done so.
6. In A/R, Calculate Service Charges, then write down the accumulative service charges on the screen print done in step 4.
7. Print closing daily sales report. (Point of Sale, Reports, )
8. Post G/L. Reference your POS Linker to Peachtree Posting instructions for posting procedures.
9. Escape to the "black screen" and perform Monthly Accounting Save. (, , , Both Groups)
10. Archive POS accounting data when the system prompts you. (This saves a copy of G/L & A/R.)
11. In POS Linker G/L, close the period.
12. Print employee performance Month-to-date report. (POS setup, Employee File, , )
13. Reset counters to zero for the next month. (, )
14. End parts month. (, , Inventory control, , , Read Messages, )
15. Re-start imaging server. (, , )

Go Home!

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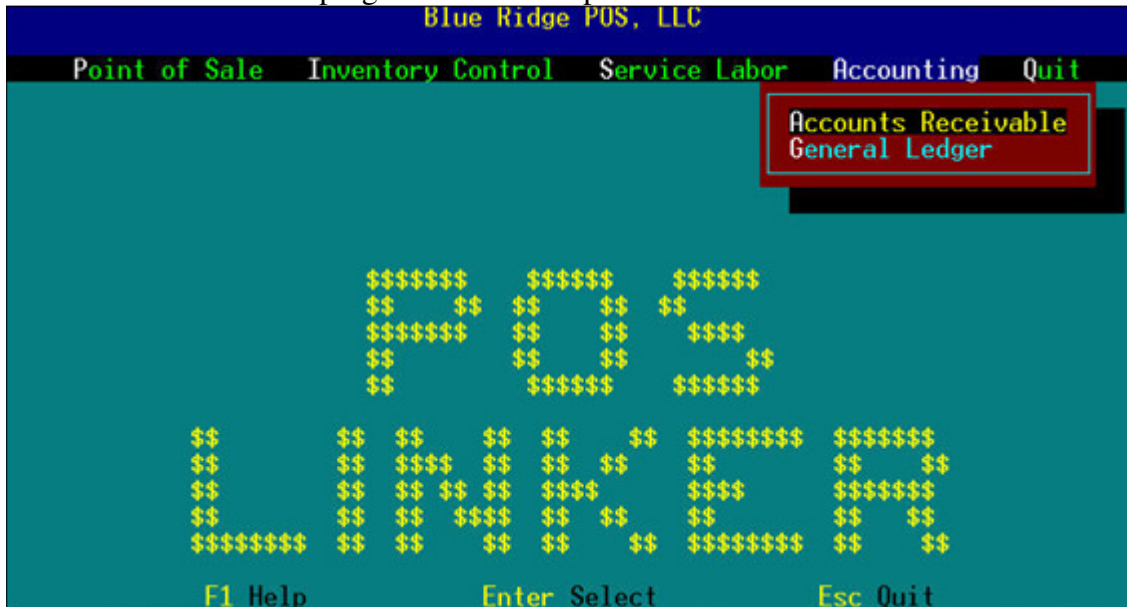
Any day in the new month.

1. To print reports (including statements) as of the previous month end:
 - A. Select previous period (Red menu).
 - B. Use Date Change to set the date desired on report (Red menu).
2. Print reports, etc.
3. Remember, each time you return to the red menu, you will have to change date again.
(This method eliminates customer record lock conflicts and allows invoicing in the new month without delay.)

Labels

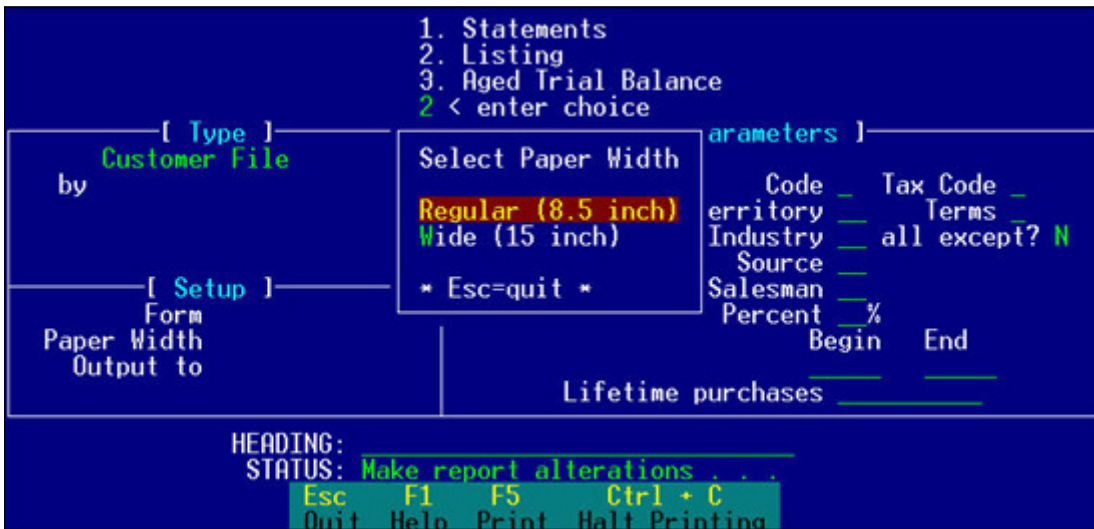
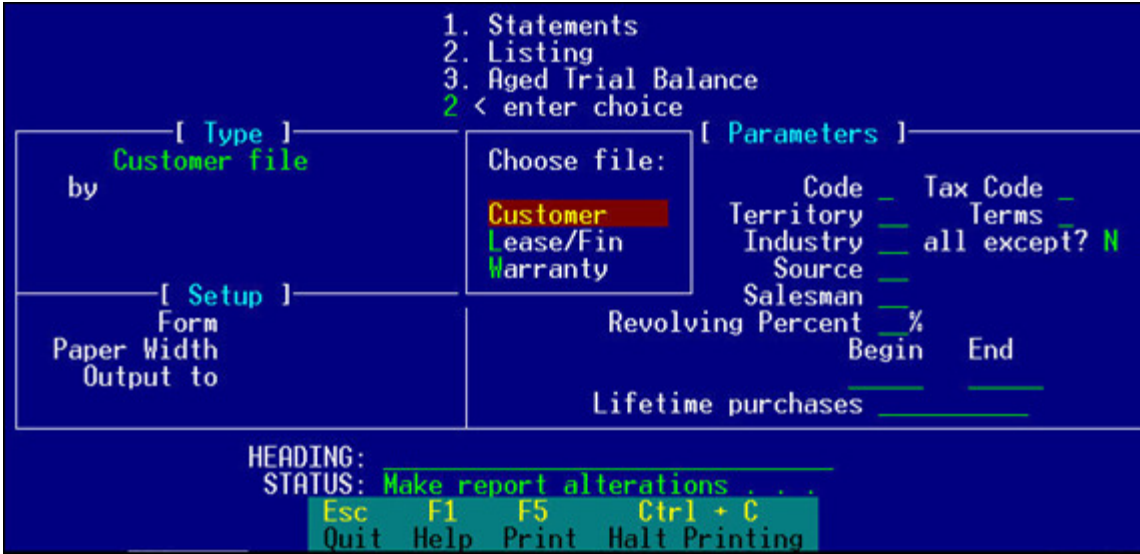
To Transfer Labels to Label Program in window

You MUST use a Label program that will import CSV or TXT files



From Reports
Choose Listing
Chose Customers

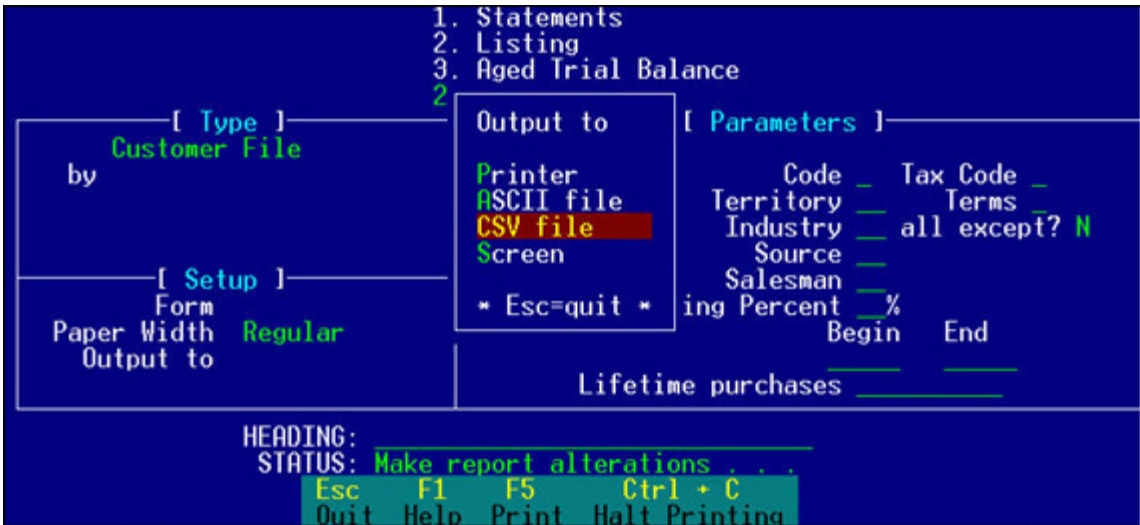
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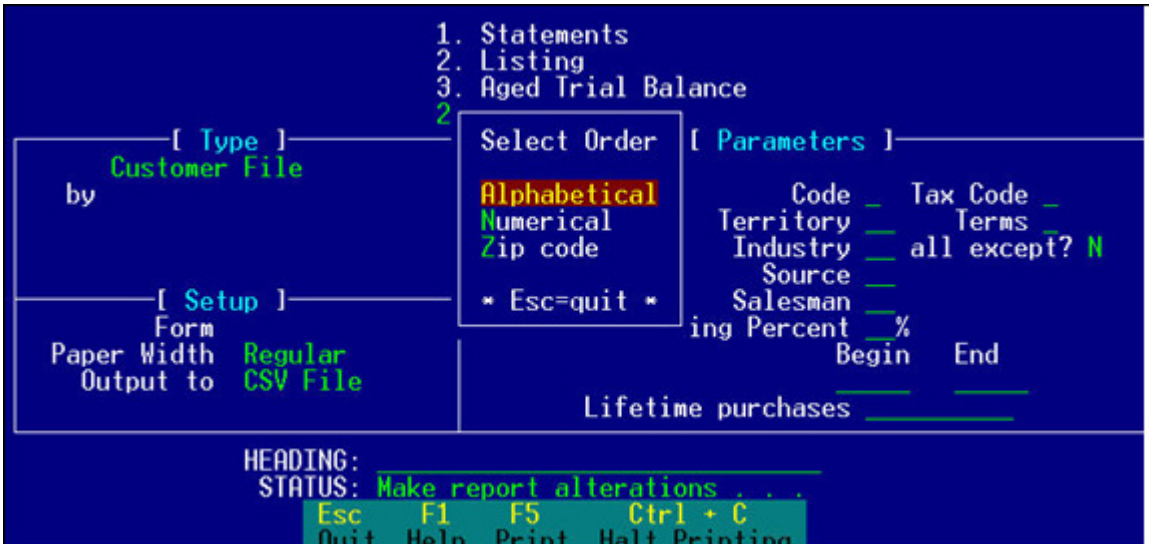
Chose Regular Paper

Chose CSV file

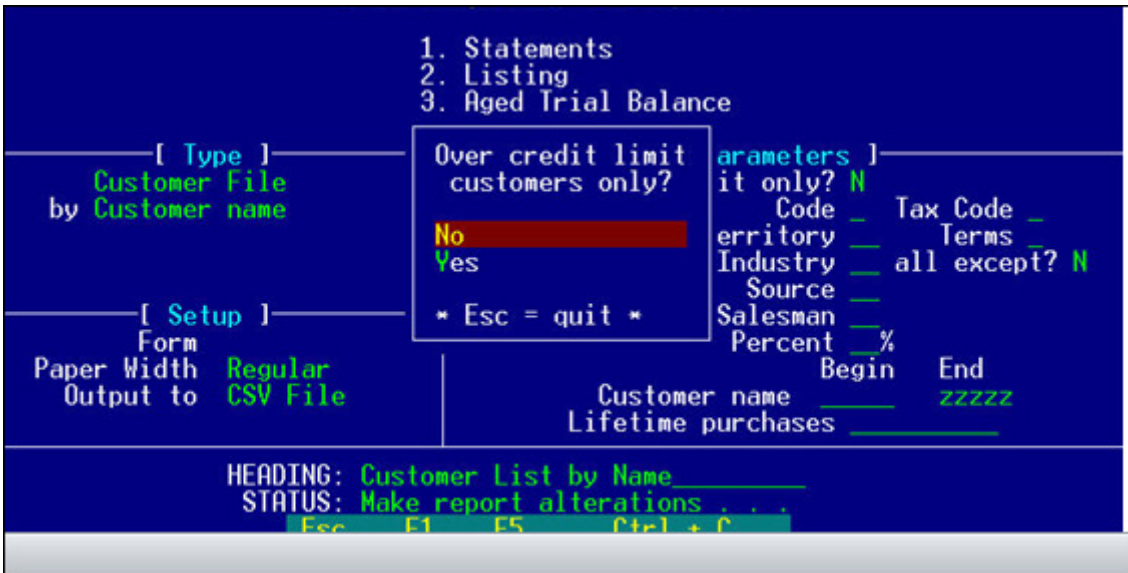
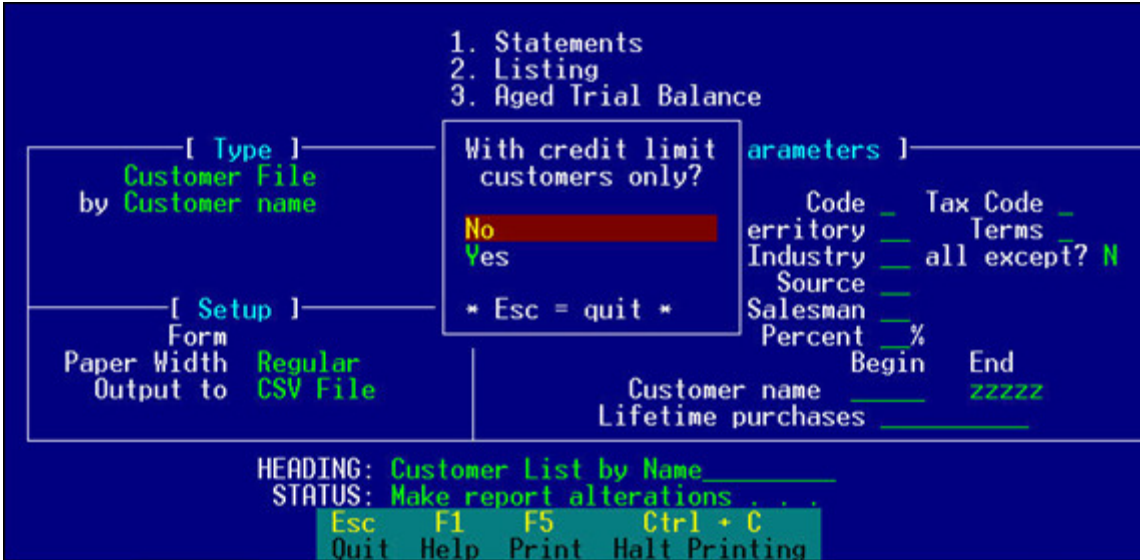
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Rename the file (leave O: and .TXT)



Choose how you want the order



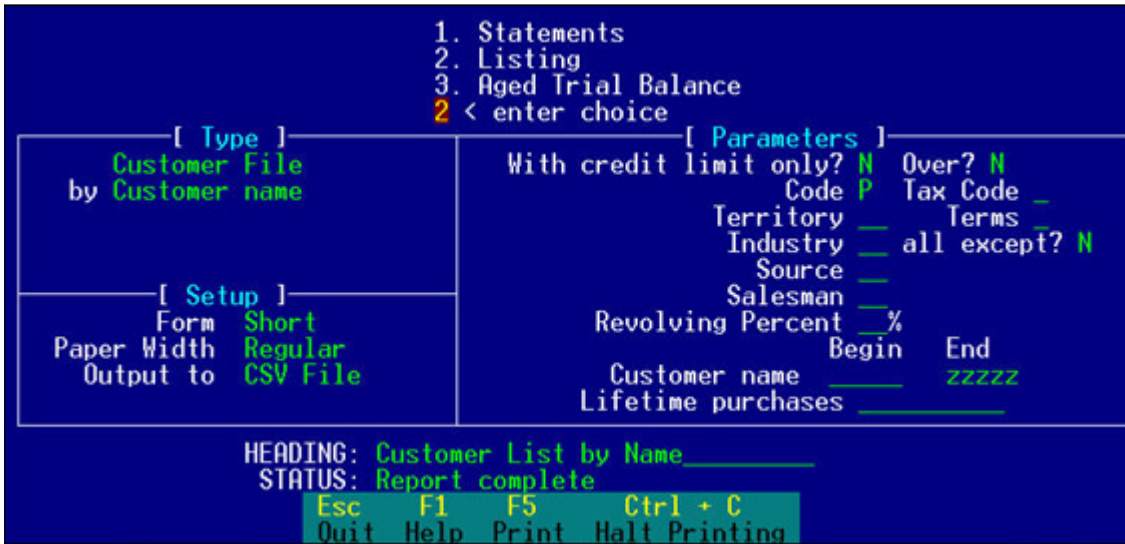
Choose parameters

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Chose Form Length and Code from your lists

Press F5



Report is complete
 Return to Black Screen



Strike a key when Ready

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```
Copy a file to a Windows PC or STN0 floppy drive

Volume in drive C is VOL 1 PART1
Directory of 0:\

          LABELS.TXT      1NAMES.TXT      MENU.TXT
10 File(s)      1375953 bytes
                  573865984 bytes free

NOTE:
The above list of TXT files exist on the 0: (C:\UTIL) drive.
Be sure the filename you are about to type exists above.
To exit, type the word "EXIT" and press "Enter".

Enter the Disk file name to copy: LABELS.TXT
```

Chose the File you wish to copy

Press Enter,

Next Screen says to strike a key when ready

Strike Key

```
The command completed successfully.

Note: Use one of the mapped network drive letters listed above.
If you have a Windows TSE server, use T ( t: = \\tse\d )

If you do NOT have a TSE server,
you will likely use one of the following letters:
U ( u: = \\stn3\d )
V ( v: = \\stn4\d )
W ( w: = \\stn5\d )
X ( x: = \\stn6\d )
Y ( y: = \\stn7\d )
I ( i: = \\stn8\d )
J ( j: = \\stn9\d )
K ( k: = \\stn10\d )
S ( s: = \\stn11\d )

OR

A ( A: = floppy drive on STN0 Real32 Terminal Server / POS Linker Server )

To exit this routine, type EXIT and press Enter

Enter the Drive Letter to Copy TO:
```

Chose the stn number you wish to send the file to.

Retrieve file from the root of the D: drive or Shared drive on the windows computer

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Move that file to location on your Windows computer that will be easy to open in your Label Program (My Documents etc)

Follow the Instruction for your Label Program; Remember the program must import TXT or CSV files

