

3. Point of Sale Menu

In the POS LINKER Main Menu Screen, the highlight bar is on Point of Sale and the corresponding subtopics--*Invoicing*, *Reports*, and *POS Setup* are available for selection.

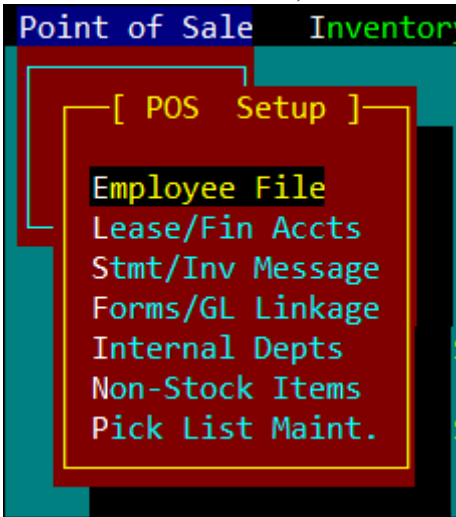


The first step in using your new system is to set up all users. These will be all employees who will be using the system. Using your arrow keys, or the letter "P", select POS Setup. This choice will pull up another menu screen. Select "Employee File". The "Employee File" will allow you to setup your employees in the system.

Some screens require employee/operator initials to open, such as the invoicing screen, and shop employees will be tracked by their initials for service/labor hours. You may enter each shop employees' service rate and code the charges under "Sold as" for invoicing by using their initials followed by "SV". For example: Employee: "John Doe" Service code: "JDSV"

POS Setup

The POS Setup screens allow the setup of the invoice, statement, general ledger accounts, special charges, and employee tracking. Generally, this area is setup during installation of the computer system and with the exception of the messages printed on the invoices and statement, seldom changes.



"Sold as" should be left blank when an employee's labor is never sold. Each time you enter a new employee, press **END** to save the information. No two employees can have the same initials. After all employees are entered, hit **ESC** to get back to the main menu. You are now ready to start setting up your system and begin utilizing POS Linker.

The "Employee Performance" screen is filled out with the names of all personnel that will use POSLinker.

05/14/2015 Version 7.1

[EMPLOYEE PERFORMANCE]

ID	Name	Sh Rate	Sold as	Tax	GL Accounts
		\$		-	/
	DEPARTMENT		Week to Date	Month to Date	Year to Date
	Complete Goods		_____	_____	_____
	Customer Parts		_____	_____	_____
	Internal Parts		_____	_____	_____
	Rental		_____	_____	_____
	Customer Service		_____	_____	_____
	Internal Service		_____	_____	_____
	Hours Clocked		_____	_____	_____
	Hours Sold		_____	_____	_____

POS Setup - Employee Performance

The sales performance of employees is tracked in different departments by the week, month and year. This feature can be used to track performance for possible incentive pay, bonuses or commissions.

To setup employees:

ID - a two character alpha field that represents an employee. Ex: JD - John Doe

Name - Type the name of the employee.

SH Rate - Enter the shop rate this employee's labor is sold as, or if this amount varies, leave blank and fill in manually on each service ticket.

Sold As - Enter the description to appear on each ticket when selling this person's labor. Anything entered in this field, enables labor sales. Persons that do not sell their labor should leave this field blank.

Tax - Enter "Y" or "N" if labor is taxable or not.

Hit  to save all information.

The rest of the fields are system maintained and will change with each invoice processed.



Employee Tracking

To initialize the tracking feature, at the Employee Performance screen

press  - menu.

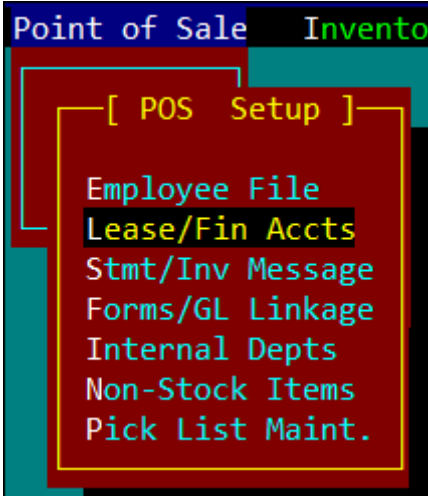
Print the desired report for your records. Once you have printed your selections, you may "close-out" your week, month or year. "Closing-out" enables you to keep an accurate running total for the week, month and year because it resets the department sales totals to zero (0).

It is a good idea to close-out your week at the *same time* every week so that each report contains the same number of days. For example, if Saturday is your last day of the week, close-out Saturday afternoons along with your regular daily closings.

It is also a good idea to close-out the last *week* of the month *with the month*. In other words, on the last day of the month, press  to close-out your week, and then press  to close-out your month. The same would be true for the end of the year. For example, you would close-out the last week of December with month close-out as well as the End of Year close-out.

Lease/Finance Accounts

Lease/Finance accounts are set up for equipment sales through the manufacturer or a leasing company. This feature can also be used if you, the dealer, wish to set up financing through the dealership. Setup your company information the same way you would any other finance company. The POS system enables you to process the sale through the finance company and retain the customer sales information as well.



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Lease / Finance Accts

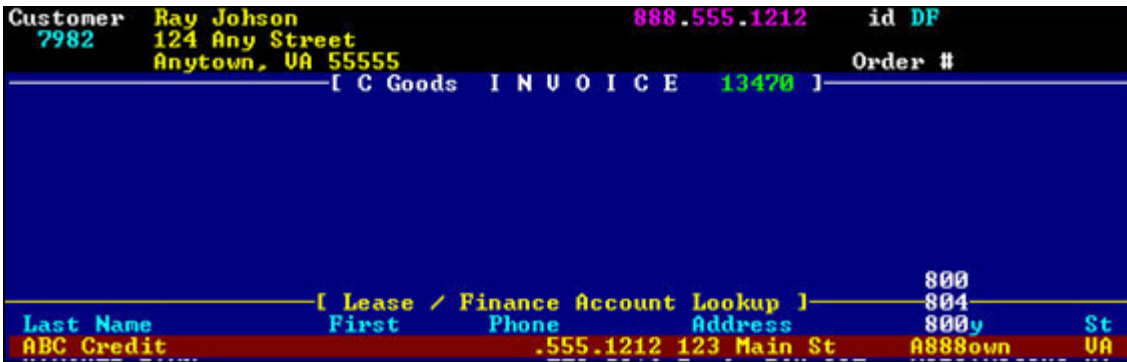
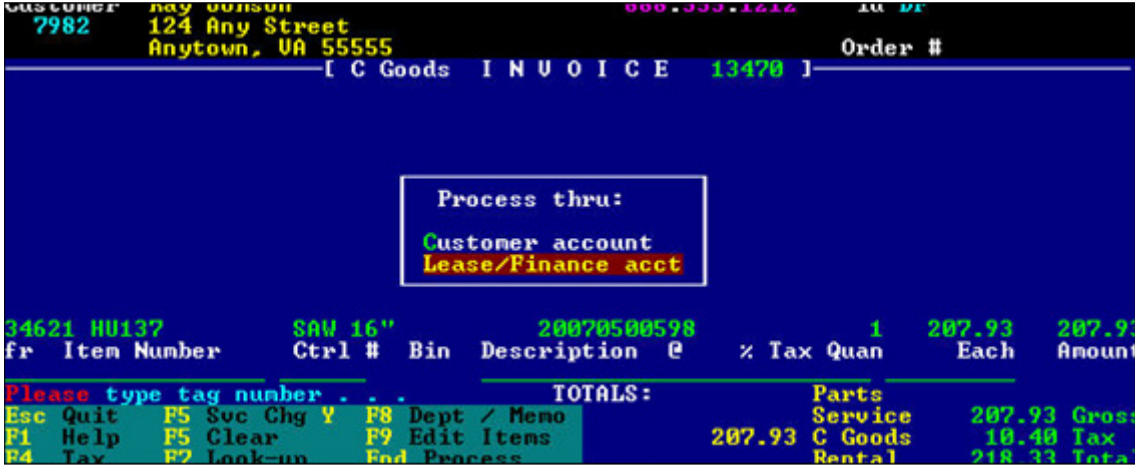
Demographic	Financial
Number <input type="text"/> SSN <input type="text"/>	Credit limit <input type="text"/>
First name <input type="text"/>	Balance <input type="text"/>
Last name <input type="text"/>	Last pay date <input type="text"/>
Contact <input type="text"/>	Last pur date <input type="text"/>
Street <input type="text"/>	Customer since <input type="text"/>
PO adrs <input type="text"/>	Life purchases <input type="text"/>
City, St <input type="text"/> , <input type="text"/> - <input type="text"/>	High credit <input type="text"/>
Phones <input type="text"/> . <input type="text"/> . <input type="text"/> . <input type="text"/> . <input type="text"/>	Terms <input type="text"/>
Category <input type="text"/> Codes <input type="text"/>	Service charges <input type="text"/> Net <input type="text"/> day
Territory <input type="text"/> Slsmn <input type="text"/>	PO required <input type="text"/>
Industry <input type="text"/> Source <input type="text"/>	Tax table <input type="text"/> % tax
eMail <input type="text"/>	eMail statement <input type="text"/>
mo: <input type="text"/> Default pmt types: Invoice <input type="text"/>	ROA <input type="text"/>
	Disp <input type="text"/>

Setup:

- a) Select Lease/Finance Accts.
- b) Enter the lease/finance company information
- c) Set Terms = Invoice and Service Charges = No
- d) Press to save

Process Lease/Finance Sale:

- a) Initialize the complete good invoice through the customer's account, At the processing screen; the system will prompt you to select the Lease/Finance account.



- b) At the Payment Breakdown window you will process the total of the sale as a "Charge" to the Finance company you selected.

If the customer put a down payment on the unit you will enter that amount in either, the check, cash or credit card field. The down payment amount will reduce the charge amount to the finance company selected.

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The following is an example of a Lease/Finance sale:



Use your arrow keys to move the down payment amount into the appropriate field. Once you have verified the payment breakdown is correct, process the invoice.

Receiving Payment on Lease/Finance:

- Open the Lease/Finance account by entering the account number or by name lookup.
- Select **F5** for menu, and choose "Payments", the payment screen will appear. System will default to current date.



c)

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Enter payment information: check #, PO ref, payment and discount amount. The system will default to the account balance as the payment amount, which you can override manually.

The screenshot shows the 'Lease/Fi Receipts' screen with the following data:

Transaction	148516	Paid from	ADVANTAGE FINANCE INC
Date	05/20/2015	Ck#	
PO Ref		Cust #	5
Amount	0.00	Disc	0.00
Applied		Payment type	0.00 balance
To apply	0.00	by Invoice	
			Total receipts \$

Below the main screen, a table header is visible: Invoice — Date — Amount — Org Amount —. A pop-up menu titled 'Choose:' contains the following options:

- Lookup invoices (highlighted)
- Process payment
- Start over

Credit Card

Note - Customer is paying off lease with another finance note - very seldom used.

A/P Clearing - this option is used when Mfr. Gives the dealer credit instead of actual funds. When an external A/P module posts to G/L, this account is cleared in this manner.

- d) Enter through to pop-up menu, choose "Lookup Invoices" - this will display a list of all invoices processed under this Lease/Finance account.
- e) Use the arrow keys to select the invoice or invoices you wish to pay. If you have more than one invoice to pay, you must repeat this process until you have all invoices listed on the payment screen totaling your check or credit amount. Again enter through to pop-up menu, and select

"Process Payment", or press .

- f) Select payment type:

Cash
 Check

- g) Once payment type is selected, the system will ask if you are ready to post the payment. Answer "Y" when everything is correct.

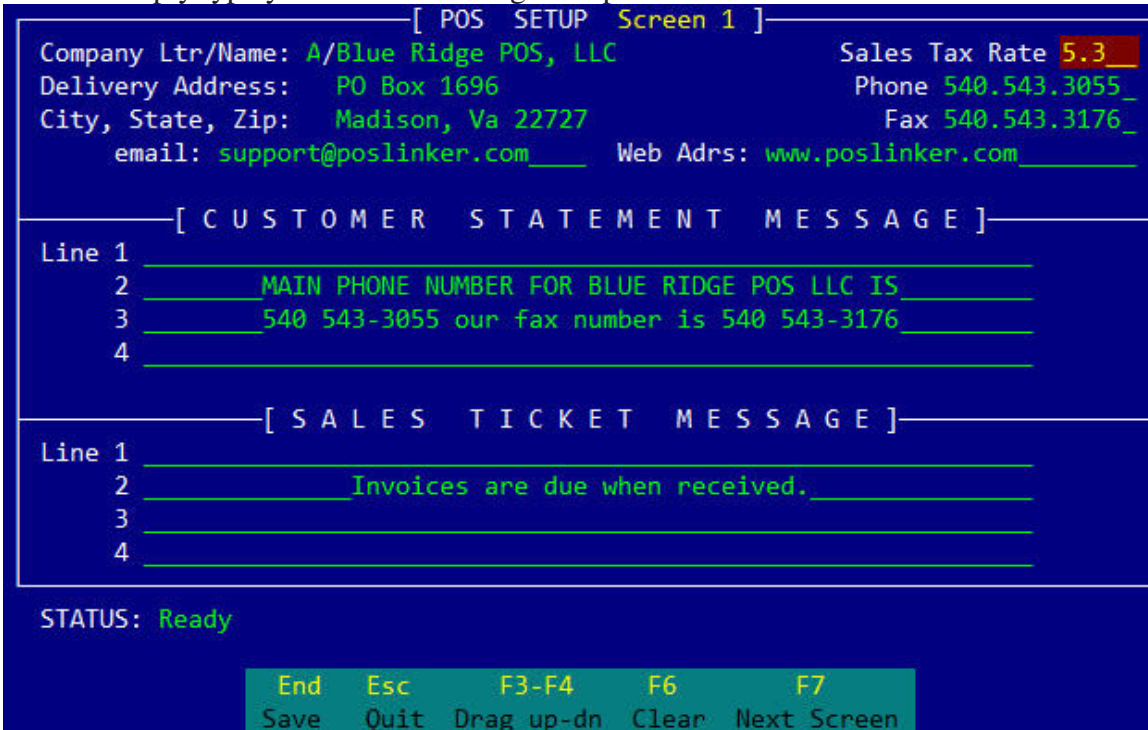
Purging/Removing Paid Invoices from a Lease/Finance Account:

From the Lease/Finance account screen, enter the account number. Press **F5**, and select "Purge paid invoices". This selection will clear all paid invoices from the account and will no longer appear on the invoice payment screen or the overview screen.



POS Setup - Stmt/Inv Message

The "Statement/Invoice Message" screen allows the message on the invoice and statements to be changed. You cannot change the company name and address on this screen. Simply type your desired message and press END to save.



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Note: The messages are very useful for communicating upcoming sales or new equipment arrivals. It is also useful to print regular statements with one message, and then change the message for printing those statements that have overdue balances.

POS Setup - Forms/GL Linkage

The "Forms" section allows you (if needed), to change the size of your statements and/or invoices. For instance, if your company decides to begin using plain paper statements, the number of print lines would change to 66. You calculate 6 lines per inch of paper. You would also use this screen to change your pre-print options for these forms. If you are linked to the "General Ledger", you will use this screen to provide the correct accounts for posting. Most of this information is filled in when setup and leads little attention after, and most entries are self explanatory.

Blue Ridge POS, LLC - POS Setup
Screen 2

[FORMS]	[GENERAL LEDGER ACCOUNTS]
Statements:	Cash on Hand 10100__
Lines 42 (6 per inch)	Accounts Receivable 10400__
Pre-printed? (Y/N/P) N	Notes Receivable .. 11100__
	Sales Tax 23000__
	Rent 61500__
Numbering System warning	Internal Parts 3699820
Parts 14315 POS	Parts Freight 3750020
Service 61615 invoicing	Warranty Parts ... 3699920
Compl Gds 381 locked!	Warranty Receivable 10500__
	After Sales Expense 7300110
Current GL Period 4_	Service Charges ... 66900__
GL Posting Period 4_	Merchandise Discnts _____
CG used tag begin 50,001	Prompt Pay Discount 75802__
	CG Disc & OverAllow 3510010
	Credit Card Sales . 10100__
	POS Parts Deposits 23900__

End Save F1 Menu F2 Display F5 Print F6 Clear F7 Next Scrn


POS Setup - Internal Departments

The "Internal Departments" can be used to setup internal billing accounts for your

Internal Departments

ID	Description	Tax	GL Account

End Save Esc Quit F2 Delete F7 Lookup F9 Next Screen

shop or parts departments. Press  to setup a new department, and END to save.

Internal Departments			
ID	Description	Tax	GL Act
SI&E	SHOP TOOLS, EQUIPMENT	Y	66000
TRSH	TRASH PICK UP	N	69400
UAES	USED AG EQUIP SETUP	N	1250010

Enter Select Esc New Pull/PgDn New Pg

Non-Stock Items

Non-Stock items could be used to set up automatic control numbers for miscellaneous items such as "Assembly", "Shipping & Handling", "Filing Fees" or "Gift Certificates". These items, or any of your choosing, can be entered automatically on invoices or complete goods inventory costs by entering the ID into the CTRL field.

Examples:

Non-Stock Items			
ID	Description	Tax	GL Act
ADU	Advertising Expense	Y	64000
AP	ACCOUNTS PAYABLE	N	24000
APCC	CASH CLEARING	N	10301
AR	ACCTS REC (SPECIAL)	N	11100
ARC	ACCTS REC EMPLOYEE	N	11300
ASAG	AFTER SALE EXP - AG	Y	64200
BD	BAD DEBT	N	68700
BDI	BUY DOWN INTERES	Y	4299510
BR&M	BLDG. REPAIRS & MAINT	Y	67000
CC	CREDIT CARD PAYMENT	N	10000
CGAR	COMPL GOODS RECEIVABLE	N	11200
CIT	CONTRACT IN TRANSIT	N	10700
CLRG	CLEARING ACCT - CASH	N	10301
COMM	COMMISSION	N	6030010
COVE	COMPANY VEHICLES	Y	67500
CR	CASH REBATES	N	4299910
D&S	DELIVERY & SETUP	N	65900
DC	WHOLEGOODS DISCOUNT	Y	4299910
DD	DIRECT DEPOSIT IN BANK	N	10000

Enter Select Esc New Pull/PgDn New Pg

The word Discount or Deposit trigger a negative 1 in the quantity field. In the Service Order Module

Quic Parts Lookup Module Instructions

Pick List Maintenance

This module allows you to create a custom parts look-up library that suits the needs of your business. It will allow you to enter a make, model and description of as many units as you want and then build a listing of parts used on each of those models in the database.

When you are selling parts to a customer, you can then refer to the database and select the customer's make and model from the list. You can create a pick/shopping list by tagging the parts you want with a quantity and then with a single key stroke (**F10**) you can import the list right into an invoice.

This will prove to be just as helpful to the experienced parts person as it will be to the inexperienced ones. This is especially true and will be of great value to your business, if an experienced parts person puts their years of knowledge and training into this database. It eliminates wasteful lookup time during those critical rush periods and frees up the more seasoned personnel from the constant inquisition by inexperienced personnel, so that everyone can be more productive. It will also be faster and easier to train new employees to use the parts that you keep in inventory, because you can control the information that is fed into this database.


In order to use this module, the user must first build the database.

- Select the **Point of Sale** area,
- then **POS Setup** from the menu,
- and then **Pick List Maint.**

The Screen should now say <<< **Electronic Merchandiser** >>> at the top and look like this...

The screenshot displays the 'Electronic Merchandiser' software interface. At the top, it shows the date '05/14/2015' on the left and 'Vers 7.6' on the right. The main title is '<<< Electronic Merchandiser >>>'. Below the title, there are two menu options: '[Machine]' and '[Popular Parts]'. Under '[Machine]', there are input fields for 'Make', 'Model', and 'Descript'. A red cursor is positioned over the 'Make' field. Below these fields is a box titled '[New Parts]' which contains input fields for 'Mfr', 'Part Number:', 'Description:', and 'Category'. At the bottom of the screen, there is a legend for function keys: 'Please', 'Esc Quit', 'F1 Help', 'F6 Clear', 'End Save', 'F2 Delete', and 'F7 Lookup'.



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You may now enter the make, model and description information for any unit you want to list in the database. Then enter a Manufacturer and Part # for any part that you want listed as being used on this particular model. Now press the  key to save this record.





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The part number will now appear on the right half of the screen under the heading of Popular Parts. You are now ready to enter the rest of the part numbers in order to finish the listing for this make and model.

Note: You may use any combination of manufacturers that you want when building a parts list for a particular make and model in the database.

When you are ready to use the database, you will find this information two keystrokes (, ) away from any parts or service invoice.

While in an invoicing screen (for parts or service) the information you entered can be accessed by pressing  (Help) and then selecting Quic parts lookup from the menu. You will then be prompted for a make and model. If you aren't sure about what to enter here, you can press the  key to see the list of makes and models on file in the database.

If there are too many units in the database to fit on one screen, you can use the  and  keys to see the next or previous page(s). You will make your selection from the list by highlighting it with the arrow keys and then by pressing . You now will see the model listing with the corresponding part numbers along with a blank space beside each of the part numbers. This blank is used for entering the quantity of the particular numbers you wish to sell. Once you have selected the desired quantities for the appropriate part numbers, press  to process and import the numbers into your invoice.

In those situations where the customer needs parts for more than one unit, you may repeat this process for a different make and model, while in the middle of an invoice, without losing the data that you have already entered. When you process the next list you will see that the previous data is still in place with the addition of the new data that you have selected.