



# Pos-I-Lube User's Guide

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# CHAPTER 1 : Store Setup

## Store Information Setup

Store Information needs to be setup correctly before you first start using the system to cash out customers. If you have just received a new system from Auto Data, everything except *Sales Tax* should already be filled in for you. However, it is a good idea to check this information and make sure it is configured to your needs.

### Navigating Store Information Setup

1. Click on *Home* Tab
2. Click on *Miscellaneous*
3. Click on *Store Setup*
4. Click on *Software Setup*
5. Click on *Store Information*
6. Enter pin.

You will now see this screen:

<b>Store Number</b> <input type="radio"/> 0001	<b>Store Information</b> <input type="radio"/> Store Name <b>AUTO DATA LUBE</b> <input type="radio"/> Street Address <b>123 PEACHTREE ST</b> <input type="radio"/> City <b>ATLANTA</b> <input type="radio"/> State <b>GA</b> <input type="radio"/> Zip <b>32308</b> <input type="radio"/> Phone Number <b>850-386-8373</b> <input type="radio"/> Sales Tax <b>7.500 %</b> <input type="radio"/> State I.D. <b>MV-982002</b> <input type="radio"/> CARFAX ID <b>FAX3240003</b>
<b>Fleet Lookup</b> <input type="radio"/> OFF <input checked="" type="radio"/> ON	
<b>Minimum Price</b> <input type="radio"/> \$15.00	
<b>Full Service Surcharge</b> <input checked="" type="radio"/> OFF <input type="radio"/> ON Description Amount <b>\$0.00</b>	
<b>Inventory Reorder Settings</b> <input type="radio"/> Days Lead Time <b>4</b>   <input type="radio"/> Days Between Shipments <b>14</b>   <input type="radio"/> Days Safety <b>7</b>	

To edit any field on this page:

1. Click on the radio button next to the line you want to change.
2. Proceed to type in the correct value and press <Enter>.

**NOTE:** All of the data in *Store Information Setup* may be changed before you open for the day or after you close. If you try to change some of these fields while you are open, you may get this message: "Cannot Change. A Z-Report must be printed first".

## Store Information Details

**Fleet Lookup-** If you are working in the Point-of-Sale program and do not have *Fleet Lookup* turned on, you will not be able to browse through your fleet list to select a fleet customer.

**Minimum Price-** All receipts that have a total below the *Minimum Price* will not be counted as a vehicle in your sales reports. The *Minimum Price* setting determines which tickets are counted in your daily total car count. You will want to set this amount slightly below the cost of your most inexpensive service (not part!). This allows you to keep track of how many cars you took in throughout the day for any service above your

**Minimum Price.** For instance, you would want to have all of your oil change services priced above the *Minimum Price* so that they will be counted as a car. This feature is useful for cases where a customer does not buy a major service, such as if a customer just buys a wiper blade or a bottle of oil.

**Full Service Surcharge** - It is possible to add an automatic taxable surcharge to all of your full services with the *Full Service Surcharge* feature. You can use this feature for a shop fee or any other taxed surcharge. The description and amount will print out on the receipt.

**Store Number** - If you only have one store, this number will usually be 0001. If you are part of a chain, this number will be assigned to you by your back office. You will probably never need to edit this field.

**Store Name, Address and Telephone** - These fields will appear on your receipts.

**Sales Tax** - Example: 7% Tax should be entered as 7000.

**State I.D.** - This field will also print out on your customers' receipt. They are not required in Pos-i-Lube, but might be required by state laws.

**CarFax I.D.** – Optional feature – If enrolled, customer data will be sent to Carfax, Inc for inclusion on their vehicle history reports. The service center that performs the service is listed along with date, mileage and what was performed.

## Inventory Reorder Settings

Inventory Reorder Settings are used in conjunction with the Automatic Parts Reordering feature of Pos-i-Lube. This feature tracks your usage habits and ultimately will be able to predict how many parts or lubricants should be ordered at any given time. Before using this feature, you will need to enter your own values in the *Inventory Reorder Settings* page. To change these settings, navigate to the *Store Information Setup* screen.

Inventory Reorder Settings					
<input type="radio"/> Days Lead Time	4	<input type="radio"/> Days Between Shipments	14	<input type="radio"/> Days Safety	7

- *Lead Time* is the number of business days from the time an order is placed until the order is delivered.
- *Days Between Shipments* is the number of business days from the arrival of one order until the arrival of the next order.
- *Days Safety* is the number of business days you will be able to operate in the event a shipment is late for delivery.

For more information on how to use Automatic Parts Reordering, see the Inventory section of this manual.

# CHAPTER 2: Inventory Setup

## Services

Each of the Services in the inventory are grouped into categories called product codes. These codes organize your services based on the types of service it is. For example, all of your oil change services are grouped together because they all use the same parts: oil filters. You can have as many services as you like in each of these product codes.

## Product Codes

Here is a list of product codes and the type of services that should go into each. All categories marked as User Defined can have any type of service that you want. All others need to follow this guide to ensure the data in your Stats menu is accurate.

1. Full Services
2. Air Filter Services
3. Transmission Services(For use with Kits only, no T-Tech services)
4. Breather Services
5. PCV Valve Services
6. Wiper Blade Service
- 7-8. User Defined
9. Flush and Fill Service
10. Front Differential Service
11. Rear Differential Service
12. Manual Transmission Service
13. Transfer Case Service
14. User Defined
15. Lube Only Service
- 16-17. User Defined
18. Car Wash
19. Air Conditioner Services
- 20 --> 54. User Defined
- 55-57. Miscellaneous Sales (taxable)
- 58-59. Miscellaneous Sales (non-taxable)
60. Miscellaneous Coupon (non-taxable)

CLOSE	
FULL SERVICE---	3
AIR FILTERS ---	2
BREATHERS ----	0
AUTO. TRANS ---	1
GEAR BOX -----	0
WIPER BLADES --	1
PCV VALVE -----	0
TUNE UP -----	0
CAR WASH -----	0
TOTAL VEHICLES-- 2	
Average Ticket :	\$272.40
Cash On Hand :	\$374.60
LUBE Labor:	\$0.00
TUNE-UP Labor:	\$0.00
WASH Labor:	\$0.00
Hours/Car :	0.00

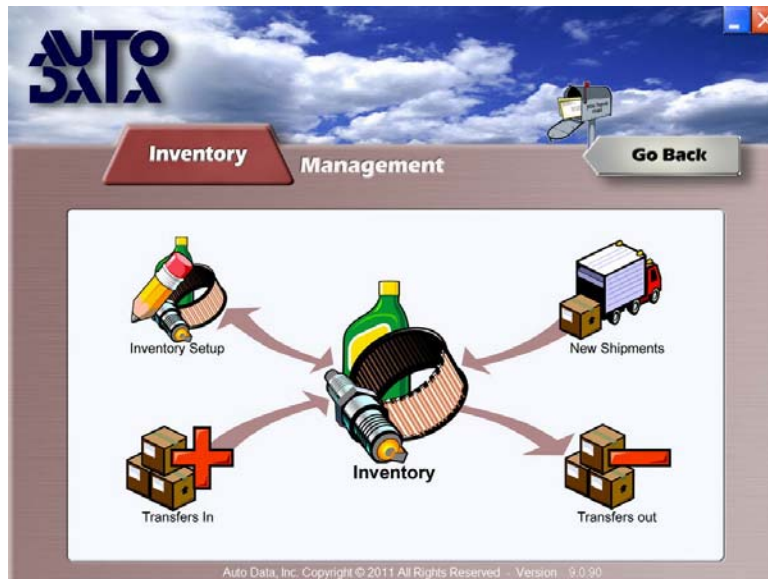
Note: Product codes 55-59 are miscellaneous sales. This means that when you select these services in the Point-of-Sale, you will be able to type in your own service description and your own price. Product code 60 is a miscellaneous coupon, and the only product code that will allow a negative amount in the Point-of-Sale. If you select miscellaneous coupon from the Point-of-Sale, you will be able to type in your own description for your coupon and also a negative number, which will then be subtracted from the ticket total.

## To Add a Service

Go to the *Inventory* tab, click on *Management*



Enter your password and then click on *Inventory Setup*



Select *Services* from the *Inventory Setup* screen.



The screenshot shows a software interface titled "PRODUCT CATEGORIES" with a sub-header "Inventory Setup". On the left, there is an icon of a wrench and a screwdriver crossed, with the text "Inventory Setup" below it. Below the icon is a "Go Back" button. On the right, there is a list of product categories, each preceded by a radio button:

- ☐ PACKAGES
- ☐ SERVICES
- ☐ PARTS
- ☐ LUBRICANTS
- ☐ COUPONS
- ☐ DISCOUNTS
- ☐ EMPLOYEES
- ☐ FULL SERVICE ADD-ONS
- ☐ FIXED LABOR

From the list of services, select the product code that you would like to add a service to.



The screenshot shows a software interface titled "PRODUCT CATEGORIES" with a sub-header "SERVICES". On the left, there is the same wrench and screwdriver icon with the text "Inventory Setup" below it. Below the icon is a "Go Back" button. To the right of the icon is a "Select Range" section with three radio buttons:

- ☒ 1 - 20
- ☐ 21 - 40
- ☐ 41 - 60

To the right of the "Select Range" section is a list of 20 service options, each preceded by a radio button:

- ☐ 1 FULL SERVICE OIL CHANGE
- ☐ 2 AIR FILTER
- ☐ 3 AUTOMATIC TRANSMISSION
- ☐ 4 BREATHER
- ☐ 5 PCV VALVE
- ☐ 6 WIPER BLADE
- ☐ 7 SERPENTINE BELT
- ☐ 8
- ☐ 9 FLUSH AND FILL
- ☐ 10 FRONT DIFFERENTIAL SVC
- ☐ 11 REAR DIFFERENTIAL SVC
- ☐ 12 MANUAL TRANS SERVICE
- ☐ 13 TRANSFER CASE SERVICE
- ☐ 14
- ☐ 15 LUBE ONLY SERVICE
- ☐ 16 DRAIN PLUG
- ☐ 17 RADIATOR CAP
- ☐ 18 CAR WASH
- ☐ 19 A/C SERVICE
- ☐ 20 STOP LEAK



Once you are in your selected product code, click the *Add* button at the bottom of the screen. This will create an empty service where you can type the name of the service, as it will appear in the Point-of-Sale.



Inventory Setup

### Inventory Setup for SERVICES

Description

Service Name

BASIC SERVC#

Description

Product Code

1

Retail Price

Taxable Amount

1 STD SERV

2 PREM SYNTH

3 LOF

4 OF ONLY

DIESEL FILT

HM FULL SER

SUV FULL SER

Set Up Features

Price Service By Parts

Call Up Parts

Call Up Quantity of Parts

Call Up Lubricants

Sales History

	Units
Day to Date	0
Month to Date	0
Year to Date	0
Total to Date	0

Service Interval

Miles: 0

Months: 0

PM Category

< NONE >

Inventory Setup

Make Change and Press Enter

Description

Once you have typed the name of the new service, press <Enter>. Type the *Description* of the service, which will appear on the customers' receipt. Press <Enter>.



Inventory Setup

### Inventory Setup for SERVICES

Description

Service Name

BASIC SERVC

Description

BASIC OIL CHANGE#####

Product Code

1

Retail Price

Taxable Amount

1 STD SERV

2 PREM SYNTH

3 LOF

4 OF ONLY

DIESEL FILT

HM FULL SER

SUV FULL SER

Set Up Features

Price Service By Parts

Call Up Parts

Call Up Quantity of Parts

Call Up Lubricants

Sales History

	Units
Day to Date	0
Month to Date	0
Year to Date	0
Total to Date	0

Service Interval

Miles: 0

Months: 0

PM Category


< NONE >

Inventory Setup

Make Change and Press Enter



Next, click on the *Change* button. Circular radio buttons will appear next to all the attributes of this service that you can edit.

  
Inventory Setup

**Inventory Setup for SERVICES**

☐ Service Name

BASIC SERVC

☐ Description

BASIC OIL CHANGE

☐ Retail Price

\$0.00

☐ Taxable Amount

\$0.00

Product Code

1

1 STD SERV

2 PREM SYNTH

3 LOF

4 OF ONLY

BASIC SERVC

DIESEL FILT

HM FULL SER

SUV FULL SER

Set Up Features

☐ Price Service By Parts

N

☐ Call Up Parts

N

☐ Call Up Quantity of Parts

N

☐ Call Up Lubricants

N

Sales History

Units

Day to Date

0

Month to Date

0

Year to Date

0

Total to Date

0

Service Interval

☐ Miles:

0

☐ Months:

0

PM Category


< NONE >

Inventory Setup

Click on Line to Change

Go Back

If this service has a retail price vs priced by parts, click on the radio button next to retail price and enter the price and then press <Enter>.

  
Inventory Setup

**Inventory Setup for SERVICES**

☐ Service Name

BASIC SERVC

☐ Description

BASIC OIL CHANGE

☒ Retail Price

\$#21.99

☐ Taxable Amount

\$0.00

Product Code

1

1 STD SERV

2 PREM SYNTH

3 LOF

4 OF ONLY

BASIC SERVC

DIESEL FILT

HM FULL SER

SUV FULL SER

Set Up Features

☐ Price Service By Parts

N

☐ Call Up Parts

N

☐ Call Up Quantity of Parts

N

☐ Call Up Lubricants

N

Sales History

Units

Day to Date

0

Month to Date

0

Year to Date

0

Total to Date

0

Service Interval

☐ Miles:

0

☐ Months:

0


PM Category

< NONE >


Inventory Setup

Enter New Data then Press

Click on the radio button next to *Taxable Amount* and enter how much of the retail price you want to be taxed and press <Enter>.



**Inventory Setup for SERVICES**

 Inventory Setup

**Description**

☐ Service Name BASIC SERVC

☐ Description BASIC OIL CHANGE

Product Code 1

☐ Retail Price \$21.99

☒ Taxable Amount **\$#15.00**

**Set Up Features**

☐ Price Service By Parts N

☐ Call Up Parts N

☐ Call Up Quantity of Parts N

☐ Call Up Lubricants N

**Sales History**

	Units
Day to Date	0
Month to Date	0
Year to Date	0
Total to Date	0

**Service Interval**

☐ Miles: 0

☐ Months: 0

**PM Category**

< NONE >

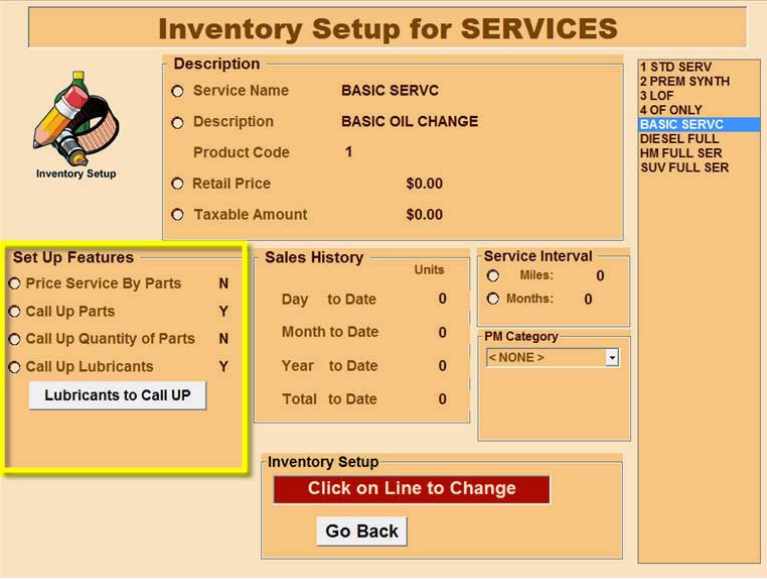
**Inventory Setup**

**Enter New Data then Press**


**Service List:**

- 1 STD SERV
- 2 PREM SYNTH
- 3 LOF
- 4 OF ONLY
- BASIC SERVC**
- DIESEL FILT
- HM FULL SER
- SUV FULL SER

Proceed to *Set Up features* and set to either Y for Yes or N for No.



**Inventory Setup for SERVICES**

 Inventory Setup

**Description**

☐ Service Name BASIC SERVC

☐ Description BASIC OIL CHANGE

Product Code 1

☐ Retail Price \$0.00

☐ Taxable Amount \$0.00

**Set Up Features**

☐ Price Service By Parts N

☐ Call Up Parts Y

☐ Call Up Quantity of Parts N

☐ Call Up Lubricants Y

**Lubricants to Call UP**

**Sales History**

	Units
Day to Date	0
Month to Date	0
Year to Date	0
Total to Date	0

**Service Interval**

☐ Miles: 0

☐ Months: 0

**PM Category**

< NONE >

**Inventory Setup**

**Click on Line to Change**

**Go Back**

**Service List:**

- 1 STD SERV
- 2 PREM SYNTH
- 3 LOF
- 4 OF ONLY
- BASIC SERVC**
- DIESEL FULL
- HM FULL SER
- SUV FULL SER

## Set Up Features

**Price Service By Parts:** This feature allows you to base the price of a service on the price of the part that you sell with that service. For example, you would price your air filter service by parts. You would set your retail price for your air filter service to \$0 and then you would have a price on each of your air filters. The price the customer will pay will depend solely on the air filter that was chosen. This feature requires that *Call Up Parts* be set to Y to work.

**Call Up Parts:** This feature allows you to call up a list of the parts in this product codes' parts list. For example, in your full service, you want Call Up Parts set to Yes so a list of your oil filters will pop up on the screen whenever you sell a full service. If this feature is enabled, you can accurately track your parts usage, and also be able to price the service by parts.

**Call Up Quantity of Parts:** This feature will call up a list after you select a part, which will allow you to tell Point-of-Sale how many of the selected part you used on the service.

**Call Up Lubricants:** This feature will allow you to call up a list of the items in your Lubricants inventory (A list of all of your oils).

**Lubricants to Call UP:** This feature allows you to select which oils you want to call up for each service.

To set up a custom oil list, click on *Lubricants to Call UP* button.

The screenshot shows a software interface for setting up a service. At the top, it says 'SERVICE: BASIC SERVC'. Below this, there are three steps: STEP #1 Select Lubricants, STEP #2 Copy to List, and STEP #3 Change the Order of List. In STEP #1, a list of lubricants is shown, including 7055 GREASE, ANTIFREEZE, ATF, and various oil grades like BULK 5W20, BULK 5W30, BULK 10W30, BULK 10W30HM, CAS 5W20 BT, CAS 5W30 BT, CAS 10W30BT, CAS 10W40 BT, CAS 20W50 BT, CH 0W20 SYN, CH 5W20 SYN, CH 5W30 HM, CH 5W30 SYN, CH 5W30SYNBL, CH 5W40 SYN, CH 10W30 SYN, CH10W30SYNBL, CH 10W40 BT, and CH 10W40 HM. In STEP #2, there are buttons for 'Copy', 'Select All', and 'Clear All'. A note states: 'Note: You may click on more than one selection in both of these lists.' In STEP #3, there is a 'Go Back' button and a 'Modify List' section with buttons for 'Move Up', 'Move Down', 'Remove', and 'Remove All'.

Click on each oil in the first column to select it. Once you are done selecting your oils, click *Copy*.

This screenshot is similar to the previous one, but the 'Copy' button in STEP #2 is highlighted with a red box, indicating it should be clicked. The list of lubricants in STEP #1 is the same, but the selection process is now complete. The 'Modify List' section in STEP #3 remains visible.

If you'd like to change the order of your final list or delete any oils from it, use the *Modify List* toolbar on right side of screen. When finished creating your custom oil list, click *Go Back* to return to your service options.

Once you are done programming the *Set Up Features*, you have successfully added a service and it will appear in your Point-of-Sale under the Services menu.

If the service you have just added requires parts, proceed to the Parts section of the manual to learn how to add the parts for your services.

## Sales History

Will show you how many of this particular service have been sold for day, month, year and in total.

## Service Interval

*Miles* – The customer's receipt and static sticker will indicate they should return in this many miles.

*Months* - The customer's receipt and static sticker will indicate they should return in this many months.

## PM Category

If the Preventative Maintenance Schedule feature is installed, the user simply needs to select the service they want to appear on the schedule by clicking the arrow in the drop down list and choosing appropriate service. Only one service per product code can be assigned to the PM Schedule.

## To Edit a Service

To edit a service (i.e. change the price of a service), first navigate to the service you would like to edit. Second, click *Change* button. Third, click radio button next to the line you want to edit, type what you want to edit and press Enter. Click *Go Back* to exit the *Services* screen.

## To Delete a Service

To delete a service, just select the service you would like to delete by clicking on it and then click the *Delete* button on the bottom of the screen. Click *Yes* when asked if you really want to delete the service.

# Parts

All parts are categorized in your inventory based on the 'type' of part. For instance, all of your oil filters are grouped together and all of your air filters are grouped together. In order for your inventory quantities and sales to be tracked correctly, you need to group the parts correctly.

## Product Codes

To add parts to your inventory, first you need to find the correct product code. Remember, the parts product code must match the services product code. For example, if you are adding your air filter parts and you have your air filter service in product code 2, your air filters will need to go into product code 2 also. See figure below.



## To Add a new Part

1. Go to the *Inventory* tab, click on *Management*
2. Enter your password and then click on *Inventory Setup*
3. Select *Parts* from the *Inventory Setup* screen.

From the list of parts, select the category that you would like to add a part to. Remember to group similar parts together and to match the parts product code with the services product code.

**PRODUCT CATEGORIES**

**PARTS**

 Inventory Setup

**Select Range**

☒ 1 - 20

☐ 21 - 40

☐ 41 - 54

**Go Back**

Quantity in a Case Ordering Rules

Qty = 0 means Do Not Order this part.

Qty = 1 means Order in Single Units and always have at least ONE on hand.

Qty = Full Case Qty means always have at least one CASE on hand.

- ☐ 1 OIL FILTER
- ☐ 2 AIR FILTER
- ☐ 3 TRANS FILTER
- ☐ 4 BREATHER FILTER CTF
- ☐ 5 PCV VALVE
- ☐ 6 EVOLUTION OEM 21
- ☐ 7 FUEL FILTERS
- ☐ 8 OIL SYSTEM CLEANER
- ☐ 9
- ☐ 10
- ☐ 11 LIMITED SLIP ADDITIVE
- ☐ 12
- ☐ 13
- ☐ 14 SERPENTINE BELT
- ☐ 15 LIGHT/LAMP REPLACEMENT
- ☐ 16 POWER STEERING EXCHG KIT
- ☐ 17 CABIN AIR FILTER
- ☐ 18 TRANSMISSION FLUID KIT
- ☐ 19 2 STEP FUEL SYS CLEANER
- ☐ 20 20LB FULL CYLINDER

Once you are in your selected product code, click the *Add* button at the bottom of the screen.

**Inventory Setup for PARTS**

 Inventory Setup

**Description**

Part Number AF3

Description AIR FILTER

Product Code 2

Retail Price \$12.99

Your Cost \$4.47

**Quantities**

Quantity On Hand 8

Beginning Quantity 8

Quantity Received 0

Adjustments 0

Transfers In / Out 0

Quantity On Order 0

Quantity In a Case 1

Average Mo. Usage 2

**Sales History**

	Units	Gross	Net
Day to Date	0	\$0.00	\$0.00
Month to Date	0	\$0.00	\$0.00
Year to Date	0	\$0.00	\$0.00
Total to Date	1	\$12.99	\$8.52

**Inventory Setup**

**Add** **Change** **Delete**

**SERVICE for these PARTS** **Go Back**

AF3  
AF4  
AF16  
AF45  
AF67  
AF70  
AF74  
AF83  
AF90  
AF91  
AF92  
AF103  
AF110  
AF113  
AF120  
AF124 DISC  
AF1149  
AF1153  
AF1708  
AF2442  
AF2923  
AF2944  
AF3087  
AF3137  
AF3181  
AF3191 DISC  
AF3192  
AF3195  
AF3327  
AF3380 DISC  
AF3384 DISC  
AF3398  
AF3436  
AF3465  
AF3467



This will create a new part where you can type the part number, as you would like it to appear in the Point-of-Sale.

Note: Make sure to enter part numbers exactly. If part numbers are incorrect, parts recommendations will not display on your work order.



Inventory Setup

### Inventory Setup for PARTS

Description

Part Number

A24859#####

Description

Product Code

2

Retail Price

\$0.00

Your Cost

\$0.00

Quantities

Quantity On Hand

0

Beginning Quantity

0

Quantity Received

0

Adjustments

0

Transfers In / Out

0

Quantity On Order

0

Quantity In a Case

0

Average Mo. Usage

0

Sales History

	Units	Gross	Net
Day to Date	0	\$0.00	\$0.00
Month to Date	0	\$0.00	\$0.00
Year to Date	0	\$0.00	\$0.00
Total to Date	0	\$0.00	\$8.52

Inventory Setup

Make Change and Press Enter

AF3

AF4

AF16

AF45

AF67

AF70

AF74

AF83

AF90

AF91

AF92

AF103

AF110

AF113

AF120

AF124 DISC

AF1149

AF1153

AF1708

AF2442

AF2923

AF2944

AF3087

AF3137

AF3181

AF3191 DISC

AF3192

AF3195

AF3327

AF3380 DISC

AF3384 DISC

AF3398

AF3436

AF3465

AF3467

Once you have typed the part number, press <Enter>.

Type the part *Description*, which will appear on the receipt. Press <Enter>.



Inventory Setup

### Inventory Setup for PARTS

Description

Part Number

A24859

Description

AIR FILTER#####

Product Code

2

Retail Price

\$0.00

Your Cost

\$0.00

Quantities

Quantity On Hand

0

Beginning Quantity

0

Quantity Received

0

Adjustments

0

Transfers In / Out

0

Quantity On Order

0

Quantity In a Case

0

Average Mo. Usage

0

Sales History

	Units	Gross	Net
Day to Date	0	\$0.00	\$0.00
Month to Date	0	\$0.00	\$0.00
Year to Date	0	\$0.00	\$0.00
Total to Date	0	\$0.00	\$8.52

Inventory Setup

Make Change and Press Enter

AF3

AF4

AF16

AF45

AF67

AF70

AF74

AF83

AF90

AF91

AF92

AF103

AF110

AF113

AF120

AF124 DISC

AF1149

AF1153

AF1708

AF2442

AF2923

AF2944

AF3087

AF3137

AF3181

AF3191 DISC

AF3192

AF3195

AF3327

AF3380 DISC

AF3384 DISC

AF3398

AF3436

AF3465

AF3467

Next, click the *Change* button. Circular radio buttons will appear next to all the attributes of this part that you can edit.

  
Inventory Setup

### Inventory Setup for PARTS

☐ Part Number

A24859

☐ Description

AIR FILTER

☐ Product Code

2

☐ Retail Price

\$0.00

☐ Your Cost

\$0.00

Quantities

Quantity On Hand

0

Beginning Quantity

0

Quantity Received

0

Adjustments

0

Transfers In / Out

0

Quantity On Order

0

☐ Quantity In a Case

0

Average Mo. Usage

0

Sales History

	Units	Gross	Net
Day to Date	0	\$0.00	\$0.00
Month to Date	0	\$0.00	\$0.00
Year to Date	0	\$0.00	\$0.00
Total to Date	0	\$0.00	\$8.52

Inventory Setup

Click on Line to Change

Go Back

A24859

AF3

AF4

AF16

AF45

AF67

AF70

AF74

AF83

AF90

AF91

AF92

AF103

AF110

AF113

AF120

AF124 DISC

AF1149

AF1153

AF1708

AF2442

AF2923

AF2944

AF3087

AF3137

AF3181

AF3191 DISC

AF3192

AF3195

AF3327

AF3380 DISC

AF3384 DISC

AF3398

AF3436

AF3465

Click on the radio button next to *Retail Price* and enter the price of the part, press <Enter>.

  
Inventory Setup

### Inventory Setup for PARTS

☐ Part Number

A24859

☐ Description

AIR FILTER

☐ Product Code

2

☒ Retail Price

\$#15.99

☐ Your Cost

\$0.00

Quantities

Quantity On Hand

0

Beginning Quantity

0

Quantity Received

0

Adjustments

0

Transfers In / Out

0

Quantity On Order

0

☐ Quantity In a Case

0

Average Mo. Usage

0

Sales History

	Units	Gross	Net
Day to Date	0	\$0.00	\$0.00
Month to Date	0	\$0.00	\$0.00
Year to Date	0	\$0.00	\$0.00
Total to Date	0	\$0.00	\$8.52

Inventory Setup

Enter New Data then Press

A24859

AF3

AF4

AF16

AF45

AF67

AF70

AF74

AF83

AF90

AF91

AF92

AF103

AF110

AF113

AF120

AF124 DISC

AF1149

AF1153

AF1708

AF2442

AF2923

AF2944

AF3087

AF3137

AF3181

AF3191 DISC

AF3192

AF3195

AF3327

AF3380 DISC

AF3384 DISC

AF3398

AF3436

AF3465



Click on the radio button next to *Your Cost* and enter how much you paid for this part. Remember, your cost is only used for reporting purposes and will never print on a receipt.



**Inventory Setup for PARTS**

**Description**

☐ Part Number A24859

☐ Description AIR FILTER

Product Code 2

☐ Retail Price \$15.99

☒ Your Cost **##\$8.99**

**Quantities**

Quantity On Hand 0

Beginning Quantity 0

Quantity Received 0

Adjustments 0

Transfers In / Out 0

Quantity On Order 0

☐ Quantity In a Case 0

Average Mo. Usage 0

**Sales History**

	Units	Gross	Net
Day to Date	0	\$0.00	\$0.00
Month to Date	0	\$0.00	\$0.00
Year to Date	0	\$0.00	\$0.00
Total to Date	0	\$0.00	\$0.00

**Inventory Setup**

**Enter New Data then Press**

**Part List:** A24859, AF3, AF4, AF16, AF45, AF67, AF70, AF74, AF83, AF90, AF91, AF92, AF103, AF110, AF113, AF120, AF124 DISC, AF1149, AF1153, AF1708, AF2442, AF2923, AF2944, AF3087, AF3137, AF3181, AF3191 DISC, AF3192, AF3195, AF3327, AF3360 DISC, AF3384 DISC, AF3398, AF3436, AF3465

### Quantity In a Case – Rules to Order By

Qty = 0 means Do Not Order this part

Qty = 1 means Order in Single Units and always have at least one on hand

Qty = X means Order in Full Case Qty and always have at least one case on hand

Click on radio button next to *Quantity In a Case* and enter the appropriate amount, then press <Enter>.



**Inventory Setup for PARTS**

**Description**

☐ Part Number A24859

☐ Description AIR FILTER

Product Code 2

☐ Retail Price \$15.99

☐ Your Cost \$8.99

**Quantities**

Quantity On Hand 0

Beginning Quantity 0

Quantity Received 0

Adjustments 0

Transfers In / Out 0

Quantity On Order 0

☒ Quantity In a Case **##3**

Average Mo. Usage 0

**Sales History**

	Units	Gross	Net
Day to Date	0	\$0.00	\$0.00
Month to Date	0	\$0.00	\$0.00
Year to Date	0	\$0.00	\$0.00
Total to Date	0	\$0.00	\$0.00

**Inventory Setup**

**Enter New Data then Press**

**Part List:** A24859, AF3, AF4, AF16, AF45, AF67, AF70, AF74, AF83, AF90, AF91, AF92, AF103, AF110, AF113, AF120, AF124 DISC, AF1149, AF1153, AF1708, AF2442, AF2923, AF2944, AF3087, AF3137, AF3181, AF3191 DISC, AF3192, AF3195, AF3327, AF3360 DISC, AF3384 DISC, AF3398, AF3436, AF3465

You have successfully added the new part to your inventory. To enter quantities for this part, you will need to go to the *New Shipments* section.

**Note:** For Product Code 1, which holds all of your full services, there is no option for *Retail Price* under the parts section. Instead there is a field for *Add-on price* because the price of the filter is included in the price of the full service. In case a particular filter is more expensive, the *Add-on price* would equal the upcharge amount. The same applies to product code 3.

## To Delete a Part

Highlight the part number from your parts list on the right hand side by clicking on it. Click the *Delete* button and click Yes if you are sure you would like to delete this part.

### ***Service for these Parts/Parts for this Service***

The *Parts for this Service* and *Service for these Parts* button allows you to freely jump between a service and its parts and back. This eliminates having to use the *Go Back* button to exit out of a service and go back into the parts section just to view the parts. This button is only present in the parts and services categories.

## Lubricants

All of the lubricants are added to this one category, regardless of type. Make sure to price each lubricant according to the type of unit used to sell it. For instance, bulk oil should be entered in quarts, not gallons (4 quarts = 1 gallon).

## To Add a Lubricant

1. Go to the *Inventory* tab, click on *Management*
2. Enter your password and then click on *Inventory Setup*
3. Select *Lubricants* from the *Inventory Setup* screen.

Click the *Add* button at the bottom of the screen.

**Inventory Setup for Lubricants**

**Description**

Part Number	BULK 5W20
Description	5W20 BULK OIL
Product Code	80
Retail Price	\$3.00
Your Cost	\$1.88

**Quantities**

Quantity On Hand	355
Beginning Quantity	710
Quantity Received	0
Adjustments	0
Transfers In / Out	0
Quantity On Order	0
Quantity In a Case	1
Average Mo. Usage	1,284

**Sales History**

	Units
Day to Date	0
Month to Date	356
Year to Date	7,742
Total to Date	62,614

**Inventory Setup**

Add Change Delete Go Back

**Part List:**

- BULK 5W20
- BULK 5W30
- BULK 10W30
- BULK 10W30HM
- CAS 5W20 BT
- CAS 5W30 BT
- CAS 10W30 BT
- CAS 10W40 BT
- CAS 20W50 BT
- GL4 SYN
- GL5
- GL5 75W90 SY
- GL5 75W140SY
- GMAT
- HAV 5W30 BT
- HAV 10W30 BT
- HAV 10W40 BT
- HAV 20W50 BT
- MOBIL 1 0W30
- MOBIL 1 0W40
- MOBIL 1 5W20
- MOBIL 1 5W30
- MOBIL 1 10W30
- MOBIL 1 15W50
- OWN MTR OIL
- PSF
- PSF-HONDA
- PZ 0W20 SYN
- PZ 5W20 BT
- PZ 5W20 HM
- PZ 5W20 SYN
- PZ 5W30 BT
- PZ 5W30 HM
- PZ 5W30 SYN
- PZ 5W40 SYN

Type the lubricant name in the *Part Number* text box and press <Enter>.



Inventory Setup

Description

Part Number

MOBIL 20W50#

Description

Product Code

80

Retail Price

Your Cost

\$0.00

\$0.00

Quantities

Quantity On Hand

Beginning Quantity

Quantity Received

Adjustments

Transfers In / Out

Quantity On Order

Quantity In a Case

Average Mo. Usage

0

0

0

0

0

0

0

0

Sales History

Units

Day to Date

Month to Date

Year to Date

Total to Date

0

0

0

0

0

Inventory Setup

Make Change and Press Enter

BULK 5W20

BULK 5W30

BULK 10W30

BULK 10W30HM

CAS 5W20 BT

CAS 5W30 BT

CAS 10W30 BT

CAS 10W40 BT

CAS 20W50 BT

GL4 SYN

GL5

GL5 75W90 SY

GL5 75W140SY

GMAT

HAV 5W30 BT

HAV 10W30 BT

HAV 10W40 BT

HAV 20W50 BT

MOBIL 1 0W30

MOBIL 1 0W40

MOBIL 1 5W20

MOBIL 1 5W30

MOBIL 1 10W30

MOBIL 1 15W50

OWN MTR OIL

PSF

PSF-HONDA

PZ 0W20 SYN

PZ 5W20 BT

PZ 5W20 HM

PZ 5W20 SYN

PZ 5W30 BT

PZ 5W30 HM

PZ 5W30 SYN

PZ 5W40 SYN

Type the *Description*, which will appear on the receipt. Press <Enter>.



Inventory Setup

Description

Part Number

MOBIL 20W50

Description

Product Code

MOBIL 20W50 55 GAL DRUM##

80

Retail Price

Your Cost

\$0.00

\$0.00

Quantities

Quantity On Hand

Beginning Quantity

Quantity Received

Adjustments

Transfers In / Out

Quantity On Order

Quantity In a Case

Average Mo. Usage

0

0

0

0

0

0

0

0

Sales History

Units

Day to Date

Month to Date

Year to Date

Total to Date

0

0

0

0

0

Inventory Setup

Make Change and Press Enter

BULK 5W20

BULK 5W30

BULK 10W30

BULK 10W30HM

CAS 5W20 BT

CAS 5W30 BT

CAS 10W30 BT

CAS 10W40 BT

CAS 20W50 BT

GL4 SYN

GL5

GL5 75W90 SY

GL5 75W140SY

GMAT

HAV 5W30 BT

HAV 10W30 BT

HAV 10W40 BT

HAV 20W50 BT

MOBIL 1 0W30

MOBIL 1 0W40

MOBIL 1 5W20

MOBIL 1 5W30

MOBIL 1 10W30

MOBIL 1 15W50

OWN MTR OIL

PSF

PSF-HONDA

PZ 0W20 SYN

PZ 5W20 BT

PZ 5W20 HM

PZ 5W20 SYN

PZ 5W30 BT

PZ 5W30 HM

PZ 5W30 SYN

PZ 5W40 SYN

Next, click the *Change* button. Radio buttons will appear next to all the attributes of this lubricant that you can edit. Click on the radio button next to *Retail Price* and enter the price of the lubricant. Remember to price the lubricant in the unit it will be sold. Press <Enter>.



**Inventory Setup for Lubricants**

**Description**

☐ Part Number MOBIL 20W50

☐ Description MOBIL 20W50 55 GAL DRUM

Product Code 80

☒ Retail Price **\$\$\$2.99**

☐ Your Cost \$0.00

**Quantities**

Quantity On Hand 0

Beginning Quantity 0

Quantity Received 0

Adjustments 0

Transfers In / Out 0

Quantity On Order 0

☐ Quantity In a Case 0

Average Mo. Usage 0

**Sales History**

	Units
Day to Date	0
Month to Date	0
Year to Date	0
Total to Date	0

**Inventory Setup**

**Enter New Data then Press**

BULK 5W20  
BULK 5W30  
BULK 10W30  
BULK 10W30HM  
CAS 5W20 BT  
CAS 5W30 BT  
CAS 10W30 BT  
CAS 10W40 BT  
CAS 20W50 BT  
GL4 SYN  
GL5  
GL5 75W90 SY  
GL5 75W140SY  
GMAT  
HAV 5W30 BT  
HAV 10W30 BT  
HAV 10W40 BT  
HAV 20W50 BT  
**MOBIL 20W50**  
MOBIL 1 0W30  
MOBIL 1 0W40  
MOBIL 1 5W20  
MOBIL 1 5W30  
MOBIL 1 10W30  
MOBIL 1 15W50  
OWN MTR OIL  
PSF  
PSF-HONDA  
PZ 0W20 SYN  
PZ 5W20 BT  
PZ 5W20 HM  
PZ 5W20 SYN  
PZ 5W30 BT  
PZ 5W30 HM  
PZ 5W30 SYN

Click on the button next to *Your Cost* and enter how much you paid for this lubricant. Remember, your cost is only used for reporting purposes and will never print on a receipt.



**Inventory Setup for Lubricants**

**Description**

☐ Part Number MOBIL 20W50

☐ Description MOBIL 20W50 55 GAL DRUM

Product Code 80

☐ Retail Price \$2.99

☒ Your Cost **\$\$\$1.90**

**Quantities**

Quantity On Hand 0

Beginning Quantity 0

Quantity Received 0

Adjustments 0

Transfers In / Out 0

Quantity On Order 0

☐ Quantity In a Case 0

Average Mo. Usage 0

**Sales History**

	Units
Day to Date	0
Month to Date	0
Year to Date	0
Total to Date	0

**Inventory Setup**

**Enter New Data then Press**

BULK 5W20  
BULK 5W30  
BULK 10W30  
BULK 10W30HM  
CAS 5W20 BT  
CAS 5W30 BT  
CAS 10W30 BT  
CAS 10W40 BT  
CAS 20W50 BT  
GL4 SYN  
GL5  
GL5 75W90 SY  
GL5 75W140SY  
GMAT  
HAV 5W30 BT  
HAV 10W30 BT  
HAV 10W40 BT  
HAV 20W50 BT  
**MOBIL 20W50**  
MOBIL 1 0W30  
MOBIL 1 0W40  
MOBIL 1 5W20  
MOBIL 1 5W30  
MOBIL 1 10W30  
MOBIL 1 15W50  
OWN MTR OIL  
PSF  
PSF-HONDA  
PZ 0W20 SYN  
PZ 5W20 BT  
PZ 5W20 HM  
PZ 5W20 SYN  
PZ 5W30 BT  
PZ 5W30 HM  
PZ 5W30 SYN

You have successfully added a new lubricant to your inventory. To enter quantities for this lubricant, you will need to go to the *New Shipments* section.

## To Delete a Lubricant

From the *Lubricants* page, highlight the part number of the lubricant you want to delete from the list on the right hand side of the screen. Click *Delete* button and click *Yes* if you are sure you want to delete this lubricant.

# Full Service Add-Ons

A Full Service Add-on is an additional charge that you would attach to a full service if it requires additional work or parts that you wouldn't normally include with the service. For example, you might want to charge \$5 extra if you need to remove a skid plate from a vehicle. Therefore, you would setup an add-on named Skid Plate with an add-on amount of \$5.00.

## To Add a Full Service Add-On

1. Go to the *Inventory* tab, click on *Management*
2. Enter your password and then click on *Inventory Setup*
3. Select *Full Service Add-Ons* from the *Inventory Setup* screen.

Click the *Add* button at the bottom of the screen.

**Inventory Setup for Add-Ons**

**Description**

Add-On Name	MOTOR HOME
Description	MOTOR HOME ADDL CHARGE
Product Code	86
Add-On Amount	\$14.00
Taxable Amount	\$14.00

**Sales History**

	Units
Day to Date	0
Month to Date	0
Year to Date	0
Total to Date	0

**Inventory Setup**

Add Change Delete Go Back

MOTOR HOME  
NPR UPCHARGE  
PREMSYNTH

This will create an empty field where you can type the name of the Add-On as you would like it to appear in the Point-of-Sale. Type the name and press <Enter>.

**Inventory Setup for Add-Ons**

**Description**

Add-On Name	SKID PLATE##
Description	
Product Code	86
Add-On Amount	\$0.00
Taxable Amount	\$0.00

**Sales History**

	Units
Day to Date	0
Month to Date	0
Year to Date	0
Total to Date	0

**Inventory Setup**

Make Change and Press Enter

MOTOR HOME  
NPR UPCHARGE  
PREMSYNTH

Type the *Description* of the service, which will appear on the receipt. Press <Enter>.

  
Inventory Setup

### Inventory Setup for Add-Ons

**Description**  
Add-On Name SKID PLATE  
Description SKID PLATE UPCHARGE#####  
Product Code 86  
Add-On Amount \$0.00  
Taxable Amount \$0.00

**Sales History**

	Units
Day to Date	0
Month to Date	0
Year to Date	0
Total to Date	0

**Inventory Setup**  
Make Change and Press Enter

MOTOR HOME  
NPR UPCHARGE  
PREMSYNTH  
SKID PLATE

Next, click on the *Change* button. Circular radio buttons will appear next to all the attributes of this add-on that you can edit. Click on the radio button next to *Add-On Amount* and enter the amount you would like to charge.

  
Inventory Setup

### Inventory Setup for Add-Ons

**Description**  
☐ Add-On Name SKID PLATE  
☐ Description SKID PLATE UPCHARGE  
Product Code 86  
☒ Add-On Amount ##5.00  
☐ Taxable Amount \$0.00

**Sales History**

	Units
Day to Date	0
Month to Date	0
Year to Date	0
Total to Date	0

**Inventory Setup**  
Enter New Data then Press

MOTOR HOME  
NPR UPCHARGE  
PREMSYNTH  
SKID PLATE



If you would like to tax any portion of your add-on amount, click on the radio button next to *Taxable Amount* and enter an appropriate quantity. If not, you have successfully added a new Full Service Add-on to your inventory. In the Point of Sale, whenever you sell any service that is listed in your Product Code 1, you will have the option to select any of the add-ons that you have previously set up in your inventory.



Inventory Setup

Inventory Setup for Add-Ons

Description

Add-On Name	SKID PLATE
Description	SKID PLATE UPCHARGE
Product Code	86
Add-On Amount	\$5.00
Taxable Amount	\$0.00

Sales History

	Units
Day to Date	0
Month to Date	0
Year to Date	0
Total to Date	0

Inventory Setup

Add

Change

Delete

Go Back

MOTOR HOME

NPR UPCHARGE

PREMSYNTH

SKID PLATE

## To Delete a Full Service Add-On

From the *Full Service Add-Ons* page, highlight the add-on name from your list, click *Delete* button and click Yes if you are sure you would like to delete the add-on.



# Packages

The Packages feature allows you to bundle services and add a coupon to them. This is useful if there are certain services you usually sell together, such as a full service and an air filter service. If you want to give the customer a discount for purchasing both items at the same time, you can sell them the package and the coupon will be automatically applied.

## To Create a Package

1. Go to the *Inventory* tab, click on *Management*
2. Enter your password and then click on *Inventory Setup*
3. Select *Packages* from the *Inventory Setup* screen.

Click the *Add* button under *Edit Packages* and enter new package name. Press <Enter>.

The screenshot shows the 'Edit Packages' screen. On the left, there is a vertical menu with buttons: 'Add', 'Delete', 'Move Up', and 'Move Down'. The main area is divided into several sections. At the top, 'NAME of Package' is set to 'BASIC PKG###' in a red box. Below it, 'PACKAGES' lists 'FULL PKG' and 'FLEET PKG'. To the right, 'COUPON in Package' is set to '< NONE >' with a dropdown arrow, and a '\$0.00' field. At the bottom, 'SERVICES in Package' is empty. To the right of this, a list of services is shown: 'DRIVE CLEAN', 'FLEET SVC', 'FULL SERVICE', 'HIGH MILEAGE', 'MOBIL 1', 'AIR FILTER', 'AUTO TRANS', 'BREATHING', 'PCV', 'WIPER BLADE', 'BELTS', and 'FLUSH FILL'. A 'Go Back' button is in the top right corner.

You have created a package, now you need to add services and an optional coupon.

## To Add Services to a Package

Click on the name of the package you would like to add services to. Click on a service name and then click the *Add* button to add it to the selected package (Add as many as six services to your package).

The screenshot shows the 'Edit Packages' screen after adding a service. The 'NAME of Package' is now 'BASIC PKG' in a blue box. The 'PACKAGES' list now includes 'FULL PKG', 'FLEET PKG', and 'BASIC PKG', with 'BASIC PKG' highlighted. The 'COUPON in Package' remains '< NONE >' and '\$0.00'. In the 'SERVICES in Package' section, 'FULL SERVICE' is now listed. The service list on the right remains the same, with 'AIR FILTER' highlighted. The 'Go Back' button is still in the top right corner.

If you would like to add a coupon to this package, first make sure the correct package is selected. Next, click on the drop-down list under *COUPON in Package* section and select a coupon. This coupon will automatically be applied whenever you sell this package.

The screenshot shows a web-based interface for managing car service packages. It is divided into several functional areas:

- Edit Packages:** A vertical sidebar on the left containing buttons for 'Add', 'Delete', 'Move Up', and 'Move Down'.
- NAME of Package:** A section at the top center showing the current package name, 'BASIC PKG', with a 'Go Back' button to its right.
- PACKAGES:** A list of available packages: 'FULL PKG', 'FLEET PKG', and 'BASIC PKG'. 'BASIC PKG' is currently selected and highlighted.
- Edit Services:** Another vertical sidebar on the left, below 'Edit Packages', with buttons for 'Add', 'Delete', 'Move Up', and 'Move Down'.
- SERVICES in Package:** A list of services included in the selected package: 'FULL SERVICE', 'AIR FILTER', and 'WIPER BLADE'. 'WIPER BLADE' is currently selected and highlighted.
- COUPON in Package:** A dropdown menu on the right side. The top option is '< NONE >'. Below it, a list of coupons is displayed, including 'BASIC', 'BEST \$24.99', 'ENJOY \$3.00', 'ENJOY \$5.00', 'GIFT \$27.99', 'GIFT \$28.99', 'GIFTCERT\$10', 'MOBIL 1', 'AIR FILTER', 'AUTO TRANS', 'BREATHER', 'PCV', 'WIPER BLADE', 'BELTS', and 'FLUSH FILL'.

### To Edit a Package

To edit a package, click on the package name, then click on individual services within the package and move them up or down in priority, or delete them. You can also add more services or change the coupon associated with this package. Lastly, you can delete the package altogether by clicking on the package name and then clicking the *Delete* button from the *Edit Packages* section.

# Coupons

Coupons are a method by which you can deduct a dollar amount from a transaction. You can have up to 5 coupons on any single transaction.

To set up a new coupon:

1. From *Inventory Setup*, click on the *Coupons* category.
2. Click the *Add* button.
3. Enter the coupon name (This is the name that will appear in the Point of Sale).
4. Enter the coupon description (This will appear on the customer's receipt).
5. Click the *Change* button and then click on the radio button next to *Redeemable Value*.
6. Enter value of the coupon. For example, for a \$2.00 off coupon, the *Redeemable Value* should be entered as 2.00.

You can also enter an expiration date. Once the expiration date has passed, the technician cashing out the customer will be alerted that the coupon is expired, but will be given the option to use the coupon anyway.

**Inventory Setup for Coupons**

**Description**

Coupon	BUMPER STICK
Description	BUMPER STICKER COUPON
Product Code	82
Redeemable Value	\$2.00

**Sales History**

	Units
Day to Date	0
Month to Date	3
Year to Date	99
Total to Date	1,296

**Expiration Date**  
12 / 31 / 2011

**Inventory Setup**

Add Change Delete Go Back

30K \$50 OFF  
30K \$55 OFF  
30K \$60 OFF  
AP50C  
AS50C  
ASSC  
BELT 10  
**BUMPER STICK**  
C0S50C  
CAB AIR FILT  
CAELUTO VIP  
CC0C7  
CCN50C  
CCPM10  
COOLANT \$10  
CR40C  
CR50C  
CR60C  
CR10FSC  
CR3TP60  
CT50C  
CT10FSC  
ENV50C  
ENV60C  
ENV10PM  
ENVISION 4  
FLUEL SYS 10  
FR GUMOUTGAS  
FSU C-4  
FSV50C  
FUELFIL \$10  
GS5  
HERTZ \$1 OFF  
INTERNET 4  
KL50C

After setting up at least one coupon in your inventory, you will be able to view a list of your coupons in the Point-of-Sale by clicking on the Coupon menu at the top of the screen.

# Discounts

Discounts allow you to deduct a percentage off of a transaction. You can only have 1 discount on any single transaction. To add a new discount, follow steps 1-6 above.

  
Inventory Setup

Description

Discount

MANAGERS 10

Description

MANAGERS DISCOUNT

Product Code

83

Percentage

10%

Sales History

	Units
Day to Date	0
Month to Date	0
Year to Date	0
Total to Date	7

Inventory Setup

Add

Change

Delete

Go Back

FHF

FLEET

FLEET 10%

FLEET 15%

FLEET 20%

FLEET 24%

FLEET 25%

FLEET 30%

FPC15

FSUCU

G G10

GCL10

HBN15

HERTZ

JR10

KTLCB

KWB

KWR15

LC5

LC815

LL10

LLR10

LMP15

M-L10

**MANAGERS 10**

MEC10

MES

MND

MS

MS15

MSB2

MSTT

NBC

NCCF

OPUS

NOTE: Coupons and discounts can be combined on a single receipt.

# Employees

You can enter your list of employees into the system to be able to clock them in and out, keep track of who worked on a particular day and also to be able to assign them to different positions for each car you service.

## To Add an Employee

- 1. Go to the *Inventory* tab, click on *Management*
- 2. Enter your password and then click on *Inventory Setup*
- 3. Select *Employees* from the *Inventory Setup* screen.

Click the *Add* button at the bottom of the screen.

  
Inventory Setup

Description

Employee Name

BOB

Emp. Full Name

ROBERT WHITFIELD

Product Code

81

Hourly Rate of Pay

\$8.00

Phone Number

210-546-8777

Inventory Setup

Add

Change

Delete

Set Permissions

Go Back

BOB

BRITTANY

CHAD

CHARLES

CHRIS M

DAVID

KEVIN

LARRY

PHIL

ROBERT

SEAN

SUSAN

Enter the employee's name (Which will appear in the Point-of-Sale) and press <Enter>.

**Inventory Setup for Employees**

**Description**

Employee Name: JASON#####

Emp. Full Name:

Product Code: 81

Hourly Rate of Pay: \$0.00

Phone Number:

Employee List: BOB, BRITTANY, CHAD, CHARLES, CHRIS M, DAVID, KEVIN, LARRY, PHIL, ROBERT, SEAN, SUSAN

Inventory Setup: Make Change and Press Enter

Enter employee's full name (Which will be used in time clock reports) and press <Enter>.

Click the *Change* button and click on the radio button next to *Rate of Pay*. Enter rate of pay and press <Enter>.

**Inventory Setup for Employees**

**Description**

☐ Employee Name: JASON

☐ Emp. Full Name: JASON PETERSON

Product Code: 81

☒ Hourly Rate of Pay: \$8.50

☐ Phone Number:

Employee List: BOB, BRITTANY, CHAD, CHARLES, CHRIS M, DAVID, JASON, KEVIN, LARRY, PHIL, ROBERT, SEAN, SUSAN

Inventory Setup: Enter New Data then Press

You have successfully added a new employee to your system. Now you will be able to clock this employee in and out in the Point-of-Sale and also assign him to different positions on open tickets.

**Note:** Setting your employee's rate of pay allows you to track labor costs for your shop. Although this feature is not intended as a replacement for your standard time clock, you can generate reports that will tell you the total hours an employee worked.

## Employee Permissions

PIN permissions restrict sensitive areas of the program, such as viewing sales reports and adjusting inventory levels to certain allowed employees. Logging into the inventory program with the owner or manager level passwords will allow permissions to be assigned. Once an employee is designated as store manager, they may assign permission levels to other employees. The use of Pins and permissions is optional in Pos-i-Lube, since general password restrictions will stay in place.

# To Designate a Store Manager

Select the employee you would like to designate as the store manager and then click *Set Permissions*.



Inventory Setup

Description

Employee Name

JASON

Emp. Full Name

JASON PETERSON

Product Code

81

Hourly Rate of Pay

\$8.50

Phone Number

BOB

BRITTANY

CHAD

CHARLES

CHRIS M

DAVID

JASON

KEVIN

LARRY

PHIL

ROBERT

SEAN

SUSAN

Inventory Setup

Add

Change

Delete

Set Permissions

Go Back

Before assigning any permissions, you must set a 4-digit PIN for the employee. Click the button next to *PIN* at the bottom left of the screen and type a unique PIN.

Next, check the box next to *Designate As Store Manager*. Assign any permissions you would like the manager to have.

Scroll

Print Current Page

Print All Pages

Go Back

PERMISSIONS for JASON PETERSON

5/2/2011

Store # 1029

ATLANTA

Page 1

Y/N

Activity

-----

YES

Designate As Store Manager

NO

PIN Required for Time Clock

YES

Perform opening procedures

YES

Perform closing procedures

YES

View Today's Sales

YES

View Past Sales

YES

Perform end of year Closeout

YES

Clock other Employee In/Out

YES

Save customer

YES

Cancel customer

YES

void an invoice

YES

Payout

YES

Clear a Customer's History

YES

Reprint a Receipt

YES

change Store Info

YES

change Fleet Info

YES

Test Cash Drawer

YES

Purge Customer History

YES

Add Inventory Items

YES

Change Inventory Items

YES

Delete Inventory Items

YES

Adjust Inventory Levels

YES

Add employees

YES

Change Employees

YES

Delete Employees

YES

Receive New Shipments

YES

Transfer Inventory

YES

Create Automatic Parts Order

YES

Receive Automatic Parts Order

YES

Print Inventory Reports

YES

Print End of Month Report

YES

Perform Autopoll

First Page

Page UP

Page DOWN

Last Page

IF you would like a report of the assigned permissions, click *Print*.

Once an employee has been designated as a store manager, he can log in with his PIN and assign permissions for other employees.

### Set Permissions for CHRIS MORRIS

**JASON PETERSON is Designated as Store Manager**

<div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;">Designate As Store Manager</div> <div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;">PIN Required for Time Clock</div> <input checked="" type="checkbox"/> Perform Opening Procedures <input checked="" type="checkbox"/> Perform Closing Procedures <input checked="" type="checkbox"/> View Today's Sales <input type="checkbox"/> View Past Sales <input type="checkbox"/> Perform End Of Year Closeout <input type="checkbox"/> Clock Other Employee In/Out <input type="checkbox"/> Save Customer <input checked="" type="checkbox"/> Cancel Customer <input checked="" type="checkbox"/> Void an Invoice <input type="checkbox"/> Payout <input type="checkbox"/> Clear a Customer's History <input checked="" type="checkbox"/> Reprint a Receipt <input type="checkbox"/> Change Store Info	<input type="checkbox"/> Change Fleet Info <input type="checkbox"/> Test Cash Drawer <input type="checkbox"/> Purge Customer History <input checked="" type="checkbox"/> Add Inventory Items <input checked="" type="checkbox"/> Change Inventory Items <input type="checkbox"/> Delete Inventory Items <input checked="" type="checkbox"/> Adjust Inventory Levels <input type="checkbox"/> Add Employees <input type="checkbox"/> Change Employees <input type="checkbox"/> Delete Employees <input checked="" type="checkbox"/> Receive New Shipments <input checked="" type="checkbox"/> Transfer Inventory <input checked="" type="checkbox"/> Create Automatic Parts Order <input checked="" type="checkbox"/> Receive Automatic Parts <input type="checkbox"/> Print Inventory Reports	<input checked="" type="checkbox"/> Print End Of Month Report <input type="checkbox"/> Perform AutoPoll <input type="checkbox"/> EMail Access <input type="checkbox"/> Close Scanner Program <input type="checkbox"/> Close Push Sales Program <input type="checkbox"/> Edit Past Time Clock <input checked="" type="checkbox"/> Change Message on Receipt
---	---	--

Set PIN for CHRIS M  
☐ PIN ( 4 digits )    \*\*\*\*

Check All

Clear All

Print

Go Back

## Store manager:

- A store manager may be assigned by the owner level password.
- Once a store manager is assigned, other employees may only be assigned lesser or equal permissions than him.
- Once a store manager is assigned, the store manager may assign permissions to other employees
- Only one store manager may be assigned to each location.
- If a store manager is not designated, only the owner and manager level passwords will be able to access or grant other employees' permissions.

## To Edit an Employee

From the employee screen, highlight the name of the employee you would like to edit. Click the *Change* button and then click on the radio button next to the line you would like to change. When you are done, press <Enter> and then *Go Back*.

## To Remove an Employee

From the employee screen, highlight the name of the employee you would like to remove from your list. Click the *Delete* button and then click *YES* to confirm.



# CHAPTER 3: Inventory Management

## New Shipments

All quantities that are added to inventory must be done from the New Shipments section. This section allows you to add quantities to your existing quantities.

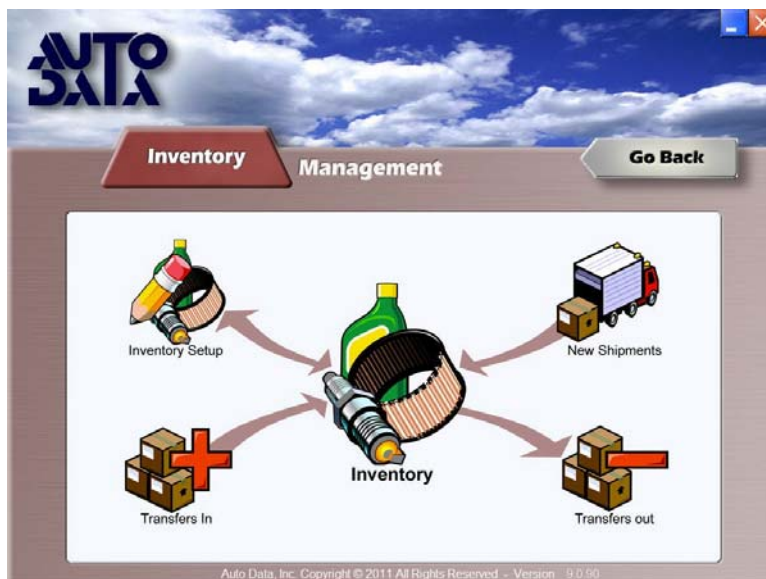
**Note:** Do not use the New Shipments feature to change your inventory values! This will cause your inventory to be tracked incorrectly. If your quantities are not correct and you need to adjust them, go to the Adjustments section.

## Adding Quantities

Go to the *Inventory* tab, click on *Management*



Enter your password and then click on *New Shipments*.



Select *Parts* or *Lubricants*.



Select the product code of the part you need.



Select the part number you wish to enter a new shipment for.



New Shipment

### Inventory Setup for PARTS

**Description**  
Part Number L44757  
Description OIL FILTER  
Product Code 1  
Add On Price \$5.00  
Your Cost \$3.49

Quantities			
Quantity On Hand	2		
Beginning Quantity	2		
Quantity Received	0		
Adjustments	1		
Transfers In / Out	2		
Quantity On Order	0		
Quantity In a Case	1		
Average Mo. Usage	2		

Sales History			
	Units	Gross	Net
Day to Date	0	\$0.00	\$0.00
Month to Date	3	\$15.00	\$4.53
Year to Date	9	\$45.00	\$13.59
Total to Date	382	\$1,910.00	\$576.82

**New Shipments**  
Enter Quantity Received:  

Go BackEnter Data

L16607  
L15839  
L16311  
L17662  
L25251  
L25277  
L25564  
L25692  
L25848  
L26127  
L28812  
L35476  
L35495  
L35581  
L35896  
L36136  
L38113  
L44757  
L46128  
T1FS  
T26  
T27  
T28  
T29  
T33  
T35  
T36  
T38  
T39  
T41  
T42  
T43  
T44  
T45  
T46

Click the *Enter Data* button and enter the quantity you received.



New Shipment

### Inventory Setup for PARTS

**Description**  
Part Number L44757  
Description OIL FILTER  
Product Code 1  
Add On Price \$5.00  
Your Cost \$3.49

Quantities			
Quantity On Hand	2		
Beginning Quantity	2		
Quantity Received	0		
Adjustments	1		
Transfers In / Out	2		
Quantity On Order	0		
Quantity In a Case	1		
Average Mo. Usage	2		

Sales History			
	Units	Gross	Net
Day to Date	0	\$0.00	\$0.00
Month to Date	3	\$15.00	\$4.53
Year to Date	9	\$45.00	\$13.59
Total to Date	382	\$1,910.00	\$576.82

**New Shipments**  
Enter Quantity Received: **##12**  

Go BackEnter Data

L16607  
L15839  
L16311  
L17662  
L25251  
L25277  
L25564  
L25692  
L25848  
L26127  
L28812  
L35476  
L35495  
L35581  
L35896  
L36136  
L38113  
L44757  
L46128  
T1FS  
T26  
T27  
T28  
T29  
T33  
T35  
T36  
T38  
T39  
T41  
T42  
T43  
T44  
T45  
T46

Press <Enter> to save your changes. Your quantity on hand will now reflect the new shipment you just entered.

Note: If you are entering a lubricant make sure to enter quantities in the same measurement that you are selling that lubricant. For example, if are entering a 55-gallon of bulk oil, enter that oil as quarts into your inventory.

32

# Enter Adjustments

To reconcile your actual physical inventory with the inventory listed in your software you must use the Enter Adjustments option. You may use this option when you are closing out for the month, or with an appropriate password, during the month.

**Note:** Do not use the *New Shipments* feature to change your inventory values! This will cause your inventory to be tracked incorrectly. If your quantities are not correct and you need to adjust them, go to the Adjustments section.

## Adjusting Inventory

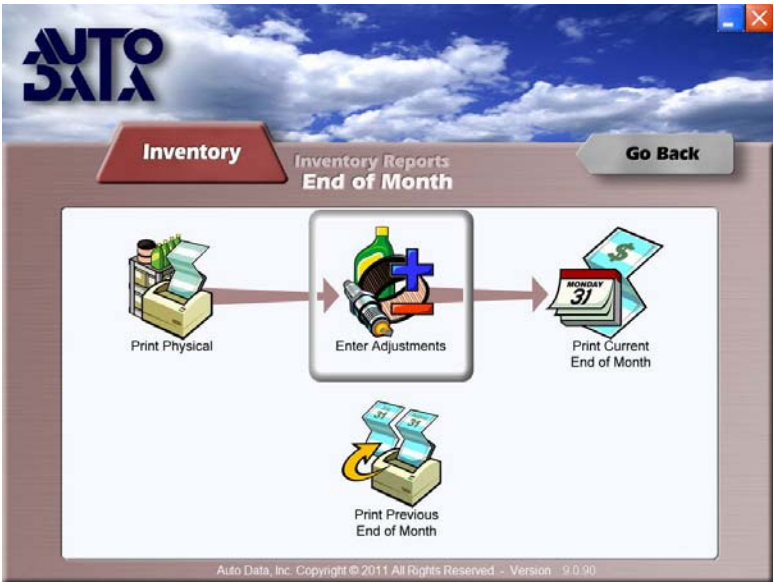
Go to the *Inventory* tab, click on *Reports* and enter your password.



Click on *End of Month*.




Click on *Enter Adjustments*.



Select *Parts* or *Lubricants*.



Select the correct product code.



Adjustments

**PRODUCT CATEGORIES**

**PARTS**

Select Range

☒ 1 - 20

☐ 21 - 40

☐ 41 - 54

Go Back

- ☐ 1 OIL FILTER
- ☐ 2 AIR FILTER
- ☐ 3
- ☐ 4
- ☐ 5 PCV VALVE
- ☐ 6 WIPER BLADE
- ☐ 7 FUEL FILTER
- ☐ 8 FUEL SYSTEM CLEANING
- ☐ 9
- ☐ 10
- ☐ 11
- ☐ 12
- ☐ 13
- ☐ 14 ENGINE FLUSH
- ☐ 15 OIL SYSTEM CLEANER
- ☐ 16
- ☐ 17 ENGINE SERVICE
- ☐ 18 DEXRON SIX
- ☐ 19 THROTTLE PLATE CLEANER
- ☐ 20 FUEL ADDITIVE SERVICE

Select the part that you need to change and click the *Enter Data* button.

Enter the number of this part that you physically have on hand and press <Enter>.



Adjustments

**Inventory Setup for PARTS**

**Description**

Part Number F54708

Description FUEL FILTER

Product Code 7

Retail Price \$49.99

Your Cost \$8.97

**Quantities**

Quantity On Hand 2

Beginning Quantity 2

Quantity Received 0

Adjustments 0

Transfers In / Out 0

Quantity On Order 8

Quantity In a Case 1

Average Mo. Usage 0

**Sales History**

	Units	Gross	Net
Day to Date	0	\$0.00	\$0.00
Month to Date	0	\$0.00	\$0.00
Year to Date	0	\$0.00	\$0.00
Total to Date	15	\$749.85	\$615.30

**Adjustments**

Enter New Quantity On Hand: ###2

Go Back Enter Data

- F33144
- F36266
- F43178
- F44663
- F44705
- F44710
- F44870
- F54611
- F54617
- F54618
- F54672
- F54686
- F54708**
- F54714
- F54719
- F54794
- F55055
- F55215
- F55360
- F55412
- F55464
- F55577
- F55590
- F59292C
- F63169
- F64621
- F64685
- F64702
- F64711
- F64728
- F64816
- F64817
- F65217
- F65277
- F65285

Your *Quantity On Hand* will now reflect the amount that you physically have in your inventory.



# Transferring Inventory Between Stores

It is possible to use Auto Data's inventory system to move inventory between stores. This feature allows you to track inventory that is taken from one store and sold in another.

## Transfer Out

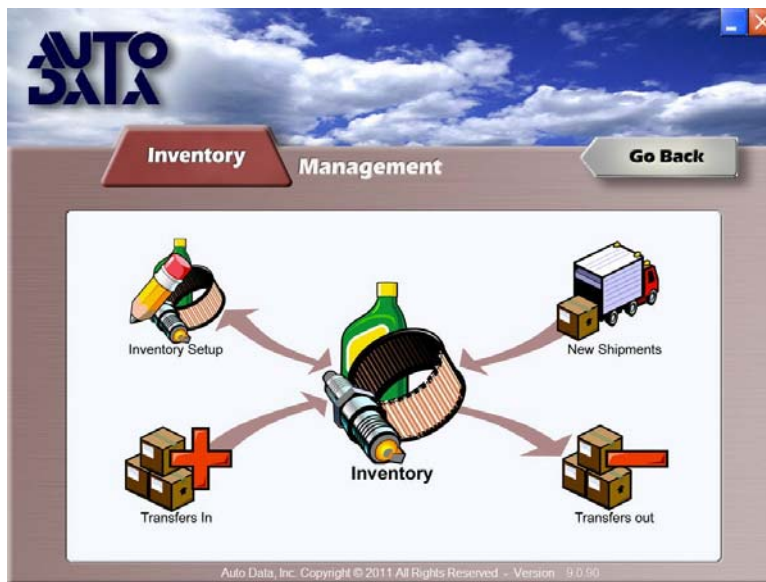
To perform a transfer, follow these steps at the store that is transferring inventory out:

1. From the main menu, click on the *Inventory* tab.
2. Click on *Management* and enter your password.
3. Select *Transfers out*.
4. Select *Parts* or *Lubricants* and the appropriate product code.
5. Select a particular part, and click on the *Enter Data* button.
6. Enter the amount to transfer out and press <Enter>.

## Transfer In

At the store that is receiving the transfer, you need to:

1. From the main menu, click on the *Inventory* tab.
2. Click on *Management* and enter your password.
3. Select *Transfers In*.
4. Select *Parts* or *Lubricants* and the appropriate product code.
5. Select a particular part, and click on the *Enter Data* button.
6. Enter the amount to transfer in and press <Enter>.





# Automatic Parts Reordering

With Auto Data's software you have the ability to automatically generate a parts order based on your store's average monthly sales and parts usage.

The Automatic Parts Reordering feature should be used when you have been open at least three months. To learn how to set or change your *Inventory Reorder Parameters*, see Chapter 1: *Store Setup*.

There are four steps in using the Automatic Parts Reorder feature.

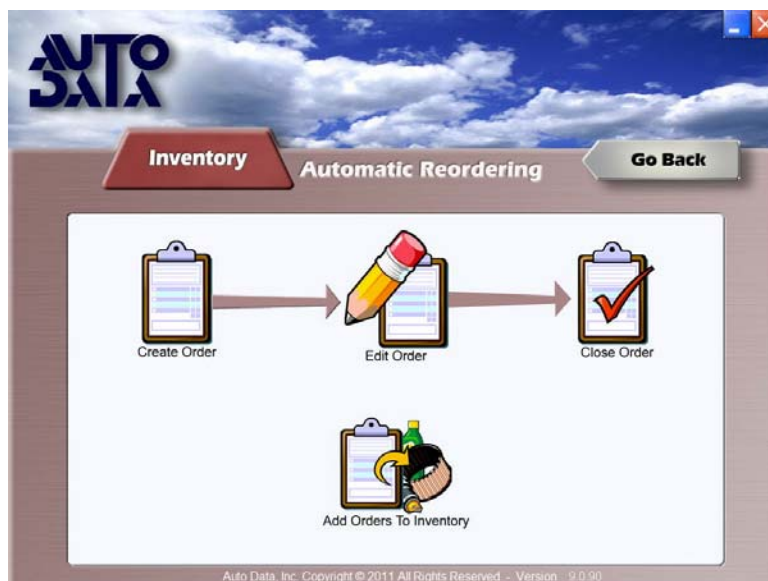
1. Create a parts order.
2. Edit the parts order if necessary.
3. Close the parts order.
4. Add the parts to inventory when you receive your shipment.

## Creating the Order

From the *Inventory* tab, click on *Automatic Parts Reordering* and enter your password.



Select *Create Order*.



Select *Parts* or *Lubricants*.

PRODUCT CATEGORIES

Create New Parts Order

  
Create Parts Order

☐ PARTS  
☐ LUBRICANTS

Go Back

Select the product code you wish to create an order for.

PRODUCT CATEGORIES

  
Create Parts Order

Select Range  
☒ 1 - 20  
☐ 21 - 40  
☐ 41 - 54

Go Back

PARTS

☐ 1 OIL FILTER  
☐ 2 AIR FILTER  
☐ 3  
☐ 4  
☐ 5 PCV VALVE  
☐ 6 WIPER BLADE  
☐ 7 FUEL FILTER  
☐ 8 FUEL SYSTEM CLEANING  
☐ 9  
☐ 10  
☐ 11  
☐ 12  
☐ 13  
☐ 14 ENGINE FLUSH  
☐ 15 OIL SYSTEM CLEANER  
☐ 16  
☐ 17 ENGINE SERVICE  
☐ 18 DEXRON SIX  
☐ 19 THROTTLE PLATE CLEANER  
☐ 20 FUEL ADDITIVE SERVICE

Answer Yes when asked if you want to create an order.

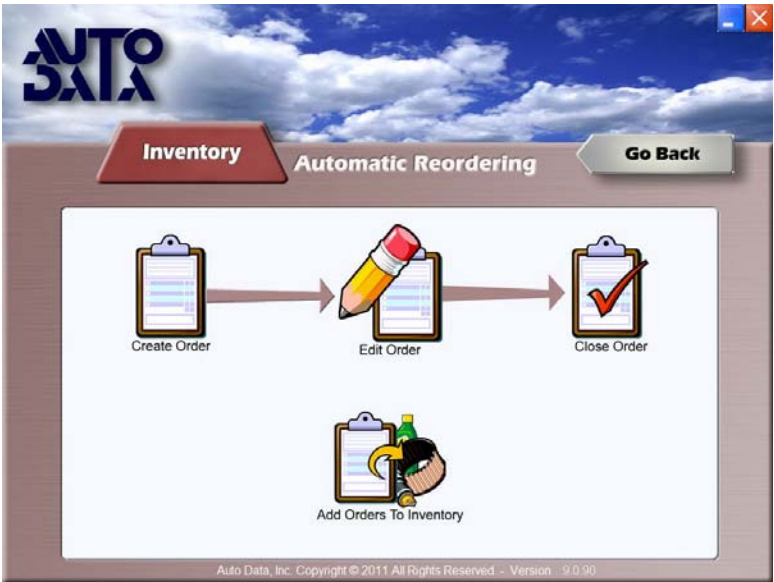


You will now get a message confirming that an order was created. If parts do not need to be ordered for the product code you selected, you will be notified that an order was not created.



# Editing the Parts Order

From the *Automatic Parts Reordering* menu, select *Edit Order*.



Select the order you wish to edit by clicking on it and pressing the *Edit* button.



Select the part number you would like to edit and press the *Change* button.

ORDER for Product Code 1 at Store # 1029 on 05/03/11

PART #	DESCRIPTION	COST	CASE	QUAN	QOH	AMU
L15607	OIL FILTER	\$6.97	1	1	2	3
L25848	OIL FILTER	\$7.99	1	1	0	1
L35581	OIL FILTER	\$6.97	1	1	9	10
T26	OIL FILTER	\$1.19	12	12	67	82
T29	OIL FILTER	\$1.15	12	12	120	135
T35	OIL FILTER	\$1.19	12	12	73	87
T36	OIL FILTER	\$1.19	12	36	46	83
T48	OIL FILTER	\$1.30	12	48	242	296
T51	OIL FILTER	\$2.99	12	24	5	26
T62	OIL FILTER	\$1.39	12	12	24	32
TFC521	OIL FILTER	\$1.19	12	24	109	137

Add, Change or Delete

Add

Change

Delete

Go Back

Enter the new amount you would like to order and press <Enter>.

ORDER for Product Code 1 at Store # 1029 on 05/03/11

PART #	DESCRIPTION	COST	CASE	QUAN	QOH	AMU
L15607	OIL FILTER	\$6.97	1	1	2	3
L25848	OIL FILTER	\$7.99	1	1	0	1
L35581	OIL FILTER	\$6.97	1	1	9	10
T26	OIL FILTER	\$1.19	12	12	67	82
T29	OIL FILTER	\$1.15	12	12	120	135
T35	OIL FILTER	\$1.19	12	12	73	87
T36	OIL FILTER	\$1.19	12	36	46	83
T48	OIL FILTER	\$1.30	12	48	242	296
T51	OIL FILTER	\$2.99	12	24	5	26
T62	OIL FILTER	\$1.39	12	12	24	32
TFC521	OIL FILTER	\$1.19	12	24	109	137

Change Quantity to Reorder

Enter the NEW Quantity to Reorder : 24

If you would like to add a part to your order, click the *Add* button and enter the appropriate information. Press <Enter> to jump from one field to the next.

ORDER for Product Code 1 at Store # 1029 on 05/03/11

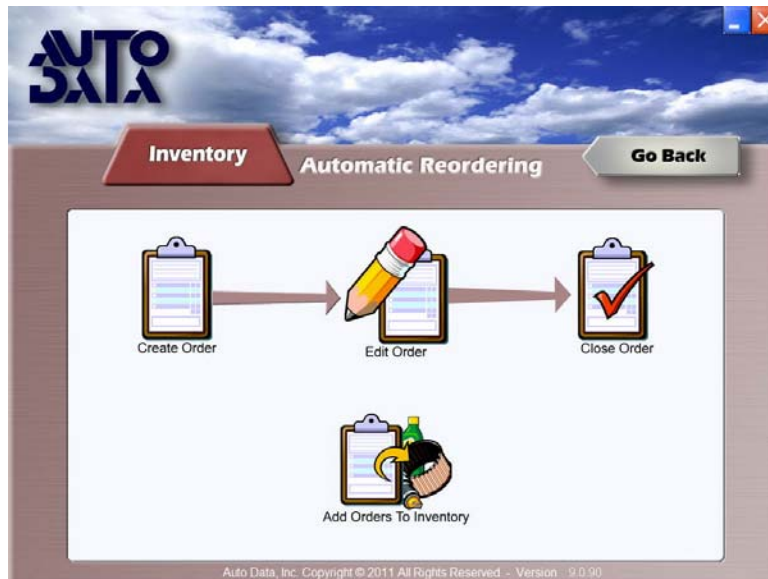
PART #	DESCRIPTION	COST	CASE	QUAN	QOH	AMU
Add Part to Order						
P2400000000						

If you would like to delete a part from your order, just click on the line you want to delete and then click the *Delete* button.



## Closing and Printing the Parts Order

After you are done editing your order, you need to close it. From the *Automatic Parts Reordering* menu, select *Close Order*.



You will be asked if you are finished with this order, if not select *No*, otherwise select *Yes*.

The screenshot shows a dialog box titled 'CLOSE PARTS ORDER' within the 'AUTOMATIC PARTS REORDERING' window. The dialog box contains the following text: 'Are you finished ordering ALL of the Parts you want?', 'If not, click NO, and go back to CREATE ORDER.', 'This will close out your parts order and you will not be able to order any more parts today.', and 'Do You Wish to CLOSE this order?'. At the bottom of the dialog box, there are three buttons: a green button with a white question mark, a white button labeled 'Yes', and a yellow button labeled 'No'.

If you selected Yes, then a prompt will appear that tells you that your order was closed successfully, click OK.

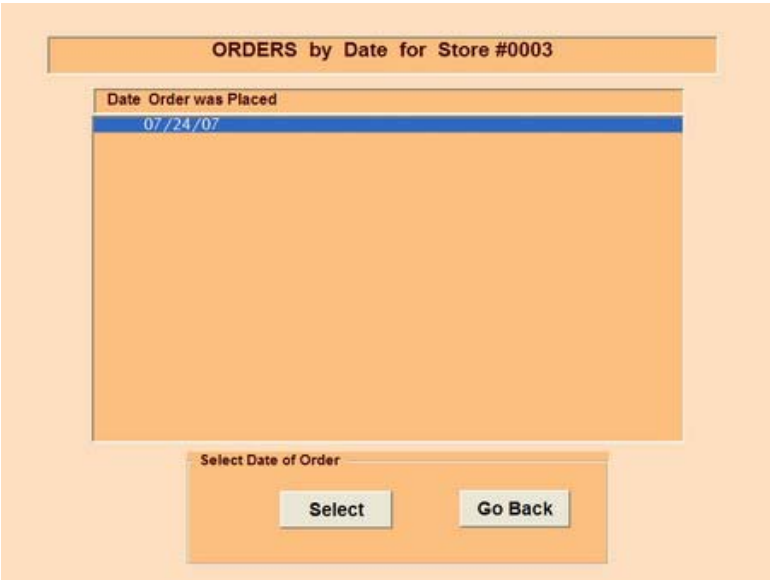


The next screen will be a report of the orders you placed. If you would like to print your order, click *Print All Pages*.

## Add Orders to Inventory

Once you receive your orders, you'll select *Add Orders to Inventory* from the main *Automatic Parts Reordering menu*.

Click on the order that you would like to add to your inventory and click *Select*.



Next click the product code of the order you want to add and click Select.

ORDER for Store #0003 on 07/24/07

Product Code	Description
1	OIL FILTER

Select Product Code to ADD

Select

Go Back

Click the *Add* button for each part that you wish to add to the inventory. If you didn't receive a particular part, you can delete it from the order by highlighting it and clicking *Delete*.

ORDER for Product Code 1 at Store # 0003 on 07/24/07

PART #	DESCRIPTION	COST	CASE	QUAN
84083	OIL FILTER	\$8.78	1	0
84187	OIL FILTER	\$13.15	1	3
84210	OIL FILTER	\$6.48	1	2
84302	OIL FILTER	\$10.00	1	2
85121	OIL FILTER	\$6.17	1	2
85191	OIL FILTER	\$6.68	1	2
85223	OIL FILTER	\$8.42	1	2
85228	OIL FILTER	\$10.97	1	2
85355	OIL FILTER	\$6.11	1	2
M4006	OIL FILTER	\$1.42	1	15
M4011	OIL FILTER	\$1.36	1	17
M4459	OIL FILTER	\$1.54	1	2
M4620	OIL FILTER	\$1.49	1	12
M4651	OIL FILTER	\$1.60	1	28
M4670	OIL FILTER	\$1.36	1	27
M4872	OIL FILTER	\$5.11	1	3
M5288	OIL FILTER	\$1.42	1	58
PH48	OIL FILTER	\$3.00	1	4
PO28	OIL FILTER	\$1.96	1	7
PO29	OIL FILTER	\$1.73	1	21
PO45	OIL FILTER	\$2.16	1	7

Add Parts Order to Inventory

Delete

Add

Go Back

If you would like to add a part, but would like to enter a different quantity than what was originally on the order, click *No* when prompted if you want to add the quantity to the part number.

ORDER for Product Code 1 at Store # 1029 on 05/03/11

PART #	DESCRIPTION	COST	CASE	QUAN	QOH	AMU
L15607	OIL FILTER	\$6.97	1	1	2	3
L25848				1	0	1
L35581				1	9	10
T26				12	67	82
T29				12	120	135
T35				12	73	87
T36				36	46	83
T48				48	242	296
T51				24	5	26
T62				12	24	32
TFC521				24	109	137

Add Order to Inventory

Add a Quantity of 1 to Part Number L15607

?

Yes

No

Add Parts Order to Inventory

Delete

Add

Go Back

Then, enter the quantity you would like to add.

ORDER for Product Code 1 at Store # 1029 on 05/03/11

PART #	DESCRIPTION	COST	CASE	QUAN	QOH	AMU
L15607	OIL FILTER	\$6.97	1	1	2	3
L25848	OIL FILTER	\$7.99	1	1	0	1
L35581	OIL FILTER	\$6.97	1	1	9	10
T26	OIL FILTER	\$1.19	12	12	67	82
T29	OIL FILTER	\$1.15	12	12	120	135
T35	OIL FILTER	\$1.19	12	12	73	87
T36	OIL FILTER	\$1.19	12	36	46	83
T48	OIL FILTER	\$1.30	12	48	242	296
T51	OIL FILTER	\$2.99	12	24	5	26
T62	OIL FILTER	\$1.39	12	12	24	32
TFC521	OIL FILTER	\$1.19	12	24	109	137

Change Quantity to Reorder

Enter the NEW Quantity to Reorder :

Once you have added all the parts you received to your inventory, you can delete the rest of the parts and consequently clear the order.

# CHAPTER 4: Daily Procedures

## Opening the Day

Before cashing out customers, you must go through opening procedures every day. To begin, click on *Opening Procedures* on the main menu.



Click on the radio button and enter your beginning cash drawer change. Press <Enter> on your keyboard and then click **Save**. When you click **Save**, your machine will verify that it has an available phone line or internet connection in case you need to connect with technical support at Auto Data.

The screenshot shows the 'Opening Procedures' screen. At the top, there are tabs for 'Cash' and 'Opening Procedures', and a 'Go Back' button. The main area contains two radio buttons. The first is selected and labeled 'Enter Beginning Change :', with a red box displaying '\$100.00'. The second is labeled 'Enter a message to print on every laser receipt' and has a text input field containing 'HAVE A GREAT DAY'.

Once your opening amount is saved, you are open for the day.

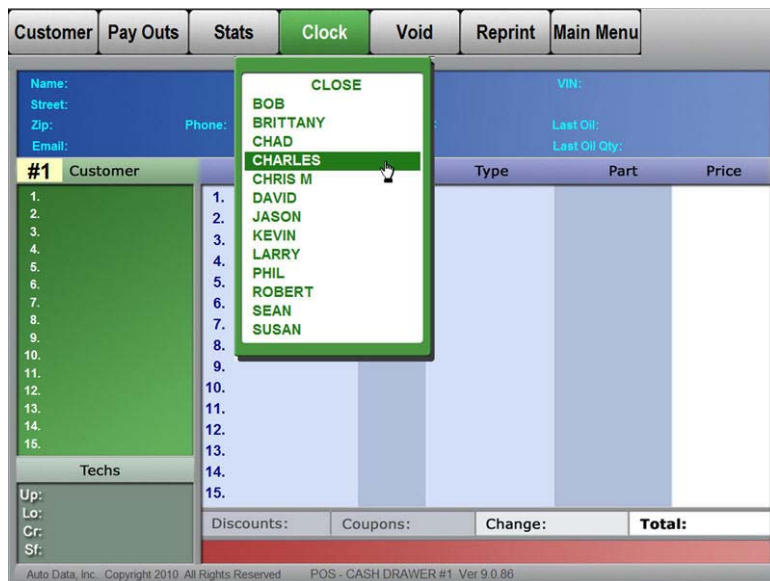
Now, you can also enter a custom message that will print at the top of the customer's receipt.

# Time Clock

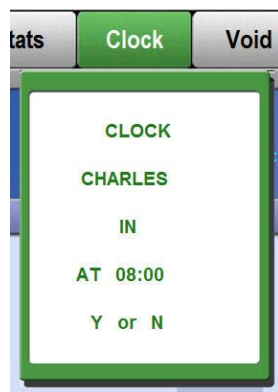
The Time Clock feature of Auto Data's software allows you to track labor hours per employee and it allows you to track labor costs anytime during the day using the *Stats* menu.

## Clocking In & Out

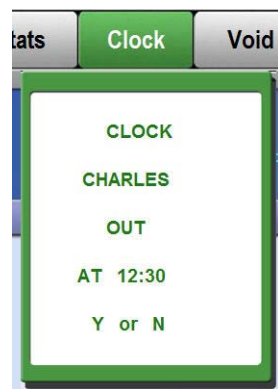
To clock employees in and out, go to the *Clock* menu in Point-of-Sale and click on the employee's name.



You will be asked if you want to clock this employee in. Press <Y> on your keyboard to confirm.



When you are ready to clock this employee out for a break or for the day, simply follow the same process. However, the time clock will ask you to clock that employee out rather than in.





# Cashing out Customers

## Regular Customer: Step 1

The first step of cashing out your regular customer is to enter the customer's personal information, including name, address, and mileage.

From the opening screen in Point-of-Sale select Customer and then select Full Customer.

Customer Pay Outs Stats Clock Void Reprint Main Menu

**CLOSE**  
FULL CUSTOMER  
FLEET CUSTOMER  
QUICK CUSTOMER  
REVIEW CUSTOMER  
FIND BY LAST NAME

Acct #: VIN:  
Car ID: Last Oil:  
Mileage: Last Oil Qty:

Product	Quantity	Type	Part	Price
1.	2.	3.	4.	5.
6.	7.	8.	9.	10.
11.	12.	13.	14.	15.

Discounts: Coupons: Change: Total:

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If not using a scanner, you must first enter the customer's license plate number or VIN. All of the customer's vehicle information and history is stored using this number.

Enter the license plate number and press <Enter>.

Customer Pay Outs Stats Clock Void Reprint Main Menu

Name: Acct #: VIN: Touch OFF  
Street: Car ID:  
Zip: Phone: Mileage: Last Oil:  
Email: Last Oil Qty:

#1 Customer 16 - 30

1. 2. 3. 4. 5. 6. 7. 8. 9. 10. 11. 12. 13. 14. 15.

**Enter VIN or License**  
X Y R 6 8 0  
press Enter when finished - Esc to quit

Discounts: Coupons: Change: Total:

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Enter the VIN number, if available. If not, press <Enter> to bypass VIN prompt.

CustomerPay OutsStatsClockVoidReprintMain Menu

Name:NEW CUSTOMERAcct #: XYR680VIN:Touch OFF

Street:Car ID:

Zip:Phone:Mileage: 0Last Oil:

Email:Last Oil Qty: 0

#1Customer16 - 30ProductQuantityTypePartPrice

1.2.3.4.5.6.7.8.9.10.11.12.13.14.15.

1.2.3.4.5.6.7.8.9.10.11.12.13.14.15.

Techs

Up:Lo:Cr:Sf:

Enter VIN Only

press Enter when finished - Esc to quit

Discounts:Coupons: \$0.00Change:Total: \$0.00

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For a new customer, select *Enter Customer*. To browse your customer list, select *Find by Last Name*.

CustomerPay OutsStatsClockVoidReprintMain Menu

ENTER CUSTOMER

FIND BY LAST NAME

Acct #: XYR680VIN:

Car ID:

Mileage: 0Last Oil:

Last Oil Qty: 0

#1CustomerProductQuantityTypePartPrice

1.2.3.4.5.6.7.8.9.10.11.12.13.14.15.

1.2.3.4.5.6.7.8.9.10.11.12.13.14.15.

Techs

Up:Lo:Cr:Sf:

Discounts:Coupons: \$0.00Change:Total: \$0.00

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If this is a new customer, enter <R>, for Mr. or <S>. for Ms. and press <Enter>.

CustomerPay OutsStatsClockVoidReprintMain Menu

Name: MR MR or MSAcct #: XYR680VIN:Touch OFF

Street:Car ID:Phone:Mileage: 0Last Oil:Last Oil Qty: 0

Email:

#1 Customer16 - 30

|     | Product | Quantity | Type | Part | Price |
|-----|---------|----------|------|------|-------|
| 1.  | 1.      |          |      |      |       |
| 2.  | 2.      |          |      |      |       |
| 3.  | 3.      |          |      |      |       |
| 4.  | 4.      |          |      |      |       |
| 5.  | 5.      |          |      |      |       |
| 6.  | 6.      |          |      |      |       |
| 7.  | 7.      |          |      |      |       |
| 8.  | 8.      |          |      |      |       |
| 9.  | 9.      |          |      |      |       |
| 10. | 10.     |          |      |      |       |
| 11. | 11.     |          |      |      |       |
| 12. | 12.     |          |      |      |       |
| 13. | 13.     |          |      |      |       |
| 14. | 14.     |          |      |      |       |
| 15. | 15.     |          |      |      |       |

Techs

Up:Lo:Cr:Sf:

Discounts:Coupons: \$0.00Change:Total: \$0.00

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Enter the customer's first name, press <Enter> then enter last name and press <Enter>.

CustomerPay OutsStatsClockVoidReprintMain Menu

Name: MR JOHN SMITH\*\*\*\*\*Acct #: XYR680VIN:Touch OFF

Street:Car ID:Phone:Mileage: 0Last Oil:Last Oil Qty: 0

Email:

#1 Customer16 - 30

|     | Product | Quantity | Type | Part | Price |
|-----|---------|----------|------|------|-------|
| 1.  | 1.      |          |      |      |       |
| 2.  | 2.      |          |      |      |       |
| 3.  | 3.      |          |      |      |       |
| 4.  | 4.      |          |      |      |       |
| 5.  | 5.      |          |      |      |       |
| 6.  | 6.      |          |      |      |       |
| 7.  | 7.      |          |      |      |       |
| 8.  | 8.      |          |      |      |       |
| 9.  | 9.      |          |      |      |       |
| 10. | 10.     |          |      |      |       |
| 11. | 11.     |          |      |      |       |
| 12. | 12.     |          |      |      |       |
| 13. | 13.     |          |      |      |       |
| 14. | 14.     |          |      |      |       |
| 15. | 15.     |          |      |      |       |

Techs

Up:Lo:Cr:Sf:

Discounts:Coupons: \$0.00Change:Total: \$0.00

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Enter the customer's street address and press <Enter>. Enter the zip code and press <Enter>. Enter the phone number and press <Enter>.

CustomerPay OutsStatsClockVoidReprintMain Menu

Name: MR JOHN SMITHAcct #: XYR680VIN: Touch OFF

Street: 123 PEACHTREE ST#####Car ID:

Zip: 30497Phone: 770-812-5476Mileage: 0Last Oil:

Email:Last Oil Qty: 0

#1Customer16 - 30ProductQuantityTypePartPrice

1.2.3.4.5.6.7.8.9.10.11.12.13.14.15.

1.2.3.4.5.6.7.8.9.10.11.12.13.14.15.

Techs

Up:Lo:Cr:Sf:

Discounts:Coupons: \$0.00Change:Total: \$0.00

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Enter the customer's mileage and press <Enter>.

CustomerPay OutsStatsClockVoidReprintMain Menu

Name: MR. JOHN SMITHAcct #: XYR680VIN: Touch OFF

Street: 123 PEACHTREE STCar ID:

Zip: 30497Phone: 770-812-5476Mileage: #52000Last Oil:

Email:Last Oil Qty: 0

#1Customer16 - 30ProductQuantityTypePartPrice

1. SMITH2.3.4.5.6.7.8.9.10.11.12.13.14.15.

1.2.3.4.5.6.7.8.9.10.11.12.13.14.15.

Techs

Up:Lo:Cr:Sf:

Discounts:Coupons: \$0.00Change:Total: \$0.00

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# Regular Customer: Step 2: The Work Order

Once you have entered the customer's personal information you will need to enter the vehicle information to create a work order. Creating the work order allows you to view the recommended parts and manufacturer's severe service recommendations for the vehicle.

## Vehicle Information

Select the *Car I.D.* menu. Select the year, make and model: if necessary, select the engine size.

|  |       |            |         |                              |        |       |          |
|--|-------|------------|---------|------------------------------|--------|-------|----------|
| Services   | Fleet | Name       | History | <b>Car ID</b>                | Fluids | Techs | Continue |
| Name: MR. JOHN SMITH<br>Street: 123 PEACHTREE ST<br>Zip: 30497 Phone: 770-812-3456<br>Email: |       | VIN:       |         | Last Oil:<br>Last Oil Qty: 0 |        |       |          |
| #1 Customer  |       | Product    |         | Part Price                   |        |       |          |
| 1. SMITH   |       | 1.         |         | 2012                         |        |       |          |
| 2.   |       | 2.         |         | 2011                         |        |       |          |
| 3.   |       | 3.         |         | 2010                         |        |       |          |
| 4.   |       | 4.         |         | 2009                         |        |       |          |
| 5.   |       | 5.         |         | 2008                         |        |       |          |
| 6.   |       | 6.         |         | 2007                         |        |       |          |
| 7.   |       | 7.         |         | 2006                         |        |       |          |
| 8.   |       | 8.         |         | 2005                         |        |       |          |
| 9.   |       | 9.         |         | 2004                         |        |       |          |
| 10.  |       | 10.        |         | 2003                         |        |       |          |
| 11.  |       | 11.        |         | 2002                         |        |       |          |
| 12.  |       | 12.        |         | 2001                         |        |       |          |
| 13.  |       | 13.        |         | 2000                         |        |       |          |
| 14.  |       | 14.        |         | 1999                         |        |       |          |
| 15.  |       | 15.        |         | 1998                         |        |       |          |
| Techs  |       | Discounts: |         | 1997                         |        |       |          |
| Up:  |       |            |         | 1996                         |        |       |          |
| Lo:  |       |            |         | 1995                         |        |       |          |
| Cr:  |       |            |         | 1994                         |        |       |          |
| St:  |       |            |         | 1993                         |        |       |          |
|  |       |            |         | 1992                         |        |       |          |
|  |       |            |         | 1991                         |        |       |          |
|  |       |            |         | 1990                         |        |       |          |
|  |       |            |         | MORE                         |        |       |          |
|  |       |            |         | CLOSE                        |        |       |          |
|  |       |            |         | Total: \$0.00                |        |       |          |

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## Requested Lubricants

The next menu is a list of oils. Highlight the requested oil, and press <Enter>.

|  |       |            |         |                              |        |       |          |
|--|-------|------------|---------|------------------------------|--------|-------|----------|
| Services   | Fleet | Name       | History | <b>Car ID</b>                | Fluids | Techs | Continue |
| Name: MR. JOHN SMITH<br>Street: 123 PEACHTREE ST<br>Zip: 30497 Phone: 770-812-3456<br>Email: |       | VIN:       |         | Last Oil:<br>Last Oil Qty: 0 |        |       |          |
| #1 Customer  |       | Product    |         | Part Price                   |        |       |          |
| 1. SMITH   |       | 1.         |         | MOTOR OIL                    |        |       |          |
| 2.   |       | 2.         |         | 0W20                         |        |       |          |
| 3.   |       | 3.         |         | 0W40                         |        |       |          |
| 4.   |       | 4.         |         | 5W20                         |        |       |          |
| 5.   |       | 5.         |         | 5W30                         |        |       |          |
| 6.   |       | 6.         |         | 5W30 DEXOS                   |        |       |          |
| 7.   |       | 7.         |         | 5W30 GTX                     |        |       |          |
| 8.   |       | 8.         |         | 5W30 SYNTH                   |        |       |          |
| 9.   |       | 9.         |         | 10W30                        |        |       |          |
| 10.  |       | 10.        |         | 15W40                        |        |       |          |
| 11.  |       | 11.        |         | 20W50                        |        |       |          |
| 12.  |       | 12.        |         | 80W140 SYNTH                 |        |       |          |
| 13.  |       | 13.        |         | ANTIFREEZE                   |        |       |          |
| 14.  |       | 14.        |         | CUST OWN OIL                 |        |       |          |
| 15.  |       | 15.        |         | GL-5                         |        |       |          |
| Techs  |       | Discounts: |         | GL-5 SYNTH                   |        |       |          |
| Up:  |       |            |         | GREASE                       |        |       |          |
| Lo:  |       |            |         | HIGH MILEAGE                 |        |       |          |
| Cr:  |       |            |         | OEM SPEC                     |        |       |          |
| St:  |       |            |         | POWER STER                   |        |       |          |
|  |       |            |         | WASHER                       |        |       |          |
|  |       |            |         | WD-40                        |        |       |          |
|  |       |            |         | Coupons: \$0.00              |        |       |          |
|  |       |            |         | Change:                      |        |       |          |
|  |       |            |         | Total: \$0.00                |        |       |          |

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## Printing & Viewing The Work Order

Once you have entered the Car I.D. and selected the oil, you can choose to:

1. Enter a new Car I.D., if you made a mistake entering it.
2. View the PM (Preventative Maintenance) Schedule\*
3. View the work order. From this screen you can also print the work order.
4. View oil light re-set instructions (if highlighted red, the current vehicle has an oil light re-set feature)\*
5. View a diagram of the engine\*
6. View a diagram of the chassis\*
7. Select specific services that the customer is requesting, by selecting Services from the Car I.D. menu
8. Re-select the lubricant, by selecting Lubricants from the Car ID menu.
9. Re-print static sticker, if a different oil was selected

| Services   | Fleet    | Name    | History | Car ID                                       | Fluids          | Techs   | Continue      |
|--|----------|---------|---------|--|-----------------|---------|---------------|
| Name: MR. JOHN SMITH<br>Street: 123 PEACHTREE ST<br>Zip: 30497 Phone: 770-812-3456<br>Email: |          |         |         | VIN:<br>CORD<br>Last Oil:<br>Last Oil Qty: 0 |                 |         |               |
| #1   | Customer | Product | Part    | Price  |                 |         |               |
| 1.   | SMITH    | 1.      |         |  |                 |         |               |
| 2.   |          | 2.      |         |  |                 |         |               |
| 3.   |          | 3.      |         |  |                 |         |               |
| 4.   |          | 4.      |         |  |                 |         |               |
| 5.   |          | 5.      |         |  |                 |         |               |
| 6.   |          | 6.      |         |  |                 |         |               |
| 7.   |          | 7.      |         |  |                 |         |               |
| 8.   |          | 8.      |         |  |                 |         |               |
| 9.   |          | 9.      |         |  |                 |         |               |
| 10.  |          | 10.     |         |  |                 |         |               |
| 11.  |          | 11.     |         |  |                 |         |               |
| 12.  |          | 12.     |         |  |                 |         |               |
| 13.  |          | 13.     |         |  |                 |         |               |
| 14.  |          | 14.     |         |  |                 |         |               |
| 15.  |          | 15.     |         |  |                 |         |               |
| Techs  |          |         |         |  |                 |         |               |
| Up:  |          |         |         | Discounts:                                   | Coupons: \$0.00 | Change: | Total: \$0.00 |
| Lo:  |          |         |         |  |                 |         |               |
| Cr:  |          |         |         |  |                 |         |               |
| Sf:  |          |         |         |  |                 |         |               |

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**\*Note:** You can only view engine, chassis diagrams, oil light re-set instructions and PM schedules if you subscribed to these databases. If you do not have access to these features contact the Sales department at Auto Data.

## Continue

or

Leave this customer in your customer waiting list until you are ready to proceed to Cash-Out. To proceed to another customer, press <Insert> on your keyboard, click on the customer list on the left side of the screen or right-click your mouse to open the customer list and then select the customer you would like to go to. If you want to start a new customer, open the customer list and select an empty customer number and this will take you back to the main Point-of-Sale menu.



## Regular Customer: Step 3: Building a Receipt

After all of the customer's personal and vehicle information is entered, the next step is to enter the fluids, services, and tech information.

### Entering Fluids

1. From the top menu select *Fluids*. On your paper work order you will see the tech notes regarding which fluids were replaced and/or recommended to be replaced.
2. Scroll through your *Fluids* menu and press <Enter> for any fluid that is marked on the work order. Then press <Enter> until you find the appropriate choice for that particular fluid.
3. To close this menu, scroll to the top until the word *Close* appears, and press <Enter>.

The screenshot shows the POS interface with the 'Fluids' menu open. The top menu bar includes 'Services', 'Fleet', 'Name', 'History', 'Car ID', 'Fluids' (highlighted), 'Techs', and 'Continue'. The customer information section displays: Name: MR. JOHN SMITH, Street: 123 PEACHTREE ST, Zip: 30497, Phone: 770-812-3456, Email: . The main area is divided into a list of 15 items (1-15) and a 'Techs' section. A pop-up menu is overlaid on the list, showing a list of 21 items (1-21) with status indicators (e.g., 'COMPLETED', 'SEALED', 'REPLACED', 'FULL', 'CHECKED', 'ADJUSTED'). The 'CLOSE' option is at the top of the pop-up. The bottom status bar shows 'Discounts: ', 'Coupons: \$0.00', 'Change: ', and 'Total: \$0.00'. The footer text reads 'Auto Data, Inc. Copyright 2010 All Rights Reserved POS - CASH DRAWER #1 Ver 9.0.86'.

### Entering Tech Information

1. From the top menu select *Techs*.
2. Your tech information will be entered in this order: *Upper, Lower, Courtesy, and Safety*.
3. Highlight a tech's name and press <Enter> to assign him to the different positions.
4. Notice in the bottom left corner of your Point-of-Sale screen how each name is marked to indicate which position he/she performed. You only need to assign the positions you use.
5. After assigning techs, scroll to the top of the menu, select *Close* and press <Enter>.

The screenshot shows the POS interface with the 'Techs' menu open. The top menu bar includes 'Services', 'Fleet', 'Name', 'History', 'Car ID', 'Fluids', 'Techs' (highlighted), and 'Continue'. The customer information section displays: Name: MR. JOHN SMITH, Street: 123 PEACHTREE ST, Zip: 30497, Phone: 770-812-3456, Email: . The main area is divided into a list of 15 items (1-15) and a 'Techs' section. A pop-up menu is overlaid on the list, showing a list of 3 items (CHARLES, DAVID, SUSAN) with status indicators (e.g., '= Up', '= Lo', '= Cr'). The 'CLOSE' option is at the top of the pop-up. The bottom status bar shows 'Discounts: ', 'Coupons: \$0.00', 'Change: ', and 'Total: \$0.00'. The footer text reads 'Auto Data, Inc. Copyright 2010 All Rights Reserved POS - CASH DRAWER #1 Ver 9.0.86'.

# Entering Services

- 1. From the top menu select *Services*.
- 2. Select each service that was performed on the vehicle. Make sure to complete each section of each service.

| Product         | Quantity | Type | Part   | Price   |
|-----------------|----------|------|--------|---------|
| 1. FULL SERVE   | 4.50     | 5W30 | L16311 | \$29.99 |
| 2. Oil Filter + | 1.00     |      |        | \$10.00 |
| 3.              |          |      |        |         |
| 4.              |          |      |        |         |
| 5.              |          |      |        |         |
| 6.              |          |      |        |         |
| 7.              |          |      |        |         |
| 8.              |          |      |        |         |
| 9.              |          |      |        |         |
| 10.             |          |      |        |         |
| 11.             |          |      |        |         |
| 12.             |          |      |        |         |
| 13.             |          |      |        |         |
| 14.             |          |      |        |         |
| 15.             |          |      |        |         |

Discounts: Coupons: \$0.00 Change: Total: \$0.00

Once you have entered each of the services, Scroll to the top of the menu, until the word *Close* appears. Press <Enter>.

Scroll to the far right and select *Continue*.

# Regular Customer: Step 4: Printing the Receipt

The final step of cashing out a customer includes saving the customer's e-mail address, entering discounts or coupons, comments, and finally, printing the receipt.

## Saving the Customer's E-mail Address (Optional)

- 1. From the top menu select *Email*.
- 2. Type the customer's e-mail address. Shortcut keys are available for common extensions. Press <Enter> when done.

Enter E-MAIL Address

MRJOHNSMITH@HOTMAIL.COM

press Enter when finished - Esc to quit

F1 @ (AT SIGN) F2 \_ (UNDERScore) F3 @SBCGLOBAL.NET F4 @COMCAST.NET

F5 @YAHOO.COM F6 @HOTMAIL.COM F7 @GMAIL.COM F8 @AOL.COM

F9 @MSN.COM F10 @EARTHLINK.NET F11 @BELLSouth.NET F12 @VERIZON.NET

| Product    | Quantity | Type | Part | Price   |
|------------|----------|------|------|---------|
| 1. HONDA A |          |      |      | \$29.99 |
| 2.         |          |      |      | \$10.00 |
| 3.         |          |      |      | \$24.99 |
| 4.         |          |      |      |         |
| 5.         |          |      |      |         |
| 6.         |          |      |      |         |
| 7.         |          |      |      |         |
| 8.         |          |      |      |         |
| 9.         |          |      |      |         |
| 10.        |          |      |      |         |
| 11.        |          |      |      |         |
| 12.        |          |      |      |         |
| 13.        |          |      |      |         |
| 14.        |          |      |      |         |
| 15.        |          |      |      |         |

Discounts: Coupons: \$0.00 Change: Total: \$0.00

## Entering Discounts

1. From the top menu select *Discount*.
2. Select the appropriate discount and press <Enter>.
3. If you need to remove this discount, open the *Discount* menu again, and select a different discount

The screenshot shows the POS system interface with the **Discount** menu open. The menu options are: **CLOSE**, **10% DISCOUNT** (highlighted), **25% EMPLOYEE**, and **INTERNET**. The background shows a customer entry form for MR. JOHN SMITH, a product list with items like FULL SERVE, OIL FILTER, and AIR FILTER, and a total of \$0.00.

Note: Only one discount is allowed per transaction.

## Entering Coupons

1. From the top menu, select *Coupon*.
2. Select the appropriate coupon(s) and press <Enter>. Notice that each time you select a coupon arrows appear beside it, indicating it is currently selected.
3. To remove a coupon, re-open the *Coupon* menu and de-select the coupon by highlighting it and pressing <Enter>. Select *Close* at the top of the menu.
4. Select *Total* to continue.

The screenshot shows the POS system interface with the **Coupon** menu open. The menu options are: **CLOSE**, **\$1**, **\$2** (highlighted with arrows), **\$5**, **\$10**, **\$15**, **\$20.00**, **FLEET**, **MONEY MAILER**, **PREMIUM**, **ROTATE PKG**, and **VAL-PAK**. The background shows the same customer entry form and product list as the previous screenshot, with a total of \$0.00.

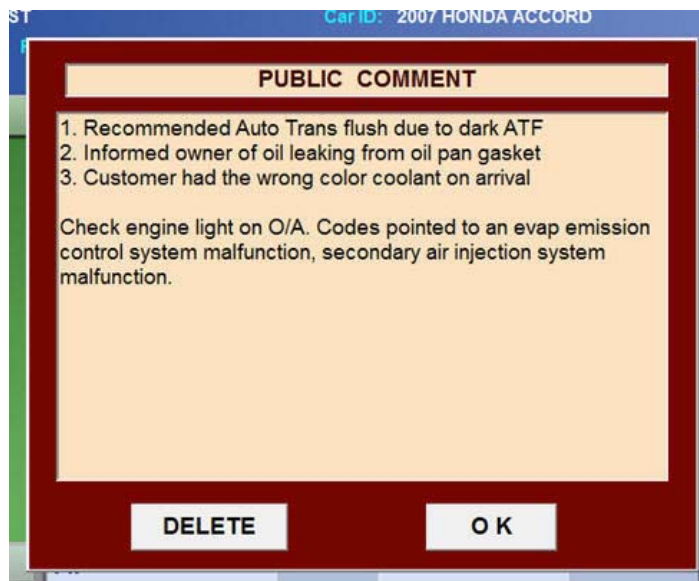
Note: You are allowed up to 5 coupons per transaction.

## Comments

1. From the top menu, select *Comment*.
2. Highlight any comment that is appropriate for the customer's vehicle, and press <Enter>.
3. You are allowed up to five comments per receipt.
4. Each of these comments is saved in the customer's history.
5. If you need to add a comment that is not in the list, you can add a *PUBLIC COMMENT* or a *PRIVATE COMMENT*.



*PUBLIC COMMENTS* can be several lines long and will print on customers receipt and be saved in the customer's history.



*PRIVATE COMMENTS* can also be several lines long but will not print on customers receipt. They are for use by technicians and will be saved in the customer's history.



6. If you need to re-select comments, select *Delete Comments Below* to clear out currently selected comments. After this, you can re-select your comments.

|         |        |         |       |                |          |        |       |
|---------|--------|---------|-------|----------------|----------|--------|-------|
| Go Back | No Tax | License | Email | <b>Comment</b> | Discount | Coupon | Total |
|---------|--------|---------|-------|----------------|----------|--------|-------|

|   |                 |
|---|-----------------|
| <b>Name:</b> MR. JOHN SMITH<br><b>Street:</b> 123 PEACHTREE ST<br><b>Zip:</b> 30497 <b>Phone:</b> 770-812-3456<br><b>Email:</b> |                 |
| <b>#1</b> Customer  | Product         |
| 1. HONDA ACCORD   | 1. FULL SERV    |
| 2.  | 2. Oil Filter + |
| 3.  | 3. AIR FILTER   |
| 4.  | 4.              |
| 5.  | 5.              |
| 6.  | 6.              |
| 7.  | 7.              |
| 8.  | 8.              |
| 9.  | 9.              |
| 10.   | 10.             |
| 11.   | 11.             |
| 12.   | 12.             |
| 13.   | 13.             |
| 14.   | 14.             |
| 15.   | 15.             |
| <b>Techns</b><br><b>Up:</b> CHARLES<br><b>Lo:</b> DAVID<br><b>Cr:</b> SUSAN<br><b>Sf:</b>                                       |                 |
| Discounts:  |                 |

|   |                       |  |
|---|-----------------------|--|
| CLOSE<br>LAST COMMENT ON: 5/4/2011<br>CHANGE ORDER OF COMMENTS<br>PUBLIC COMMENT<br>PRIVATE COMMENT<br>DELETE COMMENTS BELOW<br><b>#1</b> |                       | Price<br>\$29.99<br>\$10.00<br>\$24.99 |
| 1. Low Oil O/A  |                       |  |
| 2. Dmgd CrnCase Pan   |                       |  |
| 3. Eng Oil Leaks O/A  |                       |  |
| 4. Trnsmn Leaks O/A   |                       |  |
| 5. Transax Leaks O/A  |                       |  |
| 6. TrnCase Leaks O/A  |                       |  |
| 7. Frnt Diff Lks O/A  |                       |  |
| 8. Rear Diff Lks O/A  |                       |  |
| 9. Wrong Oil Flt O/A  |                       |  |
| <b>#2</b>   | 10. Brk Fluid Low O/A |  |
|   | 11. Transmn Low O/A   |  |
|   | 12. Cool Sys Leak O/A |  |
|   | 13. Str Drain Pan Plg |  |
|   | 14. Str Trnsm CE Pl   |  |
|   | 15. Str Tranmsn Drain |  |
|   | 16. Str Trnfr Cs CE   |  |
|   | 17. Str Trnfr Cs DrPl |  |
|   | 18. Str F Diff CE Pl  |  |
|   | 19. Str R Diff CE Pl  |  |
| <b>MORE</b>   |                       | \$0.00                                 |

Note: All comments, except for *PRIVATE COMMENTS*, are printed on the customers receipt.

## Printing The Receipt

1. If you are ready to print the receipt, select *Total* to continue to the last menu.
2. Select *Payment* and then select a payment type. If *Cash* is selected, enter the amount tendered. Press <Enter>.
  - If you need to make any changes select *Go Back*.
  - If you need to cancel the receipt select *Payment* and then *Cancel*, then click *Final OK* and enter PIN to confirm cancellation.
3. If payment type is correct and you are ready to print the receipt, select *Final OK* and press <Enter>.

Note: All cancelled customers appear on the daily sales reports.

You will get two copies of the receipt; One for you and one for the customer. If there is a printing or user error and you need to re-print the receipt, see the *Reprint Receipt* section of this manual for instructions.



# Quick Customers

The Quick customer is a customer who makes a simple purchase, such as a wiper blade or a bottle of oil. As a general rule, Quick customers do not purchase any services and do not need their name or vehicle information stored in your customer history database. To learn how to cash out a customer who is purchasing services (a Regular customer), see previous section.

Cashing out a Quick customer is a two-step process:

- 1. Create the customer's receipt by entering the items the customer purchased
- 2. Select the type of payment, and print the customer's receipt.

## Creating The Receipt

From the Point-of-Sale menu, select *Customer*, then select *Quick Customer*.

The screenshot shows the POS system interface. At the top, there are tabs: Customer, Pay Outs, Stats, Clock, Void, Reprint, and Main Menu. The 'Customer' tab is active, and a dropdown menu is open, showing options: CLOSE, FULL CUSTOMER, FLEET CUSTOMER, QUICK CUSTOMER (highlighted), REVIEW CUSTOMER, and FIND BY LAST NAME. Below the menu, there is a list of numbers 1 through 15. To the right, there are fields for Acct #, VIN, Car ID, Mileage, Last Oil, and Last Oil Qty. Below these fields is a table with columns: Product, Quantity, Type, Part, and Price. At the bottom, there are fields for Discounts, Coupons, Change, and Total.

Select *Services*, and select the items the customer purchased. Click *Close* when done.

The screenshot shows the POS system interface. At the top, there are tabs: Services, Fleet, Name, History, Car ID, Fluids, Techs, and Continue. The 'Services' tab is active, and a dropdown menu is open, showing a list of services: CLOSE, Extra Oil, 1 STD SERV, 2 PREM SYNTH, 3 LOF, 4 OF ONLY, DIESEL FILT, HM FULL SER, SUV FULL SER, AIR FILTER, AUTO DRN FIL, AUTO TRANS, BREATHER, PCV VALVE, WIPERS (highlighted), FUEL FILTER, FRESH START, COOL EXCHANG, COOLANT FILL, FDIFF SYNTH, FRONT DIFF, FINAL DRIVE, RDIFF SYNTH, REAR DIFF, MANUAL SYNTH, and MORE. Below the menu, there are fields for Acct #, VIN, Car ID, Mileage, Last Oil, and Last Oil Qty. Below these fields is a table with columns: Product, Quantity, Type, Part, and Price. At the bottom, there are fields for Discounts, Coupons, Change, and Total. The 'Total' field shows \$0.00.



# Printing The Receipt

Select *Continue* from the right corner of the screen.

The screenshot shows the top of the POS interface. At the top, there are tabs: Services, Fleet, Name, History, Car ID, Fluids, Techs, and a red 'Continue' button with a close icon. Below the tabs, customer information is displayed: Name: QUICK CHECK, Acct #: QUIK CHEK, VIN: (blank), Street: (blank), Car ID: (blank), Phone: (blank), Mileage: 1, Last Oil: (blank), Email: (blank), Last Oil Qty: 0. A table below shows a list of items: #1 Customer, 16-30 Product, Quantity, Type, Part, Price. The first item is '1. QUICK CHECK' with a price of \$11.99. A 'Touch OFF' button is visible in the top right corner.

Enter any coupons or discounts that the customer may have received, then select *Total*.

The screenshot shows the 'Discount' menu open. The menu options are: CLOSE, AACD, AC15, AES10, AHS, BCTLH, BHBB, CAD, CAPE, CC10, CC15, CCB15, DISC10, DISC15, EE10, EMPLOYEE, ES10, FCT10, FFWS, FHF, FLEET, FLEET 10%, FLEET 15%, FLEET 20%, FLEET 24%, and MORE. The 'Total' button is visible at the bottom right of the screen. The background shows the same customer information and item list as the previous screenshot.

Select *Payment* and choose the type of payment that the customer tendered.

The screenshot shows the 'Payment' menu open. The menu options are: CLOSE, CASH, CHECK, MASTER CARD, VISA, AMEX, DISCOVER, TELECHECK, VOYAGER, WRIGHT EXPRES, FUEL MAN, DEBIT CARD, OTHER CARD, TRAVELER CK, GIFT CERTIF, GIFT CARD, FLEET, SPLIT, CANCEL, TOP OFF, ESTIMATE, and RAIN CHECK. The 'Total' button is visible at the bottom right of the screen. The background shows the same customer information and item list as the previous screenshots.

Verify that all of the information on the receipt is correct. If the receipt is correct, select *Final OK* to print the customer's receipt. If any changes need to be made to the customer's receipt, select *Go Back*, and make your corrections. Repeat Step 2 to cash out your customer.

# Voids

During the course of the day it is sometimes necessary to delete a sales transaction from your daily sales. This process is called a void.

## Performing a Void

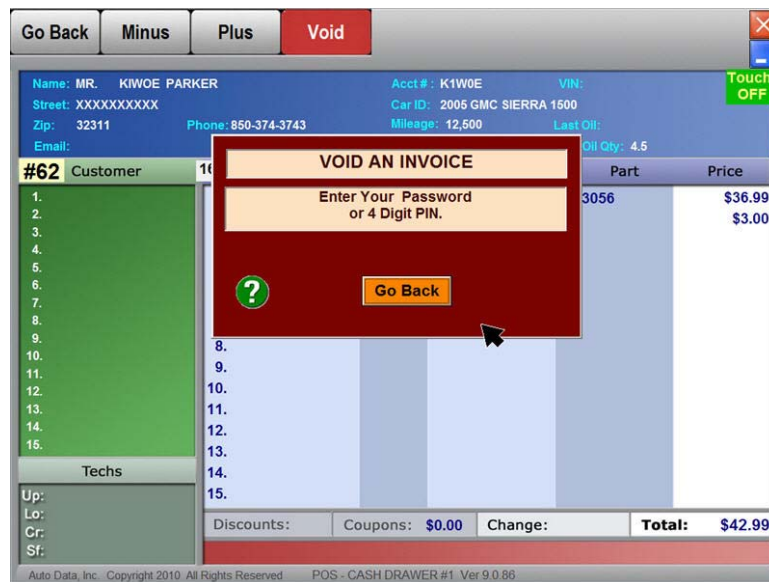
From the main Point-of-Sale menu, click *Void*.

| #1  | Customer | 16 - 30 | Product | Quantity | Type | Part | Price |
|-----|----------|---------|---------|----------|------|------|-------|
| 1.  |          |         |         |          |      |      |       |
| 2.  |          |         |         |          |      |      |       |
| 3.  |          |         |         |          |      |      |       |
| 4.  |          |         |         |          |      |      |       |
| 5.  |          |         |         |          |      |      |       |
| 6.  |          |         |         |          |      |      |       |
| 7.  |          |         |         |          |      |      |       |
| 8.  |          |         |         |          |      |      |       |
| 9.  |          |         |         |          |      |      |       |
| 10. |          |         |         |          |      |      |       |
| 11. |          |         |         |          |      |      |       |
| 12. |          |         |         |          |      |      |       |
| 13. |          |         |         |          |      |      |       |
| 14. |          |         |         |          |      |      |       |
| 15. |          |         |         |          |      |      |       |

You will be able to scroll through all tickets cashed out today using the *Plus* button to scroll forward, and the *Minus* button to scroll backwards.

| #62 | Customer | 16 - 30 | Product         | Quantity | Type        | Part   | Price   |
|-----|----------|---------|-----------------|----------|-------------|--------|---------|
| 1.  |          |         | 1. 1 STD SERV   | 4.50     | MOBIL1 5W20 | CF3056 | \$36.99 |
| 2.  |          |         | 2. Oil Filter + | 1.00     |             |        | \$3.00  |
| 3.  |          |         |                 |          |             |        |         |
| 4.  |          |         |                 |          |             |        |         |
| 5.  |          |         |                 |          |             |        |         |
| 6.  |          |         |                 |          |             |        |         |
| 7.  |          |         |                 |          |             |        |         |
| 8.  |          |         |                 |          |             |        |         |
| 9.  |          |         |                 |          |             |        |         |
| 10. |          |         |                 |          |             |        |         |
| 11. |          |         |                 |          |             |        |         |
| 12. |          |         |                 |          |             |        |         |
| 13. |          |         |                 |          |             |        |         |
| 14. |          |         |                 |          |             |        |         |
| 15. |          |         |                 |          |             |        |         |

Once you have found the ticket you want to void, click *Void*. You will be required to enter your password or 4 digit pin. If you have sufficient authorization to perform a void, the void will be successful and you will be returned to the main Point-of-Sale menu.



Attach the void receipt to your original receipt for your nightly paperwork.

**Note:** Voids are **ONLY** for tickets that were cashed-out on the current day. You may not void a ticket from a previous day.

## In-Use Customers

During a normal business day you will occasionally see the words In Use in your customer list. Events that can cause the creation of In-Use customers include power failures, electrical surges, or improper shutdown. You will notice that it is impossible to edit the In-Use customers. Therefore, you will need to Un-Lock these customers using the following steps.

### Un-lock In-Use Customers

1. From the *Home* tab on the main menu select *Miscellaneous*
2. Select *Store Setup*, followed by *Software Setup*.
3. Select *Un-lock In-Use Customers*.



When you click *Un-lock In-Use customers*, you will receive two messages:

Message 1: *“All other computers MUST be at the MAIN MENU to use this feature. Check before you continue.”*

Make sure all bay computers are at the main menu or on the Windows screen and then click *OK*.

Message 2: *“Clear IN USE Customers in the POINT-OF-SALE screen. You will NOT lose any customer information. Do you wish to continue? YES or NO”*

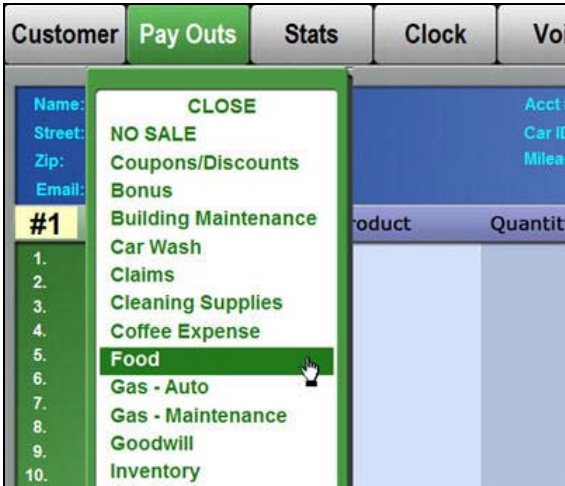
Click *Yes* when prompted, and your In-Use customers will be cleared. If you click *No*, the customers will remain locked and you will not be able to cash them out.

# Pay-Outs

The *Pay Outs* menu allows you to track miscellaneous shop expenses that are deducted from the register each day.

## Performing a Pay Out

Select *Pay Outs* from the main Point-of-Sale menu and you will see the different categories to which a pay out can be assigned.



Select the appropriate category, enter your PIN and then enter the amount of your pay out.



Press <Enter> and then click *Final OK*. You will now get a receipt of the pay out for your records.

# Stats Menu

At any time during the day you can get a quick look at your sales information and your labor costs per car by using the *Stats* menu.

## Viewing Stats

From your main Point-of-Sale menu, select *Stats* and you will see a breakdown of services performed and the labor costs per vehicle for the current day.

Customer

Pay Outs

Stats

Clock

Void

F

Name:

Street:

Zip:

Email:

#2

Customer

1.

2.

3.

4.

5.

6.

7.

8.

9.

10.

11.

12.

13.

14.

15.

Techs

Up:

CLOSE

FULL SERVICE---

AIR FILTERS ---

BREATHERS ----

AUTO. TRANS ---

GEAR BOX -----

WIPER BLADES --

PCV VALVE -----

TUNE UP -----

CAR WASH -----

TOTAL VEHICLES-

2

1

0

0

0

1

0

0

0

2

Average Ticket :

Cash On Hand :

LUBE Labor:

TUNE-UP Labor:

WASH Labor:

Hours/Car :

\$78.98

\$125.00

\$0.00

\$0.00

\$0.00

0.00

Note: Please note that the services listed in this menu **cannot be changed**.

# Closing Procedures

When you are ready to close your shop for the day, you must go through *Closing Procedures* on the *Cash* tab. There are two required steps in order to successfully close your day. These are:

1. Entering your deposits and
2. Printing your Z-Report

If you would like to learn how to use the other tools available as part of closing procedures, scroll down. Remember however, that these must be used *before* entering your deposits and printing your Z-Report.

Once you have entered your deposit information you can no longer cash out customers and once you have printed your Z-Report, you can no longer access additional tools in the *Closing Procedures* section.

## Entering Deposits

1. From the *Cash* tab on the main menu, select *Closing Procedures* and enter your PIN
2. Select *Enter Deposits* and click *Yes* if you are sure you want to continue. Remember, you will no longer be able to cash out customers today.
3. Select the Deposit type on the left side of the screen and enter the amount to deposit.
4. Repeat step 3 for all deposit types with sales.
5. Once you are done entering all deposits, click on *Save Deposit*.
6. Select *Go Back* and proceed to *Print Z-report*.



The screenshot shows the 'Closing Procedures - Enter Deposits' screen. At the top, there's a header with the AT&T logo and a 'Cash' tab. Below the header, there's a 'Go Back' button. The main area contains a table for entering deposits.

| DEPOSIT                                  | SALES             | AMOUNT            | +/-              |
|--|-------------------|-------------------|------------------|
| <input type="checkbox"/> CASH            | \$192.56          | \$192.56          | \$0.00           |
| <input type="checkbox"/> CHECK           | \$0.00            | \$0.00            | \$0.00           |
| <input type="checkbox"/> MASTER CARD     | \$0.00            | \$0.00            | \$0.00           |
| <input type="checkbox"/> VISA            | \$929.14          | \$929.14          | \$0.00           |
| <input checked="" type="checkbox"/> AMEX | \$83.88           | \$83.88           | -\$83.88         |
| <input type="checkbox"/> DISCOVER        | \$0.00            | \$0.00            | \$0.00           |
| <input type="checkbox"/> TELECHECK       | \$0.00            | \$0.00            | \$0.00           |
| <input type="checkbox"/> VOYAGER         | \$0.00            | \$0.00            | \$0.00           |
| <input type="checkbox"/> WRIGHT EXPRES   | \$0.00            | \$0.00            | \$0.00           |
| <input type="checkbox"/> FUEL MAN        | \$0.00            | \$0.00            | \$0.00           |
| <input type="checkbox"/> DEBIT CARD      | \$0.00            | \$0.00            | \$0.00           |
| <input type="checkbox"/> OTHER CARD      | \$44.52           | \$0.00            | -\$44.52         |
| <b>Save Deposit</b>                      | <b>\$1,250.10</b> | <b>\$1,121.70</b> | <b>-\$128.40</b> |



# Z-Report

The final step to closing your daily sales is printing a Z-Report. The Z- Report generates a complete listing of your daily sales activity, including a Cash Drawer report, a Daily Sales report, an Inventory Alert report, and an Employee Incentive report.

## Printing The Z-Report

1. From the *Cash* tab on the main menu, select *Closing Procedures*.
2. Make sure you've entered deposits, and then click on *Print Z-Report*.
3. Each report will show individually and you can choose to print it or not.
4. Clicking the *Go Back* button will take you to the next report until you've gone through them all.

Once you have finished viewing your closing reports, your system will automatically connect to Auto Data's server and download any available updates (Dialup customers will connect weekly, not daily). After downloading updates a backup will automatically begin. If your USB pen drive is not plugged in, your backup will fail. Proceed to plug in your USB pen drive and go to the *Cash* tab and click on *Backup* to manually run your daily backup again.

After your backup is complete, you are closed for the day.

## Additional Tools

There are additional tools available in the closing procedures section of the program. These are optional.

- *Cash Calculator* - Tool that helps you count your cash and change.
- *Cash Drawer Worksheet* - A breakdown of today's sales by payment type.
- *Hourly Report* - Hourly breakdown of services sold during the day.
- *Edit Time Clock* - Allows you to change the clock-in or clock-out times for an employee.
- *Credit Card* options are only used if Auto Data provides your credit card processing.



## Cash Calculator

Pos-i-Lube includes a cash calculator to assist you with your closing procedures. This feature allows you to count your cash according to each denomination (nickels, dimes, ones, fives, etc.) Once you have completed counting your cash you may print this report to include with your nightly paperwork.

### Using the Cash Calculator

1. From the *Cash* tab on the main menu, select *Closing Procedures* and enter your PIN.
2. Click on *Cash Calculator*.
3. Select a denomination type by clicking on the radio button to the right, enter the amount on hand and press <Enter>.
4. Once you're done, write down the total or press *Print* to print the report.
5. Click *Go Back* to return to the *Closing Procedures* menu.

The screenshot displays the 'Cash Calculator' interface within the 'Closing Procedures' menu. At the top, there's a 'Cash' tab and a 'Go Back' button. The main area contains a table with columns for 'COUNT', 'DENOMINATION', and 'AMOUNT'. Each row has a radio button to its left. The table lists denominations from 1-Penny to 100-Hundred. Below the table, the 'TOTAL' is calculated as '\$576.88'. At the bottom, there are two buttons: 'Open Cash Drawer' and 'PRINT'.

|                       | COUNT | DENOMINATION    | AMOUNT   |
|-----------------------|-------|-----------------|----------|
| <input type="radio"/> | 23    | 1 - PENNY       | \$0.23   |
| <input type="radio"/> | 7     | 5 - NICKEL      | \$0.35   |
| <input type="radio"/> | 18    | 10 - DIME       | \$1.80   |
| <input type="radio"/> | 22    | 25 - QUARTER    | \$5.50   |
| <input type="radio"/> | 9     | \$1 - DOLLAR    | \$9.00   |
| <input type="radio"/> | 8     | \$5 - FIVE      | \$40.00  |
| <input type="radio"/> | 12    | \$10 - TEN      | \$120.00 |
| <input type="radio"/> | 15    | \$20 - TWENTY   | \$300.00 |
| <input type="radio"/> | 0     | \$50 - FIFTY    | \$0.00   |
| <input type="radio"/> | 1     | \$100 - HUNDRED | \$100.00 |
| TOTAL                 |       |                 | \$576.88 |

Open Cash Drawer      PRINT

Note: If you do not have the key for the cash drawer, you can open the cash drawer from this page. You will, however, need to use a PIN that has this permission enabled.

## Editing The Time Clock

Before a Z- Report is printed each evening and after everyone has clocked out, it is possible for a manager or supervisor to edit employee hours for that day.

### Editing Employee Hours

1. From the *Cash* tab on the main menu, select *Closing Procedures* and enter your PIN.
2. Select *Edit Time Clock*.
3. Select the employee whose time you wish to edit.
4. Select *Time In* or *Time Out* and change the time, then press <Enter>.
5. Repeat this process for other employees, if necessary.

**Edit Time Clock**

JOHN

**Employees**

JOHN  
RICHARD

☐ Time In: 7 : 00 AM  
☐ Time Out: 12 : 00 PM

☒ Time In: 12 : 30  
☐ Time Out: 6 : 00 PM

☐ Time In: :  
☐ Time Out: :

Go Back

# Daily Backup

## Do Your Back-Up Every night!

It is very important for you to run your backup EVERY night. This procedure provides a "hard copy" of your data. If you do not do this daily, you are leaving your data unprotected against any type of system failure. If there is a system failure, and you do not have a current backup, there is almost nothing that Auto Data can do to help you restore your lost customer and sales information. Remember: It takes just a few minutes to perform this procedure.

## How to run a Daily Backup

After you've done your closing procedures, your backup should run automatically. If for any reason, your pen drive was not plugged in, or your disk was not in the drive and your backup failed, you can simply exit out to the *Cash* tab and click on *Backup* and the system will attempt to run a backup again.

You can also go to the *Home* tab, click on *Backup* and you will have additional options.



### Daily Backup

The daily backup includes all of your sales, customer history and inventory information. A daily backup will be all you need to run in most cases.

### Customer Only Backup

Customer only backup will only get a copy of your customer databases.

### Monthly Backup

A monthly backup will backup everything a daily backup does and in addition will backup program files needed to make Pos-I-lube run. It is helpful to have a monthly backup in case your system goes down and you are not able to connect with Auto Data technicians.

# CHAPTER 5: Fleets

## Setting up a Fleet

With this feature you can track your fleet sales and generate reports that contain a sales history of each fleet.

Navigate to *Fleet Management*: (Home tab, Miscellaneous, Store Setup, Software Setup, Fleet Data Management and enter PIN)

**Fleet Management**

1001 USES UTILITY BUILDING  
AFFORDABLE PAINTING  
A AND A GLASS  
A D BAYNARD PLUMBING  
A MATERIALS GROUP INC  
A ROCK SOLID TERMITE PEST CON  
A TOUCH OF CLASS  
A.D. PLATT & ASSOCIATES INC

ADD GO BACK  
DELETE PRINT  
Check List

Account Number: 7521 FLEET COMPANY NAME: 1001 USES UTILITY BUILDING Zip: 25418  
Address: 123 UTILITY RD Salesman: JACK G

☐ Cash Only  
☒ Tax Exempt

**Contacts**  
Primary Contact Name: TIM JONES  
Secondary Contact Name:  
Title: Title:  
Phone: Ext: Phone: Ext:

**Authorizations**  
☐ NONE  
☐ Call for PO Number prior to ANY service.  
☒ Additional Services require prior approval from Authorized Person.  
☐ Driver may only authorize items listed on coupon.  
☐ Call for PO if over: \$50.00

**Information Required on Receipt**  
☒ Driver Name  
☐ Name of Fleet Customer  
☐ PO Number  
☐ Authorization Number  
☐ Card Number  
☒ VIN  
☐ License Plate  
☐ Fleet Number  
☒ Unit Number

**Pricing/Discounts**  
Credit Limit (per visit): \$0.00  
Full Service Price: \$0.00  
Synthetic Full Serv. Price: \$0.00  
Dollar (\$) Discount: \$0.00  
Percentage (%) Discount: 15%

## To Add a New Fleet Account

To add a new fleet, click the *Add* button. Enter each field of information for the new fleet. Once you're done entering all the data your fleet will be saved. You also have optional additional fields you can configure for each fleet. These are described briefly below:

**Authorizations** - When a fleet requires authorization before services are performed, you can specify what type of authorization is needed by selecting one option in this box.

**Information Required on Receipt** - The technician will not be able to cash out this fleet until all the items marked here as "required" are entered in the Point-of-Sale. These items will also print out on the invoices for future reference.

**Pricing/Discounts** - You can set these parameters for each individual fleet. When the fleet buys a service, the previously configured dollar discount will be automatically applied.

**Cash Only** - If this is checked, the software will not allow you to charge the ticket to this fleet. They MUST be cashed out as CASH or some other form of payment must be received.

**Tax Exempt** - This may apply to government vehicles or any vehicle that would be exempt from paying taxes. If this is checked, tax will not be applied to the ticket when this fleet is cashed out.

# Checklist

Using the checklist feature, you can type in items that need to be done when a particular fleet comes in. There is a master checklist that will be accessed when you click on the Check List button. From this screen you can both add items to the master list, or add items to the selected fleet by clicking on Copy Item to Fleet Below. You can also move the order the items are listed under the fleet name, by using the Move Up, Move Down, or Delete buttons.

### Fleet Check List

Add Item to Check List

Build your Fleet Check List here. Then copy each item as needed to the Fleet Name

STANDARD SERVICE  
THE PO FOR THIS ACCT IS 1476425  
ONLY BILL TRENT AND TRAVIS SULLIVAN CAN CHARGE  
2005 DODGE 2500 OR 2001 FORD F250  
IF VIN DOES NOT SCAN PLEASE TYPE IT IN  
DO NOT LET DRIVER CHARGE WITH OUT A PO  
IF NO COUPON CALL FOR PO  
DO NOT LAURIE WITH 2000 MERCURY MOUNTAINEER CHARGE ON ACCOUNT  
ONLY VEHICLES MARKED W/LAKE JACKSON FIRE RESCUE CAN CHARGE

GO BACK

Copy Item to Fleet Below

Check List for this Fleet Name only

Fleet Name: 1001 USES UTILITY BUILDING

MOVE UP

MOVE DOWN

DELETE

1) 10 % FLEET DISCOUNT  
2) STANDARD SERVICE  
3) IF NO COUPON CALL FOR PO  
4)  
5)  
6)  
7)  
8)  
9)

# Modifying Accounts

If you've entered some data wrong on a fleet or need to change it for any reason you can select the radio button next to the line you want to change and then edit the field individually.

If you'd like to delete an account, simply select the fleet by highlighting the fleet name and click Delete. Click Yes to confirm delete.

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# Cashing-Out a Fleet Customer

The process for cashing-out a fleet customer is basically the same as cashing out a Regular customer with two exceptions: Entering the fleet name and selecting the Fleet payment type.

## Select the Fleet Account

1. Click Customer and then select Fleet Customer.

The screenshot shows the POS system interface. At the top, there are tabs: Customer, Pay Outs, Stats, Clock, Void, Reprint, and Main Menu. The 'Customer' tab is active, and a dropdown menu is open, showing options: CLOSE, FULL CUSTOMER, FLEET CUSTOMER (highlighted), QUICK CUSTOMER, REVIEW CUSTOMER, and FIND BY LAST NAME. Below the menu, there is a list of numbers 1 through 15. To the right, there are fields for Acct #, VIN, Car ID, Mileage, Last Oil, and Last Oil Qty. Below these fields is a table with columns: Product, Quantity, Type, Part, and Price. At the bottom, there are fields for Discounts, Coupons, Change, and Total.

2. Enter the VIN number, or license plate.
3. Type in the first few letters of the fleet's name and press <Enter> to pull up the fleet list.
4. Click on the appropriate fleet name to select it.

The screenshot shows the POS system interface. At the top, there are tabs: Customer, Pay Outs, Stats, Clock, Void, Reprint, and Main Menu. The 'Customer' tab is active, and a dropdown menu is open, showing a list of fleet names: GO BACK, A AFFORDABLE PAINTING, A AND A GLASS, A D BAYNARD PLUMBING, A MATERIALS GROUP INC, A ROCK SOLID TERMITE PEST CON, A TOUCH OF CLASS, A.D. PLATT ASSOCIATES INC, A1 DEVELOPMENT INC, AAA AUTO CLUB SOUTH, AAA TREE EXPERTS (highlighted), AARONS, ABATE PEST CONTROL, ABBOTT MOBILE REPAIR, ABC FLOORING CENTER, ABSOLUTE COMPUTING SOLUTIONS, ABSOLUTE DEMO INC, AC HEAT NOW INC, ACCELERATED GENETICS, ACCENT OFFICE INTERIORS, ACCESS INFUSION PARTNERS, ACCESSIBLE TRANSPORT INC, ACE ELECTRICAL CONTRACTORS, ACE HARDWARE, and MORE. To the right, there are fields for Acct # (ABC124), VIN, Car ID, Mileage (0), Last Oil, and Last Oil Qty (0). Below these fields is a table with columns: Quantity, Type, Part, and Price. At the bottom, there are fields for Coupons (\$0.00), Change, and Total (\$0.00).



Note: If this does not pull up a list of your fleets, verify that fleet lookup is set to "ON" in store setup and verify that you have set up your fleet accounts.

Continue to input data for the transaction as you would any regular customer.

## Fleet Options

When you have a fleet customer in your Point-of-Sale, your *Fleet* button becomes active. You can click on the *Fleet* button anytime during the transaction to review options that were specifically configured for this fleet. Some items will require you to enter data or confirm the service has been done. To enter data in the *Required Fleet Information* box, click on the checkbox next to the line you want to edit.

The screenshot shows the 'Fleet' window for 'AAA TREE EXPERTS'. The window has tabs for Services, Fleet (selected), Name, History, Car ID, Fluids, Techs, and Continue. The 'Fleet' tab displays customer information, a 'No Authorization Required' message, 'Required Fleet Information' (with checkboxes for Driver Name, License Plate, and PO Number), 'Fleet Pricing' (Credit Limit, Full Service, Full Serv Synthetic, Dollar Discount, Percent Discount), 'Fleet Contacts' (Primary/Secondary, Name, Title, Phone), and a 'Fleet Check List' (10% FLEET DISCOUNT, USE THE TAG NUM, DO NOT LET DRIVER CHARGE WITH OUT A PO).

## Select the Fleet Payment Type

At the *Payment* menu, select *Fleet*.

The screenshot shows the 'Payment' menu in the POS system. The menu is open, showing a list of payment options: CASH, CHECK, MASTER CARD, VISA, AMEX, DISCOVER, TELECHECK, VOYAGER, WRIGHT EXPRES, FUEL MAN, DEBIT CARD, OTHER CARD, TRAVELER CK, GIFT CERTIF, GIFT CARD, FLEET (highlighted), SPLIT, CANCEL, TOP OFF, ESTIMATE, and RAIN CHECK. The 'FLEET' option is selected. The background shows the 'Payment' window with a table of items and a total of \$36.75.

Your fleet options box will pop-up on the screen so you can make sure everything was completed to specifications. If any required information is not filled in, you will not be able to cash out this fleet until it is. Click *Go Back* when you are ready to continue.

The screenshot shows a software interface for fleet management. At the top, there are buttons for 'Go Back', 'Payment', and a close button. Below these, customer information is displayed: Name: AAA TREE EXPERTS, Acct #: U15A, VIN: 2002 DODGE RAM 1500 PICKUP, Street: 3610-1 NORTH MONROE STREET, Car ID: 32303, Zip: 32303, Email: . A 'Touch OFF' button is also visible. On the left, a list of customers is shown, with '#2 Customer' selected. The main area displays 'AAA TREE EXPERTS' with 'OK' and 'Cancel' buttons. Below this, a yellow box states 'No Authorization Required.' The 'Required Fleet Information' section includes fields for Driver Name (ALEX WELDON), License Plate (XYR680), and PO Number (12-PO98). The 'Fleet Pricing' section lists various services and their costs: Credit Limit (\$0.00), Full Service (\$0.00), Full Serv Synthetic (\$0.00), Dollar Discount (\$0.00), and Percent Discount (10%). The 'Fleet Contacts' section shows 'Primary' contact information: Name: AARON, Title: OWNER, Phone: 398-493-1200 Ext: . A 'Fleet Check List' section includes checkboxes for '10 % FLEET DISCOUNT', 'USE THE TAG NUM', and 'DO NOT LET DRIVER CHARGE WITH OUT A PO'. At the bottom, there are buttons for 'Up:', 'Lo:', 'Cr:', and 'St:'. The footer reads 'Auto Data, Inc. Copyright 2010'.

Click *Final OK* to cash out the fleet.

As long as you selected the fleet account from the fleet list at the beginning, the fleet's account number and any required information will appear on the receipt. You will get three copies of your fleet invoice: one for you, one for the driver and one to bill with.

## Fleet Sales Report

If you have setup your fleet accounts you can generate a sales report which gives a breakdown of the vehicles, receipt numbers, and total charges for each of your fleet accounts.

From the *Cash* tab on the main menu, select *Sales Reports*, *Past Sales Reports*, enter PIN and then *Fleet Sales*.

Select the dates you wish to be on your report and click *OK*.

The screenshot shows a 'Fleet Sales Report' interface. At the top, there are navigation arrows and the text 'May' and '2011'. Below this is a calendar grid with days of the week (Su, Mo, Tu, We, Th, Fr, Sa) and dates (1 through 31). The dates 8 through 14 are highlighted in yellow. To the right of the calendar are buttons for 'Select Month' and 'Clear Month'. At the bottom are buttons for 'OK' and 'Cancel'.

Select the fleet names you want on your report and click **OK**.

The screenshot displays a software interface for selecting fleet names. A central dialog box titled "FLEET NAME" is open, showing a list of companies. The company "AAA TREE EXPERTS" is highlighted in blue. Below the list are three buttons: "OK", "Select ALL", and "CANCEL". In the background, a calendar grid is visible with dates 1 through 30. The date 8 is highlighted in yellow. To the right of the calendar are two buttons: "Select Month" and "Clear Month".

Note: If you select a large range of dates, or all Fleets are selected, this report might take a few minutes to generate.

To view a sample fleet report, please go to the Reports section of this manual.

# CHAPTER 6: Communications

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## Remote Maintenance

If you ever need help or need changes made to your program, such as editing your comments list, you will need to call us first and we will ask you to go to Remote Maintenance. At this point you will need to click on your Communications tab, Remote Maintenance, and then click Yes to continue.



When you click Yes, your computer initiates a connection and then allows us to log in. Once we are connected, we will be able to make changes to your files or fix any problems.

## Keep in Mind

- We are only able to log into your computer when you initiate the connection, meaning when you click on Remote Maintenance.
- If you ever need to connect with us, you need to call and let us know you will be initiating a connection, otherwise, no one will be expecting your connection.
- You must have a phone line and a working dial-up modem available in case you need to connect with us. In cases where a DSL connection is available, we will attempt to connect with that first. If for any reason your DSL is unavailable, you will still always need to have a working dial-up modem and a phone line.

# AutoPoll.Net

AutoPoll.Net is a service which enables you to upload your sales data to our server, where you may access it from another location, such as your back office. AutoPoll.Net is a subscription service and you will need to call the Auto Data sales department at 1-800-767-7580 to sign up.

This feature is most useful for companies that own several locations and therefore use our Enterprise Control back office software. However, smaller companies will also benefit by being able to access sales data throughout the day on the Internet and being able to download sales data to be used together with QuickBooks programs.

## How AutoPoll.Net works

AutoPoll will connect to the Internet during closing procedures. After you run your Z-Report, AutoPoll will connect and send your sales and inventory data to our server. From there, your back office will have access to that information. Autopoll will also download any updates you have available and any price changes from your back office.

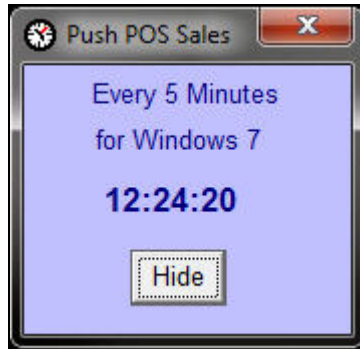
If AutoPoll does not connect during closing procedures, go to the Communications tab and click on AutoPoll.Net to try again. Visit our FAQ section for troubleshooting tips. If AutoPoll consistently fails after trying these tips, contact Auto Data tech support.

If you would like current sales data available online throughout the day, learn more about activating the Push Sales feature of the Autopoll service.

# Push Sales

Push Sales is an optional service available when you sign up for AutoPoll.Net. This program will be launched when you first start up your computer and will have a box that looks like the image below. This box must stay open during the day in order for Push Sales to function properly.

Note: To minimize this box, click the *Hide* button, not the X on the top right, because this will terminate the program.



## How Push Sales works

If you are currently using dial-up as your method of connection, then your sales data will be "pushed" to our server at 10am, 2pm and 4pm. Depending on the speed of connection, this process should last between 3-5 minutes. If you are using DSL or high speed internet, then your sales data will be sent up every 5 minutes and should only take a few seconds. If for some reason, your push sales program is not open, you can re-open it by:

1. Going to the Home tab
2. Clicking on Windows options and Exit to Windows
3. Clicking on Start and All Programs
4. Clicking on Startup
5. Clicking on Push Sales

# Auto Update

Auto Update allows you to stay current with all new software version releases. These releases may include new features, requested changes and bug fixes. If you do not use the Autopoll.Net service, you will not receive an auto update unless you manually initiate one. We recommend running an Auto Update weekly after closing procedures to download any available files. If you use dial-up, this process may take up to 20-25 minutes if you haven't updated in a long time or if we are releasing new software. If you are using DSL, this process should take less than 5 minutes.

## How to run an Auto Update

1. From the main menu select the *Communications* tab.
2. Click on *Auto Update*.



At this point, your computer will start a connection and download any available files. If your update is not successful, visit our FAQ section. If you are still not able to auto update, call Auto Data technical support.



# E-Mail

The E-Mail feature in the Pos-i-Lube program is for internal use only. You will be able to write e-mails to Auto Data, to your back office location or to other stores within your company. If you need help adding stores to your e-mail list, contact Auto Data. To access E-mail functions, go to *Communications* and then click *E-mail*.

## How to use E-Mail functions



### To write an E-Mail:

1. Select Recipient (*Auto Data*, *Other Stores*, or *OFFICE*)
2. Enter the person's name who you will like to receive the e-mail in the *To* field.
3. Enter your name in the *From* field.
4. Type the content of the message
5. Click *Send* once you are finished

Your E-Mail will be sent once you connect to AutoPoll.Net, either by clicking on AutoPoll.Net on the Communications tab or automatically after you close for the day. If you are not signed up to use AutoPoll.Net, your e-mail will be sent when you run your next Auto Update.

To read, print or delete your E-Mails, click on the appropriate item on the main *E-Mail* page.

## To export E- Mail addresses

You can now export a list of your customer's email addresses into a data file on your computer. You are going to build a file named EMAIL.csv. You can either create a new list or add to an existing list.

If you would like to create a new list, click "ERASE List" and make sure "Customers in List" equals "0". Once you are ready to build your list, follow the steps below:

1. Select a starting date
2. Select an ending date
3. Click *EXPORT to List*
4. Find your EMAIL.csv in your \POS folder.

This file is compatible with *Constant Contact* and can be used for other email marketing.

## Export Email Addresses

Go Back

|    |     |    |        |    |    |    |
|----|-----|----|--------|----|----|----|
| ←  | May | →  | ← 2011 | →  |    |    |
| Su | Mo  | Tu | We     | Th | Fr | Sa |
| 1  | 2   | 3  | 4      | 5  | 6  | 7  |
| 8  | 9   | 10 | 11     | 12 | 13 | 14 |
| 15 | 16  | 17 | 18     | 19 | 20 | 21 |
| 22 | 23  | 24 | 25     | 26 | 27 | 28 |
| 29 | 30  | 31 |        |    |    |    |

EXPORT to List

|    |     |    |        |    |    |    |
|----|-----|----|--------|----|----|----|
| ←  | May | →  | ← 2011 | →  |    |    |
| Su | Mo  | Tu | We     | Th | Fr | Sa |
| 1  | 2   | 3  | 4      | 5  | 6  | 7  |
| 8  | 9   | 10 | 11     | 12 | 13 | 14 |
| 15 | 16  | 17 | 18     | 19 | 20 | 21 |
| 22 | 23  | 24 | 25     | 26 | 27 | 28 |
| 29 | 30  | 31 |        |    |    |    |

ERASE List

Customers in List: 462

Constant Contact Compatible

Log on to "www.constantcontact.com" and set up your own account to send emails to everyone in the list that you just exported.  
The List is named EMAIL.CSV and is in the folder \POS

# CHAPTER 7: Reminder Cards

## Getting Started

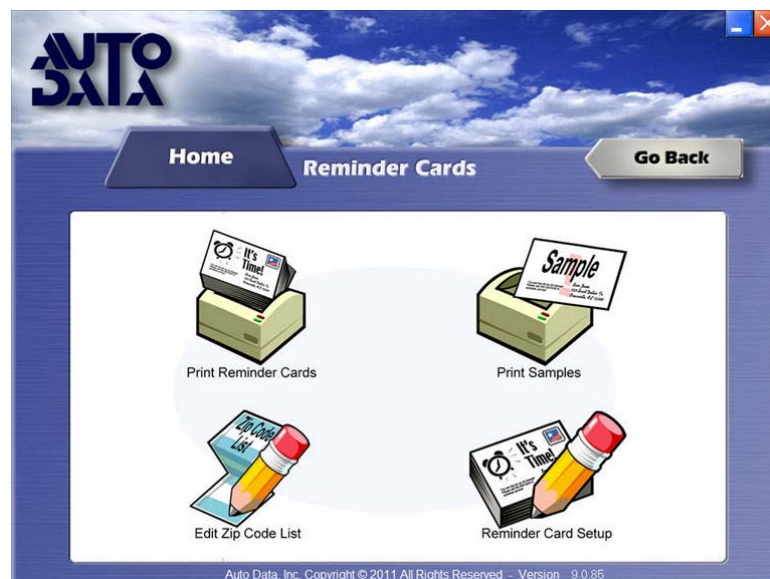
To print reminder cards, go to the **Home** tab on the main menu and select **Reminder Cards**.

Before you begin configuring Reminder Cards however, you will need to follow a few simple steps:

1. Purchase a set of reminder card paper for your HP LaserJet printer. These forms can be ordered from Computer Forms Inc. at 1-800-547-8027.
2. Know which zip codes you would like to send reminders to. Come up with a low zip code (i.e. 12001) and a high one (i.e. 12099) that you would like to include in your mailings.
3. Once you've come up with your range of zip codes, contact Auto Data to have them set up a zip code database.
4. Once Auto Data technical support has setup the zip codes for you, you can do an Auto Update to receive them and edit your zip code list, if necessary.
5. You're ready to begin configuring your reminder cards by going to Reminder Cards Setup.

## Printing Samples

If you would like to see what your cards will look like once they are printed, you can select Print Samples on the reminder cards menu. This will show you the exact placement of data on the cards.



## Editing Zip Codes

To ensure that you send reminder cards to all customers in your area only, you must view and edit your zip code list. The zip code list should contain all the zip codes in your area.

Once you've obtained your zip code list from Auto Data you can add, remove and edit zip codes in the list using the buttons on the Edit Zip Code page.

| Zip Code | City      | State |
|----------|-----------|-------|
| 30003    | NORCROSS  | GA    |
| 30006    | MARIETTA  | GA    |
| 30007    | MARIETTA  | GA    |
| 30008    | MARIETTA  | GA    |
| 30010    | NORCROSS  | GA    |
| 30011    | AUBURN    | GA    |
| 30012    | CONYERS   | GA    |
| 30013    | CONYERS   | GA    |
| 30014    | COVINGTON | GA    |

City: NORCROSS  
State: GA  
Zip: 30003

Buttons: ADD, PRINT, CHANGE, DELETE

- *Add Button*: Allows you to add zip codes to your list.
- *Print Button*: Will print your zip code list.
- *Change Button*: Allows you to change the details of a particular zip code.
- *Delete Button*: Deletes a zip code from your list.

## Reminder Card Setup

You can decide which customers should receive a reminder card. To configure your reminder card program, from the *Reminder Cards* tab, click on *Reminder Card Setup*.



Once you are in *Reminder Card Setup*, click on the radio button next to the line that you want to change.

Click *Go Back* when you are done, and your settings will be saved.

**Reminder Intervals**

☐ First Time Customers after 90 Days

☐ Repeat Customers after 3000 Miles

☐ Discontinue if no visits after 6 Months

**Direct Output To:**

☒ LASER PRINTER

☐ REMINDER FILE

☐ NO PRINTER - NO FILE

☐ EMAIL FILE

**Second Reminder Option**

☐ YES - If customer did not return after first reminder in: Days ☒ NO second reminder

**Custom Message**

☐ LINE 1

☐ LINE 2

☐ LINE 3

**Add to Name**

☐ Put after Name

"or Current Resident"

**Printer Delay**

☐ High Speed Printer with no delay.

**Reminder Intervals** – You can choose at which intervals customers should receive reminder cards.

**Direct Output To:**

- **Laser Printer** - Will print cards directly to your printer.
- **Reminder File** - Will print a list of customers that are due for a reminder card to a REMINDER.CSV file located in a REMINDERS folder on your root drive.
- **No Printer - No File** – This option will select the customers who are due for a reminder card AND have an email address on file and will put them into an EMAIL.CSV file located in a REMINDERS folder on your root drive. Note: Make sure you select EMAIL FILE checkbox!

**Second Reminder Option** – You can select to send a second reminder if a customer has not returned in a specified number of days.

**Custom Message** – You can add a custom message for your customers.

**Add to Name** – Option to add "or Current Resident" to address. This will prevent having reminder cards returned to you if your customer has moved.

**Printer Delay** – Will bypass the 8 second printing delay needed for older printers.



## Reminder Cards: Printing

Once you have edited your zip code list and setup your Reminder Card parameters, you are ready to print your reminder cards.

From the *Reminder Card* tab, click *Print Reminder Cards*.



Select the appropriate store number. If you only have one store, your store number will most likely be 0001. Click *OK* to continue.



Click *Yes* if your reminder cards are loaded in the printer. At this point, your cards will begin printing. If you need to pause the printing, you can click *Go Back*. If you would like to stop the printing, click *Yes* at the prompt.

When the reminder cards are done printing, you will get a message saying the process is complete.



# CHAPTER 8: Reports

## Daily Reports

Z-Report - The nightly sales report.

- Cash Drawer Detail Report - A breakdown of today's sales by payment type.
- Daily Sales Report - A summary report of today's sales activity.
- Employee Incentive Report - A breakdown of sales per employee position.
- Inventory Alert Report - Alerts you of any parts you may need to order immediately.

### Other Daily and Sales Reports

- Work Order - Gives parts and service recommendations for vehicle.
- Oil Light Re-set - Detailed instructions on re-setting oil light.
- Hourly Performance - Gives a breakdown of hourly employee performance.
- Cash Calculator - Used to tally nightly cash.
- Time Clock Report - Provides a list of employees and employee hours.
- Consolidated Daily Sales - Combined sales information for selected date range.
- Fleet Sales Report - Past fleet sales

## End of Month Report

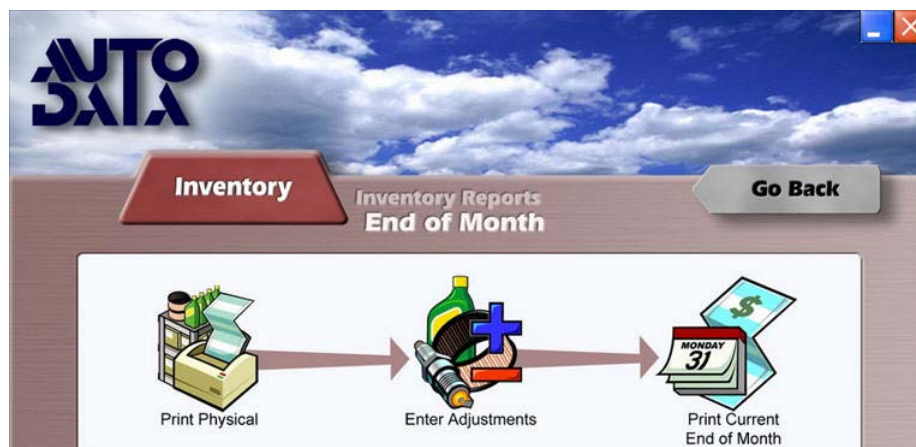
At the close of each month you can print a detailed summary of your inventory. This report, called the End of Month Report, gives a complete breakdown of your inventory on hand as well as your sales information for the month. You also have the option to print the previous month's report with your current report.

**The End of Month Report can only be printed after you close on the last day of the month or before you open on the first day of the month.**

### Printing the End of Month Report

To access the end of month report options, go to the *Inventory* tab, click *Reports*, enter your PIN and then click *End of Month*. Printing the End of Month Report consists of three steps:

1. Printing the Physical Worksheet
2. Entering Adjustments
3. Printing Current End of Month



## Printing the Physical Worksheet

1. Select *Print Physical*.
2. If you would like to print out ALL items in your inventory, click on ALL OF THE ABOVE button.
3. Click *Print All Pages* button at the top of the screen.
4. Count your inventory and record your numbers on the printed worksheet.
5. Compare the computers' "*Quantity-on-hand*" with your actual on-shelf quantities.

## Entering Adjustments

If you have any discrepancies between what the computer says you have and what you actually have you need to enter adjustments.

1. From the *End of Month* menu, click *Enter Adjustments*.
2. Browse to the part you would like to adjust.
3. Make sure the correct part number is highlighted.
4. Click the *Enter Data* button.
5. Enter the actual number on hand.
6. Press <Enter>.
7. Go back and repeat steps 2-6 for every part you need to adjust.

## Printing Current End of Month

Once your computer quantities match your on-shelf quantities, you are ready to print your *End of Month* Report.

1. Make sure you have enough paper in your printer. You will probably need 30-40 pages, depending on the number of parts and services in your inventory.
2. Click *Print Current End of Month*.

**NOTE:** If you are trying to close out for the month, DO NOT print the Previous End of Month as it is not the correct End of Month report. To properly close out for the month you MUST print the Current End of Month.

## Year End Report

At the conclusion of your fiscal year, you will print the *Year End Report*. This report will give you a complete breakdown of your inventory for the fiscal year. This report must be printed after you print your *End of Month* report.

## Printing The Report

1. From the *Home* tab on the main menu, select *Miscellaneous*.
2. Select *End of Year Closing* and click *Yes* when asked if you are sure that you want to close out.

**NOTE:** DO NOT do this unless it is the end of the year! If you do a Year End Closeout and it is not the end of the year you will not be able to open again for any date in that calendar year.

# CHAPTER 9: Hardware

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## HP LaserJet P2035n Receipt Printer

Auto Data's Point-of-Sale systems use HP LaserJet printers for printing receipts and work orders. As of this writing the printer that is currently available for purchase and is supported is the HP LaserJet P2035n. Other printers that are also supported but no longer manufactured are the HP LaserJets 1320, 1160 and P2015. The HP LaserJet prints on plain white paper, and prints your logo in the top left corner of your receipts. If your printer is not printing or printing improperly you can go to our FAQ - Troubleshooting page to find answers to our most commonly asked questions.



If you are having trouble printing from a 3rd party software package such as Microsoft® Word™ or Excel™, please contact Hewlett Packard® or visit the Hewlett Packard's® website. If you are having trouble printing in the Point-of-Sale, call 1-800-583-LUBE (5823) to reach our technical support department.

### Installation

Before you install your HP LaserJet, please follow HP's guidelines for installing the toner cartridge and printer cable. Ensure that you remove any orange tape or tabs from the printer and the toner cartridge before attempting to use the printer. Install the printer drivers from the CD or follow any directions provided with the printer.

Once that is done and you are able to print a test page from Windows, call Auto Data for help in setting the printer up for use with the Pos-I-Lube software.

### To test the printer in Pos-I-Lube:

- From the *Home* tab, click *Miscellaneous*.
- Select *Store Setup*.
- Select *Hardware Setup*.
- Select *Receipt Printer*.
- Select *HP LaserJet Printer* on appropriate port.
- Select *Test This Printer*.
- Your printer should now be functioning. Be sure to re-start the *Auto Scan* program so that it can pick up the new printer settings.

## Static Sticker Printer

Auto Data supports two types of static sticker printers. They include the Cognitive Advantage LX and the Del Sol LX.

Installation NOTE: No drivers are necessary to run the static printers. Any attempt to load these drivers may cause your printer to stop functioning properly.

- From the *Home* tab, select *Miscellaneous*.
- Select *Store Setup*.
- Select *Hardware Setup* and enter your password.
- Select *Static Sticker Printer*.
- Select the appropriate option depending on your type of sticker printer.
- Finally, select *First Time Setup* and follow the directions on the screen to calibrate your printer.

Once you have completed these steps, you can click the *Test This Printer* button to print a test sticker, however the best test of the printer is to print a sticker from within the *Point-of-Sale* using a Car I.D.

## General Tips

Print one sticker at a time, then tear the sticker off. Printing several stickers at a time and leaving them hanging will drag the stickers down while printing and will result in poor print quality.

Auto Data only supports stickers and ribbons from Communications Graphics, or Computer Forms Inc (CFI). Please contact CFI at 800-547-8027 if you need to place an order.

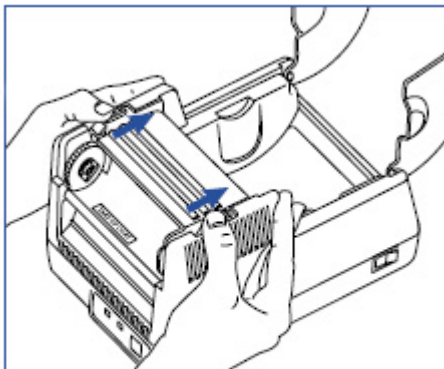
Keep the thermal printer in a cool area, away from direct sunlight.

Store static stickers and ribbons in a cool area. If these are stored in heated weather they may be damaged, which would result in poor print quality.

## Advantage LX

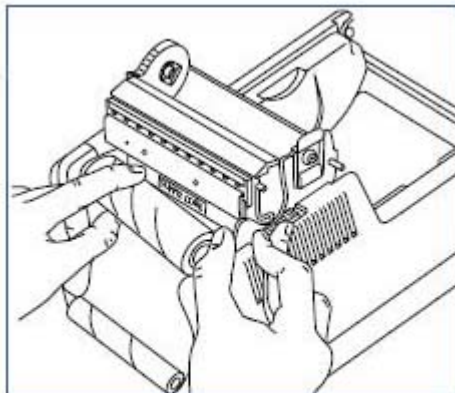


## To Open Printhead

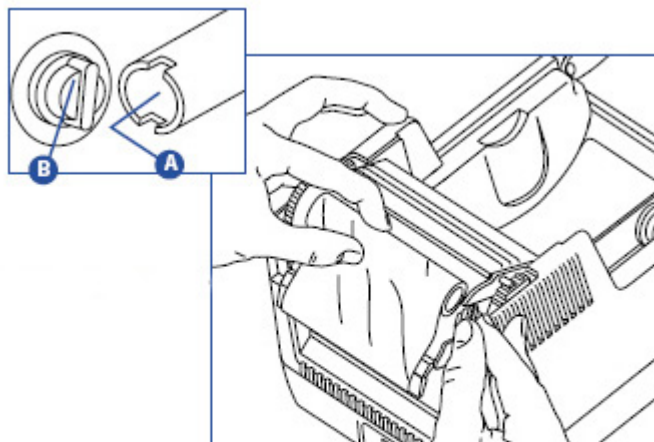


Open the dust cover. Slide back the black latches to release the print mechanism. Raise the mechanism to prepare to load print media or ribbon and to clean the printer.

## To Load Ribbon



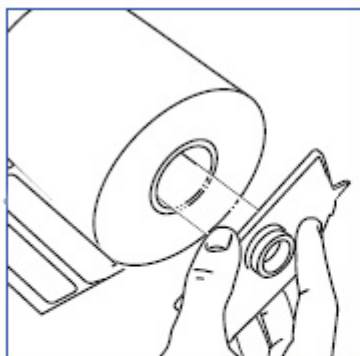
Unwind a few inches of the new ribbon from the supply core. Pull gently on the supply core mount flexible arm and insert the ribbon supply roll.



Turn the ribbon takeup core **A** (see inset) to align the slotted end with the takeup mount **C**. Gently pull the flexible arm out and snap the takeup core into place.

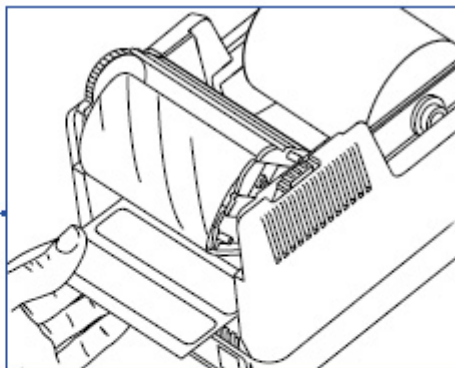
**Note:** The printer automatically takes up the slack in the ribbon.

## To Load Stickers



Lift out the media spindle. Load the media onto the spindle, keeping the black media guide to the right of the media roll.

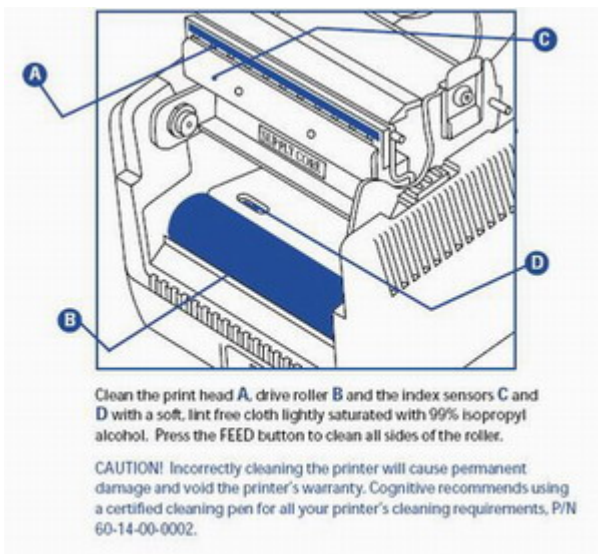
**IMPORTANT!** The imaging surface must face up as it passes under the print mechanism.



Place the loaded media spindle in the printer with the black guide to the right. Feed the media under the open print mechanism.

**Note:** The media spindle should fit securely with the black guide pressed securely against the media roll.

## Maintenance (Recommended with every new roll)



Clean the print head **A**, drive roller **B** and the index sensors **C** and **D** with a soft, lint free cloth lightly saturated with 99% isopropyl alcohol. Press the FEED button to clean all sides of the roller.

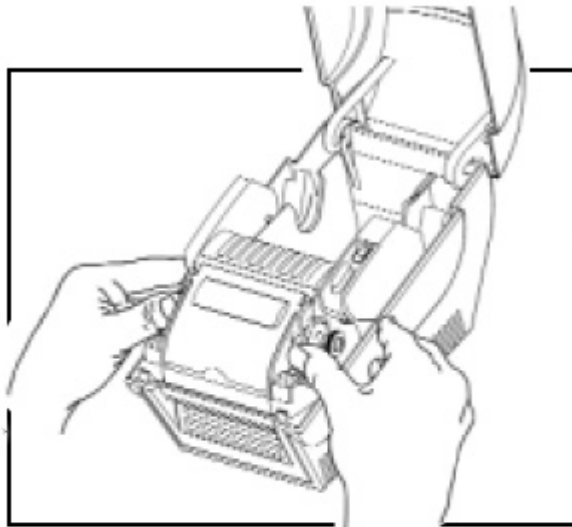
**CAUTION!** Incorrectly cleaning the printer will cause permanent damage and void the printer's warranty. Cognitive recommends using a certified cleaning pen for all your printer's cleaning requirements, P/N 60-14-00-0002.



## Del Sol LX



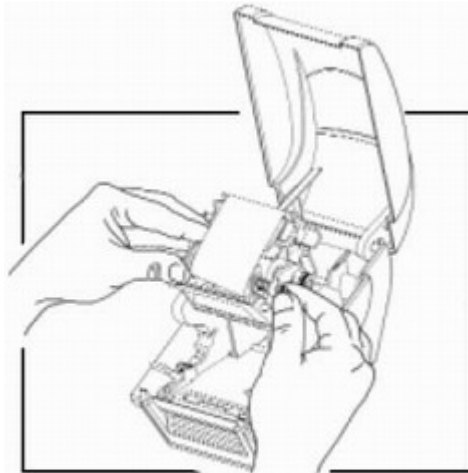
### Open Printer



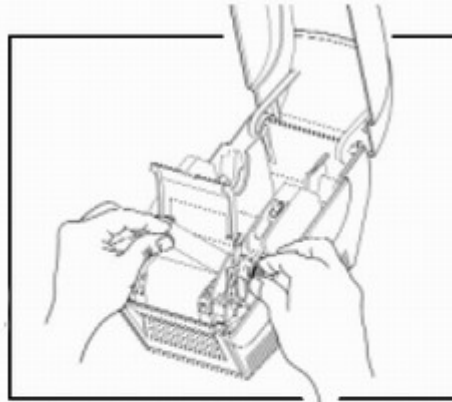
Open the dust cover. Press the black latches to release the print mechanism, then lift the mechanism until it locks in place.

Note: The printhead latches require some force to release.

## Load Ribbon



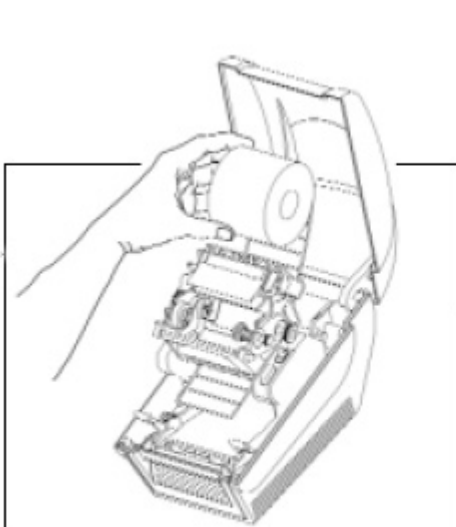
A. Pull out the small green knob and hold. Align the ribbon supply roll notches with the mounts and release the knob.



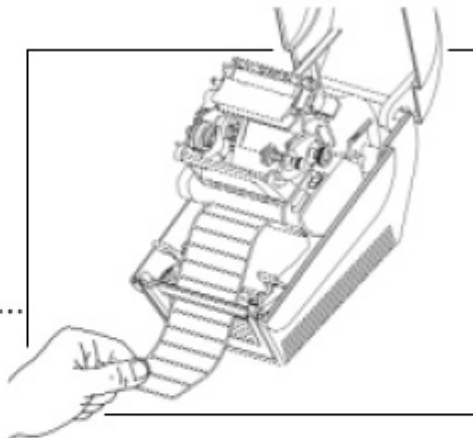
B. Lower the print mechanism and open the mechanism cover. Install the take-up core in the same way as the supply roll. Turn the take up knob clockwise until the ribbon is taut.

Note: A little wrinkling in the ribbon is normal and will not cause printing problems.

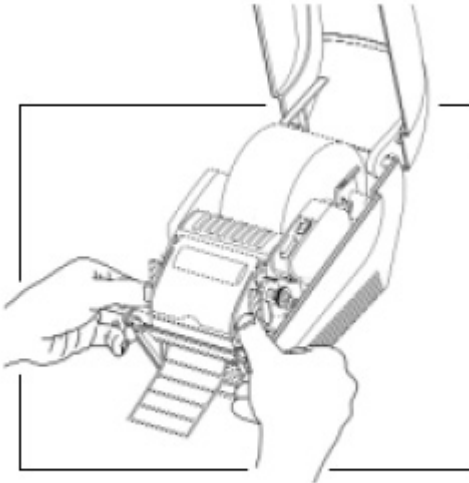
## Load Stickers



A. Load the media with the imaging side face up.



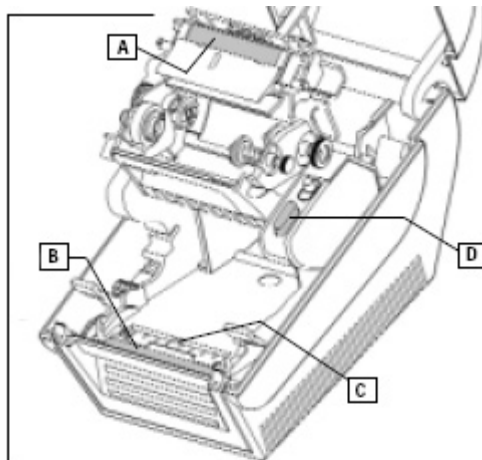
B. Slide the media under the print head and through the slot in the front panel. Pull the media taut.



C. Lower the print mechanism and press down firmly to secure both latches.

Note: The latches click when fully closed.

## Maintenance (Recommended with every new roll)



Clean the print head (A), drive roller (B) and the Index sensor (C) with a soft, lint free cloth saturated with 99% Isopropyl alcohol. Press the FEED button (D) to clean all sides of the roller.

**Caution!** Incorrectly cleaning the printer will cause permanent damage and void the printer's warranty. Cognitive recommends using a certified cleaning pen for all your printer's cleaning requirements, P/N 60-14-00-0002.

# Scanner

The portable scanner unit has two components: the handheld device and the cradle that relays the information from the CPU to the scanner unit.



## Hardware Installation

1. Make sure the CPU is powered off.
2. Plug the data cable from the cradle to COM2 on the back of your CPU.
3. Plug the end of the data cable that looks like a large telephone plug, into the cradle.
4. Plug the power cable into the cradle.
5. Plug the power supply into your power outlet.
6. Turn on your CPU.

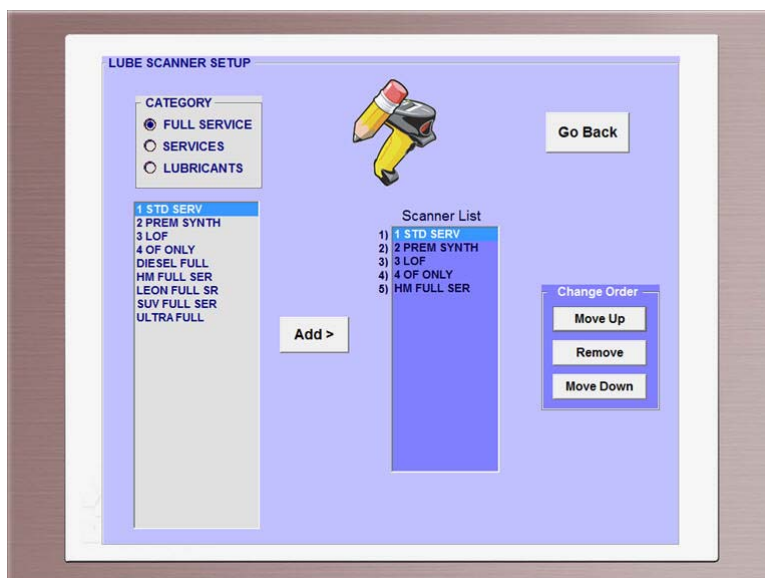
Your handheld should now be ready to use. If you have any problems please contact [Support](#).

NOTE: If this unit is an upgrade to your system you may need to call technical support for further configuration.

## Scanner Inventory Setup

On computer:

1. Go to *Inventory* tab and click on *Scanner Setup*
2. Click on the radio button next to *Full Services* and add the services you would like to appear on your scanner. Repeat for *Services* and *Lubricants*.



On Scanner:

1. Press the (\*) key to return to the main menu.
2. When the prompt says Autoscan options, scroll down to option 3.
3. Press Enter to upload inventory. Your inventory changes will now reflect on the scanner.

### How to use Scanner

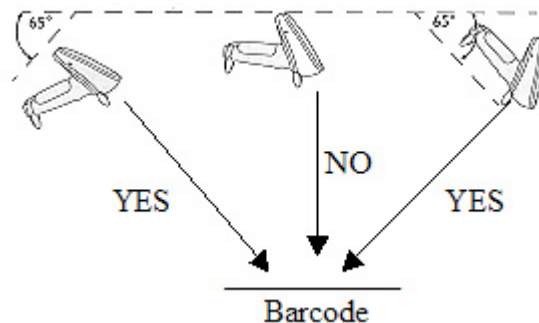
When you first pick up the scanner it should say "Greet Customer". Press Enter on the scanner and it will say "Scan Vehicle". The scanner is now ready to use.

1. Scan the VIN barcode of the vehicle in the door-jam or windshield for GM's.
2. Repeat customer's name will show on the scanner and you can enter the mileage.  
Or – A new customer's vehicle information will display. You will also need to enter the mileage and then enter the customer's name and address on the computer, at cash out.
3. The oil that was used on the last visit will display, and you can confirm or change it.
4. You can review the customer's service history right from AutoScan.
5. Select the type of full service and sell any needed add-on services
6. Print the Chek-Chart work order and static sticker and move on to the next vehicle.

Now you can open the customer list in your Point-of-Sale and pick the customer listed as "AUTOSCAN". If the customer is new, you will need to enter the customer information(name, address, etc.) before cashing them out.

### Scanner Tips

- Scan at an angle, not directly at the bar code



- Closer isn't better, back the scanner away from the bar code so that you scan the entire bar code and some area on both sides of bar code.



- One effective technique is to start with the scan line off the bar code, then move it onto the bar code.



### Scanner Troubleshooting

If you are getting scanner errors:

1. From scanner main menu, select 4) Test Scanner
2. Stand within 3 feet of the cradle.
3. Select SHORT RANGE TEST
4. If the scanner reports CRADLE: FAILED then either the cradle has no power or the scanner is not paired with the cradle.
5. If scanner reports COMPUTER: FAILED, then either the serial cable is not plugged in properly or Auto Scan is not running.
6. When the scanner reports CRADLE: PASS and COMPUTER: PASS, proceed to the LONG RANGE TEST.
7. If the scanner reports SEND: FAILED, SEND: WEAK, or RECEIVE: WEAK then scanner is out of range or obstructed by a large object or being interfered with by a cordless phone, etc. and that location is outside the effective transmission range. (Logic would suggest that a FAILED transmission is further out of range than a WEAK transmission.)
8. Move around the shop repeating the LONG RANGE TEST until an effective Scanner Transmission Range is determined. If the range is not acceptable then:
  - a. Make sure there is not a cordless phone in the shop.
  - b. Relocate the cradle (using a longer serial cable if necessary) to a better location and repeat the entire process starting with the SHORT RANGE TEST.

### Additional things to check:

- Exit out to Windows and make sure the Auto Scan program is running, if not click on scanner icon to open Auto Scan and try to scan a car again.
- If program is running, close it and open it again.
- Unplug both cables from cradle and then plug them back in.
- Pair the scanner with the cradle. To do this:
  1. Press Enter on the scanner to clear the error code.
  2. Press the (\*) key to get back to the main menu.
  3. Scroll to option 2 (New Shipment) and press Enter.
  4. When the prompt says SCAN BOX, scan the barcode on the scanner cradle.
  5. Press the (\*) key to get back to the main menu.
  6. Scroll to option 3(Upload Inventory) and press Enter.



- If you were able to complete these steps without a scanner error, your scanner should be ready to use.
- Make sure you are not using a 2.4ghz phone or device in the same location where you operate the scanner, this is a known issue.
- Make sure your scanner is plugged into COM2.
- Check scanner cables for any cuts.
- Make sure your scanner is fully charged.
- If you are having trouble pairing the scanner, you may remove the battery and re-insert it and try pairing again.

If you are still not able to scan a vehicle, contact Auto Data Technical Support.

## VIN Grabber

The portable scanner unit has two components: the handheld device and the base that relays the information from the CPU to the scanner unit.

### Installation

1. Make sure the CPU is powered off.
2. Plug the data cable from the handheld base to the your COM2 port.
3. Plug the end of the data cable, that looks like a large telephone plug, into the handheld base.
4. Plug the power cable into the data cable that is plugged into the computer.
5. Plug the power supply into your power outlet.
6. Turn on your CPU.

Your handheld should now be ready to use. If you have any problems please contact Support

\*NOTE: If this unit is an upgrade to your system you may need to call technical support for further configuration.

### How to use

Once your scanner has been installed and configured, all you need to do is make sure the AutoScan program is running on your computer and then scan a car. It's that simple. To pick up your recently scanned customer, open your Point-of-Sale and select the customer that says VIN GRABBER.

### Troubleshooting

If you are having trouble scanning VINS: Exit out from the Pos-i-Lube software to your Windows page and make sure your AutoScan program is running. It should be running at all times.

Close the AutoScan program and open it again by clicking on the scanner icon.

If your scanner beeps, but the customer doesn't transfer into Point-of-Sale, try pairing your scanner with the cradle by scanning the bar code on the cradle and then scanning another vehicle.

If you are still not able to successfully scan a vehicle, call technical support.

# Cash Drawer

Auto Data supports one model of the Indiana Cash Drawer and the APG USB cash drawer. These drawers can only be purchased from Auto Data if they are to open automatically from your point of sale. If your drawer was purchased from another source, you will not be able to receive support for it from Auto Data.

## Installation

No changes must be made to the software when installing your cash drawer. Once you have connected your drawer you can test it from the software:

1. Go to Home tab, followed by Miscellaneous.
2. Select Store Setup, Hardware Setup and then Cash Drawer.
3. Select either USB Cash Drawer or Indiana Cash Drawer (depending on your unit).
4. Click on the Test Cash Drawer button to pop the cash drawer.

If the drawer does not pop, check each connection and make sure that the drawer is un-locked (key hole straight-up).

## APG Cash Drawer

Plug in USB cable to bottom of drawer and then other end to the back of your CPU.

### Additional Troubleshooting for USB Drawer:

1. Plug the USB cable from the cash drawer to the computer.
2. Open the cash drawer.
3. Take the till out.
4. Push up on the cash drawer and pull it out(past the stopper on the bottom).
5. Use the following to determine the problem then continue:
  - Blinking lights back and forth (like a rail road track) means the drawer has connection with the computer
  - Blinking lights at the same time means the drawer has power but no connection to the computer
  - No blinking lights means the drawer is not getting power, check USB cable
6. Unscrew the 2 screws on the bottom of the Cash drawer.
7. Pull out the piece you just unscrewed
8. Make sure all connections are plugged correctly.
9. Re-screw the metal piece and test again.

If your cash drawer still does not open, call Auto Data.

## Indiana Cash Drawer

Make sure that both the data cable and the power supply are connected when you install your cash drawer. The data cable is connected to the port on the back of your CPU that is labeled Cash Drawer.

# FREQUENTLY ASKED QUESTIONS

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## Daily Operations

### HOW DO I SWITCH BETWEEN CUSTOMERS IN MY CUSTOMER WAITING LIST?

Your active customers are saved in your customer waiting list until you are ready to cash them out. To switch to another active customer, click on their vehicle type in the customer list on the left side of the screen. To start a new customer, click on an empty number. To view your entire open customer list, either press the <Insert> key on your keyboard, or right-click your mouse in the Point of Sale screen.

### HOW CAN I REMOVE "IN-USE" CUSTOMERS FROM MY CUSTOMER WAITING LIST?

Use the Unlock In-Use Customer Feature. Customer information will not be lost using this feature. From the Home tab on the main menu select Miscellaneous. Select Store Setup, followed by Software Setup. Finally, select "Unlock In-Use Customers." The process takes only a few seconds. Once you're done you can return to the Point-of-Sale.

### IS IT POSSIBLE TO WRITE AN ESTIMATE?

Yes, simply select Estimate as the payment type.

### HOW DO I VOID A RECEIPT AFTER CASHING OUT A CUSTOMER?

If it is necessary to void a customer after cash out, you can use the Void feature. Simply click Void from the main Point-of-Sale menu and then click Plus or Minus to scroll through your cashed-out tickets. Once you find the ticket you would like to void, click Void. Remember that you can only void tickets on the same day.

### HOW DO I REPRINT A RECEIPT FROM A PREVIOUS DAY?

First, pull up the customer and go to their history. Click *View History* and scroll the report to find the date of the visit you would like to reprint. Return to the main *History* menu. Click *Reprint receipts* and you will see all the visit dates and any receipts available for reprinting will have a receipt number next to the visit date. If there is an *n/a* next to the visit date, this customer was cashed out with version of the point of sale that did not save receipt data and therefore cannot be reprinted. If there is a receipt number present, click that line and a duplicate receipt will be sent to your receipt printer.

## HOW DO I VIEW A CUSTOMER'S HISTORY WITHOUT HAVING TO CANCEL THE RECEIPT?

With the new *Review Customer* in version 9 of *Pos-I-Lube* you can 1) review a history, 2) reprint a receipt, and/or 3) make changes to contact information without having to print a receipt or cancel the customer. To start a *Review Customer*, go to *Customer*, and then select *Review Customer*, click *Search* and locate the customer. Enter the mileage, if available. Now you have access to the customer's information. When you are done with your changes, click *Save*.

## HOW DO I CASH OUT A TOP OFF?

First, you have to add the top off service to your inventory. To do this 1) Go to your inventory services setup and select an available product code 2) Enter "TOP OFF" as the new service name 3) Click *Change* and set *Call Up Lubricants* to "Y".

A top off service will only be allowed within 3,000 miles of the last full service. To cash out the top off service, select *Top Off* from your Services list and select the oil and quantity. The maximum quantity allowed for a top off is 1 quart. Make sure top off is the only item on the ticket. Finally, select *Top Off* as payment type and click *Final OK* to print the receipt.

## HOW DOES THE CUSTOMER LOYALTY PROGRAM WORK?

Now you can reward your most loyal customers with a free service. Every time your customer purchases a full service, a point is added to their total. To check a customers' point total, go to their history and look under the heading *Customer Loyalty Program*. The customer will be allowed a free service on the visit after reaching their points' goal. You will receive a reminder on the day the free service is due. If the free service is redeemed, you have the option to re-set the customers points total to zero. Call Auto Data to activate this free feature.

## WHY SHOULD I DO A DAILY BACKUP?

Data Protection. Your backup should be done daily to keep important information current. In case of hardware failure, everything we need to get you back up and running will be on your pen drive. Fortunately, after closing, your daily backup runs automatically if you have your USB pen drive plugged in. If you forgot to plug in your drive and the backup fails, simply plug in your drive and go to the main *CASH* tab and click *Backup*.

## WHY DO I GET AN ERROR WHEN I TRY TO CONNECT WITH AUTOPOLL.NET OR TRY TO RUN AN AUTOUPDATE?

One of the main reasons you might have trouble running an Autopoll is that you may not have an available internet connection. Check and make sure you have a phone line connected to your computer's modem. In case you use DSL to connect, make sure you can access an internet page. If you cannot access an internet page, you may need to power cycle your DSL modem or contact your internet service provider. Once you are able to access the internet, you will most likely be able to run an Autopoll. If your Autopoll fails, try again later. If it consistently fails, contact Auto Data technical support.

## WHY AM I GETTING THIS MESSAGE "YOUR SUBSCRIPTION TO PARTS PRONTO HAS EXPIRED"

Parts Pronto is the service that enables you to see manufacturer recommended part numbers and vehicle specifications on your work orders. This is a quarterly service, which is renewed when you pay your quarterly bill. In some cases, this is a monthly subscription. When your subscription expires, you will see a courtesy message and you will have the option to check online for updates. If you have already paid and see this message, click Yes to update and your renewal should download.

## WHY CAN'T I LOOK-UP MY FLEET ACCOUNTS IN POS?

Verify that your Fleet Lookup is on. From the Home tab on the main menu select Miscellaneous. Select Store Setup, followed by Software Setup. Go to Store Information Setup. Verify that Fleet Lookup is turned on. Select Go Back, and select Fleet Management to manage your fleet list.

## WHY AM I NOT ABLE TO VIEW A WORK ORDER?

Your Parts Pronto subscription may have expired. Parts Pronto is the service that enables you to see manufacturer recommended part numbers and vehicle specifications on your work orders. This is a service which is renewed when you pay your quarterly bill.

If you have already paid to renew and still cannot view a work order, just run an Auto Update to download your renewal. If you have not paid to renew, you need to call Auto Data when you are ready to re-subscribe to Parts Pronto.

# Network Troubleshooting

## WHY IS MY BAY COMPUTER NOT PULLING UP POINT-OF-SALE?

Lost Network Connection. Your bay computer reads the Point-of-Sale program from your server computer. If the bay is not pulling up the Point-of-Sale, then your network might have lost connectivity. Check your network cables. Try power-cycling your print server, by unplugging the power to it for twenty seconds and then plugging it back in. You can also try shutting down the computers in this order: 1) Shut down bay 2) Shut down server 3) Start up server and 4) Start up bay.

## WHY DO I GET THIS MESSAGE: "PRINT SERVER IS NOT READY"?

Lost Network Connection. Your print server might have temporarily lost network connection. Try locating your print server (this will be the small box which will have your computer and your printer plugged into it), unplugging the power to it for twenty seconds and then plugging the power back in.

# Printer Troubleshooting

## WHY IS MY RECEIPT / WORK ORDER PRINTER NO LONGER PRINTING OR PRINTING IMPROPERLY?

Regardless of the error message, test each of the following procedures.

1. Reset printer by turning printer off and turning it on again. If printer still fails proceed to troubleshooting step 2.
2. Check the cable and power connections. Unplug and re-plug the connection between the printer cable and the printer as well as the connection between the printer cable and the computer. After you verify that the printer connections are properly and securely connected, and that the power is on, then go to step 3.
3. Replace toner cartridge and print a work order or receipt. If printer fails proceed to step 4.
4. Verify the status of the printer. Unplug and switch both printers. If printer fails after being switched, and printer failed after step 1, then the failure in the printer, the cable, or the printer port. Call Auto Data technical support for further assistance.

## WHY IS MY RECEIPT / WORK ORDER PRINTER GIVING THE ERROR MESSAGE "OUT OF PAPER" WHEN THERE IS PAPER IN THE PRINTER?

For the HP LaserJet's verify that the paper is loaded correctly and that there is not too much paper in the paper tray. Verify that the green ready light is on and that the yellow warning light is not flashing. Check the connections on the printer and the computer and finally unplug the printer and plug it back in. If you have anymore problems contact Auto Data for further assistance.



## WHY IS MY STATIC PRINTER NOT PRINTING CORRECTLY AFTER I RELOAD MY STATIC RIBBON OR STICKERS?

Your printer may need to be re-calibrated. After the printer has been reloaded it is sometimes necessary to recalibrate the printer within the Pos-i-Lube program. From the Home tab on the main menu, select Miscellaneous. Select Store Setup followed by Hardware Setup. Finally select Static Sticker Printer. Select First time setup. Follow the procedures as directed. If this does not help, or results in a red light on your sticker printer, try using the diagrams in the sticker printer section of the manual to re-load stickers and ribbon.

## WHY AM I NOT ABLE TO PRINT STATIC STICKERS?

Check your static sticker printer and make sure it is ON and has a green ready light. If you have a red light, try re-loading stickers and re-loading ribbon and closing printer cover correctly. Check in Hardware Setup in your Pos-i-Lube program and make sure correct sticker printer is selected. If stickers are still not printing, check network and try a first time setup.

## Scanner Troubleshooting

### WHAT DO I DO IF I AM GETTING ERRORS ON MY SCANNER?

1. From scanner main menu, select 4) Test Scanner
2. Stand within 3 feet of the cradle.
3. Select SHORT RANGE TEST
4. If the scanner reports CRADLE: FAILED then either the cradle has no power or the scanner is not paired with the cradle.
5. If scanner reports COMPUTER: FAILED, then either the serial cable is not plugged in properly or Auto Scan is not running.
6. When the scanner reports CRADLE: PASS and COMPUTER: PASS, proceed to the LONG RANGE TEST.
7. If the scanner reports SEND: FAILED, SEND: WEAK, or RECEIVE: WEAK then scanner is out of range or obstructed by a large object or being interfered with by a cordless phone, etc. and that location is outside the effective transmission range. (Logic would suggest that a FAILED transmission is further out of range than a WEAK transmission.)
8. Move around the shop repeating the LONG RANGE TEST until an effective Scanner Transmission Range is determined. If the range is not acceptable then:
  - a. Make sure there is not a cordless phone in the shop.
  - b. Relocate the cradle (using a longer serial cable if necessary) to a better location and repeat the entire process starting with the SHORT RANGE TEST.

For additional scanner troubleshooting, please check the scanner section of this manual.

## WHY AM I NOT GETTING A STICKER WHEN I SCAN A CAR?

First, try printing a sticker from the Point-of-Sale. If you are able to print a sticker from the Point-of-Sale and not from the scanner, try closing your Auto Scan program and re-opening it. This will allow the scanner to pick up any recent changes to your system and should enable you to print a sticker.

## Software Troubleshooting

### WHY AM I GETTING INCORRECT CUSTOMER INFORMATION OR NO INFORMATION WHEN I ENTER A CUSTOMER'S LICENSE PLATE NUMBER?

Customer database needs to be re-indexed. Over time it becomes necessary to re-index or re-organize the information in your customer database. From the Home tab on the main menu, select Miscellaneous. Then select Re-Index Customer History. Follow the prompts. This process should take only a couple of minutes.

### WHY CAN'T I DO A DAILY BACK-UP?

Your back-up drive is possibly defective. It is possible that your daily back-up pen drive has become full or damaged. Please delete any information on the pen drive that is not Auto Data related. After doing this, select Backup from the Cash tab on the main menu. If backup continues to fail, call Auto Data for further instructions.

## Inventory FAQ

### WHY CAN'T I ENTER A NEW PART IN THE PARTS CATEGORY?

You may need to first create a new service category. First go to the Services menu and verify that a service category exists for that particular part. A part category requires that you have an existing service in that same product code in the services section before you can create parts.

### WHY CAN'T I SELECT YES TO "PRICED BY PARTS" IN THE SERVICES CATEGORY OF INVENTORY MANAGEMENT?

You must first verify that a parts category has been created in the Parts menu. Remember that all service categories must be in the same numbered category for the corresponding parts category. If the service is in service category 30 then the related parts must also be in parts category 30. To set Priced By Parts to Yes, Call Up Parts must first be set to Yes.