Navex POS
Updates/Revisions

Introduction

This document covers 8.6, 8.7, and 8.8 version releases of Navex POS including the latest features, enhancements, and fixes that are is in version 8.8. This documentation assumes that daily tasks such as adding parts, customers, inventory, accounting, and repair orders can be performed without assistance.

Objective

The goal of this document is to provide users a historical record of updates and revisions of the Navex POS and act as a guide for learning the new features.

POS Support

For POS Support contact the TBC Helpdesk to generate a support ticket

Contact	Phone	Email
TBC Helpdesk	**(800) 344-7029**	**support@tbccorp.com**

Purchasing/Inventory

For questions regarding Code Management (sublines, master codes, group codes, line codes)

Contact	Phone	Email
Chad Combe	**(303) 728-5510**	**ccombe@bigotires.com**
James Rowe	**(561) 383 3000 ext. 2230**	**jrowe@tirekingdom.com**

Corporate

For general Franchisee questions

Contact	Phone	Email
Gail Abanto	**(303) 728-5580**	**gabanto@tbccorp.com**
Jonathan Uhlar	**(303) 728-5593**	**juhlar@tbccorp.com**

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National Accounts Maintenance

Approved National Accounts are now centrally managed by Big O Corporate. To view and download approved National Accounts, the user goes to Administration/National Accounts Download. A screen defaulting to Existing Accounts appears. This shows those approved National Accounts already setup in your system.

Download National Accounts

Search [   ] 🔍

Show ○ Only **EXISTING** Accounts
○ Only **NEW** Accounts
○ Only **EXPIRED** Accounts
⦿ ALL Records

Select Account to Add or Edit by clicking the button in the A/E column below.

A/E	CustNO	Company	Address	City	State	Zip	Url	Region
	NAT-940	180 CONNECT	6050 E. 58TH AVE.	COMMERCE CITY	CO	80022	USA	
	NAT-811	24 TRANSPORT	1300 N. CREEK DR.	SAGINAW	TX	76179	USA	
	NAT-531	30TH STREET MOTORS	29 N 30TH ST	LAS VEGAS	NV	89101	USA	
	NAT-812	3P DELIVERY	1851 WEST OAK PARKWAY	MARIETTA	GA	30062	USA	
	NAT-1234	3ZERO3 MOTORSPORTS	8065 W. 48TH AVE.	WHEAT RIDGE	CO	80033		
	NAT-1262	502 MOTORING LLC	11710 SHELBYVILLE RD.	LOUISVILLE	KY	40243		
	NAT-908	A BETTER RESTORATION	7000 N. BROADWAY	DENVER	CO	80221	USA	
	NAT-285	A.G. WASSENAAR, INC.	2180 S IVANHOE ST E	DENVER	CO	80222	USA	http://www.b
	NAT-532	AA PRESTIGE AUTO CENTER	1719 INDUSTRIAL RD	LAS VEGAS	NV	89102	USA	
	NAT-1869	AAMCO	12156 SAN PABLO AVE.	RICHMOND	CA			
	NAT-941	ABBOTT LABS	22221 E. BELLEVIEW PL.	AURORA	CO	80015	USA	
	NAT-1586	ABRA AUTO BODY	9115 COMMERCE CENTER CIRCLE	HIGHLANDS RANCH	CO	80129		
	NAT-1587	ABRA AUTO BODY AND GLASS	10128 W. CHATFIELD AVE.	LITTLETON	CO	80128		

❌ Close

Creating New Accounts

Select the radio button for "Only NEW Accounts" to view those approved national accounts that are NOT currently in your system. To add any of these accounts to your system, highlight the account by clicking on the corresponding box in the left column and add.

After selecting the account to add, the screen below will appear which will allow you to customize any of the fields not shaded in Blue. Click "OK to Charge" and select the proper terms.

The system will now prompt you if you try to save as a Cash Account when OK to Charge is checked.

Notice in the Customer file that the National Acct Checkbox is checked, but grayed out. This is to insure that National Account customers are managed only from the National Account Maintenance screen.
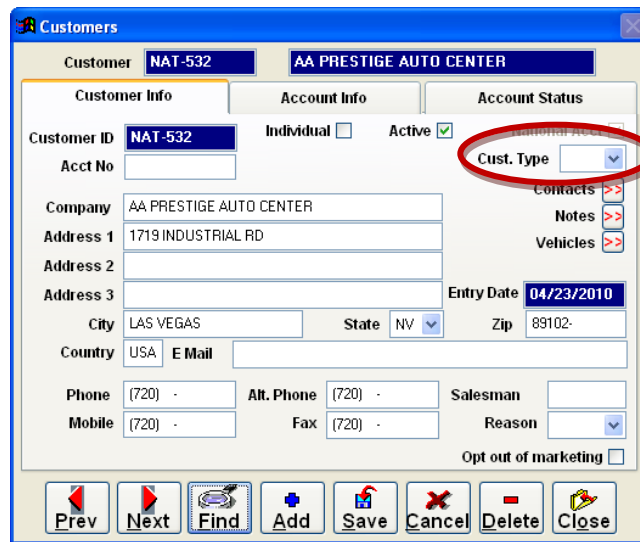
To view EXPIRED national accounts – those no longer on the approved list – choose the radio button on the right that says "Only EXPIRED Accounts". This will compare the approved list maintained by Big O to the list in your database and change the status accordingly.
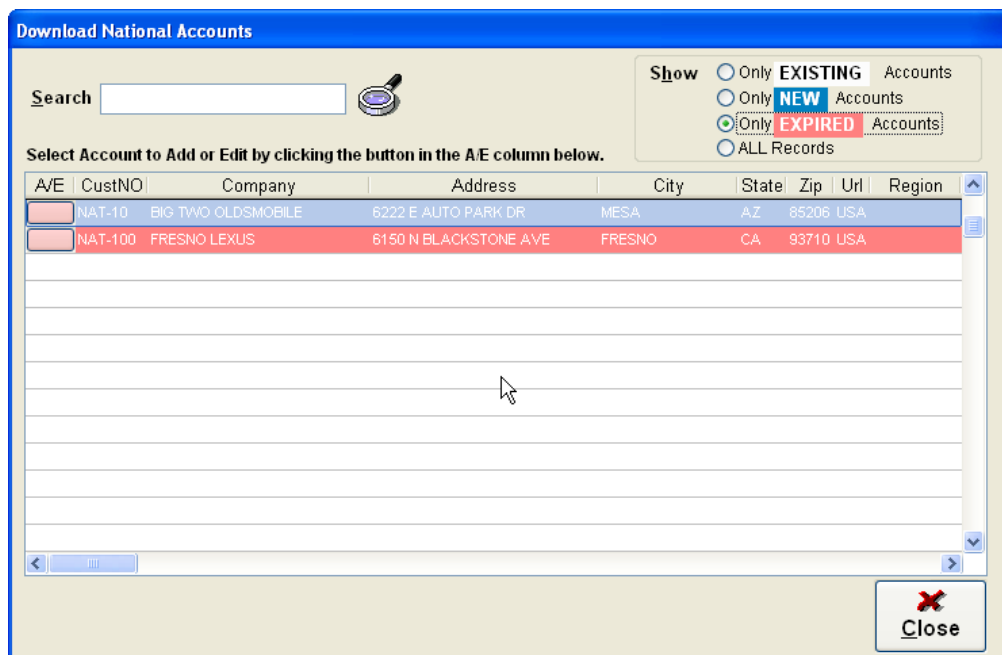
Standardized Codes

Master Codes

Go to Inventory>Maintenance>Master Codes – all Master Codes are maintained centrally and can only be added or edited through the central server now.

Master Code	Description	Sort Code
FEE	FEES AND EXPENSES	005
OTD	OTHER TIRE DEPT	002
SHP	SHOP SUPPLIES	007
SVC	SERVICE	004
TID	TIRE/SERVICE DISCOUNTS	003
TIR	TIRES AND WHEELS	001
TRT	TIRE TAX	006

System Lock Down

Group codes are automatically maiontained from central server…

OK
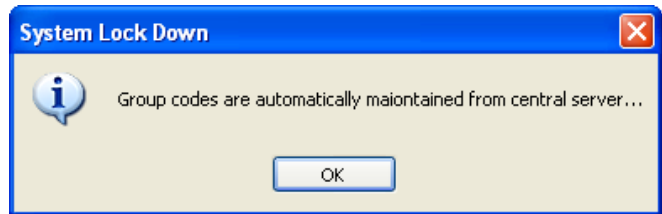
Group Codes

Go to Inventory>Maintenance>Group Codes – all Group Codes are maintained centrally and can only be added or edited through the central server now.

Group Code	Description	Sort Code	Master Code
ACPL	AC PARTS & LABOR		SVC
ADV	LOW COST/ECONOMY TIRES		TIR
ALPL	ALIGNMENT PARTS & LABOR		SVC
BATA	BATTERIES & LABOR		SVC
BOSU	BIG O II EXCLUSIVE TIRES		TIR
BOT	BIG O TIRES		TIR
BPL	BRAKE PARTS & LABOR		SVC
DSCS	SERVICE DISCOUNTS/COUPONS		FEE
DSCT	TIRE DISCOUNTS/COUPONS		TID
DSPF	DISPOSAL FEES		FEE
ENVF	ENVIRONMENTAL FEES		FEE
FEPL	FRONT END PARTS & LABOR		SVC
FET	FET		FEE
FLSH	FLUSHES		SVC
FLUSH	FLUSH PARTS & LABOR		SVC
LOF	OIL CHANGE PARTS & LABOR		SVC

System Lock Down

Group codes are automatically maiontained from central server…

OK
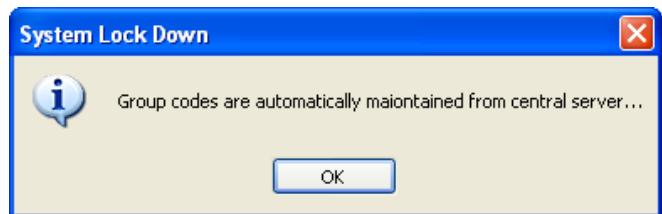
Line Codes

Go to Inventory>Maintenance>Line Codes – This opens the Line Code File Maintenance screen and to the side, the Items to Add Sheet defaults to the Uninstalled line code view (compared to your existing system).

You can update descriptions in your file by selecting the "Description Changed" radio button, highlighting the item in question and selecting "Add Selected Item". Centrally managed fields will be updated including description, GL accounts and Group Codes.

Fields shown in blue on the left side of the screen (your system fields) cannot be changed, will be updated by the central server. Any un-shaded fields, such as pricing, commission, shop supplies etc. can be adjusted to meet your individual requirements.

To see all approved line codes, select the All Items radio button on the right. Those items highlighted in yellow will already be in your existing system, those highlighted in Pink are in your system but with a different description. To add any other to your system, simply click to highlight and press "Add Selected Item".
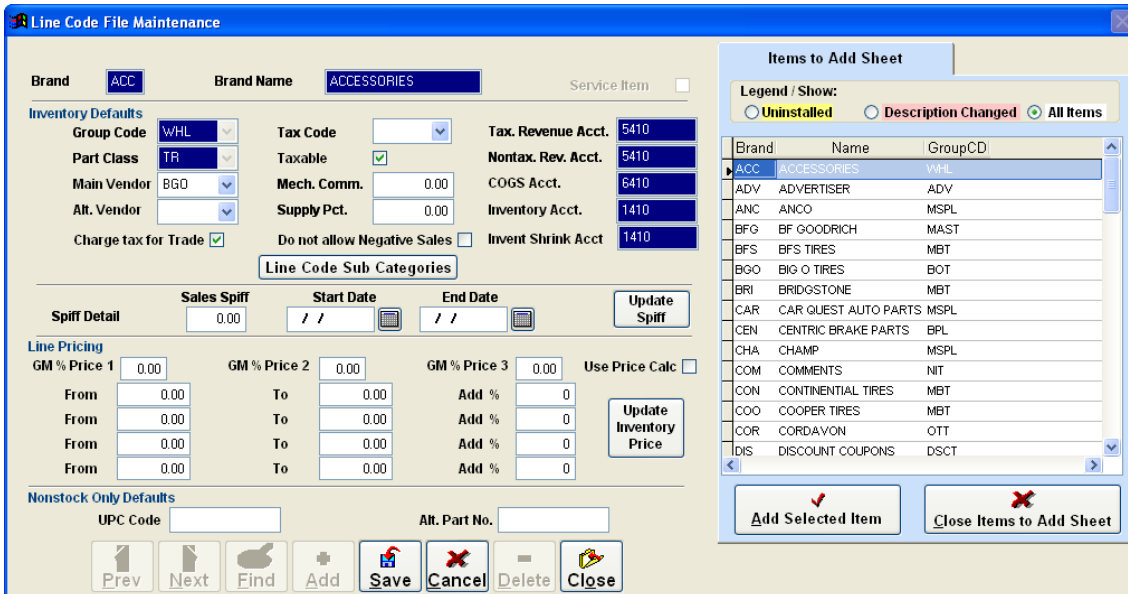
Your line codes are up to date if there are no uninstalled line codes and there are no description changes pending. When you click Add you will see the following dialog box:
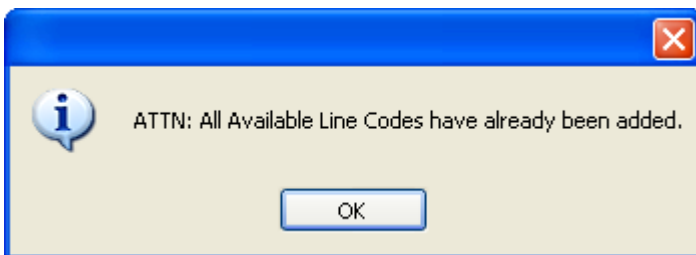
When new line codes or descriptions are available the Line Code Maintenance screen will be available again.

Service Items

Go to Inventory >Maintenance>Service Items– as with line codes, service items may only be added to your system through the centrally managed server.

To view all service items, select the "All Items" radio button. Those in your system currently are shown in Yellow, those in your system but with different descriptions are shown in Pink. To add to your system, highlight the desired item/description change and select "Add Selected Item".

Fields shown in blue will be updated from central server; non-shaded items can be adjusted based on your individual requirements.

To view only those items managed on the central server but NOT in your system, select the "Missing Items" radio button. To add these to your system, highlight the desired Service Item and press "Add Selected Items". You will then be able to adjust the pricing, commission etc. (non-shaded) fields to meet your individual requirements).

To view those items that are currently in your system but having different descriptions, select the "Description Changed" radio button. To update any item in your system, highlight the item to be changed and select "Add Selected Item". Only the description will be updated.

Tire Adjustments/Warranties

The tire adjustment process has changed with the removal of the 'Zero the Cost' option. This was done to preserve the true GP% at the end of the day and allow the adjustment cost to be posted into accounting correctly.

To learn more about this process go to http://www.vitech-net.com/TireAdjustments.pdf

Tire adjustment print out that is used for adjustments returned to the warehouse has been modified to show the reference number at the top of the report rather than each detail line and the claim number now located on each detail line. The Shop name and address is now in the lower left corner next to the signatures

POS Menu

There are the new enhancements in version 8.8:

Column Sorting on Main Menu Repair Screen
The Salesman Column and the Promised Time now sorts and sorts correctly.

Edit Pay
Previously if anyone attempted to open this process and the button was password protected, the password box would pop up and if you entered a non-authorized user, you would see the message that you didn't have access. However, you would still be able to get in and this has been corrected.

In addition the Edit Pay function used to allow you to change Cash pay to NATL account can no longer be done.

Mechanic/Installer Selection

This field used to allow no value; anything could be entered regardless of whether it was a real employee. This has been changed and requires the selection of a mechanic/installer on each invoice.
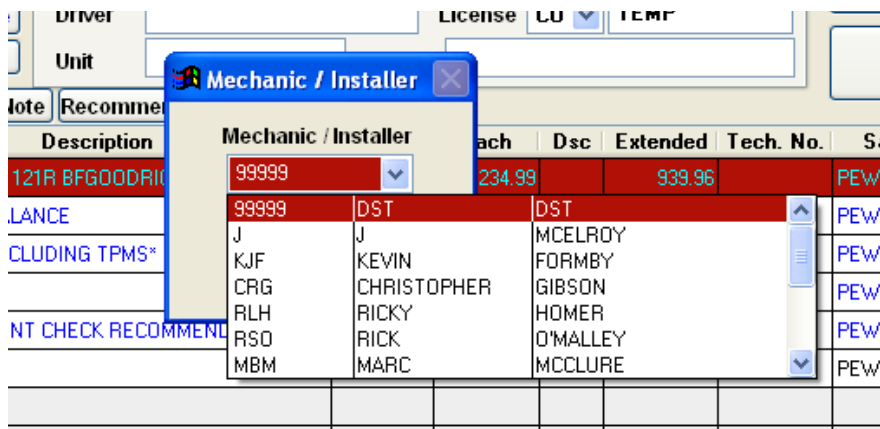
Quote Screen
The salesman who created a quote will now be saved on that quote with a column added to the quote screen to reflect the originator of the quote.

Negative Sales

A control has been added that will require that items sold negative be received or adjusted before a ticket can invoiced. This is a selective feature and can be enabled or disabled by Navex depending on the dealers preferences. If enabled it will be global to all product sold by the dealer.
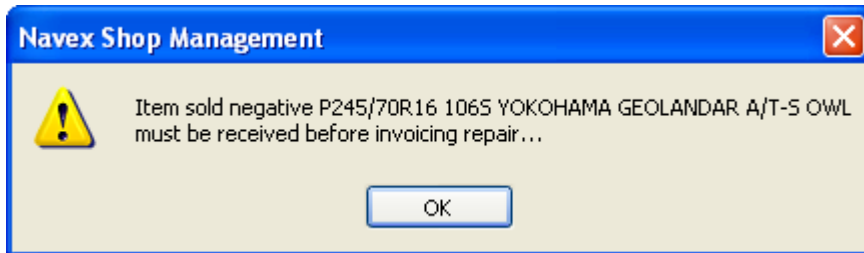
Outside Purchase
The Add Button had been changed to "Add Item to Return", and a tool tip will appear when you mouse over for easier understanding.

Cost Updating from Average
The unit cost and extended cost are now updated for stocking items with the current average cost after receiving items at a cost different than currently reflected in the inventory master.

In the example shown above, this invoice was generated with a higher average cost for this battery shown in the Inventory Master screen. Receiving w/o a PO at a lower cost, (because on hand was negative and had to receive before closing invoice) and then closing the invoice updated the Unit Cost and Extended Cost fields, reflected when you go back into the invoiced order and look at the details button.

Deleted Received Outside Purchases

Once Outside Purchase Parts have already been received into the system through the OP screen, and then are deleted from the ticket, they are automatically sent to the Return File without asking in advance, preventing parts from remaining in limbo.

Invoice History
When accessing customer history from the body of a repair order then after closing the history screen and immediately clicking the tire button to add a tire had caused errors. This has been fixed.

Forms
The font size has been reduced on estimates, work orders and invoices to allow more characters to fit into the part number, description field.

System Maintenance

AP Voucher/Petty Cash

In System Maintenance, the user must select either Petty Cash or AP Voucher, both cannot be selected now.

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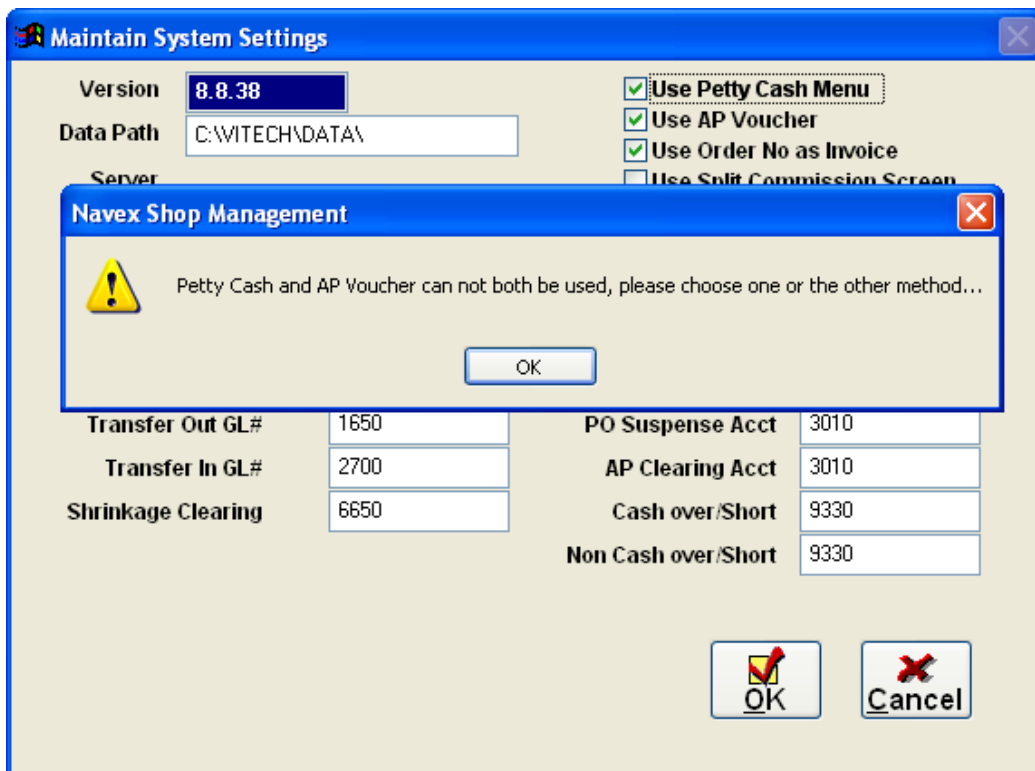
Inventory Management

Purchase Order Screen

Added color coded items to reflect orders already electronically submitted
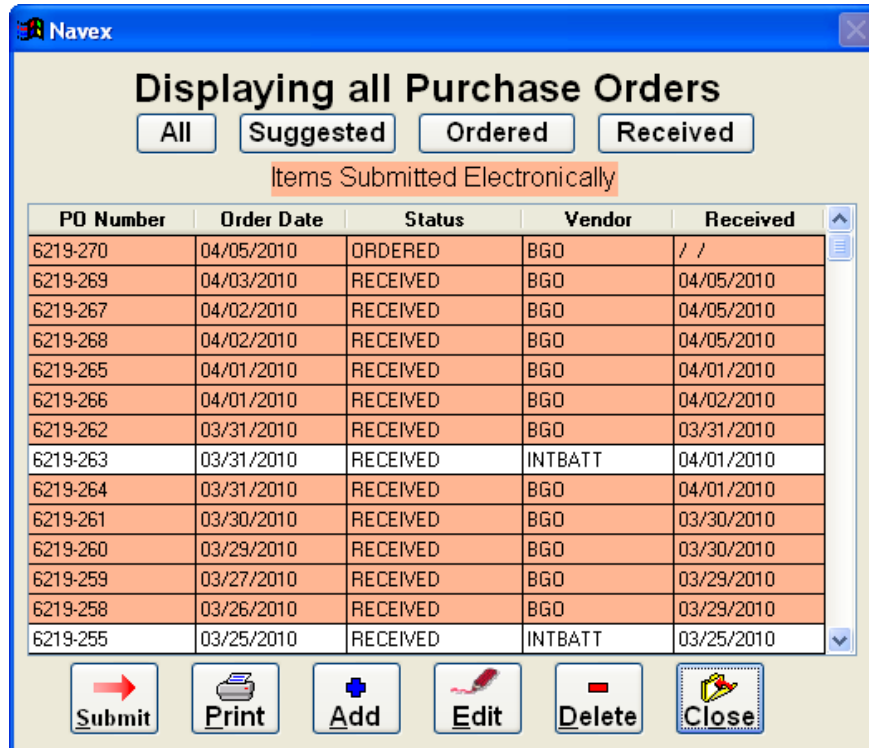
Adding Items to Suggested Orders
Previously when editing a suggested order then choosing "Post and Order", items edited or added were being discarded. This has been fixed to save all changes and additions prior to posting.

Purchase Order Deletion
An error that occurred when creating a Suggested Order and immediately attempted to delete that same order has been fixed.

Bolt Patterns
When entering new Inventory items and selecting the bolt pattern button, the list did not sort correctly. This has been corrected.

Price Updates

The Vendor and PR Class will now be downloaded from the line file.

The Price Update tool which allows you to download pricing and add items directly from the Big O Extranet site has also been revised. The new screen has two new columns called "sublines" and "pop codes".

The ability to filter by Pop Code has also been added. Use the dropdown arrow to sort the file by the desired pop code to determine which items to add to your local inventory.

Checking multiple items to add to your inventory will bring up the Add Checked Parts to Inventory button. Selecting this button will automatically add all items to your inventory and will fully complete all the required fields in the inventory record, as the example below shows.

Choosing to add a Single Part to Inventory will bring up the Add Parts Screen, filling in the required fields automatically with the correct Group Codes and GL Accounts.
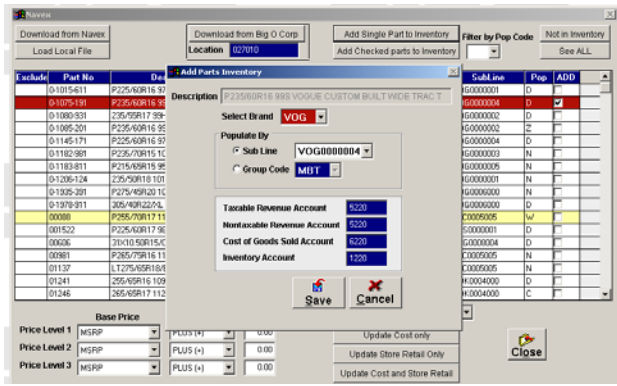
Adding Non-Big O Inventory Parts

To add non-Big O parts into the system you will go into the Inventory section from the Main Menu by selecting **Inventory or Alt+2**. Once in the inventory section select **Parts Inventory or Alt+2**, which will take you to the **Part Number Lookup** screen.

Clicking either the **OK** or the **Close** Icons will bring you to the **Parts Inventory Screen**, where you can add parts.
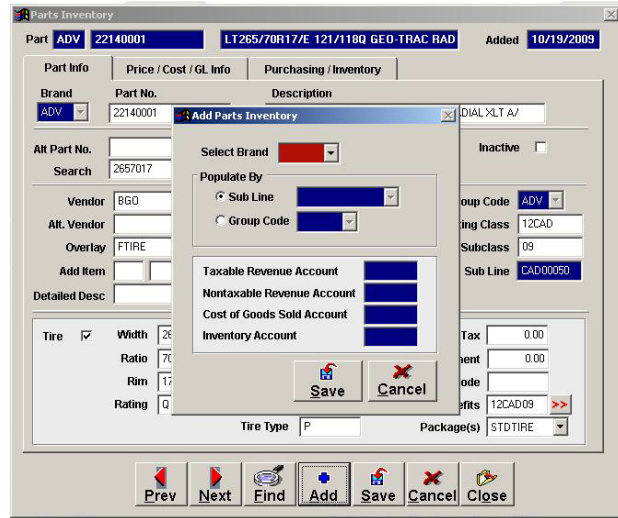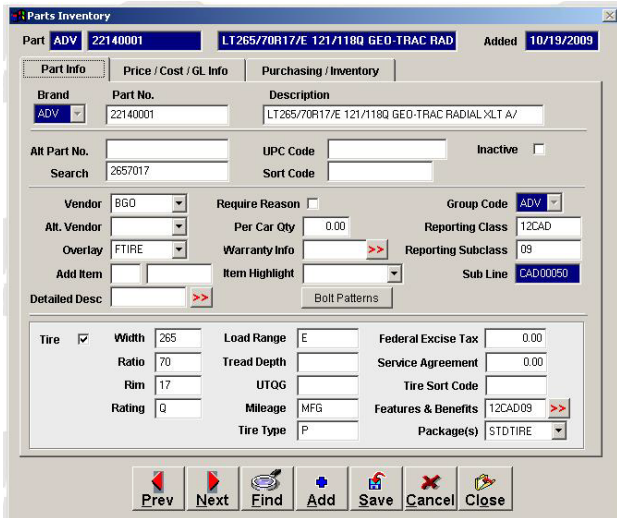
In order to add a part click the **Add** icon located at the bottom of the window in between the Find and the Save icons. This will bring up an additional new window entitled **Add Parts Inventory**.
This is the tool used to add non-Big o parts into the system. There are three different scenarios that could occur while using this tool and this will cover all three.

Using BFG as an example – to add a part first you must select the brand from the first drop down
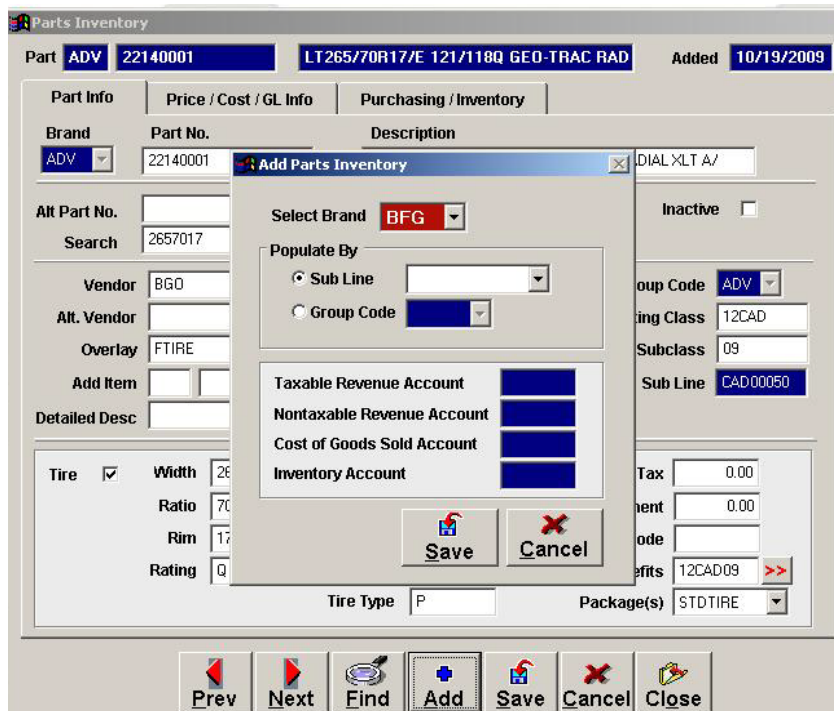
Here we have selected BFG. The next step is to select a sub line from the dropdown menu provided.
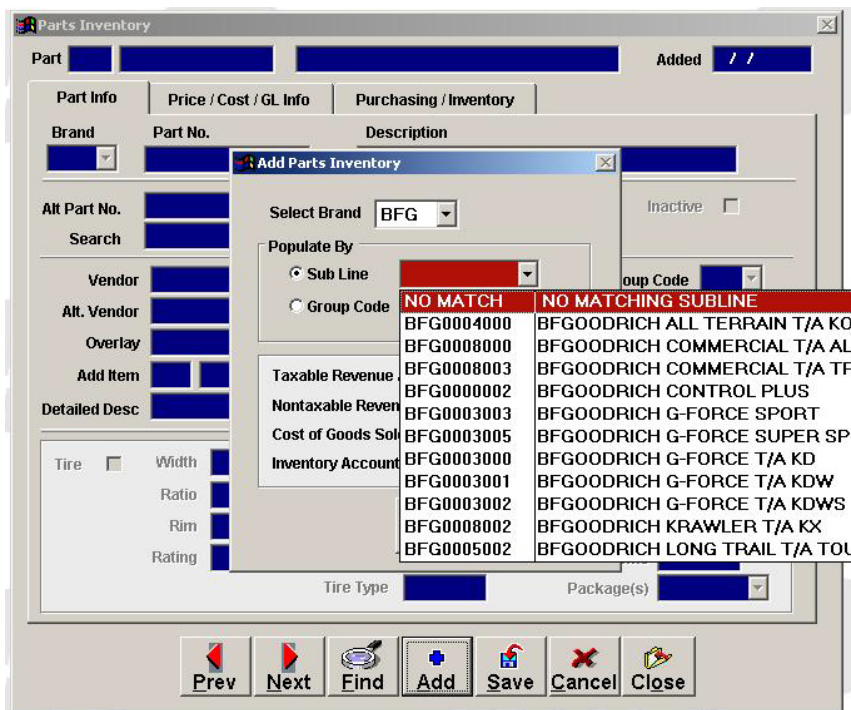
The first two scenarios that will be covered will be if A. there is no matching sub line for the product, and B. the product has no sub line. The procedure for either is the same. You would select NO MATCH from the drop down menu.
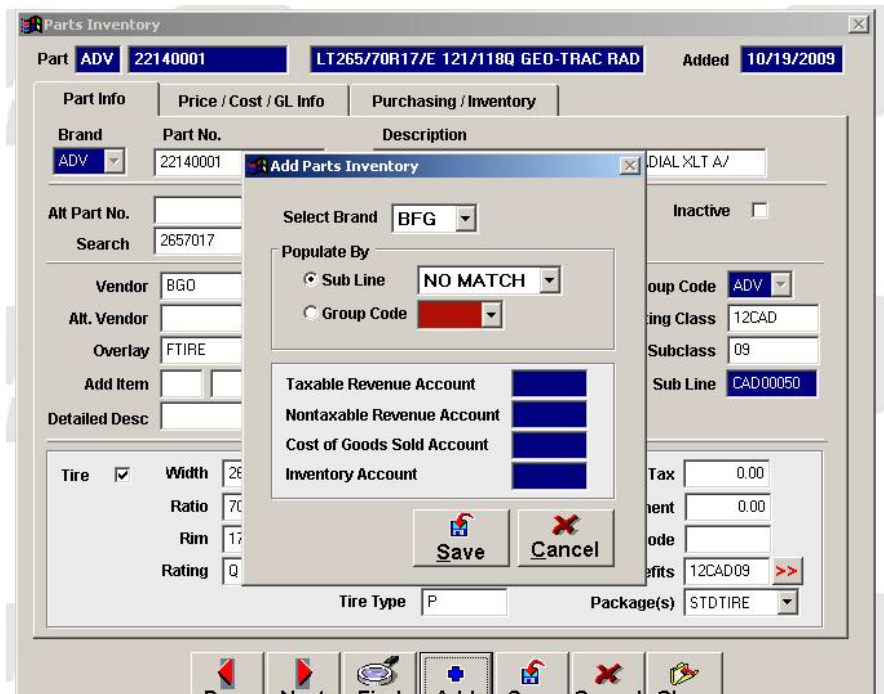
Next you will need to select a group code from the group code drop down menu.
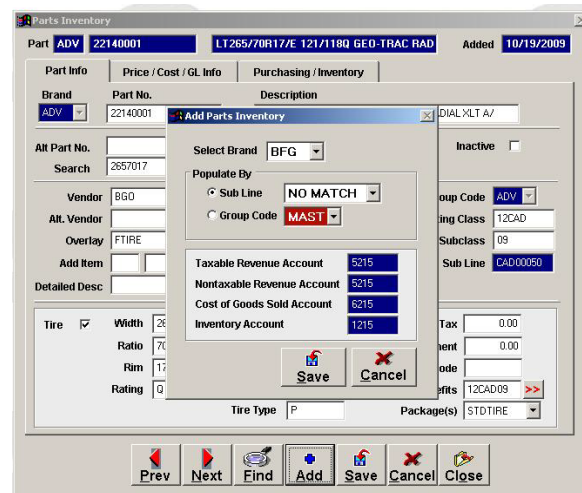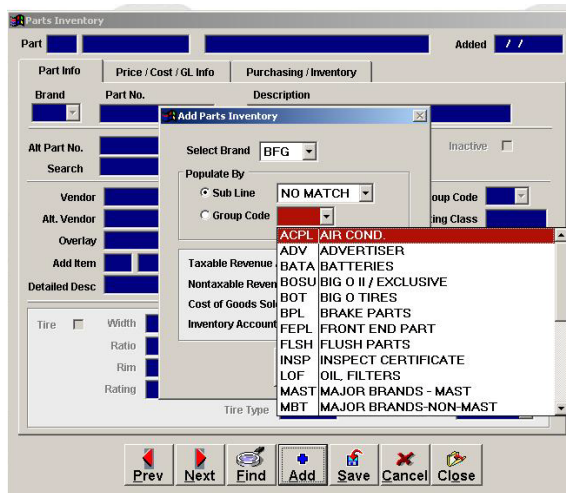
Once the group code is selected, the account codes are automatically generated and **cannot** be changed. Clicking the save icon will take you to the Parts Inventory window where you will add the part. All of the codes and account information will carry over to this screen, and **cannot** be changed. Once all of the part information has been entered click the Save icon, and the part has been added to the system.

The third scenario follows the same steps as described earlier. However, in this case there <u>will</u> be a matching sub line. When this sub line is selected, the rest of the information in the window – including group code – will automatically generate. The steps beyond this window for adding the part will remain the same as above.

Parts Return

In the background tables, we've added the Inventory Account field to parts returns. This will benefit the integrated accounting users.

End of Day

Petty Cash/AP Vouchers

If APV is turned on, the Petty Cash Button will not be visible

Corporate Charge/National Account Values

These items are now locked and can no longer be edited at EOD. If values are wrong they will need to be corrected through the repair order screen.

AP Vouchers/Accounting

TIAB Posting
Changed to use Post Day instead of begin and end date.

ROA
The ROA accounting posting date now sequences to the next calendar date.   Fixed bug on the ROA report which left off unapplied credits.

AP Vouchers
When processing AP Vouchers it was possible to change the pre-populated GL or AP Voucher entries. You can now change the description of those entries but will not be able to change the entry code or amounts. You can still add additional AP voucher codes.

Customer Maintenance

Charge Customers
If a customer is set up to Charge, record cannot be saved unless valid terms are selected. The "OK to Charge" function now defaults to no.
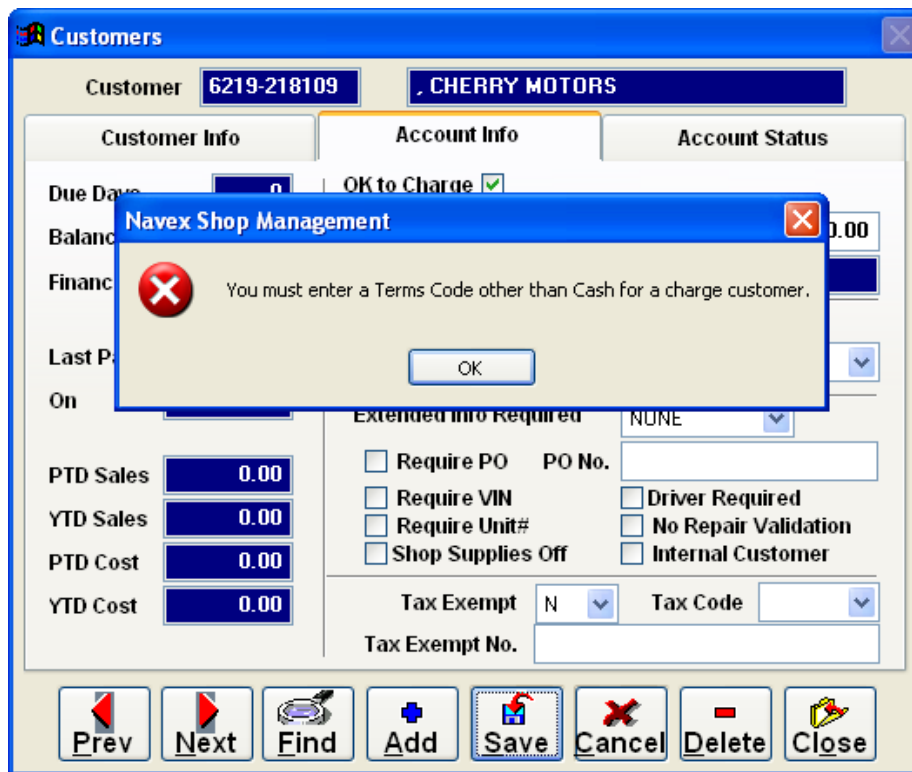
Navex Central Files Downloader

The Central File downloader is a service that is installed separately from POS that communicates with the Navex Central Server to download the latest GL account numbers, sub-category files, line files, group codes, master codes, service items, and features and benefits.

Standardized DOT Numbers

The requirement to use DOT numbers will now automatically be set when adding tires from Price Update. For existing tires in inventory or adding tires manually, if the overlay is set to 'FTIRE' and saved, it cannot be changed to another value. All non-tire parts will not be affected by this change.

Updated Report Menu

The Report Menu has been enhanced so that it expands the view of the available reports listed for quicker access and better visibility. In the past when a report was opened and closed it would close the Report Menu. Now when a report is opened and closed the report will now return to the Report Menu listing screen.
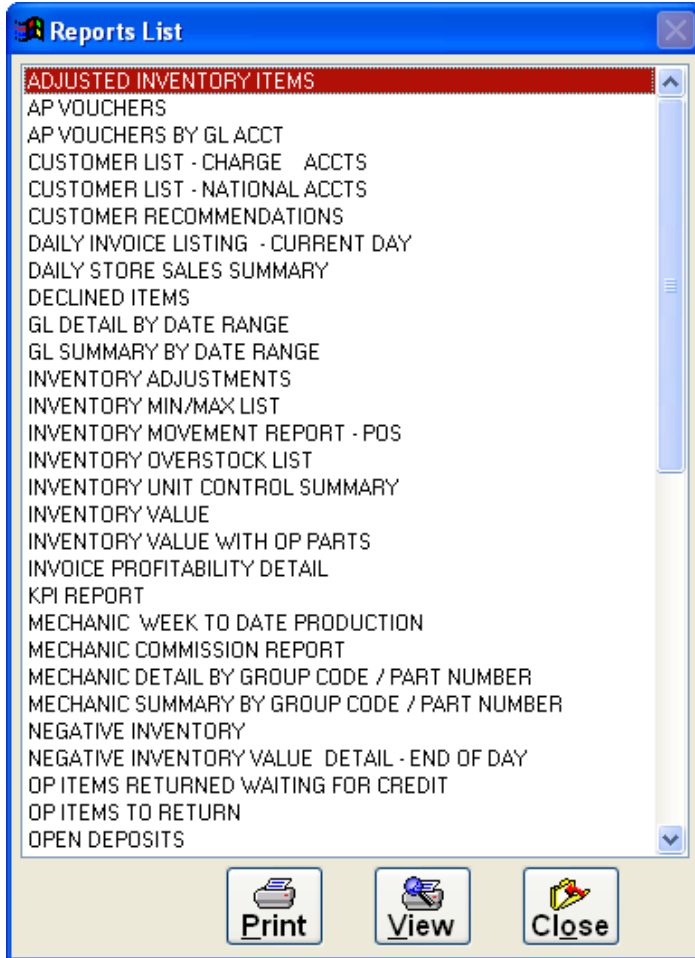
After Hours Updates

Two changes have been made when logging in after hours:

- End of Day Process is disabled
- AP Voucher creation is disabled
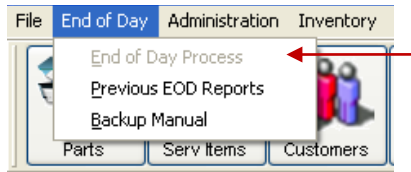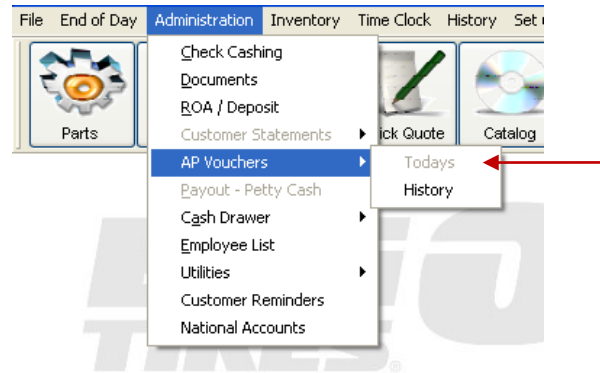
End of Day Backup

In the past when there was no backup path specified the system would still let you run end of day process. This would create a point of failure if data recovery was required. Now the system will still prompt you that a backup path is missing or is not valid, but if you proceed to continue without a backup path the system will automatically create a 'posback' folder under the C drive as a backup point.
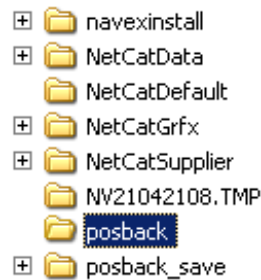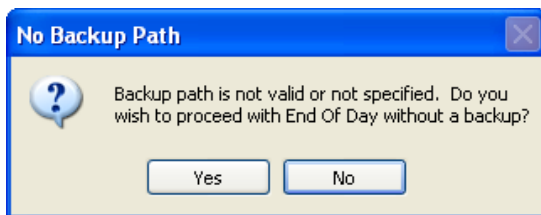
Updated Inventory Value w/ OP Parts Report

The Inventory Value Report with OP Parts has been updated so when you choose to view GL Summary data, it will break down inventory on hand, Outside Purchases received but not invoiced, and removed off of a ticket waiting to be returned or waiting for credit.

End of Day Inventory Value

Run at 04/20/2010 01:55:17 PM

Close of Business: 04/17/2010

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GL Account	On hand Qty	FET	Extended Repl Cost	Extended Avg Cost
1215 - INVENTORY-MAJOR BRANDS - MAST				
Inventory Items	103.00		14,679.45	14,633.91
Outside Purchase Items	8.00		803.44	803.44
1215 - INVENTORY-MAJOR BRANDS - MAST	111.00		15,482.89	15,437.35
1220 - INVENTORY-MAJOR BRANDS-NON-MAST				
Inventory Items	206.00		20,374.30	20,264.87
Outside Purchase Items	16.00		1,275.07	1,275.07
Returned Waiting for Credit	4.00		724.00	724.00
Items to be Returned	4.00		416.00	416.00
1220 - INVENTORY-MAJOR BRANDS-NON-MAST	230.00		22,789.37	22,679.94
1240 - INVENTORY- BIG O TIRES				
Inventory Items	634.00		57,018.32	57,082.36
Outside Purchase Items	5.00		727.34	727.34
1240 - INVENTORY- BIG O TIRES	639.00		57,745.66	57,809.70
1250 - INVENTORY-BIG O II / EXCLUSIVE				
Inventory Items	394.00		24,577.27	24,531.26
1310 - INVENTORY-OTHER NEW TIRES				
Inventory Items	117.00		5,990.88	6,012.96
Outside Purchase Items	8.00		1,175.03	1,175.03
Returned Waiting for Credit	2.00		149.82	149.82
1310 - INVENTORY-OTHER NEW TIRES	127.00		7,315.73	7,337.81
1320 - INVENTORY - SNOW TIRES				
Inventory Items	152.00		9,204.79	9,175.71

Updated Sales Summary w/ Inventory Variance

The Sales Summary report has been updated to include inventory variances at the bottom of the report displaying the total in dollars.

To learn more about this report go to http://www.vitech-net.com/InventoryVariance.pdf

Sales Summary

Run at 08/24/2010 03:26:02 PM
Page 1

Selected Date: 08/24/2010

Sales Group	Parts Quantity	Parts Amount	Labor Quantity	Labor Amount	Gross Profit %	Gross Profit Dollars	Total Sales
BIG O II EXCLUSIVE TIRES	4.00	$319.96	0.00	$0.00	35.2%	$112.80	$319.96
Tires And Wheels Total:	**4.00**	**$319.96**	**0.00**	**$0.00**	**35.2%**	**$112.80**	**$319.96**
TIRE LABOR	0.00	$0.00	4.00	$60.00	100.0%	$60.00	$60.00
WARRANTIES	0.00	$0.00	4.00	$41.60	100.0%	$41.60	$41.60
Other Tire Dept Total:	**0.00**	**$0.00**	**8.00**	**$101.60**	**100.0%**	**$101.60**	**$101.60**
BRAKE PARTS & LABOR	1.00	$109.95	1.00	$60.00	77.4%	$131.69	$169.95
INSPECTION CERTIFICATE	0.00	$0.00	1.00	$0.00	0.0%	$0.00	$0.00
OIL CHANGE PARTS & LABOR	6.00	$20.95	1.00	$12.00	66.4%	$21.88	$32.95
SERVICE DISCOUNTS	0.00	$0.00	1.00	$-32.95	100.0%	$-32.95	$-32.95
Service Total:	**7.00**	**$130.90**	**4.00**	**$39.05**	**70.9%**	**$120.62**	**$169.95**
SHOP SUPPLIES	0.00	$16.24	0.00	$0.00	100.0%	$16.24	$16.24
Shop Supplies Total:	**0.00**	**$16.24**	**0.00**	**$0.00**	**100.0%**	**$16.24**	**$16.24**
Sales & Service Total:	**11.00**	**$467.10**	**12.00**	**$140.65**	**57.7%**	**$351.26**	**$607.75**
ENVIRONMENTAL FEES	0.00	$0.00	5.00	$14.00	100.0%	$14.00	$14.00
FET	0.00	$0.00	0.00	$0.00	0.0%	$0.00	$0.00
Fees Total:	**0.00**	**$0.00**	**5.00**	**$14.00**	**100.0%**	**$14.00**	**$14.00**
Inventory Variance Total:				**$-118.91**			
Sales, Service, & Fees Total	**11.00**	**$467.10**	**17.00**	**$154.65**	**77.8%**	**$484.17**	**$621.75**

TIRE TAX	$4.00
SALES TAX	$43.57
Taxes And Internal Sale Total:	**$47.57**

Centrally Managed Navex License Key

The Navex License Keys are now managed centrally from the Navex Central Server and users can download a new license key when needed. In the past this use to be a manual process which included Navex support. Now going to Administration>Utilities>Download License Key will update your system.
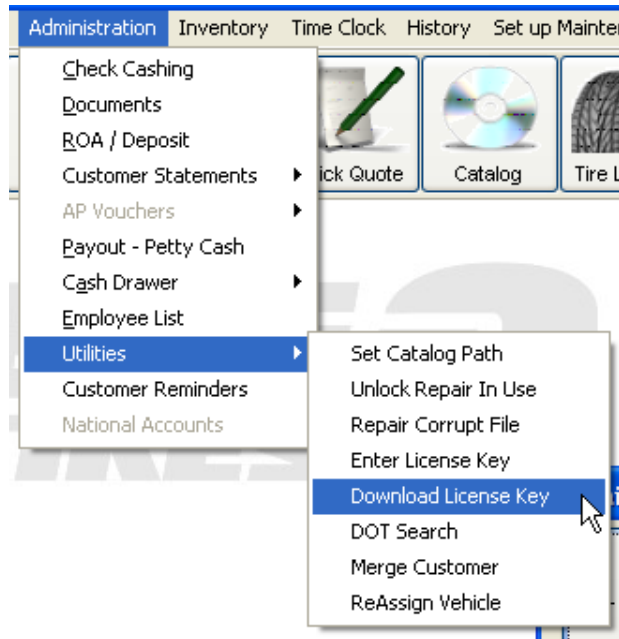
Version 8.7 – Initial Release January 2009

Independent Printer Support - NComputing

Users can now select different default printers on each NComputing system when setting up printing for POS. This will eliminate the need to choose a printer from the drop down list when printing estimates, work orders, and reports.

New Reports

There are five new reports that are adding to version 8.7:

- AP Vouchers by GL Account

  The AP Voucher by GL report displays AP Voucher details for a specified date range. The report is grouped by GL account, GL Description, and AP Voucher details summarizing the total for each account at the bottom.

- Customer List – Charge Accounts

  The Customer List – Charge Accounts report displays charges made to any corporate charge accounts. This report is a conditional report, meaning that it will only capture data from customer accounts setup as Charge account.

- Customer List – National Accounts

  The Customer List – National Accounts report displays active National accounts. This report is a conditional report, meaning that it will only capture data from customer accounts setup as National accounts

- Declined Items

  The Declined Items report displays parts and services declined by customers for a specified date range. The report provides details of the services and parts declined and are sorted by order number, invoice number, and date in ascending order.

- Inventory Overstock List

  The Inventory Overstock List report allows you to track which inventory items are becoming stale and not moving, or items that are overstocked and do not to be reordered.

Inventory Value Report – Includes OP Parts

A new inventory value report has been added in this version of POS. The Inventory Value W/OP Parts report now includes the outside purchase parts that have been received and is calculated into the total inventory value for the day.

SCB - SERV CENTRAL BATTERIES

24-65	AUTOMOTIVE GROUP SIZE 24 530 CCA	2.00	0.00	40.53	81.06	43.03	86.06
24F-65	AUTOMOTIVE GROUP SIZE 24F 530	1.00	0.00	40.53	40.53	40.53	40.53
27-85	AUTOMOTIVE GROUP SIZE 27 675 CCA	2.00	0.00	58.73	117.46	58.73	117.46
27F-85	AUTOMOTIVE GROUP SIZE 27F 710	1.00	0.00	58.73	58.73	58.73	58.73
34-75	AUTOMOTIVE GROUP SIZE 34 700 CCA	3.00	0.00	52.49	157.47	53.48	160.44
35-75	AUTOMOTIVE GROUP SIZE 35 570 CCA	3.00	0.00	48.85	146.55	49.10	147.30
47-85	AUTOMOTIVE GROUP SIZE 47 590 CCA	1.00	0.00	55.61	55.61	55.61	55.61
51-65	AUTOMOTIVE GROUP SIZE 51 425 CCA	2.00	0.00	43.13	86.26	43.13	86.26
58-75	AUTOMOTIVE GROUP SIZE 58 550 CCA	1.00	0.00	48.85	48.85	48.85	48.85
58R-75	AUTOMOTIVE GROUP SIZE 58R 610	2.00	0.00	53.53	107.06	53.53	107.06
65-85	AUTOMOTIVE GROUP SIZE 65 850 CCA	1.00	0.00	64.97	64.97	64.97	64.97
75DT-75	AUTOMOTIVE GROUP SIZE 35/75DT	1.00	0.00	52.49	52.49	57.49	57.49
75DT-85	AUTOMOTIVE GROUP SIZE 35/75DT	3.00	0.00	56.13	168.39	56.13	168.39
78-75	AUTOMOTIVE GROUP SIZE 78 700 CCA	1.00	0.00	54.05	54.05	64.05	64.05
SCB - SERV CENTRAL BATTERIES TOTAL:		**24.00**	**0.00**		**1,239.48**		**1,263.20**

SHK -

71678	RF STRUT ONESTOP 71678 (OP Recd:	1.00	0.00	77.63	77.63	77.63	77.63
71679	LF STRUT ONESTOP 71679 (OP Recd:	1.00	0.00	77.63	77.63	77.63	77.63
71680	RR STRUT ONESTOP 71680 (OP Recd:	1.00	0.00	62.22	62.22	62.22	62.22
71681	LR STRUT ONESTOP 71681 (OP Recd:	1.00	0.00	62.22	62.22	62.22	62.22
72101		1.00	0.00	99.51	99.51	99.51	99.51
72102		1.00	0.00	99.51	99.51	99.51	99.51
SHK - TOTAL:		**6.00**	**0.00**		**478.72**		**478.72**

Security Enhancement

The POS security has been modified to allow for more specific control over POS functions and access throughout the system. In order to prevent unauthorized access or changes to the security settings, the screen has been password protected.

Credit Status Option

You can now check a customer's credit status in the ROA/Deposit screen without having to go into the Customer Statements screen. This feature is only available to systems that are integrated with QuickBooks.

After Hours Login

The After Hours Login checkbox is now available after running the end of day process. Checking this box will allow you to login to the system without starting a new day. Once in the system most of functionality in POS is read-only and any data modification is disabled.
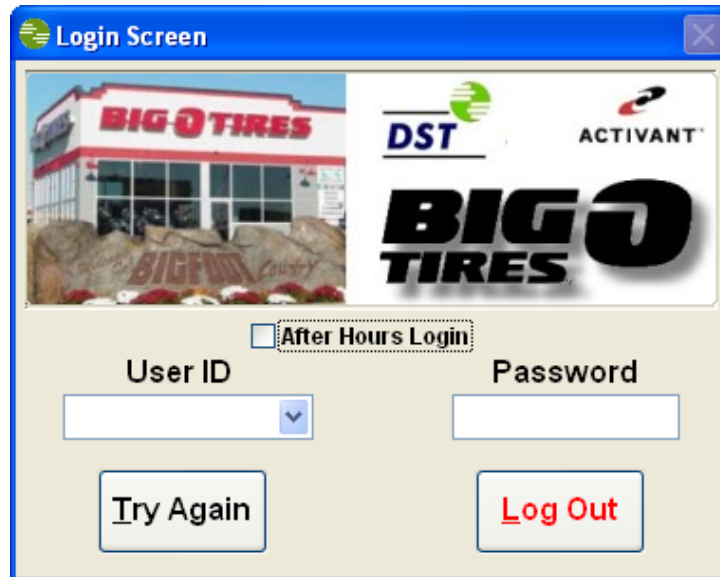
Zero Amount AP Voucher

AP vouchers are used to adjust accounting entries for purchases that have been posted. AP vouchers can now be zero-amount. Prior to creating the AP voucher, you must know what voucher you are correcting, the dollar amount, and details of the AP Voucher.
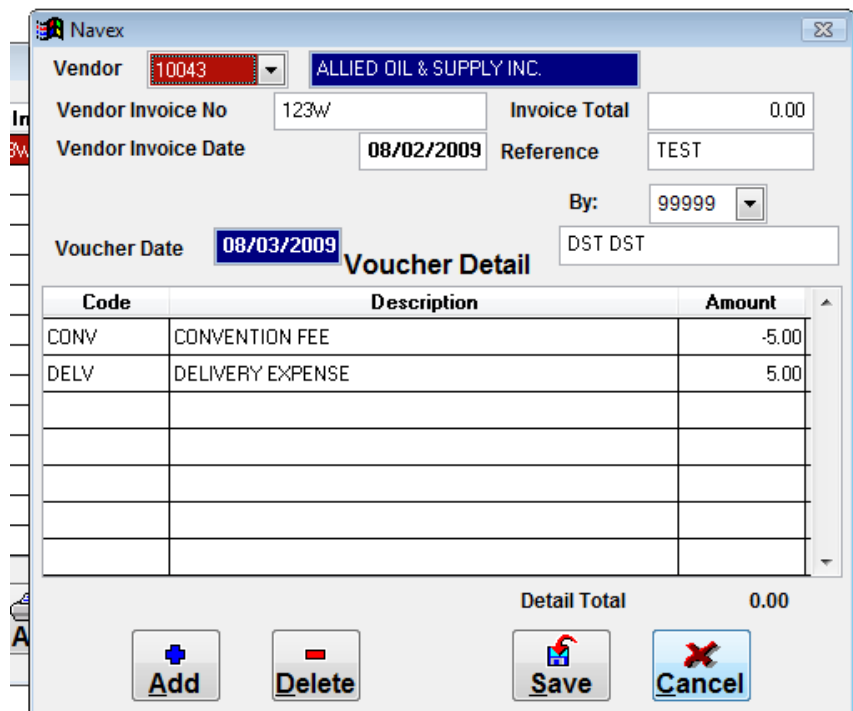
QuickBooks Batch Check

To prevent batches from being posted more than once to QuickBooks, a warning will inform you that the batch has been already posted for that day. This feature is now included in **Daily Deposit Posting, AR Posting, ROA Posting,** and **AP Posting** under the QuickBooks Link.
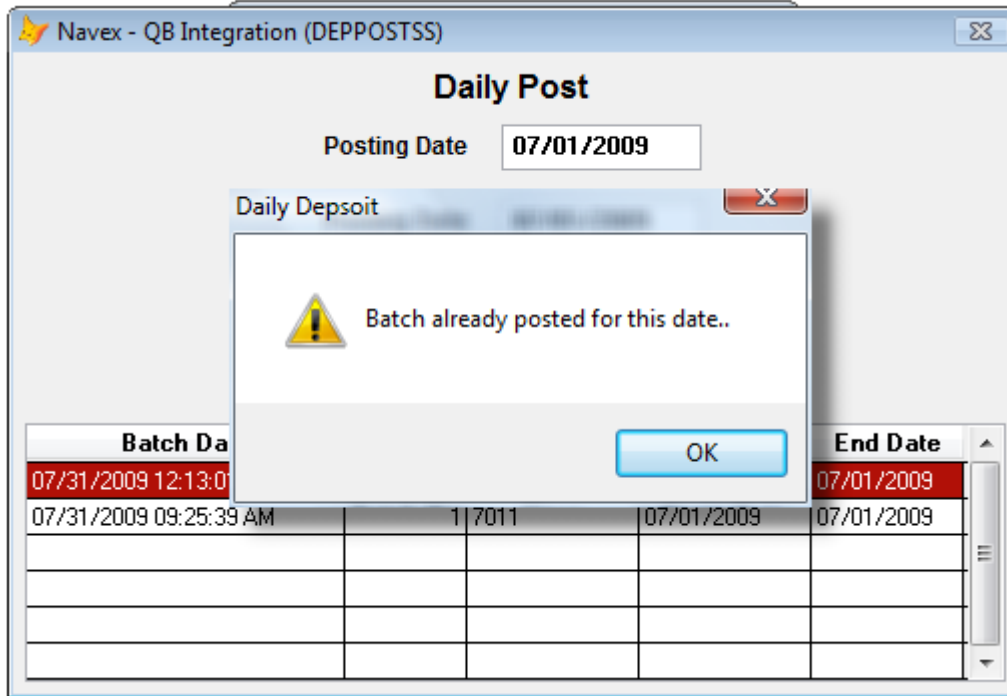
Lockdown Maintenance

In this version of POS some maintenance options have been locked down in the anticipation of code standardization:

- From the Main Menu under Inventory the **Master Codes** and **Group Codes** are grayed out.
- Under Set up Maintenance the **General Ledger** is also grayed out.
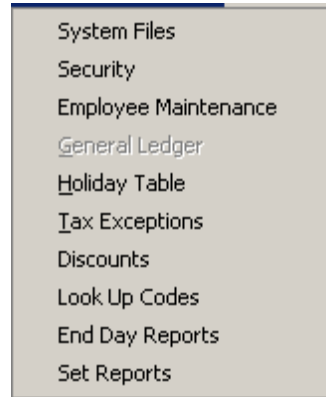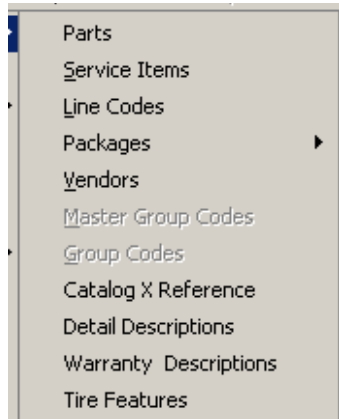
- From the Main Menu under **Set up Maintenance>Look Up Codes** the AP Vouchers and Payment Options cannot be added, edited, or deleted:
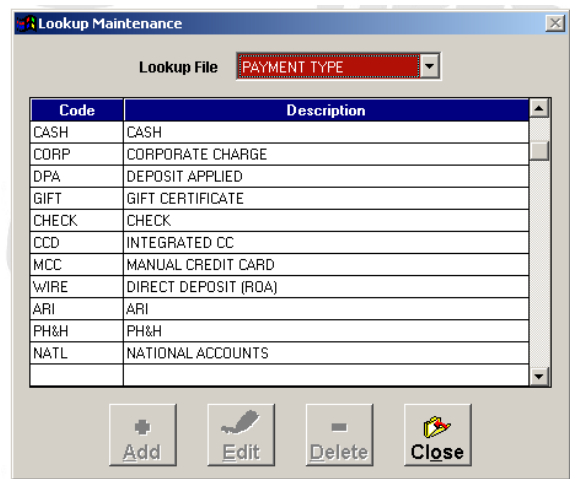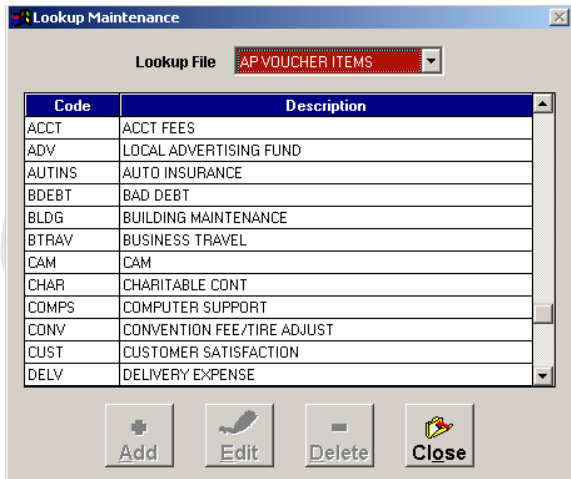
Product Received by Date Range - *New*

The Product Received by Date Range is a new report that has been designed to display the parts received as an outside purchase, parts received with a PO, and parts received without a PO. This report can run with a date range and shows PO information, Brand/Part number information, vendor, quantity, and costs.

Items Received

Run at 08/25/2009 08:50:10 AM
Page 1

Selected Date: 07/25/2009

	PO Number Vendor Inv#	Brand/Part Number	Vendor	Qty Received	Receive Cost	Extended Cost
Received 07/25/2009	**Rec Type** OUTSIDE PURCHASE					
	689941	CEN 11105990	OS	1.00	17.42	17.42
	689941	CEN 11761024	OS	1.00	7.44	7.44
	689941	CEN 12161049	OS	2.00	27.03	54.06
	689941	CEN LCD598	OS	1.00	25.95	25.95
	6901-14105	OPP OPMSP	SWAUTO	1.00	4.30	4.30
	OUTSIDE PURCHASE TOTALS			6.00		109.17
Received 07/25/2009	**Rec Type** REC W/O PO					
	689941-26	CEN 118.61006	OS	1.00	5.53	5.53
	689941-26	CHA AF1696	OS	1.00	5.75	5.75
	753029	ADV 22266001	MIHI	4.00	78.00	312.00
	REC W/O PO TOTALS			6.00		323.28
07/25/2009 TOTALS				12.00		432.45

Transfer Option Removed

In single store versions of POS the Transfer option is no longer available for in-coming and out-going transfers of inventory.
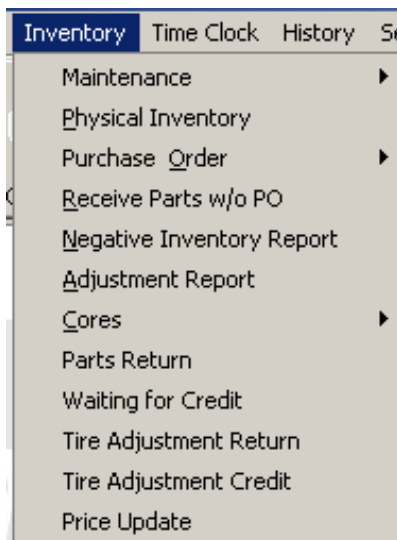
AP Voucher Payment Option

The AP Voucher **Pay With** option has been removed. Under the **Vendor** drop down the choice is either **Cash** or **Vendor** code. This will insure that the payments will post to the correct GL accounts without error:

Sales Tax Summary Report

The Sales Tax Summary report has been revamped to replace the Sales Tax Detail, Sales Tax Summary, and Sales Tax Worksheet.

Start of Business: 07/01/2009
Close of Business: 07/31/2009

Invoice Date	Gross Sales	NON Taxable Sales				Taxable Sales	Sales Tax Collected
		Internal Sales	Service Items	Tire Tax	Other		
07/01/2009	6,144.36	0.00	1,359.73	27.00	0.00	4,456.77	300.86
07/02/2009	4,755.36	0.00	909.92	22.50	45.94	3,538.18	238.82
07/03/2009	8,918.82	0.00	1,437.16	48.00	0.00	6,963.58	470.08
07/05/2009	2,242.09	0.00	153.64	18.00	0.00	1,939.50	130.95
07/06/2009	5,147.47	0.00	1,403.86	19.50	0.00	3,488.64	235.47
07/07/2009	4,012.80	0.00	1,126.59	12.00	0.00	2,692.45	181.76
07/08/2009	7,642.28	0.00	1,984.21	21.00	0.00	5,280.63	356.44
07/09/2009	7,213.77	0.00	1,271.99	57.00	25.69	5,488.57	370.52
07/10/2009	5,566.93	0.00	1,350.81	27.00	23.99	3,901.75	263.38
07/11/2009	8,431.46	0.00	779.14	24.00	0.00	7,145.94	482.38
07/12/2009	1,370.44	0.00	134.00	6.00	0.00	1,152.63	77.81
07/13/2009	3,959.73	0.00	693.95	27.00	0.00	3,033.96	204.82
07/14/2009	3,786.83	0.00	737.50	21.00	127.98	2,716.93	183.42
07/15/2009	7,858.05	0.00	1,658.26	43.50	0.00	5,766.96	389.33
07/16/2009	7,546.30	0.00	1,551.58	34.50	0.00	5,583.29	376.93
07/17/2009	5,247.11	0.00	460.89	28.50	0.00	4,456.86	300.86
07/18/2009	3,204.10	0.00	809.32	9.00	0.00	2,234.90	150.88
07/19/2009	851.02	0.00	222.50	3.00	0.00	585.96	39.56
07/20/2009	4,662.86	0.00	1,364.42	18.00	0.00	3,073.00	207.44
07/21/2009	4,738.07	0.00	865.39	15.00	53.00	3,564.06	240.62
07/22/2009	4,710.54	0.00	1,369.23	12.00	23.99	3,096.29	209.03
Report Totals	108,010.39	0.00	21,644.09	493.50	300.59	80,160.85	5,411.36

Parts Lookup Enhancement

The Parts Lookup screen sequence has changed with the **Part Number Lookup** screen coming up first, defaulting to the Part No search field, followed by the Parts Inventory Maintenance screen opening second.

Sales Summary Enhancement

- Sales Summary Report now shows the Shop Supplies as separate line item in the report and is no longer part of the FEE Group Code. Shop Supplies now will be reported under the SS Group Code.
- Tire Tax, FET, and Internal Sales are now summarized at the bottom.
- Invoice count and Car Count are included on the last page of the Sales Summary report.

SHOP SUPPLIES	0.00	$64.54	0.00	$0.00	100.0%	$64.54	$64.54
Shop Supplies Total:	**0.00**	**$64.54**	**0.00**	**$0.00**	**100.0%**	**$64.54**	**$64.54**
Sales & Service Total:	**43.00**	**$2,467.19**	**35.30**	**$598.99**	**59.6%**	**$1,827.69**	**$3,066.18**
ENVIRONMENTAL FEES	0.00	$0.00	17.00	$38.00	100.0%	$38.00	$38.00
SERVICE	0.00	$0.00	1.00	$-15.00	100.0%	$-15.00	$-15.00
Fees Total:	**0.00**	**$0.00**	**18.00**	**$23.00**	**100.0%**	**$23.00**	**$23.00**
Sales, Service, & Fees Total	**43.00**	**$2,467.19**	**53.30**	**$621.99**	**59.9%**	**$1,850.69**	**$3,089.18**

TIRE TAX	$14.00
FET	$0.00
SALES TAX	$168.20
INTERNAL SALES	$686.00
Taxes And Internal Sale Total:	**$868.20**

Invoice Count	11
Car Count	8
Refund Count	0
Void Count	0
Refund Dollars	0.00
Average Invoice	344.47

Grand Total	**$3,957.38**

- The Daily Sales Summary report has been removed from the End of Day Menu and moved into the Reports Menu

> End of Day Process
> Previous EOD Reports
> Backup Manual

Inventory Value Report - EOD

The End of Day reports now includes the Inventory Value Summary report.
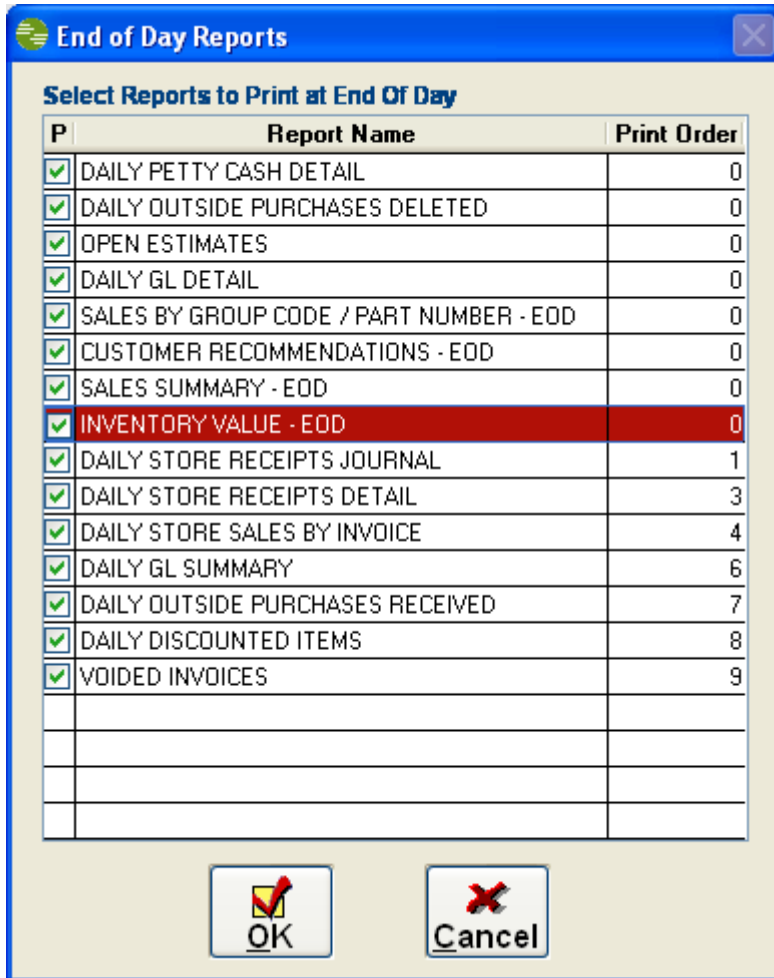
Inventory Value Report - *New*

The Inventory Value report has been redesigned using a report selector that allows you to choose On Hand Date, group by Brand or GL Account Code. The report can be run in summary and detailed mode. The report is used to track activity and cost changes in the inventory.

Sales Tax Summary Report - *New*

The Sales Tax Summary report is a new report that is based on the total invoice gross sales. The report shows the total for each type of sales tax charged, including non-taxable, taxable, and sales tax collected.

Sales Tax WorkSheet

Run at 08/21/2009 03:30:02 PM

Page 1

Start of Business: 07/01/2009
Close of Business: 07/01/2009

Invoice Date	Gross Sales	Internal Sales	Service Items	Tire Tax	Other	Taxable Sales	Sales Tax Collected
			NON Taxable Sales				
07/01/2009	6,144.36	0.00	1,359.73	27.00	0.00	4,456.77	300.86
Report Totals	6,144.36	0.00	1,359.73	27.00	0.00	4,456.77	300.86

Sales by Group Code/Part Number Report - *New*

The Sales Detail by Group Code/Part Number report has been redesigned to display the profit by part number and then profit by group code. This report is sorted by Master Code, then Group Code, and then part number.

Sales Detail by Group Code / Part Number

Run at 07/12/2009 07:17:07 PM
Page 2

Selected Date Range: 07/12/2009 to 07/12/2009

		Qty	Ext. Cost	Ext. Sale	Avg. Sale	Gross Profit	Profit Margin
OIL CHANGE PARTS & LABORTotal:		8.00	14.09	34.99	4.37	20.90	59.7%
Group: SHOCKS /STRUTS & LABOR							
OPP OPSS	SHOCKS	4.00	70.72	243.96	60.99	173.24	71.0%
SHOCKS /STRUTS & LABORTotal:		4.00	70.72	243.96	60.99	173.24	71.0%
SERVICE Total:		14.00	84.81	408.93	29.21	324.12	79.3%

Master Group: SHOP SUPPLIES		Qty	Ext. Cost	Ext. Sale	Avg. Sale	Gross Profit	Profit Margin
Group: SHOP SUPPLIES							
SHOP SUPPLIES		0.00	0.00	34.12	0.00	34.12	100.0%
SHOP SUPPLIESTotal:		0.00	0.00	34.12	0.00	34.12	100.0%
SHOP SUPPLIES Total:		0.00	0.00	34.12	0.00	34.12	100.0%
SALES & SERVICE Total:		48.00	724.81	1,654.78	34.47	929.97	56.2%

Master Group: FEES AND EXPENSES		Qty	Ext. Cost	Ext. Sale	Avg. Sale	Gross Profit	Profit Margin
Group: ENVIRONMENTAL FEES							
FEE FEEFD	FLUID DISPOSAL FEE	1.00	0.00	2.00	2.00	2.00	100.0%
ENVIRONMENTAL FEESTotal:		1.00	0.00	2.00	2.00	2.00	100.0%
Group: SERVICE DISCOUNTS/COUPONS							
DIS COUS	SERVICE COUPON	3.00	0.00	-50.00	-16.67	-50.00	100.0%
SERVICE DISCOUNTS/COUPONSTotal:		3.00	0.00	-50.00	-16.67	-50.00	100.0%
FEES AND EXPENSES Total:		4.00	0.00	-48.00	-12.00	-48.00	100.0%
FEES Total:		4.00	0.00	-48.00	-12.00	-48.00	100.0%

	Qty	Ext. Cost	Ext. Sale	Avg. Sale	Gross Profit	Profit Margin
Sales, Service, & Fees Total	52.00	724.81	1,606.78	30.90	881.97	54.9%

Master Group: TAXES AND INTERNAL SALES	Qty	Ext. Cost	Ext. Sale	Avg. Sale	Gross Profit	Profit Margin
TIRE TAX	10.00	0.00	10.00	1.00	10.00	100.0%
FET	0.00	0.00	0.00	0.00	0.00	0.0%
SALES TAX	9.00	0.00	98.42	10.94	98.42	100.0%
TAXES AND INTERNAL SALES Total:	19.00	0.00	108.42	5.71	108.42	100.0%

		Ext. Cost	Ext. Sale	Avg. Sale	Gross Profit	Profit Margin
REPORT TOTALS:		724.81	1,715.20	24.16	990.39	57.7%

Price Update Enhancement

With the new version of Navex POS selecting multiple parts in the Price update screen is now available. In addition, all items selected will be automatically added to the inventory master without the user having to input any additional information.

Note: If there is no Sub-Category defined it will not add tires to inventory

For single item addition, highlight the item to be added and then select the **Add Single Part to Inventory** button. To add multiple items, mark the checkbox in the far right hand column for the applicable items, then select **Add Checked parts to Inventory.**

Exclude	Part No	Description	New Cost	New MSRP	Old Cost	Old MSRP	Brand	ADD
	122-12	P245/60R15 100T BIG O SXP G/T OWL - REI	59.34	103.95	59.34	103.95	BGO	☐
	122-14	P255/60R15 102T BIG O SXP G/T OWL	71.35	116.95	71.35	116.95	BGO	☐
	122-16	P275/60R15 107T BIG O SXP G/T OWL	72.42	117.95	72.42	117.95	BGO	☐
	122-18	P215/65R15 95T BIG O SXP G/T OWL	61.58	101.95	61.58	101.95	BGO	☐
	122-30	P205/70R14 93T BIG O SXP G/T OWL	44.00	70.95	44.00	70.95	BGO	☐
	122-32	P215/70R14 96T BIG O SXP G/T OWL	60.72	98.95	60.72	98.95	BGO	☐
	122-34	P225/70R14 98T BIG O SXP G/T OWL	63.20	102.95	63.20	102.95	BGO	☐
	122-35	P215/70R15 97T BIG O SXP G/T OWL	62.01	100.95	62.01	100.95	BGO	☐
	122-36	P225/70R15 100T BIG O SXP G/T OWL	65.08	105.95	65.08	105.95	BGO	☐
	122-38	P235/70R15 102T BIG O SXP G/T OWL	66.53	104.95	66.53	104.95	BGO	☐
	122-40	P255/70R15 108T BIG O SXP G/T OWL	72.74	124.95	72.74	124.95	BGO	☐
	122307	235/65R18 106R BRIDGESTONE BLIZZAK D	127.83	0.00	0.00	0.00		☐
	1235911	205/55R16/XL 94H MARANGONI METEO HF	61.60	102.95	0.00	0.00		☑
	1235961	225/45R17/XL 94V MARANGONI METEO HP	77.62	110.95	0.00	0.00		☑
	12381	215/55R17 94V MICHELIN PILOT MXM4 BLK	128.00	209.95	0.00	0.00		☑
	12411	37X12.50R17/D 124R BFGOODRICH ALL TEI	209.00	317.95	209.00	317.95	BFG	☐
	1241551	205/65R15 94H MARANGONI METEO HP BL	35.00	52.95	0.00	0.00		☐

Buttons visible: Download from Navex | Load Local File | Download from Big O Corp | Location 006216 | Add Single Part to Inventory | Add Checked parts to Inventory | Not in Inventory | See ALL

	Base Price	Plus / Minus	Adjust %
Price Level 1	MSRP	PLUS (+)	0.00
Price Level 2	MSRP	PLUS (+)	0.00
Price Level 3	MSRP	PLUS (+)	0.00

Update Cost only
Update Store Retail Only
Update Cost and Store Retail
Close

Catalog Expiration Notice

When starting a new repair, you will be notified that your catalog license is about to expire with a notice similar to that below. To discontinue receiving this notice, update your catalog data using the Data Update Utility icon on your desktop and the CD/DVD provided by Activant.
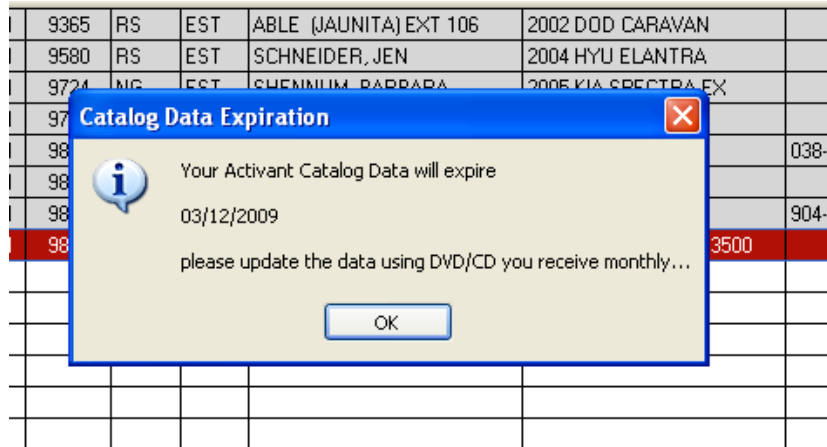
Existing Quote/Estimate

If you start a quote or estimate for a customer who already has one open in either of the applicable tabs on the main repair order screen, you will be prompted with the following notification. Highlight the desired estimate or quote if you want to continue to use those, or press Start New to create a new repair order.
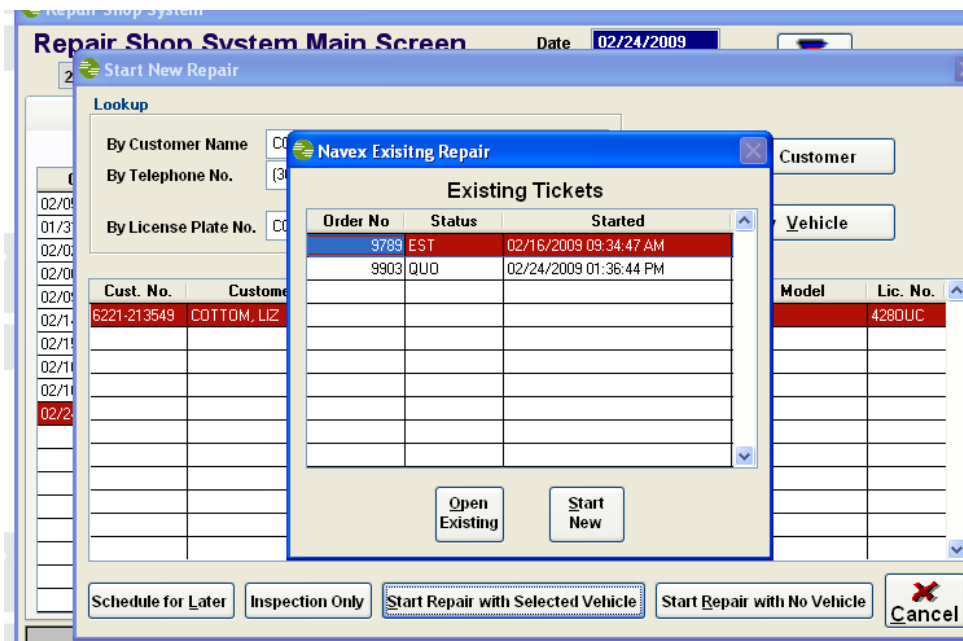
Torque and Air Pressure

The torque and tire air pressure will now print on every invoice without requiring that it be included in the packages. This will only appear for those vehicles where this information is available in the Activant catalog.


DOT Search

Now search for DOT numbers that have been sold and are being recalled. In the single store application, go to **Administration>Utilities>DOT Search**, in the Multi-branch application go to **Administration>DOT Search**. Enter the applicable DOT# and press find to view all applicable order numbers on the screen, or print for a written report. Use this information to search Invoice History if needed.
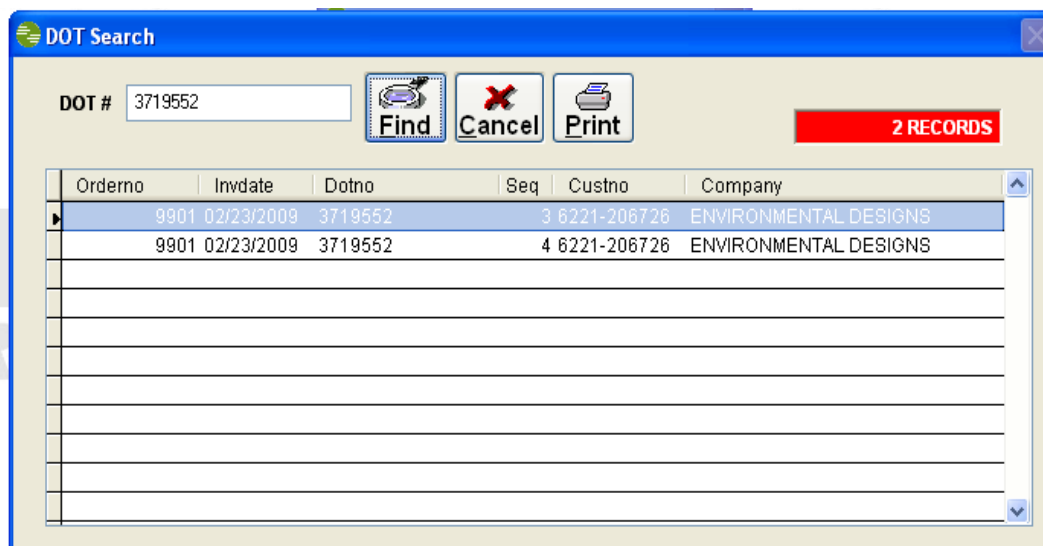
Inactive Vehicles

Make vehicles inactive in a customer record so it won't show up the next time you select that customer. From the **Main Menu** screen, go to **Customers>Vehicles** and find the customer where the vehicle is to be inactivated. Select the **Vehicles >>** option shown at the right portion of the main tab for that customer**.**
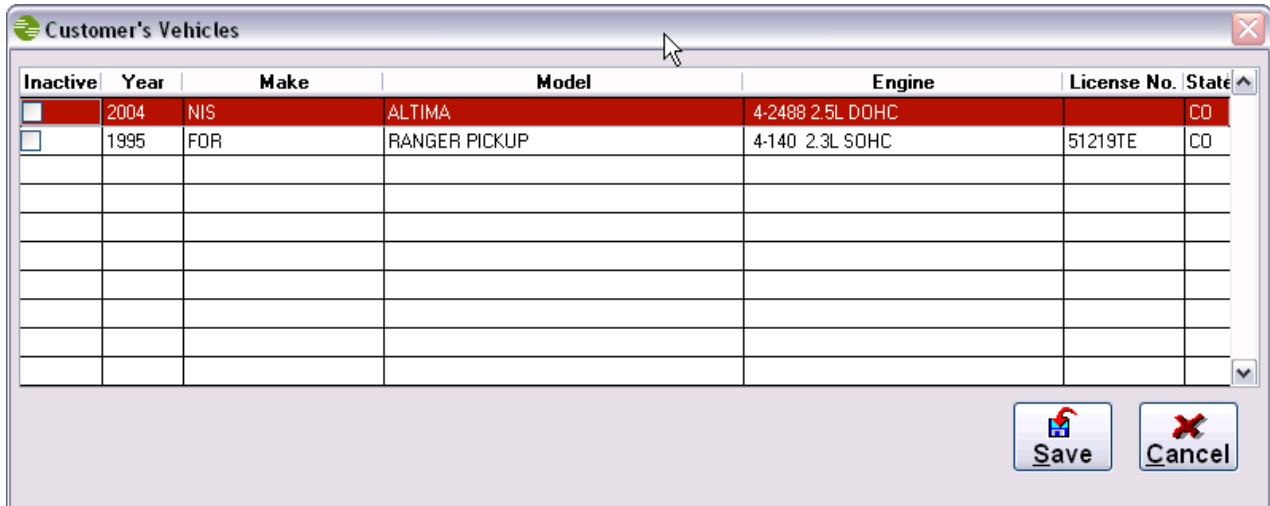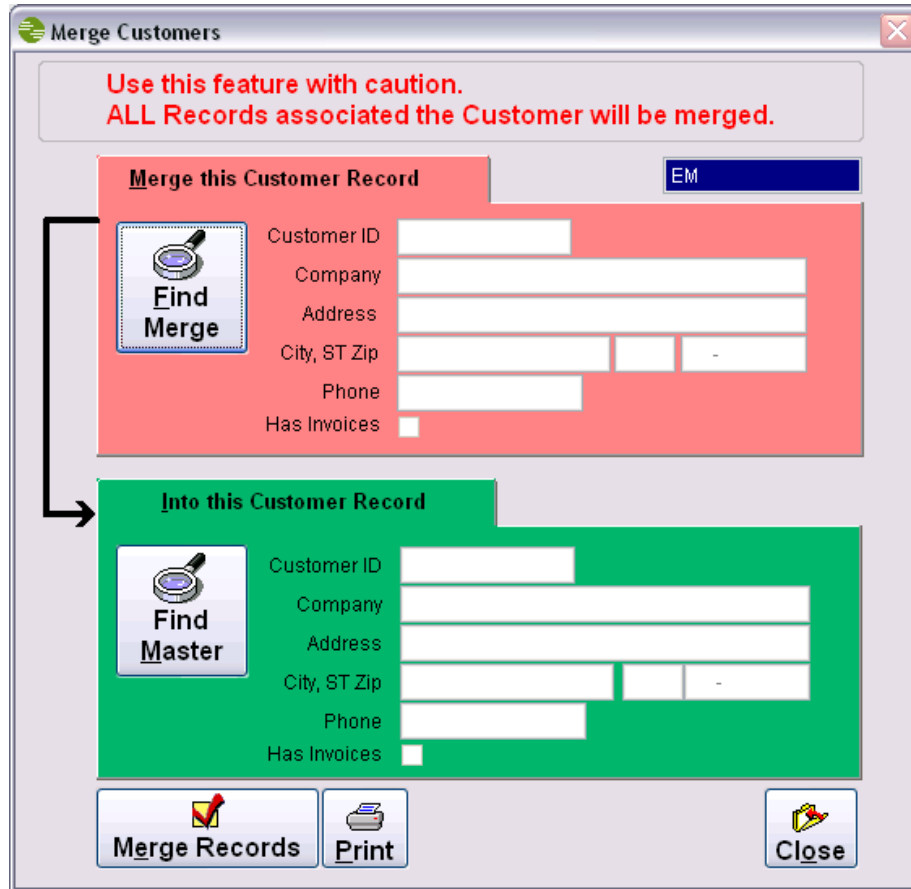

Vehicle Reassign

Reassigning vehicles from one customer to another is a new feature that is a useful tool when servicing a vehicle with multiple owner history. For example, a vehicle that is sold to a new owner but will be serviced at the same store. To reassign a vehicle go to **Administration>Utilities>Reassign Vehicle.**
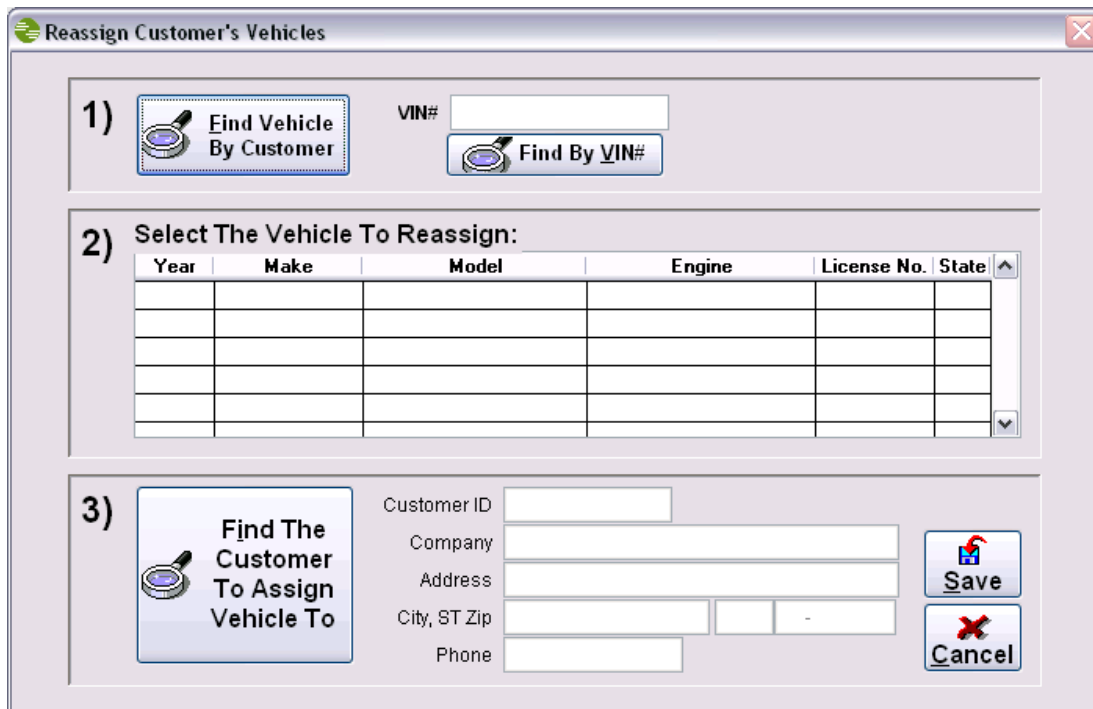
Merge Customer

This new feature is available **only on the single store** application at this time. This allows you to combine customers into one single record, when the same customer has been set up with different customer numbers. Additionally, this feature will allow you to combine multiple vehicles under one record. From the top menu, select **Administration>Utilities>Merge Customer** to bring up the following screen.

To see an audit list of records merged, press the **Print** button from the **Merge Customers** screen:

Line Code Subcategory

This feature allows for more granular accounting of parts from inventory. Typically, the point of sale will default to the manufacturer line code and then group code to group a line of parts. The **Line Code Sub Categories** button provides more detailed accounting of each part in that line, allowing the point of sale to drill down further to reference a sub-category line code.

Inactive Inventory Parts

Currently if you mark a tire/part inactive, it shows with gray shading in the Tire Lookup screen. With this release, once the actual quantity on hand gets to 0, the part number will no longer show up in the tire lookup or stock check screen.

Report Print Range

A range of pages can now be selected when printing large reports from the Report Menu.
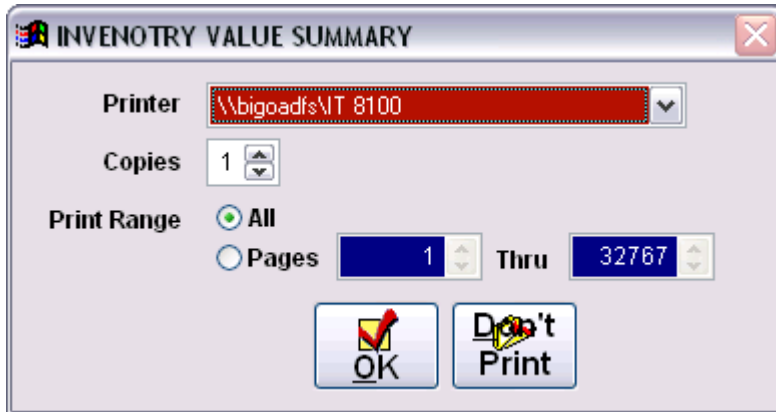
Report Visibility

Owner/Manager can select which Corporate and End of Day reports will be visible to the user. In the Single Store application, go to **Setup Maintenance>Set Reports**.

Sales Tax Reports - *New*

Two new tax reports, Sales Tax Worksheet Detail and Sales Tax Summary have been added to the Single Store application report menu.

Sales Tax WorkSheet Detail
6221 BIG O TIRES #006221
3740 E 104TH AVE
THORNTON   CO   80223   *Run at 03/24/2009*

Start of Business: 02/01/2009
Close of Business: 02/07/2009

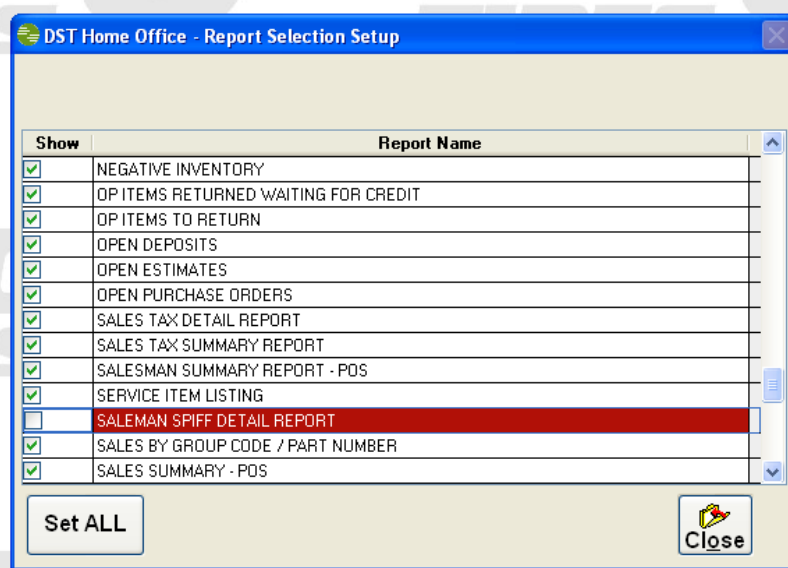| Invoice No.	Date	Customer No.	Amount	Taxable	Non Taxable
TOTAL SERVICE ITEM SALES					
20740	02/07/2009	6221-211010	10.00	0.00	10.00
20741	02/07/2009	6221-213444	49.99	0.00	49.99
20742	02/07/2009	6221-213438	61.88	0.00	61.88
20743	02/07/2009	6221-213067	11.50	0.00	11.50
20744	02/07/2009	6221-213432	11.50	0.00	11.50
20745	02/07/2009	6221-213445	15.00	0.00	15.00
20746	02/07/2009	6221-213440	70.00	0.00	70.00
20747	02/07/2009	6221-213448	20.00	0.00	20.00
20748	02/07/2009	6221-213441	137.16	0.00	137.16
20749	02/07/2009	6221-213442	70.00	0.00	70.00
20750	02/07/2009	6221-213450	59.99	0.00	59.99
20751	02/07/2009	6221-210929	17.50	0.00	17.50
20752	02/07/2009	6221-212471	125.99	0.00	125.99
20753	02/07/2009	6221-213453	17.50	0.00	17.50
20754	02/07/2009	6221-213446	30.00	0.00	30.00
20755	02/07/2009	6221-210197	11.50	0.00	11.50
20756	02/07/2009	6221-211652	10.00	0.00	10.00
20757	02/07/2009	6221-213454	35.00	0.00	35.00
20758	02/07/2009	6221-213421	306.00	0.00	306.00
Total of Total Service Item Sales			$ 6,034.27		

Sales Tax WorkSheet
6221 BIG O TIRES #006221
3740 E 104TH AVE
THORNTON   CO   80223   *Run at 02/24/2009 03:55:2*

Start of Business: 02/01/2009
Close of Business: 02/07/2009

TOTAL OF ALL INVOICES W/SALES TAX	22,783.38
TOTAL OF ALL INVOICES (MINUS SALES TAX)	21,542.44
TOTAL TAXABLE SALES	14,824.03
TOTAL NON-TAXABLE SALES	6,718.41
TOTAL SALES TAX COLLECTED	1,240.94
TOTAL SERVICE ITEM SALES	6,034.27

POS Single Store Initial Release

The initial release of POS Single Store 8.7.1 eliminates the need for a Process Server and combines the functionality of the Home Office application, and POS application into one interface. Shop controls and setup maintenance are managed locally now. Also some Home Office and POS reports have been combined for a more complete report selection. Menu options from both applications are visible, but some functionality of Home Office will be unavailable to single store users like transfers, multi-store reports, and chain wide sales.

Main Menu

BIG O TIRES #006216 - Store 6216 - Navex Shop Management System 8.7.1 LK_BGO _Single
File   End of Day   Administration   Inventory   Time Clock   History   Set up Maintenance   Open Cash Drawer   Help (F1)   AllData   QuickBooks Link

### Repair Shop Main Menu

BIG O TIRES #006216 - Store 6216 - Navex Shop Management System 8.7.1 LK_BGO _Single
Quick Quote   Catalog   Time Clock   Part Lookup   Service Item Lookup   Tire Lookup   Open Cash Drawer   Help (F1)   AllData   Chain Status   Chain Wide History   Previous System History

Version 8.6 – Initial Release January 2008

Track Gross Profit

Track GP percentage right from the repair order and quote screens. As the repair order is built, the gross profit calculator displays the GP% in green if greater than 0 and in red if less than 0 so that pricing adjustments can be made on the fly to reflect a greater margin.
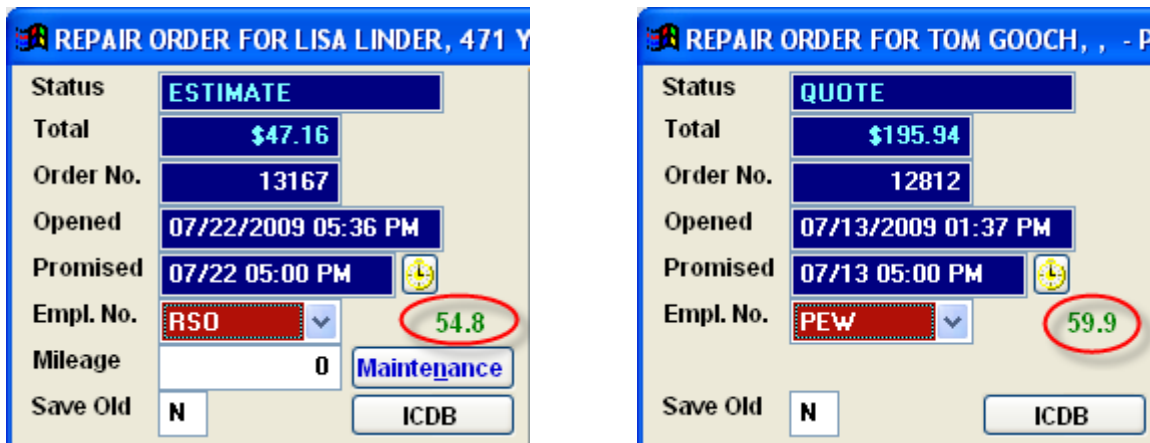
Shop Supplies on Quotes

Shop Supplies now print on the bottom of the quote to provide a more accurate cost to the customer.

Page: 1

QUOTE ONLY

Quote No.   -6996

Date   07/24/2009   Salesperson   DST DST

BIG O TIRES #006219 6219
508 E. CASTLE PINES PARKWAY
Castle Pines North, CO 80108
(720) 733-1707
BAR No.
EPA No.

TEST TEST
Phone   (720)

Not an Invoice - Do not Pay

Part Number	Description	Qty	FET	Each	Extended
INT I-24	INTERSTATE BATTERY I-24	1.0	0.00	81.95	81.95
LAB BATI	BATTERY INSTALLATION	1.0	0.00	15.00	15.00
LAB TIFTR	FREE TIRE ROTATION	1.0	0.00	0.00	0.00

	Quote Totals	
	Shop Supplies	2.46
	FET	0.00
	SubTotal	99.41
	Sales Tax	5.70
	Total:	105.11

All Parts are new, unless otherwise specified.

Time Clock Change

A change to the Time Clock for users running end of day, if they are counting cash and making deposits, the system will automatically add 15 minutes to the check out time. This feature is only available on the A machine.

OP Receive Detail option

Now you have the ability to require real part number for OP parts and tires. When items are a outside purchase using real manufactures' numbers the window will not prompt. This feature is optional and can be turned on or off in **Set up Maintenance>Systems Files.**

IMPORTANT NOTE: *This feature is only available for non-inventory and non-catalog part numbers. The dealer must follow the OP line code guidelines (i.e. OPP for outside purchase parts, OPT for outside purchase tires, etc.).*

In the OP Tire Report the actual number and tire size will display in the report.

Oil Picker

Oil change packages can now be set up to allow the user to choose multiple oil types when using a LOF package. These oil types can be organized into Synthetic, Standard, and High Mileage groups. When the package is added to a repair the Choose Oil Type dialog box will come up.
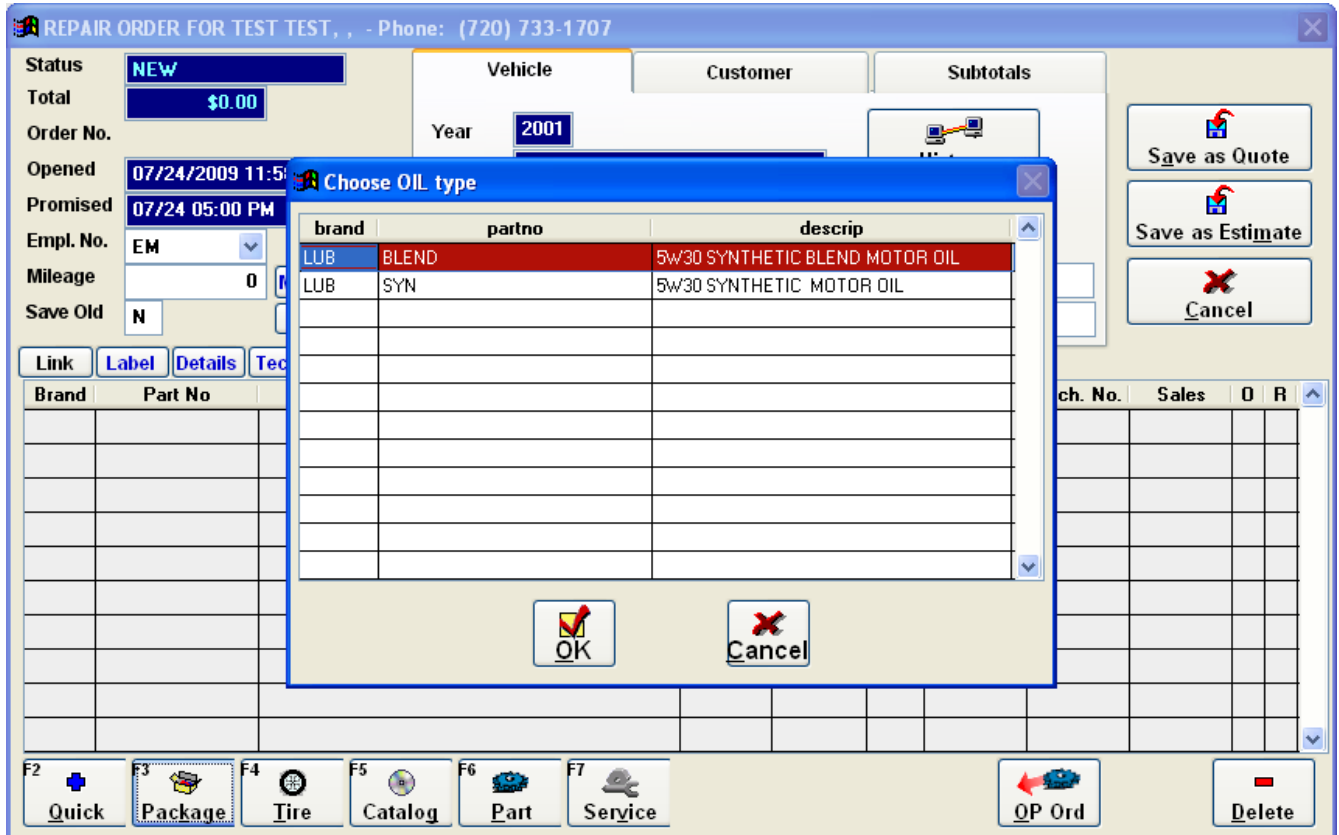
Label Printer Support

Label printers for oil changes and alignments can now be used with the POS. When configured in the package, the Label Printer dialog box will display when the Work Order is generated. You can make description changes, add a second line, and choose whether to print next date and/or next miles.
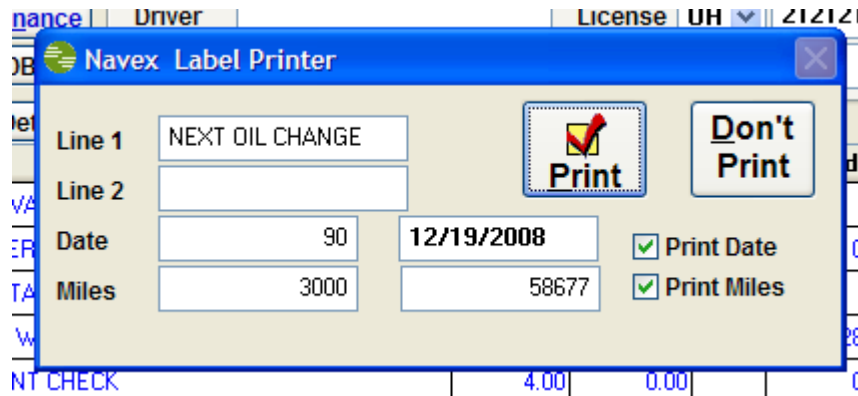
Detailed Notes

Detailed notes will now print on Quick quotes and regular quotes like they do on the invoice printouts. This is ideal for adding compact descriptions to a line item in the quote. You can have a detailed note for each line item on the quote.
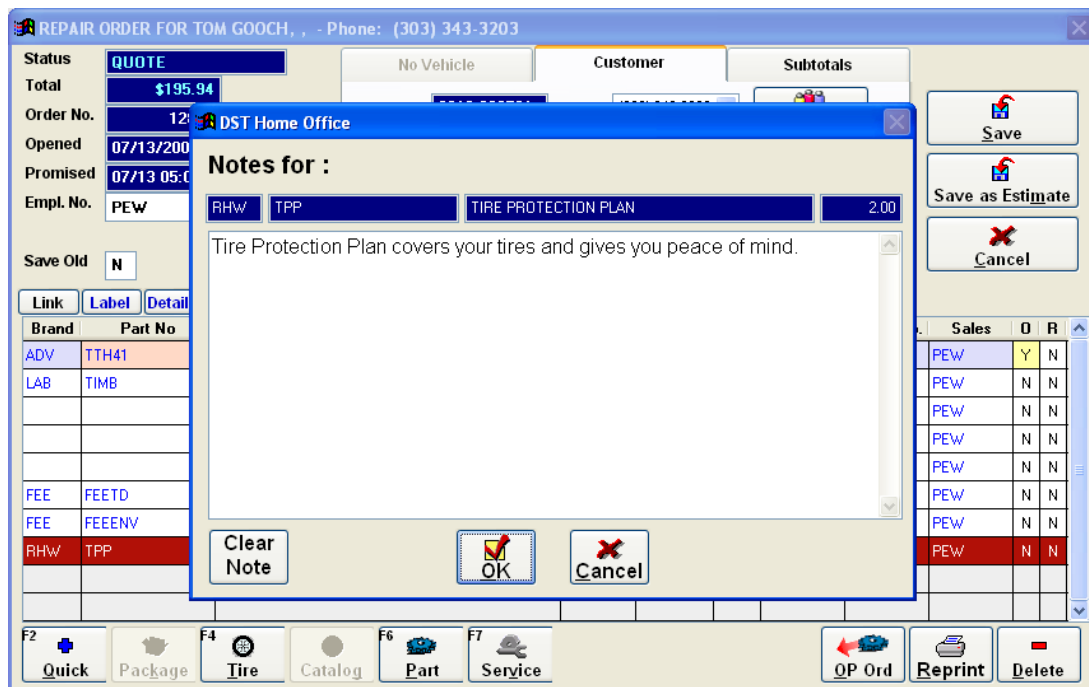
Save Old   N

Qty	Part Number	Description	FET	Each	Extended
2.00	ADV TTH41	195/60R15 88H TEMPEST TOURING HR/VR		66.99	133.98
		30,000 mile road hazard warranty on all Big O Tires.			
2.00	LAB TIMB	MOUNT AND BALANCE		14.00	28.00
0.00		*FREE STEM EXCLUDING TPMS*		0.00	0.00
0.00		TIPSN		0.00	0.00
0.00		*FREE ALIGNMENT CHECK RECOMMENDED*		0.00	0.00
2.00	FEE FEETD	TIRE DISPOSAL FEE		2.25	4.50
2.00	FEE FEEENV	TIRE TAX		1.50	3.00
2.00	RHW TPP	TIRE PROTECTION PLAN		8.71	17.42
		Tire Protection Plan covers your tires and gives you peace of mind.			

QUOTE ONLY - NOT A RECEIPT FOR PARTS AND SERVICE

Shop Supply:	0.00
Tax:	9.04
Total:	195.94

Recommended Codes

By clicking on the **Recommend Codes** button on the Repair Order prior to invoicing, this feature allows for services that a salesman recommends be performed to be printed on the invoice. This information is then sent to Rastar to generate customer reminders and mailers.
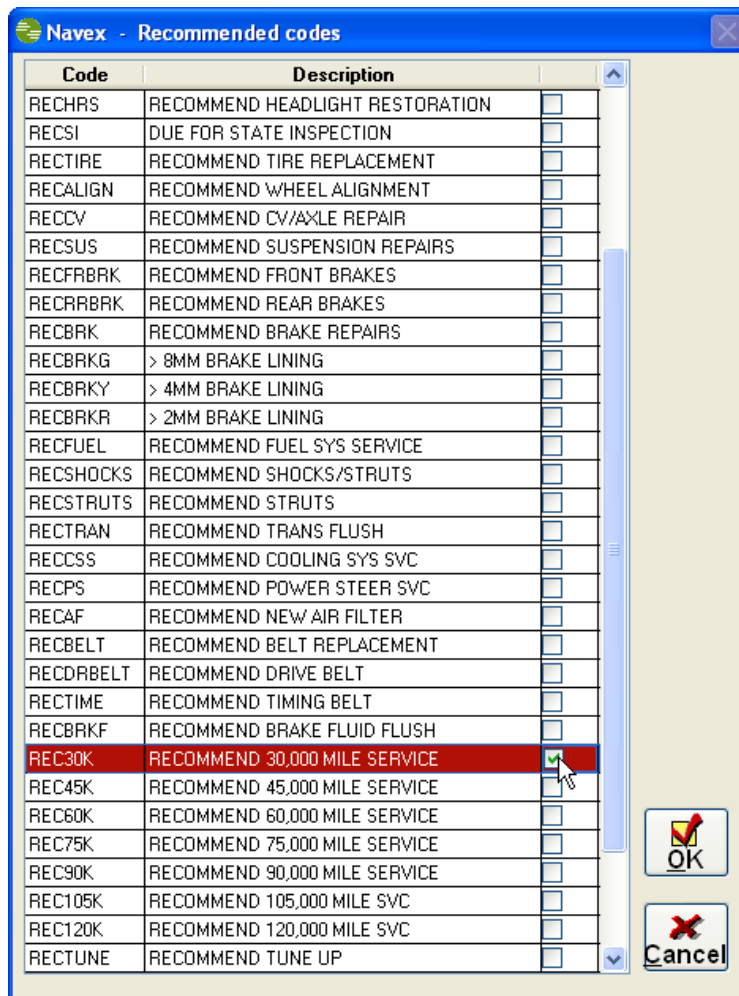
Part No.	Description	Technician	Qty	Unit Price	Total Price
	ROTATE AND BALANCE		0.00		
LAB TIRB	ROTATE & BALANCE	EM	1.00	36.00	36.00
	BRAKE	EM	0.00	0.00	0.00
	LF_____ RF_____ LR_____ RR_____	EM	0.00	0.00	0.00
	TIRE	EM	0.00	0.00	0.00
	LF_____ RF_____ LR_____ RR_____	EM	0.00	0.00	0.00
	SHOCKS/STRUTS _____	EM	0.00	0.00	0.00
	CV BOOT-TORN Y N_____	EM	0.00	0.00	0.00
	ALIGN Y N _____	EM	0.00	0.00	0.00
	BULBS OK? Y / N	EM	0.00	0.00	0.00

```
*** Recomended Services ***
RECOMMEND 30,000 MILE SERVICE
```

Color Coded OP Screen

Outside Purchase screen is now color coded to make it easier to track outside purchase part status:

- Green – Ordered
- Yellow – Not Ordered
- White – Received

AP Voucher & OP Receive Enhancement

Changes have been made in the AP voucher screen and OP receive screen for Vendor Invoice Date to save the users key strokes when moving to other fields. EX: on OP Receive when the user leaves the vendor invoice date field it goes straight to receive qty.


Carry Out enhancement

When creating Carry Out tickets it will bypass vehicle, VIN, unit number and driver validations even when the customer is set up for those validations on regular repair.

Blind Physical

The physical inventory can now be set up to perform blind counts where the user who is performing the physical inventory cannot see current on hand values in the physical inventory screen or on the count sheet.

NOTE: *The user can still perform stock checks on individual items. The on hand values are not hidden there.*

To turn on blind physical go to the **Set up Maintenance** on the main menu bar and click on **System Files.**
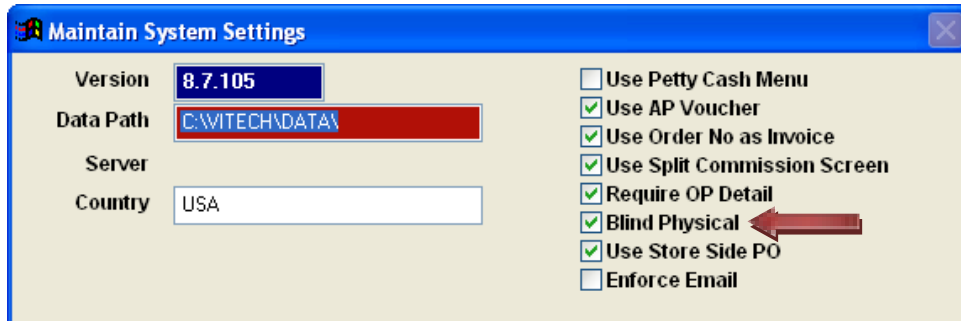
Now go to main menu bar and click on **Inventory>Physical Inventory** to create your blind physical inventory. The on hand quantity is hidden and the count sheet will not show the on hand quantity either:
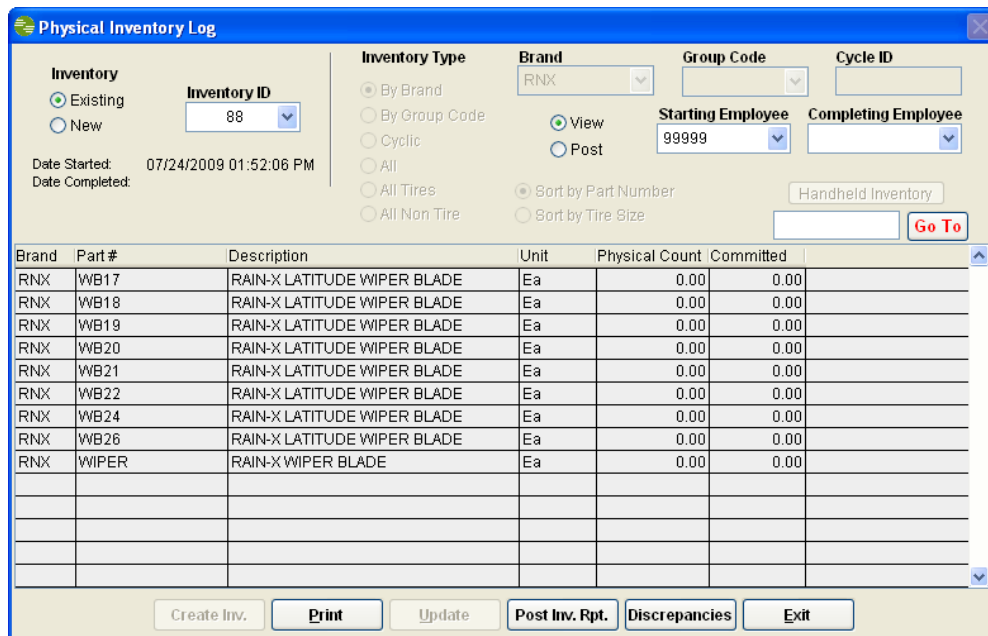
Physical Inventory Check Sheet
6219 BIG O TIRES #006219

| List By: | BRAND | | | Inv ID: | 88 |
| Value: | RNX | | | Date Started: | 07/24/2009 01:52:06 PM |

Actual Count		Brand	Partno	Descrip	Size
_____		RNX	WB17	RAIN-X LATITUDE WIPER BLADE	
_____		RNX	WB18	RAIN-X LATITUDE WIPER BLADE	
_____		RNX	WB19	RAIN-X LATITUDE WIPER BLADE	
_____		RNX	WB20	RAIN-X LATITUDE WIPER BLADE	
_____		RNX	WB21	RAIN-X LATITUDE WIPER BLADE	
_____		RNX	WB22	RAIN-X LATITUDE WIPER BLADE	
_____		RNX	WB24	RAIN-X LATITUDE WIPER BLADE	
_____		RNX	WB26	RAIN-X LATITUDE WIPER BLADE	
_____		RNX	WIPER	RAIN-X WIPER BLADE	

Grand Totals:

The physical count screen also has the option to print only the product where the on hand value is not equal to zero.
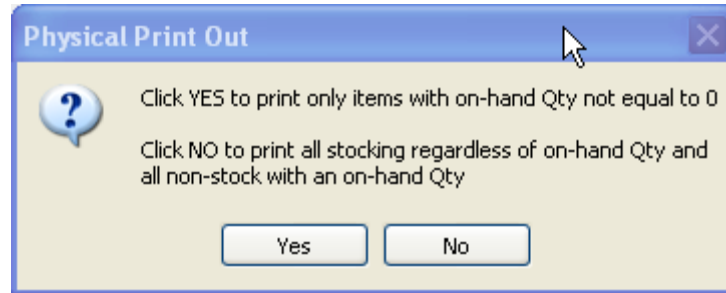
Stock Check Displays Min/Max

Now when using the Stock Check screen, the Min/Max stock levels are displayed.

Receive w/o PO Enhancement

The receive parts screen when no PO was created includes a running total, a field to record vendor invoice number, vendor invoice date, and as you add lines the vendor and brand code carry to new line and the prompt stops at the part number field.


The report that prints for parts received now displays the description, vendor invoice, and vendor invoice date. **NOTE**: The invoice number and date were added to home office report for parts received without PO.

Parts Received without a Purchase Order   *Page 1*
Store Number 5014   *02/01/2008 06:48:23 PM*

| Ven. Code	Brand	Part Number	Description	Quantity	Unit Cost	Extended Cost	Invoice No	Invoice Date
CSK	ANC	91-28	WIPER BLADES 28" 120316	8.00	6.80	54.40	AS90987B	01/25/2008
CSK	ANC	31-16	WIPER BLADES 16" 012226	2.00	3.51	7.02	AS90987B	01/25/2008
CSK	ANC	31-18	WIPER BLADE 18"	4.00	2.00	8.00	AS90987B	01/25/2008
				14.00		69.42		

Quick Quote Enhancement

If you choose a customer with the FIND button for quick quote and the quick quote is converted to a repair, it bypasses having to choose customer a second time. However, if you manually enter a customer name, you will be prompted to pick a good customer record when converting to repair.
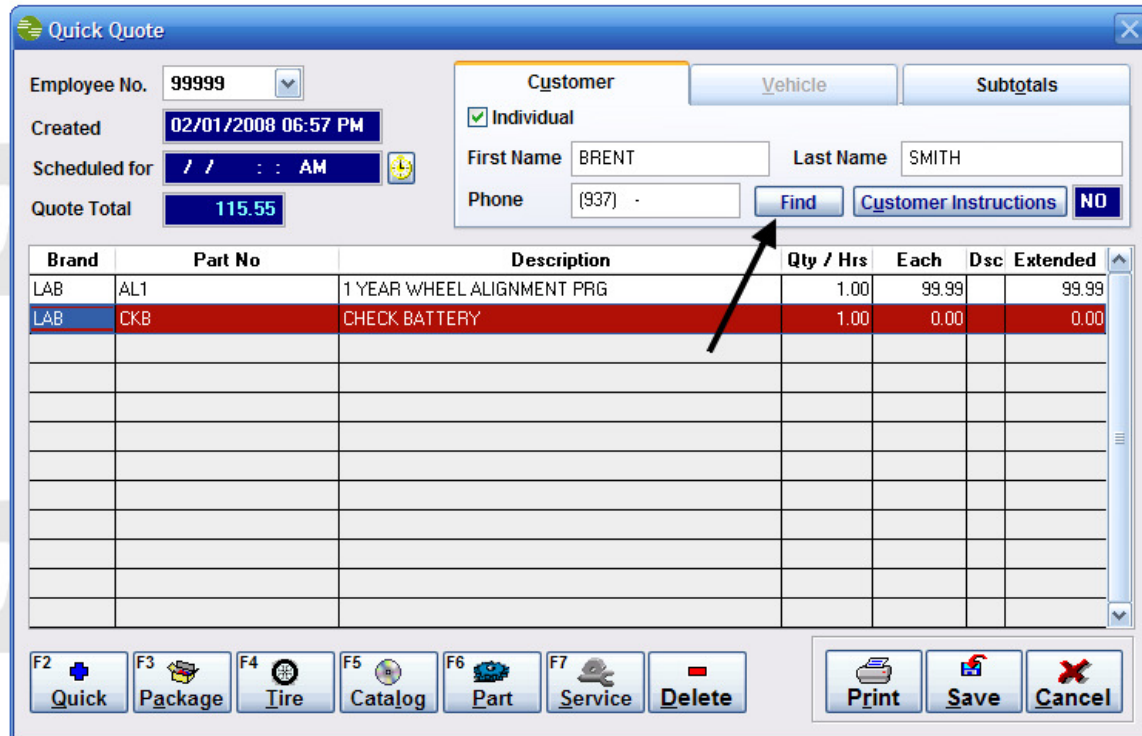
Time Clock Change

The security table has changed to allow more control over the time clock. You now can set security for general access to the time clock and grant permission to edit time for salesman and mechanic from the time clock. This does not prevent users from changing mechanics or salesman prior to ticket being billed out.
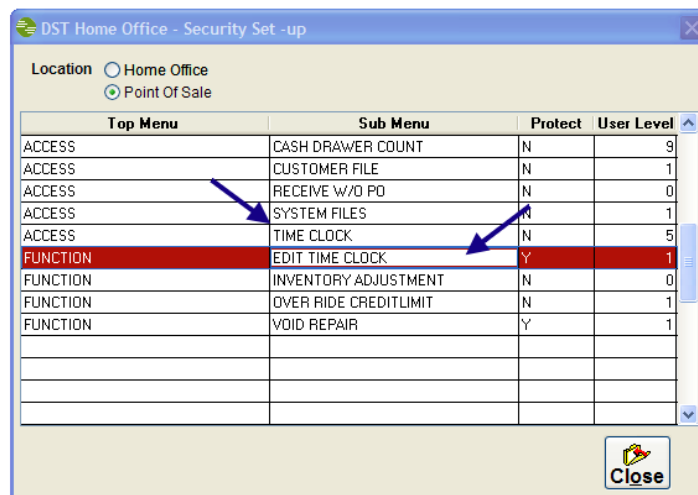
Receive w/o PO Change

Now the system will not allow you to receive parts that are marked as Inactive.

Torque Specifications on Invoice

At the bottom of the invoice a notice to the customer is printed on the bottom of the invoice stating that wheels a have been torqued to specification.

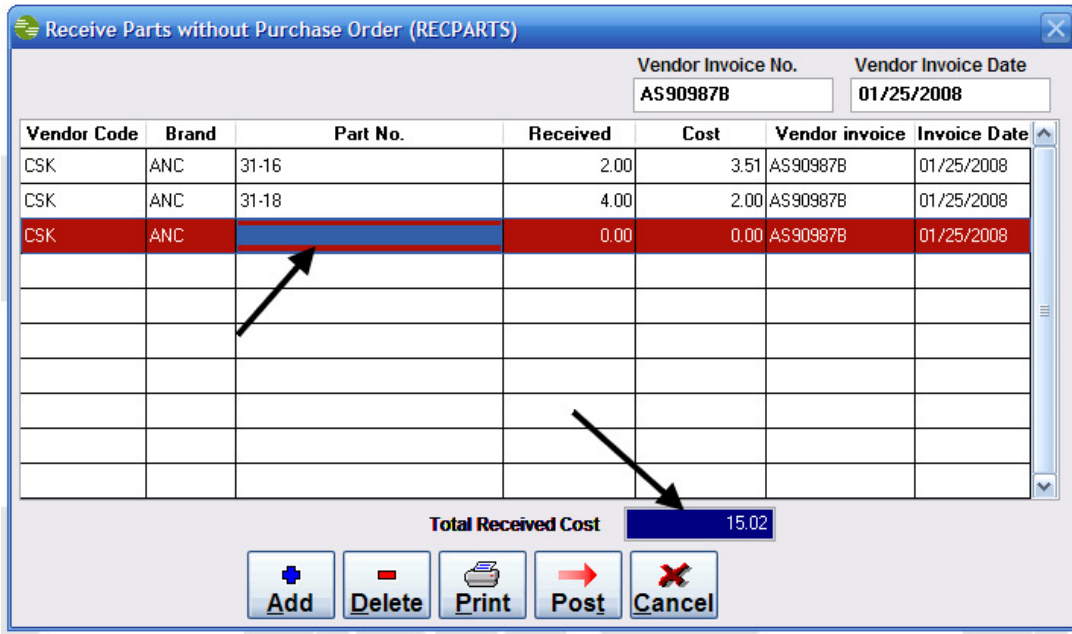## Sales by Group Code/Part Number by Salesman

The Sales by Group Code by Part Number has been modified to include Salesman.

Keyword Search

Now if set in the Master Inventory, users can search by keywords when using the Quick Add button in Repair Shop.

Receive w/o PO

The Receive w/o PO option was added so users can receive parts when no PO is created. It includes a running total, a field to record vendor invoice number, vendor invoice date, and as you add lines the vendor and brand code carry to new line and the prompt stops at the part number field.

Receive Parts without Purchase Order (RECPARTS)

		Vendor Invoice No.		Vendor Invoice Date	
		AS90987B		01/25/2008	

Vendor Code	Brand	Part No.	Received	Cost	Vendor invoice	Invoice Date
CSK	ANC	31-16	2.00	3.51	AS90987B	01/25/2008
CSK	ANC	31-18	4.00	2.00	AS90987B	01/25/2008
CSK	ANC		0.00	0.00	AS90987B	01/25/2008

Total Received Cost   15.02

[Add] [Delete] [Print] [Post] [Cancel]

There is also an accompanying report that reports parts received without a PO and displays a description, vendor invoice, and vendor invoice date.

Parts Received without a Purchase Order   Page 1
Store Number 5014   02/01/2008 06:48:23 PM

Ven. Code	Brand	Part Number	Description	Quantity	Unit Cost	Extended Cost	Invoice No	Invoice Date
CSK	ANC	91-28	WIPER BLADES 28" 120316	8.00	6.80	54.40	AS90987B	01/25/2008
CSK	ANC	31-16	WIPER BLADES 16" 012226	2.00	3.51	7.02	AS90987B	01/25/2008
CSK	ANC	31-18	WIPER BLADE 18"	4.00	2.00	8.00	AS90987B	01/25/2008
				14.00		69.42		

Stock Check with Min/Max

When using the Stock Check feature in POS you now can see the Min/Max levels displayed in the screen.

Parts Return - *New*

Parts return is a new feature that will allow you to track **non-inventory** parts that need to be returned to the vendor. The process begins as soon as you delete the part off of the repair and there are two parts to the process: *Part Return* and *Waiting for Credit*. To get a better understanding please see http://www.vitech-net.com/NAVPartsReturn.pdf for details on how this process works.

# Vehicle Look Up

When using the catalog to lookup vehicle information it will now display extended model information.
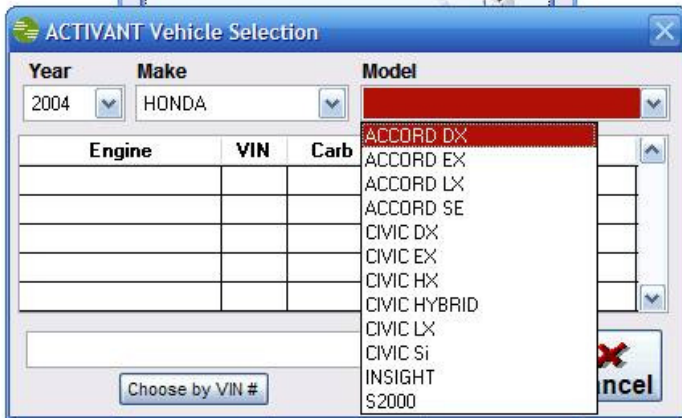
Maintenance/Recommended Service

From the repair order you now can check preventative maintenance and recommended service intervals for the selected vehicle in the repair. Clicking on the *Maintenance* button in the open repair order will bring up the Recommended Services screen.
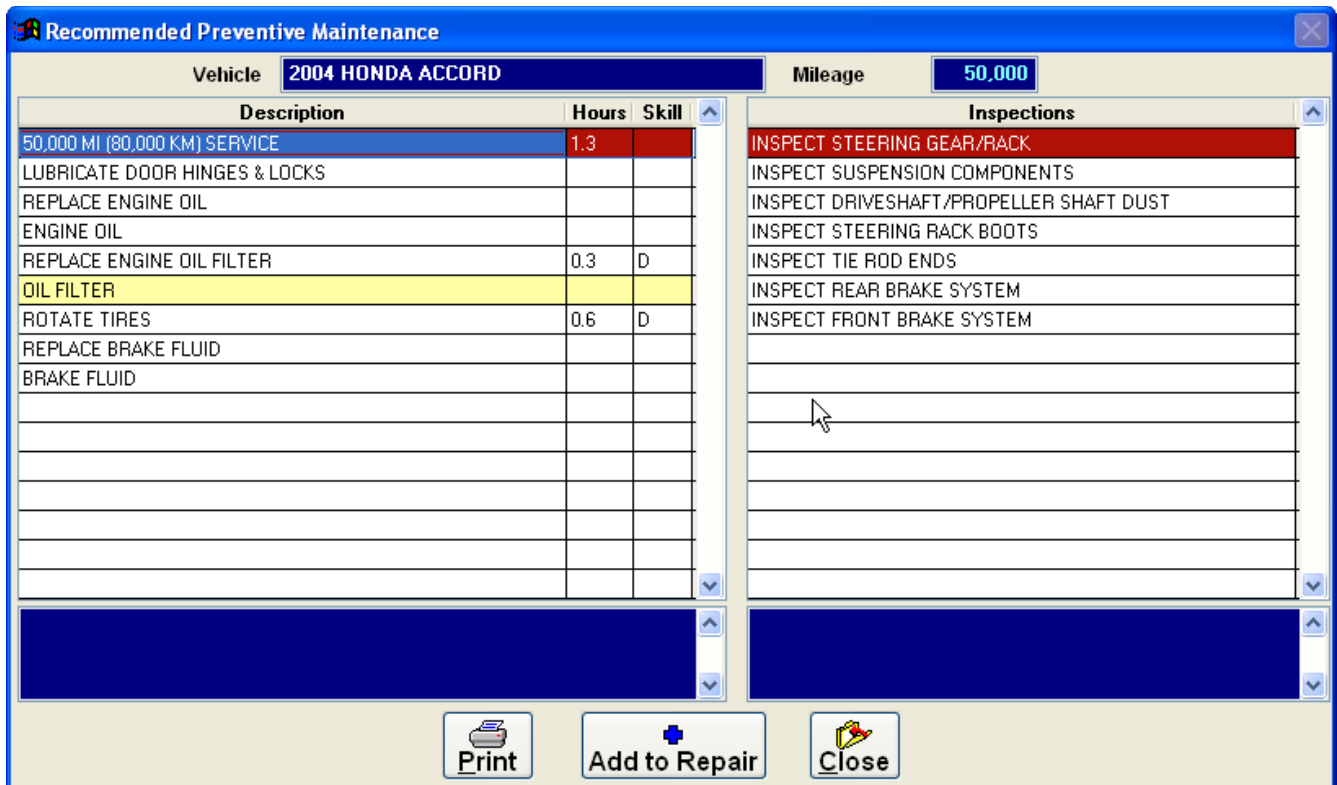
On this screen the oil filter are recommended to be replaced, the highlighted line item informs the user they will be prompted for the part from the catalog if they choose **Add to Repair.**
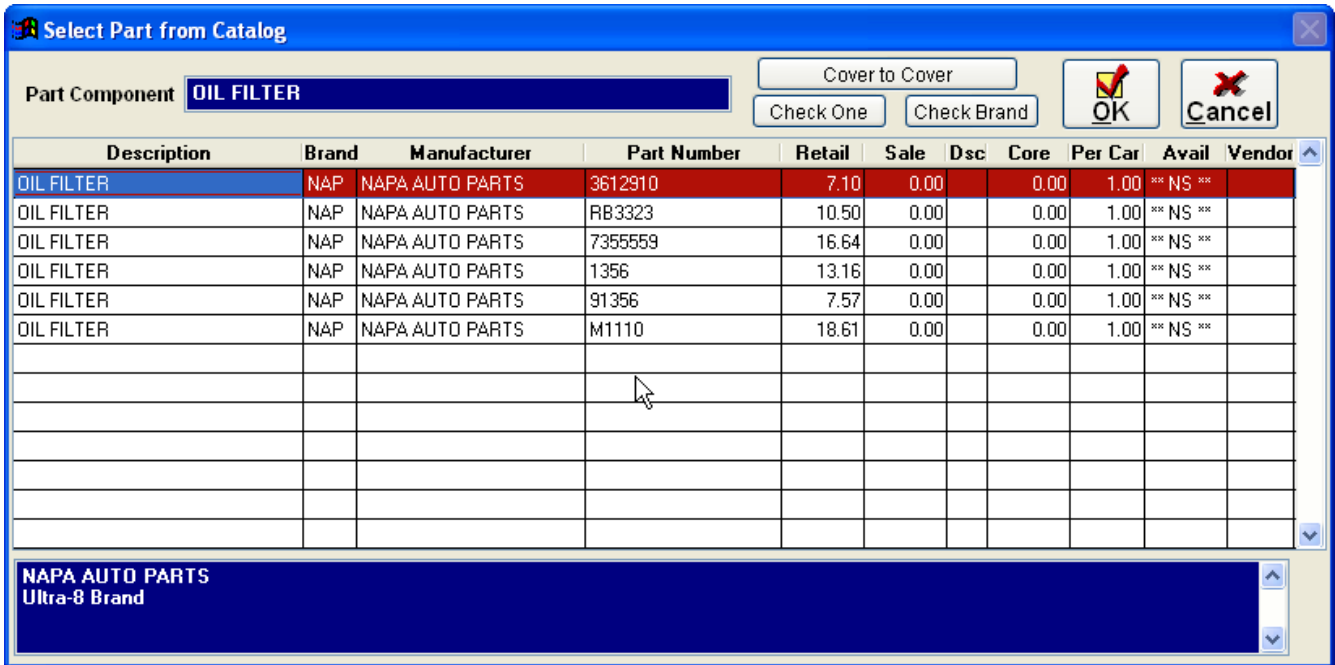
Information displayed in the Select Part from Catalog screen is based on catalog setup and configuration. Only products set up for availability display and sort order is user defined based on priority in the catalog settings.

Once the part(s) are selected the labor and inspection items are automatically added to the repair order.
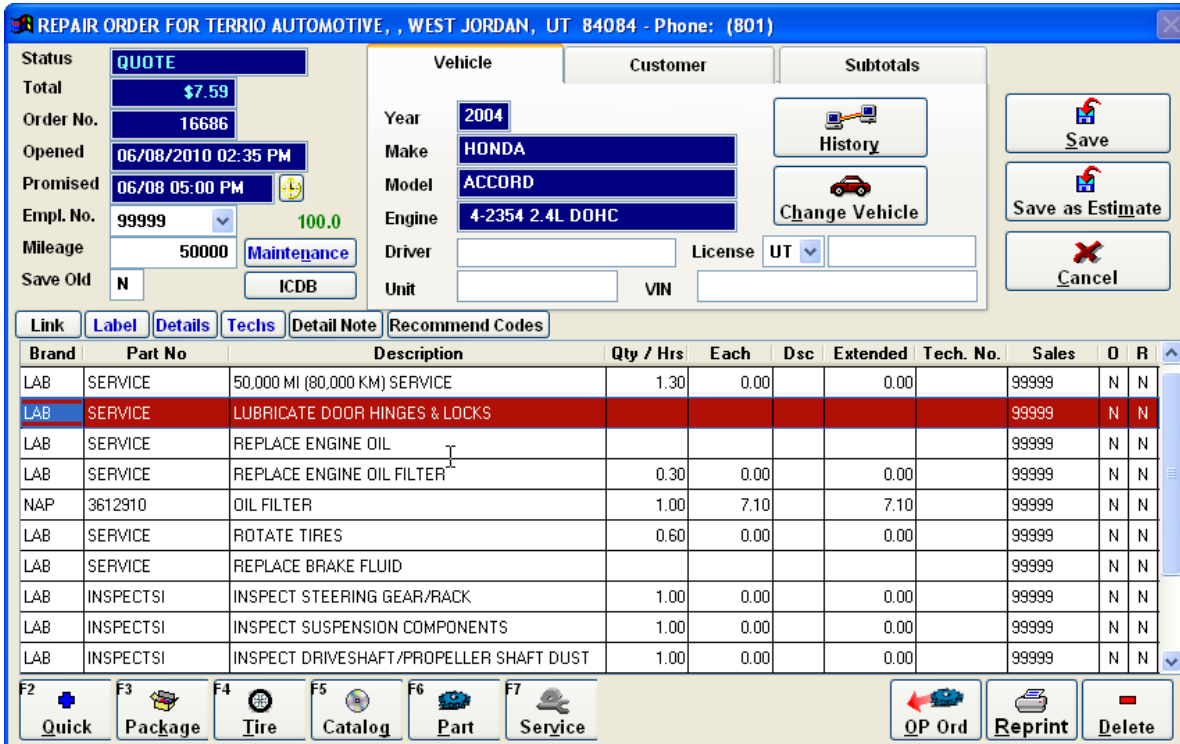
Vendor Communications

Ordering parts from an outside vendor's website is now integrated into POS using the Vendor Communications menu option.
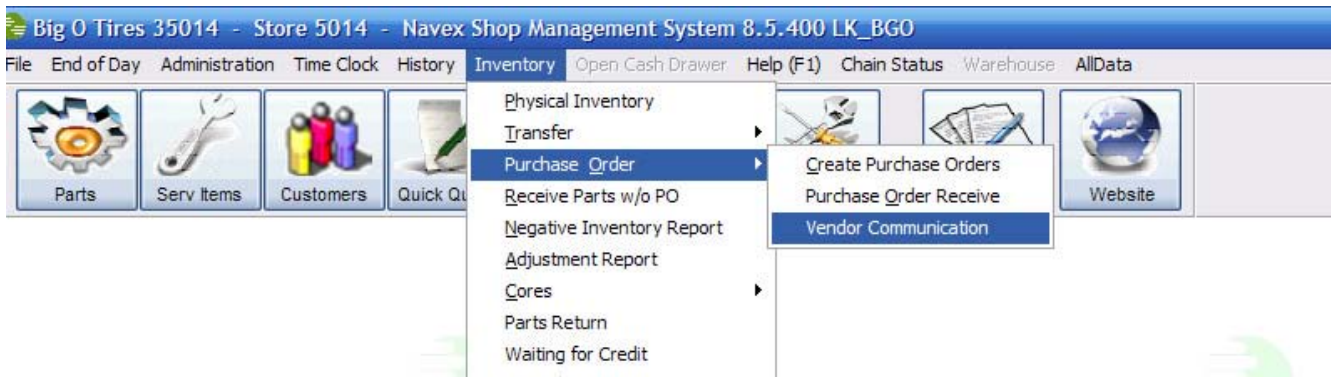
When choosing a vendor communication type the user needs to enter in the appropriate information in the fields to configure a connection to the vendor website. To better understand this process visit http://www.vitech-net.com/Navex%20NAPA%20Setup.pdf for more detailed instructions.
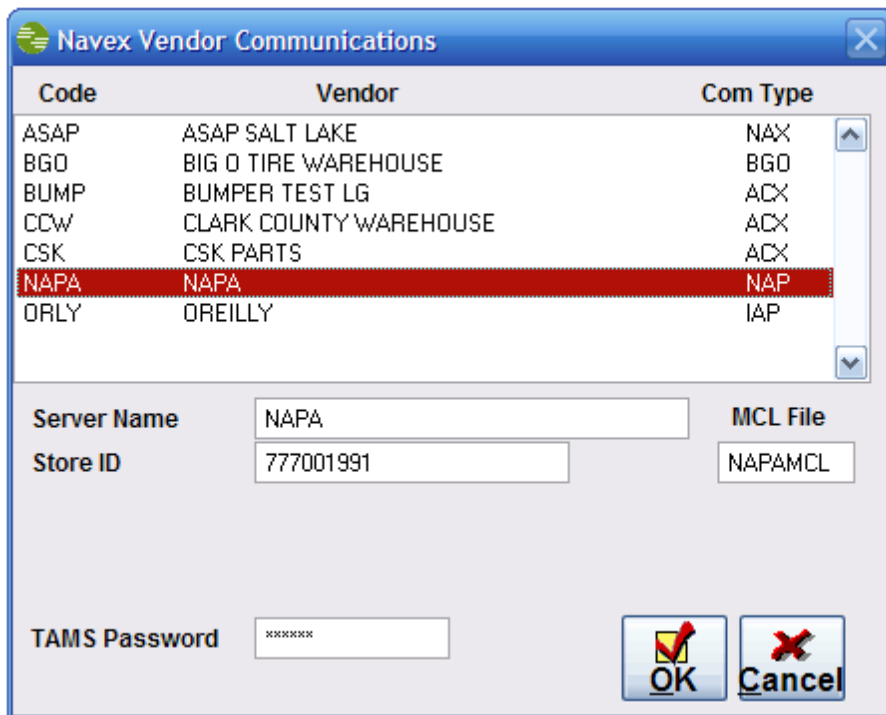
Split Commissions

This feature is turned on in the Home Office>System Administration screen. To use, click the **Techs** button on repair ticket screen and the Technician screen appears. You now have the ability to assign up to six mechanics to each line in the work order.

Integrated Credit Cards

For integrated credit card users, the system is now recording trout ID for call in approvals.

OP Receive Button

In older versions of POS the OP Receive button was included in the Work Order screen for those users not wanting an audit trail. This feature can now be turned off.

Outside Purchase Changes

When making orders from vendors that cannot be done electronically from the repair order, the order screen has been changed to include check boxes.

*Repair Order number 15172 has three items sold but not in stock , when viewing the outside purchase screen, highlight any one of the three items and double click or hit **Enter** to access the **Order Outside Purchase** screen.*

The outside purchase vendor order screen appears, choose the vendor (in this example NAPA) and click the check box for each line in the detail grid that is to be ordered from the vendor. In this example the first two lines will be ordered from current vendor NAPA and each will be checked, the third line is to be ordered from another vendor and is not checked. After choosing items to order, click the **OK** button and print out the order.

Receive on Accounts

When taking ROA's at store side, a validation has been added to not allow ROA to non-charge customer. This will help with the accidentally recording of deposits to ROA's. Also the Customer signature required has been added to ROA / Deposit Receipts.

Time Clock Change

The time clock screen and time sheets have been changed to accommodate those dealers whose first day of the week is a day other than Sunday. In addition, the screen and time sheets reflect hours worked at hours and minutes and as hours as a percentage. For example, 09:41 in Hrs Min column is 9 hours and 41 minutes and is equal to 9.683 in the Hrs % column. The new screen is viewed by clicking Detailed Display from the clock in screen.

Day	Clocked In	Clocked Out	Type	HRS /Min	HRS%
MONDAY	10/29/2007 09:45 AM	10/29/2007 07:26 PM	WORK	09:41:00	9.683
TUESDAY	10/30/2007 10:02 AM	10/30/2007 07:56 PM	WORK	09:54:00	9.900
WEDNESDAY	10/31/2007 10:02 AM	10/31/2007 02:28 PM	WORK	04:26:00	4.433
WEDNESDAY	10/31/2007 03:00 PM	10/31/2007 08:03 PM	WORK	05:03:00	5.050
THURSDAY	11/01/2007 09:57 AM	11/01/2007 08:18 PM	WORK	10:21:00	10.350
FRIDAY	11/02/2007 10:00 AM	/ / : AM	WORK	00:00:00	0.000

Edit Time

Date Range 10/27/2007   through 11/02/2007   Refresh   Previous Week

BOTTOM 415, MICHAEL

DISPLAY   39:25:00   39.416

Close   Print Time Sheet

The new screen automatically determines the first day of your pay week based on a confutation setting in the system. The screen displays all clock in times and clock out times for the current week. Both the Hrs /Min column and HRS % column are totaled. A different date range can be chosen and then click Refresh button to view for a different pay period. The Previous button moves back one week.

Click the Print Time Sheet Button, to view the new Time Sheet format

** Weekly Time Sheet **

5015 BIG-O TIRES #35015   Page : 1
      6565 WINFORD AVENUE
      FAIRFIELD TWP, OH 45011   Printed : 11/02/2007 02:16:14 PM

Employee : HARTMAN 515, BLAKE   Position: GENERAL SERVICE

	Clock In	Clock Out	Type	Hrs Min	Hrs %
Saturday	10/27/2007 07:01:00 AM	10/27/2007 05:55:00 PM	Work	10:54:00	10.900
Monday	10/29/2007 11:58:00 AM	10/29/2007 04:25:00 PM	Work	04:27:00	4.450
Monday	10/29/2007 05:09:00 PM	10/29/2007 07:56:00 PM	Work	02:47:00	2.783
Wednesday	10/31/2007 07:05:00 AM	10/31/2007 01:06:00 PM	Work	06:00:00	6.017
Wednesday	10/31/2007 01:36:00 PM	10/31/2007 02:04:00 PM	Work	00:28:00	0.467
Thursday	11/01/2007 07:05:00 AM	11/01/2007 01:54:00 PM	Work	06:49:00	6.817
Thursday	11/01/2007 02:34:00 PM	11/01/2007 03:49:00 PM	Work	01:15:00	1.250
			Totals :	32:41:00	32.684

I certify the hours on this time sheet to be true and correct.
I completed all parts and services assigned to me to be performed.

Employee Signature _____Date_____

Manager Signature _____Date_____

To print all time cards for all employees, there are two menu choices:
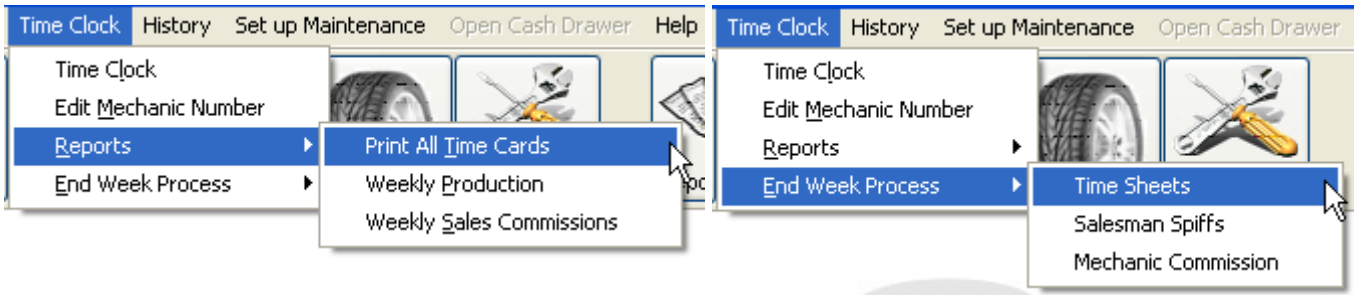
Either menu choice displays the screen to choose week begin and end dates