Cash Register Mode is where you will do all your sales. You will also be able to do other register functions such as pay-in, pay-out, viewing daily statistics, and reprinting work orders, invoices, and stickers. The Cash Register Mode menu has the following options:

Bay Screen

The Bay Screen is where you initiate sales and create your work orders and invoices.

License Plate Type the license plate in the field to initiate the sales process. If the license plate matches an existing customer, that customer will be pulled up and can be checked in. If the license plate does not match an existing customer, you will be prompted to add the customer.

Name Search Use the Name Search field if the vehicle is not found in the system using the license plate, but you know that the vehicle has visited previously. A common problem is that the license plate was misspelled on the previous visit.

Press the Search button or simply press Enter on your keyboard after finishing your entry. Select the vehicle and correct the mistake.

You will be presented with an option to search "First Letters" or "Anywhere in Name".

"First" will use the criteria (what you typed in) as the first part of either the first and last names – i.e., if you type "AN", the system will return any customer with "AN" in the name, such as "Andy Smith" or "Bill Anderson".

"Any" will use the criteria to find any first or last name with that string of characters anywhere in the name – i.e., "AN" will return both "Andy Smith" and "Bill Anderson", as above, but will also return "Brandon Smith" and "Bill McAndrews".

Search Leave the License Plate and Name Search fields blank and press the Search button for a richer search. Search any combination of the fields available.

Bay Screen List In the screenshot on the right, a customer has been checked in, and a work order created. The car is listed on the Bay Screen. Subsequent cars will also be listed on this screen until they are checked out and the invoice printed.

There is no limit as to how many cars can be placed in the bay. If there are more than seven cars in the bay, scroll arrows will appear at the right so that you may view all vehicles in the bay.

Invoice Button Displays a vehicle icon. Pressing it starts the invoicing process.

Estimates Button Displays a notepad page icon to differentiate it from invoices. Pressing this button will take you into the estimate for modification or to convert it to an Invoice. Green lettering on the buttons differentiates it further and the Auxiliary button will be blank.

Payment Button Displays a cash register icon to differentiate it from invoices. Pressing this button will take you into the checkout screen where the invoice can be modified or paid. The Auxiliary button will display the current invoice amount.

Service History Button Displays the vehicle license plate number. Pressing it allows you to view and print the entire history for that vehicle, or to reprint an old invoice.

Customer Information Button Displays the customer's name Pressing it allows you to view or edit the customer's name, license plate, address, or vehicle year/make/model/engine information. You will also be able to assign this vehicle to a fleet if not done at check in, or delete this vehicle from a fleet if required

Manufacturer Specifications Button Displays the vehicle's year, make and model. Pressing it allows you to view or print the Sage Service Manual or Service Maintenance Schedule ("The Gauges") for the vehicle, containing information about severe service manufacturers' recommendations, fluids, fluid quantities, and other information.

Auxiliary Button Displays the length of time a vehicle has been in the bay. It will be blank for estimates and show invoiced amount for unpaid invoices. The time starts from the moment the license plate is entered and continues until the vehicle is checked out. Pressing this button will present you with several options:

- **Delete From Bay** Use this option to delete the vehicle from the bay without creating an invoice. You may be prompted for a security code (see Security Setup) to do this. Note that although the vehicle will be deleted from the bay, it will still print on the Daily Activity Report with a "Bay Delete" status.
- **Reprint** This function will allow you to reprint the work order, Sage Service Manual, Sage Maintenance Schedule, or the static sticker.
- **Park (Unpark)** "Parking" a vehicle means that you completed the service but for some reason are unable to cash out the customer (as in, the vehicle was dropped off and the customer will return later). Park the vehicle in this case so that the bay time will not continue to tick and skew your averages. If the vehicle is already

3
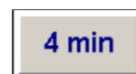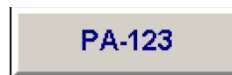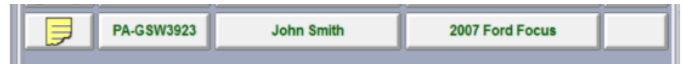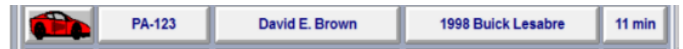
parked, you can Unpark the vehicle so that the time will continue to accrue.
- **Cancel** This will bring you back to the bay screen with no action taken.

The other buttons of an Estimate are the same as invoices, but the text is green to further differentiate it from an invoice.

Quick Sale Button Allows you to post a sale without going through the work order/invoice process. Note that this type of sale won't track customer information. Certain services for which you want to require customer information can be disabled from the Quick Sale function. Our suggestion is, do not use the Quick Sale for any services where you work on a vehicle, as you will lose the history of this sale – Quick Sale should only be used for impulse or convenience store items. You can disable the Quick Sale button completely by contacting Sage Support.

Show Button This is used to filter the bay screen list. By default, you will see "Show All". Pressing the button toggles you through:
- Show All
- Show Invoices
- Show Estimates

4
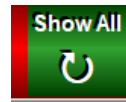
Daily Statistics

Page 1 of 1

The Daily Statistics Page provides real-time sales statistics for the facility. This page continues to automatically refresh while open.

Print Allows you to print the information on the page.

Note: Because the page continues to automatically refresh, you will want to close the page to switch to another program or window of your computer.

In addition to the print option, you will also have the following options:

- Business Group, Employees
- X Tape
- Services

Business Group Button

This button opens a pop-up window that allows you to see a breakdown for each business group you have configures (Lube, Car Wash, Impulse, etc.). You will not see this option if you have only one business group.

Click "Next" on the pop-up window to toggle between business groups.
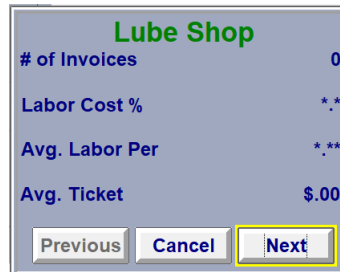
Emp Button

This button opens a page that displays employee-specific statistics (car count, ticket average, etc.) for the day.

Daily Statistics Button Use to return to the main Daily Statistics page.

Print Allows you to print the displayed page information.

Employee Name Select an employee listed to see a breakdown of their individual sales.

Hours Button Provides a breakdown of each employee's hours for the day along with the current week and previous week.

You will also see whether each employee is currently clocked in or not along with sales details for each employee for the current day and the current week.

This report is useful for keeping labor costs under control by seeing which employees are nearing overtime.

X Tape Button Provides sales statistics. It has been superseded by the Daily Sales Report at day end, and by the Daily Statistics screen, but is provided for users that are accustomed to the x-tape function of legacy software systems.

Service Button Provides the number, dollar amounts, and percentages of services performed on the current day, and can print graphs of each. Graph is available for:

- # of Services Sold
- % of total Cars for each service
- % of total sales for each service

Note how QuickTouch tracks different types of sales (Invoices, Quick Sales, and Gift Cards) separately. In general, Invoices are assumed to be vehicles that have received a lube-oil-filter or other type of service; Quick Sales, done through the Quick Sale screen, are assumed to be either "impulse buys" (an air freshener from the lobby, perhaps), or a simple sale that does not qualify as a service (i.e., installing a wiper blade); Finally, Gift Cards are broken out separately because gift card sales (from an accounting standpoint) are generally booked as revenue for the business when the card is redeemed, not when the card is sold. Thus, if a customer purchases a full-service oil change and a gift certificate for someone else, only the oil change revenue will show up under the Invoice and Average Ticket calculations.
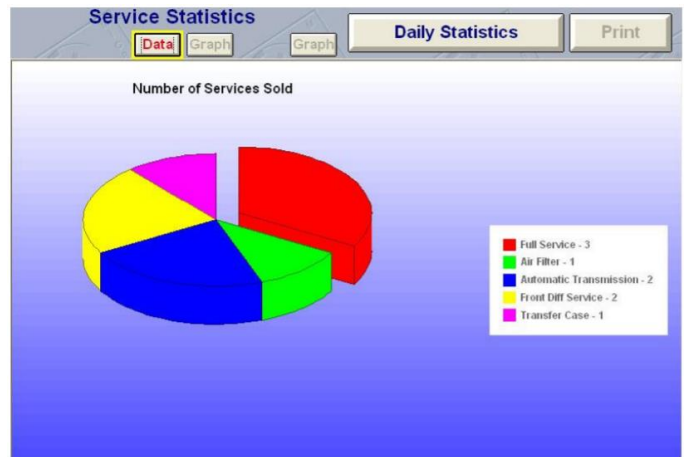
Cash Register Functions

Cash Register Functions are used to adjust cash drawer amounts for various reason or circumstances.

These functions, because they affect the cash in drawer amounts, will all be reflected on the Exception report and daily sales reports.

The following functions are available:

1. Void Invoice
2. Refund Invoice
3. Pay In
4. Pay Out
5. Open Cash Drawer
6. Starting Drawer Fund

Note that for the Void, Refund, Pay In, and Pay Out functions, a receipt invoice will be printed. If you need a second copy of the Void or Refund, you can use the Reprint Invoice function under the Cash Register Mode menu. For Pay In and Pay Out, you will not be able to reprint a receipt invoice, but these transactions will be reported in the Daily Activity Report at the day-end (if this report is selected to print automatically), or you can print it manually under the Period End Processing menu, Reprint Reports. There is also a Pay In/Pay Out report available which can be printed manually under the Period End Processing menu, Reprint Reports.
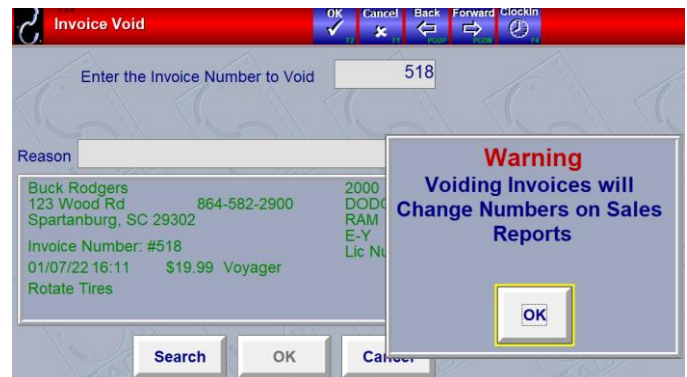
Void Invoice

This function will remove an invoice from the system. Note that the Invoice Number will remain and will show on the sales reports as a Voided Invoice, but the sale will be removed from sales figures and cash drawer amounts, and the inventory will be placed back to the On Hand amount.

Voiding an invoice is normally done if the cashier forgot to add something to the invoice, or if the cashier indicated the incorrect payment method, or for fleet accounts that were invoiced incorrectly (required information missing on the invoice, perhaps). Note that to correct the invoice in these cases, you should use the newer Restore Invoice function.

Voided invoices are listed on both the Exception Report and the Daily Activity Report. Note how on the Exception Report, the voided invoice is listed with both the "Activity Date" (the date of the original invoice) and the "Exception Date" (the date the invoice was voided). The owner should review these transactions to ensure that the transaction was processed correctly. If money was refunded to the customer, you should use the Refund function, not the Void function to ensure an accurate Day End Processing.

Refund Invoice

This function is used to refund a customer's money. The money will show as refunded on the sales reports, but inventory will still show as being used.

Note the "refunded to Customer" option – you can choose which payment method (by pressing the "Cash" button) will be refunded to the customer, i.e., cash out of the drawer, or a credit on their credit card.

Refunded invoices are listed on both the Exception Report and the Daily Activity Report. Note how on the Exception Report, the refunded invoice is listed with both the "Activity Date" (the date of the original invoice) and the "Exception Date" (the date the invoice was refunded). The owner should review these transactions to ensure that the transaction was processed correctly.

Pay In

Use this function whenever money that is not part of a sale is added to the drawer, such as a roll of change, or a miscellaneous payment (payroll advance perhaps that is being repaid). This transaction will not be added to the daily sales but will be reflected in the Day End process.

Pay Out

Use this function whenever money is removed from the drawer that is not part of a sale, such as a cash advance to an employee or a purchase of an outside part. This transaction will be reflected in the End of Day process. Note that if you pay out more cash than you take in, your cash drawer amount will be reduced when you do the Day End Processing. You will need to reset the Starting Drawer Fund for the next day.
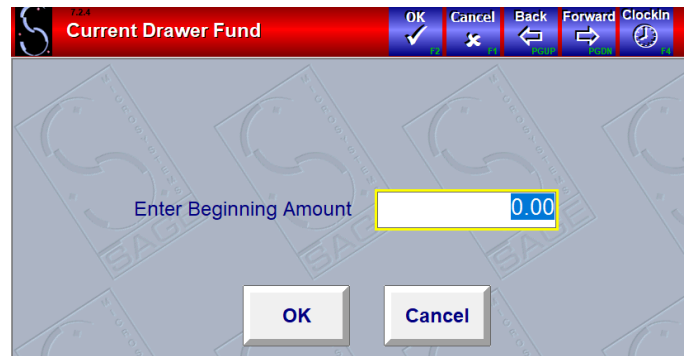
Open Cash Drawer

Use this function to open the cash drawer to make change without having to use the key.
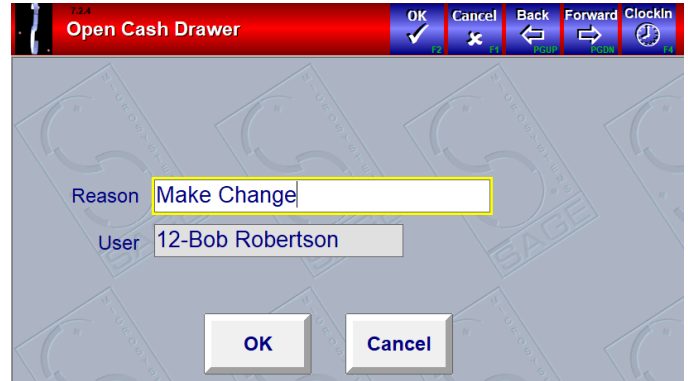
Starting Drawer Fund

Use this function to set the starting drawer amount for the start of the day. Once set, usually you don't need to change this.
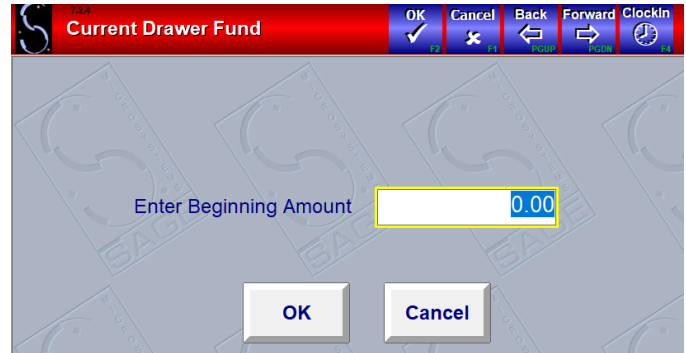
Reprint Invoice

This function allows you to reprint any invoice in the system. If the invoice in question is not the last non-Quick Sale invoice, then you must know the invoice number.

If you don't know the invoice number to reprint, you can reprint the invoice directly from customer or vehicle history.

A reprinted invoice will appear exactly as the original, except for a "Reprint" next to the invoice number. If you are using the Buy X, Get One Free type of promotion, the promotion information won't reprint as it may have been updated since the original invoice.
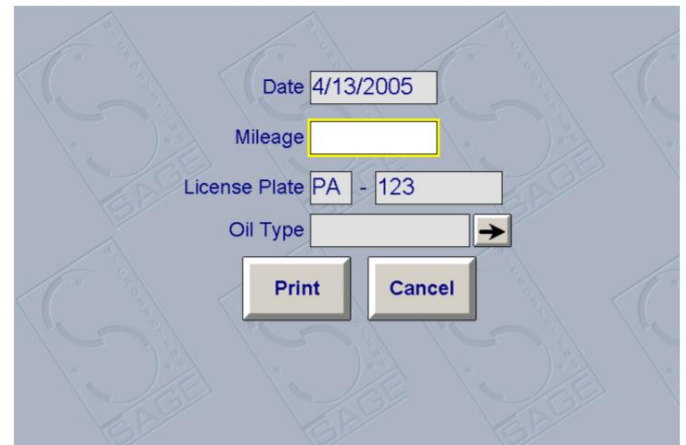
Voided or Refunded invoices will be marked as such if they are reprinted.

Print Generic Sticker

The Print Generic Sticker function allows you to print a sticker manually. This is useful for customer requests that are not based on the standard mileage recommendation.

When you enter this screen, the date defaults to 3 months hence. The state will also default. The license plate will be left blank, so you must type in the license plate number here. You will also need to indicate the oil type. The sticker will print the mileage that you enter on this screen. For example, if the vehicle has 10,000 miles and you want them to return in 5,000 miles, you will enter 15,000 miles here.
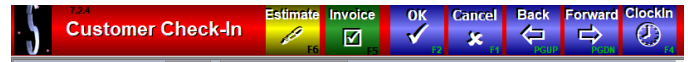
Estimate

The Estimate function allows you to create precise estimates for your customers. Once created, the estimate can be saved to the bay screen until the customer decides to have the work performed.

You can have the Estimate print exactly like your invoice format, or if you use preprinted forms, you can choose to print the estimate on an alternate plain paper style format, to save invoice paper. A customized note can be setup to print on every estimate and you can control the number of days that the Estimate will stay active before it's automatically deleted. These settings can be changed from the Estimate Setup screen in General Setup Options (8-2).

Estimate Methods

Bay Screen Method Allows you to start an estimate on the Bay Screen. You will see an Estimate button at the top of the page after customer information is complete. Pressing the button opens the Estimate page.

Cash Register Menu Method Allows you to start an estimate by selecting Cash Register Mode from the main menu and then selecting "Estimate". You can create a regular estimate like is created from the Bay Screen or you have the option to create an Express estimate that will bypass the entry of a license plate number or a name and requires a manual entry for vehicle information.

Note: All estimates added to the Bay Screen and identified saved to the Bay Screen and are identifiable with the notepad paper icon and green lettering.
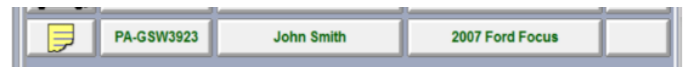
Converting Estimates to Invoices

If a customer decides to proceed with the work on an existing estimate, you can open the estimate by pressing the notepad paper icon. Click the Invoice button on the estimate page and you will be prompted to convert the Estimate to an Invoice.

Inventory Check

The Inventory Check function will provide you with current information about a stocked inventory item. This is useful for checking a part price or making sure you have the item in stock before recommending it to the customer. The inventory check includes the following information:

- Stock Number
- Description
- Item Group
- Price
- Carton Quantity
- On Hand Amount

If you do not know the stock number of an item, press the arrow button to view a list of your inventory groups. Choose the appropriate group and you can find your item.

Restore Invoice

Restore Invoice allows you to restore an invoice to the Bay screen after it has been printed and finalized. You can restore the last non-quick sale invoice or enter the invoice number (you can look this up in customer or vehicle history).

This function is most used in two situations:
- The invoice was paid with the wrong payment method (cash instead of check, say), which will result in a shortage on day end.
- The cashier forgot to put an item on the invoice – rather than voiding and redoing the entire invoice, you can restore the invoice and just add the additional item.

This function can also be used to correct technical information on the invoice, such as oil quantity, oil type, part number, service comments, etc.

Any restored invoices will be listed on the Exception report with the original dollar amount. This can be compared to the same invoice on the Daily Activity report to catch any discrepancies.

Note that a restored invoice will NOT remember coupons or discounts; these will have to be applied again.