Inventory and Service Management configuration is performed by the team technician. However, it is still necessary for you, the owner or manager, to have a full understanding of how to configure and maintain your inventory in the system, and how to manage your services to best serve your customers. The Inventory & Service Management menu presents the following options:

Inventory in QuickTouch

Organization of Inventory

All your inventory is divided into Inventory Groups. Thus, when you run an inventory report, you can choose to have your inventory listed by group – air filters, oil filters, bulk oil, impulse sales items, etc.

In addition, each inventory item is assigned a Vendor. This is the company from which the item was purchased.

Thus, before entering any of your inventory into the system, you will need a list of all your Inventory Groups, and for each Group indicate which Inventory Items belong to that group, and for each item, indicate the Vendor. Note that not all inventory in the same group is necessarily from the same Vendor.

In addition, for each Item, you will need to indicate the Cost (this is how much it cost you to purchase the item), and the Price (this is the price that you extend to the customer). Unfortunately, every market is different, so Sage cannot recommend or produce a price list for your inventory – your best bet for pricing suggestions is your local distributor. The average lube industry markup for inventory is 230%, but obviously this is highly variable depending on the items and market.

Certain items will be packaged by your distributor in multiples. For instance, a particular air filter might come in a package of 3, or an oil filter might come in a box of 12, bulk oil is delivered in gallons (4 quarts), and case oil is delivered in cases (12 bottles). Many distributors will require that when you place an order with them, that you indicate how many Cartons (Gallons, Cases, Packages, etc.) you want, not the actual count of the items. For each inventory item in your stock, you should indicate the package quantity.

Reordering Inventory

Finally, you will need to decide on how you want to reorder your inventory. There are several reordering methods supported in QuickTouch:

- Minimum-Standard Order
- Manual based on usage
- Automatic based on usage

Minimum-Standard Order For the Minimum-Standard based reordering method, you need to know how often you receive shipments. For instance, let's suppose a two-week usage period between reordering.

For each item, say, an air filter AF1, you want to define the Minimum stock level – this is the lowest level you want to keep on the shelf at any time, and if it falls below this level you want to reorder more of that item.

Then, you want to define your Standard Order – this is the number of items you want to reorder and put back on your shelf. The Standard Order should be high enough to service two weeks of vehicles (in our example), but not so high that you have extras sitting on the shelf for extended periods.

Finally, you have the Target level. The Target level is your Minimum + Standard. This is what you will start your two-week period with.

Let's take our air filter AF1 for example. Say, you want to start with 10 AF1 on Monday to be able to service all of your customers for the next two weeks. The following Wednesday, when you run the Reorder report, you have 3 left on the shelf. Since this is below your minimum level of 5, the system will calculate that you need to reorder 7 AF1 in order to get you to your target level of 10.

Finally, let's suppose that AF1 comes in packages of 3. In this case, since you need to reorder 7, QuickTouch will calculate that you need to reorder 3 packages, or 9 items.

Manual Based On Usage For this method, you simply run the Stock Sales report for the previous two weeks (or your time period), and then reorder only the parts that you used. That was easy! So why doesn't everyone use this method? Because this method is unable to anticipate future usage and inventory levels.

Automatic Based On Usage This method will have the computer calculate how many items to reorder based on the sales history of this item. QuickTouch will look back X number of days, determine how many of that item were sold during that period, and divide that into your reorder period. For instance, say you've sold 60 AF1 in the past 90 days, and you reorder every 14 days. QuickTouch will calculate that you need to reorder 9 AF1 to service your customers ($60 \div 90 * 14$) for the next two weeks. This method provides the best of both worlds, and because it's looking at the previous 90 days (or your time period) sales history, is able to predict trending

Inventory Group Maintenance

Inventory Group Maintenance allows you to add or remove inventory groups.

Item Groups Add/Select Page

After selecting Item Group Maintenance, you will be presented with a list of all available item groups.

If you are needing to add a new inventory item, make sure that the group and vendor for that item have already been added into the system.

Note the "Add" button on this screen that will allow you to add a new group to the list.

Also note the "Page 1 of X" indicator. If there is more than one page of groups, you can use the "Forward" and "Back" buttons to scroll through the screens.

Page 1 of 2

To save changes, press OK or CANCEL to close and not save.

To delete an item group, first delete its inventory (Inventory Item Maintenance) and remove the group from any service (Service Maintenance). Then press DELETE (top of page).

Item Group Enter a brief description of the group here.

Select the Order Select how inventory items in the group will be ordered. "By Number" can be used If sort number was assigned to items. (Normally used for Oils).

**Select Style** Determines what is displayed on the buttons when viewing item details. Stock is most common.

Assign to Business Group Used in the case of locations that have more than one business. Usually this will be blank.

General Ledger Accounts Defaults Used for QuickBooks.
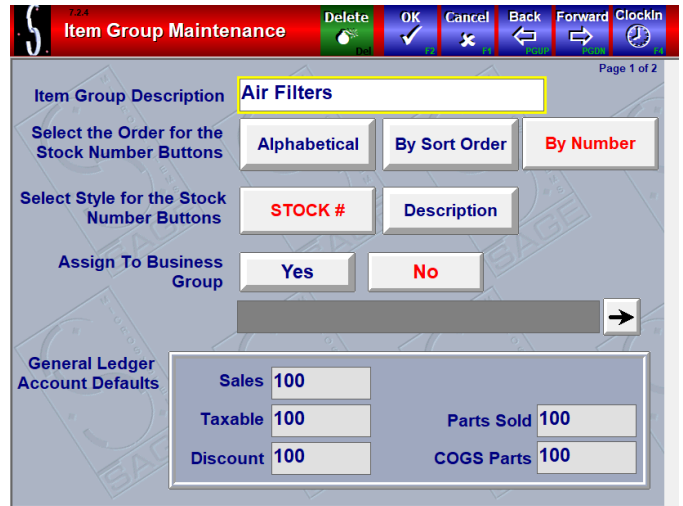
Page 2of 2

Outside Reference Manual QuickTouch incorporates the Motor (ChekChart) reference manual into the system and can supply the part number of various parts for many distributors based on the vehicle Year/Make/Model/Engine. Use this page to indicate a Primary and a Secondary manufacturer for this item group.
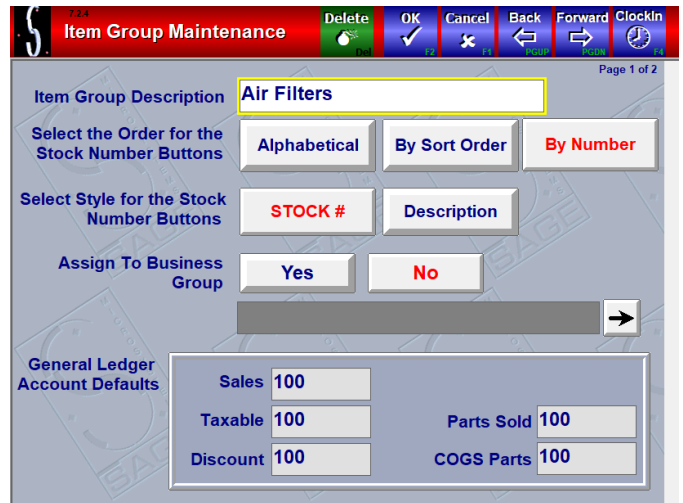
Inventory Item Maintenance

The Inventory Item Maintenance section is where you add, remove, or modify inventory items and their information such as prices or costs. Note that this is NOT where you go to restock inventory or adjust your on-hand amounts.

Item Group Selection Page

After selecting Inventory Item Maintenance, you will be presented with a list of all available item groups. If you are needing to add a new inventory item, make sure that the group and vendor for that item have already been added into the system.

Note the "Page 1 of X" indicator. If there is more than one page of item groups, you can use the "Forward" and "Back" buttons to scroll through the pages.

Item Add/Select Page

After choosing a group, you will be prompted with a list of the items already in that group, or if the group is empty, you will be prompted to add a new item.

Note the "Add" button on this screen that will allow you to add a new item to the list.

Also note the "Page 1 of X" indicator. If there is more than one page of items, you can use the "Forward" and "Back" buttons to scroll through the screens.
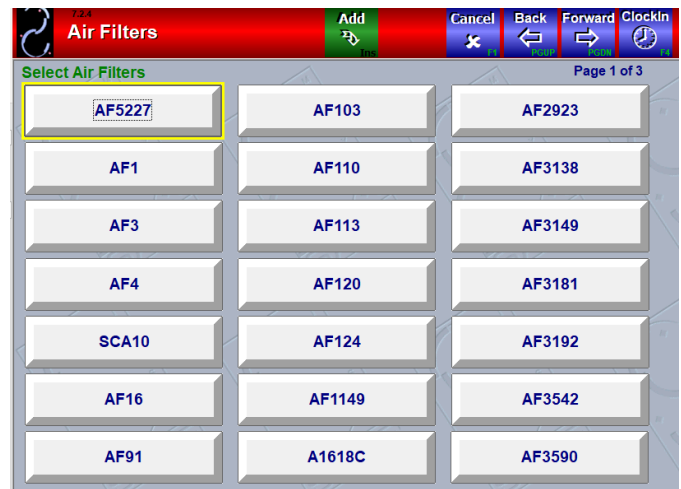
Page 1 of 4

To delete an item, select the item. The item Maintenance page will open. Click on the DELETE button at the top of the page.

Press OK to save changes or CANCEL to quit without saving.

The Next Button at the top of the page allows you to move directly to the next item, based on their onscreen sort order, without having to click ok and then find the next part.

Stock Number Enter a unique stock number for this item, any combination of letters or numbers. It should be short but descriptive, i.e. AF = Air Filter. It should match as often as possible the stock number of the manufacturer. Note that on the customer invoice, both the Stock Number and the Item Description are listed.
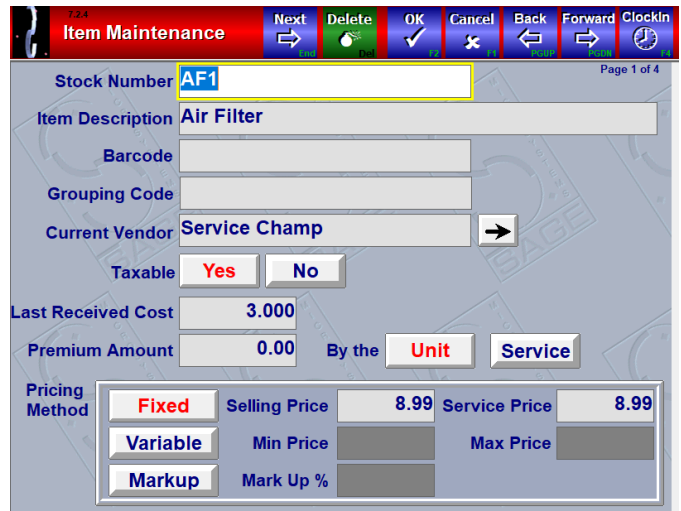
Item Description Briefly describe the item here.

Barcode The barcode (UPC) of an inventory item can be scanned into this field with a barcode reader. All look-up fields within QuickTouch will search both the Stock Number and Barcode fields.

Grouping Code Used for separating different types of items within the same item group on sales reports. (i.e., Bulk Oil, Blend Oil, Synthetic Oil, etc.)

Current Vendor Indicate the supplier for this item. If there are multiple suppliers, choose the most common one. You can modify the vendor when you're restocking inventory.

Taxable Yes or No. Almost always this will be Yes.

Cost This is YOUR cost, not how much you charge the customer. Of course, the cost of an item varies over time, but the QuickTouch Restocking function allows you to indicate the cost of the item each time it is received and will calculate your average costs over time for that item in various reports. For our purposes here, on this screen, just enter the cost of the item the last time it was received.

Upcharge Amount Used in situations where the item is normally included as part of the service, for instance, oil filters are normally included as part of an oil change service. However, certain individual items (for import or specialty vehicles) may cost more, and you wish to charge the customer extra for that item. This is the upcharge.

Pricing Method
Fixed is your usual choice here. This is the price that you charge the customer. Note that there is a Selling Price, and a Service Price. These are usually the same, the only time they would be different is if you charge a different (usually lower) price if the item is sold as part of a service. For instance, the air filter is normally $7.99 but is sold at $5.99 if part of a tune-up.

Variable will prompt the cashier for a price, this will not be used for most items.

Markup Allows QuickTouch to calculate the price of the item based on the cost. For instance, the item cost is $2.00, and your markup is 200%, then the selling price extended to the customer would be $6.00. This method is not commonly used.

Carton Quantity If the item comes in packages of more than one, indicate that quantity here. If you're not sure, use 1.

Example 1: Oil Filters – they are sold as singles but may be ordered (and received) as either singles, or cases of 12. In this case, the carton quantity would be 1 or 12.

Example 2: Air Filters – they are sold as singles but may be ordered (and received) as either singles, or in boxes of 3. In this case, the carton quantity would be 1 or 3.

Example 3: Bulk Oil – they are sold in quarts but received as gallons. The carton quantity would be 4.

Example 4: Bottled Oil – are sold in quarts but received as cases of 6 or 12. The carton quantity would be 6 or 12.

Example 5: Gear Oil/Transmission Fluid – are sold in pints but received as gallons. The carton quantity would be 8.

Example 6: 55 Gallon Drums – some "bulk" oils are shipped in 55-gallon drums. Since they are sold in quarts, and there are 4 quarts to a gallon, the carton quantity would be 220.

Unit Description Each, Quart, Gallon, Carton, Case, etc. Choose the best description for how this item is sold (i.e., bulk oil may be received in gallons, but it is sold in quarts, so choose quart here

Order Method *Fixed* allows you to enter a Minimum and Standard Order quantity. *Auto* allows you to enter the Average Days (this is the number of days in the past to look for sales history) and Days To Order (the number of days in your reorder period). These are usually 90/7 or 90/14.

Display Sort Order Items will be listed either numerically (AF1, AF3, AF200…) or alphabetically (AF1, AF200, AF3, BR1…), unless you indicate a sort order. This is normally used only for your Oils. The sort method for any particular group is configured under Inventory Group Maintenance.

Charts These charts are informational, so you can get a quick look at how popular a particular item is.
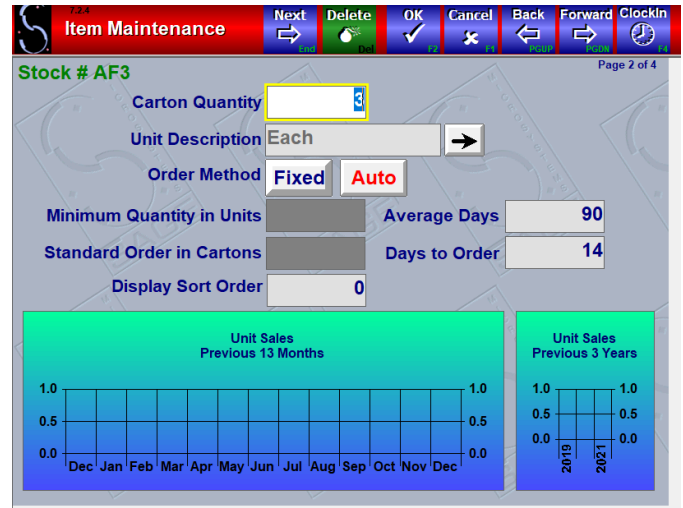
Page 3 of 4

Special Pricing Categories Each fleet account can be assigned to a particular pricing category and will then automatically receive discounts or markups on those items or services. In the screenshot example, all "A" fleet accounts receive a $2.00 discount and "B" fleet accounts receive a three percent discount.

Skip Quantity Prompt for Part Sales This is normally NO. If you sell this item using the Part button on the Customer Invoicing screen, normally you will be prompted for the quantity sold. Saying YES here would turn that off.

General Ledger Accounts Used for QuickBooks.

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This screen allows for structured setup of tires based on the type, rating, warranty and other specifications of the tire. This can be used in conjunction with third-party tire programs

Service Management

Service Menu Page

After selecting Service Management from the Inventory & Service Management Menu, you will be presented with the Service Menu options.
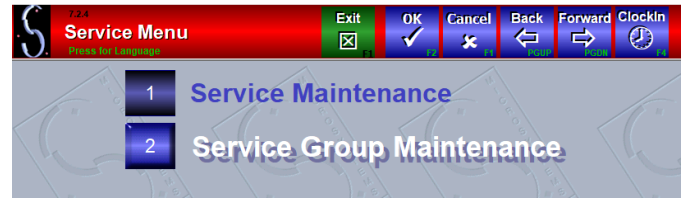
Service Group Maintenance (Loyalty Rewards Programs)

QuickTouch features a Loyalty Rewards Program to track the number of services a customer has purchased of a particular service type. You can then create a "nth Service Free" to offer a free service of that type after a pre-determined number of paid services. It allows you to reward loyalty.

Example: If all oil changes count towards a free one, which do you give the customer (oil and filter, LOF, Basic, Full, Synthetic, etc.). For this, there are 'Service Groups' which allow grouping of similar services. When the free service pops-up on the screen during customer processing, you will see all actual services sold that lead up to the free one. You can set which service will be the free one or you can allow the operator the opportunity to decide which service, of all the services in the service group, you will now offer as the free one.

You can also edit the current count in Customer Maintenance. Void and Restore Invoice functions set the values back to the correct level. The laser invoice types 'Graphics' and 'Pre-Printed Laser' will print a message under the services sold showing the number remaining before a free service will be available.

Service Group Add/Select Page

After selecting Service Group Maintenance from the Service Menu, you will be presented with a list of all available service groups.

Note the "Add" button on this screen that will allow you to add a new service group to the list.
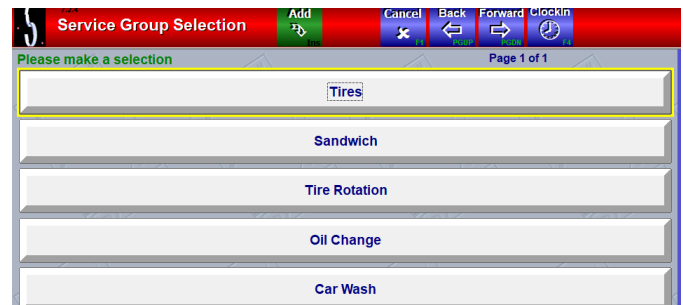
Service Group Page 1 of 1

To save changes, press OK or CANCEL to close and not save and to delete a service group, press DELETE (top of page).

Service Group Name: Type a description of the service. (i.e., ''Oil Changes", "Car Washes).
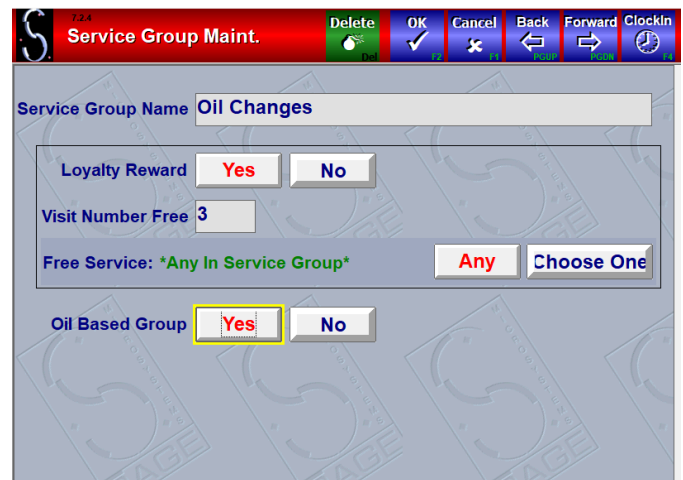
Loyalty Reward Activates the service group.

Visit Number Free The number of services required for the customer to purchase before receiving a free one.

Free Service
*Choose One a*llows you to specify whether there is a specific service that is the free one.

Any Service Allows any service to be given as the free one.

If for *specific service*, it will always be the free one, If a more expensive service (in the group), the system will ask for confirm that the free service will be applied and discount the more expensive service by the amount of the free one.

A customer's current count towards a free service can be manually adjusted in the customer record by going to Customer Management, Customer Maintenance.

Service Maintenance

Service Maintenance allows you to add or remove Services.

Service Add/Select Page

After selecting Service Maintenance from the Service Menu, you will be presented with a list of all available services.

You will be prompted with a list of your Services. Choose the appropriate Service.

Note the "Add" button on this screen that will allow you to add a new service to the list.

Also note the "Page 1 of X" indicator. If there is more than one page of services, you can use the "Forward" and "Back" buttons to scroll through the screens.

Page 1 of 7

To save changes, press OK or CANCEL to close and not save.

To delete a service, press DELETE (top of page).

Service prices can be divided into Parts and Labor. Useful for localities that do not charge tax on the full-service price.

Example: If a service is $32.99, it may be $12.00 in parts and $20.99 labor, of which only the $12.00 would be taxable. If the total price of the service is taxable, you can simply type the entire amount into the Parts price, or you can still separate out the parts and labor portions.

Service Name Type a description of the service.

Parts Pricing Method The Parts component of the total service price can be priced using several methods:

Fixed means that the parts price will be the same for all vehicles (generally for most services).

Variable will prompt the cashier for how much to charge the customer (generally not done).

Actual Parts charges the customer based on the actual parts used during that service (this would be used for services such as Air Filter, Wiper Blade, Fuel Filter, PCV Filter, etc.).

Parts Taxable Yes or No. Indicates whether the parts component of the total service price should be taxed.

Labor Pricing Method The Labor component of the total service price can be priced using several methods:

Fixed means that the labor price will be the same for all vehicles (generally for most services).

Variable will prompt the cashier for how much to charge the customer. This would be useful for replacing a part such
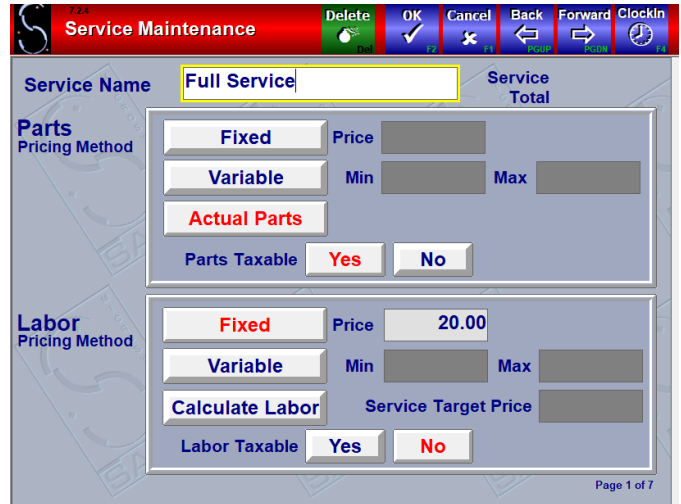
as a fuel filter or cabin air filter – the part itself may not be expensive but depending on where it is located on the vehicle, you might wish to charge for the service.

Calculate Labor / Service Target Price This advanced labor pricing method would be used in conjunction with the Actual Parts pricing method.

Example: You first set your Service Target Price. For instance, any 6cyl Tune-up, you might wish to charge a total of $69.99, no matter what you charge for the parts. This feature would calculate the total parts price, and subtract this amount from the Service Target Price, and this would be the labor charge). Note that this feature is grayed out unless you click Actual Parts under the parts section.

To delete a service, press DELETE at the top of the screen.

Press OK to save any changes, or CANCEL to quit without saving changes.

Page 2 of 7

This page allows you to assign parts, part categories, or other services to a service. Press the Add to choose a Part, Item Group, or Service.

When QuickTouch refers to a "Service", it is referring to the list of buttons that shows up when you press the "Services" button when creating a Work Order, Invoice, or QuickSale. Services might involve multiple employees and multiple inventory items or might be a simple as pouring a bottle of additive. Thus, there are several different types of services.

Part: For some types of services, you might wish to assign a particular part for that service. For example, a "3-Step Fuel System Flush" might include a 3-step kit. It's the same 3-step kit every time, so we don't need the lube technician to choose from a list, but we do want the item to subtract from inventory when the service is sold to a customer. This is what "Part" means on this screen.

Item Group: Another type of service would have parts associated with it, but the actual inventory item used might be different for any vehicle. For example, a Full-Service Oil Change – you include up to 5 quarts of oil and an oil filter, but you want the technician to indicate WHICH TYPE OF OIL and WHICH OIL FILTER were used in the vehicle. This is what "Item Group" means on this screen. By indicating an Item Group for the service, QuickTouch will know to prompt the cashier for the correct part number.

Services: A service might include other services, such as a "30,000 Mile Service" including an oil change, transmission flush, 3-step kit, etc. This is what the "Services" button means on this screen.

In the example in the screenshot, the Full-Service oil change has the Oil group and the Oil Filter group added to it.

Quantity Included In Price This is how many of the item is included in the price – if the vehicle uses more than this amount, then the customer will be charged extra, the "Service Price" associated with the particular inventory item.

Extra Labor This will charge extra labor if the vehicle exceeds the Quantity Included amounts. There are various methods to compute the extra labor, Xquan and X1. Xquan will charge the Extra Labor Amount for each item over the Quantity Included. X1 will charge a one-time fee no matter how much the Quantity Included is exceeded.

Ask For Quantity will prompt the technician for how many of the item was used.

Default Number From Last Visit On the customer's next visit, this will let the computer remember which part and the quantity of that part used on a previous visit.

Ask For Stock# or Pop Up List The Ask setting will allow the technician to type in the part number, or allow Chek-Chart to suggest the correct part number. This should be used for Air Filters, Oil Filters, PCV, or Breather, as the Chek-Chart database tracks these parts. It can also be used for item groups like serpentine belts, where it would be easier to just type in the part number than scroll through a list of belts. The Pop-Up setting would be used for groups that are not tracked through Chek-Chart, or where it's easier to view a list than to type in a part number, as in the Oil inventory group.

Required This will force the technician to choose something from the list. Otherwise, if not required, the technician can cancel that part. Generally, all parts should be required, except in the case of maybe a Tune Up, where you can list all the different parts that the technician checks but he might not replace all of them (wires, etc.).

Pop Up List At Check In This is used for parts where the customer might have a preference, as in Oil. Generally, this would be left at NO for any other item group.

Display Sort Order Allows you to sort your list of services into a particular order.

Allow Quick Sale Allows you to disable this service from being sold through Quick Sale. Quick Sale allows you to invoice a customer without going through the customer and vehicle information screen, and does not produce a Work Order or checklist. Thus, you generally don't want any type of vehicle service to be sold through Quick Sale, only items such as impulse items (air fresheners, soda, etc).

Use Checklist You can assign up to 3 20-point checklists to each service.

Use Miscellaneous Charge You can assign up to two miscellaneous charges, such as Environmental Fee, to any service. Note that the Miscellaneous charges have the same tax status as the Labor tax status on page 1.

Assign To Business Group Assigns a service to a particular Business Group if business groups are configured.

Special Pricing Categories Each fleet account can be assigned to a particular pricing category and will then automatically receive discounts or markups on that item or service. There are three pricing categories: A, B, and C. You can configure a different discount or markup for each pricing category and specify a discount or markup, whether it is a fixed dollar amount, or a percentage amount.

Screenshot example: all "A" fleet accounts receive a $10.00 discount, all "B" accounts receive a 5% mark-up, and all "C" accounts get a 5% discount.

See the Fleet Account Management section for more information on using Special Pricing Categories.

General Ledger Accounts Default Used for QuickBooks.

Export Service Code This field is used by other computer service vendors to interface with QuickTouch. For example, MailMark is a company that provides reminder card services, and this allows them to create an export file to print your reminder cards. Generally this is left blank unless you contract with one of these outside vendors.

ChekChart Service Codes This allows QuickTouch to interface with the Chek-Chart database of manufacturer recommended services. Basically, you have to match up as best you can your service with the Chek-Chart list of services. In this example, we matched our "Full Service" QuickTouch service with the "Engine Oil Change" Chek-Chart Service.

SPECIAL NOTE For oil changes, manufacturers may recommend an oil change interval of 3,750 miles (Nissan

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Frontier 4cyl is an example) and this interval would print on the invoice, which obviously would conflict with the lube industry standard of 3000 miles, so some lube shop owners choose to leave this field blank for any of the oil change services.

By associating your list of services with the Chek-Chart recommended services, QuickTouch can print on the customer's invoice the recommended service interval, and if they've already had that service at your shop, the next scheduled service date/mileage.

Suppress Checklist When Used As A Service Within Another Service Generally this is set to NO. The Yes option would only be used in a service like the 30,000 Mile Service, which includes multiple services which may have multiple checklists associated with them. Thus, you could use a single large checklist to cover the multiple services (the check points would all appear on one page) as opposed to having several individual checklists (these would all appear on separate pages).

Ask For Employees This allows the cashier to enter one or two employees who performed this service. This is useful for shops that award commissions when the employees performing certain services may not be the same as the Upper and Lower technician positions. The results of this are listed on the Employee Service report. Generally this will be NO.

Work Order Type Does this service produce a work order when assigned from the Work order screen checking in the vehicle? Usually yes, so the Work order button is generally selected. I can't think of any examples of a service that would not require a work order. Work slip is used for carwashes where you wish to produce a "Please Pay Inside" type of receipt.

Invoice Type Standard is usually what you choose here. Receipt would only be used in carwashes.

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Service Group This allows you to create "Buy X Get 1 Free" type promotions. If you press "Choose One" you will be presented the following screen.

Gift Card Service Yes or No. Please see the Gift Cards/Gift Certificates section of this manual on page 208.

Ask For Certificate Number This enables an additional pop-up screen upon selling the service which allows the user to input a certificate number. This can be used for tracking things such as state inspection stickers or smog certificates. There are two reports pertaining to the collect certificate numbers that can be found under the inventory reporting menu.

Certificate Number Required Specify whether the certificate number must be entered to proceed.

Certificate Number Must Be Unique Specify whether the certificate number entered must be unique or not.

Labor Description (CA compliant invoices only) An additional description field added to the invoice which explains the service to which it is attached.

Labor Description Editable at Checkout? Specify whether the Labor Description can be edited or not.

Automatically Pop Up Labor Description? Specify whether the Labor Description pops up for user confirmation each time a service is added to the blue screen.

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Repair Interface Service Code (Also referred to as the Epicor Job Code) is used to associate a particular service with a Job Code to streamline the Epicor Integrated Service Estimating feature. If a service is linked to a job code, when you launch into ISE, it will take you directly to the appropriate job tab without having to reselect the job which you are estimating. Services can also be linked to a Job Group. The Repair Interface Service Code and Job Group is also used for linking the Epicor services back to the appropriate service, which simplifies and enhances the report tracking capabilities of QuickTouch.

History Code A 2 or 3 digit identifier for Service Names to be used on specific Invoice Types.

Prompt for Epicor Interface If No, when selling this service it will launch you directly into Epicor ISE. If Yes, the system will ask you whether to launch into ISE, or to proceed to sell service through QuickTouch.

Use Which Labor Rate You can choose either Epicor, QuickTouch or Ask. If set to Ask, the system will prompt you each time you sell the service to use the built in Epicor Labor amounts or the QuickTouch Labor amount that is setup on page 1 of Service Maintenance.

Use Which Labor Description Either Epicor's built-in description, or the customizable description that is setup on page 6 of Service Maintenance.

Show Labor Rate and Hours in Description (only visible if Epicor Labor Description is selected) The Epicor Labor Rate and Hours are included in the Epicor Labor Description, however some shops don't wish to show that information, so this can be omitted by selecting No.

Mileage on Invoice Required Specify whether the mileage is required when selling this service or not. If mileage is not required on this service but is sold with another service on which it is required, the system will require the mileage.

Vendor Management

Vendor Menu Page

After selecting Vendor Management from the Inventory & Service Management Menu, you will be presented with the Vendor Menu options.

Vendor Maintenance

Vendor Maintenance allows you to add the distributors of your inventory to the system.

Vendors Edit/Add Page

After selecting Vendor Maintenance from the Vendor Menu, you will be presented with a list of available vendors.

Note the "Add" button on this screen that will allow you to add a new vendor to the list.

Also note the "Page 1 of X" indicator. If there is more than one page of vendors, you can use the "Forward" and "Back" buttons to scroll through the screens.

Page 1 of 3

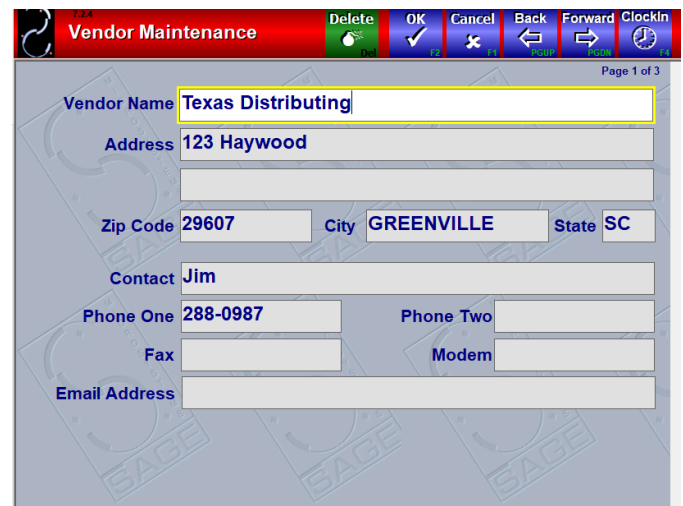To save changes, press OK or CANCEL to close and not save.

To delete a vendor, press DELETE (top of page).

Vendor Name Required.

Address, Zip Code, City, State, Contact, Phone One Optional, but useful if you use the Purchase Order feature.

Phone Two, Fax, Modem, Email These fields are optional

Page 2 of 3

Order Method This option is for your information only, it does not have any effect in QuickTouch.

Modem Script is disabled unless the Modem Order Method is selected. This field is informational only, it does not have any effect in QuickTouch.

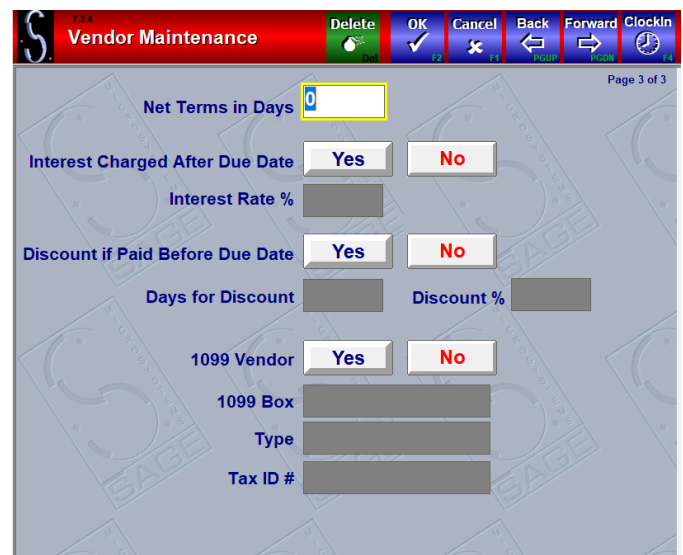**General Ledger Accounts** This is used only with the QuickBooks interface.

Purchase History These charts will display purchase history for this vendor for the previous year and the previous 3 years.

Page 3 of 3

These fields are all informational only and have no effect on any other area of QuickTouch.

Create/Edit Purchase Order

Purchase Orders allows you to create a reorder report for a particular vendor, make any changes to it, print, and save it. When the inventory is received, you can then post the entire purchase order to your inventory, rather than having to restock each item individually.

Vendor Selection for PO

After selecting Create/Edit Purchase Order from the Vendor Menu, you will be presented with a list of available vendors.

Note the "Page 1 of X" indicator. If there is more than one page of vendors, you can use the "Forward" and "Back" buttons to scroll through the screens.

You will be prompted if you wish to reset any negative inventory numbers to 0 – Choose Yes or No. If there are any outstanding Purchase Orders, you can choose one of them at this point or Add a new one. If no Purchase Orders exist, you will be prompted to create one. At this point the Purchase Order is created as shown in next screenshot.

Purchase Order

For each inventory item assigned to this Vendor, it lists the Part Code, Description, Cost, On-Hand Amount, and the Suggested Order Quantity in Cartons (so if AF3 comes in packages of 3, it will be reordering 2 packages here, for a total of 6 AF3).

Note that you can edit the Cost and Quantity fields. If you don't wish to reorder a certain part, just put a 0 in the quantity.

At this point you can Print and Save the Purchase Order, at which point a PO# will be assigned. Pressing Cancel at this point will discard the PO.

After printing or saving the PO, you can return to this screen to edit it (in the case that an item is backordered).

Post Purchase Order

After restocking inventory from your purchase order, you may find that an item was not shipped and now your inventory is off. With the Restore Purchase Order feature you are able to restore a posted purchase order just as you would an invoice to correct a mistake.

Vendor Selection for PO Posting

After selecting Post Purchase Order from the Vendor Menu, you will be presented with a list of vendors. Choose the needed vendor.

If there are any outstanding Purchase Orders, choose the appropriate one. If no Purchase Orders exist, you will be notified. After selecting a Purchase order to post, you will be presented with the Post Purchase Order page.

Post Purchase Order Page

Note that you can edit the Cost and Quantity fields. If a particular item was not shipped or backordered, just put a 0 in the quantity, or the quantity is different, make the correction here.

Press OK at the top of the screen and then Yes n the popup window to post the Purchase Order. All the inventory will be restocked into your system automatically. After posting, you will be asked if you want to print an inventory restocking report.
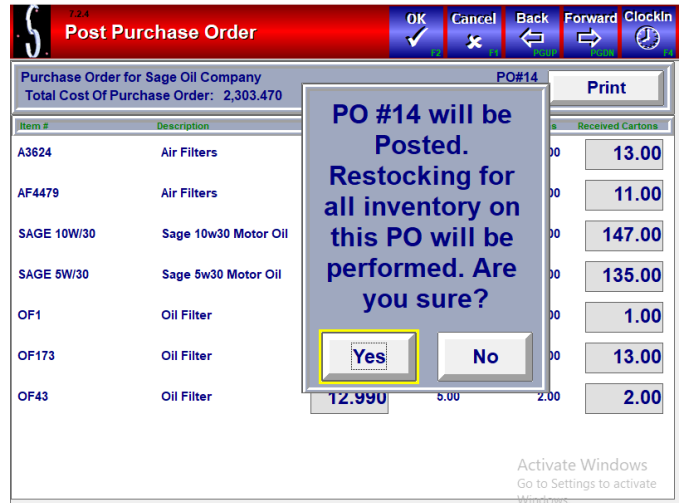
Restore Purchase Order

After restocking inventory from your purchase order, you may find that an item was not shipped and now your inventory is off. With the Restore Purchase Order feature you are able to restore a posted purchase order just as you would an invoice to correct a mistake.

Vendor Selection for Restore PO Page

After selecting Restore Purchase Order from the Vendor Menu, you will be presented with a list of vendors. Select the needed vendor.

Depending on the security settings, you may be prompted to enter your code and password.

Note: If this is your first time using this feature, you may need to allow your security group to have access to restore purchase orders.

Restore PO Selection Page

After entering your code and password, you will see all the purchase orders that were posted today. You may only restore a purchase order the same day it was posted. You may receive a message saying, "Error No Recently Posted PO's Found," which indicates no purchase orders are available to be restored.
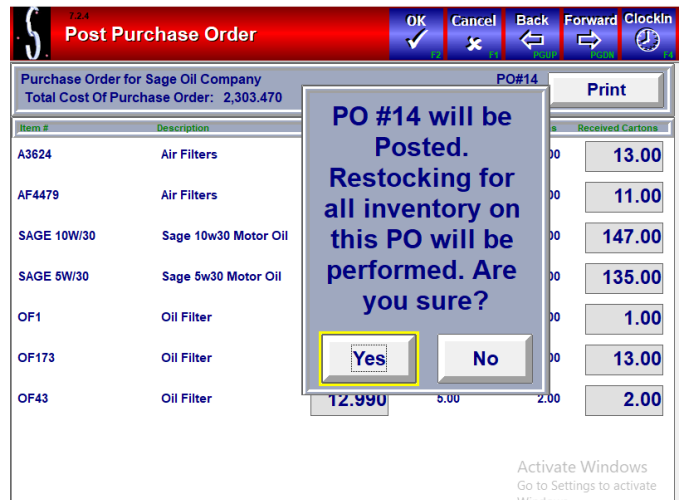
Post Purchase Order Page

After selecting a purchase order, you can edit the Cost and Quantity fields. If a particular item was not shipped or backordered, just put a 0 in the quantity, or the quantity is different, make the correction here.

After selecting the purchase order to restore, you will be asked if you want to restore this purchase order.

If you choose "No" it will take you back to the selection screen to pick another purchase order to restore.

If you choose "Yes," the system will restore the purchase order and bring you to the "Post Purchase Order" screen. You can then make any necessary changes and repost the purchase order.

Reprint Purchase Order

After selecting the purchase order you want to restore, you will be asked if you want to restore this purchase order. If you choose "No" it will take you back to the selection screen to pick another purchase order to restore. If you choose "Yes," the system will restore the purchase order and bring you to the "Post Purchase Order" screen. You can then make any necessary changes and repost the purchase order

Vendor Selection for Restore PO Page

After selecting Reprint Purchase Order from the Vendor Menu, you will be presented with a list of vendors. Select the needed vendor.

Restore PO Selection Page

After selecting a vendor, you will see a list of purchase orders that have been posted for this vendor.
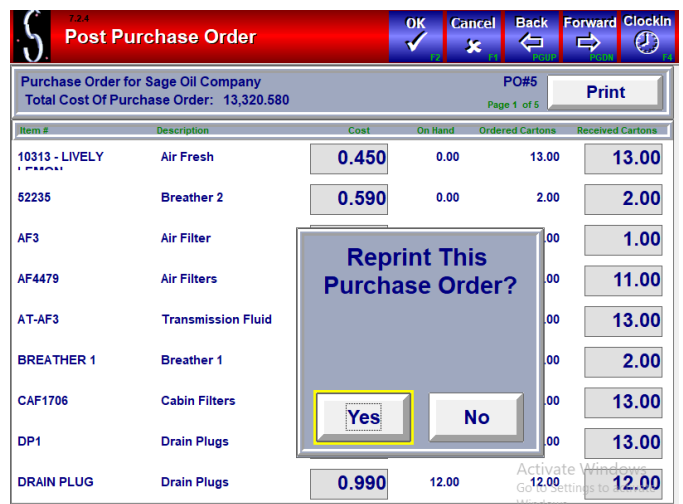
Post Purchase Order Page

After selecting a purchase order, you will be prompted to reprint this purchase order.

"Yes" will reprint the purchase order and

"No" will not reprint the purchase order. Selecting either option will return you back to the Reprint PO screen.

Check List Maintenance

QuickTouch allows you to configure as many check lists for your services as needed. Check Lists are the "20 Point Check" that are generally included with full-service oil changes. Check Lists can be created for any other service, and you can assign two check lists to a particular service.

Check List Selection Page

After selecting Checklist Maintenance, you will be presented with a list of check lists.

Note the "Add" button on this screen that will allow you to add a new Check List to the list.

Also note the "Page 1 of X" indicator. If there is more than one page of checklists, you can use the "Forward" and "Back" buttons to scroll through the screens.

Check List Add/Edit Page

To delete the entire Check List, press DELETE (top of page).

To save changes, press OK to save or CANCEL to quit without saving.

The first page of the Check List allows you to add, change or remove check points.

To add or change a check point, just type in the description in a blank box.

To remove a check point, just erase the description. When you click OK and go back in, you will see that check point is gone and any below it has moved up a row.

To change the actions for a check point, press the right arrow. You can have up to six actions for each check point.

Check List Options Window

Ask Questions? Pressing the ? button, allows you to configure a question for the technician for the check point.

When checking out a vehicle and that that action is selected by the technician for the check point, the technician will be prompted with the question. The information he types in will appear on the invoice.

In the screenshot example the technician will be prompted for a reason why he can't check the Front Differential fluid.

Default if Service is sold Associates a service to a particular check point option. Press the "No" button next to the Action that will be default Action and select service.
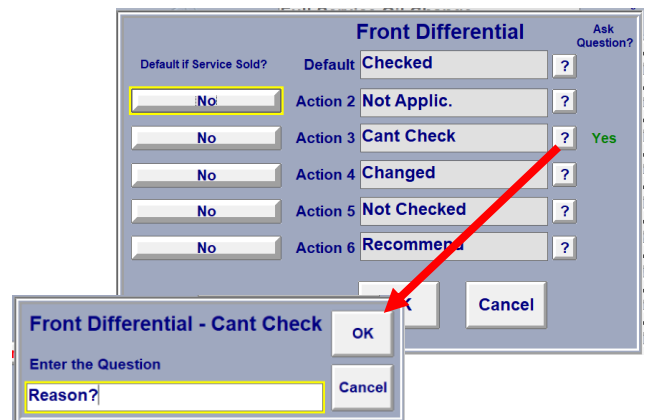
Inventory Functions

Inventory Functions Menu

After selecting Inventory Functions from the Inventory & Service Management Menu, you will be presented with the Inventory Functions options.

Inventory Restocking

When you receive a shipment of inventory, you will want to restock it into your system.

If you used the Purchase Order feature to create a purchase order for your inventory, you can use that feature to restock your inventory. If you used any other ordering method, you would need to restock using the QuickTouch restocking feature.

OK and Cancel on this screen perform the same function, in that they both exit you out of the Restocking function. Both buttons will save any work you have done. You will be prompted if you want to print a report, you don't need to print a report every time, as you can reprint the restocking activity from the Inventory Reports menu.

Page 1 of 1

To restock inventory, type the stock number and hit Enter. You can also use the arrow to select your inventory item from a list, use the arrow if you are not sure what the stock number is.

When QuickTouch finds the stock number in the system, it will present you with the following information:

- Stock Number
- Description
- Item Group
- Cost
- Price
- Carton Quantity
- On Hand
- Received

You can restock an item either by Carton or by Unit. If you have the Carton Quantity indicated for the item you can use cartons, but otherwise you will have to use Units.

If you are not sure, use Units, and indicate how many individual items (as in unpacking the carton and counting everything).

Whether you indicate the Cartons or Units received, you will see the On Hand level change automatically to what the

new level will be. At this point you can change the Cost or Vendor, and you can indicate an invoice number or description.

Note also the "New Price" and "Svc Price" fields. These correspond to the Selling Price and Service Price fields for that item in Inventory Item Maintenance. If the cost increases for this item, you have the option to increase the retail prices at this time. Generally, the Selling Price and Service Price are the same value, they are only different if you sell the item at a reduced cost if not part of a service.

After an item is restocked, it will show in the blue area below the restocking section. You can double-check your work here.

Inventory Adjustments

If you make a mistake restocking inventory or find a discrepancy with your on-hand amounts (between what the system indicates and what is actually on the shelf), you will need to do an Inventory Adjustment

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OK and Cancel on this page perform the same function, in that they both exit you out of the Adjustment function. Both buttons will save any work you have done.

You will be prompted if you want to print a report, you don't need to print a report every time, as you can reprint the adjustment activity from the Inventory Reports menu.

To adjust inventory, just type the stock number and hit Enter. You can also use the arrow to select your inventory item from a list, use the arrow if you are not sure what the stock number is.

When QuickTouch finds the stock number in the system, it will present you with the following information:

- Stock Number
- Description
- Item Group
- Cost
- Price
- Carton Quantity
- On Hand
- Received

Indicate the actual On-Hand Units that you want the system to have. You can provide an adjustment description. You will see the On Hand level change automatically to what the new level will be.
After an item is adjusted, it will show in the blue area below the adjustments section. You can double-check your work here.

Transfer Inventory

Inventory can be transferred from one location to another (multiple center operators only).

Page 1 of 1

To transfer inventory, you need to select the shop in which the inventory will be transferred to, the Stock number or numbers in which you are transferring and the quantity being moved.

Once completed, click OK, and the system will print a packing slip to be sent with the inventory items to the other shop. A unique Transfer Code will be generated on the packing slip. This transfer code will be required when receiving the transfer at the other location. (See Receiving Transfer)

Receive Transferred Inventory

To receive transferred inventory from another shop, you will need the Inventory Transfer Packing Slip that was created at the other shop at the time of the initial Inventory Transfer.

Page 1 of 1

Transfer Code The unique transfer code is used as a security check to ensure that the same inventory that left the other shop is what is being received at this location.

Cancel Inventory Transfer

To cancel an Inventory Transfer that you've created, click on any of the pending transfers, and then touch "Yes".

Reprint Inventory Transfer

To reprint an Inventory Transfer that you've created, click on any of the pending transfers, and then press Yes.

Inventory Reporting

Inventory Reporting allows you to view and manage all inventory activity in your shop.

Inventory Reporting Menu

There are 17 reports available in Inventory Reporting and are listed across three pages.

To go to the next page, press the "Inventory Reporting X" at the bottom of the page or the forward arrow at the top of the page.

Report Options Page

Most reports will ask for a date or date range.

In addition, some reports will ask for various sorting and grouping criteria.

If a report will be showing a list of stock numbers, you will be able to group the stock numbers either by Inventory Group (air filters, oil filters, etc), or by Vendor (all parts assigned to a particular vendor).

You will also be able to sort the item lists either Alphabetically, Numerically, or by Sort Order.

Page 1 of Reports List

1. **Item Listing Report** Lists inventory item details for each stock number.
2. **Inventory Value Report** Lists the on-hand amounts and retail values for each stock number. The last page of the report will summarize by inventory group and vendor the total retail dollar amount on hand. Note that this report lists the CURRENT value, if you need the value for a previous date use the Inventory Value Snapshot report.
3. **Inventory Worksheet** Lists all stock numbers in the system and provides a worksheet to count the items on the shelf. This is used (generally) monthly or quarterly to verify that the quantities on hand match what are in the computer. Any discrepancies can be fixed (and reported) using Inventory Adjustments. There is an option to print the computer on-hand amount for each item on the report, some owners choose not to show this information on the worksheet because it's the "answer".
4. **Stock Reorder** Report Lists by vendor or item group all items that need to be reordered, based on the ordering method for each item (Minimum-Standard Order, or Automatic).
5. **Vendor Listing Report** Lists all Vendors and contact information.
6. **Stock Sales Report** Lists all stock items sold in the date range grouped by item group, the quantity sold, cost and selling prices, and markup and profit percentages. This report can also be chosen to show the Slowest or Fastest selling inventory.

7. **Service Listing Report** Lists all services and price breakdowns configured in QuickTouch.

Page 2 of Reports List

1. **Non-Service Labor Detail Report** This report lists all "Miscellaneous Labor" or "Labor On The Fly" sales. These sales are done using the Labor button on the blue invoicing screen.

2. **Non-Service Parts Detail Report** This report lists all "Parts On The Fly" sales. These sales are done using the Parts button on the blue invoicing screen.

3. The "Parts On The Fly" and "Labor On The Fly" features allow technicians to enter miscellaneous services or outside parts onto the invoice, but rather than just using a "Misc. Service" service, these features allow the technician to type detailed information for each transaction. This can help the owner/manager determine which outside parts are used often enough to carry them in stock, or which miscellaneous services are being offered enough on a regular basis to start advertising.

4. **Inventory Value Snapshot** This report is the same as the Inventory Value Report, but you can see the value on a particular day in the past – the other report is the CURRENT value.

5. **Inventory Restocking Report** Lists all inventory restocking activity for the date range.

6. **Inventory Adjustment Report** Lists all inventory adjustment activity for the date range.

7. **Inventory Transfer Report** Lists all inventory transfers for the date range.

8. **Inventory Reconciliation Report** Lists all inventory changes for the date range.

Page 3 of Reports List

1. **Certificate Activity Report** Lists certificate activity for the date range. This needs to be turned on in each service needed. Example Smog.

2. **Certificate Omission Report** Lists certificate omissions for the date range. This needs to be turned on in each service needed. Example Smog.

3. ***Epicor Ordered Parts**