# QuickTouch: System Management

**System Management** provides various functions for configuring your QuickTouch system to best match your individual site requirements. System Management also contains computer utilities and special Sage administrative options. System Management consists of five sections:


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# Cash Register Maintenance

**Cash Register Menu Page**

After selecting Cash Register Maintenance from the System Management menu, you will be presented with a list of CR Maintenance Menu options to choose from.

# Coupon Maintenance

"Coupons" and "Discounts" have two different functionalities. Coupons are dollar-off amounts, and Discounts are percentage-off amounts. Coupon Maintenance is the area you go to add, remove, or modify coupons you will accept. Coupons can be either for a fixed dollar amount or can prompt for a cashier entered amount.

There are tax considerations when applying coupons. In QuickTouch, the sales tax can be applied before or after the coupon. This option is set under Tax Setup in General Setup Options.

This selection is important because many taxing authorities require that tax be paid on the full amount of the service – thus, the tax is applied before the coupon. For example, if a service is $25.99, with 6% tax and a $2 coupon:

| **Tax Before Coupon** | | **Tax After Coupon** | |
|---|---|---|---|
| Sale | $25.99 | Sale | $25.99 |
| | | Coupon | -$2.00 |
| Subtotal | $25.99 | Subtotal | $23.99 |
| Tax 6% | $1.56 | Tax 6% | $1.44 |
| Coupon | -$2.00 | | |
| Amount Due | $25.55 | Amount Due | $25.43 |

Note that the difference here for one transaction is small – 12¢. The danger for the business owner using the Tax After Coupon method is that an audit will require that the difference be paid for every invoice for several years. So, a shop that does 10,000 vehicles per year, owing 12¢ for 7 years, would owe $8400 in back taxes.

**Coupon Selection Page**

From the Main Menu, choose System Management, Cash Register Maintenance, Coupon Maintenance. You will be prompted with a list of your coupons. Press on a coupon to edit that coupon.

Note the "Add" button on this screen that will allow you to add a new coupon to the list and the "Page 1 of X" indicator. If there is more than one page of coupons, you can use the "Forward" and "Back" buttons to scroll through the screens.

View a report of coupons in the Coupon Analysis report.

**Page 1 of 2**

To delete a coupon, go into that coupon, and press the green DELETE button at the top of the screen. When you're viewing a coupon, press OK to save any changes, or CANCEL to quit without saving changes.

**Coupon Name** This is the internal name of the coupon that the employees will know and what will print on reports.

**Coupon Description N**ame that prints on the customer's invoice.

**Display Sort order** Position the coupon will appear on coupon list.

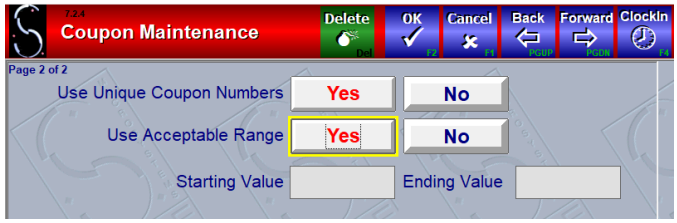
**Prompt for Coupon Amount** NO for a fixed amount coupon, YES if you want the cashier to be prompted for the amount. Dollar Amount If the Prompt setting is NO, you can enter the dollar amount of the coupon.

**Barcode** This field is used when you scan your coupons instead of selecting them from the screen. For QuickTouch to recognize a scanned coupon, the barcode must be scanned into the barcode field in Coupon Maintenance.

**Must be Complete Scan** When this option is set to Yes, the scanned coupon's barcode must exactly match the text in the barcode field in Coupon Maintenance. QuickTouch will not accept the coupon if the barcode does not match.

**Use Start/End Date** Specify whether a coupon has a beginning and ending (expiration) date. The coupon cannot be used outside of these dates if enabled.

**Page 2 of 2**




**Use Unique Coupon Numbers** This option gives you the ability to accept unique coupon numbers at check out. With the unique numbers turned on, you cannot cash out a customer with a unique coupon code that has already been used on another invoice. Using Unique Coupon Numbers will prevent the system from accepting one coupon on multiple occasions.

**Use Acceptable Range** Allows you to set a range of unique coupon numbers to use in the system, preventing one coupon from being redeemed on multiple occasions. In our example above we have a starting value of 100 and an ending value of 500 to use as unique coupons numbers. When a customer uses a coupon, you will be asked to enter the coupon number. Once the coupon number is used, it cannot be used again.

# Discount Maintenance

In QuickTouch, “Coupons” and “Discounts” have two different functionalities. Coupons are dollar-off amounts, and Discounts are percentage-off amounts.

Discount Maintenance is the area you go to add, remove, or modify discounts you will accept. Discounts can be either for a fixed percentage amount or can prompt for a cashier-entered amount.

There are tax considerations when applying discounts. In QuickTouch, the sales tax is applied after the discount is calculated. For example, if a service is $25.99, with 6% tax and a 10% discount:

| **Tax After Discount** | |
|---|---|
| Sale | $25.99 |
| Discount 10% | -2.60 |
| Subtotal | $23.89 |
| | $1.40 |
| Amount Due | |
| | $25.39 |

QuickTouch does not support a “Tax Before Discount” option, as it does with Coupons.

From the Main Menu, choose System Management, Cash Register Maintenance, Discount Maintenance. You will be prompted with a list of your discounts. Press on a discount to edit that discount.

Note the “Add” button on this screen that will allow you to add a new discount to the list.

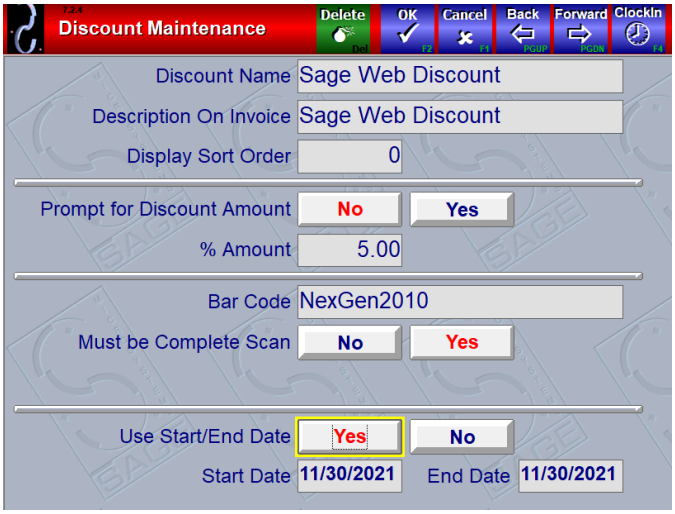
Also note the “Page 1 of X” indicator. If there is more than one page of discounts, you can use the “Forward” and “Back” buttons to scroll through the screens.

If you wish to delete a discount, go into that discount, and press the green DELETE button at the top of the screen.

When you’re viewing a discount, press OK to save any changes, or CANCEL to quit without saving changes.

You can view a report of your discounts in the Discount Analysis report. From the Main Menu, choose Marketing Management, Discount Analysis.

**Page 1 of 1**




**Discount Name** This is the internal name of the discount that the employees will know and what will print on reports.

**Discount Description** This is the ‘friendly’ name that will print out on the customer’s invoice.

**Prompt for Discount Amount** NO for a fixed amount discount, YES if you want the cashier to be prompted for the amount.

**% Amount** If the Prompt setting is NO, the user will be asked for the discount amount at check out.

**Barcode** This field is used when you scan your discount coupons instead of selecting them from the screen. For QuickTouch to recognize a scanned discount coupon, the barcode must be scanned into the barcode field in Discount Maintenance.

**Must be Complete Scan** When this option is set to Yes, the scanned discount coupon’s barcode must exactly match the text in the barcode field in Discount Maintenance.



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QuickTouch will not accept the discount if the barcode does not match.

**Use Start/End Date** Specify if a discount has a beginning and ending (expiration) date. The discount cannot be used outside of these dates if enabled

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# Advertising Maintenance

Advertising Types in QuickTouch allows you to track "How did you hear about us?" statistics for all your new customers.

After a new license plate is entered into the system and the customer information is recorded, the cashier will be prompted with a list of your advertising types. At this point the cashier can ask the "How did you hear about us?" question and select the appropriate entry.

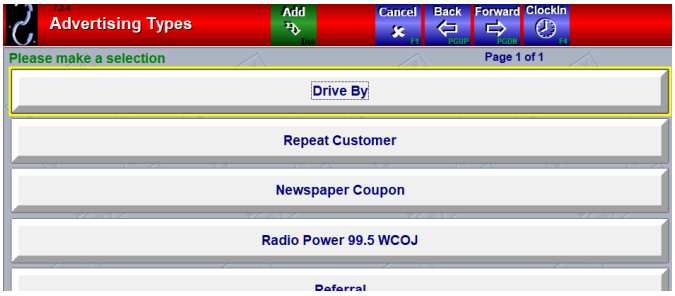
Common advertising types are not only paid advertising – some common "word of mouth" type advertising would be:

- Drive-by "I was just driving by and saw your sign…"
- Referral "My friend comes here all the time…"
- Competitor Mishap "I went somewhere else, and they screwed it up, so I came here…"
- Current Customer "I've brought my other car here before and you did a good job…"
- Professional Referral "The guys at the gas station told me to come here…"

These types would be listed in addition to your other paid advertising types – radio spots, newspaper ads, etc. If you don't wish to be prompted for the advertising type for each new customer, you can turn this feature off by deleting all advertising types.

**Advertising Types Page**

After selecting Advertising Maintenance from the Cash Register Maintenance menu, you will be prompted with a list of your advertising types. Press on an advertising type to edit that type.




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

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

**Page 1 of 1**

If you wish to delete an advertising type, go into that type, and press the green DELETE button at the top of the screen.

When you're viewing an advertising type, press OK to save any changes, or CANCEL to quit without saving changes.

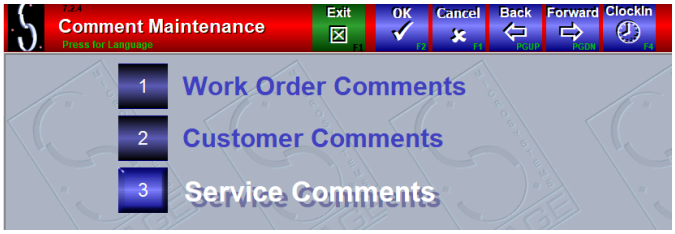
You can view a report of your advertising types in the Advertising Type Analysis report. From the Main Menu, choose Marketing Management, Advertising Type Analysis.

# Comment Maintenance

There are three types of comments supported in QuickTouch. All the comment fields will allow you to either type the comment manually, or to select from a preconfigured list. The three types of comments are:

**Comments Maintenance Selection Page**

After selecting Comments Maintenance from the Comments Maintenance menu, you will be prompted with a list of your comment types. Press on a comments type to edit that type.




**Comments Edit/Add Page**

Select an existing comment to edit or select the Add button (top of page) to create a new comment for the comment type.

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

Also note the “Add” button on this page that will allow you to add a new comment to the list.

**Page 1 of 1**

If you wish to delete a comment, press the green DELETE button at the top of the screen.

Press OK to save any changes or CANCEL to close without saving.

**Comment Description** Type in the comment description here.

**Display Sort Order** Indicate in which position you want the comment to appear.

# Reminder Maintenance

QuickTouch has the capability to print reminder cards. However, since some vehicles, depending on driving habits, may require more frequent oil changes than the usual 90 days, Reminder Maintenance allows you to configure different reminder periods.

The reminder date is set when the Invoice is printed from the Bay Screen. The reminder date can either default to one of the reminder periods configured in this section, or the cashier can be prompted to enter a reminder period.

Fleet accounts, which generally do not need reminder cards, can be configured to never send a reminder, or can be defaulted to a reminder period. This is done under Fleet Account Maintenance.

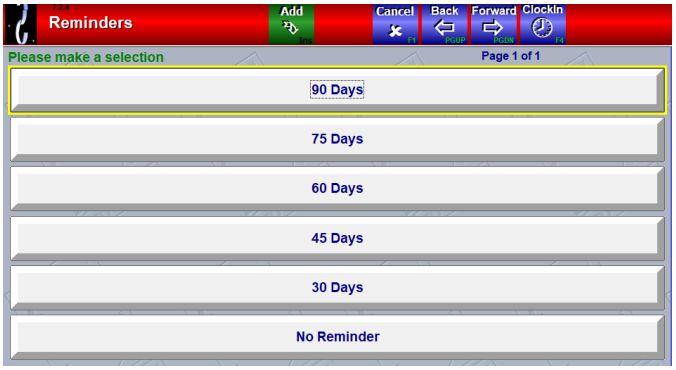
To automatically default to a particular reminder period for every vehicle (except fleets if applicable), from the Main Menu, choose System Management, General Setup Options, Reminder Maintenance. The following reminder periods are already configured in the system:

| | | |
|---|---|---|
| 90 Days | 60 Days | 30 Days |
| 75 Days | 45 Days | No Reminder |

At a minimum, you should have “90 Days” and “No Reminder” in the system.

**Reminder Edit/Add Page**

After selecting Reminders Maintenance from the Cash Register Maintenance menu, you will be prompted with a list of your reminder intervals. Press on an interval to edit that reminder.

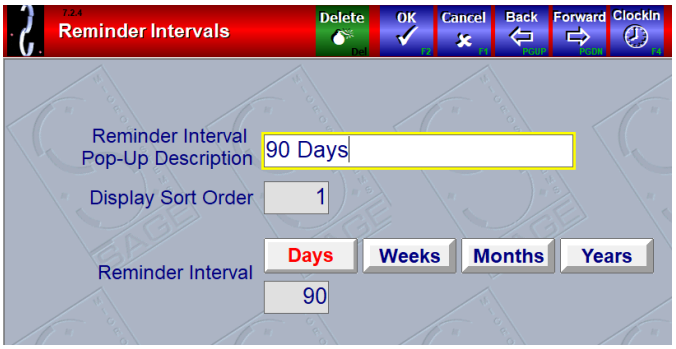



Note the “Add” button on this screen that will allow you to add a new reminder interval to the list.

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

**Page 1 of 1**

**Reminder Interval Pop-Up Description** This is the description of the reminder period.




**Display Sort Order** Indicate in which position you want the reminder interval to appear.

**Reminder Interval** Select the appropriate interval period and indicate the number of periods (i.e., “90 Days”, “3 Months”, etc.).

Choose the appropriate reminder interval. You will be prompted with a list of the reminder intervals. Press on the reminder interval to edit that reminder interval.

If you wish to delete a reminder interval, go into that reminder interval, and press the green DELETE button at the top of the screen.

When you’re viewing a reminder interval, press OK to save any changes, or CANCEL to quit without saving changes.

# General Setup Options

**General Setup Selection Page**

After selecting General Setup Options from the System Management Screen, you will be presented with a list of general setup options to choose from.

Note the “Page 1 of X” indicator. you can use the “Forward” and “Back” buttons to scroll through the screens.

# Center Information

Center Information is the location address information. This information will print on the customer invoices.

**Page 1 of 1**

**Center Number** This will usually be 1, except for multiple location setups.

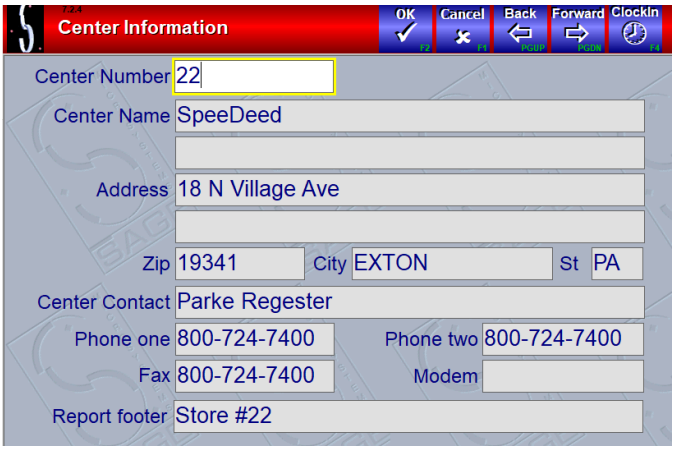
**Center Name, Address, City, St, Zip** Required. These will print at the top of various reports.

**2nd Line of Center Name** This line is information only, it does not print anywhere. **Center Contact** The manager’s name, if applicable. Information only, this does not print anywhere.

Phone One Not required but recommended. This will print on invoices and various reports.

**Phone Two, Fax, Modem** Optional additional information, these do not print anywhere.

**Report Footer** Optional but recommended for multiple location installs – you can configure it to print the location number in these cases. This will print the footer at the bottom of all reports. BAR#, EPA# These “hidden” fields will appear when a CA (California compliant) invoice is selected from Invoice Setup.



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# Business Information

Business Information is the return mailing address on Fleet Statements and provides additional information for franchisees (if applicable).

Note that pages 2-4 will not appear unless you have “Franchise” set to YES under Owner Setup. This information will be used on the Co-Op franchise report

**Page 1 of 4**

**Business Name, Address, City, St, Zip** Required.

**Business Contact** Optional.

**Phone One** Optional.

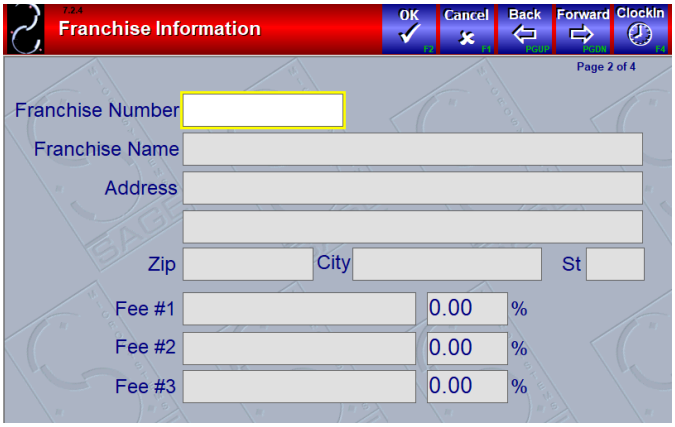
**Phone Two, Fax, Modem** Optional information that does not print anywhere.

**Page 2 of 4**

**Franchise Number** This is the store franchise number.

**Franchise Name, Address, City, St, Zip** These fields are the franchise corporate office contact information

**Fee #1, #2, #3 You** can indicate up to three different franchise fees. Enter the description and the percentage amount. The percentages are in whole number, not decimals, so type “600” and it will make it 6% (not .06).



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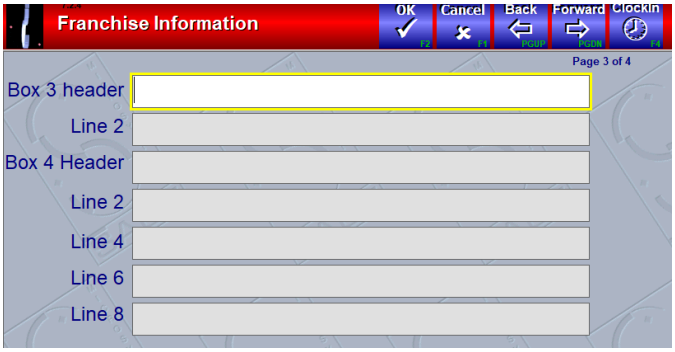
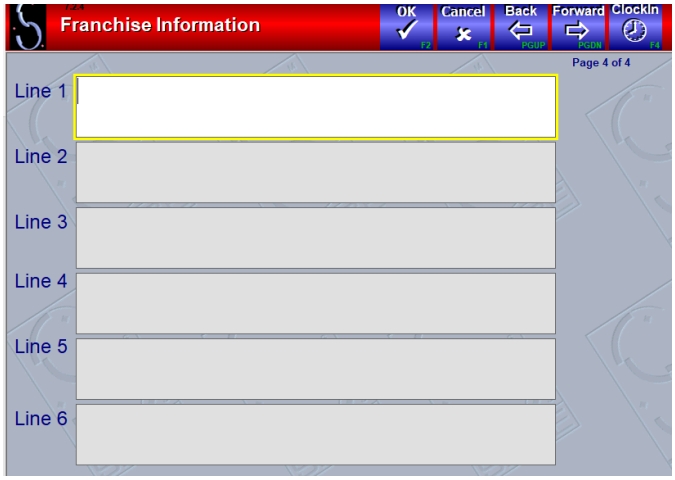
**Box 3** Header This is the title for the Fee #1 box. You can indicate a second line.

**Box 4** Header This is the title for the Fee #2 and #3 boxes. Yu can indicate additional lines for these boxes.




**Page 4 of 4**

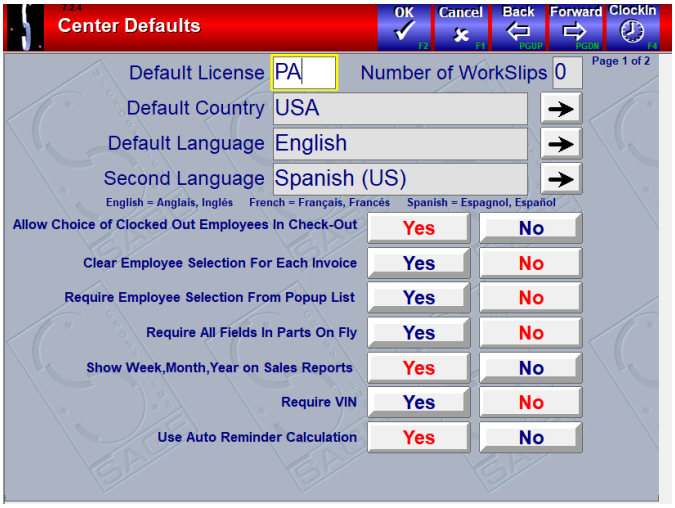
**Line 1-6** These are additional comment lines that print at the end of the Co-Op report



# Center Defaults

Center Defaults provides various options for how QuickTouch will operate at your location.

**Page 1 of 2**




**Default License** Sets state code to show on Check-in screen.

**Number Of Work Slips** Used with Work Order Type (Work slip) setting in Service Maintenance. Normally 0 & used for check-in station at car wash entrance.

**Default Country** Choices are USA, Canada, Mexico, Brazil, & Argentina. This sets locale settings. QuickTouch displays date & money amounts in local language. (Month/Day/Year vs. Day/Month/Year, dollars vs. pesos, etc.)

**Default Language Choices** are English, French, and Spanish. This will display the menus in the selected language.

**Second Language** Choices are English, French, and Spanish. This will allow you to indicate under Employee Maintenance which employees need the menus to be displayed in the second language. Note that although the menus are translated, things like services, part codes, Chek-Chart information, fleet accounts, etc. are not translated.

**Allow Choice of Clocked Out Employees In Check Out** Normally this is YES, to allow it. NO would prevent an employee who is not clocked onto the time clock from being assigned to a vehicle invoice.

**Clear Employee Selection for Each Invoice** Enabling this option, will require employees servicing vehicles to be selected with each transaction during cash-out.

**Require Employee Selection from Popup List** This option will force user to select the employee position options from the list of clocked in/out employees. Free text is disabled.

**Require All Fields in Parts On Fly** Normally NO. Parts-On-Fly is an invoice feature which allows you to enter outside parts onto the invoice. If No, you can skip the Cost and Invoice# fields. If Yes, these fields are required.

Show Week, Month, Year on Sales Reports Normally YES. Selecting NO would suppress the Week-, Month-, and Year-to-Date totals from showing on the sales reports. Some owners choose to disable these calculations so that the cashiers aren't privy to sales numbers.

**Require VIN** Require a VIN number be entered for vehicles on Check-In. The VIN field is located on the Extended Customer Information page of Customer Maintenance.

**Use Auto-Reminder Calculation** Normally NO, this would allow QuickTouch to calculate the next reminder date based on the customer average return visits.

These fields are used to calculate the Vital Statistics report. You will need to estimate these values.

**Default Labor On Fly Tax Status** Labor-On-Fly allows you to enter miscellaneous labor charges on the invoice. In some states, only parts are taxable, in others, both parts and labor are taxable. If labor is taxable, select YES.

**Default Parts On Fly Tax Status** Parts-On-Fly allows you to add miscellaneous parts to the invoice. Refer to your state and local tax laws for the appropriate settings.

**Labor Rate** Your average hourly labor rate.

**Number of Work Hours per Day** Average number of work hours per day.

**Estimated Overhead per Day** Estimate your average daily overhead (i.e., rent, utilities, insurance…)

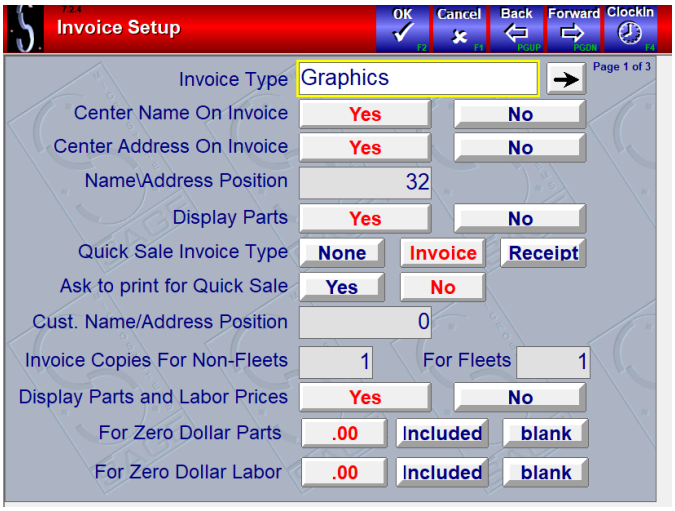
**Estimated Labor per Day** Your average daily labor costs.

**Base Ticket** Average The value entered here will get taken into consideration for the calculations on the Daily Sales Summary Report.

# Invoice Setup

Invoice Setup allows you to customize the layout of your Invoice. Our latest invoice format is the Graphics type, which is optimized for plain paper laser printers and has several advanced features. Other invoice formats may include or not include various options, so contact Sage Technical Support if you have special requirements. We will cover the Graphics invoice features here.

**Page 1 of 3**




**Invoice Type** This will normally be configured by the Sage Service Technician when your system is installed. These options all depend on location, printer type, and invoice layout. A few of the choices include:

*Preprinted Laser*-Preprinted invoices with Suggested Service intervals.

*Graphics (Laser)*- Plain paper invoice with the ability to print a bitmap logo image, disclaimer, invoice notes, promotion counters, and store number as part of the invoice number.

*Graphics Color (Laser)*- Identical to the Graphic invoice above, with the ability to print in any color.

**Center Name On Invoice** Prints the name of the lube center.

**Center Address On Invoice** This will print the address of the lube center on the invoice.

**Name\Address Position** This allows you to move the center name that prints on the invoice to the right. A position of 30 is centered on the page.

**Display Parts** YES displays all parts associated with a service. NO displays the service & total price only.

**Quick Sale Invoice Type** For a QuickSale, you can print on a full invoice, print to a receipt printer or not print at all.

**Ask To Print For Quick Sale** This will give the cashier the option to print a QuickSale Receipt, if desired.

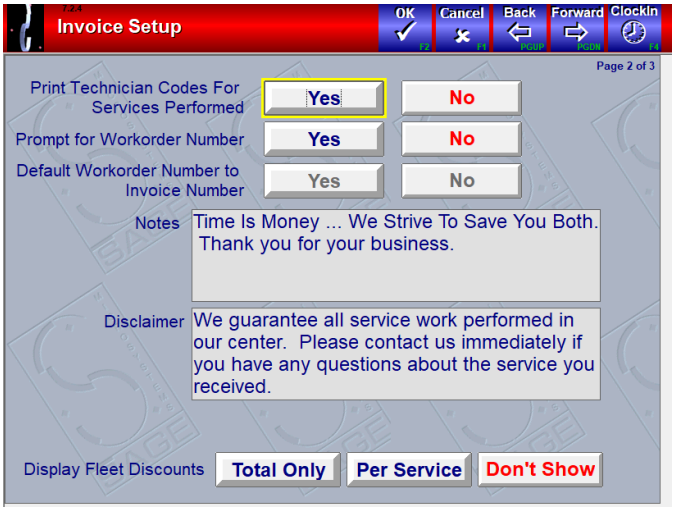
**Customer Name/Address Position** This allows you to move the customer's name and address that prints on the invoice to the right. A position of 30 is centered on the page.

**Invoice Copies For Non-Fleets** Specify number of invoices you want to print for non-fleet customer transactions.

**Invoice Copies For Fleets** Specify the number of invoices you want to print for Fleet customer transactions.

**Display Parts and Labor** Breakdown Certain states require that for each service the Parts and Labor breakdown be displayed on the invoice.

**Page 2 of 3** *(Note: Not all invoice types will have a Page 2 and if they do, may have different options.)*




**Print Technician Codes For Services Performed** Will print the employee code of the technician that performed a particular service. This feature works in conjunction with the "Ask for Employees" feature in Service Maintenance.

**Prompt for Work order Number During Checkout** Will prompt cashier for a Work order number when the invoice is created. This is used for locations that have a preprinted, numbered Work order and not the QuickTouch Work order.

**Default Work order Number to Invoice Number** Only activated if 'Prompt for Work Order Number' is set to yes.

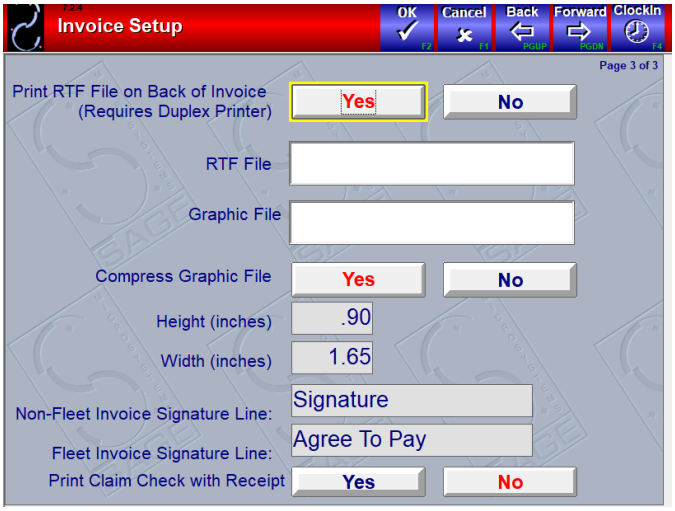
**Notes** These notes will print on each Graphics/Graphics Color invoice below the services completed, useful for announcing seasonal specials or other information.

**Disclaimer** The disclaimer will print at the bottom left of the Graphics/Graphics Color invoice.

**Display Fleet Discounts** Prints the A, B and C fleet discounts on the invoice. "Total Only" prints a line with the sum of all the fleet account discounts received on the invoice. The "Per Service" option prints the discount the fleet account receives under each service. "Don't Show" will not show the discounts the fleet account has received on the invoice.

Note: Only fleet discounts will appear on the invoice. Fleet markups will not be shown on the invoice.

**Page 3 of 3** (Note: Not all invoice types will have a Page 3 and if they do, may have different options.)




**Print RTF File on Back of Invoice (Requires Duplex Printer)** An automatic duplex printer is required to use this feature. You can print warranty or disclaimer information on the back of invoices which eliminates needing preprinted forms.

**RTF File** To print warranty/disclaimer, the document must be saved as an .rtf file and saved to c:\Program Files\Quicktouch\data so it appears in the RTF file box.

**Graphic File** Allows a logo to be printed in the top left corner of the Graphics/Graphics Color invoice. Supported image file types: .bmp, .jpg, .gif, & .ico. The logo must be saved to C:\Program Files\Quicktouch\data and then selected from the Graphic File box.

**Compress Graphic File** Allows a larger logo file to be automatically resized to fit within the available space on the invoice. The Height and Width values can be adjusted to suit any logo's orientation.

**Non-Fleet Invoice Signature Line:** Will print at the bottom of invoices for non-fleet customers.

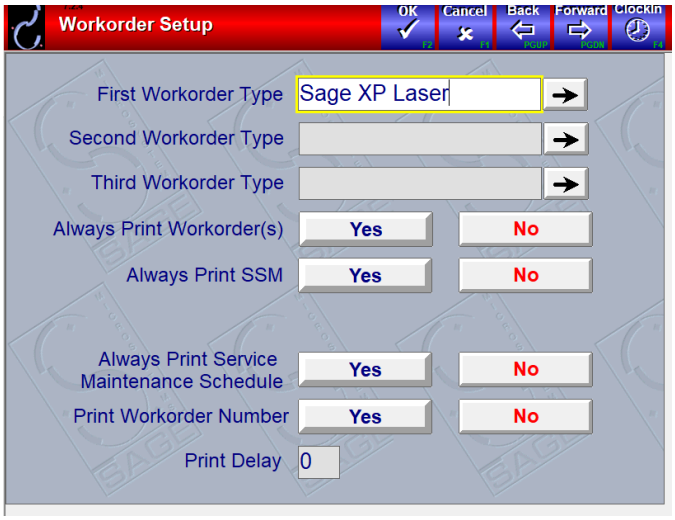
**Fleet Invoice Signature Line** Will print at the bottom of invoices for fleets.

**Print Claim Check With Receipt** Used in car wash formats.

# Work Order/SSM Setup

Work order/SSM Setup allows you to configure your Work order and set default printing options. The Work order will print after checking in a customer. The Work order is basically a scratchpad for the service technician – providing him with vital information and areas to make notes as he services the vehicle. The Sage Service Manual will print at the same time (if required) and will provide more detailed vehicle information based on the Chek-Chart data.

**Page 1 of 1 (Some work orders will have 2 or 3 pages)**




**Work Order Type** This will normally be configured by a Sage Service Technician when the system is installed. The options all depend on location, printer type, and invoice layout. A couple of the choices include:

*Sage CA Estimate BAR (laser)* – This work order is compliant with the California BAR and can be revised and signed by the customer

*Sage XP Laser* - Plain paper laser Work order optimized for Windows XP

**Print Multiple Work Orders** Some states require a printed estimate after check-in, in addition to the standard work order. QuickTouch can be configured to print a second or third type of Work order if necessary.

**Always Print Work Order** If Yes, the Work order will automatically print for each vehicle checked in (except for Quick Sales). If you choose No, you can still print the Work order manually from the Bay Screen.

**Always Print SSM** The Sage Service Manual (SSM) will print all Chek-Chart information for that vehicle. If you choose No, you can still print the SSM manually from the Bay Screen.

**Always Print Service Maintenance Schedule** If Yes, the Service Maintenance Schedule will print for each vehicle that is checked in. If you choose No, you can still print the SMS manually from the Bay Screen.

**Print Work Order Number** The Work order number will be the same as the invoice number. This will indicate if you want the number to print on the Work order. This will usually be Yes.

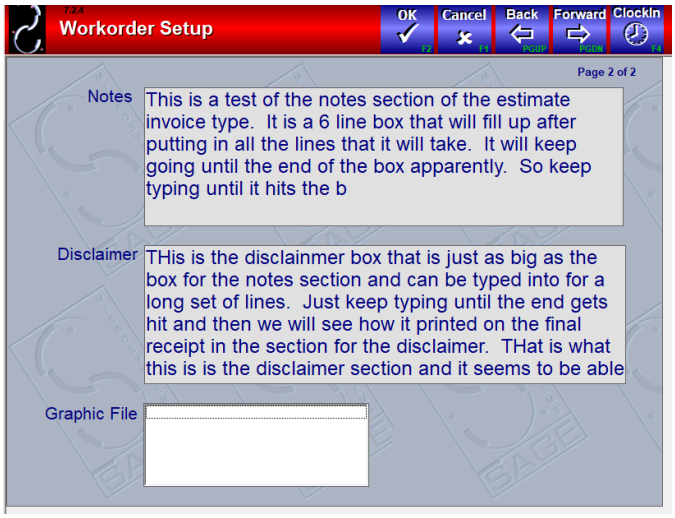
**Print Delay** Leave this as zero. This is only required on certain older systems.

**Page 2 of 2** *(Note: Not all work order types will have a Page 2 and if they do, may have different options. This example is the "Sage CA Estimate Bar" option.)*

**Notes** The notes will print on each Sage CA Estimate BAR Work order below the services selected.

**Disclaimer** The disclaimer will print at the bottom left of the Sage CA Estimate BAR Work order.

**Graphic File** This feature allows a company logo to be printed in the top left corner of the Sage CA Estimate BAR Work order. This screen is where the logo image can be selected. Supported image file types include .bmp, .jpg, .gif, and .ico. The logo image file must be saved into C:\Program Files\Quicktouch\data. Once the file is saved into this location, it can be selected from the Graphic File box

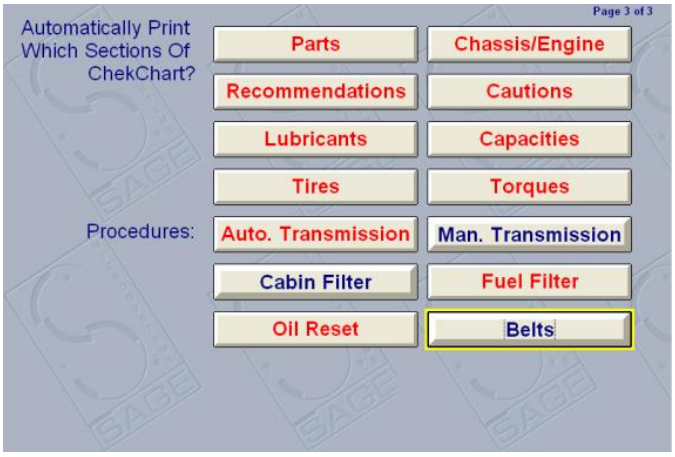



**Page 3 of 3** *(Note: Not all work order types will have a Page 3 and if they do, may have different options. This example is the "Sage CA Estimate Bar" option.)*

**Notes** The notes will print on each Sage CA Estimate BAR Work order below the services selected.

**Disclaimer** The disclaimer will print at the bottom left of the Sage CA Estimate BAR Work order.

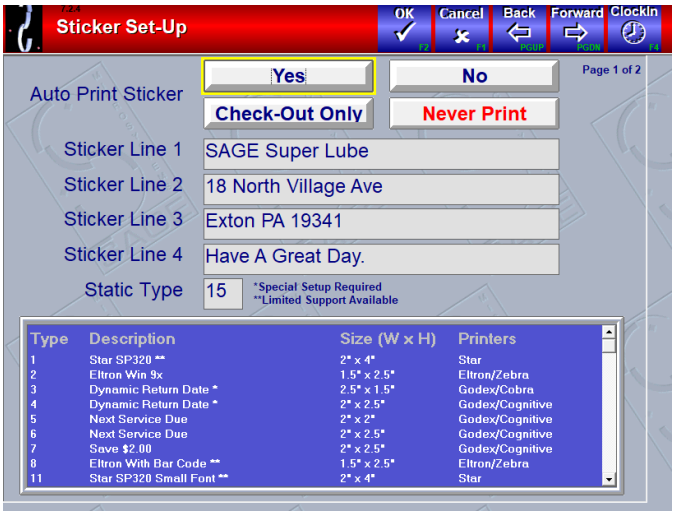
**Graphic File** This feature allows a company logo to be printed in the top left corner of the Sage CA Estimate BAR Work order. This screen is where the logo image can be selected. Supported image file types include .bmp, .jpg, .gif, and .ico. The logo image file must be saved into C:\Program Files\Quicktouch\data. Once the file is saved into this location, it can be selected from the Graphic File box



# Sticker Setup

Sticker Setup allows you to configure a supported static sticker printer to work with QuickTouch.

**Page 1 of 2**




**Auto Print Sticker**
*YES:* A sticker will print automatically when a customer is checked into the system and an "Oil Change" service selected.

*NO:* This option prevents a sticker from printing out automatically but can be reprinted on demand.

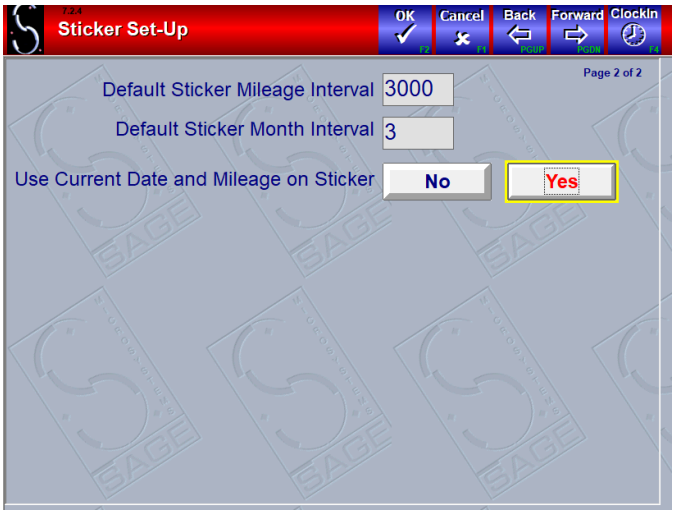
*Checkout Only:* A sticker will print automatically when a customer with an "Oil Change" service on the invoice is checked out of the system.

*Never Print:* This will disable QuickTouch from printing any stickers.

**Sticker Line 1-4** These four lines will generally be used for the Name, Address, and Phone of the lube center. These fields can be left blank if the stickers are customized and already have this information.

**Static Type** This will normally be 15 for the Godex or Cognitive Advantage LX printer. Use 5, 6, or 7 for the Pennz or Qprint printers.

**Page 2 of 2** *("Yes" selected for Use Current Date and Mileage on Sticker.)*




**Default Sticker Mileage** Interval This will generally be 3000 – this interval will be added to the customers' current mileage to calculate the return mileage.

**Default Sticker Month Interval** This will generally be 3 – this interval will be added to the current date to calculate the return date.

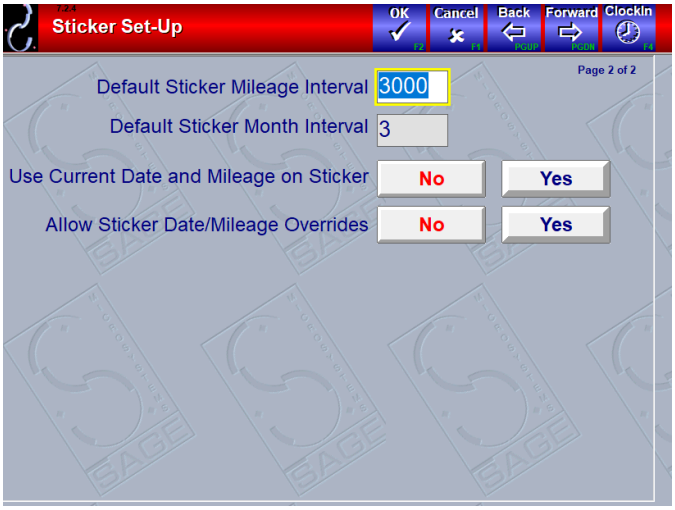
**Use Current Date and Mileage on Sticker**

"Yes" is only used when needing to print a static sticker with the current date and mileage of vehicle.

"No" will add another option to the screen called "Allow Sticker Date/Mileage Overrides". Continue to next Page 2 screenshot for further detail.

**Page 2 of 2** *("No" selected for Use Current Date and Mileage on Sticker.)*

**Allow Sticker Date/Mileage Overrides** "No" is the default option and is used if you want every sticker to use the default mileage and month intervals. The "Yes" option will allow multiple override options at check in/out that will change the return for service month and mileage; see below for further details.



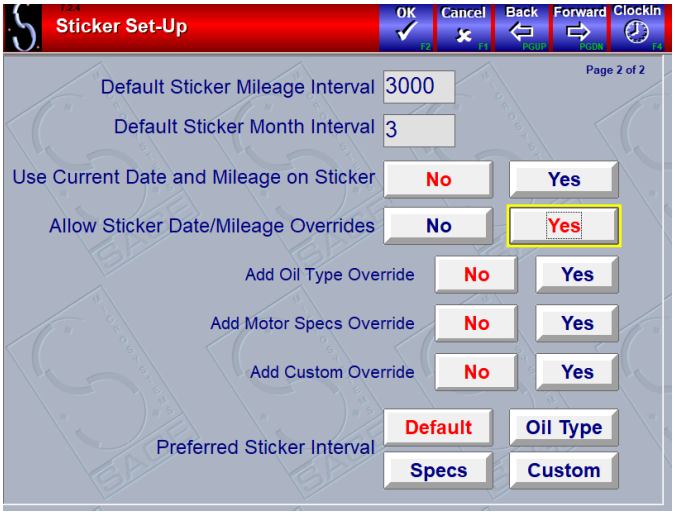

**Page 2 of 2** *("Yes" selected for Allow Sticker Date/Mileage Override.)*

**Add Oil Type Override** The "No" option will prevent you from selecting "Oil Type" at check in/out. "Yes" will allow you to select "Oil Type" at Check in/out. The oil type overrides are setup under each item.

**Add Chek-Chart Specs Override** The "No" option will prevent you from selecting "Specs" at check in/out. "Yes" will allow you to select "Specs" at check in. The "Specs" option will set the return mileage and month according to what Chek-Chart specifies for the vehicle.

**Add Custom Override** The "No" option will prevent you from selecting "Custom" at check in/out. "Yes" will allow you to select "Custom" at check in/out. The "Custom" option will set the return mileage and month according to what you type in the month and mileage boxes at check in/out.

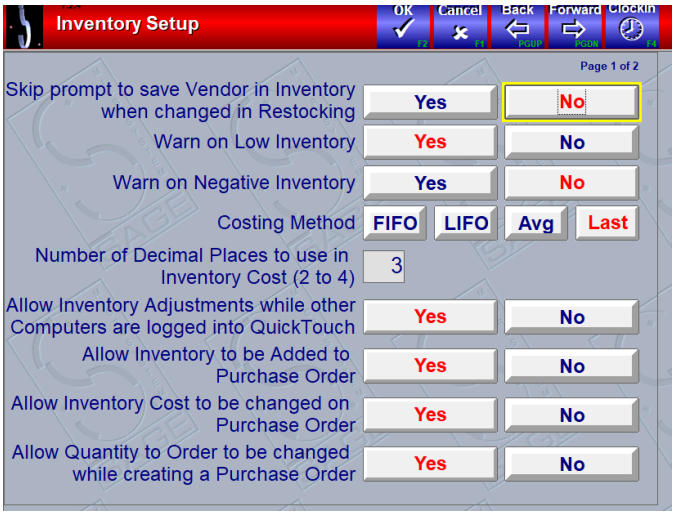
**Preferred Sticker Interval** This setting will allow you to set which option the static sticker will use as its default mileage and date interval. Example: If you want to use whatever the vehicle manufacturer states for mileage and date, then you will want to choose "Specs". You will still have the option of changing to one of the other methods at Check in/out, but the Specs option is the default.



# Inventory Setup

Inventory Setup allows to you manage several options related to Inventory.

**Page 1 of 2**




**Skip Prompt To Save Vendor…** When restocking your inventory items, you can change the vendor for each part – This will cause the system to prompt for confirmation before changing the vendor in the system.

Warn On Low Inventory When selling an item, the system can prompt you if the on-hand amount of that item falls below the Minimum Level.

Warn On Negative Inventory When selling an item, the system can prompt you if the on-hand amount of that item falls below zero. This would normally only happen if a recent shipment has been received but hasn't been restocked yet.

Costing Method This is used to keep track of your average costs and will only matter if the costs change. As an example, you have 10 AF1 filters on the shelf that cost you $5.00 each, and you received 10 more for a cost of $5.25 each.

- FIFO is First In First Out – the first 10 items sold will be costed at $5.00, and only then will the next and succeeding items sold be costed at $5.25.

- LIFO is Last In First Out – the first 10 items sold will be costed at the new cost $5.25, and only when these are used up will succeeding items be costed at their original amount.

- Average simply averages the cost across all in-stock items.

- Last uses the current cost of the stock number for any sales.

Note that the FIFO and LIFO methods both keep track of the cost of each individual item. In our example, you will not see a cost increase in your inventory usage reports using the FIFO method until the first ten items are sold. Using the LIFO method, you will see the cost increase immediately until you use up the new stock and start using the existing stock. The difference is that FIFO assumes that you rotate your stock (pushing existing stock to the front of the shelf and restocking behind them), LIFO assumes that stock is not rotated (existing stock is pushed to the back of the shelf and restocking in front of them.

**Number of Decimal Places to use in Inventory Cost** With this option the number of decimal places that are displayed in cost field can be changed from 2 to 4 for greater accuracy. Making a change here will change the number of decimal places on all inventory items.



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**Allow Inventory Adjustments while other Computers are logged into QuickTouch** If enabled, the system will allow Inventory Adjustments to be carried out while other computers are logged into the system.

Note: It is recommended that adjustments are not made during invoicing of customers or restocking of orders to avoid possible inventory variances.

**Allow Inventory to be Added to Purchase Order** This feature allows inventory items to be manually added to the PO if they weren't automatically added by the reorder point criteria.

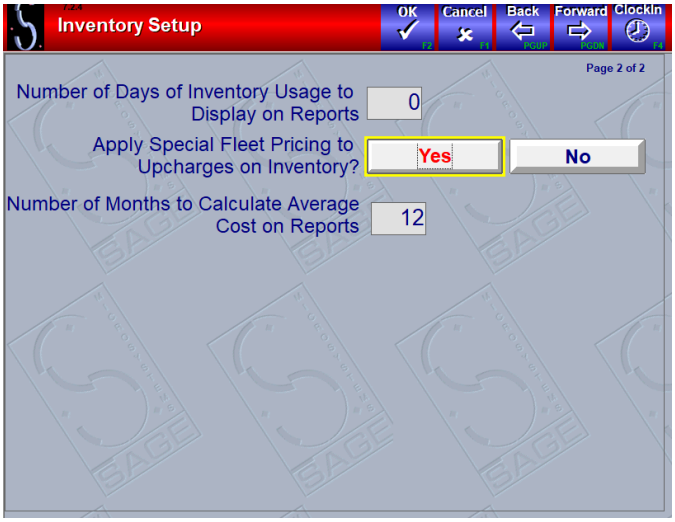
**Allow Inventory Cost to be changed on Purchase Order** This feature enable/disables the ability to adjust the cost of an inventory item during the editing or posting of a PO. This is useful for when a supplier makes a price increase.

**Allow Quantity to Order to be changed while creating a Purchase Order** This feature enable/disables the ability to adjust the quantity to order of an inventory item during the editing or posting of a PO.

**Page 2 of 2**

**Number of Days of Inventory Usage to Display on Reports** This number can be modified to show a larger or smaller look-back period for the usage on certain inventory reports (i.e., Stock Reorder Report). Default value is 90 days.

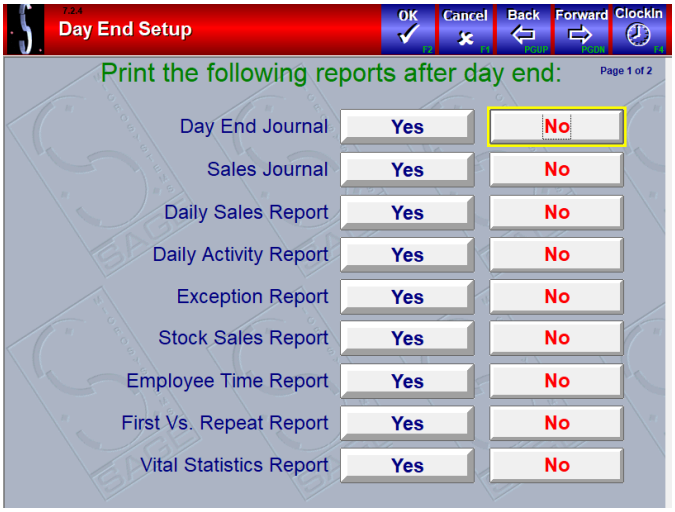
**Apply Special Fleet Pricing to Upcharges on Inventory?** This setting is to specify whether the special fleet pricing will apply to upcharges or the base service price only.



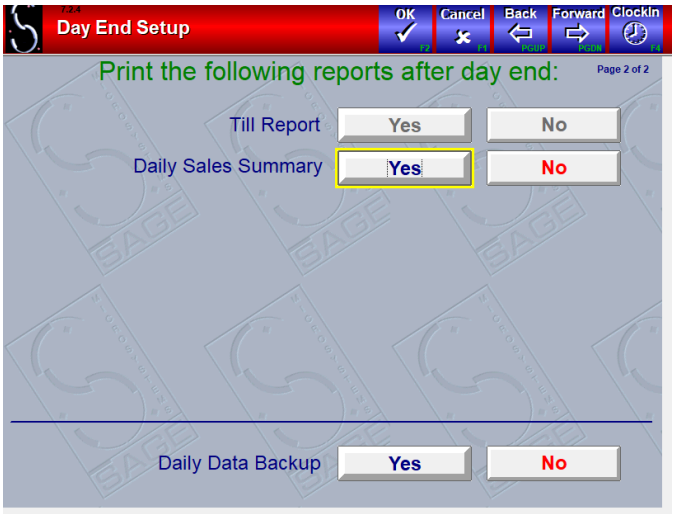
# Day End Setup

Day End Setup allows you to configure which reports will automatically print when you do a Day End Processing. You can also indicate if you want to be prompted to do a backup automatically at Day End.

**Page 1 of 2**




**Page 2 of 2**



# Week End, Month End and Year End Setups

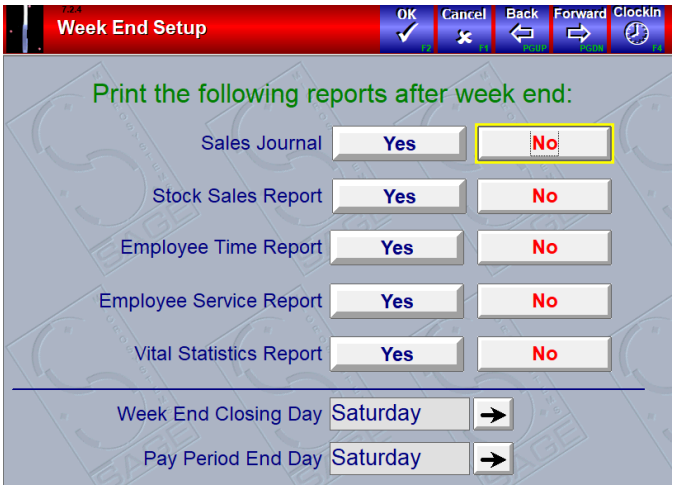
Week End, Month End and Year End Setups allow you to configure which reports will automatically print when ending the week, month or year.

### Week End Page

Week End Setup allows you to configure which reports will automatically print when you do a Week End Processing.

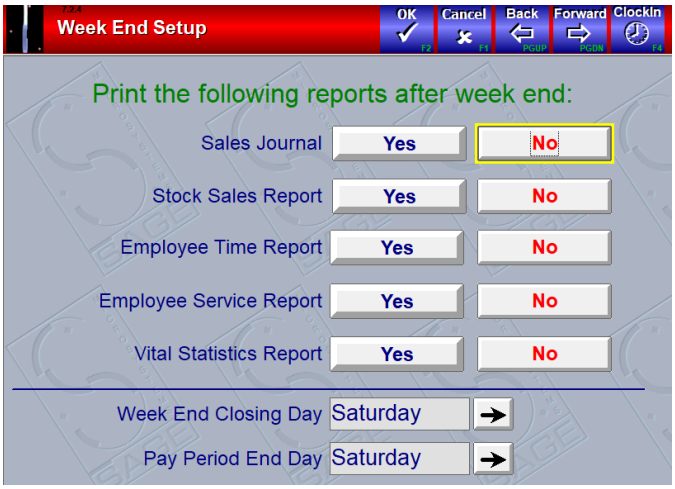
### Month End Page

Month End Setup allows you to configure which reports will automatically print when you run a Month End Processing.




### Year End Page

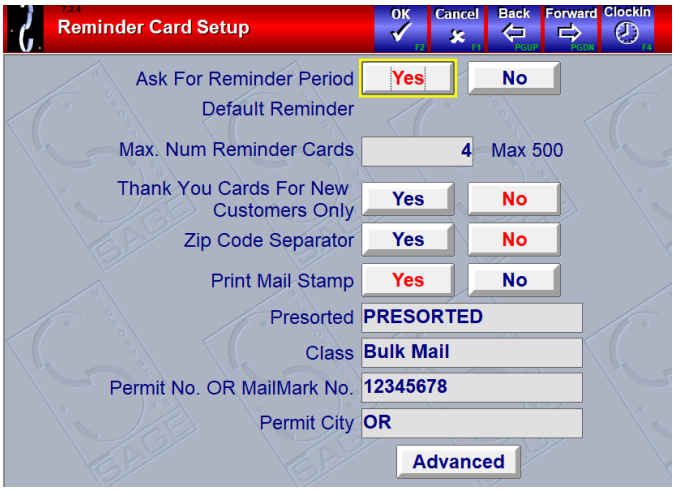
Year End Setup allows you to configure which reports will automatically print when you run a Year End Processing.



# Reminder Card Setup

Reminder Card Setup allows you to indicate a default reminder period, or have the cashier select the reminder interval for each customer. You can also configure reminder card options here. Advanced setup needs to be administered by a Sage Support Technician. New locations, or those running reminder cards for the first time, should contact Sage Technical Support to ensure that the reminder cards you are interested in ordering will work with QuickTouch.

**Page 1 of 1**




**Ask For Reminder Period** YES will prompt the cashier to select a reminder period for each customer. NO will automatically select the same reminder period for all vehicles, which is then displayed as the Default Reminder.

**Max Num Reminder Cards** This is how many reminder cards will print out in one batch. This feature was used more with the older dot-matrix printers, which tended to jam or run out of ink during long print runs.

**New Customers Only** If enabled, the Thank You card function in Customer Management will only print cards for first time customers.

**Zip Code Separator** This will sort the reminder cards by zip code and will print a separator between each zip code. This may be required by the Post Office for volume discounts.

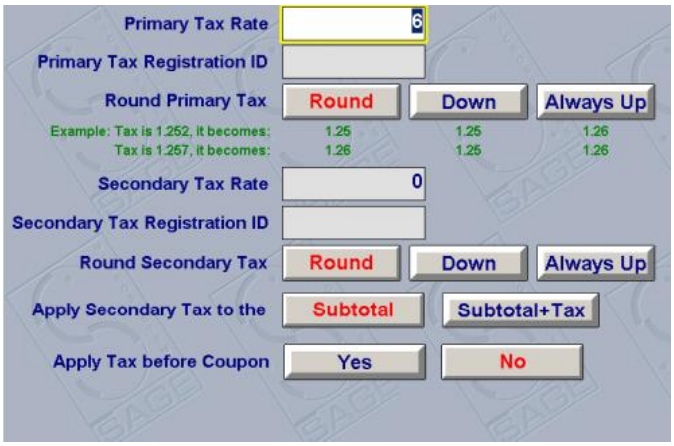
**Print Mail Stamp** An electronic mail stamp can be printed on Sage reminder/thank you cards. Presorted, Class and Permit numbers must be setup at a United States Post Office.

**Advanced** The Advanced screen is password protected; Sage Technical Support must be contacted for changes to this section.

# Tax Setup

Tax Setup allows you to configure up to two separate tax rates. Note that you will need to contact your accountant for the correct settings on this page, as each country, state, county, and municipality will have different tax laws and rules. Tax Setup is password protected, so you will need to contact Sage Technical Support to modify these settings.

**Page 1 of 1**




**Primary Tax Rate** Enter the Primary tax rate here as a percentage, i.e., "6," "6.5" or "7.75", etc.

**Primary Tax Registration ID** Leave blank except for locations in Canada– this would be GST.

**Round Primary Tax** Choose the appropriate rounding method, Round, Down, or Always Up.

**Secondary Tax Rate** Enter the Secondary tax rate here as a percentage, i.e., "6," "6.5" or "7.75", etc.

**Secondary Tax Registration ID** Leave blank except for locations in Canada– this would be PST.

**Round Secondary Tax** Choose the appropriate rounding method, Round, Down, or Always Up.

**Apply Secondary Tax to the Subtotal** (except for Quebec, where the Secondary Tax is applied to the sum of the Subtotal and Tax1) or Subtotal + Tax.

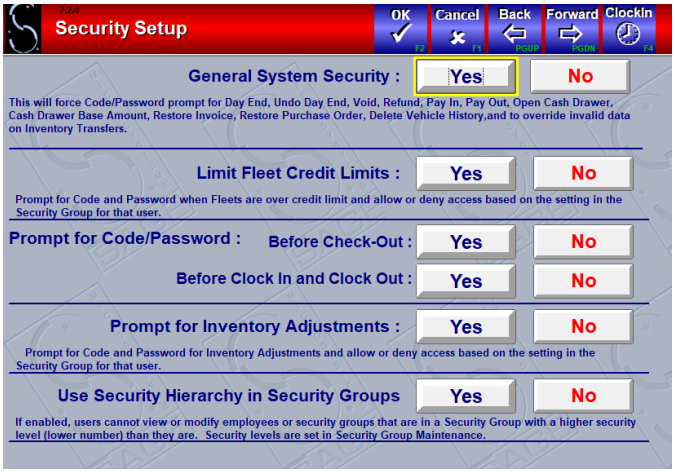
**Apply Tax Before Coupon** Usually NO. See the Coupon Maintenance section on page 137 for a detailed explanation.

Note that changes done under Tax Setup take effect immediately. This will affect your reports. The tax amount collected is calculated and saved with each individual invoice. When you run various sales reports, the "Tax Collected" is the sum of the tax collected on all invoices in that date range; it is NOT the total taxable sales amount multiplied by the current tax rate.

# Security Setup

Security Setup provides several security options. Some users wish to further monitor these areas of QuickTouch to exercise positive control over these functions.

**Page 1 of 1**




**Protect Cash Drawer And Bay Deletes** Setting this to Yes will force the Security Override Window to display, forcing the user to enter a code and password to verify security.

**Limit Fleet Credit Limits** Allows the manager or designated persons to override a fleet credit limit.

**Prompt for Code and Password Before Checkout** Forces the user to enter his code and password before checking out a customer.

**Prompt for Code and Password Before Clock In and Clock Out** Forces user to enter their code and password before clocking in or out of QuickTouch.

**Prompt for Inventory Adjustments** Forces the user to enter his code and password before adjusting inventory.

**Use Security Hierarchy in Security Groups** If enabled, Users cannot view or modify employees or security groups that are in a higher Security Group than they are. Security Levels are set in Security Group Maintenance.

# Pay Type Setup

Pay Type Setup allows you to configure different pay types for your system. Cash, Check, and Fleet payment types are required by the system, and you will not be able to modify or delete these payment types. However, you can configure any other payment type as required.

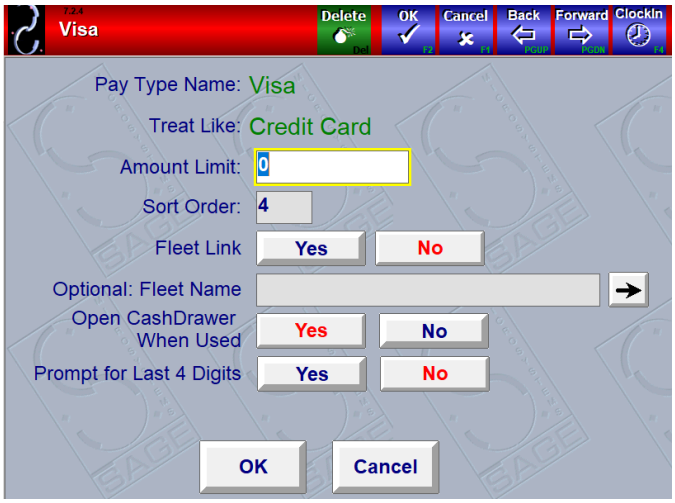
From the Main Menu, choose System Management, General Setup Options, Pay Type Setup. You will be prompted with a list of the pay types. Press on a pay type to edit that pay type.

Note the “Add” button on this screen that will allow you to add a new pay type to the list.

If you wish to delete a pay type, you need to go into that pay type.

When you’re viewing a pay type, press OK to save any changes, or CANCEL to quit without saving changes.

**Page 1 of 1**




**Pay Type Name** The name of the pay type. You cannot change it once it has been added. To make changes you will need to delete and re-add the pay type.

**Treat Like CREDIT CARD or OTHER**. There is no functional difference between these so use the Credit Card setting.

**Amount Limit** The dollar amount limit for this payment type.

**Sort Order** This will order the pay types by number. If more than one pay type has the same sort number, they will then sort alphabetically.

**Fleet Link** Normally this is NO. YES means that the pay type can only be used for a particular fleet Account. Most fleet accounts will use the Fleet payment type, so the Fleet Link would only be used in a particular situation…for instance, the fleet account does not pay their balance at the store but rather pays at another office location.

**Optional: Fleet Name** Selecting a particular fleet account for this payment type will automatically charge the invoice to that fleet. Leaving this blank will allow the cashier to indicate the fleet account at the time of sale.

**Open Cash Drawer When Used** YES or NO, depending on whether you want the cash drawer to open when you press this payment type at the time of sale.

**Prompt for Last 4 Digits of Credit Card During Check Out** Enabling this setting will prompt for the last 4 digits of a Credit Card when any ‘Credit Card’ payment method is used

# Cash Drawer Setup

Cash Drawer Setup is used if you have a working QuickTouch cash drawer.

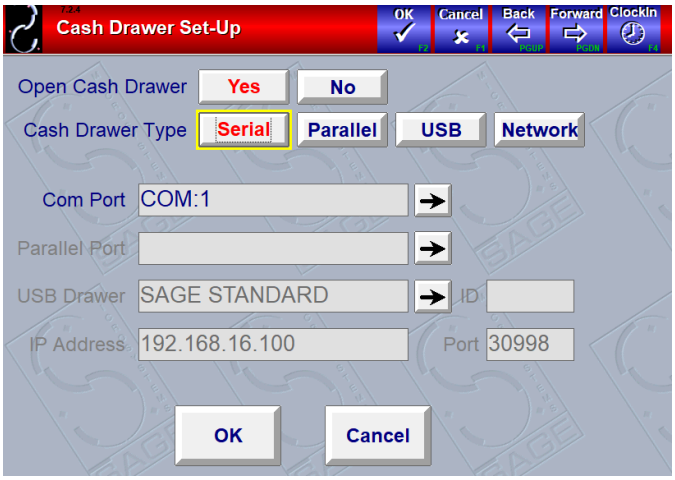
**Page1 of 1**

**Open Cash Drawer** YES to have the drawer open automatically based on the pay type. NO if there is no functioning cash drawer.

**Cash Drawer** Type Choose the interface type of your cash drawer. The most common type is USB, but if you are using an older cash drawer it may be Serial.

If using a Serial Cash drawer, indicate the computer COM (Serial) port that the cash drawer is connected to.

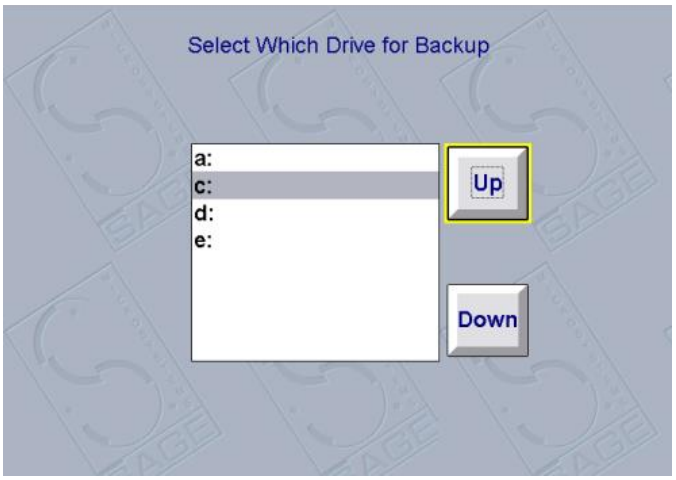
If using a Network cash drawer, you will need to have the IP Address and Port configured appropriately.



# Backup Setup

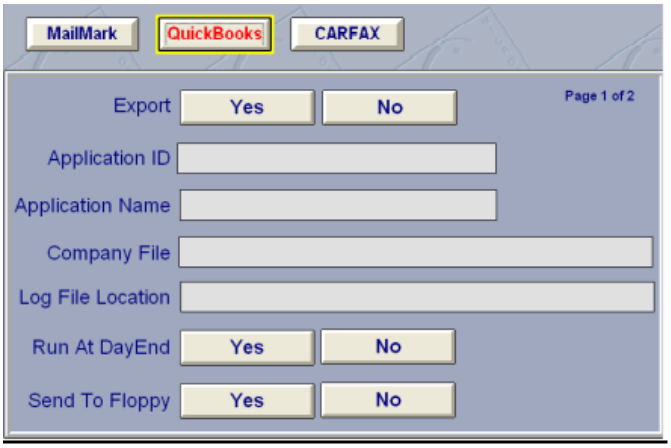
Backup Setup allows you to indicate the default backup location. This will normally be drive D:, which is the rewritable CD drive. QuickTouch also allows you to back up your daily data to a more convenient flash drive. These flash drives should be 1GB or larger to ensure that all your data will be saved. See the Daily Data Backup section on page 187 for more information and instructions for setting up your system to back up to a flash drive**.**

**Page 1 of 1**



# Export Setup, GL Export Setup and Sage Setup

**Export Setup**

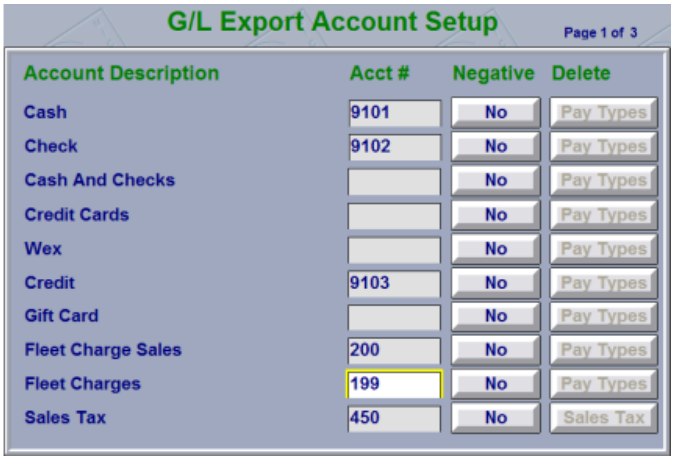



This screen is used to setup QuickTouch to export information to the QuickBooks interface as well as connect to CarFax QuickVIN.

This section will normally be administered by a Sage Support Technician. Please contact Sage Technical Support before making any changes on this screen.

Note: The MailMark button is no longer used for the MailMark export.

**G/L Export Setup**




The G/L Export Setup is used for configuring the QuickTouch to QuickBooks Export interface. All pertinent fields are listed and can be linked to the appropriate QuickBooks account number. If new Pay Types are created after the QuickBooks interface has been installed, they must be linked accordingly

**Sage Setup**

This section needs to be administered by a Sage technician, and is password protected.

# Owner Setup

Owner Setup allows you to configure QuickTouch options, which mostly affect the Bay Screen functionality.

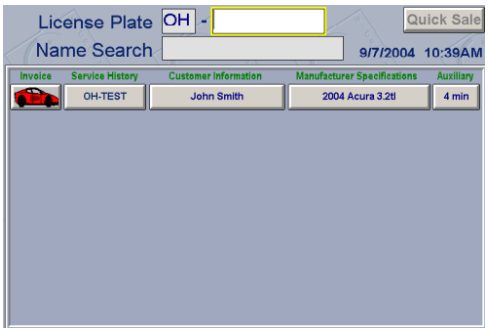
**Page 1 of 7**

**Report Output Device Type** This should normally be LASER unless the Oki 320T/420T printer is being used.

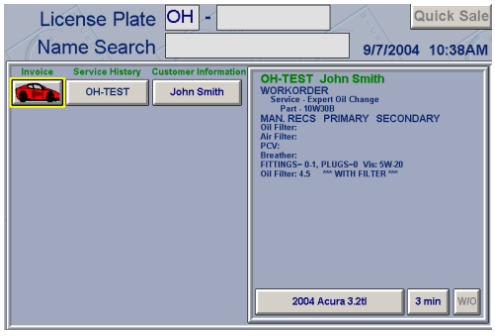
**Report Printing Style** This should normally be Fast.

**Bay Screen Style** QuickTouch has two different Bay Screen display styles.

*"Lube"* is the standard display style, which shows all cars on the bay, and provides the History, Customer Information, Manufacturer Specifications, and Auxiliary buttons for each vehicle.




*"Lube2"* display style provides for a "paperless Work Order", where work order information is displayed on the screen. Note that all the same options are available for each vehicle in the bay, but you must first highlight the vehicle before being able to view the work order or have access to the Manufacturer Specifications and Auxiliary buttons.




**Rows On Bay Screen** This feature is disabled. If more than 8 vehicles are on the bay screen, scroll arrows will appear.

**Franchise** Normally this will be NO. Choosing Yes enables the Co-Op report and enables three more configuration screens under Business Information that pertain to the Co-Op report. This is only necessary for franchise locations.

**AutoFill Service** Will allow QuickTouch to automatically fill in parts and quantity information when creating invoice,



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based on what was input when Work Order was created. The advantage is that it speeds up the Invoice process for most customers; the disadvantage is that invoices needing a change (i.e., customer requests house oil at check-in but later is up-sold to a high mileage oil), the AutoFill must first complete. Then the service can be deleted and re-added.

**Skip Comments and Checkout Screen Allowed** The invoice process consists of four screens for most vehicles – Services, Comments, Checklist, and Checkout. Shortcut buttons allow you to skip between all four of these screens. Thus, it is possible to go straight from the Services screen to the Checkout screen, by using the "Invoice" shortcut. The advantage is speed; the disadvantage is that by skipping over the comments and checklist screens, vital information concerning the vehicle (recommendations, low fluid levels, etc.) might not be recorded onto the invoice by the cashier.

**Warning Message For Returning Non-ChekChart Vehicles** Normally this will be YES. When a new vehicle is recorded into the system, you indicate the Year, Make Model and Engine. However, sometimes very new vehicles will not be available in QuickTouch, and you will have to manually enter the information. You can have QuickTouch prompt you when the vehicle returns to complete the information.

**Enable Extended Invoice Screen Editing (QuickTouch)** Normally this will be NO. On the blue Services screen, as you are entering services, occasionally the price for parts or services may need to be changed. Enabling this option allows you to change the price directly on the blue screen. Disabling this option forces you to either provide a coupon for any discounts or add miscellaneous parts or labor for any upcharges. The advantage is speed and accuracy; the disadvantage, however, is that the cashier can override ANY price in the system, and there is NO tracking mechanism for these changes.

**Enable Extended Invoice Screen Editing (Epicor)** Same as the previous settings but applies to services that were added through the Epicor ISE interface.

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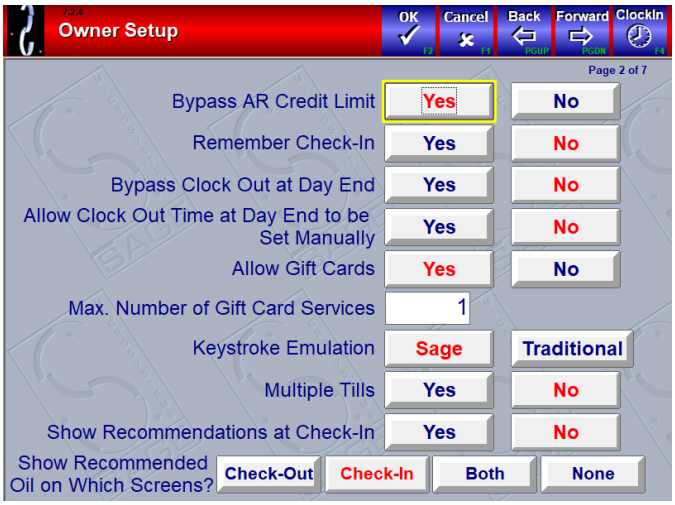
**Bypass AR Credit Limit** Normally this will be NO. This allows QuickTouch to ignore the fleet account credit limits.

**Remember Check-In** If YES, when selecting a car for check-out, the services selected at check-in will automatically come up as services performed when selecting the red car at invoicing. The advantage to that you won't have to reselect the services at checkout, but the disadvantage is that you do not have a choice as to which services are prompted first.



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**Bypass Clock Out at Day End** Normally, when doing Day End Processing, if any employees are still clocked into the time clock, you will be prompted with these employees, giving you an option to clock them out. This allows an accurate employee timesheet to print, as well as reminding the manager if anyone forgot to clock out. If you wish to bypass this, choose YES here.

**Allow Clock Out Time at Day End to be Set Manually** Allows the person closing the day to manually enter the time that the employees will be clocked out. These times will be recorded as 'edited' times on the Time Clock Audit Report.

**Allow Gift Cards** This option allows you to sell and redeem electronic gift cards (managed through a separate third-party electronic exchange). There is considerable setup to this option, please see the Gift Card section on page 207 for more information.

**Max Number of Gift Card Services** This should be at least 1 if Allow Gift Cards is set to Yes.

**Keystroke Emulation** Sage Emulation mimics keystrokes and shortcuts like the Dos LubePlus system. Traditional Emulation uses normal Windows keystrokes and shortcuts.

**Multiple Tills** Enabling Multiple Tills gives QuickTouch the ability to track multiple cash drawers on separate computers or more than one shift worked on one physical cash drawer. If enabled, the Open and Close Till functions must be completed on each till before starting/ending the business day. (See section on Till Management on page 50 for more information.

**Show Recommendations at Check In** If enabled, this will show an additional popup screen at check in after the Customer form, but before the Service Maintenance Schedule. The pop-up displays information such as recommended oil grade/viscosity, oil capacity, cautions and previous service comments.

**Show Recommended Oil on Which Forms** The feature displays a small pop-up message notifying the user of the manufacturer recommended oil for the current vehicle. The

setting allows it to pop up at Check out or Check in only or both places.

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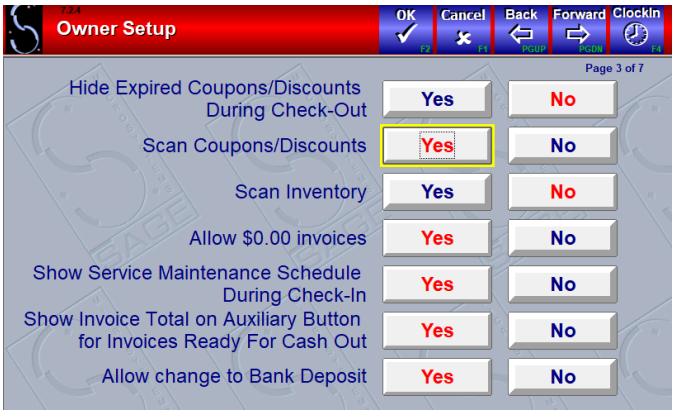


**Hide Expired Coupons/Discounts During Checkout** With this option set to Yes, QuickTouch will only show coupons and discounts that are currently within their active dates. Any expired coupons or discounts will not be shown.

**Scan Coupons/Discounts** If enabled, coupon and discount prompts at cash out will only accepted a scanned barcode. Note: A Sage approved barcode scanner is required to use this feature.

**Scan Inventory** Item look-ups will be searched by Stock Number or scanned barcode. Note: Product UPCs must be scanned ahead of time into the barcode field of Item setup in Inventory Item Maintenance before using this feature.

**Allow $0.00 Invoices** This feature allows zero dollar invoices to be processed. This is useful for warranty work or top-offs. Show Service Maintenance Schedule During Check In This option enables the Service Maintenance Schedule to automatically display on screen for every customer.

**Show Invoice Total on Auxiliary Button for Invoices Ready For Cash Out** Displays the final invoice total for the corresponding invoice once vehicle is processed.

**Allow Change To Bank Deposit** Normally this will be NO. Most stores start the day with a fixed cash drawer amount, say $150. At day end after the deposit is removed, $150 remains in the drawer for the next day. However, some stores prefer to leave the loose change in the drawer and only deposit a dollar amount, leaving an odd amount in the drawer for the next day. Enabling this option allows you to indicate the deposit amount, and QuickTouch will change the starting drawer amount accordingly for the next day.

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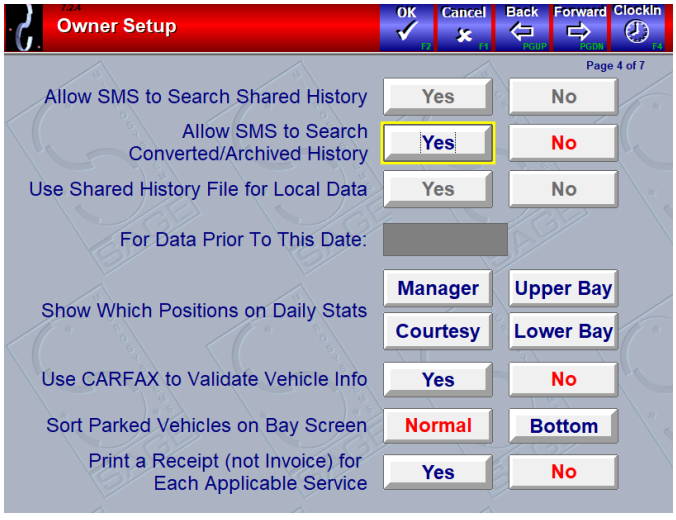


**Allow SMS to Search Shared History** Only available in multiple store setups, NexGen Customer/History Sharing required.

**Allow SMS to Search Converted/Archived History** Available for shops that had a data conversion from another software system. This setting should also be enabled if you have an Invoice Archive performed on your database.

**Use Shared History File for Local Data** Only available in multiple store setups, NexGen Customer/History Sharing required.

**For Data Prior To This Date** Used in conjunction with the previous setting. Only available in multiple store setups, NexGen Customer/History Sharing required.

**Show Which Positions on Daily Stats** Choose which invoice technician positions are displayed on the Daily Statistics Employee breakdown.

**Use CarFax to Validate Vehicle Info** If enabled, allows QuickTouch to communicate with CarFax to validate the vehicle's information.

**Sort Parked Vehicles on Bay Screen** Allows you to choose where parked vehicles are displayed on the bay screen. The "Normal" option will display the parked vehicles in descending, chronological order based on the time that they were entered into the bay screen. "Bottom" will sort the parked vehicles to the bottom of the bay list.

**Print a Receipt (not Invoice) for Each Applicable Service** If enabled, QuickTouch will print a receipt for each service on the invoice for which a receipt is specified rather than a full invoice in Service Setup. So, if there are 5 Services on an invoice, and 3 of them are set to 'Receipt' on page 5 of their service setup, then the system will print the set number of regular invoices (page 1 of Invoice setup), plus 3 receipts.

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**Include Security For Parking Vehicles** If Yes, the Security Override Window will appear, prompting the user to enter a code and password to verify their security before parking a vehicle.

**Hide Parts Price On Invoice For Actual Parts Services (Graphics Invoice Type only)** By default, for a service that is setup as Actual Parts Pricing method and Fixed Labor pricing, QuickTouch will display the Parts and Labor portion separately. If you set this to yes, it will combine the Parts and Labor portions into one amount next to the Service on the invoice (The blue screen will still display the parts and labor separately).

**Show Taxable/Nontaxable Totals on Invoices (Graphics Invoice Type only)** For compliance with some state laws, this setting can show the totals of each portion of the sub-total.

**Show VIN on Invoices (Graphics Invoice Type only)** The VIN will be printed in the body of the invoice, after all Services, Parts, Labor, Misc. charges, Coupons and Discounts.

**Show Miles Since Last Visit on Invoices (Graphics Invoice Type only)** The miles since last visit will be printed in the body of the invoice, after all Services, Parts, Labor, Misc. charges, Coupons and Discounts.

**Use Loyalty Rewards Program** This enables a Yes/No option on the Extended Customer Information page. This in no way correlates to the Loyalty Rewards setup that is explained under the Service Group Management section of the Manual.

**Allow Emailing Invoices** This setting will allow you to choose whether to Print, Email or Print and Email your customer's invoice. If a no email address was collected, the system will prompt for it at check out. Note: Proper Email client setup and/out SMTP server setup required to utilize this feature. Contact Sage Technical Support for more information.

**Email Address Validation** The system will verify whether the email address that is entered is valid.

**Signature Capture** This enables on-screen signature capture to be used on the printed or emailed invoice. Compatible Tablet or touch screen monitor is required.

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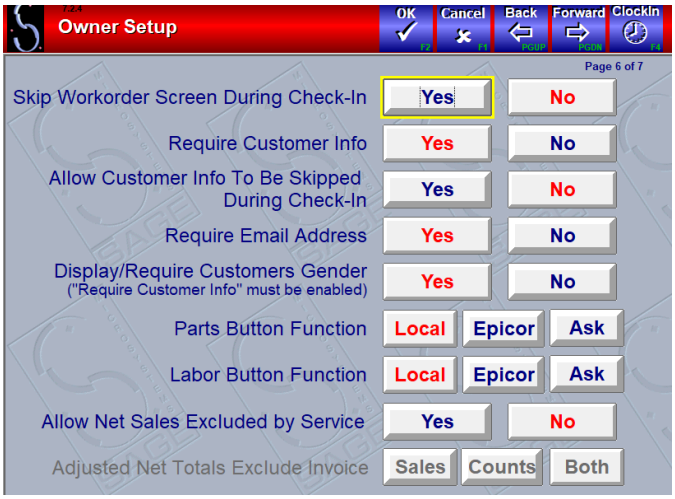


**Skip Workorder Screen During Check In** If this setting is enabled, the system will automatically skip the check in process and will take you from the Customer Information screen directly to the Invoice Blue Screen. If this setting is set to No, check in can be skipped by pressing the Green Invoice button at the top of the screen.

**Require Customer Info** This feature requires customer information to be entered prior to checking out a vehicle. The system will not allow the user to proceed until the customer's information has been entered in.

**Allow Customer Info To Be Skipped During Check-In** Selecting Yes on this setting will allow you to skip the customer information when checking a car in, then it will allow or deny invoicing based on the previous setting.

**Require Email Address** This feature requires an email address to be entered at customer check in/out and will not proceed without one. If the customer does not provide or have an email address, you can press the "Opt Out" button to proceed with the check in/out.

**Display/Require Customers Gender** This feature requires the customer's gender to be selected at check in/out.

**Parts Button Function** This setting controls the behavior of the Parts button on the Blue Screen. If Local, the button will ask you to enter a stock number from your inventory or bring up the Parts on the Fly screen if the stock number entered does not exist. If Epicor, the system will launch you into the Epicor ISE interface. If Ask, the system will prompt you each time to either use the Local method or Epicor.

**Labor Button Function** Similar to the Parts button function setting above, you can choose Local to simply enter a labor amount and description or Epicor to launch into Epicor ISE.

The Ask setting will prompt you each time for which method to use.

**Allow Net Sales Excluded by Service** Choose whether to allow specific services to be excluded from the Net Sales, Car Counts and Average Net Sale (Ticket Average) calculations on sales reports.

**Adjusted Net Totals Exclude Invoice** Choose whether only the Sales, only the Counts or both are excluded from the Net total's calculations

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All the following options determine whether a filter catalog can be associated with the group. If set to yes, they will display on the Sage Service Manual underneath the standard Oil, Air, PCV, Breather and Cabin Air Filters.

- Belts
- Spark Plugs
- Cabin Air Filters
- Caps
- Fuel Filters
- Wiper Blades
- Lights
- Transmission Filters

# Email Setup

**Page 1 of 3**

**From Name** Name that displays as the Sender on the email

**Subject** This will be displayed as the subject on the email

**From Email Address** Email that displays as the sent from

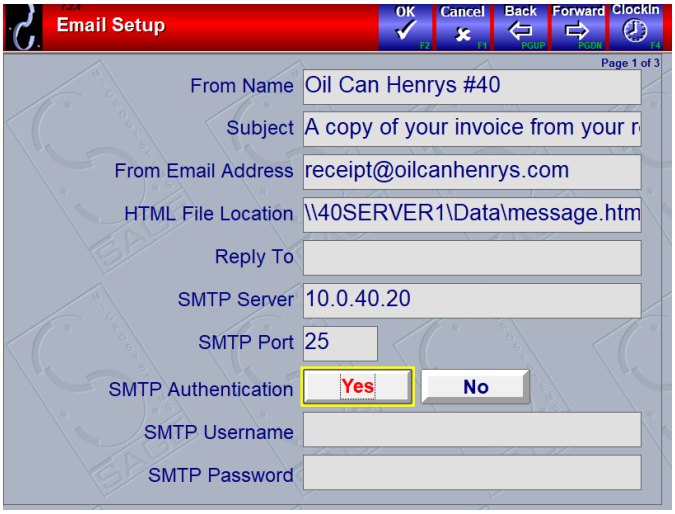
**HTML File Location** Location of HTML file for email body

**Reply To** Email that will serve as the reply to address

**SMTP Server / Port** The Server name that handles outgoing mail and the port which the SMTP server uses to send mail

**SMTP Authentication** Yes/No if login required for SMTP

**SMTP Username / Password** The Username/Password for your SMTP Server

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**POP Login** Specify whether POP Login is required by server

**POP Server** Specify the POP server name

**POP Username** Specify the POP Username

**POP Password** Specify the POP Password

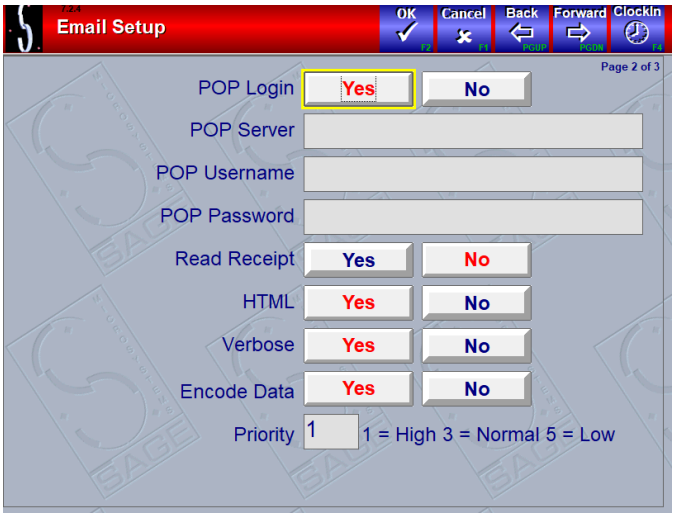
**Read Receipt** Request a read receipt from email recipient

**HTML** Use HTML (graphical) email, or plain text

**Verbose** Yes or No (used for advanced troubleshooting)

**Encode Data** Yes or No

**Priority** 1 = High 3 = Normal 5 = Low

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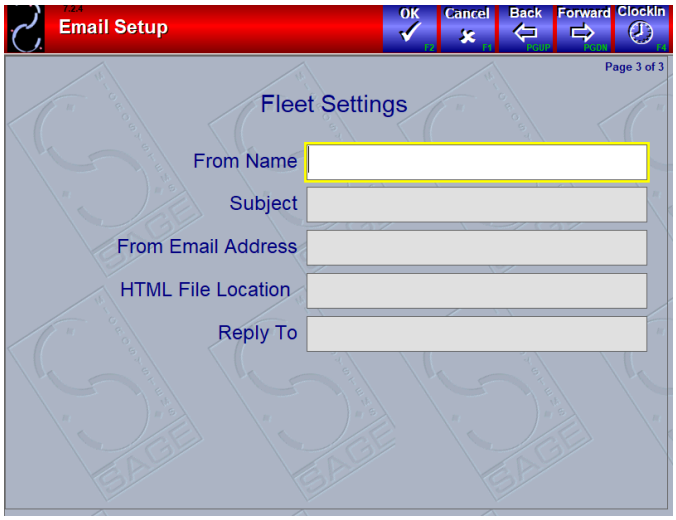
For Fleet Accounts only



# Estimate Setup

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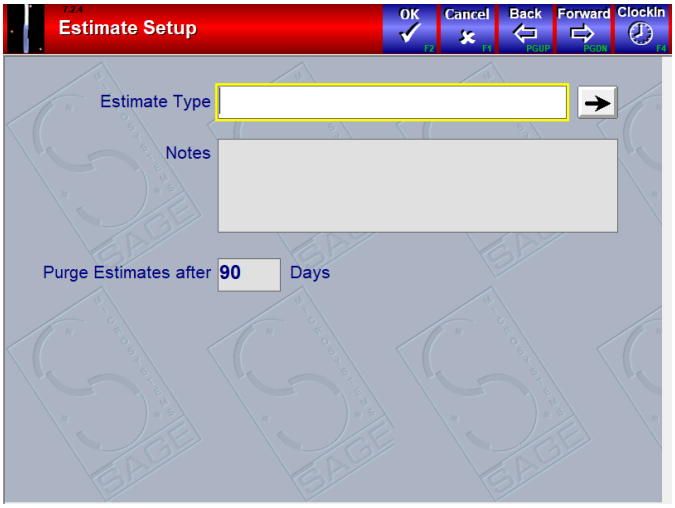
**Estimate Type** If left blank, the estimate will print in the same format as your Invoices. If you use preprinted invoice forms, you can choose a different format here, such as Graphics, which utilizes plain paper, which can help you save on paper costs.

**Notes** A customized Note can be setup to print on every Estimate.

**Purge Estimate after ___ Days** By default, QuickTouch will save all Estimates on the bay screen for the number of days specified here. If an estimate is not converted into an invoice prior to this, it will be automatically deleted.

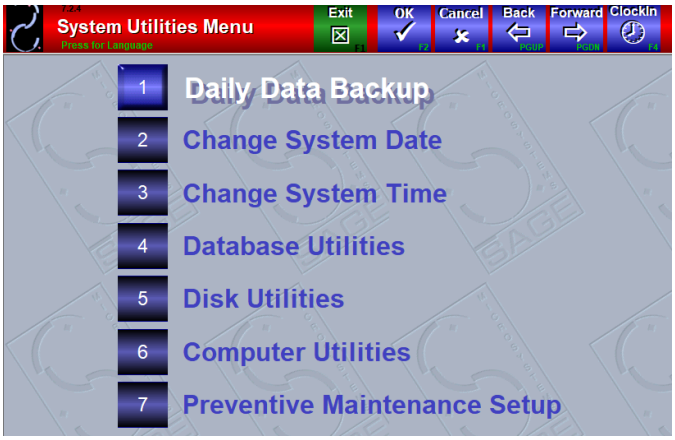


# System Utilities

**System Utilities Menu Page**

System Utilities provides several diagnostic functions for your system. Generally, you will not need to use these utilities unless instructed by a Sage Technician.

After selecting System Utilities from the System Management Screen, you will be presented with a list of System Utilities Menu options to choose from.




## Daily Data Backup

Daily Data Backup allows you to manually back up all QuickTouch data. Note that the Daily Data Backup does NOT back up any non-QuickTouch information (such as the Windows My Documents folder).

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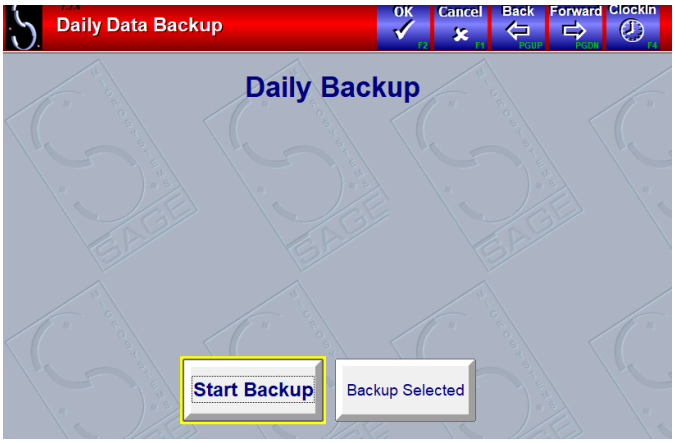


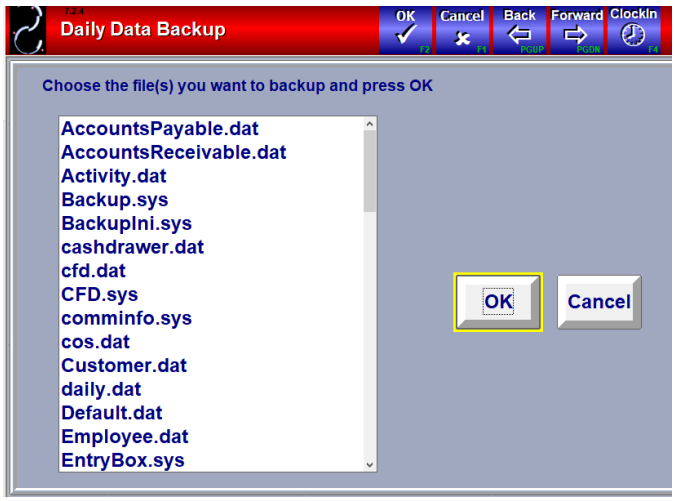

**Start Backup** This will start the backup to a pre-formatted CD-RW disk or Flash Drive (as selected in Backup Setup).

You will see a status displayed when the backup starts – do not disturb the computer during this process or attempt to launch QuickTouch on any other computer.

**Backup Selected** Allows you to choose the file(s) that you want to back up. This will only need to be used when instructed by a Sage Support Technician.

Note: Flash drives should be 2GB or larger. Please see the section on backing up QuickTouch (pg 146) for directions on how to set up your daily data backup for a flash drive.

**Backup Files Selection Page**




Choose the file(s) that the QuickTouch Technician has asked you to select.

**OK** Starts the backup.

**Cancel** Cancels the backup process.

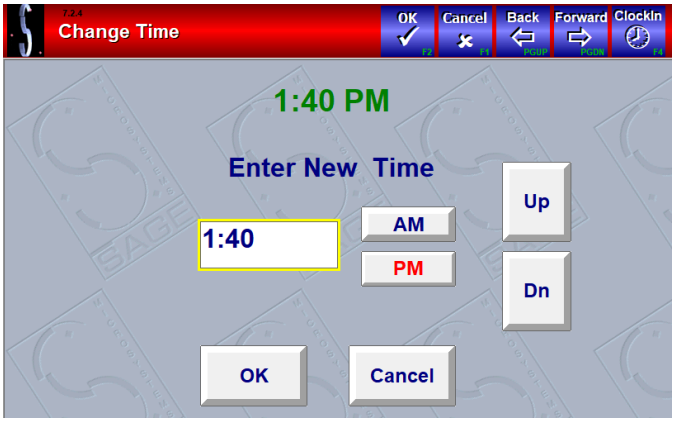
# Change System Date and Time

This allows you to change the date on the computer. Computers have a “BIOS Battery” on the motherboard which powers the PC BIOS (a memory chip on the computer motherboard). The BIOS in turn keeps the date and time accurately, along with other hardware configuration information, even when the computer is unplugged. If you find that you need to change the date or time often, this battery may need to be changed. The batteries normally have a life of approximately five years.

Note that changing the system date may activate a QuickTouch security feature that will require a password from Sage.

Also note that if you have several computers, you will need to keep the date and time in sync on all of them manually.

The computer will recognize Daylight Savings Time changes automatically.




# Database and Disk Utilities

Database and Disk Utilities should only be administered by instruction from a Sage Support Technician.

# *Preventative Maintenance Setup

*See QuickTouch technician.

# Computer Utilities

**Computer Utilities should only be administered by instruction from a Sage Support Technician.**

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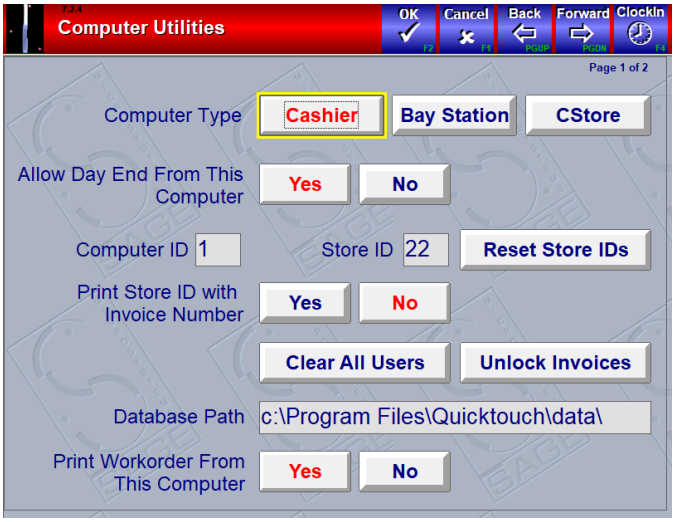



**Computer Type** Cashier and Bay Station are exactly the same, except that Cashier allows you to cash out a customer and print an invoice from the Bay Screen on that computer – a Bay Station computer will prompt you to "Send" the invoice to the Cashier computer to be cashed out. The CStore option allows the computer to run as a simple cash register (i.e., no Work orders or invoices). CStore generally will not be used.

**Allow Day End From This Computer** YES or NO. Yes is normally only used for the main Cashier station.

**Computer ID** The main Cashier station is normally "1", and additional bay stations are 2, 3, etc. Each computer needs a unique Computer ID.

**Store ID** This will normally be "1" except for Central Office locations.

**Reset Store IDs** NEVER PRESS THIS. Print Store ID With Invoice Number This is useful for owners of multiple locations – this will print the store number, then a dash, and then the invoice number on every invoice (i.e. 32-54665 meaning Store 32, Invoice 54665).

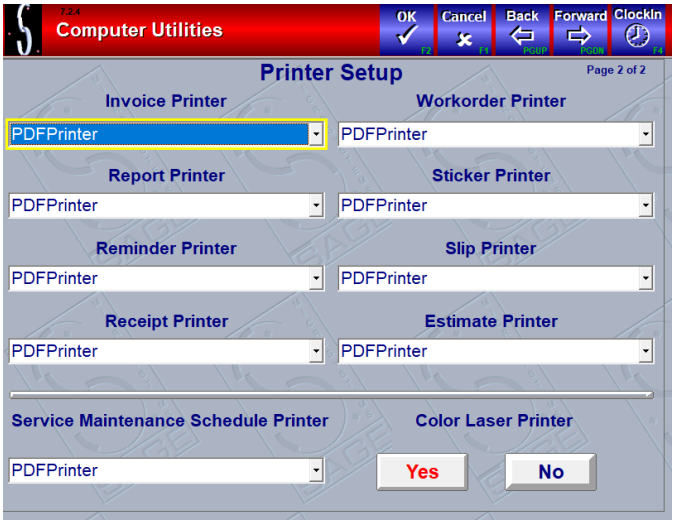
**Clear All Users** When performing a Day End using the main computer, all other computers need to be exited out of QuickTouch. In the event that QuickTouch thinks that another computer is still in QuickTouch, when you have confirmed that all computers have exited, you can use this function to continue with the Day End. Generally, a Sage Support Technician will instruct you when to use this function.

In newer versions of QuickTouch (6.5.6 and newer), the Clear All Users function is incorporated directly into the Day End Processing procedure.

**Database Path** DO NOT CHANGE THIS! This points to the QuickTouch database files, which may reside in various places. If you accidentally change or press this field, please hit CANCEL so that this information will not be changed. If you change this and the path is not valid, QuickTouch will not work!

**Print Work Order From This Computer** Always YES. The NO setting was used in older systems and is only available for legacy support.

**Printer Setup** Normally, a Sage Support Technician will configure all printer settings for you at the time of the install. However, there may be times in the future where you need to install additional printers in your facility. After installing the printer, this screen will help you choose where you want various documents to be printed.



# Business Group Setup

Business Groups allow you to track different profit and expense categories separately. For instance, your business may be divided between Lube Services, Repair Services, Wash & Detail Services, Impulse Items, etc. By creating a Business Group for each profit center, you can track inventory, employee wages, and profits separately for each group.

Note that when you enable Business Groups, for every report that you print, you will receive a report for each business group and a report for store totals, plus a report for any non-business group items. Thus, if you have two business groups, you will receive four Daily Sales Reports.

Also note that there are no configurable options for the business groups. You must go to every inventory item and service that is related to a particular business group and assign it to that group.

From the Main Menu, choose System Management, Business Group Setup. You will be prompted with a list of Business Group if there are any already configured.

Note the “Add” button on this screen that will allow you to add a new Business Group to the list.

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

If you wish to delete a Business Group, go into that group and press the green DELETE button at the top of the screen.

When you’re viewing a Business Group, press OK to save any changes, or CANCEL to quit without saving changes.