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QuickTouch Reference Manual

Company History

Congratulations on your purchase of the Sage QuickTouch Lube Point-of-Sale System. This manual will provide you an overview of your new system, various configurations, some of its components, and guide you through using your system.

Since our incorporation in 1988, Sage Microsystems, Inc. has become known as an innovator and leader in point-of-sale computer systems for the fast lube industry. And because it's our *only* business, all of our resources go into building systems to meet your ever-changing business needs. We made our systems faster and friendlier, our upgrades regular and reliable. You can count on QuickTouch to deliver the unsurpassed performance and continuing improvements our customers have come to expect. At Sage, we pride ourselves on our commitment to offering you the highest quality products and services.

That level of commitment resulted in a decision made at Sage in 1998 to re-write our entire product line using state-of-the-art technology. This re-write resulted in the QuickTouch family of products. These products include features such as the Microsoft Windows operating system (the worldwide computing standard), laser printers, thermal sticker printing, and Touch screen technology.

These and other product additions and enhancements are a direct result of the feedback we receive from you. If you have any ideas on how we can improve the QuickTouch system, please feel free to pass them along to us, and we will endeavor to incorporate the best ideas into our product.

Purview of This Document

This document is more than just a technical manual on how to use the QuickTouch system. Many of our customers are new to the quick lube industry, or are new to computers. As we explain our system throughout the following pages, we will often provide "Best Usage" suggestions on how to use the system. You will be able to identify these sections whenever we use the terms "Generally" or "Usually".

Every market and municipality has different expectations or laws that impact your business. Certain topics, especially tax issues or labor requirements, will require further research on your part with professionals who are familiar with the laws in your state and city.

Contact Information

Customer Support

800.724.7400

Mailing Address

18 North Village Avenue
Exton, Pennsylvania 19341

Fax Number

610.524.3234

www.sagesystem.com

System Components

A standalone POS system provides the full functionality of the QuickTouch system in an entry level package.

The standalone system consists of the following components:

- Point-of-Sale Server

- Touch screen Monitor

- Cash Drawer

- Work Order Printer (Lexmark MS415dn Laser Printer)

- Static Sticker Printer

- Invoice Printer (Lexmark MS415dn Laser Printer or Lexmark CS410dn Color Laser Printer)

- UPS (Uninterruptable Power Supply)

- Mouse

- Keyboard

A networked system provides full functionality of the QuickTouch system at as many locations throughout your facility as needed.

The networked system consists of all of the components listed above, with the addition of the following:

- Network Router

- Bay Station Computer (one or more)

- Office Station Computer (optional)

Touchscreen Monitor

Elo CRT Touchscreen Monitor
(Discontinued)

Elo LCD Touchscreen Monitor

The Elo Touchscreen monitor provides an easier user interface than a mouse.
Touching anywhere on the screen is the same as a left-click on a mouse. The mouse
can still be used if preferred.

Cleaning

The monitor should be cleaned with a dry soft cloth, or with a soapy water mixture
on a soft cloth, or just a paper towel. NEVER USE CHEMICALS (anything stronger
than Windex) to clean the monitor. Always spray the cleaner onto a cloth and then
clean the monitor with the cloth – spraying too much liquid directly onto the monitor
could possibly leak into the monitor.

Re-aligning the Mouse Pointer to Your Finger (Calibrating)

The Elo Touchscreen software is what allows you to touch the monitor and have the
software respond as if it was a mouse click. The software needs to be *calibrated* in
order for it to work correctly. This is normally done when the system is installed, but
might occasionally need to be recalibrated. You will need to recalibrate if you notice
that QuickTouch is not responding correctly when you touch the screen – for
instance, if the wrong button keeps being pressed. The screen may be responding as
if you're touching in a different place than you actually are.

Use this procedure if you need to recalibrate the screen.

1. On the Windows Desktop, or from Control Panel, double-click on the Elo
Touchscreen icon.

2. The Elo Touchscreen Properties window will launch. Click on the Align button.
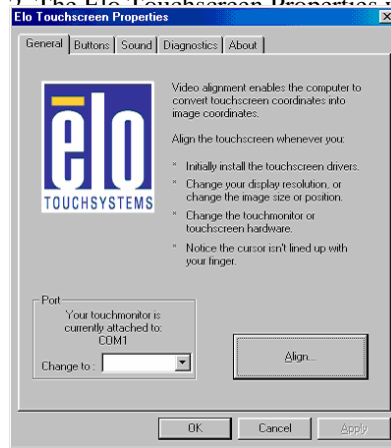
3. A series of targets will be presented. Carefully touch the center of all three targets.

Touch the targets from
a position of normal use.
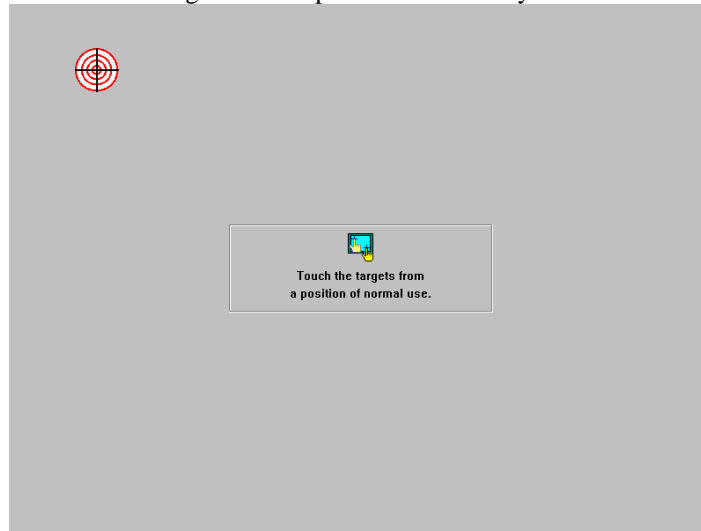
4. After touching the three targets, you will have an opportunity to test the calibration. Touch different gray areas of the screen, you should see the mouse pointer jump to where you touch. If it is correct, press the Yes button. If not, press No and you can touch the targets again.

Check Video Alignment

Touch different areas on the screen.
Does the cursor jump to your fingertip?

Align will cancel in 30 seconds.
Press Esc key to cancel now.

Yes   No
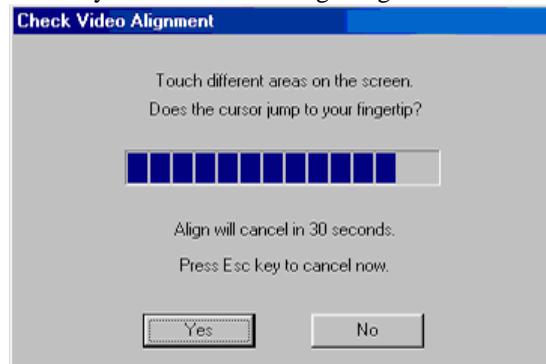
5. When done, you can exit out of the Properties window and launch QuickTouch.

APG Cash Drawer

The APG cash drawer is a sturdy addition to the QuickTouch system. It provides two media slots in the front, a removable tray insert, coin roll storage under the tray, and a three-position lock mechanism to provide appropriate levels of security and functionality.

APG provides a 1 year limited warranty on its cash drawers.

Positioning the key in the straight up-down position and removing the key will allow only QuickTouch to open the drawer, thus providing auditable security for the cash drawer.

Laser Printer Overview

Laser printers use plain copy paper or "multi-use" paper available at any retail or office supply store.

Invoices may be preprinted invoices, or plain paper invoices. See the Invoice Setup section (pg 146) for different invoice format examples.

Toner cartridges contain the "ink" that the laser printer puts on the paper (it's actually a dust made of plastic resin that is melted onto the paper). You will want to purchase at least one extra toner cartridge to keep on hand for when you need to replace the one in the printer.

Toner cartridges feature a higher initial cost ($153 for the 3,500 page toner cartridge at a local office supply store) compared to a pin-fed printer ink cartridge ($17), but will yield a very large number of printed pages and is actually cheaper than the usual two-part, continuous fed invoices. For an example price comparison, I priced on the internet 10,000 preprinted continuous-fed 1-color forms for $570, and a $17 ink cartridge, which averages out to about 5.9¢ per page. For the laser printer, the cost per page is about 4.8¢ per page (3.8¢ for the toner and 1¢ for the plain laser paper). Thus, the laser printer yields a savings of $110 over 10,000 invoices. Note also that Lexmark offers a recycle program through third party vendors which may allow even more savings. (There are also "Toner Refill Kits" which allow you to refill the toner cartridge yourself for much less – Sage does NOT guarantee the effectiveness of these kits and you may have to purchase a new toner cartridge if they prove ineffective).

Lexmark MS415dn Laser Printer

Lexmark MS415dn Laser Printer

The Lexmark MS415dn printer is used for Work Orders, Invoices, Reports, and Reminder Cards. The 415dn is network ready and capable of duplex printing (printing on both sides of the paper).

In the 415dn model printer, the toner cartridge actually sits inside the photoconductor unit (imaging kit) which is also a replaceable part.

- Paper – Use plain copy paper (~1¢ pp)

- 80,000 page monthly duty cycle

- 40ppm, 256MB, 6.5sec to first print

- Toner Cartridges

    - MS415dn Toner Cartridge Mfg# 50F1000 (yields 1,500 pages)

    - MS415dn High Yield Toner Cartridge Mfg# 50F1H00 (yields 5,000 pages)

    - MS415dn Extra High Yield Toner Cartridge Mfg# 50F1X00 (yields 10,000 pages)

    - MS415dn Black Imaging Kit Mfg# 50F0200 (Yields 60,000 pages)

Lexmark E460dn Laser Printer (discontinued)

Lexmark E460dn Laser Printer (Note: An additional 550-sheet bottom paper tray can be purchased so that two types of paper can be used, preprinted invoices and plain paper).

The Lexmark E460dn printer is used for Work Orders, Invoices, Reports, and Reminder Cards. The 460dn is network ready and capable of duplex printing (printing on both sides of the paper).

In the 460 model printer, the toner cartridge actually sits inside the photoconductor unit which is also a replaceable part.

- Paper – Use plain copy paper (~1¢ pp)

- 80,000 page monthly duty cycle

- 40ppm, 64MB, 6.5sec to first print

- Toner Cartridges

    o E460dn Toner Cartridge Mfg# E260A21A (yields 3,500 pages)

    o E460dn High Yield Toner Cartridge Mfg# E360H21A (yields 9,000 pages)

    o E460dn Extra High Yield Toner Cartridge Mfg# E460X21A (yields 15,000 pages)

    o E460dn Photo Conductor Kit Mfg# E260X22G (Yields 30,000 pages)

Lexmark CS410dn Color Laser Printer

The Lexmark CS410dn color laser printer is used for invoices and the Service Maintenance Schedule (also known as "the gauges"). The Lexmark CS410dn is network ready, duplex capable and can use plain copy paper or "multi-use" paper available at any retail or office supply store.

Invoices may be preprinted forms, or plain paper invoices. See the Invoice Setup section on page 146 for different invoice format examples.

- Paper – Use regular copy paper (~1¢ pp)

- 75,000 page monthly duty cycle

- 32ppm (Black), 32ppm (Color), 256MB, 10sec to first print

- Toner Cartridges

    o Black High Yield Mfg# 700H1 (yields 4,000 pages)

    o Cyan EHY Mfg# 700H2 (yields 3,000 pages)

    o Magenta EHY Mfg # 700H3 (yields 3,000 pages)

    o Yellow EHY Mfg# 700H4 (yields 3,000 pages)

    o Photo Conductor Kit Mfg#700P (yields 40,000 pages)

Lexmark C544dn Color Laser Printer

The Lexmark C544dn color laser printer is used for invoices and the Service Maintenance Schedule (also known as "the gauges"). The Lexmark C544dn is network ready, duplex capable and can use plain copy paper or "multi-use" paper available at any retail or office supply store.

Invoices may be preprinted forms, or plain paper invoices. See the Invoice Setup section on page 146 for different invoice format examples.

- Paper – Use regular copy paper (~1¢ pp)

- 55,000 page monthly duty cycle

- 25ppm (Black), 25ppm (Color), 128MB, 12sec to first print

- Toner Cartridges

    o Black Extra High Yield Mfg# C544X2KG (yields 6,000 pgs)

    o Cyan EHY Mfg# C544X2CG (yields 4,000 pgs)

    o Magenta EHY Mfg # C544X2MG (yields 4,000 pgs)

    o Yellow EHY Mfg# C544X2YG (yields 4,000 pgs)

    o Photo Conductor Kit Mfg#C540X71G (yields 30,000 pgs)

Sticker Printer Overview

QuickTouch has the capability to automatically print a static cling reminder sticker for each vehicle receiving an oil change service. The latest technologies use "thermal printing" to create a sticker that will remain sharp and legible for a much longer period of time than handwritten or ink-printed stickers, which tend to fade or smudge.

Thermal printers require the use of special sticker labels and ribbon. Notably, the stickers will have a black bar on the back of the labels along the perforation, and are specially manufactured for thermal printing.

Thermal ribbons come in "wax", "resin", or "wax/resin" varieties. Make sure that you use the correct labels for the ribbon you are using – the best bet is to order the stickers and ribbons from the same vendor to ensure that they are compatible.

Keep in mind that the stickers have a limited life span, and as they age they will lose their ability to hold the resin effectively.

QuickTouch can use a 2" by 2-5/8" or 4" by 2-5/8" label, and can print Date, Mileage, Oil Grade, and four customized lines for the name, address, and telephone number of the lube center. See the Sticker Setup section of this manual for more information.
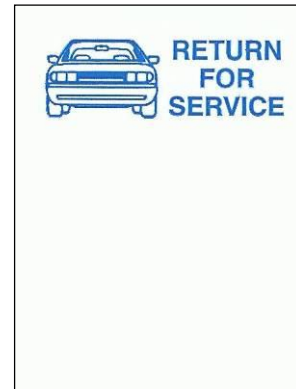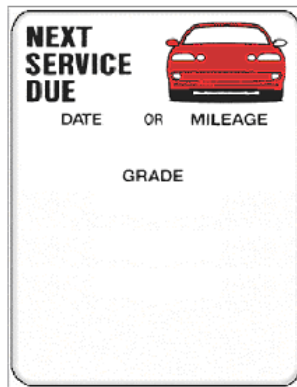
Customized labels are available from several vendors. Contact Sage Support if you have questions about which sticker formats are supported in QuickTouch.

Instructions for reloading stickers and ribbon are included with the printer.

Godex RT700i Sticker Printer

Godex EZPi-1200 Sticker Printer

Cognitive Advantage LX Sticker Printer

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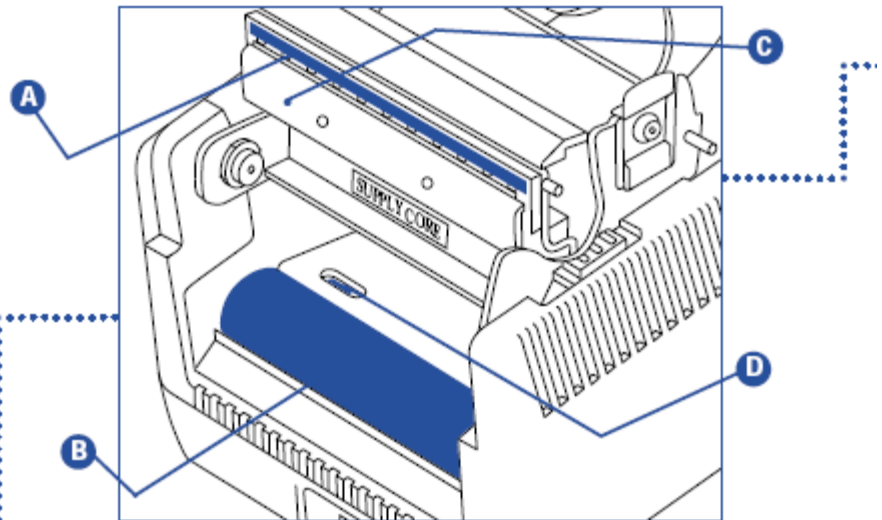
Clean the print head **A**, drive roller **B** and the index sensors **C** and **D** with a soft, lint free cloth lightly saturated with 99% isopropyl alcohol. Press the FEED button to clean all sides of the roller.

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

Legacy Printers

Sage Microsystems no longer supplies the following printers. These printers are compatible with QuickTouch and still in use by some of our customers. If you are interested in replacing your printer, please call our Sales department at 800.724.7400.

HP CP1518ni Color Laser Printer

The HP CP1518ni color laser printer is used for invoices and the Service Maintenance Schedule (also known as "the gauges"). The CP1518ni is network ready and can use plain copy paper or "multi-use" paper available at any retail or office supply store.

Invoices may be preprinted invoices, or plain paper invoices. See the Invoice Setup section on page 146 for different invoice format examples.

Toner cartridges contain the "ink" that the laser printer puts on the paper (it's actually a dust made of plastic resin that is melted onto the paper). You will want to purchase at least one extra toner cartridge to keep on hand for when you need to replace the one in the printer.

- Paper – Use regular copy paper (~1¢ pp)

- 30,000 page monthly duty cycle

- 12ppm (Black), 8ppm (Color), 96MB, 26sec to first print

- Toner Cartridges

    o Black Mfg# CB540A (yields 2,200 pages)

    o Cyan Mfg# CB541A (yields 1,400 pages)

    o Magenta Mfg# CB542A (yields 1,400 pages)

    o Yellow Mfg# CB543A (yields 1,400 pages)

    o CMY (Combo: Cyan, Magenta, Yellow) Mfg# CE256A (yields 1,400 pages/each toner cartridge)

Lexmark E232 Laser Printer

Lexmark E232 Laser Printer

Lexmark E232t Laser Printer (Note the additional 550-sheet bottom paper tray so that two types of paper can be used, preprinted invoices and plain paper).

The Lexmark E232 printer is used for Work Orders, Invoices, Reports, and Reminder Cards.

The only difference between the E232 and the E232t models is the additional bottom paper tray on the 232t. This allows the user to use pre-printed invoices in the top tray, and plain paper in the bottom tray, all from the same printer.

Laser printers use plain copy paper or "multi-use" paper available at any retail or office supply store.

Invoices may be preprinted invoices, or plain paper invoices. See the Invoice Setup section on page 146 for different invoice format examples.

Toner cartridges contain the "ink" that the laser printer puts on the paper (it's actually a dust made of plastic resin that is melted onto the paper). You will want to purchase at least one extra toner cartridge to keep on hand for when you need to replace the one in the printer.

Toner cartridges feature a higher initial cost ($94 for the 2,500 page toner cartridge at a local office supply store) compared to a pin-fed printer ink cartridge ($17), but will yield a very large number of printed pages and is actually cheaper than the usual two-part, continuous fed invoices. For an example price comparison, I priced on the internet 10,000 preprinted continuous-fed 1-color forms for $570, and a $17 ink cartridge, which averages out to about 5.9¢ per page. For the laser printer, the cost per page is about 4.8¢ per page (3.8¢ for the toner and 1¢ for the plain laser paper). Thus, the laser printer yields a savings of $110 over 10,000 invoices. Note also that Lexmark offers a recycle program through third party vendors which may allow even more savings. (There are also "Toner Refill Kits" which allow you to refill the toner

cartridge yourself for much less – you have to drill a hole in the cartridge and then pour in the toner. Sage does NOT recommend these as they can damage your printer and may also void any manufacturer warranty).

In the 232 model printer, the toner cartridge actually sits inside the photoconductor unit which is also a replaceable part.

- Paper – Use plain copy paper (~1¢ pp)

- 10,000 page monthly duty cycle

- 22ppm, 16MB, <8.5sec to first print

- Toner Cartridge
    o Mfg# 12A8300 (yields 2,500 pages, ~3.8¢ pp)
    o Mfg# 12A8400 (Lexmark Return Program, ~3.0¢ pp)
    o Mfg# 12A8302 (Photoconductor unit, yields 30,000 pages)

Lexmark E323 Laser Printer

The Lexmark E323 printer is used for Work Orders, Invoices, Reports, and Reminder Cards.

Laser printers use plain copy paper or "multi-use" paper available at any retail or office supply store.

Invoices may be preprinted invoices, or plain paper invoices. See the Invoice Setup section on page 146 for different invoice format examples.

Toner cartridges contain the "ink" that the laser printer puts on the paper (it's actually a dust made of plastic resin that is melted onto the paper). You will want to purchase at least one extra toner cartridge to keep on hand for when you need to replace the one in the printer.

Toner cartridges feature a higher initial cost ($178 for the 10,000 page toner cartridge at a local office supply store) compared to a pin-fed printer ink cartridge ($17), but will yield a very large number of printed pages and is actually cheaper than the usual two-part, continuous fed invoices. For an example price comparison, I priced on the internet 10,000 preprinted continuous-fed 1-color forms for $570, and a $17 ink cartridge, which averages out to about 5.9¢ per page. For the laser printer, the cost per page is about 4.6¢ per page (3.6¢ for the toner and 1¢ for the plain laser paper). Thus, the laser printer yields a savings of $130 over 10000 invoices. Note that the savings would be greater with the "high capacity" toner cartridge. Note also that Lexmark has a recycle program which may allow even more savings. (There are

also "Toner Refill Kits" which allow you to refill the toner cartridge yourself for much less – you have to drill a hole in the cartridge and then pour in the toner. Sage does NOT recommend these as they can damage your printer and may also void any manufacturer warranty).

- Paper – Use regular copy paper (~1¢ pp)

- 15,000 page monthly duty cycle

- 20ppm, 16MB, 9.5sec to first print

- Toner Cartridge
    - Mfg# 12A7300 (yields 10,000 pages, ~3.6¢ pp)
    - Mfg# 12A7305 (yields 25,000 pages, ~2.6¢ pp)

HP LaserJet 1300 Laser Printer

The HP LaserJet 1300 Laser printer is used for Work Orders, Invoices, and Reports. It replaces the Okipage 14ex and the Okidata 320/320Turbo printers.

The HP uses plain copy paper, available at any office supply store or retail stores.

The HP also uses toner cartridges. Toner cartridges contain the "ink" that the laser printer puts on the paper (it's actually a dust made of plastic resin that is melted onto the paper). You will want to purchase at least one extra toner cartridge to keep on hand for when you need to replace the one in the printer. Toner cartridges feature a higher initial cost compared to a pin-fed printer ink cartridge, but will yield a very large number of printed pages and may actually be cheaper than the usual two-part, continuous fed invoices.

Note that the 1300 printers do not support the Sage Laser Reminder Cards feature.

Note also that the 1300 printers have a limited duty cycle – 10,000 pages per month. This printer is not recommended for high volume stores.

Okidata Microline 420Turbo

The Okidata Microline 420Turbo pin-fed printer has been called the workhorse of the auto-care industry. This printer is used when you need two-part forms to be printed (for instance, where you wish to keep a signed copy of the invoice). This printer can also be used to print Reminder cards.

These printers feature a "Top of Form" function which will automatically line up the paper to the proper position. Use the "Park" button to feed the paper out the back. Use the "FF/Load" button to feed the paper in to the proper position.

Press the SEL button if necessary and make sure that SEL is illuminated. SEL means that the printer is in online mode and ready to print. If the SEL is not illuminated then the printer will not print.

APC Uninterruptable Power Supply (UPS)

APC BE650G

The APC Back-UPS BE 650G Uninterruptable Power Supply provides both surge protection and battery backup. Note that it MUST be plugged into a grounded, standard 3-prong outlet. The circuitry inside the surge protector will channel any surges or EMI coming through the AC wires back down the ground wire.

The network connectors on the far edge of the UPS can be used for either 8pin network cables, or 4pin phone wires.

A computer is not fully protected against surges unless ALL the wires and peripherals going into it are also protected. Thus, a phone wire plugged directly into the back of the computer makes it vulnerable to lightning strikes. All wires and peripherals must be protected.

Note that there is a warranty that, if filled out, will give you up to $50,000 of protection for your computer equipment in the event that a lightning strike or power surge damages it. The warranty card is included with the surge protector, or can be done online at www.apc.com (click on Support, Warranty Registration).

If the power should fail, the battery inside the UPS will keep the computer running for about 8 minutes. This gives you time to either fix the problem (need to reset the circuit breaker perhaps), or to shut down the computer properly (in the event of a total blackout). Note that only one side of the UPS provides battery backup, the other side provides surge protection only. Only the computer, the monitor, and the network router (if you have one) should be plugged into the battery side, as anything else will quickly drain the battery.

Note the red Site Wiring Fault indicator. If this is lit, then the outlet the UPS is plugged into is not properly grounded, and the UPS will not work properly. Contact a qualified electrician. The UPS must be plugged into a properly grounded 3-prong outlet. Do not use an adaptor or otherwise modify the plug.

Battery Backup &
Surge Protection
Side

Surge
Protection Only

Network Hardware
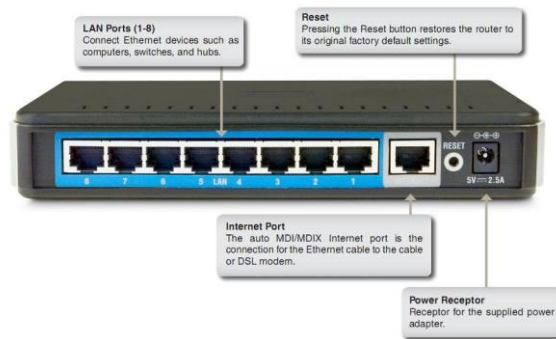
The Sage system utilizes standard network architecture, most of which can be purchased at a local electronics store. A standard package setup from Sage includes a 4 port router and an 8 port switch. The switch gives the computers the ability to run at faster, gigabit speeds. The router handles the more sophisticated DHCP server capabilities as well as other extended features. The D-Link DIR-130 Router pictured above is an example of what most routers and switches look like.

Each computer on the network has an 8-pin network cable plugged into a port on the back of the router. If the computer is on, you should see two green lights (or 1 green 1 yellow) on the front of the router indicating that there is connectivity between the computer and the router. Each pair of lights corresponds to each computer on the network. Each pair of lights is numbered and these correspond to the port number on the back of the router.

The power supply for the router must be plugged into a surge protector, and if possible into the battery side of the UPS (Battery Backup).

You may hear various terms used for the router, such as "hub" or "switch". Hub, switch, and router are often used interchangeably to describe the network device, but "Router" in this case is the correct term. The difference is that a router assigns network addresses to computers – with a hub or a switch, a technician would need to manually assign a network address to each computer.

Due to security and reliability concerns, Sage recommends that all QuickTouch computers with access to the internet have anti-virus software installed and kept up-to-date. This will prevent the QuickTouch computers from being infected with viruses, worms, and other internet threats, as well as minimize employee internet abuses, such as visiting pornography or gambling websites.

The Mouse

Left-Click Button   Right-Click Button

In Windows, the different buttons of the mouse perform different functions. Pressing the left-click button once will select an object or press a button. Right-clicking the mouse will bring up a list of options depending on the object you right-clicked.

In QuickTouch, the right-clicking function is disabled. The left-click button performs the same function as pressing on the screen.

In Windows, a "Double-Click" means pressing the left-click button twice in rapid succession. This will perform an action like launching a program. You launch QuickTouch by double-clicking the QuickTouch icon on the Windows desktop.

The Keyboard
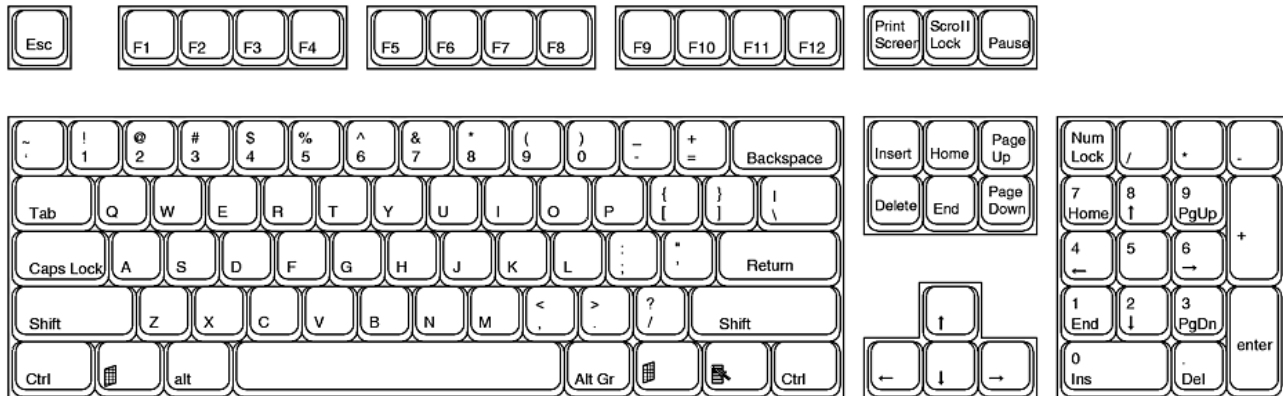
Our DOS system, and some competitors' products, require special keyboards. Because QuickTouch is a Windows program, it uses the standard Windows keyboard.

You may purchase a keyboard cover for your keyboard separately. If a keyboard ever needs to be replaced, you can purchase locally any standard PS/2 or USB Windows keyboard (depending on your computer).

If you are having trouble with the number keypad on the right of the keyboard, make sure that the "Num Lock" key is pressed on. You will see the "Num Lock" light show green if it is turned on.

Note that the Caps Lock and Tab keys do not function in QuickTouch. This is by design to ensure ease of use and minimize confusion for those new to computers.

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Installing Your New System

After purchasing your new QuickTouch system, an installation date will be scheduled. A Sage Installation Technician will arrive at your site and spend several days configuring your system, and training your crew in its use.

Your Installation Technician will set up and test all hardware components, and configure the following areas of QuickTouch:

- Configure General Setup Options

- Configure Coupons, Discounts, Payment Methods

- Configure Services

- Enter Employees

- Enter Vendors

- Enter Inventory Part Codes and Retail Prices

- Enter Inventory Costs and On-Hand Amounts

- Enter Inventory Minimum/Standard Order settings, or set all items to "Auto" for reordering.

- Enter Fleet Accounts

- Enter Fleet Account starting balances

To expedite the setup and training, and to maximize your training time, you should have organized and listed all of the above items on the Sage provided worksheets.

You should also plan on being at the store the entire time of the installation dates. All of your key employees should also be scheduled to be at the location the entire time.

Navigating QuickTouch

QuickTouch is optimized for speed and ease of use. You can use the Touch screen, mouse, or keyboard to navigate anywhere within the system.
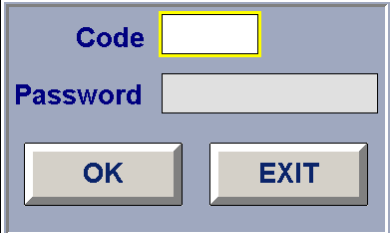
QuickTouch:

1. Launching QuickTouch
2. Navigating Through The Menus
3. QuickTouch Security
4. Exiting QuickTouch
5. Report Printing Options

Launching QuickTouch

On your Windows Desktop, look for the QuickTouch icon. Double-click (using the mouse or by touching the screen) the icon to launch QuickTouch.

You will be prompted for your Code and Password. Enter these and press OK. This will bring you to the QuickTouch Main Menu.

Navigating Through The Menus

Everything starts from the Main Menu. To navigate to a particular area, press on the corresponding button.

Note the "Cancel" button at the top of the screen. The "Cancel" button will take you back to the Main Menu screen from any other screen in the system.

The "OK", "Cancel", "Back" and "Forward" buttons are context sensitive and have different functions in different areas of QuickTouch. Generally, Forward will bring you to the next screen, and Back will bring you to the previous screen. OK will save any changes on a screen, and Cancel will exit you from a screen without saving changes.

On most screens you will see the "ClockIn" button. Press this button to clock employees in or out, or to view who is currently clocked into the time clock.

Pressing the "Exit" button will bring up the QuickTouch Security Window. This will allow you to either log on under a different security code, or to exit out of the system.
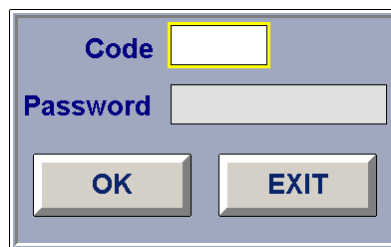
QuickTouch Logon Window

QuickTouch Security

QuickTouch provides different levels of security for different users. To set this up, please see the Security Group Maintenance section on page 99.

Basically, there are different Security Groups (Owner, Manager, Cashier, Technician, etc), and each employee is assigned to a particular group. Each employee is also provided a Code (1-3 digits) and a password (any combination of letters or numbers). Depending on the Security Group that the employee belongs to, he will be able to view certain screens and be denied access to other screens or functions.

When you initially launch QuickTouch, you are presented with the Logon window.

QuickTouch Logon Window

When you log on with a code and password, that employee's security group is loaded into the system.

To change the security group that is loaded, press the "Exit" button on the Main Menu. You will be presented with the Logon screen again, and you can log on with a different code and password.

Note that once a security code is logged on, that code will stay logged on until you hit the "Exit" button again. Thus, if you are an owner or manager, you will want to hit the "Exit" button before walking away from the computer, or else anyone who walks up to the computer next will have YOUR security access.

Many owners and managers create two separate logons for themselves, one with full access and one with limited cashier access. They would normally use the code with Cashier access throughout the day – this way, if he walks away from the computer forgetting to log off, the next employee will not have any greater access than Cashier.

QuickTouch Security Override Window

Certain functions in QuickTouch will require a Security Override. Some functions (such as Day End Processing) will always prompt for an Override code, and other functions (such as Inventory Restocking) will prompt for the Override code if indicated to do so in Security Setup. These security functions will help the owner in maintaining positive control over the system, while allowing the employees sufficient security for common tasks.

Security Override

Override Code

Password

OK   Login As   Cancel

When the Security Override Window is displayed, enter the Code and Password of a user with sufficient security access for whatever the function is. Pressing OK will allow the user temporary access into that function. Pressing Login As will allow the user temporary access into that function, but will also log the code into security.

Scenario 1

An employee logs himself into QuickTouch. The employee needs to restock inventory. The employee navigates to the Inventory Restocking screen but is then presented with the Security Override Window. The manager uses his own code, and presses OK. The employee can now restock inventory, and when he completes his task and cancels from the restock screen, he is again logged into QuickTouch under his own code.

Scenario 2

An employee logs himself into QuickTouch. The manager needs to restock inventory and navigates to the Inventory Restocking screen, and is then presented with the Security Override Window. The manager, knowing that he also needs to change some service prices and run some reports from a previous day, uses his own code and presses Login As. The manager can now restock inventory, and when he completes this task and cancels from the restock screen, he is now logged into QuickTouch under his own manager code, and can go directly to the other areas of the system with his own security. When the manager completes all of his tasks and is leaving the computer, he will hit the Exit button, bringing up the QuickTouch Security Window. The employee will now use his own code to log into QuickTouch and continue with his work.

Important!

It is very important that managers and owners, and other employees with high security access into the system, always hit the Exit button before walking away from a computer.
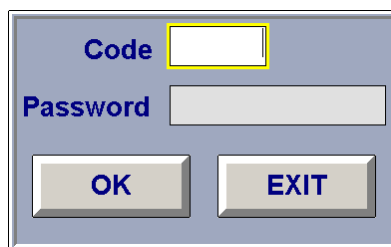
Exiting QuickTouch

To exit QuickTouch, from whichever screen you are in, press the "Cancel" button until you reach the Main Menu. You can you press the F1 Key (located above the number keys on the keyboard) until you are out of QuickTouch.
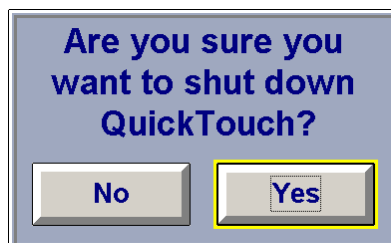
From the Main Menu, press the "Exit" button.

You will be prompted with the Logon Screen. THERE IS NO NEED TO USE YOUR CODE AND PASSWORD.

Press the GRAY Exit button on the Logon screen.

You will be asked if you want to shut down QuickTouch. Say Yes.

QuickTouch will close, and you will be returned to the Windows Desktop.

Report Printing Options

For any report in QuickTouch, you have several options for viewing and printing the data.

Print

Sends the report directly to the printer.

Print Preview

Print Preview allows you to view the report on the screen. The report will appear on the screen exactly as it would appear on printed paper. Note that the screen only displays HALF of the page, the top or bottom half. To switch between the top and bottom half of the page, use Up/Down arrows to the right of the report.

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

From the Print Preview screen, you can also choose to send the report to the printer. Pressing the Print button from this screen will give you several options.

- **Whole Document** Prints the entire document.
- **Current Page** Prints only the page displayed on the screen.
- **Range of Pages** Allows you to specify which pages to print.

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Cash Register Mode

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

The Cash Register Mode menu has the following options:

1. Bay Screen

2. Daily Statistics

    o   X-Tape

    o   Employee

    o   Service Statistics

3. Cash Register Functions

    1. Void Invoice

    2. Refund Invoice

    3. Pay In

    4. Pay Out

    5. Open Cash Drawer

    6. Starting Drawer Fund

4. Reprint Invoice

5. Print Generic Sticker

6. Estimate

7. Inventory Check

8. Restore Invoice

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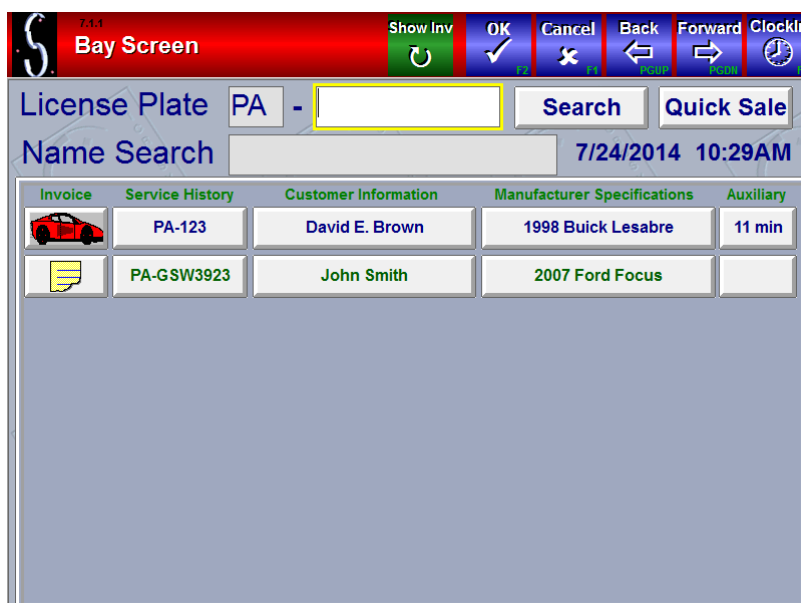
The Bay Screen is where you initiate sales and create your work orders and invoices.

In this example, a customer has been checked in, and a work order created. Thus, the car is listed on the Bay Screen. Subsequent cars will also be listed on this screen until they are checked out and the invoice printed. There is no limit as to how many cars can be placed in the bay – if there are more than seven cars in the bay, scroll arrows will appear at the right so that you may view all vehicles in the bay.

License Plate – Type the license plate in the field to initiate the sales process.

Name Search – Use the Name Search field if the vehicle is not found in the system using the license plate, but you know that the vehicle has visited previously. A common problem is that the license plate was misspelled on the previous visit, so using the name search will allow you to select that vehicle and correct the mistake.

 Pressing the Red Car button will start the invoicing process.
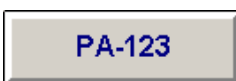
 Pressing the Customer History button will allow you to view and print the entire history for that vehicle, or to reprint an old invoice.

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

 Pressing the Vehicle Information button will allow you to view or print the Sage Service Manual or Service Maintenance

Schedule ("The Gauges") for this vehicle, containing information about severe service manufacturers' recommendations, fluids, fluid quantities, and other information.

 The Auxiliary button displays how long the vehicle has been in the bay. This time starts from the moment the license plate is entered and continues until the vehicle is checked out. Pressing this button will present you with several options:

- Delete From Bay – use this option to delete the vehicle from the bay without creating an invoice. You may be prompted for a security code (see Security Setup) in order to do this. Note that although the vehicle will be deleted from the bay, it will still print on the Daily Activity Report with a "Bay Delete" status.

- Reprint – this function will allow you to reprint the work order, Sage Service Manual, Sage Maintenance Schedule or the static sticker.

- Park (Unpark) – "Parking" a vehicle means that you completed the service but for some reason are unable to cash out the customer (as in, the vehicle was dropped off and the customer will return later). Park the vehicle in this case so that the bay time will not continue to tick and skew your averages. If the vehicle is already parked, you can Unpark the vehicle so that the time will continue to accrue.

- Cancel – this will bring you back to the bay screen with no action taken.

 Estimates that are on the bay screen will show up as a piece of paper icon to differentiate it from invoices. Pressing this button will take you into the Estimate for modification or to convert it to an Invoice.

| PA-GSW3923 | John Smith | 2007 Ford Focus | |

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

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

Search The Search button will provide a richer search functionality than the name search described above. You can search on any combination of the fields listed.

Customer and Vehicle Search

Customer Name	
Zip Code	
City	State
Home Phone	
Lic. Plate w/o State	
VIN	

Search   Cancel

Note that when you do a Search or a Name Search by Customer Name, you will be presented with an option to search "First Letters" or "Anywhere in Name".

Search First Letter(s) or Anywhere in Name

First   Any

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

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

The top bar includes a green Invoice/Estimate toggle button. This is used to filter the bay screen view from showing All bay screen entries, only Invoices, or only Estimates. Each touch of the toggle button selects the next view.

Daily Statistics

The Daily Statistics screen provides real-time sales statistics for the facility.

Business Group

If you have Business Groups configured (Lube, Car Wash, Impulse, etc) you can press the Bus Group button to see a separate breakdown for each group.

Employee

Selecting the 'Emp' button displays employee specific statistics (car count, ticket average, etc.) for the day and comparisons to other employees' statistics.
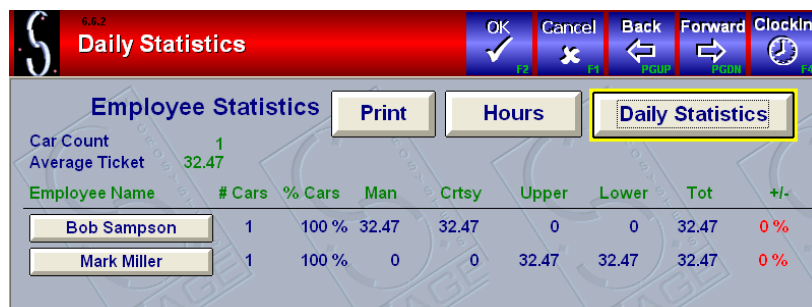
Select the specific employee

By touching any of the employee names listed, a breakdown of their individual sales can be seen.

Service Name	# Svc	% Svc	Man	Crtsy	Upper	Lower	Tot
Check Tire Pressure	1	100	0	0	0	1	0
Full Service Oil Change	4	100	0	0	0	4	223.01
Bulk	1	100	0	0	0	1	31.49
High Mileage	1	100	0	0	0	1	35.49
Syn Blend	2	100	0	0	0	2	156.03

Hours

By selecting the Hours button from the Employee Statistics screen, a breakdown of each employee's hours will be shown for the day, current week and previous week. The report also displays whether each employee is currently clocked in or not. There is also sales detail for each employee for the current day and the current week. This report is useful for keeping labor costs under control by seeing which employees are nearing overtime.

Statistics - Employee Hours

Employee Name	Clocked	Hrs Day	Sales/Hr Day	Hrs Week	Sales/Hr Week	Hrs Prev Week	Sales/Hr Prev Week
Bob Williams	IN	1:55	43.29	22:59	33.06	33:00	20.39
Brian Jones	OUT	0	0	21:00	7.66	26:30	5.28
Joe Wilson	OUT	0	0	22:37	22.81	0	0
Rich Lewis	IN	2:10	38.30	24:07	31.51	33:32	20.07
Ron Young	IN	1:55	43.29	17:44	42.85	27:52	24.15

X Tape

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

Service

The Service Statistics button will provide the number, dollar amounts, and percentages of services performed on the current day, and can print graphs of each.

Service Statistics

Graph Graph   Graph   **Daily Statistics**   **Print**

Service	# Sold	% Cars	$ Sold	% Sales	Service	# Sold	% Cars	$ Sold	% Sales
Full Service	3	100	85.47	34.8					
Air Filter	1	33	0.00	0.0					
Automatic	2	67	99.98	40.7					
Front Diff Service	2	67	39.98	16.3					
Transfer Case	1	33	19.99	8.1					
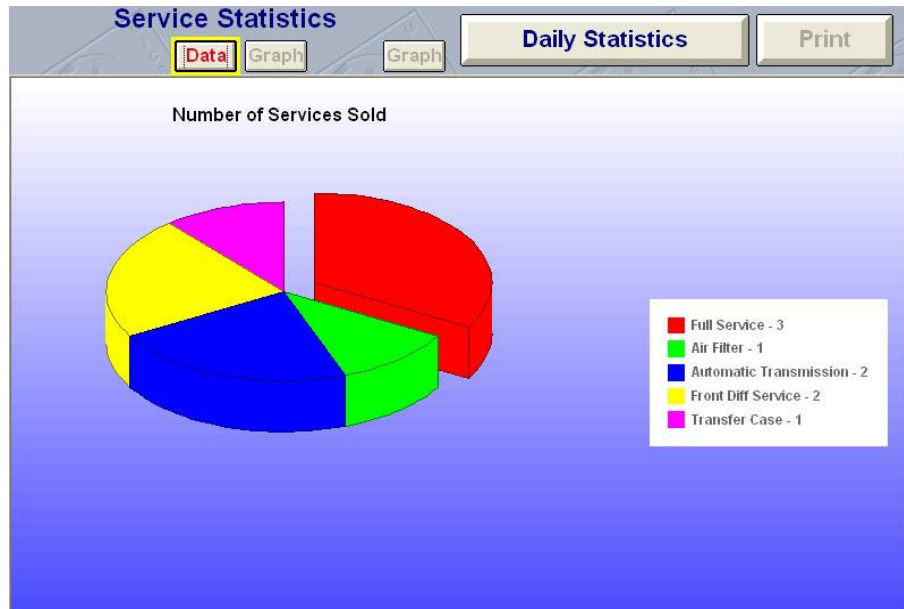
Print

The Print button will print the Daily Statistics.

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

Cash Register Functions

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

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

The following functions are available:
1. Void Invoice
2. Refund Invoice
3. Pay In
4. Pay Out
5. Open Cash Drawer
6. Starting Drawer Fund

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

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

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

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

If money was actually refunded to the customer, you should use the Refund function, not the Void function to ensure an accurate Day End Processing.

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

Enter the Invoice Number to Refund	2811
Pay Type Refunded	**Cash**

Reason

Noah Wilson
35 Lake Shore Dr.   895-623-1005
Exton, PA 19341

Invoice Number: #2811
05/09/10 07:59 $81.58 Cash
Full Service, Tire Rotation, Wiper Blades, Wiper Blades

2006
FORD
FOCUS
E-N   4-C 2.0L (121) FI   [N
Lic Number: DKF9456

Search   OK   Cancel

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

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

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

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

Open Cash Drawer – Use this function to open the cash drawer to make change without having to use the key.

Starting Drawer Fund – Use this function to set the starting drawer amount for the start of the day. Once set, usually you don't need to change this.

Reprint Invoice

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

If you don't know the invoice number to reprint, you can reprint the invoice directly from customer or vehicle history.
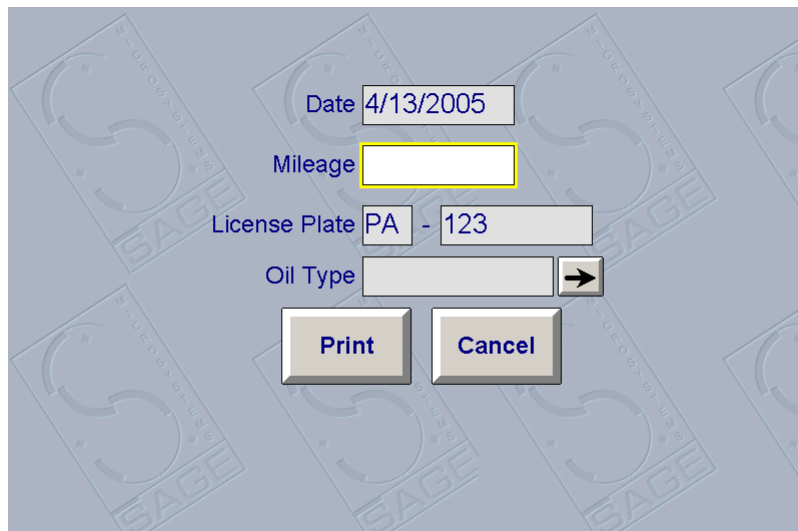
A reprinted invoice will appear exactly as the original, except for a "Reprint" next to the invoice number. If you are using the Buy X Get One Free type promotion, the promotion information won't reprint as it may have been updated since the original invoice.

Voided or Refunded invoices will be marked as such if they are reprinted.

Print Generic Sticker

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

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

Estimate

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

You can have the Estimate print exactly like your invoice format, or if you use preprinted forms, you can choose to print the estimate on an alternate plain paper style format, in order to save invoice paper. A customized note can be setup to print on every estimate and you can control the number of days that the Estimate will stay active before it's automatically deleted. These settings can be changed from the Estimate Setup screen in General Setup Options (8-2).
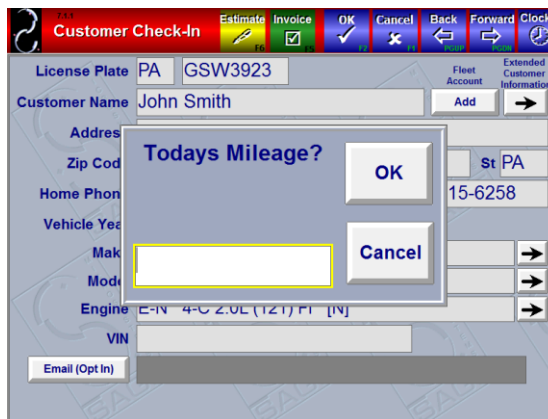
There are two options when creating an Estimate from the Cash Register Menu. The first method is by entering the customer's license plate, which will prompt you to create a new customer record, or pull up the existing customer record. The system will prompt you to enter the current mileage of the vehicle, and then return you to the blue screen to begin adding services.

The second method is the Express Estimate. This option doesn't require the customer information or VIN. You will be prompted to select the Year, Make, Model, and Engine, and then you will be returned to the blue screen for service selection.
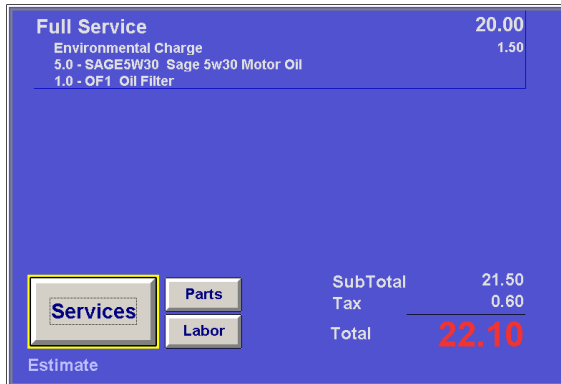
Estimates that are saved to the bay screen will show up slightly different than invoices. Instead of the red car or cash register icon, it will be displayed as a piece paper. Also, all text will be green rather than blue and the Auxiliary button will be blank instead of showing the bay time or invoice amount. For an estimate that was created as an express estimate, since there is no license plate associated with the vehicle, the Service History button will display the date and time that the estimate was created. All other buttons look and function the same as an invoice.
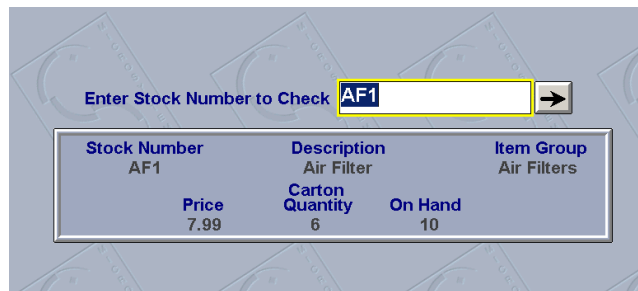
If a customer decides to proceed with the work on an existing estimate, you can open the estimate by touching on the piece of paper icon. Click the Invoice button and you will be prompted to convert the Estimate to an Invoice.

Inventory Check

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

- Stock Number

- Description

- Item Group

- Price

- Carton Quantity

- On Hand Amount

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

Restore Invoice

This function allows you to restore an invoice to the Bay screen after it has been printed and finalized. You can restore the last non-quicksale invoice, or else you must know the invoice number (you can look this up in customer or vehicle history).

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

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

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

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

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Period End Processing

Period End Processing is where you do your day end procedures, and print sales reports for daily, weekly, monthly, or yearly periods.

Note that on our old DOS system or some competitor systems, Week and Month end processing is required to be done on the end-day of that period. THIS IS NOT THE CASE IN QUICKTOUCH. QuickTouch allows you to do any period processing (such as week or month ends) on any date, simply by typing in the end-date or date range for that period.

The Period End Processing menu presents the following options:

1. Till Management
    1. Open Till
    2. Close Till
    3. Undo Close Till
2. Close Current Day
3. Close Current Week
4. Close Current Month
5. Close Current Year
6. Reprint Sales Reports
    1. Daily Sales Report
    2. Weekly Sales Journal
    3. Day End Journal
    4. Exception Report
    5. Daily Activity Report
    6. X-Tape Report
    7. Tax Exempt Report
    8. More Sales Reporting
        1. Co-Op Report
        2. Vital Statistics Report
        3. Sales Description
        4. Pay In/Out Report
        5. Till Report
        6. Daily Sales Summary
7. Undo Current Day End

Till Management

QuickTouch supports the final processing of customers at more than one computer. Each computer can have its own physical cash drawer that gets tracked individually.

Multiple Tills can also be used to track a shift change between cashiers mid-day. This enables each cashier to count their own till before and after their shift, thus making it easier to track down where a variance has occurred.

Please note that the two above descriptions of multiple tills can be used in conjunction with one another. So there could be an AM shift and a PM shift on both bay 1 and bay 2, for a total of 4 tills for that day. In any of the scenarios above, all of the day's tills are combined to reconcile at day end.

To enable this feature, from the Main Menu go to:
8 - System Management
2 - General Setup Options
Forward to Page 2
Owner Setup
Forward to Page 2
Change Multiple Till to 'Yes'

Note: Multiple Tills cannot be turned on or off in the middle of the day

A till must first be opened before a cashier can operate a cash drawer on the system.
To open a till:
Go to
2 - Period Ending Processing
1 - Till Management
1 - Open Till

Count the number of each denomination of currency and enter it into the fields provided. When finished, click OK at the top of the screen. Customers can now be processed in the same manner as a single till environment. At the end of the day or shift, the till must be closed.

To close the till:
Go to
2 - Period Ending Processing
1 - Till Management
2 - Close Till

Once again, count the number of each denomination of currency and enter it into the fields provided. When finished, click OK at the top of the screen. If this is the end of the day, the End-of-Day Process can now be completed as normal (See Close Current Day instructions on page 51). If this is the end of a shift, then a new till must be opened before customer processing can continue on this computer. If no till is opened, then the computer will act as a bay station.

When using Multiple Tills, the End-of-Day process stays the same except that each cashier's drawer total must be verified individually.

Undo Close Till   The Undo Close Till function can be used to correct a mistake on the closing of a till.

Close Current Day

At the day end, you will be counting all the cash in the drawer, and all checks and credit cards. QuickTouch will compare your totals with the system totals and indicate disparities.

Day End Procedure:

1. From the main menu, choose Period End Processing, then Day End. You will be prompted for your code and password to prevent unauthorized access.
If there are any invoices from the day that you know were processed under the incorrect payment method (for instance, the cashier chose Cash instead of Check when invoicing a customer), you must first reconcile this by using the Transfer button. This will allow you to transfer the dollar amount from the incorrect payment method to the correct payment method.

Press the Cash button, and reconcile the cash in the drawer. Note that this cash amount INCLUDES the starting drawer fund.
Proceed to the other payment methods. Note that there are two buttons to choose from when verifying non-cash (or non-fleet) payment methods.

Use the Payment Type button to be prompted with a list of all transactions – the list will indicate the name and the amount of the transaction.

To verify that you have that check (or credit card receipt, as the case may be), press the blank verify button – you will see a check appear indicating that you have verified that payment.

Proceed through the list, and then press OK at the top. If you have a check or credit card receipt that is not in the list, use the Add button to enter that payment in the list. If you have a check that is NOT for the same amount as the Amount button indicates (for instance, maybe the customer wrote the check for $28.58), press the dollar amount key to correct it.
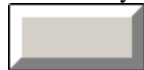
Use the Amount button if you prefer to total the checks yourself (or, if you batch out a credit card machine, you can use the total from that).
After counting cash and reconciling the other payment methods, inspect the Difference column. Hopefully, you should have all zeros to indicate that the drawer balances. If you see discrepancies, try the following:

2. Check for invoices that were processed with the incorrect payment method – this is most likely if you see one payment method short, and another payment method

over for the same amount, as in the example below. Note that they balance each other out so the total balance for all payment methods is zero. To correct this, use the Transfer option described above.

	-24.93
0	0.00
0	0.00
0	0.00
0	24.93
0	0.00

If cash is over or short, check for pay-ins and pay-outs that may not have been recorded in QuickTouch. You will need to Cancel from the day end process (clear your changes) and record the transaction.

3. If cash is short, check for a change box that may contain rolls of change. If this was included with the starting bank, it must be counted with the closing amount.

4. If checks are short, check for any payments-on-account (for fleet accounts). Fleet account payments are included in this section.

5. If cash is consistently over, review your change box (containing rolls of change) procedures – if the change box is NOT included in the cash drawer base amount, then if an employee removes a roll from the box, he would need to put the same amount of cash back in. (For instance, if the change box contains $50, and the cashier runs out of quarters and removes a $10 roll, then if he needs to either do a pay-in, or needs to take $10 from the drawer and put it in the change box. Of course, the separate change box would also need to be counted on a regular basis to ensure that it always contains $50.)

When all payment methods are reconciled, press the OK button at top. The day end reports will print.

After the reports print, you may be prompted to do a backup. You will need a formatted CD/DVD-RW disc or USB Flash Drive. Place a CD/DVD-RW disc in the drive, wait about 30 seconds for the computer to read the CD/DVD (you will see a "CD Ready" message), and then click OK. All QuickTouch data will be compressed and copied to the CD-RW disc. See page 207 for instructions on backing up to a flash drive.

Copying File to Temporary Location: Key.sys

6.0%

Overall Progress

65.2%
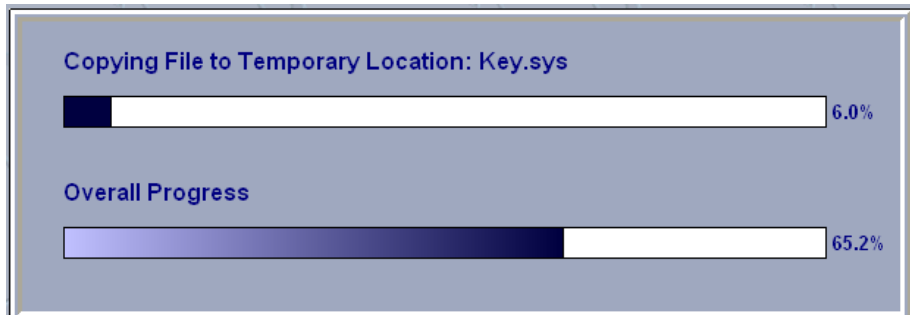
6. After the backup is complete, you will be dropped back to QuickTouch. At this point you can exit out or do anything else you need to do on the computer. Some customers shut down the computer and monitor and all peripherals every night. Most customers simply turn off the monitor and leave the computer and all

peripherals running all night - this does not harm the computer, and it is especially important to leave the computer running if you have nightly communications configured at your location (NexGen customers), or to send information to a reminder card company.

I'm getting too many reports! Or, I'm not getting all the reports I need!

From the Main Menu, choose System Management, General Setup Options, Day End Setup. From here you can choose which reports you want to print.

During the backup, it's asking me to insert a second CD! It's never asked me this before!

It is highly unlikely that there is more data than would fit on a CD. Most likely the CD needs to be reformatted. Follow instructions under the "Format A CD" section.

During the backup, it's saying the disc is write protected!

The CD that is in the drive either is bad or needs to be reformatted. Cancel out of the Backup procedure, reformat the CD or insert a good CD, and complete the backup from the Main Menu, System Management, Daily Data Backup.

Close Current Week

Close Current Week will generate the weekly reports for the time period that you indicate.

The following reports will print when you click OK:

- Weekly Sales Journal
- Weekly Stock Sales Report
- Weekly Employee Time Report
- Weekly Employee Service Report
- Weekly Vital Statistics Report

To turn off any of these reports, from the Main Menu, choose System Management, General Setup Options, Week End Setup.

Sage's old DOS system, and some competitor systems, require that week end processing be done on a particular day (for instance, Saturday evening). Note that in QuickTouch the Week End processing does NOT have to be done on a particular date, you can run the reports for any date range at any time as many times as you need to.

Close Current Month

Close Current Month will generate the monthly reports for the time period that you indicate.

The following reports will print when you click OK:

- Monthly Sales Journal

- Inventory Value Report

- Monthly Stock Sales Report

- Monthly Vital Statistics Report

To turn off any of these reports, from the Main Menu, choose System Management, General Setup Options, Month End Setup.

Sage's old DOS system, and some competitor systems, require that month end processing be done on a particular day (for instance, on the 31st). Note that in QuickTouch the Month End processing does NOT have to be done on a particular date, you can run the reports for any date range at any time as many times as you need to.

Close Current Year

Close Current Year will generate the yearly reports for the time period that you indicate.

The following reports will print when you click OK:

- Yearly Sales Journal

- Inventory Value Report

- Yearly Stock Sales Report

To turn off any of these reports, from the Main Menu, choose System Management, General Setup Options, Year End Setup.

Sage's old DOS system, and some competitor systems, require that year end processing be done on a particular day (for instance, on December 31st). Note that in QuickTouch the Year End processing does NOT have to be done on a particular date, you can run the reports for any date range at any time as many times as you need to.

Reprint Sales Reports

Reprint Sales Reports (from the Main Menu, press Period End Processing, Reprint Sales Reports) allows you to reprint the nightly reports from previous dates.

The following reports are available:

- Daily Sales Report (Single Date)
- Weekly Sales Journal
- Day End Journal
- Exception Report
- Daily Activity Report
- X-Tape Report
- Tax Exempt Report
- Co-Op Report
- Vital Statistics Report
- Sales Description
- Pay In/Out Report
- Till Report
- Daily Sales Summary

- **Daily Sales Report** (Single date) The first page of the Daily Sales Report provides sales statistics for the day. The second page is the Register Summary and lists all incoming and outgoing money, and breaks it down to a final cash drawer total. The page will record the Cashier total, and list the over or short amounts.

- **Weekly Sales Journal** (Single date) This report will assume the week ends on a Saturday, and thus is asking for the Saturday date. The Weekly Sales Journal will list for each day some simple statistics (invoice count, average ticket, services sold, etc.) and compile them into Week-, Month-, and Year-to-Date totals.

- **Day End Journal** (Single date) This report lists all computed and actual cash drawer balances, all non-cash transactions, and a summary showing over or shortage amounts. The Daily Sales report presents a summary of these numbers, but this report provides more details, and is useful for shops that never seem to balance exactly.

- **Exception Report** (Range of dates) This report lists any "unusual happenings" that may indicate money or security abuses. Such actions might include Bay Deletes, Quick Sales that are canceled after the cash drawer opens, any time the cash drawer is manually opened through QuickTouch, miscellaneous Discounts, and Restored invoices. This report should be reviewed daily or periodically to catch any potential abuses of the system. Note how for voided and refunded invoices, both the original invoice date (the Activity Date) and the void/refund date (the Report Date) are listed for comparison.

- **Daily Activity Report** (Range of dates) This report first lists all invoices processed for the date range and any change in status (bay delete or void). The second page will list all Pay-In and Pay-Out transactions. The third page will list all Fleet Account transactions.

- **X-Tape Report** (Single date) This report has been superseded by the Daily Sales Report, but is provided for previous users of the old Sage DOS system.

- **Tax Exempt Report** (Range of dates) This report shows all invoices that were tax exempt. Fleet accounts can be configured as taxable/non-taxable, so the non-taxable fleet invoices would show here. In addition, the cashier can delete the tax from individual invoices by pressing the Tax button on the final Customer Invoicing screen when cashing out a customer.

- **Co-Op Report** (Single date) This report will only be available if the Franchise=Yes option is set under System Management, General Setup Options, Owner Setup (you will need to exit and re-launch QuickTouch in order for the change to take effect). This report provides information that would be of interest to a franchiser/franchisee, such as the percentage of sales that must be remitted from the franchisee to the franchisor.

- **Vital Statistics Report** (Range of dates) This report provides sales, labor, inventory, and customer statistics in a concise format. This report will require some configuration; under General Setup Options, fill in the information on page 2 of Center Defaults.

- **Sales Description** This will print out a list of all formulas used in the Daily Sales Report.

- **Pay In/Out Report** (Range of dates) The Pay In/Out report displays a list of all Pay In and Pay Out transactions for the date specified. This report was formerly only available as part of the Daily Activity Report, but is now available independently.

- **Till Report (Only available if multiple tills is enabled)** The Till Report can be generated by single day or for a date range and for a single or all employees. When using Multiple Tills, the Till Report must be referenced in conjunction with the Day End Journal for the cash drawer detail.

- **Daily Sales Summary** (Range of dates) This report is an abbreviated summary of both the Daily Sales Report and the Vital Statistics Report generated for any date or date range.

Undo Current Day End

This function will allow you to undo all day end activities. The day will need to be closed again. This function would normally only be used to correct a mistake on the day end reports, or to cash through an extra sale that arrived after the day end process had already been finished.

This function will only work for the current date.

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Inventory & Service Management

QuickTouch has been designed from the ground up for ease-of-use, but also provides full functionality and features tailored to the quick lube business. The rubber meets the road here in the Inventory and Services configuration section.

Whether a new install or a conversion, a Sage Installation Technician will be on-site for several days, and will complete as much of the data entry and system configuration as time allows. 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:

1) Inventory Item Maintenance

2) Inventory Group Maintenance

3) Service Management

    1. Service Maintenance

    2. Service Group Maintenance (Loyalty Rewards)

4) Vendor Management

    1. Vendor Maintenance

    2. Create/Edit Purchase Orders

    3. Post Purchase Order

    4. Restore Purchase Order

    5. Reprint Purchase Order

5) Check List Maintenance

6) Inventory Functions

    1. Inventory Restocking

    2. Inventory Adjustments

    3. Transfer Inventory

    4. Receive Transferred Inventory

    5. Cancel Inventory Transfer

    6. Reprint Inventory Transfer

7) Inventory Reporting

How Inventory Works

All of 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 of 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.

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 in order 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.

Still confused? I certainly am! Let's look at some of the other methods.

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 Item Maintenance

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

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

From the Main Menu, choose Inventory & Service Management, Inventory Item Maintenance. You will be prompted with a list of your Item Groups. Choose the appropriate Group.

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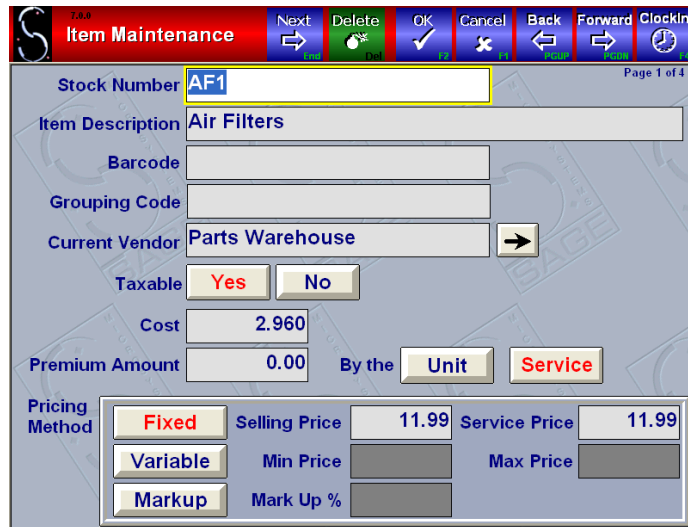
If you wish to delete an item, go into the item and press the green DELETE button at the top of the screen.

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

When you press the Add button or choose an existing item, you will be presented with three screens.

Page 1

- **Next Button** The Next Button 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** The grouping code feature is 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, just choose the most common one, as 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** The upcharge is 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 you an excessive amount, and you wish to charge the customer extra for that particular item. This is the upcharge. For instance, if you budget the cost of an oil filter as $3 as part of your service, but a BMW filter costs you $8, then the upcharge would be $5, or whatever. (If you're not sure, charge the difference between the budgeted cost and the actual cost and round it, as in the example).

- **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.

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

- **Pricing Method Markup** will allow 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, it's like going to a restaurant and ordering lobster, and the price is listed "Market" – the customer will have no idea what it will be until it shows up on the invoice.

Page 2

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

  Alert! Alert! Alert!

  This gets tricky. Let's look at a few examples:

  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.

  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.

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

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

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

  55 Gallon Drums – some "bulk" oils are shipped in 55 gallon drums. Since they are sold in quarts, and there are four 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 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.

- **Order Method** 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

- **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. In this example, all "A" fleet accounts receive a $2.00 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 Interface feature.

- **Sticker Interval Override** This is where the "Oil Type" sticker interval override values are set. In the above example, the sticker intervals are 3 months and 3,000 miles. When the static sticker prints out, the return for service date will be 3 months from the current date and the mileage will be 3,000 miles more than the current mileage.

Page 4

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.

Inventory Group Maintenance

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

From the Main Menu, choose Inventory & Service Management, Inventory Group Maintenance. You will be prompted with a list of your Item Groups. Choose the appropriate Group.

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.

If you wish to delete a group, go into the group and press the green DELETE button at the top of the screen. All inventory must be deleted from the group before you can delete it (Inventory Item Maintenance), and the group must not be assigned to any services before you can delete it (Service Maintenance).

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

Page 1

- **Item Group** Type a brief description of the group here.

- **Select Order** When you're viewing inventory items within this group, this is how they will be ordered. Items will be listed either numerically (AF1, AF3, AF200…) or alphabetically (AF1, AF200, AF3, BR1…), unless you indicate a sort number for each item (this would normally be used only for your Oils).

- **Select Style** When you're viewing inventory items within this group, this determines what will be displayed on the buttons, either the Stock Number or the Description for each item. Usually this will be set to Stock.

- **Assign to Business Group** This is used in the case of locations that have more than one business, for instance Lube and Car Wash. You can indicate here which profit center the inventory is assigned to, so that you can track your inventory separately for each business. Usually this will be blank.

- **General Ledger Accounts Default** Used for QuickBooks Interface feature.

Page 2

- **Outside Reference Manual** QuickTouch incorporates the Motor (Chek-Chart) 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 particular item group.

QuickTouch currently provides part numbers for the following item groups:

- Air Filter

- Breather

- Oil Filter

- PCV

- Cabin Air Filter

- Serpentine Belts

- Fuel Filters

- Wiper Blades

- Transmission Filters

- Lights

- Spark Plugs

- Radiator Caps

Service Maintenance

Service Maintenance allows you to add or remove Services.

From the Main Menu, choose Inventory & Service Management, Service Maintenance. 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.

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

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

Page 1

Service prices can be divided into Parts and Labor, for those localities that do not charge tax on the full service price, only on the parts included in that service. Thus, 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 pricing will prompt the cashier for how much to charge the customer (generally not done). Actual Parts will charge the customer based on the actual parts used during that services (this would be used for services such as Air Filter, Wiper Blade, Fuel Filter, PCV Filter, etc).

- **Parts Taxable** Yes or No. This indicates whether the parts component of the total service price should be taxed. Generally this is Yes.

- **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 pricing 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 more or less for the service.

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

Page 2
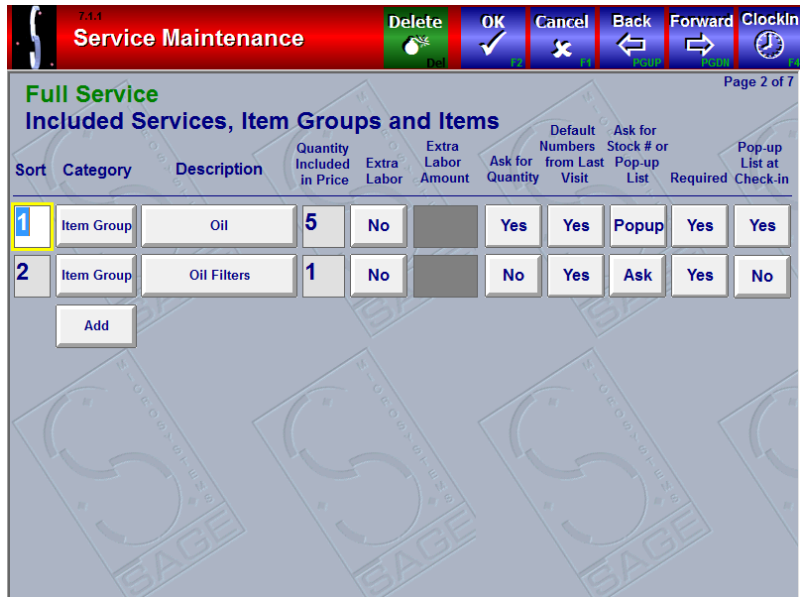
This page allows you to assign parts, part categories, or other services to a service. When you click the Add button on this screen, you will be prompted to choose a Part, Item Group, or Service.

Before jumping in the deep end, let's talk about "services" and "parts" first.

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.

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.

Another type of service would have parts associated with it, but the actual inventory item used might be different for any particular 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.

Finally, 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 here, for a Full Service oil change, we have associated the Oil group and the Oil Filters group. Let's go through the options.

- **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 would 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 particular 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.

Page 3

- **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.

Page 4

- **Assign To Business Group** If a location has more than one profit area, such as Lube, Car Wash, Detail, Convenience Store, etc, you can configure Business Groups and then assign each service to a particular Business Group. Generally this is set to No.

- **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 in QuickTouch, A, B, and C. You can configure a different discount or markup for each pricing category in each service. You can specify for each discount or markup whether it is a fixed dollar amount, or a percentage amount.

  In this 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 Interface feature.

Page 5

- **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 - please note that for oil changes, manufacturers may recommend an oil change interval of 3,750 miles (Nissan 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.

  The following is the list of Chek-Chart services.

  o   Automatic Transmission

  o   Automatic Transaxle

  o   Cooling System

  o   Differential

  o   Engine Oil Change

- o   Final Drive

- o   Manual Transmission

- o   Manual Transaxle

- o   Oil Change

- o   P.C. Valve

- o   Transmission Service

- o   Transfer Case

- o   Transaxle Service

- o   None

- **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.

Page 6

- **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.
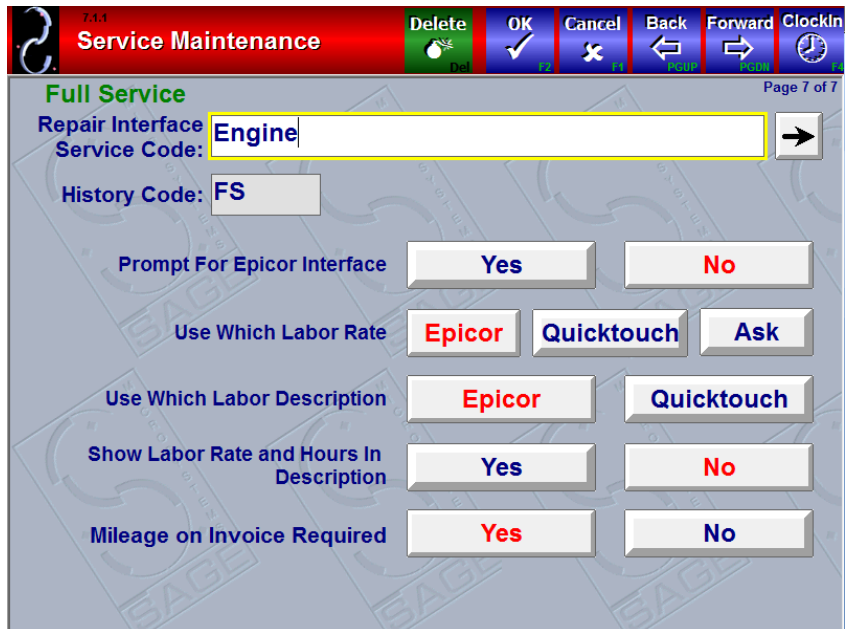
- **Repair Interface Service Code** (Also referred to as the Epicor Job Code) is used to associate a particular service with a Job Code to streamline the Epicor Integrated Service Estimating feature. If a service is linked to a job code, when you launch into ISE, it will take you directly to the appropriate 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** The History Code is 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.

Service Group Maintenance (Loyalty Rewards Program)

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. Basically, it allows you to reward loyalty. This is typical with oil change or car wash services. For those customers we have talked to that plan to implement this, the consensus is to offer a free oil change after 10-12 paid.

There is a lot of consideration programmed into this feature. For example, if all oil changes count towards a free one, which do you actually give the customer (oil and filter, LOF, Basic, Full, Synthetic, etc.). For this, there are now '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 pre-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.

Installation: Step 1 is to set up loyalty reward 'Service Groups'. For example, "Oil Changes". Go to Inventory & Service Management, Service Management, Service Group Maintenance, and touch the 'Add' button at the top. Type in a service group name (i.e. "Oil Changes", "Car Washes"), touch 'Yes' to activate the group, type the number of services required to receive a free one, and then specify whether there is a

specific service that is the free one (touch 'Choose One') or whether any service in the group can be given as the free one (touch 'Any'). If you choose a specific service that will always be the free one and the customer wants a more expensive service (in the group), the system will ask the operator to confirm that the free service will be applied and will simply discount the more expensive service by the amount of the free one.

Step 2 is to go to each service; Inventory & Service Management, Service Management, Service Maintenance, and choose each service that will count towards a free one in the service group. After choosing an included service, page forward to page 6 of service setup. There is a new question asking for 'Service Group:'. Touch 'Choose One' and select the service group that this service will be part of. Every time this service is sold, it will count as one more towards a free service in this service group.

A customer's current count towards a free service can be manually adjusted in the customer record. To change the current count, go to Customer Management, Customer Maintenance, put in the search criteria and locate the customer record. On the customer information screen, there is a button called 'LR Maint.'. Touch that button, choose which service group you want to change the count for, and simply change the current 'Visit Number Counter'. Access to this screen is controlled in Security Group Maintenance. Choose each security group and go to the last entry in the list '***Loyalty Reward Maintenance. In Customer Maintenance.***' and set it to red to deny access or green to allow access for that security group.

Vendor Maintenance

Vendor Maintenance allows you to add all of the distributors of your inventory into the system. You should also add any auto parts stores (Napa, AutoZone, etc) or retail stores (Wal-Mart, Sam's Club, etc) from whom you might purchase parts or equipment.

From the Main Menu, choose Inventory & Service Management, Vendor Management, Vendor Maintenance. You will be prompted with a list of your Vendors. Choose the appropriate Vendor.

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.

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

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

Page 1

Vendor Name Required.

Address, Zip Code, City, State, Contact, Phone One These fields are optional, but useful if you use the Purchase Order feature.

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

Page 2

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

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

Create/Edit Purchase Orders

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.

Creating a Purchase Order is straightforward. From the Main Menu, press Inventory & Service Management, Vendor Management, Create/Edit Purchase Order.

You will be prompted to choose a Vendor. After choosing the Vendor, 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 above.

Note that 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 Orders

After creating and printing your purchase order, you will receive a shipment from your distributor. At this point you are ready to post the purchase order.

To Post the Purchase Order, from the Main Menu, press Inventory & Service Management, Vendor Management, Post Purchase Order.

You will be prompted to choose a 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 screen.

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 to post the Purchase Order. All of 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.

To Restore a Purchase Order, from the Main Menu, press Inventory & Service Management, Vendor Management and Restore Purchase Order.

You will be prompted to enter your code and password to restore a purchase order. 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. After entering your code and password, you will see all of 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.

If you are restoring a purchase order, the screen should look similar to the example above. In our example we are restoring PO#1for Parts Warehouse. 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.

Reprint Purchase Order

The Reprint Purchase Order feature allows you to reprint old purchase orders that have been posted and display any revisions that have been made to a purchase order.

To Reprint a Purchase Order, from the Main Menu, press Inventory & Service Management, Vendor Management and Reprint Purchase Order.

You will be prompted to select the vendor from which you wish to reprint a purchase order. After selecting a vendor, you will see a list of purchase orders that have been posted for this vendor.
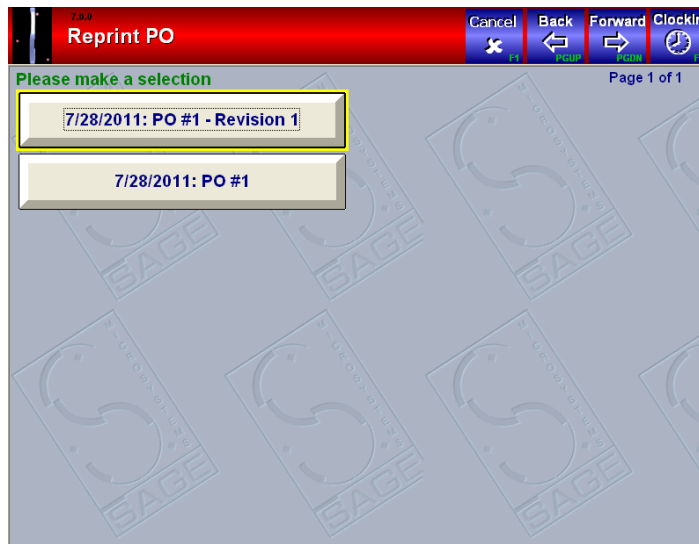
Above is an example of what your screen may look like. In our example, we have two items available to reprint. The first option to reprint is "7/28/2011: PO #1 – Revision 1". This option was created from restoring a purchase order, making changes and reposting it. "7/28/2011: PO #1" is the original posted purchase order. 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.

From the Main Menu, choose Inventory & Service Management, Check List Maintenance. You will be prompted with a list of your Check Lists. Choose the appropriate Check List.

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.

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

When you're viewing a Check List, press OK to save any changes, or CANCEL to quit without saving changes.

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 have moved up a row.

	CheckList Name Full Service Oil Change			Page 1 of 1
1	Lubrication Points →	11	Power Steering Fluid	→
2	Transmission →	12	Battery	→
3	Front Differential →	13	Radiator Fluid	→
4	Rear Differential →	14	Washer Fluid	→
5	Transfer Case →	15	Vacuum Interior	→
6	Air Filter →	16	Wash Windows	→
7	Breather →	17	Front Tires	→
8	Pcv →	18	Rear Tires	→
9	Wiper Blades →	19		→
10	Brake Fluid →	20		→

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

Note the ? button. Press this to configure a question for the check point – when checking out a vehicle, when you select that option for the check point the technician will be prompted with the question. The information he types in will appear on the invoice. In our example, we're prompting the technician for a reason why he can't check the Front Differential fluid.

Finally, note all the "No" buttons under the "Default If Service Sold?" heading. This allows you to associate a service to a particular check point option. In this case, if the Front Diff Service is sold, the Front Differential check point will automatically be set to Changed.

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 will need to restock using this screen.

From the Main Menu, choose Inventory & Service Management, Inventory Functions and Inventory Restocking. You will be presented with the Inventory Restocking screen.

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.

To restock 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

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.

From the Main Menu, choose Inventory & Service Management, Inventory Functions, and finally Inventory Adjustments. You will be presented with the Inventory Adjustments screen.

OK and Cancel on this screen 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.

Inventory Transfer

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

From the Main Menu, choose Inventory & Service Management, Inventory Functions and Transfer Inventory. You will be presented with the Inventory Transfer screen.

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. 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.

From the Main Menu, choose Inventory & Service Management, Inventory Functions and Receive Transferred Inventory. You will be presented with the Receive Transferred Inventory screen.

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 touch Yes.

Inventory Reporting

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

The following reports are available:

- Item Listing Report
- Inventory Value Report
- Inventory Worksheet
- Stock Reorder Report
- Vendor Listing Report
- Stock Sales Report
- Service Listing Report
- Non-Service Labor Detail Report
- Non-Service Parts Detail Report
- Inventory Value Snapshot
- Inventory Restocking Report
- Inventory Adjustment Report
- Inventory Transfer Report
- Inventory Reconciliation Report
- Certificate Activity Report
- Certificate Omission Report

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.

Item Listing Report Lists inventory item details for each stock number.

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.

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".

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).

Vendor Listing Report Lists all Vendors and contact information.

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.

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

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.

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.

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.

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.

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

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

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

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

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

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

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Employee Management

QuickTouch provides a time clock function and security settings for all employees. In addition, you can track employee sales statistics and commission through several different reports.

The Employee Management menu presents the following options:

1. Employee Maintenance

2. Security Group Maintenance

3. Employee Clock In/Out

4. Time Clock Adjustments

5. Employee Reporting

   1. Employee Profile

   2. Employee Time Sheet

   3. Employee Earnings

   4. Employee Sales Tracking

   5. Employee Service

   6. Time Clock Audit

   7. Bi-Weekly Time Sheet Summary

   8. Employee Productivity

6. Employee Reactivation

Employee Maintenance

Employee Maintenance allows you to add or remove Employees.

From the Main Menu, choose Employee Management, Employee Maintenance. You will be prompted with a list of your Employees. Choose the appropriate Employee.

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

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

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

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

Note that each employee requires a Code, a Password, and must be assigned to a Security Group. The Code/Password/Security Group combination are used for the employee security functions, and this same employee record also tracks time clock information. Thus, even if an employee will not be using the computer (a lower bay technician perhaps), he still needs to be assigned a Code and Security Group.

Page 1

Employee Name	Rich Lewis
Address	8 Maple Drive

Zipcode	19348	**City**	KENNETT SQ	**State**	PA

Phone one 610-524-1300

Phone two

(Codes Used: 1, 2, 3, 4, 5, 6)

Code 5

Password **********   **Confirm Password** **********

Security Group Owner →

Language English →

English = Anglais, Inglés   French = Français, Francés   Spanish = Espagnol, Español   Page 1 of 2

- **Employee Name** Required.

- **Address** Optional.

- **Zip code, City, State** Optional.

- **Phone** Optional.

- **Code** Required. This is a number up to four digits in length. Note that the code is unique for that employee and cannot be used again. You can see the list of "Codes Used" next to the Code field.

- **Password** Required. It can be any combination of letters or numbers, and is not case sensitive. It should be short enough for the employee to easily type and remember, but not so short that others can guess it. The password, regardless of length, will be masked with 10 asterisks'. The Confirm Password box is used to verify the password and to avoid mistakes.

- **Security Group** Required. Assign the employee to the appropriate Security Group.

- **Language** QuickTouch supports multiple languages, which so far are English, Spanish, and French. Thus, when an employee uses his Code/Password to log onto the system, he will see the menus in the appropriate language. Contact Sage Support to enable this feature.

Page 2

- **Social Security Number** Optional.

- **Date of Hire** Required. Defaults to the current date when adding a new employee.

- **Last Rate Change Date** Required. Defaults to the current date when adding a new employee.

- **Date of Termination** Optional.

- **Regular Pay Rate** Optional. These numbers will affect the Daily Statistics.

- **Overtime Pay Rate** Optional. These numbers will affect the Daily Statistics.

- **Overtime By** Required. Most municipalities require a standard 40 hour work week, over which employees receive at least a time-and-a-half pay rate. Other municipalities might require an 8 hour day, and some might require both. Choose the appropriate Overtime period, which most often would be a 40-hour workweek period.

Security Group Maintenance

Security Group Maintenance allows you to add or remove Security Groups. Assigning an employee to a particular security group allows him access only to the areas of QuickTouch that you approved and selected.

From the Main Menu, choose Employee Management, Security Group Maintenance. You will be prompted with a list of your Security Groups. Choose the appropriate Security Group.

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

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

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

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

Page 1

| Security Group | Cashier | Security Level | 3 |
| Description | Cashier | | |

Main Menu

Allow Access

- Cash Register Mode
- Bay Screen
- Daily Statistics
- Cash Register Functions
- Void Invoice
- Refund Invoice
- Pay In
- Pay Out
- Open Cash Drawer

Deny Access

- Starting Drawer Fund

- **Security Group** Required. Type in a name for the group.

- **Security Level** Choose the appropriate security level (0 being the highest) according to your setup. (See more on Security Hierarchy on page 146)

- **Description** Type in a brief description of the group.

Every screen in QuickTouch is represented by a button here, and you can Allow or Deny access to any screen. To allow a group access to a particular screen, push the associated button to make it green. To deny access, press the button so that it turns red.

Because QuickTouch is menu-based, if you want to allow access to a particular screen, its higher-level menu item must also be allowed. In the example, if you want to allow members of the Cashier group to conduct a Pay-In, then you need to also allow access to the Cash Register Functions menu.

Scroll all the way to the bottom of the list to view several point-of-sale security options. These include:

- Bay Delete (to delete a car from the bay screen).

- Fleet Credit Limit Override (to allow a fleet charge even if that fleet is over the credit limit).

- Loyalty Reward Maintenance In Customer Maintenance

Employee Clock In/Out

Employee Clock In/Out allows you to clock employees in or out of the time clock feature.

You can reach this screen from almost any screen or menu in QuickTouch, by pressing the "ClockIn – F4" button at the top right. You will be presented with a list of all employees, and their current time clock status (In or Out).

This screen is security-enabled, so if a technician is assigned to a security group that does not have access to this screen, he will be denied access.

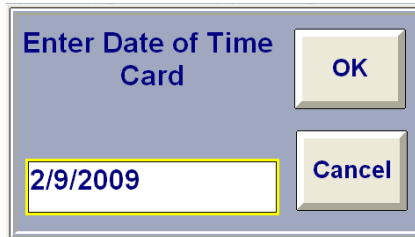Pressing a name will allow you to change the clock status.
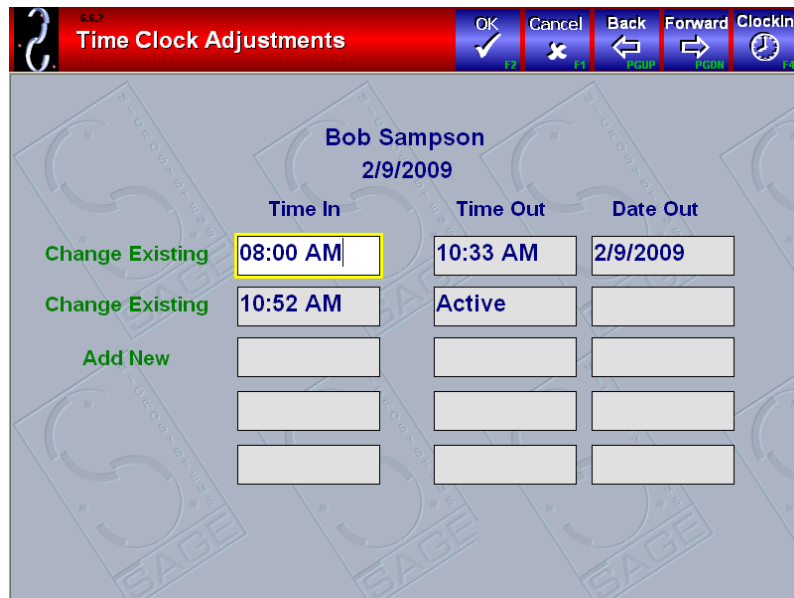
Time Clock Adjustments

Time Clock Adjustments allows you to modify, add, or delete time clock entries.

From the Main Menu, choose Employee Management, Time Clock Adjustments. You will be prompted with a list of your employees. Choose the appropriate employee.

You will be asked to enter the date of the time card you wish to modify.

You will be presented the Time Clock Adjustments screen.

Note that in this example, the first entry is an existing entry. You can modify either the In or Out times.

Note that the second entry in this example is an Active entry. You can modify the In time only.

On a blank line you can add an entry, but you need the In and Out times as well as the Date Out date. Thus, you can only add an entry for a time period when the employee already clocked out. If you are trying to add a new period for when the employee is still clocked in, first clock in the employee, and then come back to the Adjustments screen to modify the In time.

Employee Reporting

The following employee reports are available:

Employee Profile Lists all personal information about the employee, as well as pay rates, Quarter-to-Date and Year-to-Date Gross Earnings. You can print the report for all employees or for a single employee. Use this report whenever detailed personal employee information is needed, such as for insurance forms or W2 information.

Employee Time Sheet Lists for each employee the dates and times worked, total hours worked for each day, and the total hours worked in the time period. You can print the report for all employees or for a single employee. You can choose any date range. Print this report using the "One Employee Per Page" and "Print Signature Line" options, and review the hours worked with each individual employee before you write your paychecks. Have the employee sign the worksheet so that you know that the hours worked is correct in the system. This will help ensure that paychecks will be correct the first time.

Employee Earnings Lists each employee, Social Security number, Pay Rates for Regular and Overtime hours, and Regular and Overtime Hours Worked. You can print the report for all employees or for a single employee. You can choose any date range. It multiplies the hours worked and the appropriate pay rate to calculate total earnings for the pay period. Use this report to calculate payroll, but note that QuickTouch cannot calculate taxes or withholdings, you will need an accounting program such as QuickBooks, or an outside payroll company to do this.

Employee Sales Tracking When printing an invoice, the Recommendations screen allows you to assign four employees to that invoice, in the positions of Manager, Courtesy Technician, Upper Bay, and Lower Bay Technicians. This report will list for each employee, the position that he worked and what services were sold on invoices while he was in that position. You can choose any date range. Note that the services listed were not necessarily performed by the technician, just that the service was performed on the vehicle while he was in that position (a Lower Bay technician would not necessarily install an air filter). Use this report for calculating commissions or to compare up sells between your various employees. Note that only SERVICES are listed on this report, not parts, so your employees need to make sure that they are not using the "Parts" button on the blue invoicing screen when selling services for anything that needs to be listed here.

Employee Service Each Service can be configured to prompt for two employees who performed that service. These employees can be different than the four positions listed on the invoice. You can print the report for all employees or for a single employee. You can choose any date range. The report will list for each employee, which position was worked (Worker 1 or Worker 2) and which services were performed while under that position. For each service, it will also list the number performed, the dollar amount, the number performed per 8hr shift, and the average number performed per hour. Use this report to calculate commissions for specific services.

Time Clock Audit Records all Time Clock activity for the selected date range including any adjustments that were made.

Bi-Weekly Time Sheet Summary This report shows the time sheet data for shops that utilize a bi-weekly payroll schedule. The format of this report coincides with the Pay Period End Day that is selected in Week End Setup (see page 165).

Employee Productivity Displays the # of Cars, % of Cars, and the Ticket Average for each Position as well as a total Ticket Average by employee.

Employee Reactivation

The Employee Reactivation feature allows a previously deleted employee to be restored into the system. This function is useful for former employees that have returned to the business.

Note: When an employee is deleted from QuickTouch, it's actually still stored in the database for historical reporting purposes.

To reactivate an employee, go to:

4 – Employee Management

6 – Employee Reactivation

Select the employee to be reactivated, and then click OK.

Fleet Account Management

Increasing car counts is every operator's goal, and using fleet accounts is one way to do this.

A "Fleet Account" is generally a customer who owns multiple vehicles that require more frequent servicing, such as delivery services, taxis, local government vehicles, etc. In return for giving you their business, a fleet account will often try to negotiate a discount or ask to be billed monthly, rather than paying at the time of sale.

Of course, the operator needs to strike a balance between profits and car count. There's no point in increasing your car count if you're not increasing your profits. For a new operator, the first challenge after attracting fleet accounts is distinguishing between loyal, paying accounts and those requesting hefty discounts that don't pay their bill in a timely fashion.

QuickTouch allows you to configure any number of fleet accounts, and to easily assign vehicles to those accounts. You can specify which accounts receive a discount, and those eligible for extended credit. Accounts that are past due or exceeded their credit limit can be disabled. Accounting features allow you to track payments, view balances, and print invoices. As some accounts may require you to record certain information at the time of the sale, QuickTouch allows you to configure this required information, and to include special instructions for your technicians before they service a vehicle for particular fleets.

The Fleet Account Management menus present the following options:

1. Fleet Account Maintenance

2. Payments/Credits/Debits

3. Account Inquiry

4. Print Fleet Statements

5. Charge Interest

6. Fleet Reports

    1. Fleet Account Listing

    2. Fleet Account Detail

    3. Fleet Transaction Journal

    4. Aging Summary

7. Close Billing Cycle

Fleet Account Maintenance

Fleet Account Maintenance allows you to add or remove Fleet Accounts, and configure many options.

From the Main Menu, choose Fleet Account Management, Fleet Account Maintenance. You will be prompted with a list of your fleets. Choose the appropriate fleet.

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

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

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

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

Page 1

- **Fleet Name** Required.

- **Account #** Required. This needs to be unique for each fleet account. It can consist of letters or numbers.

- **Address, Zip Code, City, State** Not required, but you want to fill this in accurately for all accounts.

- **Contact** This is the "Attention:" field on the printed statements, if bills need to be sent to a specific person or department.

- **Phone One** Not required, but you want to fill this in for all accounts.

- **Phone Two, Fax, Modem, E-Mail** These fields are all optional.

Page 2

- **Fleet Type** Local or National. This allows you to easily identify the fleet as Local or National, but has no other effect in QuickTouch. The **% Surcharge** field currently has no functionality.

- **Ask For Reminder Period** Usually NO here, as fleet accounts are generally not sent reminder cards. When you select NO, you are asked which reminder period to default to. If you leave this as YES, it will ask for a reminder period during the sale.

- **Allow Fleet Charge / Credit Limit** This allows the fleet account to be extended credit up to the limit.

- **Charge Interest** Generally No. This would allow you to charge interest for past due accounts, usually 1.5% per month.

- **Statement Type** Open Items or Balance Forward. Open Items means that each payment received will be paid against an individual invoice or multiple invoices. This option allows you to easily find an invoice that was not paid. Balance Forward simply allows you to apply a payment to an open balance, and the balance will then be reduced. The advantage to this is that it is quicker, the disadvantage is that you cannot determine whether a particular invoice has been paid or not. See the Payments/Credits/Debits section to view examples of these screens. After setting the Statement Type, indicate the number of days the amount will come due. For Open Items, each invoice is payable by X number of days after the invoice date. For Balance Forward, a bill is sent at the end of the month, for which the entire amount is due by X number of days from the bill date.

Page 3

Exton Police Department

| Pricing Category | **Standard** | **A** | **B** | **C** | **Custom %** |

Discount Percent `10` (Applies to Service and Stocked Part Prices)

Taxable [**Yes**] [**No**]

Loyalty Rewards [**Yes**] [**No**]

Pop-Up Notes At [**Both**] [**Check-In**] [**Check-Out**] [**None**]

Notes

General Ledger Accounts — Sales [ ] Cash [ ] Receivables [ ] Freight [ ]

- **Pricing Category** Fleet accounts can be assigned to one of two pricing methods. Standard pricing will charge the fleet accounts the regular price for services. Category pricing allows four categories of fleet accounts, A, B, C and Custom %. The A, B, C categories work off of predefined dollar amounts or percentages that are setup in Service Maintenance. The Custom % option gives a straight discount across the board for any Service or Part that is sold to an account.

- **Taxable** Yes or No.

- **Loyalty Rewards** Specify whether the Loyalty Reward system should include services performed on vehicles that are attached to this fleet account.

- **Pop-Up Notes** You can configure a note to pop up at check-in, check-out, or both. Notes are useful to let the technicians know general information about the account vehicles, such as particular procedures to follow or services to perform, or can be used as "Warning" messages to alert the shop to only allow certain vehicles to charge to the account.

- **General Ledger Accounts** These fields are used for accounting interfaces, and can be left blank.

Pages 4-6

Pages 4-6 allow up to 24 "Vehicle Information" fields to be collected for the fleet vehicle at the time of service. The vehicle information fields will be printed on the Invoice.

NOTE THAT ONLY SIX LINES CAN BE PRINTED ON ANY SINGLE INVOICE. QuickTouch allows 24 fields to be configured because different fleets may have different requirements, but on any single invoice, only the first six enabled information fields will be printed. (A field is considered "Enabled" if any of the buttons are set to Yes). Thus, it is important to conserve lines for fleets that require a lot of information – in the example above, note that City, State, and Zip Code are configured to be on three different lines, but it would be just as easy to consolidate these into one "City, State, Zip" line and conserve two lines for other uses.

The vehicle information may be collected at check-in or check-out or both.

The information may also be "Required", meaning that the cashier cannot print an invoice without supplying the required information.

The information can also be remembered, or defaulted, from the last visit.

In the example above, the fleet account requires that the Company Name and the Driver Name be recorded at each service. Thus, we have the Pop-up On Check In and Pop-up On Check Out buttons set to Yes. These are also required values, and this is set to Yes. Now, the company name will always be the same for that vehicle, so this is Default From Last Visit, but there may be different drivers, so the Drivers Name field is not defaulted from last visit.

Collecting this information is important because many national fleet accounts and some local accounts may require information such as a Purchase Order or Authorization number before the vehicle is serviced. These types of information will be different for each visit by the vehicle. Many fleets will not pay the invoice if the required information is not printed directly on the invoice!

Payments/Debits/Credits

As fleet accounts receive services, they will accumulate an outstanding balance. After sending out your fleet statements, you will start to receive payments towards these balances.

"Payments" in QuickTouch are any receivables that pay down the outstanding balance. Note that QuickTouch will always assume that the payment is a check, and will look for that check to be in the cash drawer at the end of the day.

"Debits" will increase the outstanding balance for a fleet (they owe you more money). Debits are generally used for creating a starting balance, assessing a penalty, or recording a debt from a separate business unit.

From the Main Menu, choose Fleet Account Management, Payments/Credits/Debits. You will be prompted with a list of your fleets. Choose the appropriate fleet account.

The Payments/Credits/Debits screen will work slightly differently depending on whether a fleet accounts is Open Items or Balance Forward (page 2 of the Fleet Maintenance screen).

Important! Any transactions done under Payments/Credits/Debits cannot be undone, they can only be offset, and so the fleet account statements will reflect all activity done on these screens! If you are a new user to the system, please contact Sage Technical Support before attempting anything for the first time on these screens.

Open Items

Payment This will allow you to create a payment transaction for this fleet. Payments are assumed to be checks, and all payments will be listed as checks in the Day End Processing screens. Thus, every payment will affect the cash drawer totals for that day. A payment must be applied to an open invoice or credit, which will be listed on the bottom half of the screen.

Apply Credits If a credit has already been created but not applied (you will be warned when you enter the Payments/Credits/Debits screen), you can use this button to apply the credit.

Credit This will allow you to create a credit for an account. You will then need to go back into Payments/Credits/Debits and apply the credit to a particular invoice.

Debit This will allow you to create a debit for an account. It will appear in the bottom half of the screen along with any open invoices.

The Open Items view will list all outstanding invoices. When you receive a payment, the payment will apply towards one or several particular invoices. Type in the dollar amount of the check, and then mark the "Paid" button next to each invoice it applies to. Pressing OK will apply the payment to the selected invoices, and the outstanding balance will be updated.

Using the Open Items method also allows you to apply a discount to an individual invoice. First, add a payment and select the invoice and you are now able to press the "Discount" key for the remaining amount, to zero out the invoice balance. This is useful for certain national fleet accounts that deduct a percentage (10%) from the invoice amount and pay the rest.

If you create a debit under the Open Items method, it will appear as a separate line item along with the invoices.

If you create a credit under the Open Items method, you will not see it as a separate line item. However, when you go into the Payments/Credits/Debits screen you will see a notice "Unapplied Credits Exist", and you will now see the Apply Credits button listed. Press the Apply Credits button, select the credit (you will see each unapplied credit listed as a separate line item), and then select the invoices or debits to apply the credit to.

Caution! This is tricky, because a common mistake is to create a credit, but not apply the credit to an open invoice. When you create the credit, the balance is reduced, but the credit is not applied to an open invoice until you use Apply Credits. If this is not done, then the user then tries to create another credit and another and another….and now you have a bunch of unapplied credits, and when you finally apply them all the fleet will have a huge credit which must be corrected with a debit.

IT IS IMPORTANT THAT YOU FULLY UNDERSTAND CREDITS AND APPLYING CREDITS BEFORE YOU ATTEMPT THIS. Please contact Sage Technical Support if you have any questions at all about this feature. Any transactions done under Payments/Credits/Debits cannot be undone, they can only be offset, and so the fleet account statements will reflect all activity done on these screens.

Balance Forward

Payment This will allow you to create a payment transaction for this fleet. Payments are assumed to be checks, and all payments will be listed as checks in the Day End Processing screens. Thus, every payment will affect the cash drawer totals for that day. Payments will immediately apply to the open balance with the Balance Forward method.

Apply Credits This function is disabled if the fleet is using the Balance Forward method.

Credit This will allow you to create a credit for an account. Credits will immediately apply to the open balance with the Balance Forward method.

Debit This will allow you to create a debit for an account. Debits will immediately apply to the open balance with the Balance Forward method.

Balance Forward simply posts payments, credits, or debits against the open balance. If you need to view account activity, use the Account Inquiry feature.

Account Inquiry

Fleet Account Inquiry allows you to view all payment, credit, debit, or invoicing activity for a particular account for any date range.

From the Main Menu, choose Fleet Account Management, Account Inquiry. You will be prompted with a list of your fleets. Choose the appropriate fleet account.

The only options here are to indicate the date range. This will allow you to view all fleet account activity for that date range, as well as forward and ending balances.

Print Fleet Statements

Print Fleet Statements allows you to print all payment, credit, debit, or invoicing activity for all of your active fleet accounts.

From the Main Menu, choose Fleet Account Management, Print Fleet Statements.

The fleet statements will print in a format that conform to #9 Standard Invoice Double Window envelopes. This will allow you to simply fold the invoices and place them in the envelopes without having to write the mailing or return addresses.

Normally, you will print your fleet statements every month. The statement end dates will normally be on the last day of the previous month (in the following examples, we are using February 1 to February 28 as the billing period, with February 28 as the Statement End Date).

After you successfully print your statements, you will be asked if you want to "Close the Billing Cycle".

The Billing Cycle, or the Billing Period, refers to the date range of activity for your statements. After you print your invoices, you will close the billing period based on the last day of that month (in this example, February 28). Now, when you send out your invoices for the next billing period (March 1 – March 31), the system will know that the last billing period was ended on February 28 and only print activity after that date.

IMPORTANT! There is a functional difference between the Print Preview and Print options on this page! Normally, Print sends the document to the printer, and Print Preview displays the document on the screen, and you can print it from there. However, in this case, the Print option also allows you to close your billing cycle after the invoices print. Print Preview does not give you this option, you must close the billing cycle manually. It is important to understand these differences.

Print Fleet Statements

Start Fleet Name, End Fleet Name These fields allow you to choose the range of fleet accounts you wish to print. The accounts are sorted alphabetically by name, and these options automatically list your first and last fleet accounts – in other words, all

of them. Press the arrows to select a specific fleet if you wish to only print one, or a particular range of fleets.

Print Accounts with No Activity and 0 Balance Normally this will be NO, if a fleet account has no balance and no activity for the billing period, QuickTouch will not print an invoice.

Statement End Date This will default to the current date, but will normally be set to the last day of the previous month.

Print Preview This will display the invoices on the screen so you can review them before printing. You can then print them from the Print Preview screen. However, if you do this, YOU WILL NOT BE PROMPTED TO CLOSE THE BILLING CYCLE after the invoices print, you will have to do this manually through the Close Billing Period function.

Print This will print the invoices. After QuickTouch sends the invoices to the printer, you will be prompted "Are you sure you want to Close the Billing Cycle?" DO NOT SAY YES OR NO UNTIL THE INVOICES ARE DONE PRINTING. If all the invoices print successfully, you can say Yes and the billing cycle will be closed based on the Statement End Date.

"Close Billing Cycle"
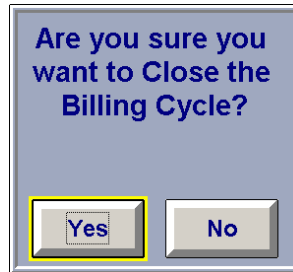
Example of a Fleet Statement.

Note that the "From" information is configured under the Center Information option of General Setup Options. To set this up, from the Main Menu, choose System Management, General Setup Options, Center Information.

Charge Interest

The Charge Interest feature allows you to charge interest on fleet accounts that are overdue.

We have implemented two different types of account practices in our accounts receivable system. The first being balance forward and second is pay by invoice. Both of these accounting practices are based on daily interest by invoice. All invoices are due within a predetermined time. This time is set within the accounts receivable customer setup.

Balance Forward

With the balance forward system flag set, the invoice is payable within "X" number of days from the date the statement was printed. An example of this would be as follows. In Accounts Receivable Customer setup you have the flag set to balance forward and that they have 10 days from the statement date to pay the invoice. A customer comes in the first day of January. The Customer receives some work and the invoice is worth $50.00. You print out the statements at the end of the month, which is January 30th. The invoice from the first would be due on the 10th of the February. This essentially gives them 40 days interest free. If they do not pay this invoice by the 10th, interest starts to incur from February 10th forward. So if I were to charge interest on the 20th of February and the invoice wasn't paid then this customer would incur 10 days of interest. If the customer were to come in on January 29th and received some work, his bill would still become payable on February 10th. Making his invoice due in only 11 days.

Pay By Invoice

A Pay by invoice system is similar in nature to the balance forward system. The only main difference is when the invoice becomes due. Unlike the balance forward system which all invoices are due on the same day, the pay by invoice system gives a set or predetermined number of interest free days from the invoice date. In Accounts Receivable Customer setup you have the flag set to pay by invoice as well as the number of days they have to pay this bill before it starts to incur interest. Here is an example of pay by invoice. A customer comes in the fifth day of January. The Customer receives some work and the invoice is worth $50.00. You have given the customer net 10 days to pay the invoice. That makes this invoice due January 15th. It does not matter if statements were printed or not. Each day past January 15th gets interest charged until it is paid.

Charge Interest Screen

Simply enter the Interest Date, which typically is the end of the month of which the bills have been sent (i.e., the February bills were sent February 1, so any payments not received by February 28 will be charged interest). Click Process to calculate the interest.

IMPORTANT! This cannot be undone! The interest charges will show as individual debits under each fleet account. The only way to undo the interest charge is to create a credit for that amount and then apply it to the interest charge.

Fleet Reports

The following Fleet Reports are available:

1. Fleet Account Listing
2. Fleet Account Detail
3. Fleet Transaction Journal
4. Aging Summary

Fleet Account Listing Report

This report will list all fleet accounts and some basic information, including telephone number, contact name, pricing category, the number of vehicles assigned to that fleet account, and whether charges are allowed.

Fleet Account Detail Report

This report will list the vehicles that are assigned to each fleet account.

Fleet Transaction Journal

This report shows all fleet transactions for each fleet account for a given date range.

Fleet Aging Summary

This report lists all fleet accounts with a summary of outstanding balances, and the number of days past due. This makes it easy to distinguish between slightly overdue accounts and long overdue accounts.

Close Billing Cycle

The Billing Cycle, or the Billing Period, refers to the date range of activity for your statements. After you print your invoices, you will close the billing period based on the last day of that month (for example, February 28). Now, when you send out your invoices for the next billing period (March 1 – March 31), the system will know that the last billing period was ended on February 28 and only print activity after that date.

When you print your fleet statements, you will be prompted to close your billing cycle. If you use Print Preview to view your statements before printing, you will not be prompted to close your billing cycle, and thus will need to use this screen.

Simply enter the date of the billing cycle you wish to close.

Please note that you cannot undo this function.
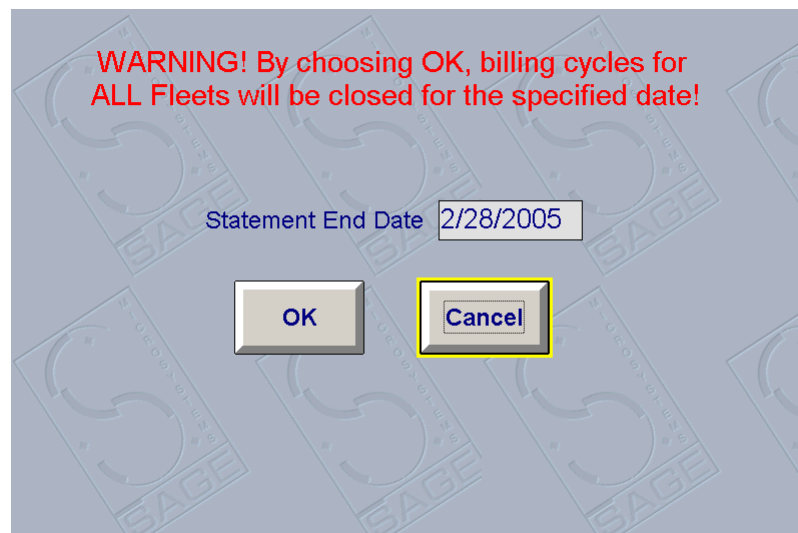
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Customer Management

Customer Management provides various functions for maintaining and accessing your customer database. These functions include the following:

1. Customer Maintenance

2. Vehicle Maintenance

3. Reminder Cards

   1. First Reminder Cards

   2. Second Reminder Cards

   3. Third Reminder Cards

   4. Thank You Cards

4. Vehicle History

5. Sage Service Manual

6. Delete City Function

7. More Customer Management

   1. History Merge

   2. MailMark Export

Customer Maintenance

Customer Maintenance allows you to search your customer database for a particular customer based on various criteria. This function can also be used for updating contact information, viewing history, changing a reminder card date, changing promotion credits, or deleting the customer entirely.

From the Main Menu, choose Customer Management, Customer Maintenance.

Enter your search criteria and press Search.

If more than one customer fitting the criteria is found, you will be prompted with a list of customers. Choose the appropriate customer. If only one customer was found, the Customer Maintenance screen will be displayed.

Title You can choose an appropriate title but this has no functionality.

Name, Address, City, State, Zip These fields will be printed on the reminder card, and are also required fields on the Bay Screen when creating an invoice for a customer. Thus, this information should always be filled in.

If a customer is unwilling to provide address information, or if this information is unavailable, you should populate these fields with a "1" in each. This will satisfy the requirements for creating an invoice, and will also allow for easy sorting in case any "junk" addresses are printed on reminder cards, thus saving postage.

Phone, Fax, Email These fields are optional.

Notes This field simply provides an area for customer notes. It appears on the "Extended Customer Information" screen when you are checking in a customer, and thus is not as useful as the two Customer Comments fields below this.

Reminder Period When an invoice is generated for a customer from the Bay Screen, that is when the reminder period is selected (90 days, etc). If you wish to change the reminder period AFTER the invoice had been generated, press the arrow and select the appropriate reminder period. The next reminder date will be updated immediately.

Comments These comments fields that will appear on the Customer Information screen when checking in a vehicle.

Vehicle Button This will display the Vehicle Information screen, as described in the next section.

LR Maint This button allows you to reset the Visit Counter for the "Buy X Get 1 Free" promotion.

Sticker Button This allows you to set the customer's custom sticker month and mileage recommendations.

Vehicle Maintenance

This will display the Vehicle Information screen, from which you can view History, or assign the vehicle to a Fleet Account. The Vehicle Notes field has no functionality beyond this screen.

Note the "Check Chart Active" message in blue next to the vehicle year. This indicates that the Year, Make, Model, and Engine choices were selected correctly from the menus. Thus, Chek-Chart data for this vehicle will be available. Otherwise, it will say "Chek-Chart Not Active".

You can also assign the vehicle to a fleet account at this time by pressing the arrow next to the Fleet Name field.

Reminder Cards

The Reminder Cards function allows you to print your reminder cards.

In short, using reminder cards is a strategy to remind your current customers of the service that they received at your location, and that it is time for their next scheduled service.

The best practices are to print your reminder cards on a very regular basis, such as every week – you want to print your cards often enough so that the volume of returning customers are spread evenly throughout the month.

For larger volumes of reminders (200+ per mailing), there are various discount programs available from the United States Postal Service (USPS). These generally provide a cheaper postage rate, in return for an annual fee and having the permit pre-printed on the post card. Other requirements, such as presorting by zip code, may also apply. The USPS can best provide the information as to which program is best for your business.

The reminder date for a customer is actually generated at the time of the last sale. You will either be prompted with a reminder period, or it will default to a fixed reminder period (say, 90 days).

If you have never printed a reminder card, and are considering using this feature, please contact Sage Support for assistance in purchasing the correct size and format of reminder cards. QuickTouch supports many different types and formats of reminder cards, but certain types for certain printers may not be supported. Before ordering a large batch of cards, make sure Sage says that QuickTouch will support them.

From the Main Menu, go to Customer Management, Reminder Cards.

First, Second, Third Reminder Cards By default first reminder cards will go out 90 days after the service was performed. This can be changed to either ask for a date range or set to default by going to System Management, General Setup, Reminder Card Setup. Second and Third reminders time frames can't be changed and are sent 120 and 150 days after service was performed and will only print if the customer has not returned.

Selection Date This is the RETURN date of the customers. So, in this example, it's nearing the end of August. We want to print and mail the reminder cards for the first two weeks of September. This is the date we typed in here. Note that any customer who has a return date prior to this date, and who has not received a reminder card, will be printed.

Max. Num Reminder Cards This prevents the computer from churning out too many cards in one batch. On older systems with pin printers, if too many cards printed at once the printer would go out of alignment. This is not an issue with Laser printers.

Card Type This is set from the System Management, General Setup Options, Reminder Cards section – please call Sage Support for assistance in setting the card type.

Change Message This will allow you to view or change the message that will print on the cards. Click OK when done.
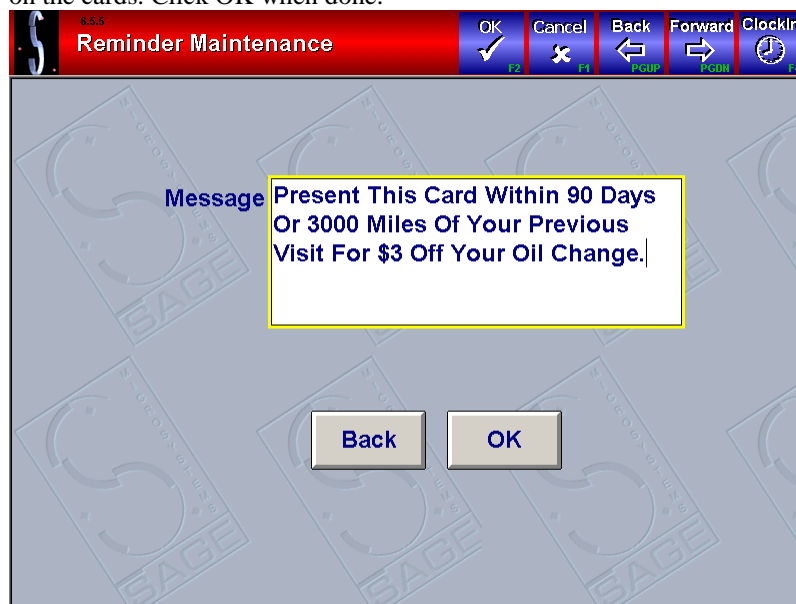

Zip Code Separator This will sort the cards by zip code and print a blank sheet between them. This is useful to separate out any "junk" zip code customers who are from out of town. Zip codes of "1" will not print in either case.

Print Mail Stamp Choose Yes here if you have a "Permit Imprint Advance Deposit Account" assigned from the USPS, and fill in the appropriate fields.

Test Align Perform a Test Align to make sure the cards are inserted and lined up correctly. This is especially important for pin-fed reminder cards. Use this as many times as necessary to ensure that the cards will print correctly the first time.

Print When you're ready to print your cards, press Print. QuickTouch will lead you through a series of steps to make sure that all of your cards print correctly, and if they didn't, which ones to reprint.
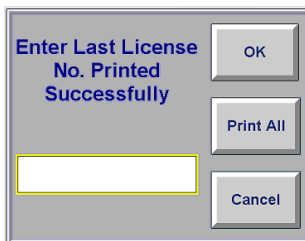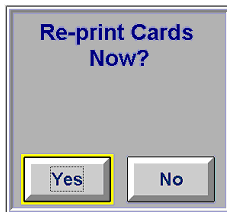
After clicking Print, you will be prompted with how many cards will be printed.
Click Yes to print the cards.

**Printing 1 of 12
cards. Continue?**

Yes   No
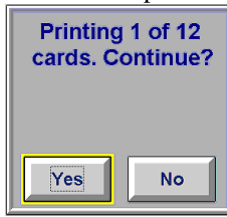
The cards will print. **WAIT UNTIL THE PRINTING COMPLETES.** When
complete, you will be asked if the cards all printed successfully. If they did, press
Yes. **Please Note**: Once you indicate that they printed successfully, you will be
unable to reprint them.

**Did All Cards Print
Successfully?**

Yes   No

If the cards jammed or did not finish, say NO. You will be led through a series of
screens to print the remaining cards. Say YES to reprint, press Continue, and then
enter which license plate last printed successfully. The rest of the cards will print,
and you will be asked if it completed successfully this time. Continue until you are
finished.

**Re-print Cards
Now?**

Yes   No

**WARNING
Cards Have Not Yet
Finished From**

CONTINUE   New Set   Cancel

**Enter Last License
No. Printed
Successfully**

OK

Print All

Cancel

Thank You Cards Thank You Cards are sent to customers 45 days after their visit.
This number cannot be changed, however you can change the date of the computer to

print the cards sooner. Please contact Sage Technical Support if you are interested in doing this.

Vehicle History

This will display the Vehicle History screen, from which you can view the complete customer history, parts and services, statistics, and reprint invoices. You can search by License Plate or Name.

Note that you can also access vehicle history through the Customer Maintenance and Bay Screen areas. These other areas will provide more search criteria to widen or narrow your searches.

The Vehicle History screen will list all service history. Note that for each visit, all Services and Service Comments are listed.

Parts Press the Parts button to view parts details under each service. This will indicate information such as the quantity used, as well as any parts that were sold outside of a service.

7	04/26/2004		65,432	49.12	Full Service
					4- SAGE10W30
	Recommend Differential Service				1- OF1
					Wiper Blades
					1- 11-18
					Air Filter
					1- VA5
					P C V Valve
					1- PCV1
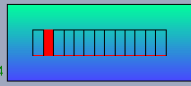
Print This will print the entire service history for the vehicle.

Stats This will display service and visit statistics for the vehicle.

Reprint Invoice You can reprint a particular invoice by pressing on the Invoice # button for the appropriate invoice. Pressing the button will display more detailed information on the screen, from which you can reprint the entire invoice.

Note: Converted invoices from the DOS or other systems cannot be reprinted. You are only able to reprint converted service history.

Sage Service Manual

This will display the Sage Service Manual, which lists all Chek-Chart lubrication guides, and chassis and engine graphics if available (requires subscription).

You will be required to select the proper year, make, model, and engine from the lists.

Print All of the currently selected pages will print. In our example above, "Full Report" has been selected and there are 11 pages to print, indicated by the bottom right hand corner of the screen.

Key A key to all of the codes used in the SSM will be printed.

Full Report This will display the full Service Manual.

Parts, Chassis/Engine, Recommendations, Cautions, Lubricants, Capacities, Oil Reset, Tires/Torques, and Procedures When selecting these buttons, only the portion of SSM corresponding to the selection will be displayed. For example, if you select the "Oil Reset" button, only the oil reset procedures will be displayed.

Note: If you select "Oil Reset" and select **Print,** only the oil reset procedures will print.

Delete City Function

QuickTouch allows you to assign more than one city to a particular zip code. QuickTouch already includes a complete listing of zip codes in the USA. In addition, you can add zip codes into the system from other areas of QuickTouch.

Sometimes, however, a zip code will be entered incorrectly. Use this function to delete an incorrect City/State/Zip from the system.

Simply type in the zip code effected and press the arrow.

If more than one city for the zip code is found, you will be presented a list. You can choose which city to delete.

Once deleted, the zip code can be re-entered through any customer maintenance screen.

History Merge

Maintaining your customer and history databases is important in order to correctly recommend services and ensure that loyalty rewards are assigned correctly.

Occasionally, a mistake will be made entering a customer into QuickTouch. This may happen when a customer receives a new license plate, or if a technician types the license plate into QuickTouch incorrectly, and thinks it's a new customer.

To fix either of these occurrences, you can do a History Merge.

First, you will need to decide which is the GOOD license plate, and which is the BAD one. You will want to merge FROM the bad INTO the good.

This process will move all history and loyalty information into the "good" license, and remove it completely from the "bad" license.

You have the option here to delete the "bad" license, which you will usually want to do. You also have the option to merge the loyalty reward information, this will also usually be done.

Press Merge History when you're ready and the merge and deletion of the bad license will occur immediately.

In this example, a technician checked a customer in with the incorrect license plate, ABC132, and you want to delete this and merge the visit into the correct license plate, ABC123.

LR Only Use the LR Only button if you want to keep both vehicles in the system, but want to ONLY merge the loyalty rewards. An example of when you would use this is if a family owns several cars but wants to merge the loyalty rewards all into one car (say, a kid taking a car to college).

MailMark Export

MailMark is a third party vendor specializing in customer mailings.

MailMark Export Date Range Selection

Start Date 06/16/04

End Date 06/16/04

Export

Export This will create a MailMark.txt text document in the C:\MailMark folder.

To configure the MailMark interface in QuickTouch:

- o Go into each service that MailMark will use. In Service Maintenance, go forward to page 5 and look for the MailMark option. Select the appropriate code. (i.e. Full Service = FS)

- o Go into General Setup, Export Setup and enter the MailMark information that MailMark provides.

- o Create a Security Group called MailMark that has security access to the export function only and an employee named MailMark, code 99, password 9999999, and assign this employee to the MailMark security group.

Marketing Management

Marketing Management Reports

The Marketing Management reports in Quick Touch allow you to pinpoint sales and marketing trends in your store. All reports will indicate both the number and percentage of each listed item, and can be run for any date range. These reports include the following:

1. Zip Code Analysis
2. Coupon Analysis
3. Advertising Type Analysis
4. Discount Analysis
5. Day of Week Report
6. First Visit Vs. Repeat Visit Analysis
7. Time of Day Analysis
8. Time of Day by Weekday

Coupons, Discounts, and Advertising Types can be configured under System Management, Cash Register Maintenance.

Zip Code Analysis Lists all visiting customer zip codes for the date range indicated.

Coupon Analysis Lists all coupons used by customers for the date range indicated.

Advertising Type Analysis Advertising Types are the "How did you hear about us?" entries done when checking in a new customer. This report lists all advertising type answers for all new customers for the date range indicated.

Discount Analysis Lists all discounts used by customers for the date range indicated.

Day of Week Report Lists the number and percentages of customers for each day of the week for the date range indicated. This report will be more useful run over a several week period with a Monday starting date and a Sunday end date.

First Visit Vs. Repeat Visit Analysis For all customer visits in the date range, this will compare the numbers and percentages of new customers and repeat customers.

Time of Day Analysis Lists the number and percentages of customers for each hour of the day for the date range indicated. This report will be more useful run over a several week period with a Monday starting date and a Sunday end date.

Time of Day by Weekday The report shows a comparison of car counts for each weekday against the same day in previous weeks for the specified date range. This report is useful for planning employee schedules and controlling labor costs.

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 the following sections:

1. Cash Register Maintenance

2. General Setup Options

3. System Utilities

4. Business Group Setup

5. Display Export Status

Cash Register Maintenance

Cash Register Maintenance contains the following areas:

1. Coupon Maintenance

2. Discount Maintenance

3. Advertising Maintenance

4. Comment Maintenance

5. Reminder Maintenance

Coupon Maintenance

In QuickTouch, "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.

Unfortunately, Sage cannot offer tax or accounting advice. You must contact an accountant or your state for instructions on how to properly collect sales taxes for your locality and business type. Sage can only assist in configuring QuickTouch to best match your business practices.

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.

Also note 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.

If you wish 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.

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

Page 1

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

Coupon Description This is the 'friendly' name that will print out on the customer's invoice.

Display Sort order Indicate which position you want the coupon to appear.

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. In order 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 or not a coupon has a beginning and ending (expiration) date. The coupon cannot be used outside of these dates if enabled.

Page 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	$23.39
Tax 6%	$1.40
Amount Due	$25.39

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

Unfortunately, Sage cannot offer tax or accounting advice. You must contact an accountant or your state for instructions on how to properly collect sales taxes for your locality and business type. Sage can only assist in configuring QuickTouch to best match your business practices.

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.

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

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

Advertising Maintenance

Advertising Types in QuickTouch allows you to track "How did you hear about us?" statistics for all of 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 to <the place across the street> 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.

From the Main Menu, choose System Management, Cash Register Maintenance, Advertising Maintenance. 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.

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.

Advertising Name	Bloom Picayune Coupon
Display Sort Order	1
Date Start	6/12/04
Date End	6/19/04
Company	Bloom Picayune
Contact	John Smith
Phone	654-321-9876
Fax	654-321-8877

Advertising Name Type the description of the method.

Sort Order Indicate in which position you want the advertising type to appear.

Start Date, End Date If applicable, enter the dates that the advertisement will run. These dates will print on the Advertising Type Analysis report. Unfortunately, these dates will not prevent the advertising type from being selected after the end date, you will need to delete the advertising type to prevent a cashier from selecting it. The report, however, will always show any advertising type that was selected in the past, even if deleted.

Company, Contact, Phone, Fax Optional contact information.

Comment Maintenance

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

- Work Order Comments
- Customer Comments
- Service (Invoice) Comments

Work Order Comments These comments are available when checking in a customer, and will print out on the Work Order. Work Order comments are best used to indicate special instructions or information that the lube technician needs to know before working on the vehicle. Some examples of Work Order comments are:

- Special Tire Pressure
- Check Lights
- No Vacuum

Customer Comments These comments do not print out anywhere, but remain in the system and will display on the customer information page on check-in and check-out. Customer comments are anything you want to remember about the customer, but not necessarily vehicle information. Some examples of Customer comments are:

- Always Replace Air Filter

- No Personal Checks Accepted

- Senior Citizen Discount

Service (Invoice) Comments These comments will be the most utilized. Service Comments are sometimes called Invoice Comments because they are printed on the invoice. They are also stored and displayed in customer history. Service comments are used either to indicate any special notes or recommendations about the vehicle, or for announcements. Some examples are:

- Oil Level 1 Qt Low On Arrival

- Customer Requested Tires at 38lbs

- Rear Differential Service Recommended

- Summer Special – Transmission Flush $59.99.

Comment Description Type in the comment description here.

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

From the Main Menu, choose System Management, Cash Register Maintenance, Comment Maintenance. Choose the appropriate comment area. You will be prompted with a list of the comments. Press on comment to edit that comment.

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

Also 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.

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

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

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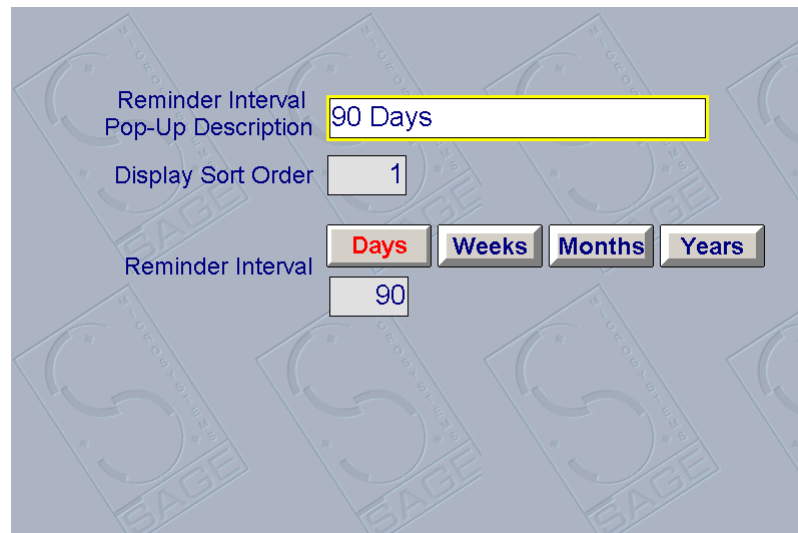
Fleet accounts, which generally do not need reminder cards, can be configured to never send a reminder, or can be defaulted to a reminder period. This is done under Fleet Account Maintenance.

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

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

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).

From the Main Menu, choose System Management, Cash Register Maintenance, Reminder Maintenance. 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.

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.

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 Options allows you to configure QuickTouch to best match the business needs at your location. General Setup Options consist of the following areas:

1. Center Information
2. Business Information
3. Center Defaults
4. Invoice Setup
5. Work Order/SSM Setup
6. Sticker Setup
7. Inventory Setup
8. Day End Setup
9. Week End Setup
10. Month End Setup
11. Year End Setup
12. Reminder Card Setup
13. Tax Setup
14. Security Setup
15. Pay Type Setup
16. Cash Drawer Setup
17. Backup Setup
18. Export Setup
19. Sage Setup
20. G/L Export Setup
21. Owner Setup
22. Timer Setup
23. Email Setup
24. Estimate Setup

Center Information

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

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 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.

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

Business Name	Sage Quick Lube
Address	18 N. Village Ave
Zipcode	19341	City	EXTON	St	PA
Business Contact	Bob Sampson
Phone one	800-724-7400	Phone two	
Fax	610-524-3234	Modem	

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

Page 2 of 4

Franchise Number	12345
Franchise Name	Sage Quicklube
Address	Corp Address
Zip	19341	City	EXTON	State	PA
Fee #1	Franchise Fee	6.00	%
Fee #2	1/2 Percent Fee	0.50	%
Fee #3		0.00	%

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).

Page 3

Box 3 Header
Line #2
Box 4 Header
Line #2
Line #4
Line #6
Line #8

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. You can indicate additional lines for these boxes.

Page 4

Line 1
Line 2
Line 3
Line 4
Line 5
Line 6

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

Default License Enter the state code to default on the Check-in screen.

Number Of Work slips Used in conjunction with the Work Order Type (Work slip) setting in Service Maintenance. This would normally be used for a check-in station at a car wash entrance. Normally this is zero.

Default Country Choices are USA, Canada, Mexico, Brazil, and Argentina. This sets the locale settings, so QuickTouch displays date and money amounts in the 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 With this option is enabled, during cash-out the names of the employees who are servicing the vehicle will need to be selected with each transaction.

Require Employee Selection from Popup List This option will force the 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 This would require that a VIN number be entered for each vehicle 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.

Page 2

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

Default Labor On Fly Tax to 'Yes'	**Yes** **No**
Default Parts On Fly Tax to 'Yes'	**Yes** **No**
Labor Rate	**50.00**
Number of Work Hours per Day	**32.00**
Estimated Overhead per Day	**15.00**
Estimated Labor per Day	**20.00**
Base Ticket Average	**32.99**

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

Invoice Type This will normally be configured by the Sage Service Technician when your system is installed. The choices are complex, so although I'll provide brief descriptions, you should call Sage Support if you have particular needs. These options all depend on location, printer type, and invoice layout. A few of the choices include:

Invoice Type	Printer	Invoice Layout
Preprinted Laser	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.
Sage CA Service Invoice BAR	Laser	A Preprinted invoice type that is configured for California BAR compliance.
Graphics Color	Color Laser	Identical to the Graphic invoice above, with the ability to print in any color.

Center Name On Invoice This will print the name of the lube center on the invoice.

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 This allows you to display all parts associated with a service. Otherwise, only the service and total price will be listed.

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 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 the 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.

Print Claim Check With Receipt Used in car wash formats.

Page 2

Note: This is Page 2 of the Graphics invoice type. Other invoice formats may not have a second page, or may have different options displayed.

Print Technician Codes For Services Performed If enabled, this feature 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 This will prompt the cashier for a Work order number when the invoice is created. This is used for locations that have a preprinted, numbered Work order rather than the QuickTouch Work order.

Default Work order Number to Invoice Number This feature is only activated if the 'Prompt for Work order Number' feature (above) 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 This allows you to print the A, B and C fleet discounts on the invoice. "Total Only" will print a line with the sum of all the discounts the fleet account received on the invoice. The "Per Service" option will print the discount the fleet account receives under each service. "Don't Show" will not show any of 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

Note: This is Page 3 of the Graphics invoice type. Other invoice formats may not have a third page, or may have different options displayed.

Print RTF File on Back of Invoice (Requires Duplex Printer) QuickTouch has the ability to duplex (print on both sides) customer invoices. An automatic duplex printer is required to utilize this feature. This feature can be used for printing warranty or disclaimer information on the back of the invoice eliminating the need for preprinted forms.

RTF File In order for QuickTouch to print the warranty/disclaimer, the document must be saved in an .rtf (Rich Text Format) file format. This can be done from any standard word processing program and is the default file format for WordPad, which is built into Windows. Once the file is created, it must be saved into the QuickTouch data directory located at c:\Program Files\Quicktouch\data. Once the file is saved into this location, it will appear in the RTF file box.

Graphic File This feature allows a company logo to be printed in the top left corner of the Graphics/Graphics Color invoice This screen is where the logo image can be selected. Supported image file types include .bmp, .jpg, .gif, and .ico. Similar to the RTF file mentioned above, 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.

Compress Graphic File The Compress Graphic File feature allows a larger logo file to be automatically resized in order 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: The text on this line **will** print at the bottom of invoices for non-fleet customers.

Fleet Invoice Signature Line: The text on this line **will** print at the bottom of invoices for fleets.

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.

Work Order Type This will normally be configured by a Sage Service Technician when the system is installed. The choices are complex, so although I'll provide brief descriptions, you should call Sage Support if you have particular needs. These options all depend on location, printer type, and invoice layout. A couple of the choices include:

Work Order Type	Printer	Work Order Layout
Sage CA Estimate BAR	Laser	This work order is compliant with the California BAR and has the ability to be revised and signed by the customer
Sage XP Laser	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 actually 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

Note: This is Page 2 of the Sage CA Estimate Bar work order. Other Work order formats may not have a second page, or may have different options displayed.

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

Note: This is Page 3 of the Sage CA Estimate Bar Work order. Other Work order formats may not have this as their second page, or may have different options displayed.

This page allows you to choose what prints out automatically on the SSM after checking in a customer on the bay screen. Any item here that is red is selected to print. The Blue Items will not print out automatically after checking a car into the bay screen.

Sticker Setup

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

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

Default Sticker Mileage Interval This will generally be 3000 – this interval will be added to the customers' current mileage in order 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 The "Yes" option is only used when you need to print a static sticker with the current date and mileage of the vehicle. The "No" option will add another option to the screen called "Allow Sticker Date/Mileage Overrides". See Figure and explanation below for further detail.

Page 2 with "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 with Allow Sticker Date/Mileage Overrides

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.

Skip prompt to save Vendor in Inventory when changed in Restocking	**Yes**	**No**
Warn on Low Inventory	**Yes**	**No**
Warn on Negative Inventory	**Yes**	**No**
Costing Method	**FIFO** **LIFO**	**Avg** **Last**
Number of Decimal Places to use in Inventory Cost (2 to 4)	3	
Allow Inventory Adjustments while other Computers are logged into QuickTouch	**Yes**	**No**
Allow Inventory to be Added to Purchase Order	**Yes**	**No**
Allow Inventory Cost to be changed on Purchase Order	**Yes**	**No**
Allow Quantity to Order to be changed while creating a Purchase Order	**Yes**	**No**

Skip Prompt To Save Vendor… When restocking your inventory items, you are able to 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.

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.

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 or not 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.

Descriptions of these reports can be found under the Reprint Sales Reports, Inventory & Service Management, Employee Management and Marketing Management sections of this manual.

Page 1

Print the following reports after day end: Page 1 of 2

Day End Journal	Yes	No
Sales Journal	Yes	No
Daily Sales Report	Yes	No
Daily Activity Reports	Yes	No
Exception Report	Yes	No
Stock Sales Report	Yes	No
Employee Time Report	Yes	No
First Vs. Repeat Report	Yes	No
Vital Statistics Report	Yes	No

Page 2

Print the following reports after day end: Page 2 of 2

Till Report	Yes	No
Daily Sales Summary	Yes	No
Daily Data Backup	Yes	No

Week End Setup

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

Descriptions of these reports can be found under the Reprint Sales Reports, Inventory & Service Management and Employee Management sections of this manual.

Note that you can indicate the Week End Closing Day and Pay Period End Day. Week End Closing Day will affect the "Week To Date" totals on sales reports. Pay Period End Day will affect the Employee Earnings Report.

Month End Setup

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

The report descriptions are under the Reprint Sales Reports and Inventory & Service Management sections of this manual.

Year End Setup

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

The report descriptions are under the Reprint Sales Reports and Inventory & Service Management sections of this manual.

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.

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 had a tendency 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.

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 actually 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.

Protect Cash Drawer and Bay Deletes	**Yes**	**No**

This will force Code/Password prompt for Day End, Undo Day End, Void, Refund, Pay In, Pay Out, Open Cash Drawer, Cash Drawer Base Amount, Restore Invoice, Restore Purchase Order. And to override invalid data on Inventory Transfers. This will also prompt for Bay Deletes and allow or deny access based on the setting in the Security Group for that user.

Limit Fleet Credit Limits :	**Yes**	**No**

Prompt for Code and Password when Fleets are over credit limit and allow or deny access based on the setting in the Security Group for that user.

Prompt for Code/Password :	**Before Checkout :**	**Yes**	**No**
	Before Clock In and Clock Out :	**Yes**	**No**

Prompt for Inventory Adjustments :	**Yes**	**No**

Prompt for Code and Password for Inventory Adjustments and allow or deny access based on the setting in the Security Group for that user.

Use Security Hierarchy in Security Groups	**Yes**	**No**

If enabled, Users cannot view or modify employees or security groups that are in a Security Group with a lower security level than they are. Security Levels are set in Security Group Maintenance.

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.

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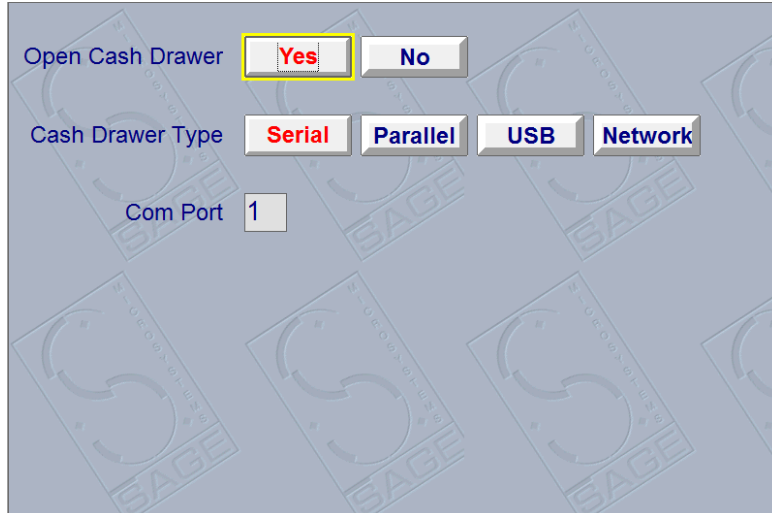
Optional: Fleet Name Selecting a particular fleet account for this payment type will automatically charge the invoice to that fleet. Leaving this blank will allow the cashier to indicate the fleet account at the time of sale.

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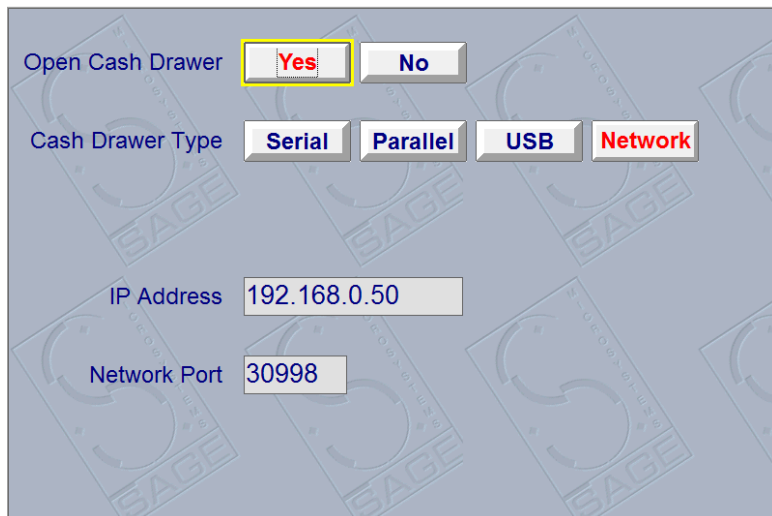
Open Cash Drawer YES to have the drawer open automatically based on the pay type. NO if there is no functioning cash drawer.

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.
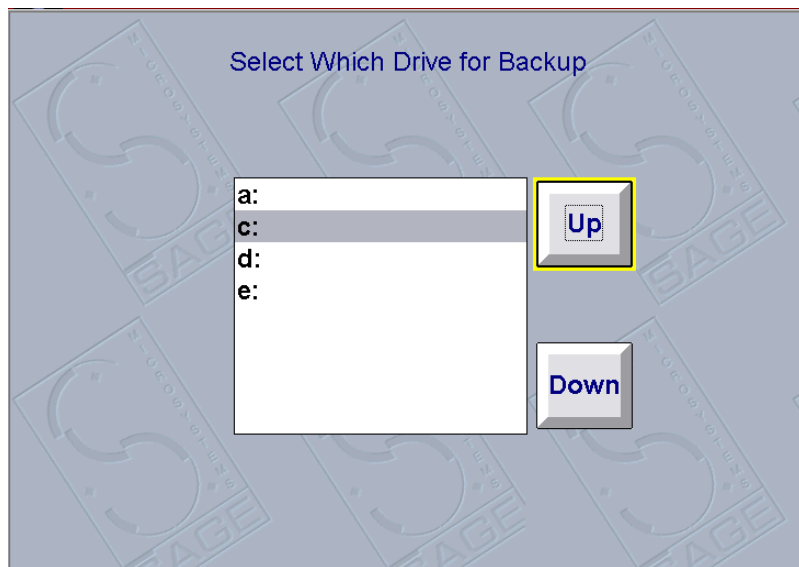
Export Setup

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.

QuickBooks/CarFax

Sage Setup

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

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.

Owner Setup

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

Page 1

			Page 1 of 7
Report Output Device Type	OKI	**Laser**	
Report Printing Style	**Fast**	Quality	
Bay Screen Style	**Lube**	Lube 2	
Rows on Bay Screen	**8**	9	10
Franchise	**Yes**	No	
Auto-Fill Service	**Yes**	No	
Skip Comments and Checklist Screens Allowed	**Yes**	No	
Warning message for returning non Motor Vehicles	**Yes**	No	
Enable extended Invoice screen editing (Quicktouch)	Yes	**No**	
Enable extended Invoice screen editing (Epicor)	Yes	**No**	

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. The "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.

Lube Style Bay Screen

License Plate	OH	-			Quick Sale
Name Search				9/7/2004 10:39AM	

Invoice	Service History	Customer Information	Manufacturer Specifications	Auxiliary
	OH-TEST	John Smith	2004 Acura 3.2tl	4 min

Lube2 Style Bay Screen

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 also enables three more configuration screens under Business Information that pertain to the Co-Op report. This is only necessary for franchise locations.

AutoFill Service. Enabling this option will allow QuickTouch to automatically fill in parts and quantity information when creating the invoice, based on what was indicated when the Work Order was created. The advantage to this feature is that it speeds up the Invoice process for most customers; the disadvantage is that for any invoice that needs a change (i.e., a customer requested house oil at check-in but was later up-sold to a high mileage oil), the AutoFill must first complete, and 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 to this 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. If this is the case, 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 is able to 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.

Page 2

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 you select a car for check-out, the services selected at check-in will automatically come up as services performed when you select the red car at invoicing. The advantage to this is 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.

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 similar to 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 pop-up 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.

Page 3

Hide Expired Coupons/Discounts During Checkout	Yes	No
Scan Coupons/Discounts	Yes	No
Scan Inventory	Yes	No
Allow $0.00 invoices	Yes	No
Show Service Maintenance Schedule During Check In	Yes	No
Show Invoice Total on Auxiliary Button for Invoices Ready For Cash Out	Yes	No
Allow change to Bank Deposit	Yes	No

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 If enabled, item look-ups will be searched by Stock Number or scanned barcode. Note: The product UPC 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 This feature will display the final invoice total for the corresponding invoice once the vehicle processing has been completed.

Allow Change To Bank Deposit Normally this will be NO. Most stores start the day with a fixed cash drawer amount, say $150. Thus, 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 fixed 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.

Page 4

Allow SMS to Search Shared History | Yes | No
Allow SMS to Search Converted/Archived History | Yes | No
Use Shared History File for Local Data | Yes | No
For Data Prior To This Date: |
Show Which Positions on Daily Stats | Manager | Upper Bay | Courtesy | Lower Bay
Use CARFAX to Validate Vehicle Info | Yes | No
Sort Parked Vehicles on Bay Screen | Normal | Bottom
Print a Receipt (not Invoice) for Each Applicable Service | Yes | No

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 amount of regular invoices (page 1 of Invoice setup), plus 3 receipts.

Page 5

		Page 5 of 7
Include Security For Parking Vehicles	**Yes**	**No**
Hide Parts Price On Invoice For Actual Parts Services	**Yes**	**No**
Show Taxable/Nontaxable Totals on Invoices	**Yes**	**No**
Show VIN on Invoices	**Yes**	**No**
Show Miles Since Last Visit on Invoices	**Yes**	**No**
Use Loyalty Rewards Program	**Yes**	**No**
Allow Emailing Invoices	**Yes**	**No**
Email Address Validation	**Yes**	**No**
Signature Capture	**Yes**	**No**

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 customers 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.

Page 6

<table>
<tr><td></td><td colspan="3" align="right">Page 6 of 7</td></tr>
<tr><td>Skip Workorder Screen During Check-In</td><td>Yes</td><td></td><td>No</td></tr>
<tr><td>Require Customer Info</td><td>Yes</td><td></td><td>No</td></tr>
<tr><td>Allow Customer Info To Be Skipped During Check-In</td><td>Yes</td><td></td><td>No</td></tr>
<tr><td>Require Email Address</td><td>Yes</td><td></td><td>No</td></tr>
<tr><td>Display/Require Customers Gender</td><td>Yes</td><td></td><td>No</td></tr>
<tr><td>Parts Button Function</td><td>Local</td><td>Epicor</td><td>Ask</td></tr>
<tr><td>Labor Button Function</td><td>Local</td><td>Epicor</td><td>Ask</td></tr>
<tr><td>Allow Net Sales Excluded by Service</td><td>Yes</td><td></td><td>No</td></tr>
<tr><td>Adjusted Net Totals Exclude Invoice</td><td>Sales</td><td>Counts</td><td>Both</td></tr>
</table>

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 totals calculations

Page 7

Belts	Yes	No
Cabin Air Filters	Yes	No
Fuel Filters	Yes	No
Lights	Yes	No
Transmission Filters	Yes	No
Wiper Blades	Yes	No
Spark Plugs	Yes	No
Caps	Yes	No

All of the following options determine whether or not 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

Timer Setup

Enable Timer	Yes	No
Timer IP Address	192.168.0.75	
Timer ID	1	

 The Timer feature is used to give bay technicians a large, visible display of the current bay times of the vehicles that are being worked on. A proprietary Sage time clock is required and additional network equipment may be needed.

Email Setup

From Name	Sage Quick Lube
Subject	Invoice From Your Recent Visit
From Email Address	SageQuickLube@comcast.net
HTML File Location	\\Server\data
Reply To	SageQuickLube@comcast.net
SMTP Server	smtp.comcast.net
SMTP Port	587
SMTP Authentication	Yes / No
SMTP Username	SageQuickLube
SMTP Password	Sage123

From Name The text entered here will be displayed as the Sender on the email

Subject This will be displayed as the subject on the email

From Email Address Specify the email address that the email will be sent from

HTML File Location Specify the location that contains the HTML file to be used as the email body

Reply To Specify the email address that will serve as the reply to address

SMTP Server The Server name that handles your outgoing mail

SMTP Port The port which your SMTP server uses to send mail

SMTP Authentication Specify whether login is required for your SMTP server

SMTP Username The Username for your SMTP Server

SMTP Password The Password for your SMTP Server

POP Login	**Yes**	**No**
POP Server	pop.comcast.net	
POP Username	SageQuickLube@comcast.net	
POP Password	Sage123	
Read Receipt	**Yes**	**No**
HTML	**Yes**	**No**
Verbose	**Yes**	**No**
Encode Data	**Yes**	**No**
Priority	3	1 = High 3 = Normal 5 = Low

POP Login Specify whether POP Login is required by your 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 the 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

Estimate Setup

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

The following Utilities are available.

1. Daily Data Backup

2. Change System Date

3. Change System Time

4. Database Utilities

5. Disk Utilities

6. Computer Utilities

7. Chek-Chart/ PM Setup

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).
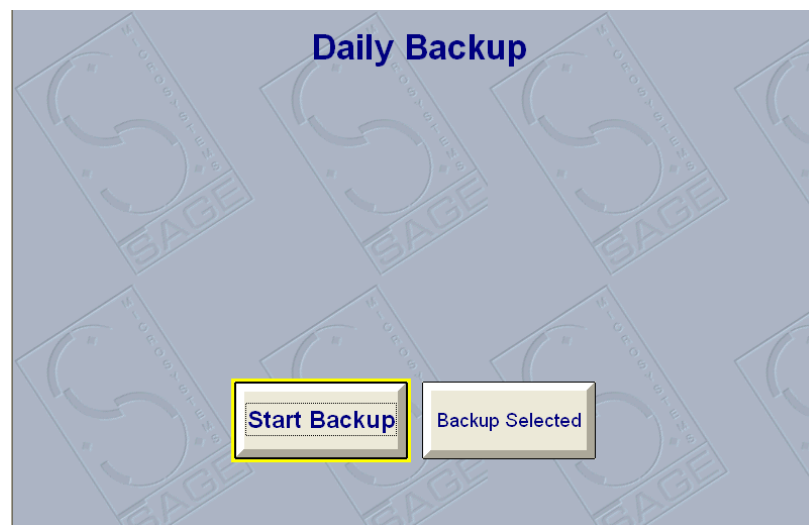
Start Backup This will start the backup to a pre-formatted CD-RW disk or Flash Drive (as selected in Backup Setup). You will see a status displayed when the backup starts – do not disturb the computer during this process, or attempt to launch QuickTouch on any other computer.

QuickTouch now offers the ability to backup your daily data to the more convenient 'Flash Drive' technology, rather than the standard CD backup that you have been using. These flash drives should be 2GB or larger to ensure that all your data will be saved. 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 Selected This will prompt you to select a particular file for backup. This will only need to be used when instructed by a Sage Support Technician.

Cancel Cancels the backup process.

Change System Date

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.

Change System Time

This allows you to change the time 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 time 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.
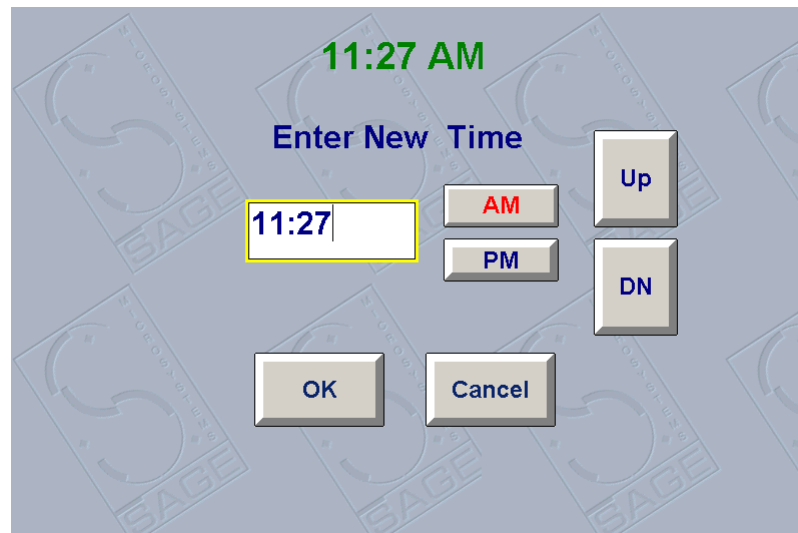
Database Utilities

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

Disk Utilities

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

Computer Utilities

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

Page 1

Computer Type — Cashier | Bay Station | CStore

Allow Day End From This Computer — Yes | No

Computer ID 1   Store ID 1   Reset Store IDs

Print Store ID with Invoice Number — Yes | No

Clear All Users

Database Path — c:\Program Files\Quicktouch\data

Print Workorder From This Computer — Yes | No

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.

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Modules

QuickTouch Pro

The QuickTouch Pro module is our premier software package which includes an array of advanced features. From small two bay shops all the way up to large scale operations, over 90% of our customer base subscribes to the QuickTouch Pro module as the benefits and ROI are realized almost immediately.

Key Features include:

- CarFax QuickVin

- CarFax Service Network

- Oil Light Reset Procedures

- Fuel Filter Graphics and Installation Instructions

- Cabin Air Filter Graphics and Installation Instructions

- Serpentine Belt Routing Graphics and Installation Instructions

- Transmission Graphics and Installation Instructions

- Non-Severe Service Intervals (Preventive Maintenance) for Lube related services

- Network Stations

- Manufacturer Catalog information for Cabin Air Filters, Fuel Filters, Belts, Transmission Kits, Wipers, Caps, and Spark Plugs (select vendors)

- Third Party Data Export capabilities

- Active Management System (AMS, or texting)

- QuickBooks GL Export **Requires one time setup fee of $599

Preventive Maintenance

The Preventive Maintenance module includes all of the features of QuickTouch Pro, plus additional preventive maintenance recommendations, such as Timing Belt, Spark Plugs, etc.

VIN Scanning/Decoding

VIN Scanning/Decoding can be added to either QuickTouch Pro or Preventive Maintenance, but is not a stand-alone module. A Sage approved scanner is recommended for proper function, though other scanners may work.

Epicor Integrated Service Estimator (ISE)

The Epicor Integrated Service Estimator, or ISE, is a robust add-on to QuickTouch's simple, easy-to-use interface. The following pages will explain everything you need to know about ISE and how it can streamline your business and improve your ROI.

Add Powerful, Worry-Free eCatalogs, Estimating And Parts Sourcing to your QuickTouch System

Quickly identify all parts, labor, vehicle specifications, and miscellaneous components needed for each job...all on a single page!

Real time connectivity to your suppliers. See your acquisition cost, calculated or suggested selling price and availability.

Click on the part link providing instant access to part images, specifications, TSBs, OE cross reference, manufacturer warranties and more.

Increase your average ticket amount and add to your bottom line with automatically suggested related jobs.

Integrated Service Estimator™

Integrated Service Estimator (ISE) is a solution that adds a robust eCatalog and mechanical estimating capabilities to your QuickTouch system. As an integrated "add-on" module, ISE helps you quickly expand your range of services to include full mechanical repair without the cost of adding an additional system.

State-of-the-art sourcing and eCatalog means no paper catalogs or phone calls

- World-class parts, labor and jobs databases help ensure the right service job is quoted accurately and efficiently

- Quickly find parts, time and labor and more by repair job, keyword search, or categories and groups

Integrated with QuickTouch

- Launched from within QuickTouch, ISE opens a mechanical estimate with the customer, vehicle, user, and store information already populated
- All parts, labor and pricing information generated in ISE are automatically transferred to QuickTouch where the invoice can be completed
- Order parts from your local suppliers right from within QuickTouch eliminating timely phone calls and costly mistakes

Product features

- **Epicor PartExpert** – More than 4.8 million parts from over 3,900 manufacturers
- **LaborExpert** – Aftermarket flat rate labor guide
- **Integrated Ordering** – Provides access to the vast network of car part suppliers
- **Vehicle Specifications** – Torque specifications, fitting and plug size, spark plug gaps, ball joint tolerances, rotor discard measurements, brake specifications
- And more…

Benefits

- Connect with eCatalog and mechanical estimating
- Time and labor guides
- Access parts, labor and jobs database to quote jobs accurately
- Integrated within your current QuickTouch system
- Understand part costs and availability at your local parts supplier

Epicor Integrated Service Estimator (ISE) Settings

In this guide we will discuss how to setup Epicor ISE within QuickTouch. We will discuss Epicor services only.

Epicor Service Settings

1. From the main menu of QuickTouch, Touch #3 'Inventory and Service Management'
2. Touch # 3 'Service Management'
3. Touch #1 'Service Maintenance'
4. Touch the ![Add] button at the top of the page
5. Type in the Service Name as you would like it to appear

Parts Pricing Method: The Parts component of the total service price can be priced using several methods. Fixed pricing means the parts price will be the same for all vehicles. Variable pricing will prompt the cashier to enter the amount the customer will be charged. The variable parts pricing method is generally not used. Actual Parts pricing will charge the customer based on the actual parts used during the service (this would be used for services such as Air Filter, Wiper Blades, Fuel Filter, PCV Filter, etc).

When using Epicor you can still use all three of the pricing methods, but if you want Epicor to tell you the price of the part, you need to select 'Actual Parts'. This allows Epicor to calculate the selling price based on the cost and markup amounts in your system.

Labor Pricing Method: The Labor component of the total service price can be priced using several methods. Fixed pricing means the labor price will be the same for all vehicles (generally for most services). Variable pricing will prompt the cashier to enter the amount the customer will be charged. This method 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 in the vehicle, you might wish to charge more or less for the service.

When using Epicor you can still use these labor pricing methods, but you also have the option to use Epicor's labor pricing or prompt your system to ask which method to use. We will further discuss these options on the next page.

Pages 2 – 6 of Service Maintenance remain the same.

Page 7 contains all of the new Epicor ISE settings for each service. Please note that each service you setup could have different settings.

Repair Interface Service Code: If you want to use ISE with a service, something must be selected for this field. It is how we link the QuickTouch service to ISE's Job Code.

Note: the first page of Job Codes are the Job Code Groups. You could create a service which then includes all Job Codes inside that Group. This is very useful for QuickTouch Reporting and understanding what services are being sold without having to create all 400 new services.

Prompt For Epicor Interface: If set to 'No' the system will automatically load Epicor ISE. If set to 'Yes,' the system will prompt the user to select if they want to do everything locally (as currently done inside QuickTouch) or go out to ISE.

Use Which Labor Rate: This option designates if the system uses QuickTouch's labor rate which is setup on Page 1 or the ISE's labor rate you selected when building the Estimate inside ISE.

Use Which Labor Description: This option designates if the system uses Epicor's labor description or QuickTouch's labor description which was setup on Page 6.

Show Labor Rate and Hours in Description: Epicor's labor description includes the hours and rate for the particular labor by default. Some shops don't want to show the exact break down of their hours on the invoice, so select 'No' to remove it.

QuickTouch Reference Manual

Epicor General Settings

Owner Setup

1. From the main menu of QuickTouch, Touch #8 'System Management'
2. Touch # 2 'General Setup Options'
3. Touch 'Forward' to Page 2
4. Touch 'Owner Setup'

On Page 1, you will see that a new flag has been added, 'Enable extended Invoice screen editing (Epicor)'. This flag allows the user to edit the parts and labor pricing on the blue grid screen once back in QuickTouch.

On Page 6, you will see that two new flags have been added, 'Parts Button Function' and 'Labor Button Function'. These two new flags allow you to setup your 'Parts' and 'Labor' buttons on the blue grid screen to automatically go to Epicor, Local or Ask (Prompt).

Estimate Setup

1. From the main menu of QuickTouch, Touch #8 'System Management'
2. Touch # 2 'General Setup Options'
3. Touch 'Forward' to Page 2
4. Touch 'Estimate Setup'

Estimate Type: This field is where you can change the look of the estimate that prints from QuickTouch. If left blank, the system will use the same type as your Invoice.

Note: This field allows you to add a message to the estimate. You would normally enter in something to let your customer know how long the estimate is valid for.

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.

Creating an Estimate with Epicor ISE

In this guide we will discuss how to build an estimate using QuickTouch and Epicor ISE.

Express Estimate: This is useful when a customer calls and would like a quick estimate. They normally don't know their vehicle's VIN or License Plate, so you aren't required to input this information.

Full Estimate: This is mostly used for customers who are already in the shop. Since you already know the customer's License Plate and VIN, you can build a full estimate for that customer.

Creating Express Estimate from Menu
6. From the main menu of QuickTouch, Touch #1 'Cash Register Mode'
7. Touch # 6 'Estimate'
8. Touch 'Express'

9. Select the Year, Make, Model, and Engine of the customer's vehicle
10. Add the services to the blue grid screen as you normally would
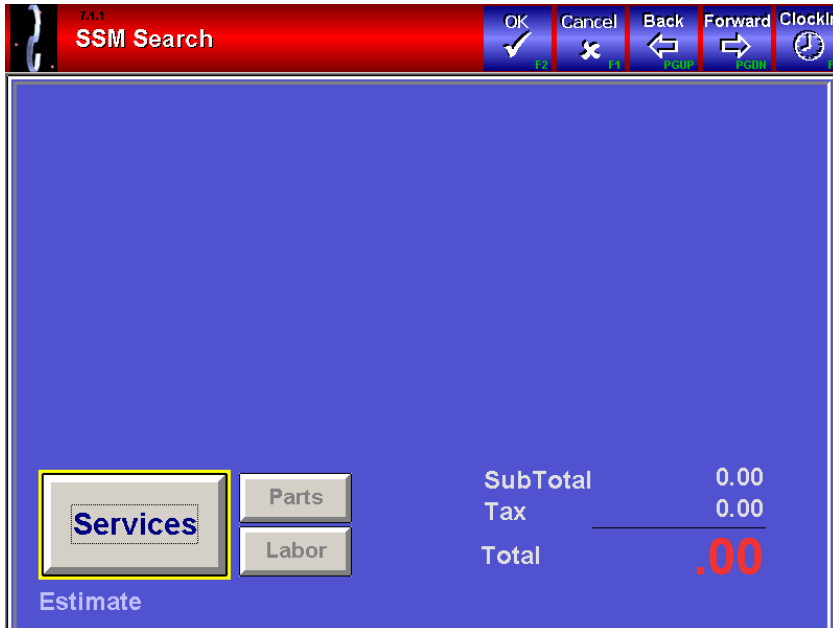
11. Once you click an Epicor service, the system will load Epicor. Create and build your estimate inside Epicor.
12. Once complete, click 'Transfer & Exit' or 'Post and Return' depending on which Epicor screen you're on.
13. Once back in QuickTouch, click 'OK' at the top. You will be prompted to save to the Bay Screen, then print.
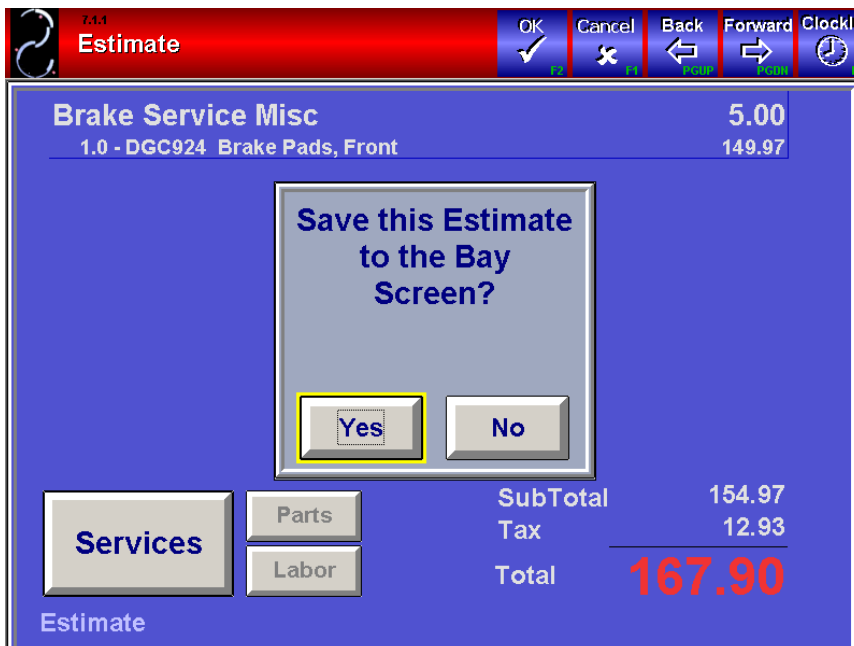
14. If you go to the bay screen, you will now see the new estimate you created. Since it was an Express Estimate, there is no license plate or customer associated with it.

15. To add more information to the estimate, you can click on the word 'TEMP' and edit the information.

Creating Estimate from Bay Screen

1. From the main menu of QuickTouch, Touch #1 'Cash Register Mode'
2. Touch # 1 'Bay Screen'
3. Type in customer license plate or name, just as you normally would to check in a vehicle
4. On the first customer screen, you will see a new option at the top of the page, 'Estimate'. If you touch Estimate, you will create an estimate instead of the normal invoice.

5. Repeat steps 5 – 9 from above, as you would for an Express Estimate. The only difference is that the customer is now associated with the estimate you created.

NOTE: VIN and Mileage are required by Epicor. VIN is needed so the ISE can understand the vehicle information. Mileage is needed so the ISE can recommend service intervals.

Epicor Integrated Service Estimator (ISE) Reporting

In this guide we will discuss how reporting in QuickTouch will work with Epicor. Understanding how the system will report your repair job is important, so we've created a flexible reporting system in order to help better run your shop.

Epicor Job Code Hierarchy Reference

Service with Job Code (Specific service to specific job code)

Service with Job Code Group (Specific service to group that contains many job codes)

Service with Job Code = [MISC] Miscellaneous Service (Used as a "catch-all" for job codes that are not linked to anything else)

Parts and Labor (If no MISC service is setup and a job code is not linked to a service, then it will be listed as Parts and Labor and show up under the "Non-Service Sales" section of the Sales reports)

When you create a QuickTouch service it must be associated with an Epicor Job Code or Epicor Job Code Group so that QuickTouch understands how to link it to Epicor. We talked about this in the 'Epicor Integrated Service Estimator (ISE) Settings' Guide. Please refer to that guide if you have questions about setting up services. With this associated Epicor Job Code or Epicor Job Code Group, QuickTouch will understand which service should get credit for the sales on various reports. See examples of this on the following page.

Example of Hierarchy with [MISC] catch all:

Sage Service Name	Sage/Epicor Link (Page 7)	Epicor Job Code	Epicor Job Code Group
Replace Park Light	ERPL	ERPL	Electrical
General Electrical	Electrical	-	Electrical
Misc Service	[MISC] Miscellaneous Service	-	-

In Epicor ISE, I sell a Parking Light [ERPL], Tail Light [ERTL], Brake Light [ERBL] and Radiator [CRAD]. QuickTouch will report the sales as:

Service Name	Quantity Sold	Epicor Job Codes Sold
Replace Park Light	1	ERPL
General Electrical	2	ERTL, ERBL
Misc Service	1	CRAD

Example of Hierarchy without [MISC] catch all:

Sage Service Name	Sage/Epicor Link (Page 7)	Epicor Job Code	Epicor Job Code Group
Replace Park Light	ERPL	ERPL	Electrical
General Electrical	Electrical	-	Electrical

In Epicor ISE, I sell a Parking Light [ERPL], Tail Light [ERTL], Brake Light [ERBL] and Radiator [CRAD]. QuickTouch will report the sales as:

Service Name	Quantity Sold	Epicor Job Codes Sold
Replace Park Light	1	ERPL
General Electrical	2	ERTL, ERBL
Non-Service Parts/Labor	Quantity Sold	Epicor Job Codes Sold
Parts	1	CRAD
Labor	1	CRAD

NexGen Express

The NexGen Express module is a web-based reporting suite for offsite management.

NexGen Professional

The NexGen Professional module includes the reporting suite and has other extended functions for offsite management which include Multi-store fleet management, multi-store or remote inventory management, and customer/history sharing between locations.

Discussions

Included in this section are several miscellaneous topics that bear further discussion.

1. Gift Certificates / Gift Cards Stock Reorder Report
2. Stock Reorder Report – How to Set Up Items Using the Fixed Method
3. Miscellaneous Parts and Labor / Parts On The Fly / Labor On The Fly
4. Backing Up QuickTouch
5. Lexmark Printer Quick Guide
6. QuickTouch Version 7.0.0 Release Notes
7. QuickTouch Version 6.6.2 Release Notes
8. Installing Replacement Hardware

Gift Certificates / Gift Cards

A new Gift Card or Gift Certificate System has been implemented (QuickTouch Version 6.5.6, January, 2005). Gift Card sales are itemized out of the net sales in various places throughout the QuickTouch reports (Daily Sales Report, Sales Journal, Vital Statistics). *They are revenue and part of total sales* but are then treated similar to pay-ins or fleet payments since nothing was actually sold. The sale is counted when the gift is redeemed. They are included in the end-of-day cash drawer for bank deposits. You may be able to make arrangements with your credit card processing company to assign and track the value of each card you sell to your customers. Generally, it would involve a swipe of the Gift Card through the credit card machine and the card is then activated and can be sold for that amount. Your credit card company then tracks the value on the card.

Since gift cards are not considered 'true sales', the QuickTouch reports have been modified to reflect the separated 'Gift Card Sales'. The reports that have changed are as follows:

Daily Sales Report:

In 'Invoice Summary', gift card sales show up in one of the following 3 ways. If they are sold with other services on a customer invoice, they will be included in the 'Total Non-Quick Sales Processed' section with a separate line for the 'Gift Card Invoice Sales' portion separated out. If they are sold with other parts or services on a Quick Sale, they will be included in the 'Total Quick Sales Processed' section with a separate line for the 'Gift Card Quick Sales' portion separated out. If they are sold alone on a customer invoice or alone on a Quick Sale, they will be included in a new section called 'Total Gift Card Sales Processed'.

In 'Service Sales', gift card sales show up as a new line item. Counts and dollar amounts are shown similar to all other services sold.

In 'Register Summary', gift card sales are included in the 'Total Sales' but are itemized under the 'Net Sales' to allow them to be separated in the accounting system.

Weekly Sales Journal:

In 'Svc. Order Tickets', gift card sales included on customer invoices or quick sales are included in the 'Invoice' and 'Quick Sale' totals, respectively, similar to the Daily Sales Report.

Gift card sales sold alone are shown on a new separate line for the 'Gift Card' only sales.

In 'Service Sales' and 'Service Counts', the Gift Card services are shown with the other services sold including counts and dollar amounts.

In 'Register Summary', gift card sales are included in the 'Total Sales' but are itemized under the 'Net Sales' to allow them to be separated in the accounting system.

Vital Statistics (Report):

In 'Service Sales', gift card sales show up as a new line item. Counts and dollar amounts are shown similar to all other services sold.

In the 'Sub Totals' and 'Totals' sections that follow, gift card sales are subtracted out.

In 'Sales Info', gift card totals are added as an itemized amount and the 'Total w/ Tax:' includes them.

To implement the Gift Card program, the option needs to be activated in Owner Setup, a new Pay Type has to be added for redemption tracking, and a new service has to be added so the Gift Card can be sold. There is a new 'Yes/No' question added to service setup to ask if the service should be treated as a Gift Card.

Installation:

1.) To activate the gift program, go to System Management, General Setup, Owner Setup, go to page two, fourth line down asks; 'Allow Gift Cards'. Touch the 'Yes'. Then type in a '1' for the 'Max. Number of Gift Card Services'. Remember, these services show up in the list of services sold detail but are not included in the accounting net sales.

2.) In System Management, General Setup, Pay Type Setup, and touch the green 'Add' button at the top. Type in the name of the payment button that will show up at the end of the transaction (e.g. 'Gift Card', 'Gift Certificate'). 'Treat Like:' should be set to Credit Card. Type in a dollar limit if you choose to limit the amount on any one card, type in a sort order that will position that payment button on the final invoicing screen relative to the other payment types. Answer 'Fleet Link:' as 'No' and skip the 'Fleet Name:' field, and choose whether you want the drawer to open when invoices are paid with a Gift Card. Touch 'OK' to save it. The next invoice you do will have this new pay type as a payment option.

3.) Next go to Inventory and Service Management, Service Management, Service Maintenance, and touch the green 'Add' button on the red top bar. Type in the service name for the Gift Card that will appear on the customer's invoice. For the 'Labor Pricing Method', choose 'Fixed' if you want the gift to be sold for the same price every time or choose 'Variable' if you want it to ask for the sales amount. Type in the fixed price amount or the minimum and maximum variable amount in the fields provided. Press the 'Page Down' twice and specify the 'Display Sort Order' position you would like to see the gift service button appear relative to all the other service buttons. Press 'Page Down' three more times and touch 'Yes' next to the 'Gift Card Service' question. This will make this service's sales be excluded as described above.

Stock Reorder Report – How to Set Up Inventory Items Using the Fixed Method

The Stock Reorder Report automatically calculates what to order to get each item to its 'Target number'. All criteria is entered in Item Maintenance. This describes how to enter the correct information to get an accurate order for each item.

Follow these steps in order for each item.

- Order Frequency. When do you make orders? Every week or every two weeks is normal. Ask this question first.

- Target. You must have a 'target' number for each item. The target number is the number of units you want on hand after each order is restocked in the computers inventory.
  Example: A common oil filter has a high target number of 150. (I want to start each week with 150 OF1's in inventory.)

- Item Maintenance. Enter item maintenance. Pick a group and Item. Go to the second page of item maintenance. There you will find the options that deal with the reorder report.

- Carton Quantity – How many per case. (OF1 comes 12 per case.)

- Minimum On hand in Units – When I hit this number, I need to order more immediately! Also, If the minimum unhand flag is turned on, a pop up message will let the customer know they hit the minimum unhand level for this item. (OF1 is popular. 24 is the minimum. This will give me time to order them and receive the order before I get to zero)

- Standard order in Cartons – How many cases should I order if I am at my minimum unhand number? (When I get to the minimum unhand of 24 OF1's I want to order 11 cases to get me back to my TARGET number)

- Now the question is, why 11 cases? See below.

Here is the calculation for regular items.

(Carton quantity) x (Standard order) + (Min unhand) = (TARGET number)

(12) x (11) + (24) = 156

Here is the calculation for Bulk Oil

(Carton quantity) x (Standard order) + (Min unhand) = (TARGET number)

(Always 4)　　　x　(In Gallons)　+　(In Quarts)　= (TARGET is in quarts)

- Adjust the Standard order to adjust your target number. In Theory, the carton quantity and Min unhand do not change (rarely).

- Whenever you run your REORDER Report, it will tell you how many cases you need to order to get you to your TARGET number. You can run it every day, week, bi-weekly, it doesn't matter. Once the numbers are setup correctly it will always order the right amount of filters to get to the target number.

- The computer will always round up to the nearest carton. So in the example above, if your Target is 150 filters, it will have you order 11 cases, which is 6 more than your Target. 10 cases will not get you to 150.

- If the customer only wants to keep one in stock of a particular inventory item the setup is a little different but the calculation still applies.

(Carton Quantity) 1 x (Standard Order) 0 + (Min On hand) 1 = (TARGET) 1

Parts On The Fly / Labor On The Fly

With the ever growing complexity of the auto industry, we will always have a need to record miscellaneous parts or services onto an invoice.

Some users simply create a service called "Miscellaneous", which allows the cashier to type in the amount of the service. The biggest disadvantage to this is that at the end of the week or month, you run a sales report and all it shows is "Miscellaneous $286.25", and you have no idea what was sold or what your costs were, or if the services were even priced correctly.

With the QuickTouch "Parts-On-The-Fly" and "Labor-On-The-Fly" features, you can force the cashier to enter critical descriptive information, costs, and retail prices for every miscellaneous sale.

Parts-on-the-Fly will generally be used for "outside parts" purchases, where you purchased an item from a local auto supply store for installation into a customer vehicle.

Labor-on-the-Fly will generally be used for miscellaneous charges, such as skid plate removals or services you would not normally perform.

Using these features, you will now be able to review the pricing for every miscellaneous sale, and even be able to track all outside part purchases to QuickTouch invoices to assure that all outside parts purchases are being recorded into the system and priced correctly. This has the added advantage of being able to track recurring miscellaneous sales, to determine whether you should stock that part or offer that service as a standard.

The Parts On The Fly process is initiated from the blue Customer Checkout Service Selection screen during the invoicing process. This is done by pressing on the "Parts" button displayed here, or by entering a part number asked by a service that is not recognized.

<u>**Customer Checkout – Service Selection Screen**</u>

Press OK after entering the part number. If the part number is not recognized by the system, you will be asked to Add to Invoice. Press Yes here.

This will display the "Parts-on-the-Fly" screen, although here it is labeled "Add Parts to Invoice.

Parts-on-the-Fly (Add Parts to Invoice)

Stock Number This is the stock number that you had just entered.

Stock Description Enter the part description here.

Taxable Select Yes or No as appropriate.

Item Group Select the appropriate Item Group here. Press the arrow if the list does not display on the screen automatically. If you do not see the item group listed here, you will need to cancel and add the vendor – from the Main Menu, press Inventory & Service Management, Inventory Group Maintenance.

Vendor Select the appropriate Vendor here. Press the arrow if the list does not display on the screen automatically. If you do not see the vendor listed here, you will need to cancel and add the vendor – from the Main Menu, press Inventory & Service Management, Vendor Management, Vendor Maintenance.

Invoice Number Optional. This will be the invoice number from the auto supply store from where you purchased the outside part.

Reference This is the Cost field, but is displayed as "Reference" so that a customer will not be able to look over your shoulder and discover YOUR cost for a part, and complain about the upcharge. Press the "?" button to switch between "Reference" and "Cost".

Cost	12.99	?

Reference	*****	?

Selling Price This is the selling price you are charging the customer.

Quantity Enter the quantity of the item. The final total charge will be the Selling Price multiplied by the Quantity.

Your screen will look like this when complete:

Add Parts to Invoice

Stock Number	AF12345
Stock Description	Air Filter For BMW
Taxable	**Yes** No
Item Group	Air Filters →
Vendor	Misc Vendor →
Invoice Number	7894561230
Reference	***** ?
Selling Price	25.99
Quantity	1

Press OK at the top of the screen to post the sale. You will be asked if you want to "Add Stock # to Inventory" – this will usually be NO. If you press Yes, the stock number will be added to your inventory list, and you will need to return to Inventory Item Maintenance to complete the required information for that item.

Add Stock # to Inventory ?

Yes   No

Labor-on-the-Fly (Add Labor to Invoice)

Labor Description Enter the description of the labor charge here.

Taxable Press Yes or No.

Labor Group Fill in the labor category here.

Labor Rate, Labor Hours Optional. If you fill in the labor rate and labor hours, QuickTouch will multiply these fields to give you the Total Labor Charge.

Total Labor Charge You can type in the total charge here.

Press OK at the top of the screen when complete, and the labor will be added to the invoice.

Backing Up QuickTouch

QuickTouch has the capability to do a complete backup of your QuickTouch data every evening. This is highly recommended and will usually be turned on when your new system is installed. The backup will occur at your day end (see the Day End Procedures on page 159). You can also do a Daily Data Backup at any time.

IMPORTANT! QuickTouch will do a complete backup of the QuickTouch data only! This would include things like your customer list, inventory counts, sales reports, etc. This would not include any documents you may have created that are stored in the My Documents folder or on the Windows Desktop, or any other program data (such as QuickBooks). These other documents and data are the responsibility of the customer!

CD/DVD-RW Back Up

Backups can be done on Rewritable Compact Discs (CD-RW) or Rewritable Digital Versatile Discs (DVD-RW). One disc is included with your system, and additional CD/DVD-RW discs can be purchased locally at any office supply store – pricing tends to be about $1 per disk. Note that these are NOT CD/DVD-R discs, you need the CD/DVD-RW discs to back up your daily data.

A rotating backup is recommended – this means that you will have a disc for each day of the week. Purchase enough discs to cover your week, and label them "Monday", "Tuesday", etc. Each evening, you will be prompted during the Day End process to insert the backup disc; at this point is when you insert the appropriate CD-RW. Many customers also keep a copy of the backup off site – for instance, they'll have multiple "Friday" discs, and each Friday evening will take that backup disc home and leave it there, and bring the other "Friday" disc back in. This way, there are always multiple copies of your data available should something catastrophic happen to your computer (flood, robbery, etc.)

CD/DVD-RW discs need to be formatted when they are new out of the box, and once they are formatted they can be reused over and over again. Occasionally, a disc will go "bad" and won't allow you to do your backup – in these cases you can do a full format on it and it will be good again.

Formatting takes about 30 minutes per disc, and can be done while QuickTouch is running, but note that QT will be greatly slowed down during this process. The best time to format CD/DVD-RWs are after hours.

The backup software used by the computer is called **InCD**. The **InCD** icon appears in the system tray, which is usually in the bottom right-hand corner of the screen. The **InCD** icon shows information about the CD/DVD, which is currently in the drive or about the drive itself.

Formatting a CD/DVD-RW Disc

Remove the disc from the packaging and put it in the computer. The InCD software will determine whether the CD/DVD-RW disc needs to be formatted.

From the Windows Desktop, double-click My Computer. Right-click the D: drive. Click InCD Format.

The "Format D:\" window will be displayed. Make sure "Format" is selected (never use Quick Format), and click Start. You do not need a Label.
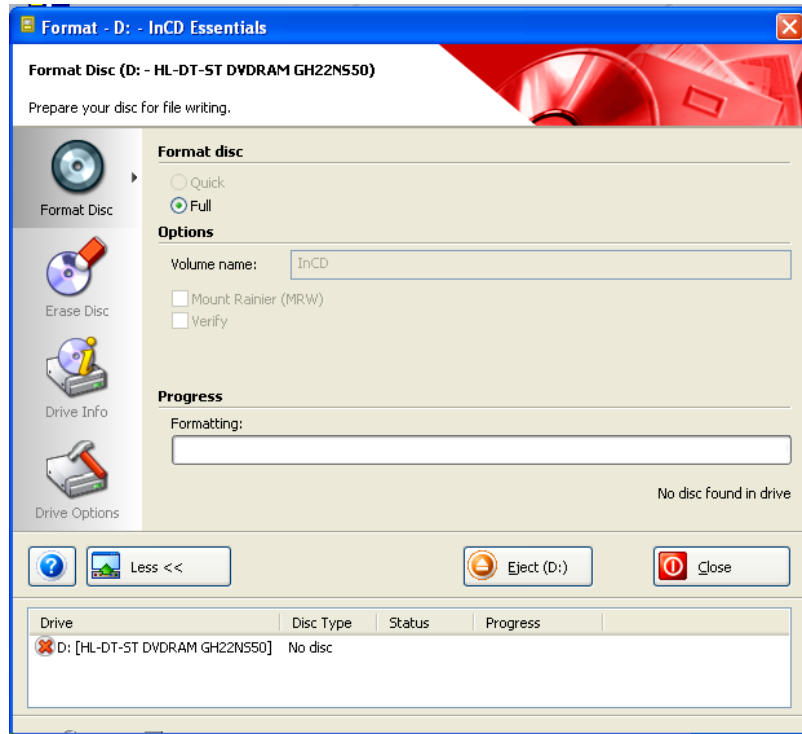
You will see a progress bar as the CD/DVD is formatted. You can move or minimize the window down if you need to launch QuickTouch.

When complete, a "Format Complete" message will be displayed. Click OK on the message, and Close on the "Format D:\" Window.

Flash Drive Back Up

QuickTouch now offers the ability to backup your daily data to the more convenient 'Flash Drive' technology, rather than the standard CD backup that you have been using. These flash drives should be 2GB or larger to ensure that all your data will be saved. The following setup procedure will enable you to make the switch:

Windows XP Setup:
1. Insert the Flash Drive into any open USB port on your XP computer
2. A pop-up message will appear indicating that new hardware has been found, installed and is ready for use
3. Use your mouse and double-click on the 'My Computer' icon on your desktop
4. In the 'My Computer' folder, find the icon for the flash drive to determine which drive XP has assigned to it (normally 'E' or 'F')
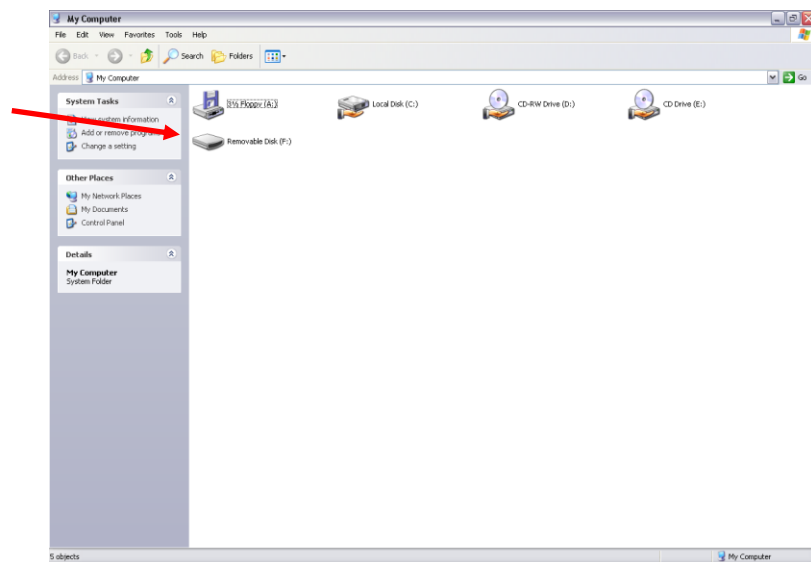
QuickTouch Setup:
5. Open QuickTouch normally (double-click the desktop icon)
6. From the 'Main Menu', touch '8' – 'System Management'
7. Touch '2' – 'General Setup Options'
8. Touch the 'Forward' button to view the second page of options
9. Touch 'Back-Up Setup'
10. On the 'Back-Up Setup' screen, select the drive letter shown in step #4 above
11. Touch 'OK'

Your QuickTouch system is now ready to backup to the flash drive. If you have any questions about your new 'Flash Drive Backup', please call Sage Technical Support at 800-724-7400.

Lexmark E460dn Troubleshooting & Maintenance Guide

In this guide we will discuss what should be done to troubleshoot and maintain the Lexmark E460dn laser printer.

1. Common Maintenance Information
2. When to Replace Toner
3. When to Replace Photoconductor Kit
4. How to Install Toner
5. How to Install Photoconductor Kit
6. How to Reset Photoconductor Kit Counter
7. Part Numbers and Pricing

Common Maintenance
Like many other kinds of printers, you need more than just the Lexmark E460dn laser printer itself to properly use the printer. You also need the toner cartridge, which supplies the printer with ink (a powder) and the Photoconductor Kit (PC Kit) which transfers the ink from the toner cartridge to the paper. Both of these units will need to be replaced as the printer notifies you. Frequency of replacing the toner and PC Kit varies depending on your printing volume.

Please note that the number of pages printed per toner cartridge is an estimate from Lexmark and meets with the ISO/IEC 19752 Standard. The printed page used in their estimate is a standard page with about 5% coverage, which is similar to our average invoice.

When to replace the toner?
Your printer will let you know when the toner needs to be replaced, however just because it says replace toner, doesn't necessarily mean it has to be done immediately. Since the toner is a powder, it can easily stick to the sides and top of the cartridge. When your printer says you are low and/or out of toner, take the toner out and shake it from side to side and top to bottom, loosening any residual toner stuck to the sides/top of the cartridge. **Be careful not to hit or drop the cartridge when shaking it.**
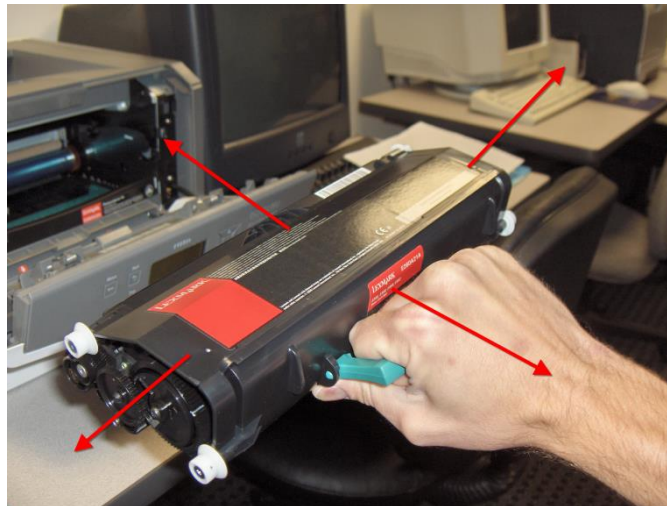
When to replace the Photoconductor Kit?
The Lexmark E460dn contains a page counter and it will warn you when it's time to replace the photoconductor kit. If your printed page still looks fine, it has no light spots, dark spots or missing words, you can reset the counter and continue to use the existing PC Kit for a little while longer. If the printed page is too light, dark or missing words, you should replace the PC Kit as soon as possible. Whether you choose to replace the PC Kit immediately or not, **you will need to reset the Photoconductor Counter.**

How to install toner

1. Turn off power; switch is located on the back of the printer.

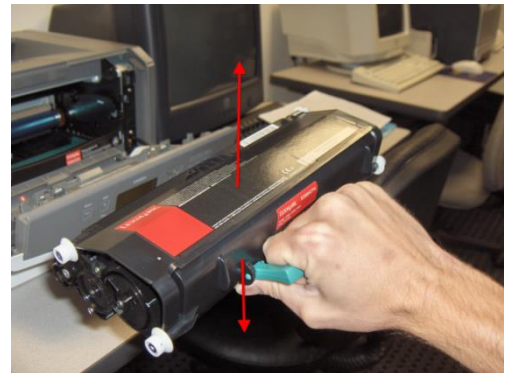2. Press button on left side of printer to open the front door.

3. Press the release button at base of cartridge with thumb. Grasp the handle and pull up and out to remove the toner cartridge.

Note: Photoconductor Kit will remain in printer

4. Unwrap the new toner cartridge. Lightly shake the new toner up and down to evenly distribute the toner.

5. *Lightly shake the new toner from side to side to evenly distribute the toner.*

6. *Install the new toner by aligning the white rollers on the cartridge with the white arrows on the tracks of the photoconductor kit. Push in the toner cartridge as far as it will go (you should hear a click).*
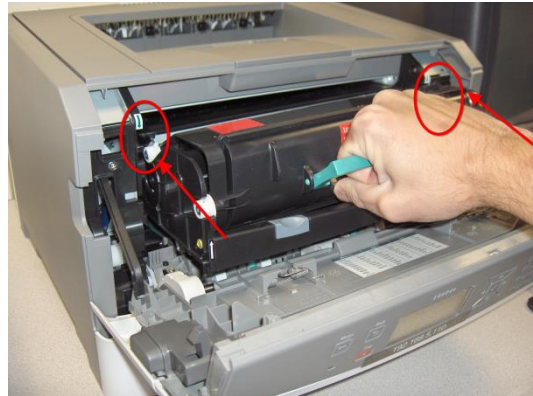
7. *Close the front door of the printer.*

8. *Power the printer back on.*

9. *The printer LED Panel should read "Ready" if correctly installed.*

How to Install Photoconductor Kit

1. *Turn off power; switch is located on the back of the printer.*

2. *Press button on left side of printer to open the front door.*

3. *Grasp the handle and pull up and out to remove toner cartridge and photoconductor kit.*

4. *Separate the toner cartridge and photoconductor kit by pressing the release button on the PC Kit (circled) and pulling up and out.*
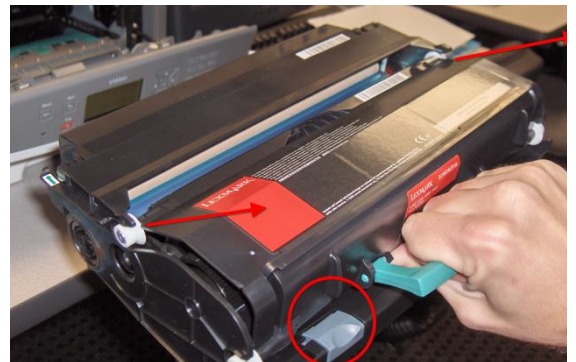
5. *Unwrap the new photoconductor kit. Do not touch the roller because it will affect the quality of future print jobs.*
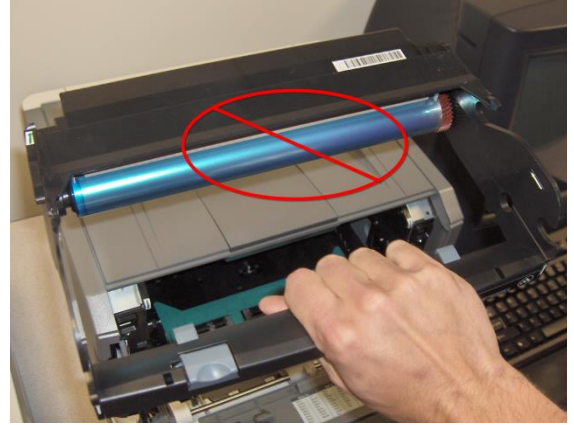
6. *Install the toner cartridge back into the photoconductor kit. You should hear a click when the cartridge is completely pushed in.*
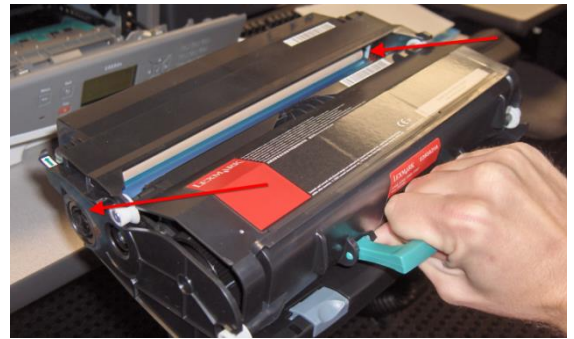
7. *Insert the toner and photoconductor kit back into the printer.*
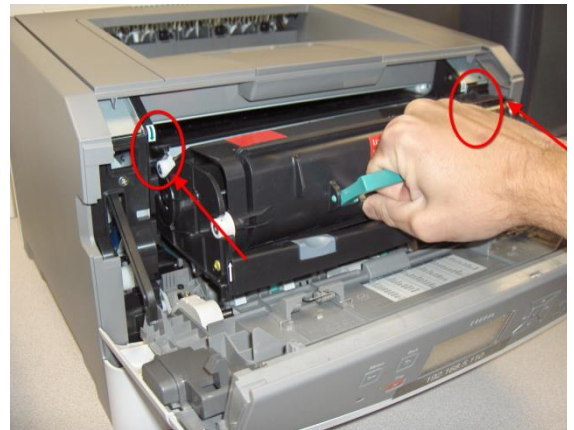
8. *Close the front door of the printer.*

9. Power the printer back on.

10. The printer LED Panel should read "Ready." Reset the PC Counter.

How to Reset PC Counter
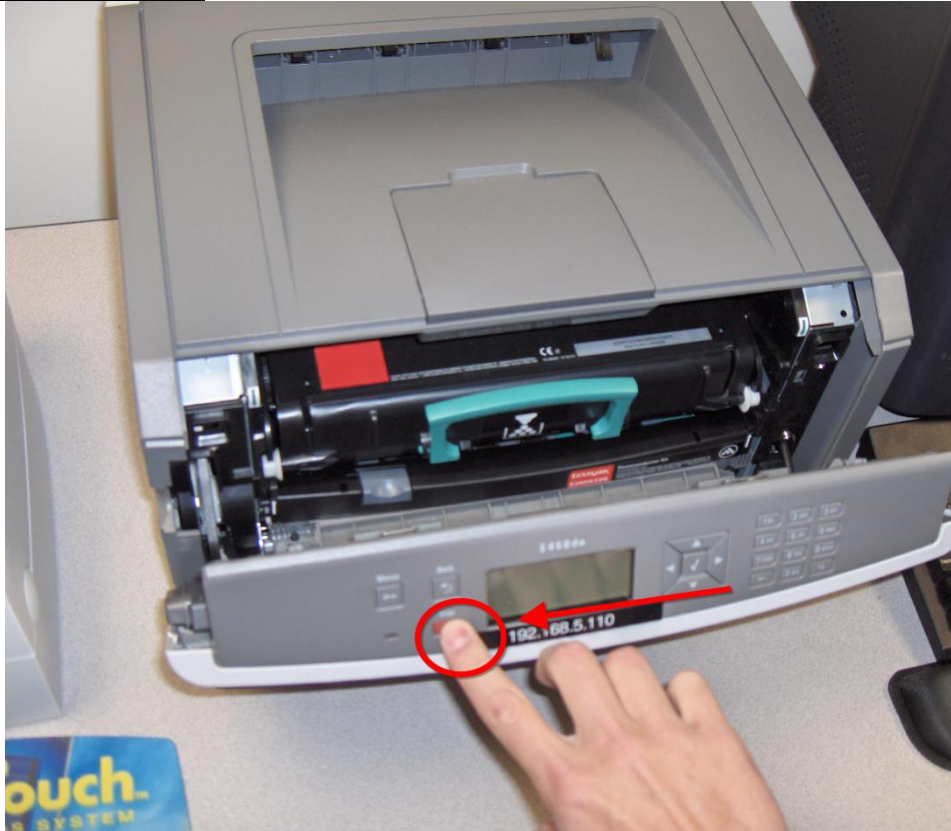
After you replace the photoconductor kit, reset the photoconductor counter.
To reset the photoconductor counter, open the front door of the printer (while still powered on), press and hold X until 'Resetting PC Counter' appears. The power light will blink and the printer will beep when the PC counter is finished resetting.

Hardware/Accessory Part Numbers and Pricing (from Lexmark.com):
Hardware
  ☐ Lexmark E460dn #: 34S0700

Accessories
  ☐ 250-Sheet Drawer #: 34S0250 ($129)
  ☐ 550-Sheet Drawer #: 34S0550 ($199)

Toner/Photoconductor Kit
  ☐ Regular Toner #: E260A11A ($100.99 with Return) Note: Yields 3,500 Pages
      ○ 2.88 ¢/page
  ☐ High Yield #: E360H11A ($202.99 with Return) Note: Yields 9,000 Pages
      ○ 2.25 ¢/page
  ☐ Extra High Yield #: E460X11A ($262.99 with Return) Note: Yields 15,000 Pages
      ○ 1.75 ¢/page
      *Sage's recommended best buy
  ☐ Photoconductor Kit #: E260X22G ($26.99)

QuickTouch Version 7.0

Welcome to QuickTouch 7!

We at Sage are pleased to announce the release of our 2011 QuickTouch program upgrade, Version 7.0 . This upgrade includes numerous new features, many of which came from you, our customers, as requests to help you better run your business.

Please follow the attached steps to install your new version of QuickTouch. This should take about 5-25 minutes for each computer (Note: The upgrade will run considerably faster on bay station systems). Once you have started, you must run the upgrade on all of your computers before using ANY of them.

PLEASE NOTE: there are several setup changes you will need to make in QuickTouch, after the upgrade is complete, to allow you to take advantage of the new features.

QuickTouch Version 7.0 Program Upgrade

Upgrade Installation Instructions:

This upgrade must be installed on <u>ALL</u> computers!

1. Exit out of QuickTouch and return to the Windows desktop on **ALL** computers.

2. If there is more than one computer to upgrade, **start with the Server (Main)** computer.

3. Insert the enclosed Upgrade CD into the CDROM drive.

4. The Upgrade Program should automatically start. If it does not, touch **Start**, **Run**, and type **D:\Sage\Upgrade,** then touch the **OK** button.

5. This will display a window prompting: "Are you sure you want to upgrade *QuickTouch*?" Touch **Yes.**

6. The upgrade process will start and will run until it is complete.

7. When the upgrade is finished, a message will appear – *"Upgrade Complete."* Touch **OK.**

8. Remove the Upgrade CD.

9. Repeat steps 3 through 8 on each computer on which QuickTouch is installed (each bay station, greeter station, back office, etc.).

Program Setup Instructions:

There are many new and beneficial features built into this upgrade. To take full advantage of them, you will need to make setup changes inside QuickTouch. Setup changes are system-wide, which means you can make the changes on any QuickTouch computer and the changes will take effect on all QuickTouch computers. Please note: system setup changes will take effect after completely exiting out of QuickTouch.

Please read the complete upgrade document for instructions on taking advantage of all of the new features available in QuickTouch Version 7.0.

If there are any questions concerning this upgrade, please contact Sage Customer Services at **(800) 724-7400.**

Updated Employee Sales Tracking Report

Now Group by Employee

Date Selection

| All Dates | Select Range >> |

Start 5/10/2010

End 05/24/2010

Position Selection

| Manager | Upper Bay |
| Courtesy | Lower Bay |

Group By

| Position |
| Employee |

Grouping Codes

| Include |
| Exclude |

The Employee Sales Tracking report has been modified to display the results by Employee and Position. For individual employees, you can now see a breakdown of each service sold, including the percentage of customers and sales for that service.

Employee:

	--UPPER BAY--		
	# Inv	**Total Time**	**Avg Time/Car**
Details	5	284.63	56.93

Service	**Count**	**Amount**	**% Sales**	**% Cust**	**$/Invoice**
Totals		338.91	100.0%	100.0%	67.78
Full Service Oil Change	5	274.95	81.1%	100.0%	54.99
Full Service Blend	1	58.99	17.4%	20.0%	11.80
Full Service High Mileage	1	58.99	17.4%	20.0%	11.80
Full Service Oil Change	2	77.98	23.0%	40.0%	15.60
Full Service Synthetic	1	78.99	23.3%	20.0%	15.80
Full Service 4x4	0	0.00	0.0%	0.0%	0.00
Supreme It	0	0.00	0.0%	0.0%	0.00
Super Supreme It	0	0.00	0.0%	0.0%	0.00
Air Filter	2	43.98	13.0%	40.0%	8.80
Fuel Filter	0	0.00	0.0%	0.0%	0.00
AC Service- Freon Only	0	0.00	0.0%	0.0%	0.00
Engine Flush	0	0.00	0.0%	0.0%	0.00
Lights	0	0.00	0.0%	0.0%	0.00
PCV Valve	1	19.98	5.9%	20.0%	4.00
Power Steering Flush Ser	0	0.00	0.0%	0.0%	0.00
Additives And Treatment	0	0.00	0.0%	0.0%	0.00
Rear Differential Service	0	0.00	0.0%	0.0%	0.00
Emission Service	0	0.00	0.0%	0.0%	0.00
Cooling System Flush	0	0.00	0.0%	0.0%	0.00
Automatic Transmission	0	0.00	0.0%	0.0%	0.00

11AM - 12PM	4	279.92	82.6%	80.0%	55.98
12PM - 1PM	0	0.00	0.0%	0.0%	0.00
1PM - 2PM	0	0.00	0.0%	0.0%	0.00
2PM - 3PM	1	58.99	17.4%	20.0%	11.80

To print or view this report, from the Main Menu:

1. Touch #4, Employee Management

2. #5, Employee Reporting

3. #4, Employee Sales Tracking

4. Select your report parameters

5. Touch Print or Print Preview

Columns Included: Service Count, Total Sales Amount of the service, Percent of Sales of the service, Percent of Customers that received the service and Service Dollar Amount per invoice.

The report now also shows traffic breakdown for the employee being reported.

Purchase Orders

Breakdown each Inventory Item Group and Include Subtotals

Stock #	Description	Last Cost	Quantity On Hand in Units	Carton Quantity	Actual Order Carton	Cost
AIR FILTER						
AF3	AIR FILTER	1.5000	3	1	7	10.5000
AF4	AIR FILTER	1.5000	6	1	4	6.0000
				Total AIR FILTER:		**16.5000**
CABIN AIR FILTERS						
C15044	CABIN AIR FILTER	9.0000	2	1	3	27.0000
				Total CABIN AIR FILTERS:		**27.0000**
OIL						
520	(CA52-12) Castrol 5W20 Bu	2.5000	80	1	500	1,250.0000
530	(BCA53) Castrol 5W30 Bulk	2.5000	301	1	500	1,250.0000
				Total OIL:		**2,500.0000**
OIL FILTERS						
SO16S	OIL FILTER	1.5000	56	1	12	18.0000
SO1A	OIL FILTER	1.5000	19	1	12	18.0000
				Total OIL FILTERS:		**36.0000**
WIPER BLADES						
B40519	WIPER BLADE	3.0000	8	10	6	180.0000
				Total WIPER BLADES:		**180.0000**
				Total Cost:		**2,759.5000**

Inventory item groups will be broken down and include subtotals on Purchase Orders for easier inventory management.

Daily Sales Summary (Date Range)

Summaries for One Day, Week To Date, Month To Date and Date Range now available

Daily Sales Summary

Start Date 5/24/2010

End Date 5/24/2010
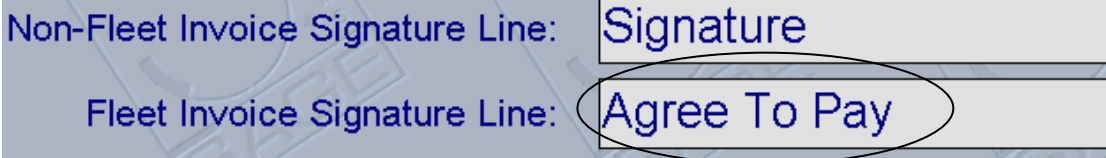
[One Day] [Week To Date] [Month To Date] [Date Range]

Get your summaries for a date range, allowing you to see your Hourly Summary and more...

Change Signature Line On Invoices
Allows you to choose what words you want to say on your Invoice Signature Line

Non-Fleet Invoice Signature Line:	Signature
Fleet Invoice Signature Line:	Agree To Pay

Designates what your customer is agreeing to by signing the invoice.

To utilize this feature, from the Main Menu:

1. Touch #8 System Management

2. #2 General Setup

3. Touch 'Invoice Setup'

4. Touch 'Forward' to Page 3

5. Change from the default 'Signature,' to whatever you would like it to say

Updated Required Customer Fields
Require Email Address and/or Customers' Gender

| Require Email Address	Yes	No
Display/Require Customers Gender	Yes	No

This new feature allows you to start collecting more data about your customers. More detailed customer information means better marketing opportunities. E-mail is becoming a more and more prominent customer contact method.

If 'Require Email Address' is set to 'No', your employees will be able to touch 'Email (Opt Out)' and bypass the capturing of customer emails.

This appears at the bottom of Customer Check In/Maintenance Page

To utilize this feature, from the Main Menu:

1. Touch #8 System Management

2. #2 General Setup

3. Touch 'Forward' to Page 2

4. Touch 'Owner Setup'

5. Touch 'Forward' to Page 3

6. Touch 'Yes' on either or both 'Require Email' and 'Require Gender'

7. Touch 'OK' to save your changes

Email (Opt Out)	Support@sagesystem.com

Gender	Male	Female	Unspecified
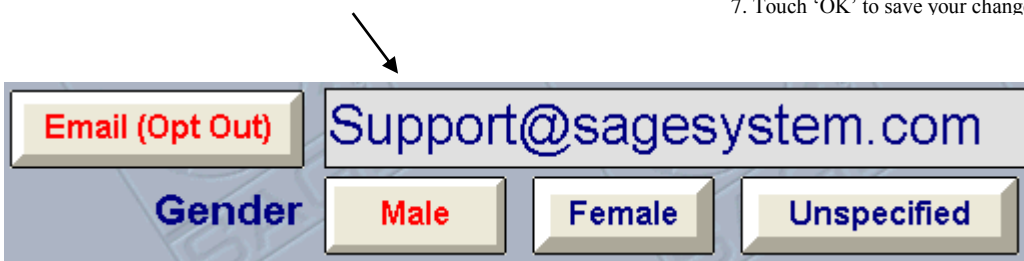
Require Employees to be selected from Employee List

Reduces errors by requiring selection from the employee list during check-out

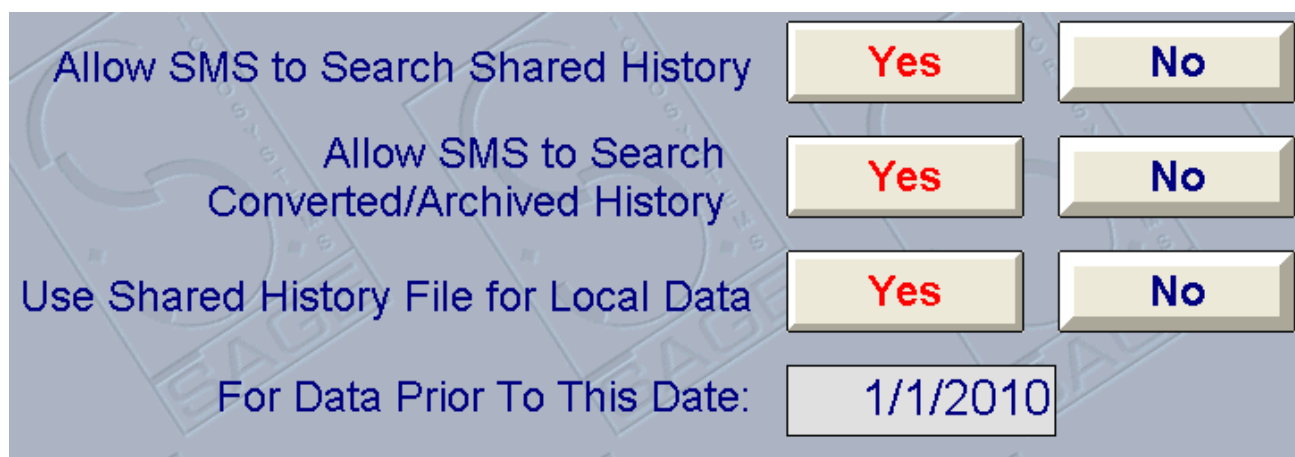Require Employee Selection From Popup List   **Yes**   **No**

To utilize this feature, from the Main Menu:

1. Touch #8 System Management

2. #2 General Setup

3. Touch 'Center Defaults'

4. Change from the default 'No', to 'Yes'

5. Touch 'OK' to save your changes

Allow SMS (sales gauges) to search for services performed at other locations within your group

The Service Maintenance Schedule (gauges screen) can now search for services performed at other locations (NexGen Professional with Customer/History Sharing Module Required)

Allow SMS to Search Shared History   **Yes**   **No**

Allow SMS to Search Converted/Archived History   **Yes**   **No**

Use Shared History File for Local Data   **Yes**   **No**

For Data Prior To This Date: **1/1/2010**

Allow SMS to Search Shared History:
> This allows QuickTouch to calculate the SMS Manufacturer's Service Mileage Recommendations based on shared history from your and other stores.

Allow SMS to Search Converted/Archived History:
> QuickTouch will also include service information from your previous system conversion or archived history in the calculations for the SMS.

Use Shared History File for Local Data For Date Prior to:
> Sage's conversion program includes converted information (from Sage DOS or non-Sage systems). Converted information from all of the stores in your group can be merged into the main shared database and viewed from any location. (NexGen Professional with Customer/History Sharing Module Required).

To utilize these features, from the Main Menu:

1. Touch #8 System Management

2. #2 General Setup

3. Touch 'Forward' to Page 2

4. Touch 'Owner Setup'

5. Touch 'Forward' to Page 4

6. Change all options you require

7. Touch 'OK' to save your changes

Edit Employee Clock Out Time at Day End

If an employee forgets to clock out or is staying late, you can perform day end and manually adjust clock out times

Allow Clock Out Time at Day End to be Set Manually   **Yes**   **No**

To utilize these features, from the Main Menu:

1. Touch #8 System Management

2. #2 General Setup

3. Touch 'Forward' to Page 2

4. Touch 'Owner Setup'

5. Touch 'Forward' to Page 2

6. Change from the default 'No', to 'Yes'

7. Touch 'OK' to save your changes

Sage Tech is clocked in. Clock him/her out?

Clock Out Time:
06:00PM

Yes   No
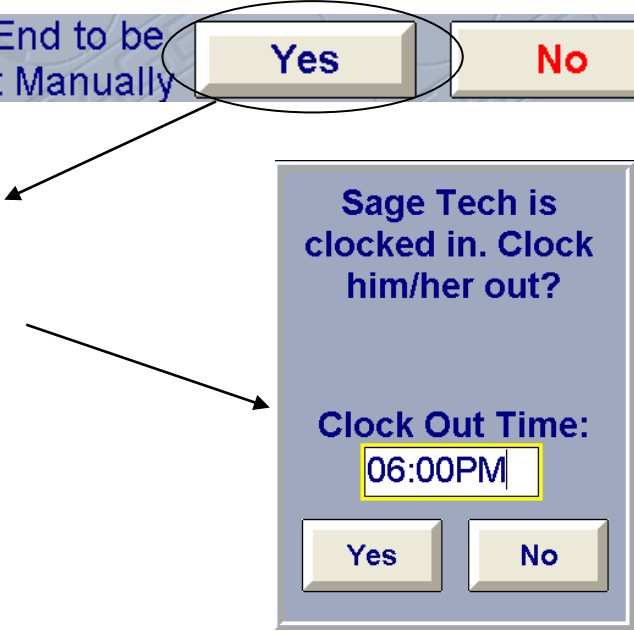
Change Which Employee Positions Show on Daily Stats Screens

Customize the positions you desire to display for more targeted statistics and simpler screen display

Show Which Positions on Daily Stats   **Manager**   **Upper Bay**   **Courtesy**   **Lower Bay**

To utilize these features, from the Main Menu:

1. Touch #8 System Management

2. #2 General Setup

3. Touch 'Forward to' Page 2

4. Touch 'Owner Setup'

5. Touch 'Forward' to Page 4

6. Select desired positions to be displayed

Employee Statistics

Print   **Hours**   **Daily Statistics**

Car Count   2
Average Ticket   89.47

Employee Name	# Cars	% Cars	Upper AVG	Tot AVG	+/-
Employee1	1	50 %	124.96	124.96	40 %
Sage Tech	1	50 %	53.98	53.98	-40 %

Change Number of Previous Days on your Inventory Reports

Customizes Inventory Worksheet & Inventory Listing High Detail Report (default was 90 days)

To utilize these features, from the Main Menu:

1. Touch #8 System Management

2. #2 General Setup

3. Touch 'Inventory Setup'

4. Touch 'Forward' to Page 2

5. Change from the default '90' to the number of prior days you would like to include in the units sold

6. Touch 'OK' to save your changes

Number of Days of Inventory Usage to Display on Reports   180

Stock #	DESCRIPTION	1	2	3	4	PHYS TOTAL	SYSTEM TOTAL	SELLING PRICE	MIN ON HAND UNITS	PREV 180DAY UNITS
		INVENTORY LEVELS PHYSICAL LOCATION								
	CABIN AIR FILTERS									
CAF1700	Cabin Air Filters	___	___	___	___	___		$29.99	0	0.00
CAF1701	Cabin Air Filters	___	___	___	___	___		$29.99	0	0.00
CAF1702	Cabin Air Filters	___	___	___	___	___		$29.99	0	2.00
CAF1703	Cabin Air Filters	___	___	___	___	___		$29.99	0	1.00
CAF1704	Cabin Air Filters	___	___	___	___	___		$29.99	0	0.00
CAF1705	Cabin Air Filters	___	___	___	___	___		$29.99	0	0.00
CAF1706	Cabin Air Filters	___	___	___	___	___		$29.99	0	3.00
CAF1707	Cabin Air Filters	___	___	___	___	___		$29.99	0	10.00

More Options on the Stock Sales Report

Now sort by Groups and your Fastest/Slowest Sellers

Stock Sales Report

Date Selection

All Dates   One Day   Select Range >>

Start [ ]
End [ ]

Single Day Selection [ ]

Include   All Vendors   Spec. Vendor [ ]

Include   All Groups   Spec. Group [ ]

Sort By   All Groups   Fastest Selling   Slowest Selling

Print Preview   Print

To utilize these features, from the Main Menu:

1. Touch #3 Inventory and Service Management

2. #8 Inventory Reporting

3. #6 Stock Sales Report

4. Select the desired sorting options

5. Touch 'Print' to print your report

'Next' Button added to Inventory Item Maintenance

Provides immediate move-to-next-item without returning to the item list allowing for faster editing in Inventory Item Maintenance

To utilize these features, from the Main Menu:

1. Touch #3 Inventory and Service Management

2. #1 Inventory Item Maintenance

3. Touch the inventory group your item is in

4. Touch the inventory item that needs changes

5. Make necessary changes to the item

6. Touch 'Next' to save and move to the next item OR touch 'OK' to save your changes as you normally would

Security Group Hierarchy

Set additional hierarchical access levels for Security Groups

Use Security Hierarchy in Security Groups   Yes   No

If enabled, users cannot view or modify employees or security groups that are in a Security Group with a higher security level (lower number) than they are. Security levels are set in Security Group Maintenance.

To utilize these features, from the Main Menu:

1. Touch #8 System Management

2. #2 General Setup Options

3. Touch Security Setup

4. Touch 'Yes', Under Security Hierarchy

Next, from the Main Menu:

1. Touch #4 Employee Management

2. #2 Security Group Maintenance

3. Touch the Security Group you want to change

4. Change the level of this Security Group

Note: **0 is the highest level, 1 has less access than 0, and so on.**

If a user is given access to Security Group Maintenance, they will be able to edit only Security levels equal-to or lower than their own

Security Group   Owner   Security Level   0

Description   Owner

Main Menu

In the example above, someone with Level 0 will be able to change all employees' information, including passwords. Level 1 will be able to change their own information (and password) as well as any employee's information with the same or a lower security level (higher number) than theirs. A Level 1 employee will not be allowed to change the information or password of a person with a Level 0, or create a new employee with a Level 0. Employees will not be allowed to raise their security level. Someone with a higher security level will be required to adjust any employees' security up to a higher level (lower number).

We suggest that the Owner be the only person with Security Level 0. Recommended set-up examples would be: Manager as Level 1, Assistant Manager as Level 2, Cashier as Level 3, Senior Technician as Level 4 and Technician as Level 5.

Enhanced Motor Information Systems' (Chek-Chart) Technical Databases

Includes additional technical databases including Oil Reset Light Procedures, transmission, cabin air, fuel filter and belt locations and installation procedures, and more (Requires QuickTouch Pro, additional fees apply)

Sage Microsystem

2008 NISSAN/DATSUN
ROGUE E-E 4-C 2.5L
(153) FI QR25DE

- Maint. Schedule
- Full Report
- Parts
- Chassis / Engine
- Recommendations
- Cautions
- Lubricants
- Capacities
- Oil Reset
- Tires/Torques
- Procedures

PROCEDURES

AUTOMATIC TRANSMISSION
th Unit CVT: The fluid level should be checked with the fluid temperature between 122° -176° F.
Shift the transmission throughout the entire shift range.
Pull out the fluid level gauge from the charging pipe after pressing the tab on the fluid level gauge to release the lock.
Insert the fluid level gauge rotating 180° from the originally installed position, then push the level gauge until it meets the top end of the charging pipe.
Check the fluid level in park and add fluid as needed.
Reinstall the fluid level gauge, and rotate it to the original position until securely locked.

Click to enlarge image

CABIN AIR FILTER
Remove instrument driver's side lower cover mounting screw, Fig. 1.
Pull back instrument driver's side lower cover.
Detach the DLC (Data Link Connector) from the driver's side lower cover.
Detach the hood release cable from the driver's side lower cover.
Detach the harness clip and remove the driver's side lower cover.
Disconnect accelerator pedal position sensor electrical connector, Fig. 2.
Remove the accelerator pedal retaining nuts.

Page 1 of 3

Installation Procedures Including:

- Automatic Transmission
- Manual Transmission
- Cabin Air Filters
- Fuel Filters

Detailed Oil Light Reset Procedures:

Walks your technicians through in-depth instructions on how to reset oil lights for many customers' vehicles

Graphics for Procedures such as:

- Automatic Transmission
- Manual Transmission
- Cabin Air Filters
- Fuel Filters
- Serpentine Belts

*** Please See the QuickTouch Pro documents for more information ***

Inventory Transfer (multi-store operations)

Allow your shops to transfer and track inventory from one store location to another

To utilize these features, from the Main Menu:

1. Touch #3 Inventory and Service Management

2. #6 Inventory Functions

3. #3 Transfer Inventory

4. Enter the store location where inventory will be transferred to

5. Enter which inventory is being transferred

6. Then touch 'OK' to save your changes, then take the printed paperwork with you to the store receiving the transferred inventory

Send To:	**1000**	→
Enter Stock Number to Transfer:	**AF4**	→

Stock Number	Description	Item Group	Carton Qty	On Hand
AF4	Air Filter 3	Air Filter	1	1.00

Units to Transfer: [ ]   **Cartons to Transfer:** [ ]

STOCK #	Description	ITEM GROUP	ONHAND	# SENT
15439	Cabin Air Filter Replacer	Cabin Air Filters	7.00	3.00
15389	Cabin Air Filter Replacer	Cabin Air Filters	3.00	2.00
15388	Cabin Air Filter Replacer	Cabin Air Filters	4.00	4.00

Updated Reports

Summary QuickTouch reports were updated to include the transferred inventory amounts, similar to the adjustment and restocking amounts already present in these reports

Daily Sales Summary

Vital Statistics Report

Inventory Analysis

STARTING VALUATION	11,086.164
ADJUSTED	0.000
RESTOCKED	0.000
TRANSFERRED	-26.470
COST OF GOODS SOLD	0.000
ENDING VALUATION	11,059.694

INVENTORY INFO   RESTOCKED: 0.00   ADJUSTED: 0.00   TRANSFERRED: -26.47   ORDERED: 0   OUT. PURCHASES: 0.00
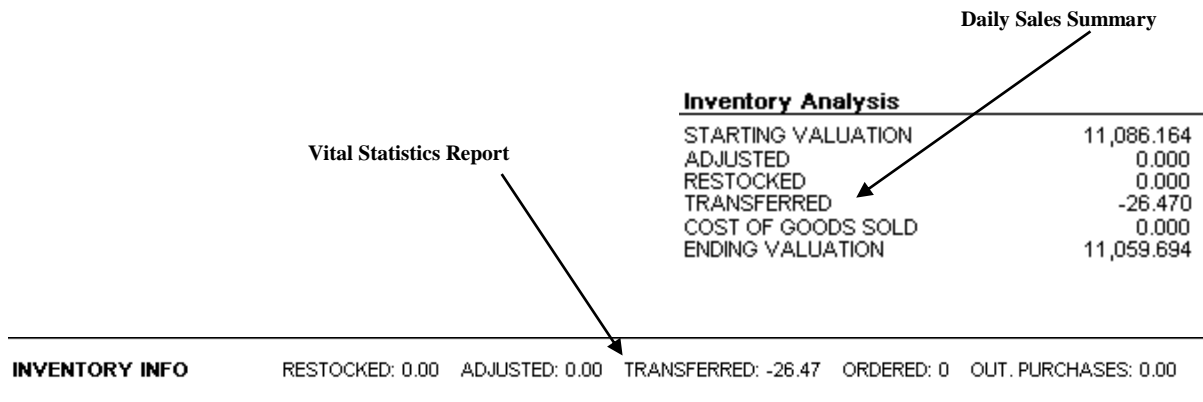
Grouping Added to Daily Statistics Screen

Breaks down grouping codes for each service to show you what each employee is selling

Service Name	# Svc	% Svc	Man	Crtsy	Upper	Lower	Tot
Check Tire Pressure	1	100	0	0	0	1	0
Full Service Oil Change	4	100	0	0	0	4	223.01
Bulk	1	100	0	0	0	1	31.49
High Mileage	1	100	0	0	0	1	35.49
Syn Blend	2	100	0	0	0	2	156.03

To view this feature, from the Main Menu:

1. Touch #1 Cash Register Mode

2. #2 Daily Statistics

3. Touch 'Emp' to view your employees' individual statistics

Added Non Salaried Labor Hours to Daily Statistics

Invoice Statistics Summary	
Average Ticket (Invoices)	223.01
Average Time	31.00 min
Non Salaried Labor Hours	13.0
Non Salaried Labor Hours per Vehicle	13.00
Labor Cost %	66.82%
Labor per Vehicle	149.03
Parts Cost %	33.93%
Parts per Vehicle	75.67

Added both Non-Salaried Labor Hours and Salaried Labor Hours to the Daily Sales Summary Report

Labor Analysis

TOTAL SALARIED HOURS	8.00
TOTAL NON SALARIED HOURS	13.00

Coupon/Discount Name and Description

Allows more functionality with your coupons and discounts

To utilize these features, from the Main Menu:

1. Touch #8 System Management

2. #1 Cash Register Maintenance

3. #1 for Coupon Maintenance, #2 for Discount Maintenance

Coupon Name: Is the naming convention of your choice that you and your employees will see. It could be a code or short description. This will print on your reports and appear on the cash-out screen.

Coupon Description: Is what your customer will see. So giving detailed information is best. This will print on the customer's invoice.

The example above shows that the name R005, is what the employees call the '$5 Reminder Card'. The coupon's description will be printed on the customer's invoice. It will show them that a 'Reminder Card $5.00' coupon was used.

Unique Coupon Numbers for Specific Coupons

Allows specific coupons to be pre-printed with unique numbers and then force the employees to enter the coupon number at cash-out. Each coupon number will only be allowed to be used once. This adds a powerful additional level of coupon tracking.

To utilize these features, from the Main Menu:

1. Touch #8 System Management

2. #1 Cash Register Maintenance

3. #1 for Coupon Maintenance

4. Touch 'Forward' to Page 2

Fleet Custom % Discount

Allows one-time setup of fleet-wide discounts on all services and parts

To utilize these features, from the Main Menu:

1. Touch #5 Fleet Management

2. #1 Fleet Account Maintenance

3. Touch the Fleet Account you would like to change

4. Touch 'Forward' to Page 3

5. Touch the settings desired
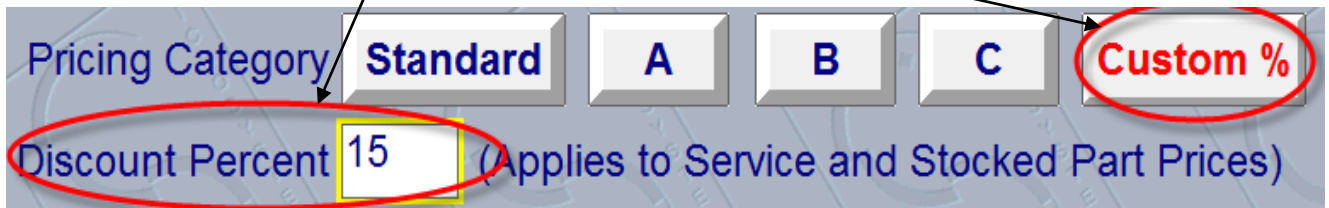
Show Fleet Discounts on Invoice

Adds flexibility to the fleet customer's invoice detail allowing choices to print or not print the fleet discounts on the invoice, and if printed, either per service or one time for the total invoice

To utilize this feature, from the Main Menu:

1. Touch #8 System Management

2. #2 General Setup

3. Touch 'Invoice Setup'

4. Touch 'Forward' to Page 2

5. Change from the default, 'Don't Show" to Show on 'Total Only' or 'Per Service'

6. Touch 'OK' to save your changes
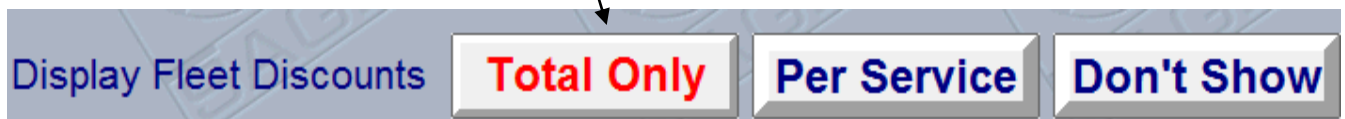
Note: This feature will only show Fleet Discounts, not Fleet Mark-Ups

Customized Sticker Mileage Interval

Options have been added to allow customized mileage intervals that are printed on the sticker and invoice. Choices include Default (current system-wide setting), Oil Type installed, Manufacturer's Recommendation or a Custom Interval

To utilize these features, from the Main Menu:

1. Touch #8 System Management

2. #2 General Setup Options

3. Touch Sticker Setup

4. Touch 'Forward', to Page 2

5. Touch the settings you desire, and then 'OK'

Next, setup Interval Override for each oil. From the Main Menu:

1. Touch #3 Inventory and Service Management

2. #1 Inventory Item Maintenance

3. Touch your Oil group and select an Oil

4. Touch 'Forward' to page 3

5. Type in the Months and Mileage Interval Override for this oil

6. Touch OK to save changes

Default Sticker Mileage Interval	3000
Default Sticker Month Interval	3

Allow Sticker Date/Mileage Overrides	Yes	No
Add Oil Type Override	Yes	No
Add Chek-Chart Specs Override	Yes	No
Add Custom Override	Yes	No
Preferred Sticker Interval	Default / Specs	Oil Type / Custom

Inventory Oil Item Maintenance

Sticker Interval Override	Months	Mileage:

**NEW! If you change your oil type or mileage interval, the system will automatically ask if you want to reprint the sticker with the new information.

Services

History **Specs**

Mileage

Full Service High Mileage
C530HM - CASTROL 5W30 HI-MILEAGE

Touch To Remove

Sticker	Default	Oil Type	Specs	Custom	
	3 Months	✓ 5 Months	3 Months	Months	
	3000 Miles	5000 Miles	3750 Miles	Miles	

Check-In Screen

Plate PA-TEST   **Mileage**   **Previous Mileage:** **N/A**

Check-Out Screen

Sticker	Default	Oil Type	Specs	Custom	
	3 Months	✓ 5 Months	3 Months	Months	
	3000 Miles	5000 Miles	3750 Miles	Miles	

CarFax Quick VIN Integration—Free 60 Day QuickTouch Pro Trial! (Broadband Internet Required, U.S. Plates, only)

QuickTouch is now interfaced to CarFax. Enter the customer's license plate number and the VIN will be automatically returned from CarFax. No more worries about incorrect year, make, model or engine - you'll have accurate information every time!

Getting Accurate Information, Every Time:

The license plate is entered and the VIN is returned from CarFax. It is decoded including: VIN, Year, Make, Model, and Engine. These are the keys to activate the Motor (Chek-Chart) technical database information for the service technicians to use.

Please Wait...
Checking CARFAX

Vehicle Year	2009 →	Chek-Chart Active
Make	DODGE	
Model	JOURNEY	
Engine	E-U 6-C 3.5L (213) FI [V]	
VIN	3D4GH67VX9T588696	

Update Inaccurate Information:

When you check in an existing customer, QuickTouch will go to CarFax to get the VIN and verify that the vehicle's information on file is accurate. If it is incorrect, QuickTouch will notify the operator and allow them to correct the stored information.

For More Information about CarFax Quick VIN, QuickTouch Pro and the additional Guardian fees, contact Sage Customer Service at 800.724.7400

License Plate	PA SAGE	Fleet Account Add Extended Customer Information →
Customer Name	Sage	
Address	18 N Village Ave	
Zip Code	19341 City EXTON St PA	
Home Phone	800-	
Vehicle Year		
Make	NISS	
Model	MAX	
Engine	E-2	
VIN	JN8	
Email (Opt In)		

Existing Vehicle Does Not Match CARFAX

Existing	CARFAX
2008	2008
NISSAN/DATSUN	NISSAN/DATSUN
MAXIMA	ROGUE
E-2 6-C 3.5L (214) FI VQ35DE	E-E 4-C 2.5L (153) FI QR25DE
Use Existing	Use CARFAX

Version 6.6.2

Sage Microsystems is pleased to announce the release of our annual QuickTouch program update, Version 6.6.2. This update includes lots of new features, many of which came from you, our customers, as requests to help you better run your business.

Please follow the attached steps to install your new version of QuickTouch. This should take about 10-30 minutes for each computer. Once you have started, you must run the update on all of your computers before using ANY of them.

And finally, there are several setup changes you will need to make in QuickTouch, after the updates, to begin to take advantage of the new features.

Featured Updates
- VIN Scan Decoding- QuickTouch now supports the scanning and decoding of your customers' vehicle identification number (VIN) to correctly identify the year, make, model, and engine information. This can improve the speed and accuracy of the check-in process.

- Multi-Till- In 6.6.2 you can now run cash drawers at any number of work stations and cash out two or more customers at the same time. Multi-Till can also be used to track the tills for individual employee shifts.

- New and Enhanced Reports- Over 8 new reports have been added to QuickTouch. In addition, many enhancements have been made to our existing reports to provide you even better information to help you run your shop.

NOTE: All new reports will have access denied by default for all employees.
To allow access, you will need to change the access from denied (red) to allowed (green) for every employee group. To do this, go to:
    4. Employee Management
    2. Security Group Setup and change each group to allow access to those
    Reports they are allowed to see.

VIN Scan Decoding
VIN Scanning allows easy customer check-in and more accurate vehicle identification

What is it? It's a barcode scanner (pictured below) that can scan the VIN barcode on your customers' vehicles. QuickTouch decodes the VIN to automatically insert the correct vehicle Year, Make, Model, and Engine into the system. VIN Scanning streamlines your techs' process of specifying the details of each vehicle. When you scan a VIN from the bay screen, it automatically brings up repeat customers. If it is a new customer, it will automatically fill in the Chek-chart vehicle information.

How much is it ? There are three charges:
1.) A one-time database purchase fee of $449,
2.) a monthly Guardian fee of $39/month (if you are currently a PM subscriber, this fee is discounted to $19/month), and
3.) the scanner itself. There are a few price options of scanners (wired, wireless, etc.) to choose from.
Please call our sales department for more information.

Why is there a monthly charge? This if for the actual vehicle decoding database and software. Sage buys this database of information from Motor, just like we do for the Chek-Chart specifications.

How do I get one? First, you must be on the Guardian Program and must have the latest versions of QuickTouch (V6.6.2) and Chek-Chart. Then just give us a call and ask for our sales department. Below is an image of checking in a new customer.

In addition to scanning VIN's with your scanner, you can scan barcodes for inventory management and customer point-of-sale coupons/discounts. Enabling this feature will allow you to more efficiently scan and keep track of inventory.

To activate inventory barcoding:
1. Go to #8, System Setup
2. #2, General Setup
3. Page forward
4. Touch Owner Setup
5. Page forward to Page 3
6. Touch 'Yes' to Coupon/Discount and/or Inventory Scanning.

Multi-Till (Multi-Cash Drawer)
Allows multiple cashier stations or multiple shifts, making it easier to keep track of your money

What is it? QuickTouch now allows you to have more than one computer with a cash drawer. For example, you can have two bays which cash out customers simultaneously or if you have two cashier shifts, each cashier will verify their own drawer totals. This keeps each employee that handles cash responsible for the money they process.

How to turn this on?
1. From the Main Menu, go to #8, System Management
2. Touch #2, General Setup
3. Page Forward to Page 2
4. Touch Owner Setup
5. Page Forward to Page 2
6. Change Multiple Till to 'Yes'

How it works? Before a cashier can operate a cash drawer on the system, they first must open their till. To open a till:
1. Go to #2, Period Ending Processing
2. Touch #1, Till Management
3. Touch #1 Open Till and proceed with the opening.
Customers can be processed normally until you are ready to close the till.

To close the till, from Main Menu, go to #2, Period Ending Processing, #1, Till Management, #2, Close Till. The End-of-Day Process stays the same except that each cashier's drawer total must be verified individually.

New and Enhanced Reports
There are many new and enhanced reports to give you better and more efficient ways of looking at your store's information

New Reports
Till Report - If you use multiple tills, you can print out the Till–End for each cashier, very similar to Day-End Journal

Pay In/Out - Date range for all pay-ins and pay-outs

Daily Sales Summary – Abbreviated summary of both the Daily Sales Report and the Vital Statistics Report for any date

Inventory Reconciliation (Audit) Report– Similar to Inventory Snapshot with date range added and shows all restocking and adjustments

Time of Day by Week Day – Now allows date range. Shows comparison of all days against same weekdays in the specified date range

Employee Audit Report - Records all adjustments made to any employee's clock in or out times

Bi-Weekly Timesheet Summary – Employee Time Sheet now allows a 'Bi-Weekly' format

Employee Productivity – Employee specific statistics (car count, ticket average, etc.) for a select date range and comparison with other employees' statistics

<u>Enhanced Reports</u>
Vital Stats- Added the total number of Bay Restores and Bay Deletes. Added Inventory Grouping Codes

Weekly Sales– Added Inventory Grouping Codes

Daily Sales– Added Inventory Grouping Codes

Item List - Option to print out negative inventory

Exceptions Report - Added payment method to Restores, Voids, and Refunds. Resorted the report in chronological order for clarity. Added time clock adjustments

Coupon and Discount – Added breakdown by number of customers in addition to number of invoices for first vs. repeat customers

First vs. Repeat – Added breakdown by number of customers in addition to number of invoices

Inventory Restocking – Added total cost at the bottom of the column.

Inventory Adjustments – Added total cost at the bottom of the column

Purchase Order – Added vendor address and contact information and ability to manually modify/add items

Employee Sales Tracking – Added ticket averages

Reactivate Employee
Reactivate an employee (and their code) that has been previously deleted

If an employee was deleted from the system and needs to be reactivated (for example, if they were re-hired), there is a new feature to turn them back on.

1. From Main Menu, go to #4, Employee Management
2. Touch #6, Reactivate Employee
3. Put a check mark next to each employee you would like to reactivate
4. Touch 'OK' and the employee will be reactivated

Duplex Printing (2-sided printing)
Now allows company disclaimers or overviews to print on the back of the invoice to eliminate pre-printed forms

You can now duplex or print on both sides of standard white laser paper for customer invoices. You will need a printer with the ability to duplex, such as the Lexmark E450dn, Lexmark E460dn, or HP CP1518ni. Please refer to the printer's user manual for duplexing setup instructions.

To print your warranty information on the back of your invoices from QuickTouch:
1. Create a .rtf document with the information you would like to print out
2. Put this file in the C:\ProgramFiles\QuickTouch\data folder
3. Go the QuickTouch Main Menu and touch #8, System Management
4. Touch #2, General Setup
5. Then touch Invoice Setup
6. Page Forward to Page 3
7. Touch 'Yes' to activate duplex printing
8. Touch the .rtf file you copied to the data folder
9. Touch 'OK' to save the changes

Recommended Oil and Comment Pop-Up at Check-In
A pop-up during check-in to show you what the previous comments and recommended oils are for the vehicle

Enabling this setting will create a pop-up when you check in a customer, showing the manufacturer's recommended oil type, capacity, cautions, and any comments you may have entered during the previous visit. This allows you to select the correct oil during check-in. It is also a good way to follow up on service recommendations.

To enable this setting:
1. From the Main Menu, go to #8, System Management
2. Touch #2, General Setup
3. Page Forward to Page 2
4. Touch Owner Setup
5. Page Forward to Page 2
6. Touch Yes at Show Recommendations at Check In prompt
7. Touch which forms you'd like to show recommended oil for.

Shared AR (Multi-Store Fleet Processing)
Now restricted to only those functions that are allowed with Shared A/R

If you share accounts receivable for your fleet accounts between stores, your employees will now be restricted from the Fleet Menus in QuickTouch. Maintenance for the fleet accounts will now only be allowed in NexGen.

Enhanced Service Maintenance Schedule (Gauges)
A 'Fixed Pricing' feature has been added to the SMS allowing you to specify the standard price for a service

More control has been added to the Service Maintenance Schedule (gauges) screen and printed sales sheet. You can have the service recommendations use the calculated price from the service or you can now set them to a fixed price or add a custom message to that service.

To change to a fixed service price on the Service Maintenance Schedule:
1. From Main Menu, go to #8, System Management
2. Touch #3, System Utilities
3. Then #7, Chek-Chart/PM Maintenance
4. Page Down to the recommendation you would like to change and touch the button on the right
5. Touch 'Fixed Price' or 'custom message' and touch the right arrow
6. Touch 'OK' to save your changes

Updated!
Air Filter and Cabin Air Filter will now print the selling price associated with that part for that vehicle.

Updated!
If there is no mileage recommendation in the vehicle specifications database, QuickTouch will now display an orange question mark instead of a green one. This will allow you to discuss it with the customer as a potential service.

Updated!
Disclaimer added to inform customers that this service may not apply to their vehicle. For example, their vehicle might be a 2WD model that has no front differential. The same vehicle in 4WD model would need that service.

Updated!
The Chek-Chart database has been re-structured to increase the speed of the Service Maintenance Schedule and Preventive Maintenance print-outs.

Editable Check List
Add comments to specific items in the service checklists and print them on customer invoices

Every checklist item can now have a service comment (memo) added to the customer's invoice during check-out. Simply touch the checklist item name and the memo text box will open. Then type in the service comment.

In the example below, Air Filter was touched and a comment was typed in. It then prints on the invoice for the customer to see and is permanently stored in their service history. (Some Sage invoice types do not support this feature).

Four Digit Employee Codes
Employee codes have been expanded to allow four digits

Add Items to Purchase Order
Allow non-stock parts and supplies to be added to a Purchase Order

When creating a purchase order, there is now added space at the bottom to enter in parts that are not stock items but that you would like to include on the order from that vendor. For example, shop supplies, grease, etc. You can now type in any part number or general description into that space on the order. When you receive the order and restock, you can easily add it into your

---

Lube 2 / Split Screen Format

For those who use the 'Lube 2' format on the bay screen, the invoice total has been added to the split screen for each customer's invoice. The Lube 2 screen allows you to view the work order on screen rather than printing it. To enable the Lube 2 bay screen format:

1. Go to #8, System Management
2. Touch #2, General Setup
3. Page Forward to Page 2
4. Touch Owner Setup
5. Under Bay Screen Style, change from Lube to Lube 2
6. Touch 'OK' to save the change.

Thank You Cards to New Customers
An option has been added to reminder card setup to send to 'new' customers only

You can now specify that you would like to send thank you cards to first-time customers only. To activate this feature:

1. Go to #8, System Management
2. Touch #2, General Setup
3. Touch Reminder Setup
4. Touch 'Yes' at the 'New Customers Only' prompt.

When you print your thank you cards, the system will now ask you if you want to print them for all or new customers only.

More Sticker Types Added
More static windshield sticker types have been added to the currently supported
sticker type list in QuickTouch. To choose a different sticker style:

1. Go to #8, System Management
2. Then #2, General Setup
3. Touch Sticker Setup
4. Bottom of screen will display all of the sticker types that are available.
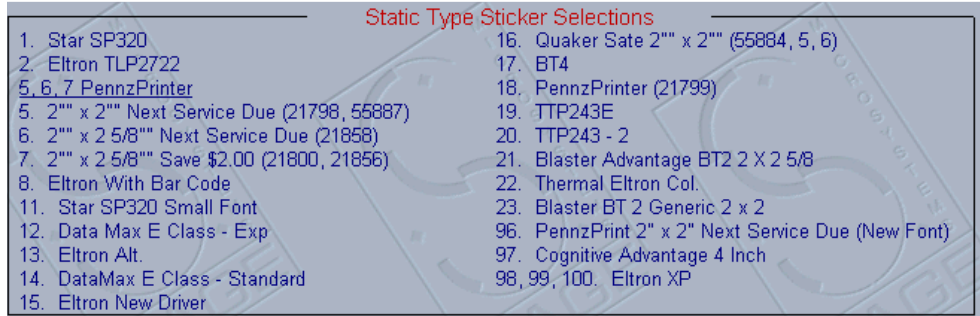
Clear Employees for Invoice
This option clears employee names for every invoice

If you enable this option, during cash-out the names of the employees who are servicing
the vehicle will need to be entered with every transaction. To activate the 'clear employee
names' option:

1. Go to #8, System Management
2. Then #2, General Setup
3. Touch Center Defaults
4. Touch 'Yes' at the 'Clear Employee Selection' prompt
5. Touch 'OK' to save the change.
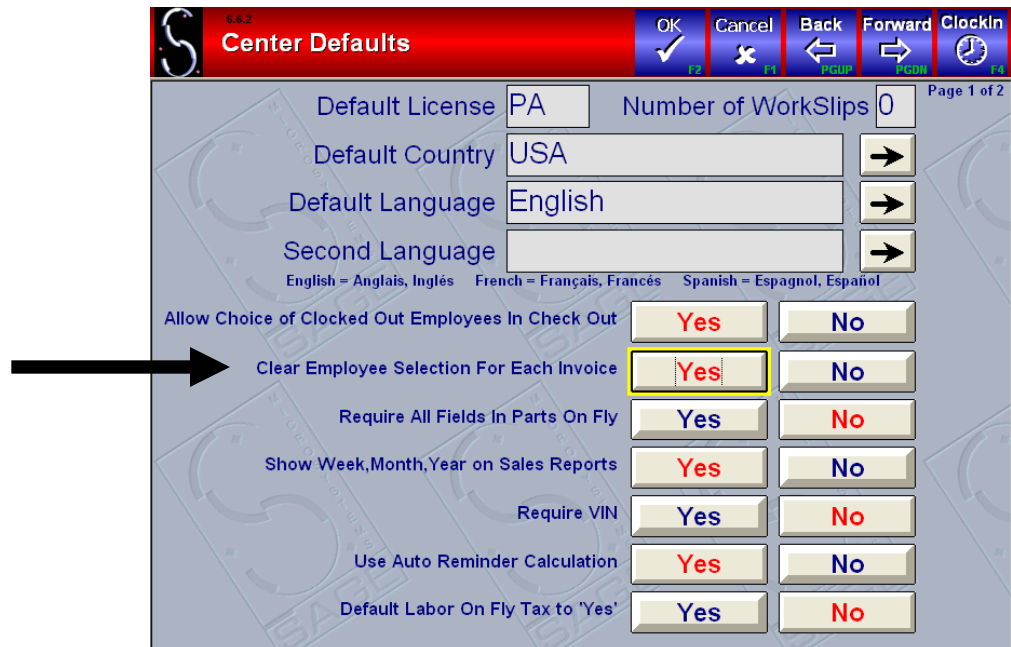
Employee Security Update
Security has been added to the Employee Time-Clock functions; Code and Password can be required

By turning on this new feature, all employees will be required to enter their code and password to clock in and clock out of QuickTouch. To enable this new security feature:

      1. Go to #8, System Management
      2. Then #2, General Setup
      3. Touch Security Setup
      4. Touch 'Yes' at the 'Before Clock In and Clock Out' prompt
      5. Touch 'OK' to save the change.

For maximum system security, answer 'Yes' to all the options on this page.

Print Multiple Work Orders

Many states require an estimate after check-in in addition to the standard work order. If your business needs additional printouts during check-in, you can now choose which you would like to print. To specify which forms are required:

      1. Go to #8, System Management
      2. #2, General Setup
      3. Work Order Setup
      4. Under 'Second' or 'Third' work order type, touch the right arrow to choose the different printouts you require
      5. After selecting the correct forms, touch 'OK' to save your changes.

Note: You may have to print a few different types to find the ones you need.

Grouping Code
This report feature allows you to combine groups of similar inventory items to improve service detail

For example, you can now sub-group all of your oils that are part of the OIL item group that are used for a Full Service. By assigning a Grouping Code name to similar items, you can see how many Bulk Oils you sold in comparison to Semi and Synthetic Oils, or any other grouping name you wish to add for more detail. If there is no Grouping Code specified, there will not be any additional detail on the reports. To start using this feature:

> 1. Go to #3, Inventory & Service Management
> 2. #1, Item Maintenance
> 3. Touch the Item Group you would like to add codes to
> 4. Touch an item you want included and type in the Grouping Name you would like to use for the reports.

 Repeat for all items you would like included. You can create as many grouping codes as you'd like.

SERVICE SALES	SATURDAY				WEEK TO DATE				MONTH TO DATE			
SERVICES	# OF SVC	% OF SVC	SALES AMOUNT	% OF SALE	# OF SVC	% OF SVC	SALES AMOUNT	% OF SALE	# OF SVC	% OF SVC	SALES AMOUNT	% OF SALE
ADDITIVES	0	0	0.00	0	7	5	133.93	2	10	2	172.90	1
AIR FILTER	1	2	13.99	1	13	9	245.87	4	49	10	891.51	4
DRAIN AND FILL	0	0	0.00	0	1	1	42.99	1	3	1	128.97	1
FRONT DIFF SVC	0	0	0.00	0	0	0	0.00	0	2	0	66.98	0
LIGHTS	1	2	4.99	0	4	3	47.96	1	5	1	52.95	0
FULL SERVICE	41	100	1640.34	98	142	97	5808.53	88	477	97	19475.62	87
BULK	23	56	822.52	49	80	54	2,808.45	42	266	54	9,350.09	42
SEMI	2	5	109.98	7	3	2	187.47	3	5	1	297.45	1
SYNTHETIC	16	39	707.84	42	5	3	286.35	4	16	3	901.24	4
UNGROUPED	0	0	0.00	0	54	37	2,526.26	38	190	39	8,926.84	40
REAR DIFF SVC	0	0	0.00	0	0	0	0.00	0	2	0	106.98	0
TIRE ROTATION	0	0	0.00	0	0	0	0.00	0	8	2	169.92	1
TRANSFER CASE	0	0	0.00	0	0	0	0.00	0	1	0	36.99	0
WIPER BLADES	2	5	21.98	1	23	16	338.74	5	86	18	1265.97	6

Disable Parts and Labor Buttons
Disable these buttons on the bay screen

Changing this setting will disable the Parts and/or Labor buttons on the blue service entry screen during check-out. To disable these buttons, call Sage Technical Support at (800) 724-7400.

Inventory Item Cost Decimal Places
Allows you to increase the number of decimal places on your inventory items' cost from 2 to 4

With this option you can change the number of decimal places that your cost uses from 2 to 4 for greater accuracy. Making a change here will change the number of decimal places on all inventory items. To change this value:

1. Go to #8, System Management
2. #2, General Setup
3. Touch Inventory Setup
4. Type a number from 2 to 4. The system default is 3.
5. Touch 'OK' to save the changes.

Invoice Logo Image Size
Allows you to change the size of your company logo image that prints on your invoice

With this option you can change the size of the logo image that prints on your invoice. To change this sizing:
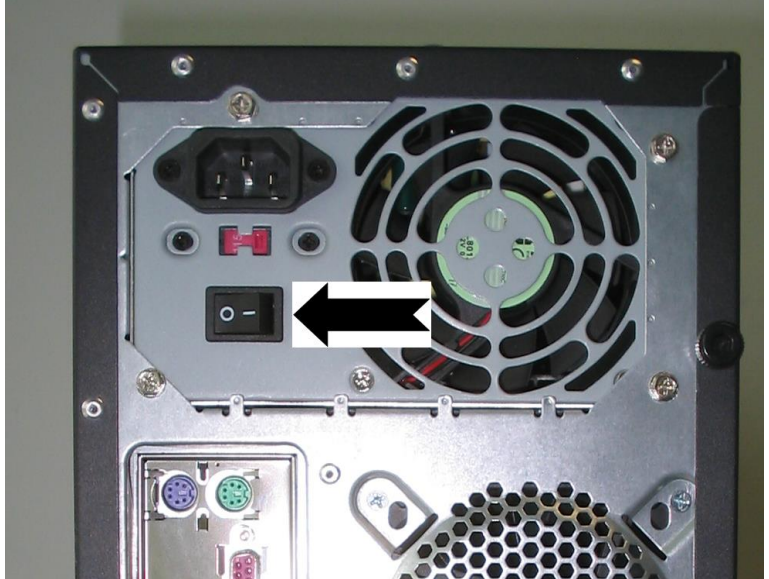
1. Go to #8, System Management
2. #2, General Setup
3. Touch Invoice Setup
4. Go to Page 2 or 3 depending on invoice type
5. Change the sizing setting,
6. Touch 'OK' to save the changes

Installing Replacement Hardware

The following instructions will help you install replacement hardware into your computer. If you have any trouble with the installations or have questions, please call Sage Technical Support at 800.724.7400.

CD/DVD Writer Drive Replacement

This procedure will take approximately 10 minutes.
The only tool you will need is a Phillips screwdriver.

1	Make sure that the computer and the master power switch in the back are turned off. There should be absolutely no sounds or lights coming from the computer.	
2	Pull the faceplate off from the front of the computer by first pulling the bottom out, and then the top. There is a handhold on the bottom of the faceplate.	

3	Unscrew the two thumb screws from the back of the computer.	
4	Pull the side of the computer straight back. You will feel it disengage.	
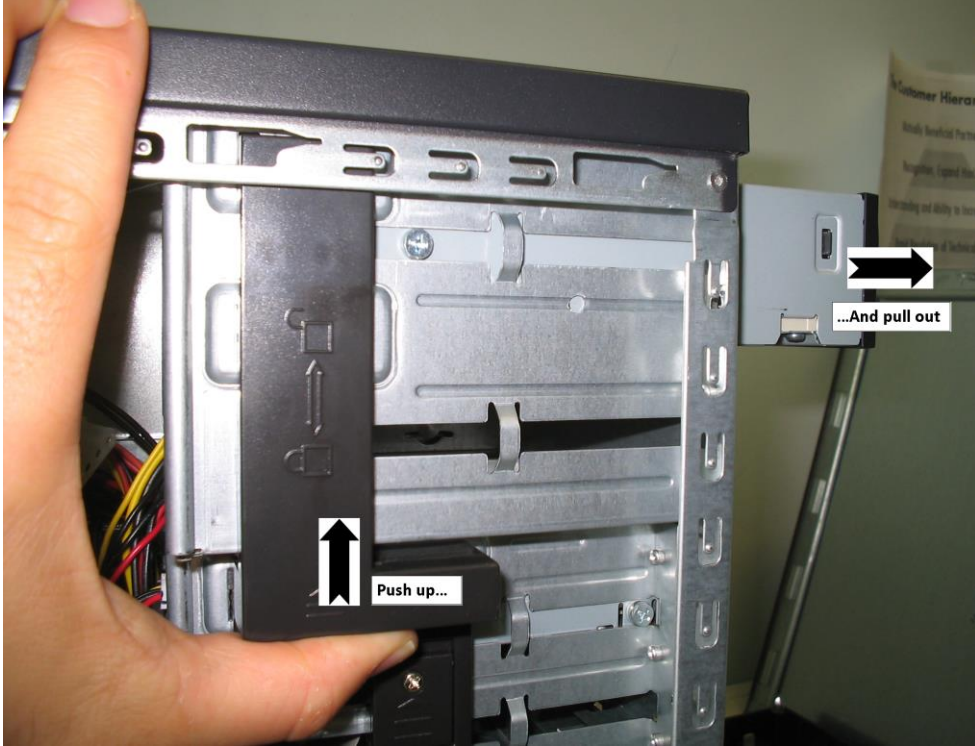
5	You are now looking at the inside of the computer. The CD/DVD drive will be all the way at the top.	
6	Unplug both cables from the back of the CD drive. One will be a gray ribbon cable; the other will be a multicolored power cable. They will both pull straight out of the back of the drive. You want to be gentle but firm when pulling on the cables – they'll feel stuck but will not require a lot of force.	 Pull both cables straight back
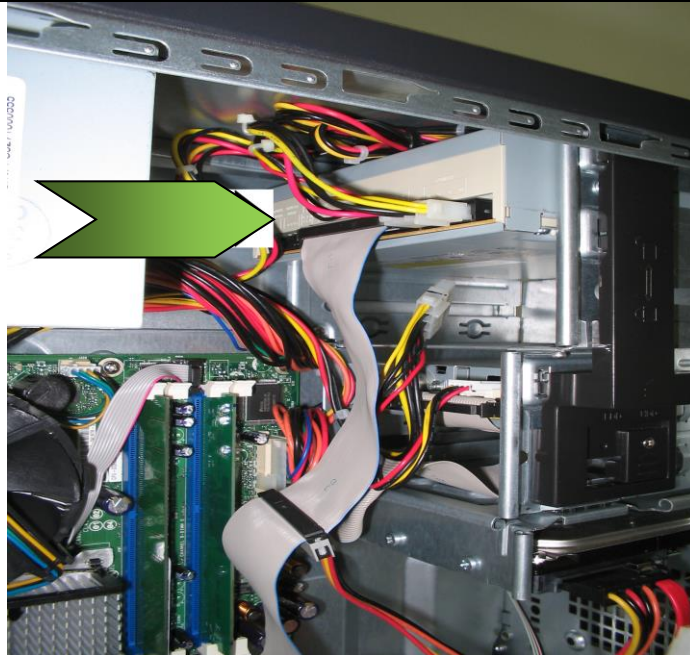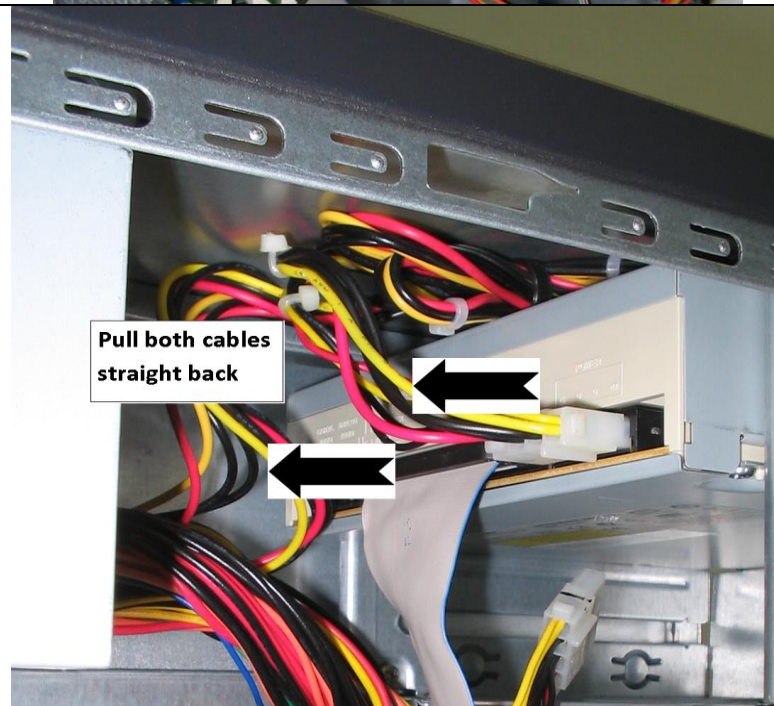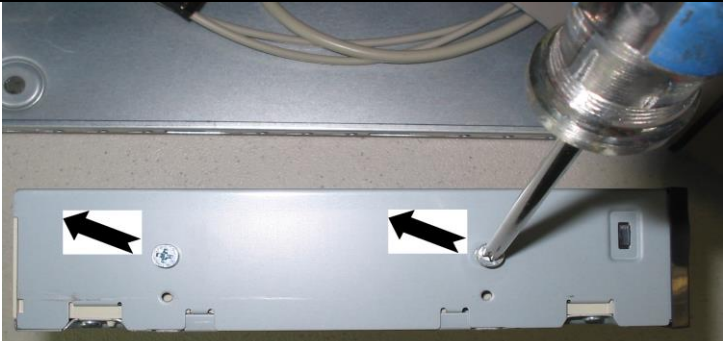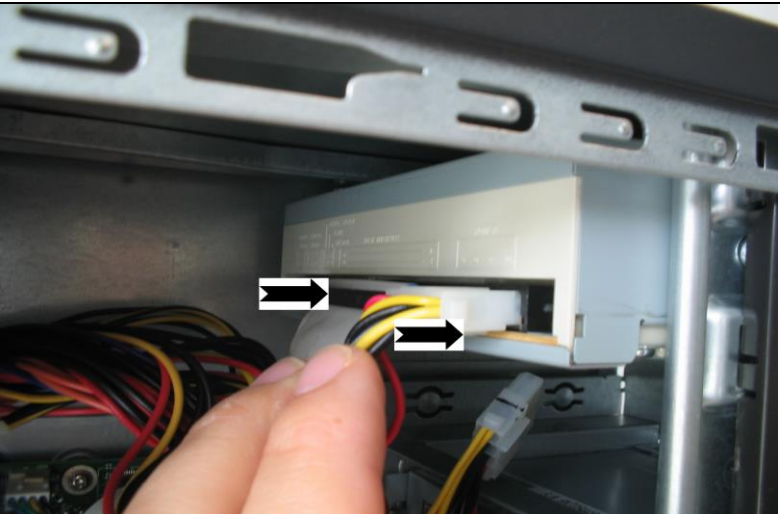
7	Push up on the locking mechanism with one hand, and pull the drive out with your other hand. It will slide right out.	

8	Unscrew the two screws from each side of the old drive…	
9	…And screw them into the same (top) holes of the new drive.	

1 0	Push the new drive back into the computer. You will hear it snap into place.	
1 1	Push both cables straight into the back of the new drive.	
1 2	Replace the side of the computer. It will snap into grooves on the top and bottom, and then slide forward and lock into place on the front.	

1 3	Replace the two thumb screws in the back of the computer.	
1 4	Replace the faceplate by pushing in the top first and then the bottom.	

1 5	Turn the master power switch back on.	
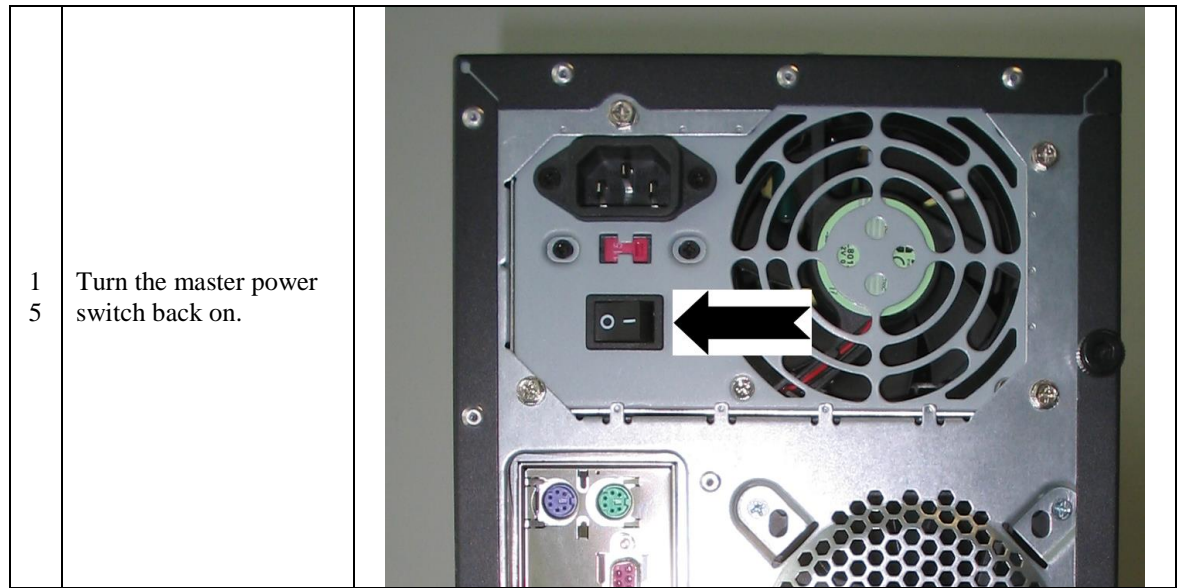
56K PCI Faxmodem Replacement

ATTENTION: Your computer system must be running a version of Microsoft Windows to properly use this modem.

Introduction

Your modem package includes:
- 56K PCI Faxmodem
- Telephone cable
- USRobotics Installation CD-ROM

Modem

Telephone cable

Installation CD-ROM

System Requirements to use modem:
- Windows Vista, Windows XP, 2000, Me, 98, or 95 OSR2
- CD-ROM Drive
- Available PCI Slot
- 56K Compatible analogue telephone line

NOTE: If you are unsure if your phone line is analogue or digital, consult your telephone service provider or building facilities department.

CAUTION: Use an analogue phone line only. The modem will be damaged if used with a digital phone line.

Tools Needed for Installation:
- Phillips Head screw driver

Before you install the modem

NOTE: You will need to uninstall all other modems in your computer before installing your 56K PCI modem. For instructions, refer to the documentation provided with the previous modem.

1. Shut down your computer.
2. Unplug all power cords connected to the computer.

DANGER: Make sure your computer and all other electrical devices connected to the computer are powered off and unplugged to avoid the risk of electric shock.

Installing the modem

1. Using a screw driver, remove the computer's case.
2. Locate the available PCI slot you wish to use to install the modem.

PCI Slots

3. Using a screw driver, remove the screw and metal filler bracket from the PCI slot.
4. Holding on to the edges of the modem, remove it from the anti-static bag.

NOTE: The modem may be damaged if contacts on the connector or corners are touched.

5. Locate the connector you wish to use for the modem.
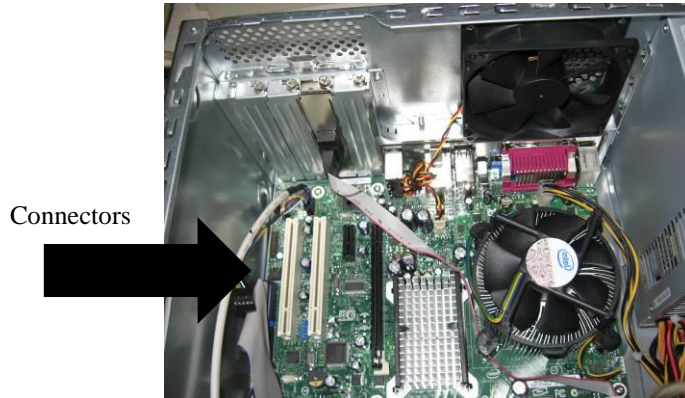
Connectors

6. Insert the modem into the connector, while sliding the metal bracket into the PCI slot.
7. Press down firmly to ensure the modem is securely seated in the connector.
8. Using the screw driver, secure the metal bracket into the PCI slot.
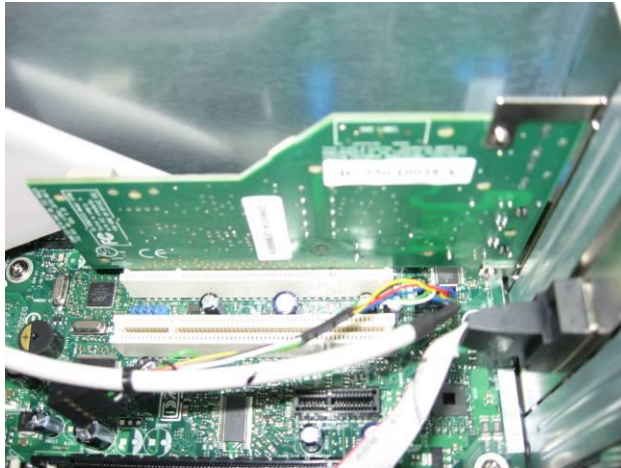
Installed modem

9. Slide computer case onto computer.
10. Secure case with screws.
11. Plug in computer power cords.
12. Turn on computer.

NOTE: Your computer should detect the modem once properly installed. A pop-up message will appear on screen, "New Hardware Found." If you do not see this message, turn off computer and repeat steps 6-12.

Connecting the Modem to an Analogue Phone Line

CAUTION: Use an analogue phone line only. The modem will be damaged if used with a digital phone line.

NOTE: On the back of your computer you will see two open jacks in the PCI slot you installed the modem into. One jack will feature an icon of a telephone; the other will feature an icon of a phone jack.

1. Locate the telephone cord included with the modem package.
2. Plug one end of the telephone cable into the left open jack on the back of your computer. (Left icon in above picture)
3. Plug the other end of the telephone cable into the wall jack of an analogue telephone line.

NOTE: If you wish to use the analogue telephone line while using your modem, you will need to connect your telephone to computer's open jack.

Installing your Modem's Software Drivers

NOTE: You will need to install the modem's software drivers for proper use. You must be logged onto your computer as an administrator to install the software drivers.

1. Locate the USRobotics Installation CD-ROM.
2. Log onto computer as an administrator.

NOTE: There are different installation instructions for the different versions of Microsoft Windows.

Windows Vista Users
1. When you see the "Found New Hardware" pop-up window, click **Locate and install driver software (recommended)**.
2. Click **Don't search online**, if prompted.
3. Insert the USRobotics Installation CD-ROM into your computer.
4. Follow the onscreen instructions.
5. Click **Install**, if prompted by Windows Security.
6. Click **Close** to complete the installation.

Windows XP Users
NOTE: Computers running Windows XP will automatically detect the installation of a modem and install a generic software driver. To properly use your 56K PCI Modem, you will need to update the software driver with the USRobotics software.

1. When you see the "Found New Hardware" pop-up window, select **No, not this time.**
2. Click **Next**.
3. Select **Install the software automatically**.
4. Click **Next**.
5. Follow the onscreen instructions.
6. Insert the USRobotics Installation CD-ROM into your computer.

NOTE: If the CD-ROM does not automatically run, you need to click **Windows Start > My Computer** and double click the CD Drive.

7. Select your preferred language.
8. Read the End User License Agreement.
9. Click Accept.
10. Click **Install Modem**.
11. Follow the onscreen instructions.

NOTE: If you see a Hardware Installation warning, click **Continue Anyway**.

12. Click **Finish** to complete the installation.

Windows 98 Users

1. When you see the "Add New Hardware" pop-up window, Insert the USRobotics CD-ROM into your computer.
2. In the pop-up window, click **Next**.
3. Select **Search for the best driver for your device (recommended)**.
4. Click **Next**.
5. Select **CD-ROM Drive**.
6. Click **Next**.
7. Click **Next** again to install the software driver.
8. Click **Finish** to complete the installation.

Congratulations. You have successfully installed your 56K PCI modem and software drivers. Please register your 56K PCI Faxmodem for Windows at www.usr.com/productreg/.

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