

## Quick Start Guide #1



### Table of Contents

Mission Statement .....	2
Expectations .....	3
Welcome .....	4
Let's Get Started .....	6
Explanation of Keyboard Functions and Terms .....	8
SwiftLink™ Demo Mode .....	9
POS/Service Tutorial .....	10

### APPENDIX

A. Installation Requirements .....	16
B. Network System Requirements .....	19
C. SwiftLink™ Flow chart .....	24
D. POS/Service Samples .....	31
E. General Ledger Account Numbers .....	41
F. Markup/Gross Margin .....	44
G. Column Price Margin Manager .....	47
H. How to Make a Windows® 95 Icon.....	50

*“Even if you’re on the right track,  
you’ll get run over if you just sit there.”*

*Will Rogers*

## **MISSION STATEMENT**

Our mission in life, is to create and deliver the **finest software possible** to the Retail and Service Industry. We will know and understand our customers and their needs, allowing us to not only meet, but **exceed** their **expectations**.

Jim Souers, President

*Excellence is never an accident...*

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*“Nothing in the world can take the place of persistence. Talent will not; nothing is more common than unsuccessful men with talent. Genius will not; unrewarded genius is almost a proverb. Education will not; the world is full of educated failures. Persistence and determination alone are omnipotent.”*


*Calvin Coolidge*

## **EXPECTATIONS**

Like anything new, the more time you dedicate to learning SwiftLink™, the sooner you will become proficient. On an average, you will learn the Retail package or the Service package within the first week. Each module thereafter will take less time as you become more familiar with the SwiftLink™ methodology.


**Welcome** to the SwiftLink™ family, and congratulations on your decision to automate your business with the Industry's Leading Computer Business Solution!

There is no hard bound paper manual included with you new SwiftLink™ package because...


- 1) SwiftLink™ moves at an extremely fast pace,
- 2) Tutorials are included to help you get started quickly,
- 3) SwiftLink™ includes a built-in “**Help Desk**”,
- 4) You can easily access the computerized documentation through the  **Help screens**,
- 5) Our toll free hotline...(800)794-3854 (800-SwiftLink™), is available from 8:00AM to 5:00PM Central Standard time, Monday through Friday.
- 6) It is essential that we all try to protect our environment.

SwiftLink™ is a very **dynamic** software product. As the needs of the retail and service industry change, so does SwiftLink™! With a rapidly changing software solution, a “hard bound” manual soon becomes outdated.

Tutorials are included to help you get started quickly. Whether you are a retailer or servicer or both, we provide you with easy to read guides (**tutorials**) to help you be productive in a short period of time. In fact after you load your SwiftLink™ software, you will see how easy it is to produce a Point of Sale Invoice for either appliances or appliance parts, and if you do service, you will see that it is a “snap” to print a service ticket and then complete the service ticket invoice.

The SwiftLink™ “**Help Desk**” will answer many of your questions, and it will do so without any telephone calls or paging through any manuals! All you have to do is highlight “Help Desk” from the main SwiftLink™ menu and press the  key.

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Then just type in your question and get your answer immediately. Actually, you do have a manual in the form of our computerized **help screens**. All you have to do is press the  help key, and the SwiftLink™ documentation (the manual) is available to you all the time. In fact if you have a multi-user system (network), the manual is available to all users. This saves you money. It is also easy for us to keep the SwiftLink™ documentation as up to date as is possible.

We pride ourselves on being able to provide outstanding telephone support via our **toll free hotline** to answer your questions. However, if you feel the need for in-depth training, we can provide that with our **Tele-Help**, which is available in 1/2 hour blocks for a very reasonable fee, and for those of you who would prefer on-site training, we can arrange that as well.

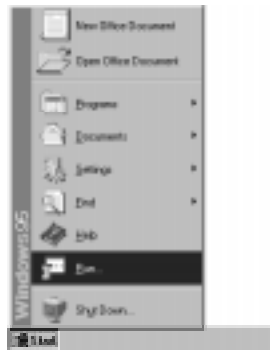
We can help save our trees and have fewer landfills if less paper is used. **Computerized** manuals can help protect the environment by leading the way toward a paper-less society.

## LET'S GET STARTED

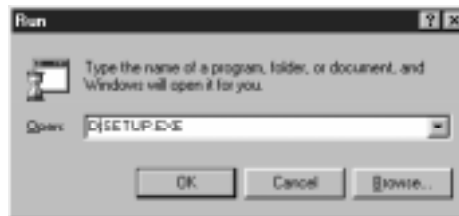
Now let's get started!

**Step 1:** Insert the CD into your CD ROM drive.

**Step 2:** Windows 95 users “Click” on START. Next “Click” on RUN. (If you are using Windows 3.X, “Click” on the File menu of your Windows Program Manager, and select RUN.)



**Step 3:** Type **D:SETUP.EXE** and “Click” on OK. If your CD ROM drive is not “D”, type the correct drive letter instead of D.



**Step 4:** Follow the instructions on the screen. When you are prompted to “Please enter the Drive where SwiftLink should be installed”, “Click on NEXT if “C” is the hard drive where SwiftLink™ is to be installed. If SwiftLink is to be loaded to a different drive - ie. the hard drive of a file server - then “Click” on

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**BROWSE.** In the “Path” field, type the correct hard drive, followed by :\PARTS - ie. F:\PARTS - if “F” is the correct hard drive. SwiftLink™ must be installed in the \PARTS directory no matter what hard drive you choose. After selecting the appropriate drive “Click” on OK. You will now be returned to the “Drive” screen; “Click” on NEXT.

**Step 5:** “Click” the type of Setup you prefer, then “Click” on NEXT.


**Step 6:** SwiftLink™ will prompt you through the remainder of the installation.

**Step 7:** When the installation is complete, “Click” on FINISH.

If you are loading from a 3<sup>1/2</sup>" floppy disk all you need to do is type...

C: /> **A:SETUP**

After you finish installing your new software, the SwiftLink™ “Wizard” will help you quickly adapt our software to your business. After you and the “Wizard” have installed SwiftLink™, turn to the POS/Service Sample in this guide.

The “Wizard” takes you automatically into the SwiftLink™ program. In the future when you turn your computer on, if there is not a menu on your screen, simply type “SL” from the MS-DOS® prompt and press the  key. The main menu will appear.

## EXPLANATIONS OF KEYBOARD FUNCTIONS & TERMS

### Using the Keyboard:

Keys that do not produce a character appear as:

Booster Keys:  Pointer Keys:  

Others:   

### Terms and Examples:

Bold Print: **Menu options as they appear on the screen within SwiftLink™.**

Bold/All Cap: **SCREEN NAMES WITHIN SWIFTLINK™.**

“Regular Type”: “Field names found on the current screen within SwiftLink™.”




Bold Blue Print: **INFORMATION YOU TYPE IN.**

Bold/Cap/Italics: ***PROGRAMDEFAULT***

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## SWIFTLINK DEMO MODE

In order to facilitate your SwiftLink™ learning process, we have created a “practice” session that will allow you to simulate transactions, service calls, and other various tasks without affecting the actual company data. This session runs in a “Demo mode”. This “practice” data will not be backed up, when you perform a daily SwiftLink™ backup.

To activate the “Demo mode” select **System Options** from the main menu,  to **Customize SwiftLink**,  until you can select **Demo/Live Database**. Use the  key to switch between the two different program modes. Now notice that your screen has gone red with “DEMO MODE” in both the upper left and right corners of your menu. Also, notice the general heading on your main menu, it should say **SWIFTLINK’S DEMO SYSTEM**. The main menu will be the only screen that is red during the demo mode practice session. When you are in the “Live mode” the general heading on the main menu will state your company’s name.

If you are on a network, one station can be in the “Demo” mode while the other stations are in the “Live mode”. However, that one workstation will remain in the “Demo mode” until you physically change that workstation to the “Live mode”.

**Important Note:** Always make certain that if you want to be in the “Demo mode” that your main menu heading says **SWIFTLINK’S DEMO SYSTEM**. Do not leave the system in “Demo mode” when not practicing. You will have to re-enter all transactions into the “Live mode” in order to have SwiftLink™ account for each transaction.
















## POS/SERVICE TUTORIAL

We want you to see how easy it is to get started with SwiftLink™! *Before you begin your practice session, please manually switch the program to the “Demo mode”. Following the instructions in the SwiftLink™ “Demo mode” section on page 10.*
























If you do **service** or sell **parts**, go to **ROUTINE #1**.

If you are a **retailer**, go to **ROUTINE #2**.









### ROUTINE #1.
















**Inventory (Parts/Non-Serialized) Transaction.** You should be at the main SwiftLink™ menu. Press the  key to highlight **Point of Sale (POS)**. Now press the  key. At the “Acct #” field, type **CS** and press the  key. Notice how the cursor quickly moved to the “Product Number” field. Type **95405** in the “Product Number” field and press the  key. The cursor is in the “Qty” field with 1 pre-filled in for you. Press the  key two (2) times; the cursor is now back at the “Product Number” field. Type **35036** in the Product Number field. Notice that a blue pop-up window has now appeared on the screen. Highlight **Inventory** and press the  key. Since SwiftLink™ did not find an exact match, the **Selection Type** window appeared. You are now looking at an Inventory Selection screen, allowing you to sell a Non Stock Part # or pick the exact part you are looking for. Press the  key to **350365**, and press the  key. Now press the  key two (2) times. Next press the  key. The cursor is now in the “Del”(ivery) field. Press the  key. At the **METHOD OF PAYMENT** Screen, highlight **Cash Only**, and press the  key. Type **50** in the “Amount Tendered” field and press the  key. Notice that the customer’s change appears in the “Customer’s Change” field. Now press the  key. The system will show the invoice number and either print the invoice or ask if you want to print the invoice. If SwiftLink™ asks if you want to print, highlight Yes, and press the  key, (see page 35). *See how Easy it is to create a Point-of-Sale Invoice!*

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**Service Transaction.** At the SwiftLink™ main menu, press the  key to highlight **Service Partner**, and press the  key. At the “Ticket #” field, press the  key. SwiftLink™ will automatically pre-filled a Ticket number. You are now at the “Acct #” field. Type **5551212** (i.e. the customer’s phone number without the dash) in the “Acct #” field, and press the  key. You will notice that “Notes   key and the  key simultaneously so you can see what notes are available for this customer. You will see the directions to this customer’s house. The first two (2) lines of the notes will print on the service ticket because they are preceded by an astrisk (\*). Press the  key. Highlight **YES** by pressing the , and press the  key. The cursor is now in the “Bill To #” field; and press the  key. The cursor is now at the “Ad Code” field. Press the  key down to “Trouble Reported”. Type **WASHER LEAKS** in this field, and now press the  key two (2) times. You will notice that an Equipment Serviced pop-up window is now available for you to enter in as much as you or the customer knows about the appliance. Type **W** in the “Make” field; press the  key. Type a **W** in the “Product” field; press the  key. Now type **LA5500XKW1** in the “Model #” field; press the  key and the  key. Type **JOE** in the “Technician” field; type **DAY’S DATE** in the “Scheduled Date” and press the  key. You will notice that “AM CALL BEFORE 12:00P” is highlighted. Press the  key. Type  (for Home Repair) in the “Type of Call” field, and press the  key. Now press the  key. If the Downpayment window appears, just press the  key. Your service ticket will print out. Notice how the directions to the customer’s house printed on the service ticket, (see page 36).












*Service Partner is easy too!*

**Service Ticket Invoicing.** Type the recently completed Ticket number in the “Ticket #” field, and press the  key. The cursor is now in the “Service Performed” field. Type **REPLACED BELT & PUMP**, and press the  key. Press the    , “View Equipment Svc   key to enter the serial number of the washer since Joe wrote the number on the




service ticket while he was at customer's house. Press the  key over to "Serial #" field, and type **WHP98765** in this field and press the  key. Press the  key until the cursor is underneath "HR". Type **HR** in this field, and press the  key until the cursor is underneath "Date Svc". Type **today's date** in this field and press the  key until the cursor is in the "Loc" field. Type **T1** (overwriting W). Press the  key two (2) times, and then press the  . You are now looking at the **SERVICE INVOICING** screen. Press the  key until the cursor is in "Product Number" field. Type **95405** in this field, and press the  key three (3) times. Type **350365** in the "Product Number" field, and press the  key three (3) times. Type **LABT1** in the "Product Number" field, and press the  key three (3) times. Finally, type **SVCT1** in the "Product Number" field and press the  key three (3) times. Now press  twice. Highlight "Checks Only", and press the  key. Now type **351** (check number) in the "Check Number" field, and press the  key. Now print the invoice (see pages 37 and 38). ***This is TOO Easy!!!***

*Remember to manually switch the program to the Live mode to begin entering your everyday transactions. Otherwise, important company data will not be accounted for within SwiftLink™.*














## **ROUTINE #2.**

**Serialized Transaction and you know the serial number of the appliance.** From the main menu, press the  key and highlight **Point-of-Sale (POS)**. Now press the  key. At the "Acct #" field, press the  key, and the type **ROBERTSON** in the Name field on the **CUSTOMER PROFILE NAME SEARCH** pop-up window.  until ROBERTSON,TOM is highlighted. Press the  key. See how easy it was to bring Tom's account to the POS screen. The cursor is now in the "Bill To" field. Press the  key until the cursor is in the "Product Number" field. Type **LA5500XKW1** and press the  key. When the **SERIAL SELECTION** screen appears,  until S/N is highlighted. Press the  key two (2) times. Now press the  key two (2) times. Choose the "On Account" method of payment, and press the  key.








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key, and type **100** in the “Downpayment” field and press the  key. Now type **352** in the “Check Number field”. Press  key, and you will see how SwiftLink™ assigned the invoice number and either printed the invoice, or asked if you wanted to print - say **YES**, and press the  key, (see page 40). Congratulations!  
*Point of Sale is easy with SwiftLink™!!!!!!!!!!*

**Serialized Transaction and you don’t know the serial number.**

From the main menu, highlight **Point-of-Sale (POS)**, and press the  key. At the “Acct #” field, press the  key. When the **CUSTOMER PROFILE NAME SEARCH** screen appears, type **SCHWARTZ** in the “Name” field and press the  key. Highlight **SCHWARTZ,JAMES** and press the  key. You are now back at the POS screen, and the cursor is in the “Bill To#” field. Press the  key until the cursor is in the “Product Number” field. Type **TDE546RB** in the “Product Number” field. As soon as you press the  key, the **SERIAL SELECTION** screen pops up with the appropriate dryer. The highlighted option is <-Apply Serial # Later->. Press the  key. Press the  key two (2) more times, and then press the  key twice. The method of payment to highlight is “Checks Only”. Press the  key. Type in the “Check Number” field. Press the  key and then press the  key. The invoice will either print now, or the system will ask you if you want it to print. Highlight **YES** and press the  key, (see page 41). *Did you think it could be so Easy?*

**Reports:**

From the main menu, highlight **Reports & Statements**, and press the  key. Highlight **End of Day Reports**, and press the  key. Then press the  key after the **Invoice Register** is highlighted. “Run” the Invoice Register. After you have done that, press  back to the main menu. Highlight **Reports & Statements** one more time and press the  key.  to **Sales Related Reports**, and press the  key. Take a look at the **Sales Analysis Report**.

*It’s easier to computerize than you thought !!!!!!!!!!!!!!!*

*Remember to manually switch the program to the “Live mode” to begin entering your everyday transactions. Otherwise, important company data will not be accounted for within SwiftLink™.*

### Data Used for This Session:

#### Customers:

<u>Account #</u>	<u>Account Name</u>
AAA	AAA DISTRIBUTOR
5551212	BEASLEY, WINSTON
CS	CASH SALE
8785432	ROBERTSON, TOM
6183451671	SCHWARTZ, JAMES

#### Labor Set Up:

<u>Loc</u>	<u>Make</u>	<u>Number</u>	<u>Price</u>
T1	LAB	LABT1	40
T1	LAB	SVCT1	35
W	LAB	LAB	40
W	LAB	SVC	35

#### Parts Inventory:

<u>Loc</u>	<u>Make</u>	<u>Part Number</u>
T1	MAC	211124
T1	MAC	211125
T1	WPL	350365
T1	WPL	95405
W	MAC	211124
W	MAC	211125
W	WPL	350365
W	WPL	95405

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WelcomeSerial Inventory: (Loc - W)

<u>Make</u>	<u>Model</u>	<u>S/N</u>
FRG	TDE546RB	FRG22211
FRG	TDE546RB	FRG4325
FRG	TDG546RB	FRG4321
FRG	TDG546RE	FRG1000
FRG	TDG546RE	FRG2000
FRG	TDG546RE	FRG3000
FRG	TDG546RE	FRG4000
FRG	TDG546RE	FRG5000
FRG	TDG546RE	FRG6000
MAY	LAT9604AAE	MAY100
MAY	LAT9604AAE	MAY101
MAY	LAT9604AAE	MAY200
MAY	LAT9604AAE	MAY300
WHP	LA5500XKW1	WHP100
WHP	LA5500XKW1	WHP101
WHP	LA5500XKW1	WHP200
WHP	LA5500XKW1	WHP201
WHP	LA5500XKW1	WHP203
WHP	LA5500XKW1	WHP204
WHP	LA5500XKW1	WHP205
WHP	LA5500XKW1	WHP206

## Appendix A

### INSTALLATION REQUIREMENTS

In order for SwiftLink™ to execute properly, minimum system requirements must be met.

#### **Single User System:**

We recommend a 586 Computer with Windows® 95, a 1.0GB or larger hard drive, 16MB of RAM memory, CD-ROM drive, a 28.8K baud rate modem or faster, and a compatible printer. At a minimum, you should have a 486 PC with MS-DOS®, version 6.X, a 420MB hard drive, 4MB of RAM memory, a 9600 baud modem, and a compatible printer.

Single User System or Workstation minimum memory requirements:

#### Minimum Memory:

Windows® 95 PC	8MB
Windows® 3.X PC	4MB
MS-DOS® PC	4MB

We recommend that you have the following minimum settings in your AUTOEXEC.BAT and CONFIG.SYS files.

#### Standard AUTOEXEC.BAT

#### **MS-DOS® 6.2X or MS-DOS® 6.2X & Windows® 3.X:**

```
@ECHO OFF
```

---

```
PROMPT $P$G
PATH=C:\;C:\DOS;
C:\DOS\SMARTDRV.EXE /X
```

**MS-DOS® 6.1X & Prior Versions or MS-DOS® 6.1X & Prior  
Versions & Windows® 3.X**

```
@ECHO OFF
PROMPT $P$G
PATH=C:\;C:\DOS;
C:\DOS\SMARTDRV.EXE C
```

**Windows® 95**

AUTOEXEC.BAT not needed.

Standard CONFIG.SYS

**MS-DOS® or MS-DOS® & Windows® 3.X:**

```
DEVICE=C:\DOS\HIMEM.SYS
DEVICE=C:\DOS\EMM386.EXE NOEMS
DOS=HIGH, UMB
FILES=60
BUFFERS=15
DEVICE HIGH=C:\DOS\ANSI.SYS
```

**Windows® 95:**

```
DEVICE=C:\WINDOWS\HIMEM.SYS
DEVICE=C:\WINDOWS\EMM386.EXE NOEMS
DOS=HIGH, UMB
FILES=60
BUFFERS=40
DEVICEHIGH=C:\WINDOWS\COMMAND\ANSI.SYS
```

**Network:**

Our network systems of choice are Windows® 95 Peer to Peer or Windows NT® Server with Windows® 95 at each workstation. With an “NT” network, as well as Novell®, you have a “dedicated file server”. A dedicated file server is dedicated to being a file server **ONLY**. In other words, you cannot use it as an input station. Novell® 3.XX and higher is supported. LANtastic® version 5.0 and higher is currently supported.

Please see the section: Network Configuration Guidelines for more information.

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## Appendix B

### NETWORK CONFIGURATION GUIDELINES

1. If you are running a “Windows® 95” peer-to-peer network, you will need a minimum of 8MB (16MB recommended) in the workstations and 8MB (16 MB recommended) in the server. If you are running Windows NT® Server, with Windows® 95 at the workstations, the server should have 32MB or greater, and the workstations should have 8MB or greater (16 MB recommended).
2. All PC’s should have the same drive letter to the server. We recommend H. Do not go higher than H. (ie. do not use I, J, K, L, M, N, O, etc.)
3. All disk caching programs must have the write behind cache disabled.
4. All disk caching programs should be loaded after the network is loaded.
5. Windows® **must not** be run with any LANtastic® version lower than 6.0.
6. **Peer to Peer networks only -**  
Share should be loaded in the AUTOEXEC.BAT file. If you are running “Windows® for Workgroups” and the network is not loaded, and you have not installed share, a “Record Lock - Status 93” error condition will occur.
7. **Novell® Dedicated Servers Only -**  
If you are running a version lower than 4.0, be sure all “patches” or upgrades are loaded. Share **must not** be loaded. All files in the PARTS directory must be flagged as Share, Read and Write, (SRW - this needs to be set after all updates). Must have Login rights as Parental or higher. Parts must be

directly off the root directory on the server. Logical search drive should be “\PARTS”.

8. The CONFIG.SYS example will remain as stated however you will be selecting “HIMEM.SYS” and “EMM386.EXE” from the “Windows” directory not “DOS”.

AUTOEXEC.BAT & CONFIG.SYS files can vary considerably from machine to machine.

### **Networks:**

Peer to Peer: Non-Dedicated File Server. File Server can be used as a workstation or input station.

### **Windows® 95 / Workstation**

#### **CONFIG.SYS (Minimums)**

```
DEVICE=C:\WINDOWS\HIMEM.SYS
DEVICE=C:\WINDOWS\EMM386.EXE NOEMS
DOS=HIGH, UMB
FILES=60
BUFFERS=40
FCBS=16,8 (LANtastic® Only)
```

The AUTOEXEC.BAT file is not needed for a Windows® 95 Workstation.

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## **Windows® 95 / Server**

### **CONFIG.SYS (Minimums)**

```
DEVICE=C:\WINDOWS\HIMEM.SYS
DEVICE=C:\WINDOWS\EMM386.EXE NOEMS
DOS=HIGH, UMB
FILES=100 (60 + 40 PER WORKSTATION WITH 250
MAXIMUM)*
BUFFERS=40
FCBS=16,8 (LANtastic® Only)
```

\*The “FILES” statement should be set at 60, plus 40 per workstation. For example, 1 additional workstation, plus a server would be set to 100 (60 for the server and 40 for the additional workstation). (Maximum is 250).

The AUTOEXEC.BAT file is not needed for a Windows® 95 Server.

### **MS-DOS® 6.2X OR MS-DOS® 6.2X & Windows® 3.X Workstation**

#### **CONFIG.SYS**

```
DEVICE=C:\DOS\HIMEM.SYS
DEVICE=C:\DOS\EMM386.EXE NOEMS
DOS=HIGH, UMB
FILES=60
BUFFERS=15
DEVICE HIGH=C:\DOS\ANSI.SYS
```

#### **AUTOEXEC.BAT**

```
@ECHO OFF
PROMPT $P$G
PATH=C:\;C:\DOS;
C:\DOS\SMARTDRV.EXE /X
```

**MS-DOS® 6.1X & Prior Versions OR MS-DOS® 6.1X & Prior Versions & Windows® 3.X Workstation****CONFIG.SYS**

```
DEVICE=C:\DOS\HIMEM.SYS
DEVICE=C:\DOS\EMM386.EXE NOEMS
DOS=HIGH, UMB
FILES=60
BUFFERS=15
DEVICE HIGH=C:\DOS\ANSI.SYS
```

**AUTOEXEC.BAT**

```
@ECHO OFF
PROMPT $P$G
PATH=C:\;C:\DOS;
C:\DOS\SMARTDRV.EXE C
```

**MS-DOS® or Windows® 3.X Servers****CONFIG.SYS**

```
DEVICE=C:\DOS\HIMEM.SYS
DEVICE=C:\DOS\EMM386.EXE NOEMS
DOS=HIGH, UMB
FILES=100 (60 + 40 PER WORKSTATION WITH 250
MAXIMUM)*
BUFFERS=40
FCBS=16,8 (LANtastic® Only)
```

\*The “FILES” statement should be set at 60, plus 40 per workstation. For Example, 1 additional workstation, plus a server would be set to 100 (60 for the server and 40 for the additional workstation). (Maximum is 250).

---

## **AUTOEXEC.BAT**

The AUTOEXEC.BAT for the server is the same as the workstation. The necessary autoexec.bat file will be found under the corresponding MS-DOS® version and /or Windows® 3.X version. Dedicated File Server (like Novell® or Windows NT®) should be set per Operating System specification.

## Appendix C **SwiftLink™ FLOW CHART**

### **Inquiry**

Search for Parts Numbers of the distributor.  
Search for Numbers in your inventory.  
Search by description of items in your inventory.

### **Point of Sale**

Invoicing for Inventory and Non-Inventory  
Items / Parts            Model Numbers  
Serial Numbers        Frame Numbers  
Rental Contracts      Installment Contracts

### **Service Partner**

Create & Print Service Tickets  
Finalize & Print Completed Tickets  
Transfer Service Information to Warranty  
Print NARDA / NESDA Forms

### **Create / Receive PO's**

Create or Edit a Purchase Order  
Receive an Existing Purchase Order  
Transmit / Send a Purchase Order  
Print Purchase Order Receiving Document

### **Accounts Payable**

---

Enter A/P Invoices	A/P Direct Pay
A/P Invoice Selection	A/P Invoice Inquiry
Review Selected Inv's	Review Recurring Payments
Print A/P Checks	Bank Reconciliation
Enter A/P Suppliers	

### **General Ledger**

Enter G/L Posting

### **Reports & Statements**

See Attachments

### **Customers**

Enter Customer Information

### **Checks & Payments**

Store Account Payments	Rental Payments
Service Contract Payments	Layaway Payments
Installment Payments	Add Finance Payments
Invoice Inquiry	Payment Inquiry
Allocate Credit Memo	

### **Inventory**

To Add & Maintain the various types of inventory  
Parts, Serial, and Furniture

### **Inventory Adj's**

Floor Planning	Build Inventory Kits
----------------	----------------------

Manual Posting System      Loc Xfer from Sales  
 Input Substitutions

### **Installments**

Installment Inquiry      Customer Profile  
 Credit Application      Collection Program  
 Post Late Fees      Manual Input Existing

### **Help Desk**

Questions & Answers

### **Fix It Shop**

See Attachments

### **System Options**

SwiftLink™ Defaults  
 See Attachments

### **Warranty & Contracts**

NARDA/NESDA Warranty      Service Contracts  
 Extended Service Contract      Crown Warranty

### **Rent to Own**

Input Rental Contracts      Input Past Payments  
 Input Rental Inventory      Rental Inventory Inquiry  
 Payment Schedule      Delete Closed Contracts  
 Company Information      Billing Parameters

Design Contract

#### **System Options**

- 1..Backup SwiftLink™ Files to Disk
- 2..Customize SwiftLink™
- 3..Electronic Mail Creation

- 
- 4..Electronic Mail Transmit
  - 5..Export Profile Information
  - 6..Export Inventory Information
  - 7..Print Customer Address Labels
  - 8..Print Distributor's Promotion
  - 9..Print Inventory Bin Labels
  - 10..Print Furniture Labels
  - 11..Print On-Line Help Screens
  - 12..Print Vendors List
  - 13..Print Model Inquiry List
  - 14..Remove Old History
  - 15..Repair Data Base
  - 16..Restore SwiftLink™ Files from Disk
  - 17..Security Administrator
  - 18..Show System Status
  - 19..Update SwiftLink™ from Mailbox
  - 20..Virus Scan
  - 21..Copy Files From CD-ROM

**Customize SwiftLink™**

- 1..Account Default Setup
- 2..Advertising Code Setup
- 3..Auto Account Number Setup
- 4..Brand Abbreviation Setup
- 5..City Abbreviation Setup
- 6..Column Price Margin Manager
- 7..Department Code Setup
- 8..Furniture Cost Selection Control
- 9..Furniture Item Control
- 10..General Ledger Control
- 11..General Ledger Interface Control
- 12..General Ledger Master
- 13..Installment Contract Control
- 14..Installment Contract Insurance Setup
- 15..Job Code Abbreviation Setup
- 16..Location Abbreviation Setup
- 17..Model & Pricebook Path Setup
- 18..N.A.R.D.A. Control Setup
- 19..Payables Control Screen
- 20..Point of Sale Default Setup
- 21..Point of Sale Forced Fields
- 22..Point of Sale Screen Selection
- 23..Product Type Abbreviation Setup
- 24..Program Logon Setup
- 25..Program Security Administrator

- 26..Salesman Code Setup
- 27..Salesman Commission Setup
- 28..Salesman Spiff Setup
- 29..Sales Tax Table Setup
- 30..Serial Delivery Setup
- 31..Service Code Setup
- 32..Service Partner Setup
- 33..Supplier Code Setup
- 34..Technician Abbreviation Setup
- 35..Modem Setup
- 36..Print Manager
- 37..Demo/Live Database
- 38..Estimate Call Back

**Fix it Shop**

- 1..Assign or Exchange Serial Numbers
- 2..Change an Account Number
- 3..Change Account Numbers Listing Report
- 4..Clear Inventory Fields
- 5..Correct Furniture Master
- 6..Delete Closed Rental Contracts
- 7..Delete Inventory by Location
- 8..Duplicate Furniture Inventory by Location
- 9..Duplicate Inventory by Location
- 10..Edit Floor Planning Detail
- 11..Edit Serviced Model & Serial Information
- 12..Input Past Rental Payments
- 13..Inventory Master Global Input/Import
- 14..Rebuild Individual Files
- 15..Return a Bad Check
- 16..Transfer Floor Plan Note Information
- 17..Transfer Service Calls
- 18..Update Undelivered Sales
- 19..Void an Invoice, Estimate, or Layaway
- 20..Void a Payables Check
- 21..Modify PO Invoice #
- 22..Open Model Manual Removal
- 23..Upload 'Scanned' Inventory
- 24..'Scanned' Inventory Update
- 25..'Scanned' Serial Inventory Update
- 26..Update Inventory Master

---

**SwiftLink™ FLOW CHART - Reports & Statements**
**1..End of Day Reports**

- 1..Invoice Register
- 2..Daily Deposit
- 3..Cash Receipts Report
- 4..Advertising By Code
- 5..Daily Sales Report
- 6..Daily Sales Report
- 7..Daily Usage Report

**2..Month End Reports**

- 1..Daily Sales Reports
- 2..Sales Analysis
- 3..Sales Tax
- 4..Detailed Sales Tax
- 5..Future Stock Report

**3..Statement Printing****4..Rental Billing Statements****5..Service Contract Statements Billing****6..Accounts Payable Reports**

- 1..A/P Batch Listing
- 2..A/P Cash Requirements Report
- 3..A/P Daily Activity Listing
- 4..A/P Printed Check Report
- 5..A/P Vendor Listing

**7..Floor Plan Reports**

- 1..FP Availability Report - All Item
- 2..FP Availability Report - Financed Items
- 3..FP Full Note Report - All Items
- 4..FP Notes Due Report
- 5..FP Report by Model Number
- 6..FP Sales Report - All Items
- 7..FP Sales Report - Financed Items

**8..Furniture Reports**

- 1..Furniture Aged Inventory Report
- 2..Furniture Availability
- 3..Furniture Backorder Report
- 4..Furniture Below Reorder Report
- 5..Furniture Comparison
- 6..Furniture Customer Sales by Frame
- 7..Furniture Estimate Reorder Point
- 8..Furniture Excess Stock
- 9..Furniture Future Stock
- 10..Furniture Item Numbers by Due Date

**8..Furniture Reports (Con't.)**

- 11..Furniture Item Number's Search
- 12..Furniture Item Numbers Sold
- 13..Furniture Manually Priced Items
- 14..Furniture Master Prices
- 15..Furniture Open Frame
- 16..Furniture Open to Buy
- 17..Furniture Physical Inventory Form
- 18..Furniture Posting Activity
- 19..Furniture Price Book
- 20..Furn. Price Book <sup>w</sup>Fabrics & Color

**9..General Ledger Reports**

- 1..G/L Activity Report
- 2..G/L Balance Sheet
- 3..G/L Chart of Accounts
- 4..G/L Debit/Credit by Source
- 5..G/L Missed Interfaced CGS
- 6..G/L Profit & Loss
- 7..G/L Trial Balance
- 8..Inventory G/L # Listing

**10..Installment Contract Reports**

- 1..Amortization Report
- 2..Contract Aging Report
- 3..Contract Listing
- 4..Late Fee Report / Reminders
- 5..Insurance Report
- 6..Payment Register
- 7..Refund Report
- 8..Install Payments on Write Off Contracts

**11..Inventory Reports**

- 1..Backorder Report
- 2..Below Reorder Point
- 3..Estimate Reorder Point
- 4..Excess Stock
- 5..Future Stock Report
- 6..Kit Master Listing
- 7..Manually Priced Items
- 8..Master Listing
- 9..Negative Inventory Stock Report
- 10..Physical Inventory Forms
- 11..Posting Activity
- 12..Price Book
- 13..Product Recall
- 14..Recall Purchase Order History
- 15..Stock Valuation

**11..Inventory Reports (Con't.)**

- 16..Suggested Stock Level
- 17..Zero Sales Stock Report

**12..Invoice Related Reports**

- 1..Advertising Analysis by Code
- 2..Advertising Analysis by Product Type
- 3..Cash Receipts Report
- 4..Customer Sales Summary
- 5..Customers with Alarms
- 6..Detailed Aged Analysis
- 7..Detailed Aged Analysis Layaway
- 8..Individual Payment History
- 9..Layaway Report
- 10..Summary Aged Analysis
- 11..Unallocated Credits
- 12..Unapplied Cash Report
- 13..Voided Invoice Report
- 14..Invoicing Notes
- 15..Inventory Point of Sale Notes
- 16..Estimate/Invoice Analysis
- 17..Estimate Callback Report

**13..Rental Contract Reports**

- 1..Billing Register
- 2..Customer Payment History
- 3..Delinquency
- 4..Future Revenue
- 5..Inventory Cost Analysis
- 6..Inventory by Item Number
- 7..Inventory Tracking
- 8..Rental Inventory

**14..Sales Related Reports**

- 1..Daily Deposit
- 2..Daily Sales Report
- 3..Daily Sales Report by Invoice Date
- 3..Invoice Register
- 4..Proces Changed at Point of Sale
- 5..Sales Analysis
- 6..Sales Commission Report
- 7..Sales Spiff Report
- 8..Sales Tax
- 9..Detailed Sales Tax
- 10..Sales by Zip Code
- 11..Undelivered Sales Report

**15..Serial Inventory Reports**

- 1..Aged Inventroy Report

**15..Serial Inventory Reports (Con't.)**

- 2..Backorder Report
- 3..Below Reorder Point
- 4..Customer Sales by Model
- 5..Estimate Reorder Point
- 6..Excess Stock
- 7..Future Stock Report
- 8..Manually Priced Items
- 9..Model Number Price Book
- 10..Posting Activity
- 11..Sales Pending Serial No's
- 12..Serial Comparison
- 13..Serial Numbers Available
- 14..Serial No's Avail. Special Format
- 15..Serial Numbers Reserved
- 16..Serial Numbers by Due Date
- 17..Serial Number Search
- 18..Serial Numbers Sold
- 19..Serial Open to Buy
- 20..Serial Price Book
- 21..Stock Valuation

**16..Service Contract Reports**

- 1..Annual Renewal Forms
- 2..Batch Print Contracts
- 3..Contracts Due to Expire
- 4..Customers w/Pre. Main.
- 5..Prev. Maint. by Month/Product
- 6..Service Contracts by Sales/Tech

**17..Service Partner Reports**

- 1..Ad Analysis by Code
- 2..Ad Analysis by Product
- 3..CFC / Refrigerant Usage Report
- 4..Customer Histroy Report
- 5..Dispatching Report
- 6..Histroy by "Bill To"
- 7..Parts on Order Ticket Report
- 8..Service Cash Report
- 9..Service Ticket Averages
- 10..Service Ticket Report
- 11..Technician Commission
- 12..Technician Productivity
- 13..Unused Ticket Listing
- 14..Service Histroy by Model
- 15..Technician Costing Report
- 16..Service Invoice Analysis

---

## Appendix D POS Examples

DATE: 96/10/07                      SWIFTLINK / CUSTOMER PROFILE                      PAGE: 1  
 DIRECTORY OF ACCOUNTS

ACCOUNT NUMBER	ACCOUNT NAME	A D D R E S S
AAA	AAA DISTRIBUTOR	2345 JEFFERSON ST. LOUIS                      MO 63103 HOME PHONE: (314)231-7521      WORK PHONE: ( )000-0000 EXT:
5551212	BRASLEY, WINSTON	2300 CLARK AVE. ST. LOUIS                      MO 63103 HOME PHONE: (314)555-1212      WORK PHONE: (314)231-6755 EXT: 876
CS	CASH SALE	***** HOME PHONE: ( )000-0000      WORK PHONE: ( )000-0000 EXT:
8785432	ROBERTSON, TOM	1234 FEE FEE RD MARYLAND HEIGHTS                      MO 63144 HOME PHONE: (314)878-5432      WORK PHONE: (314)567-2160 EXT:
6183451671	SCHWARTZ, JAMES	211 LEBANON AVE BELLEVILLE                      IL 62221 HOME PHONE: (618)345-1671      WORK PHONE: ( )000-0000 EXT:

DATE: 10/08/96 SWIFTLINK/INVENTORY PRICE BOOK PAGE: 1  
 LOCATION: T1 MAKE: LAB

BIN	PART	DESCRIPTION	COLUMN1	COLUMN2	COLUMN3	COLUMN4
	LABT1	LABOR (1) HOUR	40.00			
	SVCT1	SERVICE CALL	35.00			

DATE: 10/08/96 SWIFTLINK/INVENTORY PRICE BOOK PAGE: 2  
 LOCATION: T1 MAKE: MAC

BIN	PART	DESCRIPTION	COLUMN1	COLUMN2	COLUMN3	COLUMN4
	211124	BELT	10.10			
	211125	BELT	11.35			

DATE: 10/08/96 SWIFTLINK/INVENTORY PRICE BOOK PAGE: 3  
 LOCATION: T1 MAKE: WPL

BIN	PART	DESCRIPTION	COLUMN1	COLUMN2	COLUMN3	COLUMN4
	350365	PUMP	28.15			
	95405	BELT	11.10			

DATE: 10/08/96 SWIFTLINK/INVENTORY PRICE BOOK PAGE: 4  
 LOCATION: W MAKE: LAB

BIN	PART	DESCRIPTION	COLUMN1	COLUMN2	COLUMN3	COLUMN4
	LAB	LABOR (1) HOUR	40.00			
	SVC	SERVICE CALL	35.00			

DATE: 10/08/96 SWIFTLINK/INVENTORY PRICE BOOK PAGE: 5  
 LOCATION: W MAKE: MAC

BIN	PART	DESCRIPTION	COLUMN1	COLUMN2	COLUMN3	COLUMN4
	211124	BELT	10.10			
	211125	BELT	11.35			

DATE: 10/08/96 SWIFTLINK/INVENTORY PRICE BOOK PAGE: 6  
 LOCATION: W MAKE: WPL

BIN	PART	DESCRIPTION	COLUMN1	COLUMN2	COLUMN3	COLUMN4
	350365	PUMP	28.15			
	95405	BELT	11.10			

DATE: 96/10/07 SWIFTLINK / INVENTORY CONTROL PAGE: 1

STOCK VALUATION REPORT  
 PRODUCT : ALL DETAIL FORMAT

LOC.	MAKE	PART NUMBER	DESCRIPTION	ON HAND	RPL COST	TOTAL VALUE
T1	MAC	211124	BELT	1	\$5.99	\$5.99
T1	MAC	211125	BELT	1	\$6.39	\$6.39
T1	WPL	350365	PUMP	2	\$13.99	\$27.98
T1	WPL	95405	BELT	2	\$3.95	\$7.90
W	MAC	211124	BELT	36	\$5.99	\$215.64
W	MAC	211125	BELT	36	\$6.39	\$230.04
W	WPL	350365	PUMP	24	\$13.99	\$335.76
W	WPL	95405	BELT	24	\$3.95	\$94.80

DATE: 96/10/07 SWIFTLINK / INVENTORY CONTROL PAGE: 2

STOCK VALUATION REPORT  
 PRODUCT : ALL DETAIL FORMAT

LOC.	MAKE	PART NUMBER	DESCRIPTION	ON HAND	RPL COST	TOTAL VALUE
------	------	-------------	-------------	---------	----------	-------------

GRAND TOTAL ITEMS: 8  
 GRAND TOTAL DOLLAR VALUE: \$924.50

SWIFTY SALES & SERVICE  
 600 EMERSON AVE; SUITE # 410  
 ST LOUIS, MO 63141  
 (800) 794-3854

I N V O I C E

```

=====
INVOICE # 1003 ACCT# CS SL#
S CASH SALE S
O ***** H
L I
D P
=====
    
```

```

=====
DATE: 96/10/07 PO/NARDA TERMS: NET 10 DAYS PAY METHOD: CASH
=====
    
```

QTY	MAKE	PRODUCT	DESCRIPTION	PRICE	EXTENSION
1	WPL	95405	BELT	11.10	11.10
1	WPL	350365	PUMP	28.15	28.15

```

=====
SUB TOTAL 39.25 TAX 3.14 DBL DISC TOTAL 42.39
=====
    
```

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T H A N K Y O U



SWIFTY SALES & SERVICE  
 600 EMERSON AVE; SUITE # 410  
 ST LOUIS, MO 63141  
 (800) 794-3854

```

=====
ACCT#: 5551212          TICKET #: 100003          DATE OF ORDER: 96/10/07
WINSTON BEASLEY          MAP:
2300 CLARK AVE.          PROMISED: MON 96/10/07
ST. LOUIS, MO 63103      TIME * BEFORE 12:00P
                           PURCHASE DATE:
HOME#: 314-555-1212      WORK#: 314-231-6755 EXT: 876          P.O. #
MAKE          PRODUCT          MODEL          MFG #          SERIAL
WHIRLPOOL     WASHER          LA5500KKWL     MFG #          WHP98765
    
```

TROUBLE REPORTED:  
 WASHER LEAKS

HOME REPAIR					
QTY	MAKE	PART NO.	DESCRIPTION	PRICE	EXTENSION
1.00	WPL	95405	BELT	\$11.10	\$11.10
1.00	WPL	350365	PUMP	\$28.15	\$28.15
1.00	LAB	LABT1	LABOR (1) HOUR	\$40.00	\$40.00
1.00	LAB	SVCT1	SERVICE CALL	\$35.00	\$35.00

```

=====
SERVICE PERFORMED:          TOTAL MATERIALS          $39.25
                               SERVICE CALL
REPLACED BELT & PUMP          LABOR          $75.00
TECHNICIAN:JOE              1ST DT SVC:10/07/96 INVOICE: 1004
LOCATION: T1                  2ND DT SVC:
1- TIME IN:                 OUT:          TOTAL: 1. HRS          TAX          $3.14
2- TIME IN:                 OUT:          TOTAL:          HRS          TOTAL          $117.39
    
```

SIGNATURE \_\_\_\_\_  
 \*Signature above constitutes acceptance of service performed as being satisfactory and that the equipment has been left in good condition.

SWIFTY SALES & SERVICE  
 600 EMERSON AVE; SUITE # 410  
 ST LOUIS, MO 63141  
 (800) 794-3854

I N V O I C E

=====

INVOICE #	1004	ACCT#	5551212	SL#	
S	WINSTON BEASLEY			S	SRV 5551212 100003
O	2300 CLARK AVE.			H	BEASLEY, WINSTON
L				I	2300 CLARK AVE.
D	ST. LOUIS	MO	63103	P	ST. LOUIS MO
					(314)-555-1212

=====

DATE: 96/10/08 PO/NARDA      TERMS: NET 10 DAYS      PAY METHOD: CK#351

=====

QTY	MAKE	PRODUCT	DESCRIPTION	PRICE	EXTENSION
1	WFL	95405	BELT	11.10	11.10
1	WFL	350365	PUMP	28.15	28.15
1	LAB	LABT1	LABOR (1) HOUR	40.00	40.00
1	LAB	SVCT1	SERVICE CALL	35.00	35.00

REPLACED BELT & PUMP

=====

SUB TOTAL	114.25	TAX	3.14	DEL	DISC	TOTAL	117.39
-----------	--------	-----	------	-----	------	-------	--------

=====

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T H A N K   Y O U

DATE: 10/07/96 SWIFTLINK / SERIAL INVENTORY PAGE: 1  
 AVAILABILITY BY MAKE & MODEL

MAKE: FRG		MODEL: TDE546RB		DESC: DRYER/ELECTRIC			PROD TYPE: DRE	
SERIAL-NO	COLOR	LOC	FLOOR	DT-REC	GRACE	DUE-DT	PRICE	COST
FRG22211	WHITE	W	WH	06/13/96	120	10/10/96	329.00	269.00
FRG4325	WHITE	W	WH	07/15/96	120	11/11/96	329.00	269.00
FRG4321	WHITE	W	FL	09/15/96	120	01/12/97	329.00	269.00

MAKE: FRG		MODEL: TDG546RE		DESC: DRYER/GAS			PROD TYPE: DRG	
SERIAL-NO	COLOR	LOC	FLOOR	DT-REC	GRACE	DUE-DT	PRICE	COST
FRG1000	WHITE	W	WH	09/15/96	90	12/13/96	369.00	299.00
FRG2000	WHITE	W	WH	09/15/96	90	12/13/96	369.00	299.00
FRG3000	WHITE	W	FL	10/01/96	90	12/29/96	369.00	299.00
FRG4000	WHITE	W	WH	10/02/96	90	12/30/96	369.00	299.00
FRG5000	WHITE	W	EWH	10/02/96	90	12/30/96	369.00	299.00
FRG6000	WHITE	W	EWH	10/02/96	90	12/30/96	369.00	299.00

MAKE: MAY		MODEL: LAT9604AAE		DESC: WASHER			PROD TYPE: WSH	
SERIAL-NO	COLOR	LOC	FLOOR	DT-REC	GRACE	DUE-DT	PRICE	COST
MAY100	WHITE	W	FL	05/29/96	90	08/26/96*	489.00	379.00
MAY101	WHITE	W	WH	05/29/96	90	08/26/96*	489.00	379.00
MAY200	WHITE	W	WH	07/30/96	90	10/27/96	489.00	379.00
MAY300	WHITE	W	WH	10/02/96	90	12/30/96	489.00	379.00

MAKE: WHP		MODEL: LA5500XKW1		DESC: WASHER			PROD TYPE: WSH	
SERIAL-NO	COLOR	LOC	FLOOR	DT-REC	GRACE	DUE-DT	PRICE	COST
WHP100	WHITE	W	WH	03/31/96	90	06/28/96*	439.00	339.00
WHP101	WHITE	W	WH	04/30/96	90	07/28/96*	439.00	339.00
WHP200	WHITE	W	WH	05/31/96	90	08/28/96*	439.00	339.00
WHP201	WHITE	W	WH	06/30/96	90	09/27/96*	439.00	339.00
WHP203	WHITE	W	WH	07/29/96	90	10/26/96	439.00	339.00
WHP204	WHITE	W	WH	08/02/96	90	10/30/96	439.00	339.00
WHP205	WHITE	W	WH	09/30/96	90	12/28/96	439.00	339.00
WHP206	WHITE	W	FL	10/04/96	90	01/01/97	439.00	339.00

TOTAL COST : \$6829.00

SWIFTY SALES & SERVICE  
 600 EMERSON AVE; SUITE # 410  
 ST LOUIS, MO 63141  
 (800) 794-3854

I N V O I C E

-----  
 INVOICE # 1005 ACCT# 8785432 SL#  
 S TOM ROBERTSON S  
 O 1234 FEE FEE RD H  
 L MARYLAND HEIGHTS MO 63144 I  
 D (314)-878-5432 P

-----  
 DATE: 96/10/08 PO/NARDA TERMS: NET 10 DAYS PAY METHOD: ON ACCOUNT  
 -----

QTY	MAKE	PRODUCT	DESCRIPTION	PRICE	EXTENSION
1	WHP	LA5500XKW1	WASHER SERIAL# WHP100	439.00	439.00

-----  
 SUB TOTAL 439.00 TAX 35.12 DEL DISC TOTAL 474.12  
 -----

\$100.00 DOWNPAYMENT, \$374.12 CHARGED TO ACCOUNT

T H A N K Y O U

SWIFTY SALES & SERVICE  
 600 EMERSON AVE; SUITE # 410  
 ST LOUIS, MO 63141  
 (800) 794-3854

I N V O I C E

-----  
 INVOICE # 1006 ACCT# 6183451671 SL#

S	JAMES SCHWARTZ	S
O	211 LEBANON AVE	H
L		I
D	BELLEVILLE IL 62221	P

(618)-345-1671

-----  
 DATE: 96/10/08 PO/NARDA TERMS: NET 10 DAYS PAY METHOD: CK#353  
 -----

QTY	MAKE	PRODUCT	DESCRIPTION	PRICE	EXTENSION
1	SER #	PENDING ASSIGNMENT	DRYER/ELECTRIC	329.00	329.00
	MAKE: PRG	MODEL#	TDE546RB		

-----  
 SUB TOTAL 329.00 TAX 26.32 DEL DISC TOTAL 355.32  
 -----

\*\*\* PAID IN FULL \*\*\*

T H A N K Y O U

---

## Appendix E: General Ledger

Acct #	Description of Account	Type of Account	
100	CASH ON HAND	11	
101	BANK ACCOUNT-OTHER	11	
102	CHECKING ACCOUNT	11	Interfaced
103	BANK ACCOUNT-OTHER	11	
104	ACCOUNTS RECEIVABLE	11	Interfaced
105	INSTALLMENT CONTRACTS A /R	11	Interfaced
109	NOTES RECEIVABLE	11	
110	NEW MERCHANDISE INVENTORY	11	
112	NEW APPLIANCE INVENTORY	11	Interfaced
114	NEW ELECTRONICS INVENTORY	11	
116	NEW FURNITURE INVENTORY	11	Interfaced
118	ACCESSORIES INVENTORY	11	
119	PARTS INVENTORY	11	Interfaced
120	USED MERCHANDISE INVENTOR	11	
122	USED APPLIANCE INVENTORY	11	
124	USED ELECTRONICS INVENTOR	11	
126	USED FURNITURE INVENTORY	11	
129	MISC. INVENTORY	11	
180	INVENTORY WASH ACCOUNT	11	
130	EQUIPMENT & TOOLS	12	
132	DEPRECIATION EQUIP & TOOL	12	
134	AUTO & TRUCKS	12	
136	DEPRECIATION AUTO & TRUCK	12	
138	FURNITURE & FIXTURES	12	
140	DEPREC. FURNITURE & FIXT.	12	
142	COMPUTER SYSTEMS	12	
144	DEPREC. COMPUTER SYSTEM	12	
146	PROPERTY & BUILDINGS	12	
148	DEPREC. PROPERTY & BLDG.	12	
200	ACCOUNTS PAYABLE	20	Interfaced
205	LAYAWAY	20	Interfaced
210	ACCOUNTS PAYABLE F/PLAN	20	
220	NOTES PAYABLE SHORT TERM	20	
230	SALES TAX PAYABLE	20	Interfaced
240	PAYROLL TAX PAYABLE	20	
250	OTHER DEDUCTIONS PAYABLE	20	
260	ACCRUED INCOME TAX	20	
270	NOTES PAYABLE LONG TERM	21	
280	EQUIPMENT CONTRACT PAYABL	21	
755	UNDELIVERED SALES	41	Interfaced
757	UNDELIVERED SALES TAX	21	Interfaced

Acct #	Description of Account	Type of Account	
300	CAPITAL STOCK	30	
310	ADDITIONAL PD IN CAPITAL	30	
320	DRAW ACCOUNT	30	
330	RETAINED EARNINGS	31	
340	CURRENT EARNINGS	31	
410	NEW MERCHANDISE SALES	40	
412	NEW APPLIANCE SALES	40	Interfaced
414	NEW ELECTRONICS SALES	40	
416	NEW FURNITURE SALES	40	Interfaced
418	ACCESSORIES SALES	40	
419	PARTS SALES	40	Interfaced
420	USED MERCHANDISE SALES	40	
422	USED APPLIANCE SALES	40	
424	USED ELECTRONICS SALES	40	
426	USED FURNITURE SALES	40	
429	MISCELLANEOUS SALES	40	
450	LABOR	40	Interfaced
460	DELIVERY	40	Interfaced
470	INTEREST (FINANCE CHARGE)	40	Interfaced
480	WARRANTY	40	Interfaced
700	INTEREST EARNED	41	
710	DISCOUNT TAKEN	41	Interfaced
720	BAD DEBT COLLECTED	41	
730	CASH OVER/SHORT	41	
740	SALES VOLUME REBATES	41	
750	MISCELLANEOUS INCOME	41	
510	NEW MERCHANDISE COST GDS	50	
512	NEW APPLIANCE COST OF GDS	50	Interfaced
514	NEW ELECTRONICS COST GDS	50	
516	NEW FURNITURE COST OF GDS	50	Interfaced
518	ACCESSORIES COST OF GOODS	50	
519	PARTS COST OF GOODS	50	Interfaced
520	USED MERCHANDISE COST GDS	50	
522	USED APPLIANCE COST GDS	50	
524	USED ELECTRONICS COST GDS	50	
526	USED FURNITURE COST GDS	50	
529	MISC. COST OF GOODS	50	
545	DISCOUNTS	50	Interfaced
550	LABOR COST	50	
560	DELIVERY COST	50	
580	WARRANTY COST	50	Interfaced

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Acct #	Description of Account	Type of Account
581	INVENTORY CGDS WASH	50
585	FREIGHT COST	50
586	APPLIANCE FREIGHT COST	50
587	ELECTRONICS FREIGHT COST	50
588	FURNITURE FREIGHT COST	50
590	MISC. COST OF SALES	50
610	MANAGEMENT SALARIES	60
612	SALES SALARIES	60
614	OFFICE SALARIES	60
616	OTHER SALARIES	60
620	NEWSPAPER ADVERTISING	60
622	RADIO ADVERTISING	60
624	YELLOW PAGES ADVERTISING	60
626	ALLOWANCE FROM MFG	60
628	MISC. ADVERTISING	60
629	TELEVISION ADVERTISING	60
632	DELIVERY EXPENSE	60
634	SERVICE EXPENSE	60
636	EQUIPMENT & TOOLS	60
638	MISCELLANEOUS EXPENSE	60
640	AUTO/TRUCK GAS & OIL	60
642	AUTO/TRUCK REPAIR & MAINT	60
644	LEASED EQUIPMENT	60
646	MISC. EXPENSE AUTO/TRUCK	60
650	TAXES-BUSINESS & CORP.	60
652	PAYROLL TAXES	60
654	RENT	60
656	UTILITIES	60
658	TELEPHONE	60
660	LEGAL EXPENSE	60
662	ACCOUNTING EXPENSE	60
664	POSTAGE	60
666	OFFICE SUPPLIES	60
668	DUES & SUBSCRIPTIONS	60
670	ENTERTAINMENT & MEALS	60
672	TRAVEL & HOTEL	60
674	BLDG REPAIR & MAINT	60
678	CONTRIBUTIONS	60
680	MISC OPERATING EXPENSE	60
760	INTEREST EXPENSE	60
770	LOSSES & BAD DEBTS	60
780	MISCELLANEOUS EXPENSE	60

## Appendix F

**MARKUP/GROSS MARGIN**

SwiftLink™ calculates prices automatically by “Percentage Mark Up”. For example, if an item cost \$100.00 and we want to mark it up 175%, the formula is as follows:

$$\text{Cost } (\$100.00) \times 1.75 \text{ (representing 175\% mark up)} + \text{Cost } (\$100.00) = \$275.00$$

This represents a “Gross Margin Percentage” of 63.64%.

The formula for calculating “Gross Margin Percentage” is as follows:

$$\text{“Gross Margin” } (\$175.00) \text{ divided by Selling Price } (\$275.00) = 63.64\%.$$

Listed below is a table for your convenience.

Cost	SellingPrice	Gross Margin	Mark Up	Gross Margin %
100	500.00	400.00	4.000	80%
100	476.20	376.20	3.762	79%
100	454.60	354.60	3.546	78%
100	434.80	334.80	3.348	77%
100	416.70	316.70	3.167	76%
100	400.00	300.00	3.000	75%
100	384.70	284.70	2.847	74%
100	370.40	270.40	2.704	73%
100	357.20	257.20	2.572	72%
100	344.90	244.90	2.449	71%
100	333.40	233.40	2.334	70%
100	322.60	222.60	2.226	69%
100	312.50	212.50	2.125	68%
100	303.10	203.10	2.031	67%
100	294.20	194.20	1.942	66%

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Cost	SellingPrice	Gross Margin	Mark Up	Gross Margin %
100	285.80	185.80	1.858	65%
100	277.80	177.80	1.778	64%
100	270.30	170.30	1.703	63%
100	263.20	163.20	1.632	62%
100	256.50	156.50	1.565	61%
100	250.00	150.00	1.500	60%
100	243.90	143.90	1.439	59%
100	238.10	138.10	1.381	58%
100	232.60	132.60	1.326	57%
100	227.30	127.30	1.273	56%
100	222.30	122.30	1.223	55%
100	217.40	117.40	1.174	54%
100	212.80	112.80	1.128	53%
100	208.40	108.40	1.084	52%
100	204.10	104.10	1.041	51%
100	200.00	100.00	1.000	50%
100	196.10	96.10	0.961	49%
100	192.40	92.40	0.924	48%
100	188.70	88.70	0.887	47%
100	185.20	85.20	0.852	46%
100	181.90	81.90	0.819	45%
100	178.60	78.60	0.786	44%
100	175.50	75.50	0.755	43%
100	172.50	72.50	0.725	42%
100	169.50	69.50	0.695	41%
100	166.70	66.70	0.667	40%
100	164.00	64.00	0.640	39%
100	161.30	61.30	0.613	38%
100	158.80	58.80	0.588	37%
100	156.30	56.30	0.563	36%
100	153.90	53.90	0.539	35%
100	151.60	51.60	0.516	34%
100	149.30	49.30	0.493	33%
100	147.10	47.10	0.471	32%

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Cost	SellingPrice	Gross Margin	Mark Up	Gross Margin %
100	145.00	45.00	0.450	31%
100	142.90	42.90	0.429	30%
100	140.90	40.90	0.490	29%
100	138.90	38.90	0.389	28%
100	137.00	37.00	0.370	27%
100	135.20	35.20	0.352	26%
100	133.40	33.40	0.334	25%
100	131.30	31.60	0.316	24%
100	129.90	29.90	0.299	23%
100	128.30	28.30	0.283	22%
100	126.60	26.60	0.266	21%
100	125.00	25.00	0.250	20%
100	123.50	23.50	0.235	19%
100	122.00	22.00	0.220	18%
100	120.50	20.50	0.205	17%
100	119.10	19.10	0.191	16%
100	117.70	17.70	0.177	15%
100	116.30	16.30	0.163	14%
100	115.00	15.00	0.150	13%
100	113.70	13.70	0.137	12%
100	112.40	12.40	0.124	11%
100	111.20	11.20	0.112	10%
100	109.90	9.90	0.099	9%
100	108.70	8.70	0.087	8%
100	107.60	7.60	0.076	7%
100	106.40	6.40	0.064	6%
100	105.30	5.30	0.053	5%
100	104.20	4.20	0.042	4%
100	103.10	3.10	0.031	3%
100	102.10	2.10	0.021	2%
100	101.10	1.10	0.011	1%
100	100.00	-	0.000	0%

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Appendix G

**COLUMN PRICE MARGIN MANAGER**

**Column Price Calculations**

Column Price Calculations is used for setting up the pricing for inventory (parts, hardware, serial, furniture, etc.) Here you can set up different retail prices from cost for various makes and product types.

Examples are:

MAKE	PROD	COL-1	COL-2	COL-3	COL-4	PRICE OVERRIDE
WCI	PTS	1.0				4.99

This example is telling the system that for all Frigidaire parts we will take the one lot cost and double it for our retail price. We are also saying that your lowest retail price is \$4.99.(If a part cost \$1.75, doubled would be \$3.50, but the price override will sell this part for \$4.99).

MAKE	PROD	COL-1	COL-2	COL-3	COL-4	PRICE OVERRIDE
ALL	ELE					29.99

This example is telling the system that for all makes, everything in your inventory master that has “ELE” (for elements) under Product Type, will sell for \$29.99.

MAKE	PROD	COL-1	COL-2	COL-3	COL-4
WHP	WSH		.29	.25	.22

This example is telling the system that column price 1 would default to suggested retail (manually typed in your serial master) for Whirlpool™ washers. Column 2 would be a 29% markup over cost, Column 3 would be a 25% markup over cost.

MAKE	PROD	COL-1	COL-2	COL-3	COL-4
WHP	DRY	.33	.30	.26	.20


This example is telling the system Column would be a 33% markup over cost, Column 2 would be a 30% markup, Column 3, a 26% markup and Column 4 a 20% markup.

MAKE	PROD	COL-1	COL-2	COL-3	COL-4
SNY	VCR	.29			

This example is telling the system a Sony® VCR's retail pricing is a 29% markup over cost. Set up your makes and products using the inventory you carry.


## PARTS COLUMN PRICE CALCULATIONS

This function is used to maintain a price matrix from cost without having to manually price parts in your inventory master.



1. From “**Column Price Calculations**” press the function key  to move to “**Parts Column Price Calculations**”. The cursor is now at “COL-2”.
2. You may now enter a common margin for all of your parts for column pricing 1, 2, 3, and 4. You can also have a minimum price.

CATEGORY	COL-1	COL-2	COL-3	COL-4	PRICEMINIMUM
89 or 93	1.0				9.95

This example is showing that the retail price for all parts will be double the cost, and the lowest price is \$9.95. You may or may not want to use this line.

3. To set your margins by different cost, leave column 1 blank and press  to reach the “Cost/List” field.

4. After “**IF**”, you must type in either **COST** or **LIST** and decide how you want your markup figured - from list price or distributors’ on-lot cost? (You can change this any time).

5. For practice type in **COST** and press the  key. The cursor is now at “.00”. Press the  key one more time.


6. The cursor is now under Maximum, type in **4.01**, press .

7. Fill in your matrix with the respective percentages. Note: this is for practice only. You should be familiar with this price matrix and have it filled in exactly how you want it before you go “live” with SwiftLink™.


PARTS COLUMN PRICE CALCULATIONS				
Categories	Col-1	Col-2	Col-3	Col-4 Minimum Price
<b>89 or 93</b>				<b>.00</b>
Cost / List	Min		Max	Pct
Ifis >	<b>.00</b>	and <	<b>4.01</b>	markup is <b>3.000%</b>
Ifis >	<b>4.00</b>	and <	<b>7.01</b>	markup is <b>1.500%</b>
Ifis >	<b>7.00</b>	and <	<b>15.01</b>	markup is <b>1.000%</b>
Ifis >	<b>15.00</b>	and <	<b>40.01</b>	markup is <b>.800%</b>
Ifis >	<b>40.00</b>	and <	<b>99999.00</b>	markup is <b>.500%</b>

## Appendix H

### HOW TO CREATE A WINDOWS® 95 ICON

- 1 Move your cursor to the center of the desktop, not on a present icon and click with your right mouse button. A box will appear with the options of “Arrange” “Icons”, “Move Icons”, “New”, and “Properties”. Select the “New” option. Another screen will appear, select the Shortcut option from this screen and press your left mouse button.
- 2 A Create Shortcut screen will appear with the “Command Line” field. Type in **C:\PARTS\SL.BAT** and click on next.
- 3 Select a title for the program. At this screen type, the word SwiftLink and then click on “Next”.
- 4 An icon symbol screen will appear, choose a temporary symbol using your left mouse button. After selecting the icon, press the “Finish” option.
- 5 Your new icon will appear on the desktop screen. Left click on the new icon to highlight and then right click. The system will produce a new screen with the following options “Open”, “Cut”, “Copy”, “Create Short Cut”, “Delete”, “Rename”, and “Properties”. Left click on “Properties”.
- 6 A “Properties” screen will appear with tabs or options displayed near the top of the screen. Click on the “Program” tab. At bottom of this screen there is a “Close On Exit” option (box). Move your cursor to the box and click with your left mouse key. A check mark should appear in this box.
- 7 On the same program screen left click on the “Change Icon...” rectangular box. Highlighted under “File Name” is the Icon you temporarily chose. Press the  key once to clear this. The cursor is now at the first character. In the text, type in

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**C:\PARTS\SLIICO** and press the  key. Left click on “OK” and you are back to the Program Tab. Left click on “OK” and your new SwiftLink™ icon will appear on your desktop screen.

8. On the same program screen left click on the “Advanced...” rectangular box. Make sure that the top two options have check marks in the available boxes. The two options are, “Prevent MS-DOS® -based programs from detecting Windows®,” and “Suggest MS-DOS® mode as necessary.” Left click on “OK” and you are back to the Program Tab. Again, left click on “OK” and your new SwiftLink™ icon will appear on your desktop screen.

#### **Choosing the size of your screen:**

- 1 Left click twice on the SwiftLink™ Icon. This will start the SwiftLink™ program. Once you are at the SwiftLink™ Main Menu move the mouse to the rectangular box on the upper left-hand side under SL-PENU. Left click on the down arrow symbol. Choose the size that best suits your screen. You can always go back and change the settings.