

Quick Start Guide #2





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INQUIRY

The SwiftLink™ main menu will either be displayed automatically, or it can be initiated manually.


If there is not a menu on your screen, simply type “SL” from the DOS prompt and press the  key. The main menu will appear.

The menu is designed to access a particular option when you move the cursor to the desired module and press the  key. The menu for that option will then be displayed on your screen.

To access the Product Inquiry menu, highlight that option on the SwiftLink™ main menu and press the  key.

The Inquiry module allows you to retrieve price and availability information for a given part and make from your inventory, distributor's inventory or full price books (if available). Type the desired number in the "Item Number" field and press the  key. The system will display the part's information.

DISTRIBUTOR				
[F12]-Mode Inventory				
Item Number: 95405	Make: WPL		Loc W	
On Hand 24				
Description	BELT	Rank A	Reserved	On Order 12
Retail 9.95	Dealer 5.97		Your Cost 3.95	
Dollar/Qty Breaks	3		12	
Special Prices	3.35		2.55	
(Stocking Locations)				

If there is more than one part that share the same number (different makes) or you have entered a partial part number, the program will produce a list of part numbers and their makes for you to select. Simply highlight the part number you were searching for and press the  key. This will display the part's information on the screen.

CUSTOMER/DISTRIBUTOR/PRICE BOOK: Once you have entered a part into the **INQUIRY** screen, the program searches for the part's information in your inventory files, then the distributor's files, and finally the full price book files. You may view the part's information through the **CUSTOMER** or **DISTRIBUTOR'S** screen. Listed below are the two ways to view the information while in the **INQUIRY** screen.

CUSTOMER SCREEN:

This screen will only display your inventory information about the part. It will show your quantity on hand (AVAIL) and the LIST (selling price) found loaded in the Inventory Master or calculated by the Column Pricing Setup table.

CUSTOMER			
[F12]-Mode Inventory			
Item Number: 95405	Make: WPL	Loc W	
		On Hand 24	
Description BELT	Rank A	Reserved	
		On Order 12	
Retail 11.95			

DISTRIBUTOR SCREEN:

The **DISTRIBUTOR** screen will show your distributor's information about the part (ranking, suggested list, dealer price, your cost, special pricing, etc.). The distributor's information is updated (price changes, use numbers, etc.) once a month except for the full price book files. If the information is being pulled from the price book file, the screen will display "Price Book".

Listed below is a brief description of the distributor's fields:

- Rank - **A** - **A** parts are normally stocked in every distributor location.
- B** - **B** parts are stocked in the majority of the distributor's locations.
- C** - **C** parts are stocked infrequently or only at certain distributor's locations.
- P** - **P** parts represent non-stock items, Full Price Book.

“On Hand” - Quantity on hand in your inventory.

“Reserved” - For Serial Inventory the Quantity sold by not delivered.

“On Order” - Quantity on order



“Retail” - Distributor’s Suggested list price

“Dealer” - The dealer’s normal price for the part. If the part is not found in the distributor’s file, the program will display the replacement cost loaded in your inventory master.

“Your Cost” - Your cost for the part. This price may vary from the dealer price because of discounts you may receive from the dealer.

“Qty. Break” and “Special Pricing” - These two fields will display any quantity breaks or special pricing offers by your distributors.

“This Part Stocked in the Following Locations” - Indicates in which distributors locations the part is normally stocked.

NOTE: A flashing “**SUB**” in the right hand corner indicates that the part has a substitutes part loaded in the substitute file. To view the sub information, press the   (Sub) key.

CUSTOMER vs. DISTRIBUTOR SCREEN - When you first enter the **INQUIRY** screen, the program will produce the **CUSTOMER** screen. After entering the part number, this screen will display your list price and quantity on hand.

To view the distributor information, press the **ESC** key after the part information has been displayed in the **CUSTOMER** screen. The program will produce the **DISTRIBUTOR'S** screen with that part's distributor information displayed (suggested list, dealer cost, etc.).

The **ESC** key allows you to toggle between the two screens. To return to the Customer screen, press the **ENTER** key.

If you wish to have the **DISTRIBUTOR's** screen appear when you first enter the **INQUIRY** screen instead of the **CUSTOMER** screen, press the **ALT F1** (Key Assignment) key. The **ALT F1** key allows you to determine which screen you wish to view first. (See below for detail information on the Key Assignment feature.)

PRICE BOOK SCREEN:


The Price Book file is made up of the distributor's normal inventory plus non-stock parts that the distributor can order from the part manufacturers. Due to the large size of this inventory file it is only updated periodically. Unlike the distributor's file, the Full Price Book inventory will not always show the most current price for the part. This screen will only appear when the program doesn't find the part in your inventory or the Distributor's file.

PRICE BOOK			
[F12]-Mode Inventory			
Item Number: 285521	Make: WPL	Loc W	
On Hand			
Description BELT	Rank P	Reserved	
On Order			
Retail 15.22	Dealer 9.38	Your Cost 9.38	


Rank: The “Rank” field will display a **P** to indicate that this part information is being pulled from the Price Book file.

Use Number: If the part number entered has a “use” number associated with it, the “use” number with its pricing information will automatically be displayed with a message that it is the replacement for the original number.

Partial Part #: This feature is handy when only a portion of the part number is known. The system will provide a list of parts and their part numbers that are numerically closest to the partial number entered. It will list parts found in your inventory, the distributor’s and the full price book.

EXAMPLE: You know the part number starts with 1-1 but you are not sure of the make of the part. Enter 1-1 in the “Part” field and press the  key. The system will search for the part number and give you a list of parts that start with 1-1 and those that are greater.

Inventory Selection		
Part #	Make	Description
1-17786	CHR	Block 40036
1-45936	CHR	Knob White
1-88R3602	W-R	Catalog N/C






Descriptive Inquiry: If you don’t know the make, part number or partial part number for the part you are seeking in your inventory, Don’t give up! You can still search for a part by using an one-word description. Simply enter an asterisk (*) in the “Item number” field followed by partial description. The program will produce a list of parts that contain the descriptive word you have entered. To select a part from the list, simply highlight the desired part and press the  key. The program will return you back to the **INQUIRY** screen, which is now filled with the selected part’s information.







NOTE: Descriptive inquiry will only check your inventory files, not the distributor's inventory or the full price book files.


EXAMPLE: If you looking for a belt, type in a "*" followed by the word "BELT" in the "Part Number" field (*BELT). The program will give you a list of parts that contain the word BELT in their description.


If you type in *BE the same list will come up plus anything else with BE in it like bearing.



Function Keys Available

	Inquiry Function Key Assignment
	Help
	Place On Order
	Short Cuts
	Exit

 **Key Assignment** - The Inquiry Function Key Assignment option allows you to set which key,  or , the **INQUIRY** Screen will use to display your inventory or the distributor's inventory information. For your inventory information to appear on the **INQUIRY** screen by using the  key, highlight the "Enter" field on the **KEY ASSIGNMENT** screen and press the  key. To set the **INQUIRY** screen to display the distributor's inventory information highlight the "Esc" field on the **KEY ASSIGNMENT** screen and press the  key.

NOTE: If you have set your **INQUIRY** screen to display your inventory information, the **INQUIRY** screen will pull up your inventory quantity and your list price only. You can still access the distributor's inventory information from the **INQUIRY** screen by pressing the  key.

You can access the distributor's inventory information from the **INQUIRY** screen by pressing the  key.

 **Place on order** - The  key will take the part number displayed on the **INQUIRY** Screen and place that part on the Special Order File in **Create/Receive PO's**.












This will be Added to the Special Order File!


Quantity of this Item to be Ordered __



Reference


Type in quantity you want to place on the special order file. You also have 2 lines of reference for who the part is for.

F5 SHORT CUTS

SUBSTITUTIONS	
SERIAL BY MODEL	
MODEL NUMBER LOOKUP	
SERVICE HISTORY	
SERIAL ALL MODELS	
STOCKING LOCATIONS	
INVENTORY NOTES	
CUSTOMER SALES	
FURNITURE	
PERSONAL CALENDAR	
POS NOTES	





Highlight to select the option you want and press the  key


Once you learn the  keys you may press the  - Function Key from the **INQUIRY** Screen.


 **Substitutions** - While viewing a part in the **INQUIRY** screen, you may notice the word “**SUB**” flashing in the lower right corner of the screen. This indicates you have established a substi-

tution for this part. Press the  key to view the substitution file.




A **SUBSTITUTION** screen will be displayed listing the subs for the part. The items displayed on this screen were previously established in Input Substitutions (located under Inventory Adj's - Adjustments).

Once the  key is pressed and the substitute items are displayed, you may  or  to select one of the options. Select the substituted part and press the  key to return to the **INQUIRY** screen filled with the substituted part's information.

 - **Serial by Model** - The Serial Inventory Inquiry lets you view available or sold serial items by model number.

 - **Model Inquiry** - This screen gives you the ability to lookup the “quick reference” parts of a model. Admiral, Frigidaire, General Electric, Gibson, Jenn Air, Kelvinator, Kitchen Aid, Magic Chef, Maycor, Roper, Tappan, Westinghouse, and Whirlpool model information is available for your SwiftLink™ program.

Once you press the  key, the system will display the **MODEL NUMBER LOOKUP** screen.


The next step in looking up a model is to enter the make (GEH, WPL, etc.) in the “Make” field and the appropriate model number or a portion of that model number with any extensions at the end. A **MODEL SELECTION** screen will overlay with the cursor on Add New Model. At this time you can Add a new model number or use your  and  keys to select the model number you are searching for. Once selected, press the  key. The program


will list the quick reference parts for the model.

MODEL NUMBER INQUIRY		
Make WPL	Model # LA5500XKW1	Description
Card Loc 576 E 1		
Part #	Description	Price Information
Add Additional Parts to Model Number		
363633	AGITATOR & INSERT AS	63.99
350956	ALMOND	11.38
72107	ALMOND PAINT, TOUCH	7.70
91073	BALL, SUSPENSION (6)	4.86
16033	BEARING, DRIVE PULLEY	9.24
21258	BEARING HINGE	2.14
95405	BELT, "V"	11.95
96384	BLOCK, DRIVE	9.66
93770	BUMPER, RUBBER	1.48
350532	CAM, BAR SPIN	15.12
<hr/>		
F-3 Descriptive Search	F-5 Print	F-10 Exit




Price - The prices listed for each part are pulled in the following order.


- 1) First, the program looks for a price loaded in the Part's Inventory Master (Selling Price 1).
- 2) If no price is found in the Inventory Master, the program will display the price calculated from the Inquiry Pricing table.
- 3) Next, the system will display the distributor's list found in the Distributor's file.
- 4) Finally, if the program is unable to pull up a price from the previous attempts, it will produce the list price from the full price book.


To select a part from the **MODEL INQUIRY** screen after the model's parts are displayed, highlight the part by moving your cursor up or down and pressing the  key. The parts are listed alphabetically, you may use the page down and page up keys to locate the specific part number. The program will then transfer the part information to the **INQUIRY** screen.

To narrow down the search for a part, enter the make and model number as normal and then press the  key to type in a one word or partial description of the part in the "Description" field. The program will return the screen with all parts for the model, which have the descriptive words embedded somewhere in its parts description.


Example:


Type in **GEH** for General Electric and press the  key.
Type in **WWA8300** in the model number field and press the  key.
In the Model selection screen select **WWA8300BAL** and press the  key.


Press the function key the  key for Search.

In the "Descriptive Search" field type in **TIM** (Partial for timer) and press the  key.

MODEL NUMBER INQUIRY			
Make	GEH	Model #	WWA8300BAL
		Description	TIM
		Card Loc	182A2-A12
Part #	Description	Price	Information
Add Additional Parts to Model			
WH12X644	MOTOR TIMER	81.34	
WH12X631	SWITCH PANEL TIMER A	80.64	
END OF PARTS SELECTION		[F10]-EXIT	

You may select a part from the screen by highlighting it and pressing the  key.

If the system is unable to locate the model number entered, it will display a list of model numbers closest to the number entered that are available for selection. To select a model from the **MODEL SELECTION** list, highlight the model with your cursor by scrolling up or down and pressing the  key. The model number will be transferred automatically from the list to the **MODEL NUMBER INQUIRY** screen.

To view the Model Selection list without entering a model number, simply press the  key (Model Select) from the **MODEL NUMBER INQUIRY** screen. It will display all models that are available beginning with the first model number in the file. This is helpful when you only have a partial model number or no model number.



MODEL NUMBER INQUIRY												
Make:	Model #:	Description										
Card Loc												
Part #	Description	Price	Information									
<table border="1"> <thead> <tr> <th colspan="1">MODEL SELECTION</th> </tr> <tr> <th>MODEL #</th> </tr> </thead> <tbody> <tr> <td>11-1153-01</td> </tr> <tr> <td>11-1153-02</td> </tr> <tr> <td>11-1153-03</td> </tr> <tr> <td>11-1153-04</td> </tr> <tr> <td>11-1153-05</td> </tr> <tr> <td>11-1159-01</td> </tr> <tr> <td>11-1159-02</td> </tr> </tbody> </table>				MODEL SELECTION	MODEL #	11-1153-01	11-1153-02	11-1153-03	11-1153-04	11-1153-05	11-1159-01	11-1159-02
MODEL SELECTION												
MODEL #												
11-1153-01												
11-1153-02												
11-1153-03												
11-1153-04												
11-1153-05												
11-1159-01												
11-1159-02												
F1 Help	F8- Model Select	F10-Exit										


ALT F6 - **SERVICE HISTORY** - The **SERVICE INQUIRY** screen allows you to inquire into a customer's service history.


ALT F7 - **SERIAL ALL MODELS** - The **SERIAL INVENTORY INQUIRY** screen lets you view all available serial items by model number.


ALT F8 - **STOCKING BY LOCATIONS** - The **ALT F8** key will show you your inventory by locations for the part displayed in the **INQUIRY** screen.

ALT F9 - **INVENTORY NOTES** - enters the Note system. From here you can write any notes or comments pertinent to the displayed part number. Remember you must have entered a part number on the **INQUIRY** screen before pressing the **ALT F9** key. A flashing red "NOTE" in the lower right corner of the **INQUIRY** screen indicates that a note is present.

 - **CUSTOMER SALES** - Type in an account number here and all the associated invoices will appear. Highlight to select the invoice you want to view and press the  key. This screen is the same as the **RECALL** screen from **Point of Sale**.







 - **FURNITURE** - The Furniture Inquiry by Frame lets you type in a Make and Frame number to view all available or sold item numbers.

 - **PERSONAL CALANDER** - The personal calendar lets you set up you own appointments from a calendar year.


 - **POS NOTES** - This option allows you to view the Point of Sale note attached to the displayed item's Inventory master record.


POINT of SALE

Using the Keyboard


- The  key takes you to the next field
- The  arrow key takes you to the previous field
- The  key saves the information
- The  key exits the screen
- The  (escape) key clears the screen
- Caps Lock should always be on. Everything in SwiftLink™ should always be in uppercase (capital letters)
- Numbers - when ever you are typing in a number that ends with .00 all you have to do is type in the whole number as (10) then press  and SL will automatically place a .00 after the number

Creating an Invoice


Step 1: From the main menu select **Point of Sale** and press the  key.




Step 2: The cursor is now at “Acct #” field. Type in a 7 digit telephone number or press the  key to bring up the Customer Profile Name Search. To set up an account complete the following steps:


New Account Setup

NAME: In the name field type the customer's name (Last name,first name), and press the  key until the cursor is moved to the "Address1" field. The reason to type in the Last name first is so you can use the customer search (Its easier to search by last name than first names). The comma tells the system, when printing to reverse the names and leave a space where the comma is.


Address1 Type in an address and press the  key


Address2 This is used for P.O Box or Suite # or Apt. #. Press the  key to the next field.


City/St Type in an abbreviation code or a "?" to see what you have already setup. Use your  key to select the city and press the  key. Notice how fast the City, State and Zip code are filled in. Press the  key to save the customer information and you are right back at **Point of Sale**.


Step 3: After the account is set up the cursor is now at the "Bill to #" field. If you press the  key the Accounts Receivable will be billed to the customer account. If you want to bill this invoice to a third party you can type in another account number now.



Step 4:The cursor is now at the "Dept#" field. The department stands for which profit center is this sale coming from. You can

press the  key to pass this field or put in a “?” to add or see what has been set up. This field is directly related to the Sales Analysis Report sorted by department.


Step 5: At the “SLS#” field type in your sales number or initials. If they have not been set up you can add them now or press the  key past this field.


Step 6: “PO/Nar#” field. This is for a PO number or Narda number press the  key past this field.




Step 7: The “TaxCd” field is your tax code field. If you are delivering to a different taxing authority than at your store you can type in the appropriate code for that tax rate or type in a “?”, to see what has been set up. You can also type in NON for a non-taxable sale. Press the  key after this field.



Step 8: The “Ad” field is for advertising. This is where you can ask the customer where they heard about you and track the different advertising media you use. Type in a 2 letter abbreviation or a “?” to add a new code, or use the  key to select the code of your choice. Press the  after your selection.


Assigning a Serial Number


Step 9: Qty” - Type in 1 unless you are selling 2 or more of the same model # to a customer. Press the  key to the “Make” field.

Step 10: “Make” - Type in the abbreviation you have set up for the make you are going to sell. After you type in a 3-letter make the cursor will automatically go to the “Product Number” field. If you do not know the make you can press the  key past this field and go to the “Product Number” field.


Step 11: “Product Number” - Type in the Model Number you wish to sell and press the  key. If you have completed the “Make” field you will be brought to the **SERIAL SELECTION** screen. If you did not complete the “Make” field you will be brought to the **SELECTION TYPE** screen. Use your  key to highlight **Serial** and press the  key.



Step 12: **SERIAL SELECTION** Screen - The model number you typed in is highlighted with **<Apply Serial # Later>**, use the  key to select the serial number for the corresponding model number. Press the  key to select.


Step 13: “Price” - You are now brought back to the **Point of Sale** screen with the cursor on price. If you need to overwrite the price you can do so at this time or press the  key to the next field.

Step 14: The cursor is back at the “Qty” (Quantity) field. If you want to type in another line item go back to step 9. If you press the  key from here you will be taken to the “Del” field.


Step 15: “Del” - This is to charge for delivery. If you want to


charge a delivery fee type in a dollar amount here. If you don't charge a delivery fee or have included it in the sale then press the  key.




Step 16: “Disc”- This stands for discount. This field allows you to give a discount to a customer on the total bill after taxes. If you want to give a discount to a customer before taxes use the  discount option. Otherwise press the  key.


Step 17: “Tax”- Your default or customer tax rate should appear calculated out. Press the  key to **Method of Payment**.


Selling a Model Number Only


Step 9: “Qty” - Type in 1 unless you are selling 2 or more of the same model number to a customer. Press the  key to the “Make” field.


Step 10: “Make” - Type in the abbreviation you have set up for the make you are going to sell. After you type in a 3-letter make the cursor will automatically go to the “Product Number” field. If you don't know the make you can press the  key past this field and go to the “Product Number” field.



Step 11: “Product Number” - Type in the Model Number you wish to sell and press the  key. If you have completed the “Make” field you will be brought to the **SERIAL SELECTION** screen. If you did not complete the “Make” field you will be brought to the **SELECTION TYPE** screen. Use your  key to highlight **Serial** and press the  key.


Step 12: **SERIAL SELECTION** Screen - The model number you typed in is highlighted with **<Apply Serial # Later>**, press the  key to select.

Step 13: “Price” - You are now brought back to the **Point of Sale** screen with the cursor on price. If you need to overwrite the price you can do so at this time or press the  key to the next field.


Step 14: The cursor is back at the “Qty” (Quantity) field. If you want to type in another line item go back to step 9. If you press the  key from here you will be taken to the “Del” field.


Step 15: “Del” - This is to charge for delivery. If you want to charge a delivery fee type in a dollar amount here. If you don’t charge a delivery fee or have included it in the sale then press the  key.




Step 16: “Disc”- This stands for discount. This field allows you to give a customer a discount on the total bill after taxes. If you want to give the customer a discount before taxes then use the  discount option. Otherwise press the  key.





Step 17: “Tax”- Your default or customer tax rate should appear calculated out. Press the  key to **Method of Payment**.


Selling a Model Number not in Inventory


Step 9: “Qty” - Type **1** in unless you are selling 2 or more of the same model # to a customer. Press the  key to the “Make” field.


Step 10: “Make” - Type in the abbreviation you have set up for the make you are going to sell. After you type in a 3-letter make the cursor will automatically go to the “Product Number” field. If you don’t know the make you can press the  key past this field and go to the “Product Number” field.



Step 11: “Product Number” - Type in the Model Number you wish to sell and press . The **SERIAL SELECTION** screen will appear. Use your  key to select **Serial** and press the  key.


Step 12: SERIAL SELECTION Screen - The model number you typed in is highlighted with <Special Order - Apply Serial # Later>, press the  key to select. As the model number is not in your inventory the cursor is at the “Description” field. Type in the description now and press the  key. Because this is a special order, the special order screen appears with the make, model number, and description filled in. The cursor is at the “Quantity” field, type in a 1 here and press the  key. Type in the color and press the  key when you are finished.

Step 13: “Price” - You are now brought back to the **POINT OF SALE** screen with the cursor on price. Type in the selling price and press the  key to the next field.




Step 14: The cursor is back at the “Qty” (Quantity field). If you want to type in another line item go back to step 9. If you press the  key from here you will be taken to the “Del” field.



Step 15: “Del” - This is to charge for delivery. If you want to charge a delivery fee type in a dollar amount here. If you don’t charge a delivery fee or have included it in the sale, then press the  key.



Step 16: “Disc”- This stands for discount. This field allows you to give a discount to a customer on the total bill after taxes. If you want to give a customer a discount before taxes then use  discount option. Otherwise press the  key.



Step 17: “Tax”- Your default or customer tax rate should appear calculated out. Press the  key to **Method of Payment**.



Method of Payment


Cash Only, Checks Only, Credit Card, and Split Methods are to be used when the invoice is paid in full. If you selected a payment and pressed the  key by mistake you can press the  (Escape) key to bring you back to the **Method of Payment** screen. The Function key  will return you back to the invoice if you need to add or change something.



Cash Only- If the customer is paying cash select this method. The cursor will be at the “Amount Tendered” field. If the cash amount is exact you do not have to type anything in this field. You can press the  key now. The only time you would want to type in an amount is when the customer is giving you more cash than the total due. If you type in a higher figure than the total due SwiftLink™ will show the customer’s change. Press the  key when finished.

Check Only- If the customer is paying by check select this method. The cursor will be at “Check Number” field. Type in the number on the check that the customer is giving you. Press the  key. The “Check Amount” is already filled in. “Approval Number” is only used if you are using a check approval company. Type in the approval number that telecheck would give you in this field. When you are finished press the  key.

Credit Card - If the customer is paying with a Credit Card select this method. The cursor will be at “Card Name” field. Type in MC or VISA. Press the  key after each field. Fill out as much information as necessary. Press the  key when you are finished. If you are using a POS keyboard, when you swipe the card through, all the information will appear in the appropriate fields.

Split - If the customer is paying some in cash, some in a check or some on a credit card select this method for payment. The cursor will be at the dollar amount for the “Cash” field, type in the cash amount or press the  key to go to the “Check” field. Type in the check number, the amount and press the  key to the “Credit


Card” field. When you are finished press the  key. If you did not add correctly you will get an error sign and the cursor will be at the “Cash” field.

On Account - If the customer is giving you a partial payment or not paying anything at all and wants to be billed use this option. This will be your store account or store charge. The cursor is at “Downpayment” field, type in the amount of downpayment the customer is giving you and press the  key. If the customer is giving you a check type in the “Check Number” field, if they are giving you cash type in the word “CASH”, or if they are using a credit card for the downpayment type in MC or VISA. Press the  key when you are finished.

COD - This option allows you to collect a down payment and then collect the remaining balance at the time of delivery. In addition, Cash On Delivery will be printed on the bottom of the sales invoice.

No Charge - Select this method if the sale is No Charge but you want to deduct the items from inventory.

Estimate - Select this option if you are creating an estimate for the customer. The print out will say Estimate instead of Invoice at the bottom. You can always recall an estimate and turn it into a sale.

Layaway - Select this method if this is a layaway sale. The cursor is at “Downpayment” field, type in the amount, press the  key. then type in the check number, cash, or for credit card type in MC or VISA.

Rental Contract - Select this method if this is to be on a rental contract.













Installment Contract - Select this option if you wish to transfer this sale to an installment Contract. You must have purchased the

Instllment Contract Module to use this option.











F10-Return to Invoice - Select this option if you want to return to the sales invoice without selecting any of the above options.

After the method of payment you will be shown the invoice number and prompted to print the Invoice No or Yes.

Applying a Serial Number


From the main menu select **Point of Sale** and press the  key. Press the  key to recall. Type in invoice you want to recall and press the  key OR press the  key and a list of all invoices will appear with the latest one at the top. Use your  key to select the invoice you want to recall and press the  key. After recalling the invoice, look at the bottom of the screen for the  key “Apply Serial / Item#”. Press the  key. A window will appear with the model number you are applying a serial number to, press the  key. You now have a choice to add a serial number that you have not put into inventory yet or select the correct serial number that was delivered. Highlight your selection and press the  key, and the “Date Delivered” window will appear. If the date delivered (which is today’s date) is correct press the  key. If the date delivered is different type in the date and press the  key.

Exchanging a Serial Number

From the main menu select **Point of Sale** and press the  key. Press the  key to recall. Type in invoice you want to recall and press the  key OR press the  key and a list of all invoices will appear with the latest one at the top. Use your  key to select the invoice you want to recall and press the  key. After recalling the invoice, press the  key for Exchange Serial Number. The **SERIAL NUMBER EXCHANGE** window will appear with the location, make, model, and serial number. Select the serial number you want to exchange and press the  key. You are now at the **SERIAL SELECTION** screen. You now have a choice to add a serial number that you have not put into inventory yet or select the correct serial number that was delivered. Highlight your selection and press the  key and you will be brought back to the **INVOICE** screen. Press the  key to return to the main menu.

Creating a Credit Memo

For Parts / Items

Follow the same steps as creating a new invoice. Make sure you are duplicating the same information as the original invoice. The only difference will be when you get to the “Price” field. At the “Price” field, type in a (-) minus first, then the price. Press the  key. Your Sub Total will show a negative number along with the tax. For method of payment of payment select the same payment you used on the original invoice. This will automatically put the parts back into inventory and adjust your Invoice Register.

For Model / Serial Numbers

Follow the same steps as creating a new invoice. Make sure you are duplicating the same information as the original invoice for the top portion.

“Qty” - Type in the number you have on the original Invoice

“Make” - Type in the Make you have on the original Invoice

“Product Number” - Type in the Serial Number that you sold






SELECTION Screen - Select Serial

“Description” - This will show *Item already sold*



“Price” - Type in the same Price with a (-) minus sign in front, press the  key

Method of Payment- Select the same as the original Invoice.

Recalling An Invoice, Estimate, OR Layaway

From the **Point of Sale** screen press the  key to Recall. You now have a choice of  Recall an Invoice,  Recall an Estimate, or  Recall a Layaway. If you know the Invoice, Estimate, or Layaway number type in the number and press the  key. If you want a review screen, press the function key above the Invoice, Estimate, or Layaway option.

Invoicing

The last Invoice number will appear. Use the  key to select the invoice you want to bring up and press the  key. You cannot edit a closed Invoice. When you are finished with the Edit Invoice

option press the **F10** key to exit.

F4 Estimates

The Last Estimate number will appear. Estimates start with a 9 million number. Use the **↓** key to select the Estimate you want to bring up and press the **ENTER** key. Here you can edit and create a new estimate. When you are finished with the Estimate option press the **F10** key to exit.

F5 Layaways


The Last Layaway number will appear. Layaways start with an 8 million number. Use the **↓** key to select the Layaway you want to bring up and press the **ENTER** key. You can void a Layaway by pressing the **F8** key or from the **Fix It Shop**, and then create a new Layaway for the customer. To print out a Layaway that is on the screen, use the **ALT F2** keys. When you have completed the task press the **F10** key to exit.



Finalizing a Layaway


After the Layaway has been paid off, through **Layaway Payments**, from the **Point of Sale** recall the customer's layaway. Press the **ENTER** key or the **F2** key from the **LAYAWAY** screen to Method of Payment. Cash is already selected, press the **ENTER** key. (The Layaway has already been paid off, so there is no cash amount to enter.) Press the **F2** key and the Layaway will be turned into an invoice with the Prompt, **Print Invoice No or Yes**. Once the Layaway is turned into an invoice, the sale will be on your Invoice Register, Sales Analysis, and if you are integrated with General Ledger, all the proper debits and credits will apply.

SERVICE PARTNER

Create a Service Ticket

Step 1: In the “Ticket #” field, you can either press the  key to have SwiftLink™ automatically assign a ticket number or you can enter a number manually.

Step 2: If you know the “Account #”, enter it. Otherwise, press the  key and a **CUSTOMER PROFILE NAME SEARCH** pop-up window will appear for you to select the appropriate customer or highlight “* * * **Add a New Customer** * * *” and press the  key.

Step 3: The “Bill To #” field is to be used when you would want to bill another party, (i.e., a warranty call for Whirlpool.) The “Bill To” would be Whirlpool. Otherwise, press the  key to place the customer as the “Bill To” number.

Step 4: The cursor automatically fills in the “Call Date”, with the current system date. The cursor then moves onto the “Ad Code” field that designates the ad that the customer found to call you for the service call. If you cannot remember the various ad codes, then place a question mark or a code that is not defined and the **AD CODE SELECTION** pop-up window will appear. Please verify that the code is not pre-defined but uses another abbreviation before creating a new code. Place the initials of the person who took the service call in the “Agent” field

Step 5: The cursor then moves to the “Trouble Reported” field to allow for a description of the trouble. The description can be up to three lines of 40 characters per line. However, while typing, SwiftLink™ does not word wrap.

Step 6: An **EQUIPMENT SERVICED** pop-up window will appear for you to input the following information:

Make: You can enter the abbreviation of any of your vendors or you will have up to 12 characters

Product: You can enter the abbreviation of any of your product abbreviations or you can have up to 15 characters

Model #: You will have up to 15 characters

Mfg #: You will have up to 12 characters

Serial #: You will have up to 15 characters

You can enter up to three items needing service.

Step 7: The “Technician” field allows for assignment of this service call. This field can be left blank and filled in at the time of finalizing this service ticket.

Step 8: The “Scheduled Date” field is where you will place the date for the service to take place.

Step 9: The “Scheduled Time” field is the time that the service person will be there to perform the service task.

Step 10: The “Type of Call” field consists of two character pre-defined codes. This will also print on the service ticket. The following are the pre-defined call type selection codes:

CD: C.O.D.	CH: Charge	CN: Contract
DL: Delivery	ES: Estimate	HR: Home Repair
IN: Install	PU: Pick Up	SR: Shop Repair

SV: Service Call **WA:** Warranty

If the “**WA**” warranty code is used, a pop-up window will appear displaying the next NARDA number available for use. The program will state, “Your last number this session was: a number,” followed by, “Do you want a new number assigned?” Simply answer “Y”es or “N”o. If answer “Y”es, the NARDA number will be transferred to the NARDA form, to the **Point of Sale** screen “PO/Nar#” field and to the Service Ticket.

Step 11: The “C/B” field allows you to track your call backs. The selected code will print on the service ticket under the “Date of Order” field printed on your service ticket. The following are the pre-defined call back type selection codes.


- | | |
|------------------------------|----------------------------|
| 1 - Not Home | 5 - Need Assistance |
| 2 - Reroute for Parts | 6 - Inc. Repair |
| 3 - P/U Shop Call | 7 - No Contact |
| 4 - Refused Service | 8 - Other Explain |

Step 12: The “Urgent Call (Y)” field allows you to mark a particular service call as priority. By placing a “Y” in this field the system will automatically make this a priority one call. Otherwise, leave this field blank.




Step 13: The “Map/Sort Code” field is for the map code associated with customer’s location.





Step 14: The “PO#/Narda#” field allows you to keep track of a customer’s PO number or the PO number associated with the parts ordered fo this customer. Whatever you enter in this field will be reflected in the **POINT OF SALE** screen in the “PO#Narda” field.

Step 15: The “Print Service Ticket” field is defaulted for “Y”es and will print as soon as you finish completing the service ticket. In addition, the “History” field will allow you to print the service history of the customer. However, this field is defaulted to “N”o.


Step 16: Press the  key to update this record.


Dispatching:

To dispatch a service call, simply press the   keys or press the  key and select the **Dispatching** option from the **SERVICE TICKET** screen. The **Service Dispatching** option allows you to manipulate the open calls in various ways. For example; you can keep the service calls open, you can close any open service call, you can place them on parts hold, or you move the open call to a shop call.

The first screen to appear is a calander. Your cursor is highlighting today's date, based on the computer system's date. The calander is displayed for an entire month. To give you a "snapshot" of the amount of calls scheduled for that day SwiftLink™ displays a number within the specific day. If you press the  key the display will be all open calls for all "techs" for that specific date. If you want to change the date simply use your  or  keys. Highlight the desired date and press the  key.


It is possible to display the open calls for a specific date or all open calls for a specific tech. Simply follow the steps below.

Step 1: The "Date" field allows you to either view service tickets for a specific date or, if you want to see all open service tickets, simply type "ALL", then press the  key.


Step 2: The "Tech" field allows you to either view the service tickets for a specific technician or, if you want to see all the service tickets for all technicians, simply type ALL, then press the  key.

This will display all open calls on the **SERVICE DISPATCHING**

screen for the selected criteria.

To see all the codes for the “status” field press the  key. To review the various options:


Blank	Open Calls	S	Shop Calls
P	Parts Hold	I	Parts In
X	Completed		


To classify a particular call, simply place the appropriate status code in the “Status” field and press the  key. This will remove the call from the **SERVICE DISPATCHING OPEN CALL** screen and add the call to the newly defined status call list.

Another feature of the “Stat” field is that the program will automatically group your open calls by date and then by technicians. Within the date and technician groupings, the service calls will be prioritized by time (earliest to latest calls).


If you would like to prioritize your calls, simply number your calls in the order that you wish to view then (1,2,3, etc.) in the “status” field. The **SERVICE DISPATCHING** screen will only prioritize the calls within each date. This allows you to rearrange the calls for each day.



Open Calls: The **OPEN CALLS** screen is the defaulted filter for viewing service call records.


Shop Calls: Shop calls are service calls that are repaired in the “Shop” or in-house. To place a call in the Shop status, enter an “S” in the “status” field and press the  key. This will remove the call from the “Open Calls” screen and transfer it to the **SHOP CALL**


screen. To view all your shop calls press the  key. The **Call Selection** pop-up window will appear and select **Shop Calls**.


Parts/Hold Calls: You would use this option when a technician has worked on the appliance but must order parts to complete the job. The purpose of this option is to allow you to view all of your calls that are waiting for parts to arrive before they can be completed.


To place a ticket on Parts/Hold status, place a “P” next to the service ticket and press the  key. This will remove the call from the **OPEN TICKET** screen and place it in the “Parts/Hold” category.



To view all your Parts/Hold calls press the  key. The “Call Selection” pop-up window will appear and select “Parts Hold” option and press the  key. The program will display the **PARTS HOLD** screen. You have the option of selecting the date and technician but the system will default to “ALL” for both the “Date” and “Tech” fields.

Once the part arrives, you can put the service ticket back into the **OPEN CALL** screen by spacing through the “P” in the “Status” field and pressing the  key.

Note: When a service ticket has been placed on Parts/Hold status, you have the option to assign what parts are on order for each call. From the **PARTS/HOLD CALLS** screen place your cursor on the ticket that you need to order parts for and press the  (Assign Parts) key. This will bring up the **PARTS ON ORDER** pop-up screen. In this screen the “Ticket #” and “Date” fields are automatically filled in by the system. Your cursor will be under the “Qty” field, please enter the quantity, make, part number, and the description of the part on order for this particular service call.


Press the  key to update this record.



Parts in Calls: These are service calls that are on Parts/Hold status for which you have received the required parts to finish the service call. To transfer the service ticket from “Parts Hold” status to “Parts In” status, display the **PARTS/HOLD CALLS** screen and move your cursor to the desired service ticket and type an “I” in the “Stat”us field. Press the  key and the service ticket will be transferred from the **PARTS/HOLD CALLS** screen to the **PARTS IN CALLS** screen.


To view all your **PARTS IN CALLS** screen press the  key. The “Call Selection” pop-up window will appear and select “Parts In” option and press the  key. The program will display the **PARTS IN** screen. You have the option of selecting the date and technician but the system will default to “ALL” for both the “Date” and “Tech” fields.


Completed Call: When the technician has repaired the appliance but not yet returned to the shop with the paper work, it is considered a “Completed Call”. **REMEMBER:** that the service call is still considered open until you finalize the service ticket through the service invoicing option.


The purpose of this option is to allow you to view the remaining calls a technician may have at any given point in the day. By marking the service call as a “Completed Call” the system will remove this service call as an “Open Call”.


To place the service ticket in question in the “Completed Calls” category, simply place an “X” in the status column beside the completed call. Press the  key and the call will be removed from the **OPEN CALLS** screen.

To view all your **COMPLETED CALLS** screen press the  key. The “Call Selection” pop up window will appear, then select the **Completed** option and press the  key. The program will display the **COMPLETED CALLS** screen. You have the option of selecting the date and technician but the system will default to “ALL” for both the “Date” and “Tech” fields.

Once the technicians have returned from their completed Service Calls, you are then ready to finalize all the service calls completed or change their status to some other status than “Open Calls”. We have discussed how to change a service ticket from one status to another status, but to finalize a service ticket you place your cursor on the specific service ticket and press the  (Select) key. The **SERVICE TICKET INPUT** screen will be displayed. The following fields require information entry:



“Service Performed” 40 Characters per line and three lines for explanation of the type of service performed by technician. If you can not remember what model was repaired, simply press the  (Recall Model) key.




There are places for two days and times. You will need to complete the “Date” field, and press the  key. The “Time In” and “Time Out” are fields that you simply type the time without the colon dividing the hour from the minutes. The program will figure the total time on that service call


Your cursor will move to the “Technician” field. Input the technician who actually did the final work. However, if you need to list all the technicians who participated in this service call, press the  key.

The “Purchase Date” and “At” fields will need to be completed. The “Mileage” field will require the mileage of the service call. This is important for reimbursements from warranty work.



The “Tech \$ Received” field is for the amount of money the technician received at the service call. This will not effect your accounts receivable.

Step 3: Press the  (Update & Invoice) key. This will take you to the **SERVICE INVOICING** screen to complete the service ticket and to charge the labor and parts cost. Press the  key to update and finalize the service ticket.

Notepad/Directions: The notepad will allow you to enter and review notes concerning a customer, service project, or directions to a customer’s house. There are two ways to access this option in the Service Partner, either through the  (Inquiry) key or, the   key combination.

Once you are in the **NOTEPAD** screen, your cursor is on the first space on the first line, simply start typing your message or directions then press the  (Update) key.

If you type an “*” as the first character in a line, the line of information will print on the open Service Ticket. Up to three lines will print on the open ticket.

While in the **SERVICE TICKET INPUT** screen, an existing note will be indicated by the flashing word “NOTES” on the screen. To view the note, press the   keys.

Blank Service Ticket: There are two ways to access the blank service ticket option in the Service Partner, either through the **F5** (Inquiry) key or, the **ALT F5** key combination. The program will display a pop up window requesting you to input the desired number of blank service tickets desired and then press the **F2** (Update) key.

Service History: There are two ways to access the service history option in the Service Partner, either through the **F5** (Inquiry) key or, the **ALT F6** key combination. The program will display the **SERVICE INQUIRY** screen and the only information you will need is the account number.

Customer Inventory: There are two ways to access the “Customer Inventory” option in the Service Partner, either through the **F5** (inquiry) key or, the **ALT F7** key combination. The program will show all the customer’s serviced inventory, including the make, model number, description, serial number, and year purchased. If you want to view any of the notes associated with a particular inventory item simply highlight it and press the **ENTER** key. To exit from the **Customer Inventory** screen press the **F10** key.

Service Ticket Notes: There are two ways to access the “Service Ticket Notes” option in the Service Partner, either through the **F5** (Inquiry) key or, the **ALT F9** key combination. The program will display any notes associated with the current service ticket. To exit press the **F10** key.

Customer Sales: There are two ways to access the “Customer Sales” option in the Service Partner, either through the **F5** (Inquiry) key or, the **ALT F10** key combination. The program will show

the **CUSTOMER SALES HISTORY** screen and the only information you need is the account number. To view an invoice, simply highlight it and press the **ENTER** key. To exit from the **CUSTOMER SALES** screen, simply press the **F10** key.

Personal Calendar: There are two ways to access the “Personal Calendar” option in the Service Partner, either through the **F5** (Inquiry) key or, the **ALT F12** key combination. The personal calendar defaults to the “New User” and you can keep track of appointments or service calls by assigning each person a calendar. Once you place a cursor on the first day of the week select the **F2** (Explode Week) key. To add an appointment, simply press the **F2** (Add) key. Input the date, time, name, and comment, then press the **F2** (Add) key again.

Reports:


To find the reports that are important for the Service Partner select the “Reports & Statements” menu option, then select “Service Partner Reports” and there will be the following list:

Ad Analysis by Code	Service Ticket Averages
Ad Analysis by Product	Service Ticket Report
CFC/Refrigerant Usage Report	Technician Commission
Customer History Report	Technician Productivity
Dispatching Report	Unused Ticket Listing
History by “Bill To”	Service History by Model
Parts on Order Ticket Report	Technician Costing Report
Service Cash Report	Projected Sales Report
Service Invoice Analysis	

NARDA/NESDA


The Wizard has assisted you in completing all the required information to successfully use all of SwiftLink™'s modules.

NARDA (North American Retail Dealers Association) can be accessed two ways” the first is through the main menu at the “Warranty” menu option, and the other avenue is through the Service Partner.


Let's review accessing NARDA through the “Warranty” menu option from the main menu. First highlight the “Narda/Nesda Warranty” menu option, and press the  key. This menu has five options, “Input Narda Info”, “Print Narda Forms”, “Delete Complete Forms”, “Narda Form Inquiry”, and “Outstanding Forms Rprt”. We will discuss each option in its order.








First select the **Input Narda Info** option; a blank NARDA warranty input screen will appear.

The first field on the form is the “Form Number” field. This number is required when creating a NARDA record. The number can be up to 10 characters (Alphanumeric) in length. You may enter the NARDA form number from a preprinted NARDA form in this field or let the system assign a NARDA number.


If you wish to modify or “inquire” into a form already completed, enter the form number in the “Form Number” field and press the  key. The record's information will display.

Print Narda Forms:

The “Print Narda Forms” option is designed to let you run a batch print job of all of the NARDA tickets that have been flagged to print. Most companies do not have a dedicated printer for NARDA forms. To print a form, the person has to remove the current paper stock, align the continuous NARDA form, print the form, remove the continuous NARDA forms, and r-align the regular paper stock. To avoid this hassle, SwiftLink™ will print all the NARDA tickets that have been flagged to print at one time, perhaps at the end of the day. To select this option make sure that the continuous NARDA forms are properly aligned and select the **Print Narda Forms** option on the menu. A pop-up window will appear called the “PRINT NARDA FORMS”, it states, “This option prints all NARDA forms that have not previously printed. To reprint a form, simply change the print indicator to a “P”. <<Press the  key to cancel printing>>”.

Your options along the bottom of the screen are  (Help),  (Update),  (Form Alignment), and  (Exit). Press the  to verify the alignment of the forms, than press the  to Update. When the printing is completed, press the  key to exit.

Delete Complete Forms:

This option will delete all NARDA forms that have been marked “completed”. A completed form is one on which the money amount has been paid by the vendor/supplier and has been marked as closed through the  option on the **NARDA FORM IN-QUIRY** screen. Once this option has been activated, the only way you will get the information is by the audit trail report that will be printed.

NARDA Form Inquiry:

The NARDA form inquiry will display all pending NARDA forms. A pending form means that you have not finalized the request with the manufacturer. If you would like to view a particular line item in detail, simply press the **F4** key. A pop-up window stating, “Enter the line number of the NARDA Form to be exploded:” and press the **F2** key. You will immediately see the previously completed NARDA input screen for the line item you requested.

All NARDA forms, once created, are considered pending until you press the **F6** key to complete the warranty transaction. After pressing the **F6** key, a pop-up window will appear requesting the line number associated with the NARDA form that is now considered complete. Press the **F2** key to update that record. Once the NARDA form is completed it will not show up on the **PENDING NARDA FORM INQUIRY** screen.

If you closed a NARDA form by mistake, simply go into the **INPUT NARDA INFO** screen and place the form number in the first field, and press the **ENTER** key. At this time you can change the “Print Flag” option from “C” to “P” and press the **F2** key to update. Then select the **PENDING NARDA FORM INQUIRY** menu option, and it will appear among the pending NARDA forms listed.

Outstanding Forms Report:

The purpose of this report is to give you a quick list of pending NARDA forms based on any given date. This report can either be printed from your printer or displayed on your terminal screen. From the pop-up window enter the desired date and whether you want the report sent to your printer or to your screen.

The report gives you the form number, date of the form, type, authorization, and the customer's name.

. . . through Service Partner:

The second avenue of completing a NARDA form is through the Service Partner menu option. Once you have entered the general information concerning the customer, the trouble needing attention, equipment serviced, technician, and scheduled date and time. You will need to respond to the "Type of Call" field with the "WA" option for warranty code, a pop-up window will appear displaying the next NARDA number available for use. This program will state that "Your last number this session was: a number:, followed by, "Do you want a new number assigned? No or Yes." At this point, you need to respond with a "Y" for yes. Another, smaller pop-up window will appear requesting information concerning the purchase date and the location where the item was purchased. Then, the pop-up window will be replaced by another pop-up window verifying who will be responsible for the "Parts Bill To:" and the "Labor Bill To:"

Follow the regular procedure to complete the service ticket and press the **F2** key to update and invoice. Once you are in the **SERVICE INVOICE** screen, notice how the system automatically completed the “PO/NA#” field. Once you have completed this invoice, press the **F2** key to Update and Continue. The system will transfer you into a 95% completed NARDA Input screen. You will have to simply complete the few remaining fields to complete the NARDA form.

If you are planning on initiating your NARDA tickets from the Service Partner, then we recommend using the blank numbered NARDA forms to allow SwiftLink™ to print in the appropriate number from the bank of numbers you received from NARDA. The form number for non-preprinted NARDA number forms is #360-6WIN. NARDA forms and the bank of numbers may be ordered directly from NARDA by dialing 800-242-8678.

