


## Quick Start Guide #3



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## PURCHASING

**Step 1:** Select **Create/Receive PO's** from the main menu and press the  key. A pop-up window appears with the following options:

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

For the purpose of training, we are going to **Create Purchase Orders** for each of the three categories of inventory (i.e., Inventory, Serial Inventory, Furniture Inventory). Then we will edit each of the previously created purchase orders. The next step will be to **Print A Purchase Order Receiving Document to Receive An Existing Purchase Order** into our warehouse. We will then cover the last option, **Transmit / Send A Purchase Order**.


### Create or Edit a Purchase Order



Select **Create Or Edit A Purchase Order** from the purchasing menu and press the  key. The first field to complete is the "Supplier" field. This is where you will need to enter the supplier code for the merchandise you are going to order. The next field is the "Enter PO number or ? for a list of POs". At this point you can either enter the PO number on a preprinted purchase order or allow SwiftLink™ to assign automatically a purchase order number. To allow Swiftlink™ to assign the purchase order number automatically, simply type a **?** or press the  key and select the option **Auto Assign PO #**.




The next section is strictly for **Create or Edit a Purchase Order**. There are two questions for you to answer. First, “Would you like to add from the special order file?” *N* or *Y*. Secondly, “Do you want to automatically generate this PO?” *N* or *Y*.




<u>Field Name</u>	<u>Inventory</u>	<u>Serial</u>	<u>Furniture</u>
Make	WPL	WPL	BAS
Item	95405	LA5800SN	1500
Type	Inventory	Serial	Furniture
On Hand	Leave Blank	Leave Blank	Leave Blank
Description	Completed	WASHER	SOFA
EOQ	Skipped	Skipped	Skipped
Fabric 1	N/A	N/A	B52D
Fabric 2	N/A	N/A	B36
Color	N/A	N/A	GREEN
Quantity	12	6	6
Cost	Completed	369	500
Freight	N/A	N/A	50
\$ or %	N/A	N/A	\$
Discount	Leave Blank	\$10.00	Leave Blank
Reference	Leave Blank	Leave Blank	STOCK
Qty Mtd	Leave Blank	Leave Blank	Leave Blank
Qty Ytd	Leave Blank	Leave Blank	Leave Blank
Order Total	Automatic	Automatic	Automatic


## **Inventory**


**Step 1:** From the Main Menu select the menu option **Create/Receive PO's** and press the  key.



**Step 2:** In the “Supplier” field, type **WPL** and press the  key. If this is the first time you have used this supplier, a “Supplier Selection” pop-up window appears anticipating the input of either an alpha or alphanumeric supplier code. (Be advised that this supplier code is the vendor supplier number for the accounts payable feature of SwiftLink™.) If you are unsure of the vendor’s code, type a **?** in this field and press the  key. A listing of your current suppliers will be displayed.



**Step 3:** If your Vendor is new then press the  key for new Vendor. Notice that the WPL is underneath the “Supplier” field. Press the  key again and type **WHIRLPOOL** then press the  key.

**Step 4:** Currently the cursor is highlighting the end of the sentence that states, “Enter PO number or ? for a list of PO’s” field. Press the  key; notice another pop-up menu with the option of <Auto Assign Purchase Order #>. Press the  key to allow the system to assign the PO number, then press the  key to continue.

**Step 5:** In the “Make” field, type **WPL**. At the “Item” field, type **95405** and press the  key. Since you have the local distributor’s inventory file, the system pulled that information and displayed it in the appropriate fields on your screen. Also notice that the “Cost” field is filled in and at this particular time you may overwrite the cost.

**Step 6:** In the “Quantity” field, type **12**, and press the  key.


**Step 7:** Press the  key until you are at the “Reference” field. At this field you could document the customer or sales invoice associated with this part. Now press the  key to Update.



**Step 8:** Note at the bottom of the screen that this order’s total is \$30.60, which is the cost (\$2.55) multiplied by the ordered amount (12). Press the  key to review your PO. Press the  key to return to the purchase order.




**Step 9:** A pop-up window will appear asking, “Are You Ready to Close this Purchase Order?” *N* or *Y*. If *Yes* is chosen, you will not be allowed to add to this PO.




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## Serial Inventory


**Step 1:** From the Main Menu, select the menu option **Create/Receive PO's** and press the  key.


**Step 2:** In the “Supplier” field type **WPL** and press the  key. If this is the first time you have used this supplier, a “Supplier Selection” pop-up window appears anticipating the input of either an alpha or alphanumeric supplier code. (Be advised that this supplier code is the vendor supplier number for the accounts payable feature of SwiftLink™.) If you are unsure of the vendor’s code, type **?** in this field and press the  key.

**Step 3:** If your Vendor is new, press the  key for new Vendor. Please notice that the WPL is underneath the “Supplier” field. Press the  key again and type **WHIRLPOOL** and press the  key.

**Step 4:** Currently the cursor is highlighting the end of the sentence that states, “Enter PO number or ? for a list of P.O.’s” field. Press the  key; notice another pop-up menu with the option of <Auto Assign Purchase Order #>. Press the  key to allow the system to assign the PO number automatically, then press the  key to continue.



**Step 5:** In the “Make” field, type **WPL** At the “Item” field, type **LA5800SN** and press the  key. If this is a new serial inventory item the **SELECTION TYPE** pop-up menu will appear listing the three types of inventory; inventory, serial inventory, and furniture. Select **Serial** and press the  key.



**Step 6:** In the “Description” field type **WASHER** and press the  key.

**Step 7:** In the “Quantity” field type **6**, and press the  key.

**Step 8:** In the “Cost” field type **369** and press the  key.


**Step 9:** In the “Discount” field we are going to put **\$10.00** as if you are getting a SPA.


**Step 10:** Press the  key and you are at the “Reference” field. At this field you could document the customer or sales invoice associated with this part. Now press the  key to Update.

**Step 11:** Please note at the bottom of the screen that this order’s total is \$2,154.00, which is the cost (\$369.00) multiplied by the ordered amount (6) with a discount of \$10.00 each. Press the  key to review your PO. Press the  key to return to the purchase order.




**Step 12:** A pop-up window will appear asking, “Are You Ready to Close this Purchase Order?” *N* or *Y* If *Yes* you will not be allowed to add to this PO.




### **Furniture Inventory:**


**Step 1:** From the Main Menu select the menu option **Create/Receive PO’s** and press the  key.


**Step 2:** In the “Supplier” field, type **BAS** and press the  key. If this is the first time you have used this supplier a “Supplier Selection” pop-up window appears anticipating the input of either an alpha or alphanumeric supplier code. (Be advised that this supplier code is the vendor supplier number for the accounts payable feature of SwiftLink™.)

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**Step 3:** Press the  key for new Vendor. Please notice that the BAS is underneath the “Supplier” field. Press the  key again and type **BASSETT** and press the  key.



**Step 4:** The cursor is currently highlighting the “Enter the PO number or? for a list of P.O.’s” field. Press the  key; notice another pop-up menu with the option of <Auto Assign Purchase Order #>. Press the  key to allow the system to assign automatically the PO number, and now press the  key to continue.

**Step 5:** In the “Make” field, type **BAS**. At the “Item” field, type **1500** and press the  key. Since you have previously established the inventory master file, the system pulled that information and displayed it in the appropriate fields on your screen. Notice that “Fabric1”, “Fabric2”, and “Color” are blank. Also notice that the “Cost” and “Freight” fields are filled in. At this particular time you may overwrite the “cost” and “freight” fields.

**Step 6:** In “Fabric1” field type **B52D**, in “Fabric2” field type **B36**, in the “Color” field type **GREEN**, and press the  key.




**Step 7:** In the “Quantity” field type **6**, and press the  key.

**Step 8:** Press the  key until you are at the “Reference” field. At this field type **STOCK** and press the  key. Now press the  key to Update.



**Step 9:** Please note at the bottom of the screen that this order total is \$3,000.00, which is the cost (\$500) multiplied by the ordered amount (6). Press the  key to review your PO. Press the  key to return to the purchase order.

**Step 10:** A pop-up window will appear asking, “Are You Ready to Close this Purchase Order?” **N** or **Y** If **Y**es you will not be allowed to add to this PO.






### Receive an Existing Purchase Order

**Step 1:** From the main SwiftLink™ menu, highlight **Create/Receive PO's** and press the  key. Press the  key to highlight **Receive an Existing Purchase Order** and press the  key.

**Step 2:** Type the appropriate supplier code and press the  key

**Step 3:** Type an appropriate P.O. number or press the  key with a blank field, and the system will show you all the open and close POs for a supplier. If you did not type the number in the field, highlight the appropriate PO number and press the  key.

### Step 4: (Inventory)

Type the invoice in the field if you know it and press the  key. You have the option to accept or change the qty, cost, etc. Now press the  key through the first line item. Then press the  key. A red window appears. If you want to update, press the  to highlight **Y** and press the  key.

### Step 5: (Serial)

This is the same as for Inventory, plus you have the following fields to fill in:

- 1) Serial number
- 2) Color
- 3) Floor Planned (Y/N)
- 4) Floor Location
- 5) Individual Cost

**Note:** SwiftLink™ checks to ensure that you only enter the number of serial numbers you said you received, and also prevents double entry of a serial number.





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### **Step 6:** (Furniture)

This is the same as for Inventory, plus you have the following fields to fill in:

- 1) Color
- 2) Fabric 1
- 3) Fabric 2
- 4) Floor Location
- 5) Floor Planned
- 6) Item Cost & Freight Cost

### **Transmit / Send a Purchase Order**

**Step 1:** If you said **Yes** to close the PO and pressed the  key, you are now back at the option window. If you are ready to transmit this order (parts only), highlight **Transmit/Send a Purchase Order** and press the  key. Ensure that the proper supplier code is in the “Supplier Code” field and the proper PO number is in the “Enter PO number or? for a list of PO’s.” field. Now press the  key. A red window appears asking if you are sure you want to proceed. Answer **Yes** and press the  key.

Note: You will be notified if the order was properly transmitted.

### **Print Purchase Order Receiving Doc**

Each type of inventory will print a receiving document in a different format. There are similarities between the Inventory and Furniture Inventory receiving documents because they both will require verification that a certain quantity of an ordered item was shipped. The person receiving it, would either check the appropriate line or write in the total number received. This is your physical record of what came in on a specific shipment.

However, with the Serial Inventory, the major difference is the space provided for the person receiving the items to write the respective serial numbers and verify that the quantity shipped is the same as the quantity ordered.


## INVENTORY

### Inventory Interfaces

Inventory interfaces with **Point of Sale**, **Accounts Receivable**, and **General Ledger** (if the General Ledger Interface is turned on).

**Inventory** (Parts, Hardware, and Any Items Other than Serialized, or Furniture)





### Adding New Inventory (Also Edit Inventory)




**Step 1:** From the Main Menu, select **Inventory** and press the  key.

**Step 2:** You have a choice of 3 Inventories to choose from:




**Inventory**  
Serial  
Furniture

Inventory is already highlighted, press the  key.



**Step 3:** The Cursor is at the “Number” field. The upper left mode  shows **INVENTORY**. By pressing the  key you can change the inventory selection in the upper right Location defaults to **W** for Warehouse. If you need to change the “Location” field, use your up arrow key to get to the “Location” field. Type in the part number here and press the  key. Type in the desired location and press the  key.


**Step 4:** The highlighted line now shows the part number with <Press enter to Add This Item> If you made a mistake, press the  key, otherwise press the  key. If you want to check or edit the item, highlight it and press the  key.

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**Step 5:** If the part is in the distributor's inventory, the appropriate make will appear. If you want to change this type in the Make or the Vendor abbreviation you have already set up for this part number. If you are not sure what you have set up press the  key at the blank field. You now have a choice, either use your  to select the appropriate abbreviation, or press the  key to add a new make.



**Step 6:** (Optional New Make)



If you press the  key on new make, type in the 3 letter abbreviation you want to use and the cursor will move to the brand name. Type in the vendor's name that corresponds to that abbreviation and press  key.


**Step 7:** You are now at the **INVENTORY MASTER** screen with the cursor at the "Description" field. If the part is from the distributor's inventory the description is already filled in. If the description is not filled in, you either typed an invalid part number, or you have typed a part number that is not stocked by your distributor which you want to put into inventory. If the latter, type in the description and press  key.



**Step 8:** The cursor is now at the "On Hand" field. Type in the amount you have in stock.



**Step 9:** The Cursor is at the "Repl. Cost"(Replacement Cost) field. If the part is from your distributor, the "DI Cost" (Dealer Cost ) field is filled in and the "Repl Cost" is blank. Leave this blank and press  key.

**Step 10:** The Cursor is at the “Prod Type”(Product Type) field. Type in the product type code for the description. If you are not sure of the product codes, type a ? and press the  key. Use your  key to select the product type already set up or add a new one. For most parts type in PTS.


**Step 11:** After pressing the  key, the **CATEGORY SELECTION** pop-up screen will appear prompting you to choose if this is a Taxable or a Non-Taxable Part. *Taxable Part* is already highlighted; press the  key.

**Step 12:** The Cursor is at the “N/S” field ( Non Stock or Stock) with *S* for stock already defaulted. (The only time you would want to change Stock to an *N* for Non-stock is when the part number is obsolete, or you choose to no longer stock the item. By using the *N*, the part number will not appear as an inventory selection at **Point of Sale**.) When adding new parts always press the  key past this field with the *S*.

**Step 13:** The cursor is at the “Selling Price 1” field. If you are using the margin manager, the margin manager selling price 1 is filled in. If you want to change margins press the  key. If you want to overwrite the Margin Manager type a price here. If you want to use the Vendor retail price (if this part/item is in your distributor’s file) leave this field blank and press the  key.

**Step 14:** “Minimum”....Press the  key until the cursor is at the “Minimum” field. This field is optional. For reordering purposes, you may enter a minimum number for this specific inventory number. Type the number and press the  key.

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**Step 15:** “Maximum”....The cursor is now at the “Maximum” field. This is also an optional field. For reordering purposes, you may want to enter a maximum number for this specific inventory number. Type the number and press the  key.

**Step 16:** “Eoq”.... “Eoq” stands for Economic order quantity. The cursor is now at the “Eoq” field. This is also an optional field. This field is also used for reordering. Examples for a specific inventory number are as follows:

**Example #1**


Minimum = 2  
Maximum = 12  
Eoq = 0  
On Hand = 1  
On Order = 0

If you generated an auto P.O. with SwiftLink™, the system would recommend that you order eleven (11). Maximum (12) minus (-) On Hand (1) minus (-) On Order (0) = 11.

**Example #2**


Minimum = 2  
Maximum = 12  
Eoq = 6  
On Hand = 1  
On Order = 0


If you generated an auto P.O. with SwiftLink™, the system would recommend that you order six (6). Maximum (12) minus (-) On Hand (1) minus (-) On Order (0), but not more than Eoq (6) = 6.


**Step 17:** “UOM”...(Units of Measure). The word to describe how something is packaged (i.e., ea for each). For our purposes let’s skip this option by pressing the  key.

**Step 18:** “Pos Notes”....You can enter a number code (01 to 99) to designate a specific POS Note. Type the numeric code in the field, and a window pops up allowing you to enter a note which will appear on the POS screen at time of invoicing.


**Step 19:** “Bin”....Bin Location... is more for non-furniture inventory (ie., parts)

**Step 20:** General Ledger....Inventory....This is the general ledger inventory asset account which is credited (credited for the cost) when you sell this frame inventory item number. If you want the default account in the General Ledger Interface control to be credited, leave this field blank and press the  key.


**Step 21:** General Ledger....Cost of Goods....This is the general ledger cost of goods account which is debited (debited for the cost) when you sell this inventory item. If you want the default account in the General Ledger Interface control to be debited, leave this field blank, and press the  key.

**Step 22:** General Ledger....Sales....This is the general ledger sales/income account which is credited (credited for the selling price) when you sell this inventory item. If you want the default account in the General Ledger Interface control to be credited, leave this field blank, and press the  key.


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When you are finished press the  key. NOTE: The “On Order”, “Last Cost”, and “Average Cost” fields are handled by the program. The reserved field does not apply to Inventory for parts. The “On Order” field tells you if you have the item on order, and how many you have on order. “Last Cost” and “Average Cost” are self explanatory.

### **Edit Inventory**


**Step 1:** From the main menu, highlight **Inventory** and press the  key.

**Step 2:** From the **SELECT DESIRED INVENTORY**, choose **Inventory** and press the  key.

**Step 3:** Type the Inventory number in the “Number” field and press the  key.

**Step 4:** If you typed a number that has an inventory master, that inventory number is now highlighted. Press the  key. If the system did not find an exact match, find the appropriate number and press the  key.

**Step 5:**

Make the necessary corrections and press the  key to update.

**Function Keys for INVENTORY INQUIRY Screen.**

**F1 Help**....This is the Help Document.

**F5 Selection Criteria**....This allows you to change the criteria to “look up” inventory. These options are self-explanatory. **S** is Sold, **A** is available, and **B** is Both.

**F9 Notes**....This function key will let you see, change or add notes to a specific Inventory item.

**Function Keys for INVENTORY MASTER..**

**F1 Help**....To obtain the Help Document.

**F2 Update**....To update, press the **F2** key to update the record.

**F5 Repeat**....To add the same part number to another location, press **F5**. The cursor will be in the Location Field.

**F6 Margin Manager**....To set up an individual margin manager for an item.

**F7 History**....To show sales/order history for the past twelve (12) months.

**F8 Delete**....To delete an item from inventory. Use with great discretion.



**F9 Notes**....To check, add, or change notes.

**F10 Exit**....To return you to the **INVENTORY INQUIRY** Screen.

**PgUp/PgDn**...Self-Explanatory.

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## Inventory Reports


From the main menu, highlight **Reports & Statements**. Press the  key to “Inventory Reports”, and press the  key.

### Serial (Inventory)

Serialized Inventory Interfaces with **Point of Sale, Accounts Receivable, and General Ledger** (if the General Ledger Interface is turned on).

For Serialized Inventory (ie. appliances, electronics, etc.)





### Adding New Serial Inventory (or Editing Serial Inventory)



**Step 1:** From the Main Menu select **Inventory** and press the  key.




**Step 2:** You have a choice of 3 Inventories to choose from:

Inventory  
**Serial**  
Furniture



Use your  key to select **Serial** and press the  key.


**Step 3:** The Cursor is at the “Number” field. The upper left mode  shows **SERIAL**. By pressing the  key you can change the inventory selection in the upper right “Location” field is defaulted to **W** for Warehouse. If you need to change the Location, use your  key to get the “Location” field. Type in the Model number here and press the  key.


**Step 4:** The highlighted line now shows the model number with <Press Enter to Add This Item> If you made a mistake press the  key, otherwise press the  key. If you want to check or edit the model, it will come up automatically.



**Step 5:** Type in the Make or the Vendor abbreviation you have already set up for this model number. If you are not sure what you have set up, press the  key at the blank field. You now have a choice, either use your  key to select the appropriate make or press the  key for new make.

**Step 6:** (Optional New Make)

If you press the  key on new make, type in the 3 letter abbreviation you want to use and the cursor will move to the brand name. Type in the vendor name for that abbreviation and press the  key.

**Step 7:** You are now at the **SERIAL INVENTORY MASTER** screen with the cursor at the “Description” field. Type in the description and press the  key.



**Step 8:** The Cursor is at the “Repl. Cost” (Replacement Cost) field. Type in the replacement cost and press the  key.


**Step 9:** The Cursor is at the “Prod Type” (Product Type) field. Type in the product type code for the description. If you are not sure of the product codes, type in a ? and press the  key. Use your  key to select the product type already set up or add a new one.



**Examples:**



WSH	- Washer
DRE	- Dryer, Electric
DRG	- Dryer, Gas


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**Step 10:** After pressing the  key, the **CATEGORY SELECTION** pop-up screen will appear prompting to choose if this is a **SERIAL ITEM** or a Non-Serial Item. Serial is already highlighted, press the  key. (The reason you may choose to select Non-Serial is to keep items in the serial inventory that do not have a serial number, like range hoods etc.)

**Step 11:** The Cursor is at the “N/S” field ( Non Stock or Stock) with *S* for stock as the default. (The only time you would want to change a Stocking model number to a N for Non-stock is when the Model number is obsolete and you have sold all the related serial numbers. By using the N, the model number will not appear as an inventory selection at **Point of Sale**.) When adding a new model number always press the  key past to accept *S* as the default.

**Step 12:** “Selling Prices”....The cursor is now at Selling Price 1. Type your retail price and press the  key. You have the option of adding up to four (4) selling prices. If you set up “Margin Manger” for this specific Make and Product Type, Margin Manager pricing would appear in the appropriate fields. You can also set up a margin manager for this specific item if you so desire, by using  (Individual) Margin Manager.

**Step 13:** “Minimum”....Press the  key until the cursor is in the “Minimum” field. This field is optional. For reordering purposes, you may enter a minimum number for this specific model number. Type the number and press the  key.

**Step 14:** “Maximum”....The Cursor is now at the “Maximum” field. This is also an optional field. For reordering purposes, you may want to enter a maximum number for this specific model number Type the number and press the  key.

**Step 15:** “Eoq”...(Economic order quantity) The cursor is now at the “Eoq” field. This is also an optional field, and it is also used for reordering. As examples, for a specific model number:

**Example #1**

Minimum = 2  
Maximum = 12  
Eoq = 0  
On Hand = 1  
On Order = 0

If you generated an auto P.O. with SwiftLink™, the system would recommend that you order eleven (11). Maximum (12) minus (-) On Hand (1) minus (-) On Order (0) = 11.

**Example #2**

Minimum = 2  
Maximum = 12  
Eoq = 6  
On Hand = 1  
On Order = 0


If you generated an auto P.O. with SwiftLink™, the system would recommend that you order six (6). Maximum (12) minus (-) On Hand (1) minus (-) On Order (0), but not more than Eoq (6) = 6.

**Step 16:** “POS Notes”....Point of Sale Notes. You can enter a number code (01 to 99) to designate a specific POS Note. Type the numeric code in the field, and a window pops up allowing you to enter a note which will appear on the POS screen at time of invoicing.


**Step 17:** “Bin”...(Bin Location) is more for Parts Inventory


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
**Step 18:** General Ledger...(Inventory)....This is the general ledger inventory asset account which is credited (credited for the cost) when you sell this model number and assign a serial number.


**Remember,** the inventory account is not credited until you assign the serial number. If you want the default account in the General Ledger Interface control to be credited, leave this field blank and press the  key.


**Step 19:** General Ledger...(Cost of Goods)....This is the general ledger cost of goods account which is debited (debited for the cost) when you sell this model number and assign a serial number.



**Remember,** the inventory account is not debited until you assign the serial number. If you want the default account in the General Ledger Interface control to be debited, leave this field blank, and press the  key.

**Step 20:** General Ledger...(Sales)....This is the general ledger sales/income account which is credited (credited for the selling price) when you sell this model number, whether a serial number is assigned or not. If you want the default account in the General Ledger Interface control to be credited, leave this field blank, and press the  key.


**Step 21:** The system now prompts you to add serial numbers, type the letter **Y** or use the  key and press the  key.

**Step 22:** Serial Number....Type in the complete Serial number and press the  key.


**Step 23:** “F-Loc”...(Floor Location) Type the location where this serial number is located. Examples are WH for Warehouse, FL for Floor, or EWH for East Warehouse. Press the  key. Remember, floor location is not the same as Location.




**Step 24:** “Color”...The last letters of a model number are usually the color. For easy reference, type in the color and press the  key. If there is no color as in TV’s or Stereo’s, press the  key past this field.

**Step 25:** “F/P”....(Floor Plan) This is defaulted to *N*, if these serial numbers are floor planned type in a *Y*.


**Step 26:** “Dt Rec”....(Date Received) Type in the date received. If you press the  key, today’s date will appear.

**Step 27:** “Grace”....This is a number field for how many days until the due date. Type in 30, 60, 90, or 365 for 1 year.

**Step 28:** “Cost”....This is taken from the replacement cost on the master screen. Press the  key if it is the same or type in a new replacement cost.


**Step 29:** Type in another serial number and press the  key. Everything is repeated for easy keying. The cursor is in the “F-Loc” field. If it’s the same press the  key and add another serial number. If you need to go back to a field press the up arrow key. When you are finished press the  key and you are brought back to the “Number” field and ready to add a new model number.

### **Edit Serial (Inventory)**




**Step 1:** From the main menu, highlight **Inventory** and press the  key.

**Step 2:** From the **SELECT DESIRED INVENTORY**, choose **Serial (Inventory)** and press the  key.




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**Step 3:** Type the Model number in the “Number” field and press the  key.


**Step 4:** (Edit the Master File)


If you typed in a model number that you have an inventory master for, that model number is now highlighted. If you want to edit the master file, press the  key. If the system did not find an exact match, find the appropriate model number and press the  key. Make the necessary corrections and press the  key to update.


**Step 5:** (Edit a Serial Number)

If you typed in a model number that you have an inventory master for, that model number is now highlighted. Press the  key to the appropriate serial number and press the  key. Make the desired corrections and press the  key to update.

### **Function Keys for INVENTORY INQUIRY Screen**

 **Help**....This is the Help Document.

 **Selection Criteria**....This allows you to change the criteria to “look up” inventory. These options are self explanatory. S is Sold, A is available, and B is Both.

 **Notes**....This function key will let you see, change or add notes to a specific Inventory item.

**Function Keys For SERIAL INVENTORY MASTER.**

**F1 Help**....This is the Help Document.

**F2 Update Add Serial**....When you are through, press the **F2** key to update the record.

**F5 Repeat**....If you want to add the same part number to another location, press the **F5** key. The cursor will be in the “Location” Field.

**F6 Margin Manager**....You can set up an individual margin manager for an item.

**F7 History**....This will show sales/order history for the past twelve (12) months.

**F8 Delete**....This will allow you to delete an item from inventory. Use with great discretion.

**F10 Exit**....This will take you back to the **INVENTORY INQUIRY** Screen.

**PgUp/PgDn**.... Self-Explanatory.

**Serial Inventory Reports**

From the main menu, highlight **Reports & Statements**, and press the **ENTER** key. Press the **↓** key to **Serial Inventory Reports** and press the **ENTER** key.





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## Furniture (Inventory)

### Furniture Controls.


**Step 1:** From the main menu, highlight **SYSTEM SUPPORT**, and press the  key.

**Step 2:** Press the  key to **Customize SwiftLink™**, and press the  key.

**Step 3:** Press the  key to **Furniture Item Control**, and press the  key. A **FURNITURE ITEM CONTROL** screen will now pop-up. Choose either **Auto Assign Item Numbers** or **Manually Assign Item Numbers**. We recommend “Auto Assign...”. To choose, place an “X” by the appropriate option. If you choose “Auto Assign...”, you have three (3) options. We recommend “Vendor Numeric”. Type the number you want to start with, and press the  key. Now press the  key to update.

**Step 4:**  to **Furniture Cost Selection Control**, and press the  key. A pop-up window - “Furniture Cost” is now available. Your option for furniture reporting is to use either **R**- Replacement Cost (actual net cost) or **C** - Combined Cost. Combined Cost is actual cost, plus freight. Press the  key to update after you have made your selection.


### Adding New Furniture Inventory (or Editing Furniture Inventory)



**Step 1:** From the Main Menu select **Inventory** and press the  key.




**Step 2:** From the **Inventory** menu, you have three (3) choices:

Inventory  
Serial  
**Furniture**



Use your  key to select **Furniture** and press the  key.


**Step 3:** The cursor is at the “Number” field. The upper left mode  shows **Furniture**.

**Step 4:** The highlighted line now shows the model number with <Press enter to Add This Item>. If you made a mistake, press the  key, otherwise, press the  key.

**Step 5:** “Make”....Type in the Make (Brand) or the Vendor abbreviation you have already set up for this frame (style) number. If you are not sure what you have set up press the  key at the blank field. You now have a choice, either use your  key to select the appropriate make or press the  key for a new make.


**Step 6:** (Optional New Make)



“New Make”....If you press the  key on new make, type in the three (3) letter abbreviation you want to use and the cursor will move to the brand name. Type in the vendor name for that abbreviation and press the  key.



**Step 7:** “Description”....You are now at the **INVENTORY MASTER** screen with the cursor at the “Description” field. Type in the description and press the  key.

**NOTE:** The cursor skips the “On Hand” field intentionally.

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**Step 8:** “Repl. Cost”....The cursor is at the “Repl. Cost” (Replacement Cost) field. Type in the replacement cost and press the  key.


**Step 9:** “Freight”....The cursor is in the “Freight field”. If you know what the freight is for this particular frame number or vendor, enter it, and press the  key. Now accept the default if it is a specific dollar (\$) amount or if it is a percentage (%), change the (\$) to (%), and press the  key.



**Step 10:** “Prod Type”....The cursor is at the “Prod Type” (Product Type) field. Type in the product type code for this frame number. If you are not sure of the product codes, type in a “?” and press the  key. Use your  key to select the product type already set up or add a new one.



**Examples:**


BED - Bedding  
SOF - Sofa  
REC - Recliner

**Step 11:** “Cat”....After pressing the  key, the **CATEGORY SELECTION** screen will appear prompting you to choose if this frame is **Itemized** or **Non-Itemized Furniture**. Itemized is already highlighted; press the  key. A reason you may want to select **Non-Itemized** is if you have inventory that you do not want to have an individual tag or item number.

**Step 12:** “N/S”....The cursor is in the (Non Stock or Stock) with *S* for stocking as the default. You might want to mark a frame number as an N(non-stocking) if it is no longer available. Choose either N or S and press the  key.

**Step 13:** “Selling Prices” ....The cursor is now at the “Selling Price 1” field. Type your retail price and press the  key. You have the option of adding up to four (4) selling prices. If you set up “Margin Manger” for this specific Make and Product Type, Margin Manager pricing would appear in the appropriate fields. You can also set up a margin manager for this specific frame if you so desire, by using the  key (Individual) Margin Manager.

**Step 14:** “Minimum” ....Press the  key until the cursor is in the “Minimum” field. This field is optional. For reordering purposes, you may enter a minimum number for this specific frame number. Type the number and press the  key.

**Step 15:** “Maximum” ....The cursor is now in the “Maximum” field. This is also an optional field. For reordering purposes, you may want to enter a maximum number for this specific frame number Type the number and press the  key.

**Step 16:** “Eoq” .... (Economic orders quantity). The cursor is now in the “Eoq” field. This is also an optional field. This field is also used for reordering. As examples, for a specific frame number:

#### Example #1

Minimum = 2  
Maximum = 12  
Eoq = 0  
On Hand = 1  
On Order = 0

If you generated an auto P.O. with SwiftLink™, the system would recommend that you order eleven (11). Maximum (12) minus (-) On Hand (1) minus (-) On Order (0) = 11.

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### Example #2


Minimum = 2  
Maximum = 12  
Eoq = 6  
On Hand = 1  
On Order = 0


If you generated an auto P.O. with SwiftLink™, the system would recommend that you order six (6). Maximum (12) minus (-) On Hand (1) minus (-) On Order (0), but not more than Eoq (6) = 6.




**Step 17:** “Pos Notes”....(Point of Sale Notes) You can enter a number code (01 to 99) to designate a specific POS Note. Type the numeric code in the field, and a window pops up allowing you to enter a note which will appear on the **POS** screen at time of invoicing.

**Step 18:** “Bin”....Bin Location is for parts inventory.



**Step 19:** General Ledger....(Inventory)....This is the general ledger inventory asset account which is credited (credited for the cost) when you sell this frame number and assign an item number. Remember, the inventory account is not credited until you assign the item number. If you want the default account in the General Ledger Interface control to be credited, leave this field blank and press the  key.


**Step 20:**  
General Ledger....(Cost of Goods)....This is the general ledger cost of goods account which is debited (debited for the cost) when you sell this frame number and assign an item number. Remember, the inventory account is not debited until you assign the item number. If you want the default account in the General Ledger Interface control to be debited, leave this field blank, and press the  key.


**Step 21:** General Ledger....(Sales)....This is the general ledger sales/income account which is credited (credited for the selling price) when you sell this frame number, whether an item number is assigned or not. If you want the default account in the General Ledger Interface control to be credited, leave this field blank, and press the  key.


**Step 22:** Press the  key, and a pop-up window asks if you want to add item numbers. If you do, highlight **Yes** by pressing the  key and press the  key.

**NOTE: The On Order and Reserved fields are handled by the program.**

**Step 23:** “Item #”....At the “Item #” field, press the  key if you selected automatic assignment. If you selected manual assignment of item numbers, type the item number and press the  key.


**Step 24:** “Fabric1”....”Fabric1” is an optional field. Type in a fabric number (alpha/numeric), or leave the field blank and press the  key.

**Step 25:** “Fabric2”.... “Fabric2” is an optional field. Type in a fabric number (alpha/numeric), or leave the field blank, and press the  key.


**Step 26:** “Color”.... “Color” is also an optional field. Type in a color, or leave the field blank, and press the  key.


**Step 27:** “F-Loc”....This stands for floor location. In this field, type


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a code (ie. FL for Floor, WH for Warehouse, EWH for East Warehouse BR for Backroom, etc.), and then press the  key.



**Step 27:** “F/P”....Is the item “Floor Planned” Y/N. Choose Yes or No, and press the  key.


**Step 29:** “RecDt”....(Receive Date). In this field,type the date you received this piece. If you received it today, all you have to do is press the  key and today’s date will be filled in automatically.

**Step 30:** “Grace”....This field is for your grace period. If you have 30, 60, or 90 days to pay for the item, enter the number of days until you have to pay for the item and press the  key.


**Step 31:** “Cost”....This field is for the “Cost” field. Type your actual cost for the item here, and press the  key.

**Step 32:** “Freight”....This field is for the freight amount. Enter amount and press the  key.


**Step 33:** “\$/%”....If the freight is a dollar (\$) amount, type that amount in and press the  key. If it is a percentage (%), type the (%) sign here and press the  key.

**Step 34:**....Repeat another item. Press the  key with the cursor in the blank item number field. See how the whole line is filled in for you. If anything is different, use the up arrow key to go back up and correct the appropriate field.


**NOTE: The Count field is incremented each time you add another item.**

**Step 35:** To update when you have entered all the items, press the  key.




### **Edit Furniture (Inventory)**

**Step 1:** From the main menu, highlight **Inventory** and press the  key.




**Step 2:** From the **SELECT DESIRED INVENTORY** pop-up screen, choose **Furniture** (Inventory) and press the  key.

**Step 3:** Type the frame number in the “Number” field and press the  key.

#### **Step 4:** (Edit the Master File)

If you typed in a frame number that you have an inventory master for, that frame number is now highlighted. If you want to edit the master file, press the  key. If the system did not find an exact match, find the appropriate frame number and press the  key. Make the necessary corrections and press the  key to update.

#### **Step 5:** (Edit an Item Number)

If you typed in a frame number that you have an inventory master for, that frame number is now highlighted. Press the  key to the appropriate item number and press the  key. Make the desired corrections and press the  key to update.

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## Function Keys For INVENTORY INQUIRY SCREEN.

**F1 Help**....This is the Help Document.

**F5 Selection Criteria**....This allows you to change the criteria to “look up” inventory. These options are self explanatory. **S** is Sold, **A** is Available, and **B** is Both.

**F9 Notes**....This function key will let you see, change or add notes to a specific Inventory item

## Function Keys For FURNITURE INVENTORY MASTER.

**F1 Help**....This is the Help Document.

**F2 Update Add Item #**....When you are through, press the **F2** key to update the record.

**F5 Repeat**....If you want to add the same frame number to another location, press the **F5** key. The cursor will be in the “Location” field.

**F6 Margin Manager**.... You can set up an individual margin manager for an item.

**F7 History**....This will show sales/order history for the past twelve (12) months.

**F8 Delete**....This will allow you to delete an item from inventory. Use with great discretion.

**F10 Exit**....This will take you back to the **INVENTORY INQUIRY** Screen.

**PgUp/PgDn**....Self-Explanatory.

### **Furniture Inventory Reports**

From the main menu, highlight **Reports & Statements**, and press the  key. Press the  key to **Furniture Reports** and press the  key.

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## INVENTORY ADJUSTMENTS

### Build Inventory Kits

This module is designed to let you build your own kits from different Inventory masters. You must have the parts, model numbers, or frame numbers in your inventory before you use this module.

As you sell a kit, each item used will be deducted from the proper inventory.

For the Servicer you can build an flat rate code in a new inventory master that contains the parts and labor that will be used, all in one billing price.

For the Retailer you can combine washer and dryers as kits with special pricing or separate stereo components as one kit.

For Furniture you can build a bedroom suite, consisting of a bed frame headboard, triple dresser, pediment mirror and two night stands.


For HVAC you can set up a full installation of an A/C unit or heater with all the associated parts and labor needed.

KIT MASTER						
Loc	Make	Product Number		Price	Cost	
Description		Mark Down		Det/Sum		
Qty	Make	Item Number	Description	Price	Inv	
F1 Help	2 Update	F5 Call Inv	F8 Delete	F9 Note	F10 Exit	

### Setting up a new Kit

From the SwiftLink™ Menu select **Inventory Adj's**. From **Inventory Adj's** menu select **Build Inventory Kits**.

#### “Loc”

This is already defaulted to **W** for your store. To change the location use your  key.

#### “Make”

The cursor is in this position. Type in an abbreviation of the Make you want to use for this kit. It will help if you use the make abbreviation of the predominant piece of inventory you are using.

#### “Product Number”

Type in a new number to be associated only with this kit. After typing in a number you will be brought to the inventory master screen with the cursor on description.


INVENTORY MASTER				
Type Inventory				Loc W
Make SNY	Number 8437			
Description	Home Theater Kit			On Hand
Repl. Cost	Prod Type KIT			Cat 80 N/S S
Margin Manager	1.	2.	3.	4.
Selling Prices	1.	2.	3.	4.

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“Description” - Type in the description of the Kit

“Replacement Cost” - Leave this field blank as we will use the replacement costs of each of the individual inventory items.

“Product Type” - This is already defaulted to Kit along with Category type **80**

Press the  key now to save this inventory master and you will be brought back to the **KIT MASTER** Screen with the cursor at “Mark Down” field.

### **KIT MASTER**

“Mark Down” - Once a Kit is established you can go back to this field and mark down by a dollar amount or percentage for a special sale.

“Det/Sum” - “D” Detail or “S” Summary.

From Invoicing, either from Point of Sale or Service Invoicing when you type in the Kit number do you want to print out:

**D** - Detail of the Kit. Shows Kit number and total price along with each item that was part of the Kit.

**S** -Summary of the Kit. Show Kit number and total price only.

“Qty” - Quantity used for this kit.


“Make” - Make abbreviation of this item.

“Item Number” - The number you have currently set up in your inventory.

“Description” - This is defaulted to the description from your inventory. You may overwrite this field with a new description.

“Price” - The selling price of this item or if you are using the margin manager the margin manager’s retail price. You may overwrite this price with a new selling price.

“Inv” - Defaulted to which inventory this item is from. After you press enter to the next line, the cursor will be at the “Qty” field to input more data. The price and cost at the top will change after each line input.

When you are finished press the  key to Update and save.

A red screen will display:






Update Master Pricing No or Yes

**Yes** - You should always answer Yes to update the Kit Inventory Master. This will update the Replacement Cost and Selling Price which was left blank when you started making the Kit.

**No** - If you answer No, the Kit inventory master Replacement Cost and Selling Price 1 will not get updated.






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## Function Keys


-  Help
-  Update and save
-  Call Inv - Recalls Kit Inventory Master for editing or viewing
-  Note - a notepad to type in any notes about this master.
-  Exit



## Floor Planning








### Note Holder Abbreviation



From the Main Menu, highlight **Inventory Adj's** and press the  key. Highlight **Floor Planning** and press the  key. Highlight **Note Holder Setup** and press the  key. The first thing you need to do is set up your note holder's abbreviations. Like the other Abbreviation screens, type in a three-letter code that will equal the note holder. WFC=WPL FINANCIAL, GEC=GE CAPITOL. When you are finished, press the  key to save and the  key to exit.

### Assign Note Holder

In this menu you will assign the note holder of the serial numbers you already have entered. You cannot do this until you receive your invoice and trust number. **Assign Note Holder** is highlighted, press the  key. Type in the PO # you used previously, "WP" (today's date) or a "?" to bring up a list of your PO's or type in a date range of when you entered the serial numbers. From the PO all of the Model numbers and Serial numbers will appear.

If you are not using the purchase order numbers press the  key to Date Range. Enter a date range and all of the Model and serial numbers received during the specified date range will appear. Type in the line numbers as they appear on your trust sheet. When you are finished press the  key. You will need to place an “X” next to “Pay as Sold” field or next to “Scheduled Payment” field with # of payments for these items. (\*You must select one before we can go any further).




The cursor is now at **Invoice Number**, type in **55512**, at the “date” field press the  key and today’s date will appear or type in the date on the Invoice. Press the  key to “Due Date” field and this will be filled in, calculated from the 60 or 90 days, whichever you typed in the “Grace” field. In the “Freight” field, type in the freight amount **\$100.00** and press the  key. Press the  key past Total until the cursor is at Note Holder. Type in your Note Holder abbreviation, WFC or GEC or a “?” to bring up your note holders and press the  key on the selected note holder. Type in the Note number **1001**, in the “Number” field. The cursor is now at the “Date” field, press the  key and today’s date will appear. Press the  key again and the due date will appear along with your cost.



When you are finished press the  key to save. (Now all of your reports will show the model and serial numbers associated with a trust number.) Press the  key and you are now back at the **Floor Planning** Menu.

## Pay Floor Planning

When you are ready to pay your Floor Planning company, high-


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light **Pay Floor Planning** and press the  key. The cursor is now at Noteholder. Type in your abbreviation or a “?” to bring up a window to highlight the **Note Holder**. Press the  key and the cursor is now at the “Note Number” field. Type in a “?” and all the note numbers corresponding to that note holder will appear. Highlight the trust (note) number and press the  key. A list of all the model numbers associated with that note number will appear. You will also notice the serial numbers that have been sold, by showing the sold date.




Place an “X” next to the serial number you wish to select to pay at this time. When you are finished press the function key  and a window will appear with the cursor at “Check #”. The amount will already be filled in from the serial numbers you previously selected. Type in your check number and press the  key to save.


## RENT TO OWN


### Point of Sale


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




### New Account Setup

**Step 2:** The cursor is now at “Acct #.” Type in a 7 digit telephone number or, to set up a automatic account #, press the  key to bring up the “Customer Profile Name Search”. The cursor is in a blank box next to name. Press the  key again. The first highlighted line is “\*\*\* Add a new Customer \*\*\*” Press the  key and SwiftLink™ has assigned an account number and the cursor is at the “Name” field.


“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. Type in the Last name first because the customer search sorts by last name than first name when printing. The comma tells the system to reverse the names and leave a space where the comma is.


“ADDRESS 1”- Type in an address and press the  key


“ADDRESS 2”- This is used for P.O Box or Suite # or Apt. #.  
Press  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” fields are filled in. Press the  key to save the customer information and you are right back at “Point of Sale”.


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**Step 3:** After the account is set up the cursor is now at the “Bill to #” field. If you press  key the “Accounts Receivable” will be billed to the customer’s 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 the sale is 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 salesperson’s 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 Purchase Order number or Narda number press the  key past this field.




**Step 7:** “TaxCd” field. This is your “Tax Code” field. If you are delivering to a different taxing authority than 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:** “Ad” This is for tracking your 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  key after your selection.


## Assigning a Serial Number


**Step 9:** “QTY” - Type in **1** and 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 a make typed in you will be brought to the **SERIAL SELECTION** screen. If you did not put a “Make” in first 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 the “Price” field. 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 for a delivery charge. If you want to charge for delivery type in a dollar amount here. If you do not charge delivery or have included it in the sale press the  key.

**Step 16:** “Disc”- This stands for discount. If you want to give a customer a discount and not use the  discount you can type in an amount here. 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**

(For Rental Items only)


Select Rental Contract and press the  key.



### **RENTAL CONTACTS** screen

“Home Phone” Type in the home phone number, area code first.

“Work Phone” Type in the work phone number, area code first.


“Soc Sec No #” Type in the customers Social Security Number.


“Tax Exempt” This is defaulted to *N* for No. If the customer is Tax Exempt type overwrite this with a *Y* and press the  key.

“Insurance” This is defaulted to *N* for no. If the customer is taking out insurance on the rental item, type in a *Y* and press the  key. (If the customer is not taking out insurance press the  key to the “Security Deposit” field.


“%” Type in a number for the percentage of the total amount to be added to the rental payment for insurance.

**OR**


“\$” Type in a dollar amount that is to be added to the rental payment for insurance, press the  key.

“Security Deposit” Type in a dollar amount which will be added to the first payment and then press the  key.

A pop-up window will appear verifying the appropriate make, model and serial number being assign to the customer.

“Type” The cursor is now under type. Type in the “Product abbreviation code or a ? to bring up the codes you have previously set up. Press the  key when you are finished.

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% This is defaulted to **1.000**, meaning the 100% of the payment will go to this model number for the payment. If you had 2 or 3 line items, you could set the percentages for each item for the one payment. Press the function key  key when finished.


**Examples:**


<u>Type</u>	<u>Make</u>	<u>Model</u>	<u>Serial</u>	<u>%</u>
WSH	WHP	LA5500XKW1	JD36181EAW	.60
DRE	WHP	LER63838	RB8235398	.40


This example is showing that 60% of the payment is going to the washer and 40% is going to the dryer.



“Rental Pmt” Type in the Dollar amount that will be their payment.

“Term” Type in the number of payment that are to be made.


“Frequency” Type in **W** for Weekly, **BW** for Bi-Weekly, **M** for Monthly or **Q** for Quarterly. Press the  key.

“Downpayment” This is pre filled with the amount of the first payment. This amount includes the Rental payment plus Insurance and taxes. Type in a different downpayment or press the  key.

- “Last Payment” The Last Payment is displayed the same as the rental payment. Press the  key past this, unless last payment is a different amount. If the last payment is different amount overwrite the new amount .
- “Contract Amt” This is the total contract amount. You are also notified that the Security Deposit plus the downpayment is to be applied to the first payment.
- “Contract Date” Today’s date for the contract.

If you have made a mistake or need to change information press the  key until you reach the field you want to change. When you are finished press the function key  key.

### **Print Scheduled Payment Plan**

This is defaulted to *N* for No. If you want to print out the customers payment plan type in a *Y* and press the  key. You will be shown the invoice number and prompted to print the Invoice “N”o or “Y”es.