

Quick Start Guide #4





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Furniture Inventory Module Tutorial:

For training purposes, you are going to enter a sofa. The pertinent information of the sofa is as follows:

A. "Location"	Your Default Adjusting Inventory Location (i.e. W)
B. "Make" (Brand)	BAS (Bassett)
C. Frame "Number"	1500
D. "Description"	SOFA
E. "On Hand"	Leave Blank
F. "Repl. Cost"	\$500.00
G. "Freight"	10.00 %
H. "Prod Type"	SOF
I. "Cat"	85
J. "N/S"	S (For Non-Stocking vs. Stocking)
K. "Selling Price 1"	\$1995.00
L. "Minimum"	3
M. "Maximum"	20


Step 1: At the main SwiftLink™ menu select **Inventory** by pressing the  key to it, then press the  key.

Step 2: At the SELECT DESIRED INVENTORY screen choose **Furniture** and press the  key.

Step 3: The auto assignment of the item numbers has been established at the time you worked with the wizard.

Step 4: Type **1500** in the "Number" field and press the  key.


A) You will see 1500 with a description
"<Press Enter to Add this Item>".


B) Now press the  key.



Step 5: A pop up window will appear requesting you to type the “Make”. Type **BAS** in the “Make” field.


A) If BAS (Bassett) is a new make for you, another pop up window will appear requesting if this is a “New Make”.

B) Press the  key to place BAS in the appropriate area, then type **BASSET** and press the  key.



Step 6: Type **SOFA** in the “Description” field and press the  key.

Step 7: In the “Repl. Cost” field type **500** and press the  key.


Step 8: At the “Freight” field type **10** and press the  key, moving to the “%” or “\$” field and type **%** and press the  key.


Step 9: In the “Prod Type” field type **SOF** and press the  key.



A) If this is a new product type for you, a pop up window will appear asking if this is a new product type.

B) Press the  key to place SOF in the appropriate field; then type **SOFA** in the “Description” field and press the  key.



Step 10: You will now see a new pop up window “Category Selection”. Please select the default, Itemized Furniture. Please note that **85** will be displayed in the “Cat”egory field.


Step 11: In the “N/S” field, type **S** then press the  key.



Step 12: At the “Selling Prices” field “1”, type **1995** and press the  key. Please notice that it was not necessary to type the decimal point and the two zeros after 1995.


Step 13: Press the  key until you get to the “Minimum” field. Type **3** and press the  key.


Step 14: In the “Maximum” field type **20** and press the  key.


Step 15: Press the  key again to the “Pos Notes” and type **50**. You will now see a pop up window, please type **RECOMMEND SCOTCH GUARD** and press the  key.

Step 16: Now press the  key to save and update the above information. Congratulations! You have built the “master file” for BAS 1500 - SOFA

Step 17: You will now see a window which says “Do You Want to Add Item Numbers?”, press the  key to highlight **Yes** and press the  key. By doing this, you will be able to add individual sofas to your inventory in location **W**.


Step 18: You are now ready to enter the specific sofa(s). Press the  key and you will see how an item number was automatically assigned.


Step 19: In the “Fabric 1” field type **D123** and press the  key.









Step 20: In the “Fabric2” field type **Z0987** and press the  key.


Step 21: In the “Color” field type **GREEN** and press the  key.



Step 22: In the “F-Loc” field type **WH** and press the  key, twice.

Step 23: At the “RecDt” field simply press the  key for today’s date.


Step 24: Press the  key four (4) times, until the cursor is in the second line under item number.


Step 25: Press the  key and notice the entire second line is entered for you. If you want to change any of the information press the  key to highlight the desired field to change. Otherwise, press the  key eight (8) more times. Press the  key up seven (7) times to the “F-Loc” field and change **WH** to **FL** (Warehouse to Floor). Press the  three (3) times to “Fabric1” field and change D123 to **A100**. Press the  and change “Fabric2” field and change Z0987 to **B52**. Press the  key 6 times to “Cost” field change from 500 to **600**. At the “Freight” field change 50 to **60** and press , twice.

Step 26: Press the  key to add these items to your inventory.



Step 27: Since you changed the last item’s fabric types and cost, you want to highlight that item number and press . Press the  key down to “Selling Prices” field “1” and change 1995 to **2195**.

View The Sofas Which You Have Entered Into Inventory


Step 1: You should be looking at the **INVENTORY** screen with BAS 1500 . . .<FRAME NUMBER highlighted. Underneath, you will see the individual item numbers (sofas) you have just entered. Press  to Exit.




Step 2: Press  back to the main SwiftLink™ menu.

Step 3: Select **Reports & Statements** and press the  key.


Step 4: Press the  key to highlight the menu option **Furniture Reports** and press the  key.





Step 5: Press the  key to highlight **Furniture Availability** and press  key.




Step 6: Press the  key to generate this report and to view it on the screen. You will see that the last item number you entered is now the first because the report program put fabric A100 before D123 (alpha-numeric order). You can run this report with or without cost.

Step 7: Press the  key and select **Furniture Price Book W/ Fabrics & Colo.** Press the  key and then press the  key. Notice the difference between this report and the previous report.

Step 8: You may want to print some of these reports; give it a try.

Step 9: Press the  key until you return to the main menu.

Step 10: Please select the **Inquiry** menu option and press the  key, and press  key. Press the  key to highlight the **Furniture** menu option and press the  key.

Step 11: In the make field type BAS, then type 1500 in “Frame Number” field, and press the  key. Your cursor is now in the “Option” field with OPN highlighted; this stands for open or available. Now press the  key. Please notice the list on your screen. The information displayed on the screen is sorted by item number. Please notice that the item number with “Fabric1” A100 and “Fabric2” Z0987 is located on the floor. Your cursor is located to the left of the first item number. Press the  key to “EXPLODE” (Show)

Build Kits


What is a kit? A kit could be a bedroom suite (consisting of a bed frame, headboard, triple dresser, pediment mirror, and two night stands) or something as simple as a mattress and box spring or a sofa and two chairs. You are going to set up a kit consisting of one (1) BAS 1500 - SOFA and two (2) BAS 100 UPHOLSTERED CHAIRS. Since you have already entered several BAS 1500's, all you need to do is enter in several BAS 100's. The pertinent information for the chairs is as follows:

Description:	UPHOLSTERED CHAIRS
Repl. Cost:	\$200
Freight:	10% (or \$20)
Prod Type:	CHR (You will need to set up this Prod Type)
Cat:	85 (Itemized Furniture)
N/S:	S
Selling Prices 1:	\$660

Step 1: Set up BAS 100 just as you did BAS 1500, and add 8 items with Fabric 1= **A100** and no Fabric, Color = **GREEN**, and "F Loc" = **WH**.


Step 2: Now that you have set up the chairs, you need to build the kit. The information about the kit is as follows:


Make:	BAS
Number:	1500-100
Description:	LIVING ROOM SUITE
N/S:	S
Product Type:	KIT
Cat:	Take Default
Mark Down:	10%
Det/sum:	D
Qty BAS 1500:	1
Qty BAS 100:	2

Step 3: From the main SwiftLink™ menu, select **INVENTORY** and press .



Step 4: From the **INVENTORY ADJ'S** menu, choose **Build Inventory Kits** and press  key.


Step 5: Type **BAS** in the “Make” field and press .


Step 6: Type **1500-100** in the “Number” field and press .


Step 7: Since this is a new Kit, you are now at a new screen which will allow you to set up the Kit Master. Press the  key.


Step 8: Type **LIVING ROOM SUITE** in the “Description” field and press the  key.


Step 9: Press the  key three (3) times to the “N/S” field and press  to accept **S** as the default.


Step 10: Press the  key three (3) times to the “Product Type” field and accept the default **KIT** as the product type.


Step 11: Accept the taxable default for category and press the  key.


Step 12: Now press the  key.

Step 13: Notice how “Description” is filled in for you and the cursor is at the “Mark Down” field. Type **10** and press the  key. Now type **%**.


Step 14: Take the default **D** at the “Det/Sum” field and press the  key.

Step 15: Type **1** in “Qty” field and press the  key.


Step 16: Type **BAS** in “Make” field. **Do not** press  key.

Step 17: Type **1500** in “Number” field and press the  key.

Step 18: Notice how SOFA appears in the “Description” field and 1795.50 appears in the “Price” field. Also be aware of the fact that “F” (for furniture) appears next to Price


Step 19: Type **2** in the “Qty” field and press the  key.



Step 20: Type **BAS** in the “Make” field. **Do not** press the key.




Step 21: Type **100** in the “Number” field and press the  key.


Step 22: Notice how UPHOLSTERED CHAIR is in the “Description” field, 594 is in the “Price” field, and F appears next to it.




Step 23: In the top right hand corner, you will see 2,983.50 in the Price field and 900 in the “Cost” field.




Step 24: Press the  key twice.

Step 25: Press the  **Note** to add some notes to your kit. Type “The kit has a 10% markdown. The regular list price of the BAS 1500 is \$1995. and the list price of two BAS 500’s is \$1320., for a total of \$3,315.00. 3,315 less 10% is 2,983.50.” Press the  key to update the notes. Because the (10%) does not stay in the “Mark Down” field after you set up this kit, we recommend the above procedure.

Step 26: Press the  key and then you will see a pop up window that states “Update Master Pricing.” Press the  key to highlight “Y”es and press the  key to update.

Step 27: Press the  key twice to return to the main menu.

Step 28: Select **Inquiry**, press the  key, type 1500-100 in the “Number” field, and press the  key. Please note that the Living Room Suite Kit on the screen and the retail price is \$ 2,983.50. Press the  key and your cost appears on the right side of the screen.

Step 29: Please notice the bottom right hand corner of the screen you will see in red the word “Note”, which signifies that there are notes behind this kit. Press the  key, and press the  key six (6) times to highlight “Inventory Notes”. Press the  key to see the notes.

Margin Manager:

SwiftLink™ gives you the capability to have automatic “Selling Prices”. In fact the system can automatically calculate up to four different selling prices per item. What is necessary for this to happen is the following:

- A) “Make”
- B) “Product Type”
- C) “Item Cost”
- D) Up to four “Percentage MARK UP’s”, **not gross margin percentages.**

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

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

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

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

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


Listed below is a table for your convenience.


Cost	Selling Price	Gross Margin	Mark Up	Gross Margin %
100	500.00	400.00	4.000	80%
100	476.20	376.20	3.762	79%
100	454.60	354.60	3.546	78%
100	434.80	334.80	3.348	77%
100	416.70	316.70	3.167	76%
100	400.00	300.00	3.000	75%
100	384.70	284.70	2.847	74%
100	370.40	270.40	2.704	73%
100	357.20	257.20	2.572	72%
100	344.90	244.90	2.449	71%
100	333.40	233.40	2.334	70%
100	322.60	222.60	2.226	69%
100	312.50	212.50	2.125	68%
100	303.10	203.10	2.031	67%
100	294.20	194.20	1.942	66%
100	285.80	185.80	1.858	65%
100	277.80	177.80	1.778	64%
100	270.30	170.30	1.703	63%
100	263.20	163.20	1.632	62%
100	256.50	156.50	1.565	61%
100	250.00	150.00	1.500	60%
100	243.90	143.90	1.439	59%
100	238.10	138.10	1.381	58%
100	232.60	132.60	1.326	57%
100	227.30	127.30	1.273	56%
100	222.30	122.30	1.223	55%
100	217.40	117.40	1.174	54%
100	212.80	112.80	1.128	53%
100	208.40	108.40	1.084	52%
100	204.10	104.10	1.041	51%
100	200.00	100.00	1.000	50%
100	196.10	96.10	0.961	49%
100	192.40	92.40	0.924	48%



Cost	Selling Price	Gross Margin	Mark Up	Gross Margin %
100	188.70	88.70	0.887	47%
100	185.20	85.20	0.852	46%
100	181.90	81.90	0.819	45%
100	178.60	78.60	0.786	44%
100	175.50	75.50	0.755	43%
100	172.50	72.50	0.725	42%
100	169.50	69.50	0.695	41%
100	166.70	66.70	0.667	40%
100	164.00	64.00	0.640	39%
100	161.30	61.30	0.613	38%
100	158.80	58.80	0.588	37%
100	156.30	56.30	0.563	36%
100	153.90	53.90	0.539	35%
100	151.60	51.60	0.516	34%
100	149.30	49.30	0.493	33%
100	147.10	47.10	0.471	32%
100	145.00	45.00	0.450	31%
100	142.90	42.90	0.429	30%
100	140.90	40.90	0.409	29%
100	138.90	38.90	0.389	28%
100	137.00	37.00	0.370	27%
100	135.20	35.20	0.352	26%
100	133.40	33.40	0.334	25%
100	131.60	31.60	0.316	24%
100	129.90	29.90	0.299	23%
100	128.30	28.30	0.283	22%
100	126.60	26.60	0.266	21%
100	125.00	25.00	0.250	20%
100	123.50	23.50	0.235	19%
100	122.00	22.00	0.220	18%
100	120.50	20.50	0.205	17%
100	119.10	19.10	0.191	16%
100	117.70	17.70	0.177	15%
100	116.30	16.30	0.163	14%
100	115.00	15.00	0.150	13%


Cost	Selling Price	Gross Margin	Mark Up	Gross Margin %
100	113.70	13.70	0.137	12%
100	112.40	12.40	0.124	11%
100	111.20	11.20	0.112	10%
100	109.90	9.90	0.099	9%
100	108.70	8.70	0.087	8%
100	107.60	7.60	0.076	7%
100	106.40	6.40	0.064	6%
100	105.30	5.30	0.053	5%
100	104.20	4.20	0.042	4%
100	103.10	3.10	0.031	3%
100	102.10	2.10	0.021	2%
100	101.10	1.10	0.011	1%
100	100.00	-	0.000	0%



We are now going to set up an automatic pricing routine for a Bassett pedestal.


Step 1: From the main menu choose “System Options”, and press the  key.

Step 2: From this menu select “Customize Menu Options” and press the  key.

Step 3: From the “Program Customizing Selections” menu press the  to **Column Margin Manager** and press the  key.






Step 4: Type **BAS** in the “Make” field. Do not press the  key.

Step 5: Type **PED** in the “Product Type” field. If the pop-up window “Product Selection” appears, press the  key for “New Product” type and press the  key.

Step 6: Type **PEDESTAL** in the “Description” field and press the  key.

Step 7: We are going to make an assumption that the list price is represented by a 200% mark up.

Col-1	2.00	(This represents list price.)
Col-2	1.55	(This represents a 15% discount off of list price.)
Col-3	1.25	(This represents a 20% discount off of list price.)
Col-4	0.30	(This represents the minimum that we will sell this item for.)


Step 8: Type **2** in the “COL-1” field and press the  key. Type **1.55** in the “COL-2” field and press . Type **1.25** in the “COL-3” field and press the  key. Finally, type **3** in the “COL-4” field and press the  key. Now press the  key.


Step 9: The value of the previous exercise will be become apparent in the next section.




Create and Receiving Purchase Orders:




For training purposes, you are going to enter again a sofa. The pertinent information of the sofa is as follows:

- A) "Supplier": BAS
- B) "Make": BAS
- C) "Item": 1500
- D) "Fabric1": B52D
- E) "Fabric2": B36
- F) "Color": GREEN
- G) "Quantity": 6
- H) "Reference": STOCK


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. 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 vendor supplier number for the accounts payable feature of SwiftLink™).


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 "PO Number" field. Press the  key; notice another pop-up menu with the option of <AUTOMATICALLY ASSIGN A PO #>. Press the  key to allow the system to automatically assign 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 five (5) times 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 6 (the ordered amount). Press the  key to review your PO. Press any key to continue. Press the  key to return to the purchase order.




At this time, to demonstrate that you can add to an open purchase order, you will add the following information concerning a upholstered chair:




A) “Item”:	100
B) “Fabric1”:	F4D
C) “Fabric2”:	RF4
D) “Color”:	SKY BLUE
E) “Quantity”:	4
F) “Cost”:	\$250.00
G) “Freight”:	0
H) “Percent”:	10
I) “Reference”:	NEW FABRICS FOR STOCK



Step 10: Press the  key and type **100** in the “Item” field and press the  key.

Step 11: Now type **F4D** in “Fabric1” field, **RF4** in the “Fabric2” field, in the “Color” field type **SKY BLUE**, and press the  key.

Step 12: Type **4** in the “Quantity” field and press the  key. Since these specific fabrics type are more expensive the cost needs to be adjusted.





Step 13: Type **250** in the “Cost” field and press the  key. Type **0** in the “Freight” field and press the  key, and type **10** in the percent field and press the  key.


Step 14: Press the  key down to the “Reference” field and type **NEW FABRICS FOR STOCK**, and press the  key. Now press the  key to **Update**. Please note the total for your PO has been adjusted to \$4,000.



Step 15: Press the  key to review the revised PO. Press the  key to continue.

At this particular time we are going to now add to the current PO some items that we have never stocked or ordered before:





A) “Item”:	200
B) “Description”:	PEDESTAL
C) “Fabric1”:	BRASS
D) “Color”:	GLASS
E) “Quantity”:	2
F) “Cost”:	125
G) “Freight”:	17
	\$
H) “Reference”:	STOCK




Step 16: Press the  key until the “Item” field is highlighted, type **200** and press the  key, notice the pop-up selection type window press the  key to highlight the furniture option and press the  key.




Step 17: In the “Description” field type **PEDESTAL**, press the  key.


Step 18: To further identify this particular pedestal in the “Fabric1” field type **BRASS**. Guess what, “Fabric1” does not have to be a fabric or color. It can be anything that is meaningful to you. Press the  key skipping the “Fabric2” field and highlight the “Color” field. In the “Color” field type **GLASS** and press the  key.

Step 19: In the “Quantity” field type **2** and press the  key.


Step 20: Type **125** in the “Cost” field and press the  key. The freight is **17 \$** and press the  key. Press the  key down to the “Reference” field and type **STOCK**, press the  key.


Step 21: Press the  key and now press the  key to review and see the updated PO. Press the  key to continue.





Step 22: You are now back at the purchasing screen. Press the  key and answer the question “Yes” by pressing the  key, and then press the  key.

Step 23: Press the  key to return to the main menu.


Receiving a PO:


Step 1: From the main menu select **Create/Receive Purchase Orders** and press the  key.



Step 2: Enter the “Supplier” and the PO number of the order, and press the  key.





Step 3: You are now on the receiving screen. Press the  key to accept today’s date. Press the  key to the “Location” field. This is the location you are going to put the newly arrived inventory. Press the  key. The cursor is at the “Invoice #” field, if you know the invoice number type it in the field; if not, you might enter in the bill of lading number and press the  key.

Step 4: You received everything you ordered.




Step 5: Press the  key until the recing screen changes to a furniture screen. The reason that you are now on a furniture screen for a BAS 200 - Pedestal is because you have never stocked it before.



Step 6: Notice that the Description, Replacement Cost, and Freight automatically appear for you. Press the  key until the cursor is in the “Product Type” field.



Step 7: Type **PED** in the “Product Type” field and press the  key. Notice how selling prices automatically appeared from the pre-defined “Margin Manager”. Please press the  key until the “Selling Prices” “1”.

Step 8: Type **429** in the “Selling Prices” “1” field and press the  key. You have just made a manual override to the Margin Manager for this frame number. Now press the  key. Press the  key to validate the cost and freight fields. Now press the  key. A red screen appears with the statement “are you sure you want to update this Page?”.

Step 9: Press the  key to highlight “YES” and press the  key.

Step 10: You now see four BAS 100’s, press the  key three times to the FLR (Floor Location). Type WH in that field and press the  key. For FP (Floor Planning) accept the default N for NO. Press the  key down through the item numbers.

Step 11: We want to put the last item number on the floor, not in the warehouse. With the cursor highlighting the last “item number”, press the  key once to the “Frt” field, and then press the  key three (3) times to the “FLR” field. Now type **FL** in the “FLR” field.



Step 12: Press the  key until the cursor is on a blank line. Now press the  key.


Step 13: Receive the other two line items (BAS 1500 & BAS 200) the same way, and put all of them in the WH (“FLR” - Floor Location).


Step 14: Congratulations you have received your first purchase order.



View the affect of the PO:

Step 1: You should now run a posting activity report.

Step 2: Press the  key until you return to the main menu choosing **Reports & Statements**. Press the  key.

Step 3: Press the  key to highlight **Furniture Reports**.

Step 4: Press the  key to **Furniture Availability**.





Step 5: Press the  key once to highlight the “Make” field. Type **BAS** in the “Make” field. Press the  key.

Step 6: View the inventory that you entered today.

Installment Contracts

Before using Installment contracts you must customize your Installment Contract Control Screen and if you sell insurance you must set up your Installment Contract Insurance. You can do this either from the Installments menu or System options, (Customize SwiftLink™).

Using the Keyboard

- * The  key takes you to next field
- * The up-arrow key takes you to the previous field
- * The function key  saves the information
- * The function key  exits the screen
- * The  (escape) key clears the screen
- * Caps Lock - should always be on.
Everything in SwiftLink™ should always be in upper case (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 enter and SL will automatically place a .00 after the number.




Installment Setup

Contract Header Message - 1st line would be your company name. 2nd line is your address 3rd line is your City, State, and Zip code 4th line is your Area code and phone number:

Filing Fee - Type in the rate you charge for the filing fee.


Interest Rate - Type in the interest rate you are going to charge.

Add-on - This is defaulted to *N* for no. If you use add on interest type in a *S* and you will be taken to the Add-on Step Interest Calculation Table.

Add-on Step Interest Calculation Table - Type in the percent, press  and then fill in the dollar amount. Press the  key and you are taken to the next percentage for the exceeding balances. Press the  key to save when finished.

Downpayment - Type in the downpayment percentage that you charge.

Contract terms - These are defaults that can be changed once inside the contract you have 4 defaults you can use.

Print Contract - *Y* - Always, *N* - Never, *P* - Ask to print. Highlight selection and press the  key.

Tax Rate - Type in your stores Tax Rate

Tax Rate Finance Charge - If your state allows you to tax the finance charge, type in the rate here.


Late Fee Charges - Type in a percentage, dollar amount and Minimum. Example, 5.000% or \$5.00 Minimum \$1.50 This means you will charge a late fee of 5% of the total but if 5% is lower than \$1.50 your late fee charged would be \$1.50. If your 5% is greater than \$5.00 you will only charge \$5.00

Late Fee Added After ___ Days - Type in how many days should they be late before a late fee is added.

Round Payment to Even Dollar - This is defaulted to *Y*.

This means every payment will be rounded up to the next dollar amount without change. The last payment will reflect the differences.




Minimum Finance Charge Refund - Type in the dollar amount that is the minimum you will refund.


Finance Charge Refunds by - This is defaulted to *Rule of 78*. If you want to change this to Pro-rata, press the  key

Form Code - Type in your state abbreviation.


Last Contract # - Type in your last contract number.

Insurance Setup

Make sure you contact your Insurance Company to get the latest rates per \$100 for the insurance's you sell. Use the  key to go to the next field and the  key to back up to the previous field. When you are finished press the  key.

Life Insurance - Place an X in front of the life insurance you want to be your default. You should have prices after each insurance for options that can be changed in the contract. To change the refund from *Rule of 78* to Pro-rata, use the  key.

Examples:		Refund By
<input type="checkbox"/> 1. No Life insurance		
<input type="checkbox"/> 2. Single Decreasing	\$.85	Rule of 78
<input type="checkbox"/> 3. Joint Decreasing	\$1.03	Rule of 78
<input checked="" type="checkbox"/> 4. Single Level	\$1.10	Rule of 78
<input type="checkbox"/> 5. Joint level	\$1.25	Rule of 78

Health Insurance - Place an X in front of either No Health Insurance or Accident & Health Table. Press the  key to set up the Accident & Health Table or called AD & D Table (Accidental Death & Disability)

Property Insurance - Place an X in front of the insurance to be defaulted and the yearly cost per \$100.

Other Insurance - Place an X in front of No other Insurance or Other Insurance and type in the dollar amount for the yearly cost per \$100.




Calculate Insurance Using Only Amount Financed- (Not on Interest). This is defaulted to *N*, if you want to calculate insurance on the total amount place a *Y* in the field.

Minimum Amount to be Refunded - Type in a dollar amount in this field.




Maximum Insurable Age - Type in the maximum age you will insure.

Creating a New Contract for a New customer

1. From Point of Sale

Select **Point of Sale** from the Main menu and press the  key. The cursor is now at the “Acct #” field. Type in a 7 digit telephone number. From the **CUSTOMER INFORMATION** screen fill out the customers name, address, city, state zip code, phone numbers, and cross streets, if needed. Press the  key when you are finished to bring you back to the **POINT OF SALE** screen. After completing the sale, at the **METHOD OF PAYMENT** screen highlight **Installment Contract** and press the  key. You are now taken to the **CUSTOMER PROFILE** screen as there is more information needed for the **INSTALLMENT CUSTOMER PROFILE** screen than the **Point of Sale** customer profile.

Installment Contract Customer Profile

From invoicing you are now at the **INSTALLMENT CONTRACT CUSTOMER PROFILE PROFILE** Screen with the account # already filled in. Press the  key. The Name, Address, City, State information is on the screen. Press the  key through the fields that you deem necessary to fill in. After completing the fields you need press the  key to update and save.

Alarm - Defaulted to *N* for No. If you type in a *Y*, every time the customer account comes up to you will be notified to check the customer notes.

Late Charges - Defaulted to *Y* for yes. If you have a customer that you never want to charge late charges than change this to N.

Reminder - Defaulted to *Y* for yes. If you have a customer that you never want to send out a reminder to change this to N.



Mailing List- Defaulted to *Y* for yes. If you do not want this customer on your mailing list change this to N.











Account Closed - Defaulted to *N* — Change this to *Y*, if for any reason you would like to close the account so no one can charge on it, but you still want to keep the customer history and you still need to take payments.

(The bottom row of Current, 30,60 & 90 is financial aging filled in by the SwiftLink™)


When you are finished press the  key to update and save. You will now be brought over to the Installment contract screen.







2. From the Installments




- A. Select Customer Profile first. Type in a 7 digit Telephone number **or** press the  key 3 (three) times to assign a sequential SwiftLink™ account number. Fill in as much information as necessary. When you are finished press the  key to update.

- B. Select Installments and the cursor is at “Start Name” field. Type in the first few letters of the last name and press , your name selection will appear. Use your  and  keys to highlight the name you want to select. Once the name is highlighted, press the  key for New contract. You have now been brought over to the **INSTALLMENT CONTRACT** Screen with the cursor on Contract Date. Press the  key of contract terms. Press the  key on Sales information. You are now at the **POINT OF SALE** screen. Type in the information you need for the sale (the same way you would for a normal sale). When the cursor is at the “Tax” field press the  key and you are brought back to the **INSTALLMENT CONTRACT** screen. If you need to make any changes to the contract press the  key to change the terms. When you are finished press the  key to update, type in the contract number, press the  key again, and then print out your contract and invoice.

Changing Terms of contract



Once you are at the **INSTALLMENT CONTRACT** Screen, if there is anything you need to change on the contract before you print it, now is the time. To change terms press the  key and select what you need to change.




Sales information	
Downpayment / Trade-in	
Insurance / Filing Fee	
Term / Interest Rate	
Fixed Payment Amount	
Payment Start Date	

From this screen you can select what you would like to change and then SwiftLink™ will recalculate the new agreement. (Once you learn the  keys to use from the **INSTALLMENT CONTRACT** screen, you can use them instead of pressing the  key first.) After you make any necessary changes press the  key to **Update** and save. You will then be prompted to, type in the contract number, print the contract, and print the invoice.

* Note If you are changing information on the contract, such as, fixed payment amounts, downpayments, etc., this will have an directly effect the Term (length) of the contract. If you are changing information, make sure the terms is the last category to be changed.

Renewing a Contract

From Point of Sale - After you have finished the **POINT OF SALE** screen and are in method of payment, select **Installment Contract** and press the  key. If the customer already has a contract with you a window will appear with the contract # and the cursor defaulted to **Y** to **Renew This Contract**. If you press the  key this will recalculate the first loan as a payoff and add the balance of the old loan to the new loan. If you change this to **N** for no this will create a new contract for the customer. (If the customer has more than one loan outstanding, and you type in a **N** on the first contract, the next contract will appear, prompting you to **Y** to renew or **N** for not to renew.

From Installment - Select **Installments** and the cursor is at “Start Name” field. Type in the first few letters of the last name and press the  key, your name selection will appear. Use your  and  keys to highlight the name you want to select. Once the



name is highlighted, press the **F4** key for **New Contract**. A window will appear with the contract number and the cursor defaulted to **Y** to **Renew This Contract**. If you press the **ENTER** key this will recalculate the first loan as a payoff and add the balance of the old loan to the new loan. If you change this to **N** for no this will create a new contract for the customer. (If the customer has more than one loan outstanding, and you type in a **N** on the first contract, the next contract will appear, prompting you to **Y** to renew or **N** for not to renew.

Making a payment on a contract



From Checks & Payments - Select **Installment Payments**. Type in the account number or press the **ENTER** key for **CUSTOMER PROFILE NAME SEARCH** and select the name your looking for. The contract number along with date, name, payment amount, and description will appear highlighted. If there is more than one contract open select which contract you want to make a payment on and press the **ENTER** key.

From Installment Inquiry Screen - Select **Installment Inquiry** from the Installment menu. The cursor is at “Start Name” field. Type in the first few letters of the last name and press the **ENTER** key, your name selection will appear. Use your **←** and **→** keys to highlight the name you want to select. Once the name is highlighted, press the **F5** key for **Payments**. The contract number along with date, name, payment amount, and description will appear highlighted. If there is more than one contract open select which contract you want to make a payment on and press the **ENTER** key.





Payment Amount

Type in the amount of the payment and press the  key. Press the  key to update, and then select the method of payment.



Cash Payment

Select **Cash Payment** and press the  key. If the amount is the same press the  key. If the amount is more, type in the amount, and the customers change will show.

Check Payment

Select **Check Payment** and press the  key. Type in the check number. If the amount of the check is the same as on the screen press the  key. If the check is more than the payment, overwrite the check amount shown and press the  key. The change to give back to the customer will appear. Press the  key to continue. You are now prompted to print out a receipt.




Credit Card







Select **Credit Card** and press the  key. Type in the card name, number, expiration date and approval number. Press the  key to continue and you will be prompted to print out a receipt.


Split Payments

This is to be selected when the customer is splitting a payment by cash, check or credit card.

Paying off a contract

From Checks & Payments - Select **Installment Payments**. Type in the account number or press the  key for **CUSTOMER PROFILE NAME SEARCH** and select the name you are looking for. The contract number along with date, name, payment amount, and description will appear highlighted. If there is more than one contract open select which contract you want to payoff and press the  key. For the payment amount type in the same as the "Payoff Amount". Press the  key to update and select the **METHOD OF PAYMENT**.

From Installment Inquiry Screen - Select **Installment Inquiry** from the Installment menu. The cursor is at "Start Name" field. Type in the first few letters of the last name and press the  key, your name selection will appear. Use your  and  keys to highlight the name you want to select. Once the name is highlighted, press the  key for payments. The contract number along with date, name, payment amount, and description will appear highlighted. If there is more than one contract open select which contract you want to make a payoff and press the  key. For the payment amount type in the same as the "Payoff Amount". Press the  key to update and select the **METHOD OF PAYMENT**.

Credit Applications - This is where you can type in a Credit Application to keep on file in SwiftLink™ and print out to send to your credit agency. From the **INSTALLMENT** menu select **Credit Application**. Type in as much information as you feel necessary, Press the  key when finished.

Collection Program - This is integrated with Installments to automatically bring over any customers that are late on their payments. The information you need to call will be on the screen. The cursor is at the first line of collection notes. Type in any promises from the customer here. Press the **F2** key to save. The **F4** key will take you to the next customer, while the **F3** key will take you back to the previous customer.

Post late fees - This program is to add the late fees for any customer that has any outstanding payments past the allocated grace period. Depending on how many customers you have, you should run this program daily or weekly.

Estimated Payoff's - From **CHECKS & PAYMENTS**, select **Installment Payments** and press the **ENTER** key. Type in the account number or press the **ENTER** key for **CUSTOMER PROFILE NAME SEARCH** and select the name you are looking for. The contract number along with date, name, payment amount, and description will appear highlighted. If there is more than one contract open select which contract you want the estimated payoff for and press the **ENTER** key. The cursor is at "Payment Amount". Press the **F6** key. Type in the "Estimated Payoff Date" and the "Estimated Payoff" amount will show.

Reports - All of the reports have a defaulted monthly date range that you can change to daily, weekly, or your own date range. At the "Print option" field all the reports are defaulted to print on the screen. To print from your printer change the N to a Y.

Amortization Report - This report shows a payment amortization for a specific contract number.

Contract Aging Report - This report shows aging information for a specific contract, all contracts or delinquent contracts only.

Contract Listing - This report shows a list of all installment contracts written during a specific time period. This report will show totals for Open Contracts and Renewed Contracts, along with Contract Number, Name, Date, Contract Amount and Insurance.

Late Fee Report / Reminders - This report will show a list of all late fees charged during the specific date range typed in. R is defaulted for the past due Report. Change the R to a P and you can generate a past due reminders to send out.

Insurance Report - This report will show a total of different insurance's sold during a specific date range.

Payment Register - This report prints a daily register of payments received through installment contracts.

Refund Report - This report shows a breakdown of insurance and interest refunded.