

# CHAPTER 1

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## Counter Operations

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As you already know, the most important aspect of any retail business is income from over-the-counter activities. COMPTRON<sup>®</sup> is specially designed to make all business transactions in your store as fast and efficient as possible. You will be amazed at how easy it is to use COMPTRON<sup>®</sup> at the Parts counter. With COMPTRON<sup>®</sup> you can:

- > Record sales
- > Cross-reference between vendors
- > Place Special Orders
- > Locate superseded parts quickly
- > Use Stock Kits
- > Substitute parts
- > Record returned parts
- > Create and locate Hold tickets
- > Record lost sales
- > Provide estimates for parts and service
- > Look up account balances and make payments/refunds
- > Record a variety of financial transactions (partial or full payments on an account, cash or credit sales, Special Orders, Repair Orders, etc.)
- > Print a ticket which serves as a receipt after any transaction

In order to perform these functions, COMPTRON<sup>®</sup> provides a series of menu screens for you to go through, depending on what you choose to do. As you follow the simple step-by-step instructions on each screen, and type in the required information, remember that you are updating many files and keeping COMPTRON's data base current. There is a great deal of power at your fingertips.

## How to Use This Chapter

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This chapter corresponds to **Option 1** of the **Parts Menu: Counter Operations**. Several major activities can be handled from the Parts counter:

- > Selling a part
- > Substituting parts
- > Returning a part
- > Preparing and printing an estimate
- > Recording a lost sale
- > Creating a Hold ticket
- > Finding a Hold ticket
- > Looking up account balances or making payments and refunds on accounts
- > Ordering a part (*see also Chapters 3 and 6*)
- > Making payments or refunds on Repair Orders
- > Adding parts to an existing Repair Order ticket
- > Cross-referencing inventory (*discussed in Chapter 2*)



**NOTE:**

*These activities are performed most often. Working with COMPTRON® you may identify other activities useful in your operation. Also, the screen shows the ticket as it is being built.*

*A pointing hand symbol in the left margin (as used for this note) indicates helpful hints or options which are not visible on the screen.*

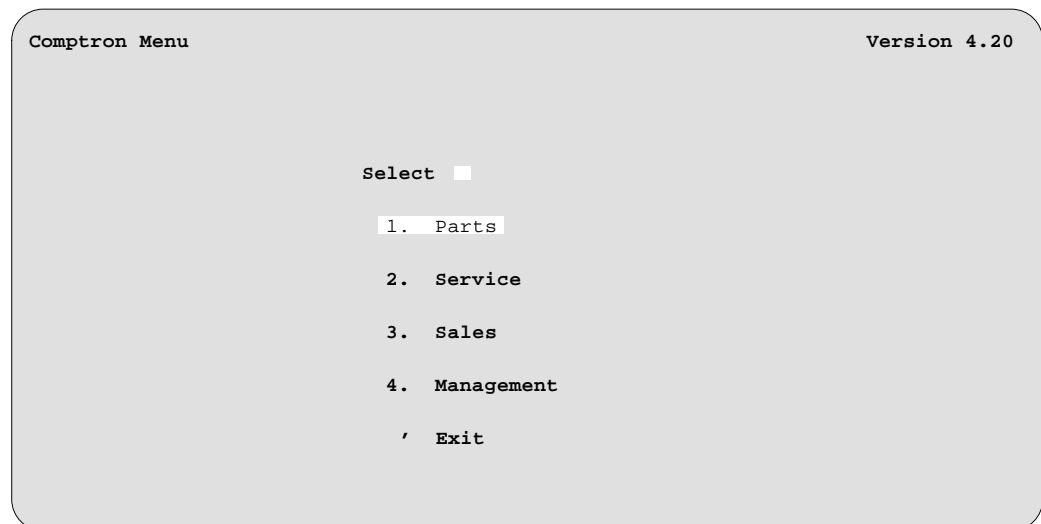
The following pages explain the steps for each of these activities. As you work with COMPTRON®, you'll see that other options are available also.

## Comptron Menu

At the login screen prompt, type `comptron` (lower-case) and press *Enter*. After displaying the copyright screen, the program will ask for your password. Type your password and press *Enter*. (*Your password is the string of characters that you use to identify yourself to the computer. It is assigned by your manager/owner.*)

From the **Comptron Menu** that appears, you can select one of three or four different options: **Parts**, **Service**, **Sales**, or **Management**. The options you see will depend on your level of access as assigned by your manager. Most of the COMPTRON® menus operate through “hot key” commands, which means that the keystroke takes effect immediately after you type the number or letter corresponding to your choice, without your having to press the *Enter* key. “Hot keys” are also used for command line options, but not for data fields within a screen.

Comptron Menu



### Explanation of Menu Options:

- < 1> **Parts** - This option lets you run the COMPTRON® **Point of Sale/ Inventory Control** programs along with other counter operations.
- < 2> **Service** - This allows you to create and print Repair Orders (ROs), and to track vehicles and customers. Other options in this program module allow you to do service scheduling and appointments.
- < 3> **Sales** - This option will only appear on the **Comptron Menu** if Comptron Data's Finance and Insurance (F&I) module is installed for your Sales department, and the operator has been assigned the proper access level to use various options on the **Sales Menu**.
- < 4> **Management** - This option is for owners or managers, or persons authorized to have complete control over the business. This program is used to change many defaults such as tax rates, printer destinations, and special reports. This option will only appear for users with an access level of 11. (*Refer to the first section of Chapter 11, Management, for information on setting up operators access levels.*)

## Parts Menu

This manual is organized to follow the format of the **Parts Menu**, which is displayed upon selection of **Option 1** from the **Comptron Menu**. Chapters 1 through 10 are named after the menu options shown here.

### Parts Menu

```
Parts Menu                SMITH ACTION SPORTS                Version 4.20
                          22 BROADWAY
                          RIVERSIDE, CA 92500

                          Select 

                          1. Counter Operations
                          2. Cross Reference
                          3. Special Orders
                          4. Print Labels
                          5. Parts/Inventory
                          6. Order Processing
                          7. End of Day/Month
                          8. Physical Inventory
                          9. System Reports
                          0. System Maintenance

                          ' Exit
```

If you have an access level (password) of 10 or greater, you will see all these options. If you have a password of 4, for example, you will see only options 1 through 4.

## Counter Operations Menu 1

From the **Parts Menu**, type 1 to select **Option 1, Counter Operations**. The following menu is displayed:

### Counter Operations Menu

Counter Operations

Select

1. Create Ticket
  2. Find Hold Ticket
  3. Account Payment
  4. Special Orders
  5. Repair Order Payment
  6. Repair Order Parts
  7. Service Menu
  8. Parts Menu
- ' Exit

### Explanation of Menu Options:



**NOTE:** Depending on your level of access, you may not see all of these options displayed.

- < 1> **Create Ticket** - Use this option to start a new ticket.
- < 2> **Find Hold Ticket** - Use this option to find a ticket that was built and put on Hold earlier. (For more information on finding Hold tickets, see page 1-26.)
- < 3> **Account Payment** - If your customers want to make payments to their accounts or claim refunds, use this option.
- < 4> **Special Orders** - Use this option to pick up a Special Order, refund a deposit on a Special Order, or make a deposit on a Special Order. This is a shortcut to the **Special Order Processing** menu.
- < 5> **Repair Order Payment** - Use this option to make a payment (deposit) or refund on a Repair Order.
- < 6> **Repair Order Parts** - Use this option to add parts to a Repair Order or edit lines in an existing Repair Order ticket.
- < 7> **Service Menu** - Use this option as a shortcut to go to the **Service Menu** from **Counter Operations**.
- < 8> **Parts Menu** - Use this option to go back to the **Parts Menu**.

## Create Ticket Option 1-1

To create a ticket, select **Option 1** from the Parts **Counter Operations** menu, and you will see the following screen. If you don't want to include customer information when you print this ticket, press **Enter** to **Continue**.

Basic Create Ticket Screen

```

< >          < > Continue      <'> Exit      <C> Customer Information
=====
Ven Code      Part Number      Description      On Hand      Price
-----
              Cost      Qty              Date-Ord On-Order Back-Ord
=====
Ln Ven Part Number      Description      Qty Ty Pri %      Amount

```

### Including Customer Information on the Ticket

If you wish to have the customer number or account number and name/address printed on this ticket, select **C**, and a blank **Customer Information** screen appears. It offers you the option of picking up the data for an existing customer from your Customer file, changing that information, or adding a new customer to your file. With the cursor on the **Last Name** field, a search prompt at the bottom of the screen reminds you to type in a name or customer number to locate.

To add a new customer, just start typing; use the *Enter* key to step through the remaining fields, and the apostrophe (') if you need to back up to a previous field to make corrections. Always try to get complete customer information, whether for regular counter sales or Special Orders—once it is entered into the system, it will be available to all departments. *(For complete information on adding/changing customer data, refer to Chapter 10, System Maintenance, and read the Customer section.)*

To search for a customer entry, you can just type the first letter or a few letters of the name, and COMPTRON® will find and display the first customer name matching that starting "string" of letters (see following screen example). To find an account number, press *Enter* to move to the **Customer #** field and type a full or partial number. Press *Enter* to accept the customer entry, or if the first name that comes up is not the one you need, use the < N> command to see the next one. You can add a new customer to your file from here, and if you want to print a customer label (e.g., so you won't forget to send a "welcome" flier to a new customer), you can do so now from this screen.

## Customer File Screen

```

      <N> Next  <P> Prev  <A> Add  <V> Vehicle  <'> Exit  < >
Customer File <S> Search  <C> Change  <d> Delete  <L> Label  <M> Memo

L-Name  ANDERSON                      Customer #    000000A65302
F-Name  ROBERT                        Middle W     Tax ID #
SSN     567-34-2985                    DOB  8/16/59  Age  39      Tax Code
Dr Lic  W196324                        Lic State WA Discount Type <R> Retail
Spouse  MARLENE                        Discount %
Attn                                         Account Type <A> Account
Addr    1978 ELM ST                    Credit Limit  $1500.00
City    VANCOUVER                      Amount Charged $306.77
County  CLARK                           Amount Paid   $306.77
State   WA                               Balance       $0.00
Hm Phone 360-943-1234                    Fax #         Credit Avail  $1500.00
Wk Phone 360-785-3163                    Wk Ext 123    Last Charged  5/14/2003
Cellular                               Pager #       Last Credited  6/15/2003
E-Mail                                         Date Added    12/11/2003
Remark  HELMET LAYAWAY $89.04 30/60/90 DAYS Last Sale     5/14/2003
Alert

      1  2  3  4  5  6  7  8  9 10
Category                X                Vehicles  Model      Yr  Make
                               1          XV750      99  YAMA

```

Once you have chosen a customer or account to include, the ticket screen returns, with the customer information displayed in the middle:

Create Ticket Screen:  
Customer Data

```

< >                                <'> Exit
<P> Parts  <S> Service  <W> Warranty  <H> Wholesale  <I> Internal
=====
Ven Code   Part Number   Description                               On Hand   Price
-----
      Cost  Qty  Cust #  Name                               Date-Ord  On-Order  Back-Ord
-----
                               A65302  ANDERSON, ROBERT W
=====
Ln Ven Part Number   Description                               Qty Ty Pri %   Amount

```

## Choosing a Department

The screen now shows a default department setting (a character P or S) in the upper left corner, automatically selected for you by COMPTRON<sup>®</sup> based on the department where you are assigned. Some businesses use departmentalized accounting for the purpose of keeping track of each department's financial condition.

The department options in COMPTRON<sup>®</sup> are displayed in a horizontal menu bar across the top of the screen. They are **Parts**, **Service**, **Warranty**, **Wholesale**, and **Internal**; they are illustrated and explained on the next page. You can press *Enter* to accept the default option, or override this by typing over it the letter of the department to which this ticket should be credited.

Create Ticket Screen:  
Departments

< >		<'> Exit		
<P> Parts	<S> Service	<W> Warranty	<H> Wholesale	<I> Internal
=====	=====	=====	=====	=====
Ven Code	Part Number	Description	On Hand	Price
-----	-----	-----	-----	-----
Cost	Qty	Date-Ord	On-Order	Back-Ord
=====	=====	=====	=====	=====
Ln Ven Part Number	Description	Qty Ty Pri %	Amount	

**Explanation of Department Options:**

- < P> **Parts** - The **P** option is for parts sales credited to the Parts department. These are usually parts sold over the counter to retail customers.
- < S> **Service** - The **S** option is for parts sold that need to be credited to the Service department.
- < W> **Warranty** - The **W** option is for parts sold that are to be credited to the Warranty department, to be covered by warranty from the manufacturer.
- < H> **Wholesale** - The **H** option is for parts sold to customers with a resale tax number that are to be credited to the Wholesale department and are not to be charged tax. The customer's tax number will be printed on the ticket. If you select this option, you will be asked for a claim number. Type the claim number, then search for the customer's name or account number.
- < I> **Internal** - The **I** option is used for parts sold to an internal (in-house) account for transfer of inventory from one area of your store to another. No actual money changes hands and no tax will be charged (example: parts "sold" from the Parts department to the New Bike Sales department). If you choose this option, you will be asked for a unit number. This allows you the opportunity to track where the parts are being transferred. You are also asked for an internal account number to which the parts are to be charged.



## Setting Up the Ticket Price

Next, the top of the screen changes to offer the following five options for setting up the **ENTIRE** ticket price. These options are explained below.

Create Ticket  
Screen: Ticket Price

```

Ticket Price  <R>                               <'> Exit
<R> Retail    <D> Discount %   <A> Account   <c> Profit %   <d> Markup %
=====
Ven Code      Part Number      Description                                On Hand      Price
-----
                Cost   Qty                                Date-Ord On-Order Back-Ord
-----
Ln Ven Part Number      Description                                Qty Ty Pri %   Amount

```



**NOTE:** Depending on your access level, the **Profit %** and **Markup %** options may not appear.

### Explanation of Ticket Price Options:

- < **R**> **Retail** - Sets up the ticket to default to retail prices.
- < **D**> **Discount %** - Sets up the ticket to default to a percentage of discount off the retail price.
- < **A**> **Account** - Allows this item to be charged to your customer's account.
- < **c**> **Profit %** - Sets up the ticket to default to a percentage of profit above your cost. This does not include a handling charge.
- < **d**> **Markup %** - Sets up the ticket to default to a percentage of markup from cost. This cost does not include your handling charge.

## Choosing the Transaction Type

After you set the **Ticket Price** option, you will need to select the type of transaction for this ticket, using the “department” options described previously. If you select **P**, **S**, or **H**, and you have entered a customer for whom there is an account, the options at the top of the screen will change to let you choose **Charge** or **Tender**, as illustrated below.

Create Ticket Screen:  
Charge/Tender

```

< >          < > Charge   <T> Tender
=====
Ven Code      Part Number      Description                                On Hand      Price
-----
                Cost   Qty   Cust #  Name                                Date-Ord On-Order Back-Ord
                A65302  ANDERSON, ROBERT W
-----
Ln Ven Part Number      Description                                Qty Ty Pri %   Amount

```

If you select **C** for **Charge**, COMPTRON® will check the customer Account file and retrieve the account information (credit limit, discount amount, etc.) to allow your customer to charge this ticket. If you choose **T (Tender)**, COMPTRON® will still use the account information (discount amount, etc.) but it will show the customer paying cash for the purchase.

Now you are ready to enter parts information on the ticket for this sale. The following list describes the Parts ticket fields.

### ***Ticket Screen Field Descriptions:***

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**Ven** - Vendor (supplier) number. Your manager can give you a printed sheet of valid vendor numbers to place near your link terminal.

**Code** - Different codes may be assigned to each part number. If a code has been assigned to a part number, you may find the part number by typing the code instead of the part number. This is especially helpful if you have long part numbers; you may assign each part a short code to find it in COMPTRON®.

**Part Number** - The number assigned to a particular part by the manufacturer. Here and throughout COMPTRON's screens, this field holds up to 18 characters.

**Description** - A description of the part to ensure correct part identification.

**On Hand** - The quantity in stock of this part. If you do not have the part in your Stock file, and COMPTRON® looks on the price book tape and finds the part information, the word **CATALOG** appears here.

**Price** - The retail price (selling price) of the part.

**Cost** - The dealer cost of a part. Cost can also display at the bottom of the screen (representing the cost of the total ticket). Dealer cost information is confidential, however, so the default setting for both areas is "not displayed."



**NOTE:** *Cost displays will not appear on the screen unless they are turned on and the operator is at the Management access level set up in Chapter 11. To TURN ON the cost displays on the screen, type C in the Ven field and your cost will display. To turn it back off, type C again.*

**Qty** - The number of parts the customer wants to purchase, order, or return.

**Category** - The stock category code number assigned to the part.

**Date-Ord** - The date when the part was last ordered.

**On-Order** - The quantity currently on order.

**Back-Ord** - The quantity currently backordered.

**Ln** - The ticket line number.

**Type** - The type of transaction. Possible types are **S** for sale, **O** for Special Order, **Z** for specially ordered on a Hold ticket, **R** for return, **G** for special vendors, **E** for exceptions, and (appearing only to those operators without access to relieve inventory) **I** for in stock or **N** for not in stock.

**%** - The percentage of discount or profit.

**Amount** - The total dollar amount for a line, excluding tax.

## Selecting the Priority Code for Special Orders

If you have selected **O** (Special Order) for the transaction type, the top line of the screen will change for you to choose a priority code for shipment of the specially ordered parts:

Ticket Screen: Special Order Priority Code

```

Priority <0> NORMAL - NO PRIORITY
                                     </> Search
=====
Ven Code      Part Number      Description                      On Hand      Price
-----
      Cost   Qty   Cust #   Name                               Date-Ord On-Order Back-Ord
      -----
      A65302 ANDERSON, ROBERT W
=====
Ln Ven Part Number      Description                      Qty Ty Pri %      Amount

```

If the default priority level is not what you need, you can use the slash **</>** **Search** command, and the following **Priority Description** window will open:

Ticket Screen: Priority Description Window

```

Priority <0> NORMAL - NO PRIORITY
                                     </> Search
=====
Ven Code      Part Number      Description                      On Hand      Price
-----
      Cost   Qty   Priority Description                      d On-Order Back-Ord
      -----
Ln Ven Part Number      Description                      Ty Pri %      Amount
      -----
      0      NORMAL - NO PRIORITY
      1      NEXT DAY AIR
      2      UPS 2-DAY SELECT
      3      UPS 3-DAY SELECT
      4      UPS GROUND DELIVERY
Enter Priority or <'> Exit <0>

```

## Entering Parts Information

After you select the transaction **Type**, the top of the screen will change to let you enter parts information. With the cursor on the first field (**Ven**), the apostrophe **<'>** command option allows you to **Exit** the screen. But once you type the vendor number and press *Enter* to accept it, the function of this command key changes to “Prev” for the **Code**, **Part Number**, **Price**, **Cost**, **Qty**, and **Category** fields; this will move the cursor back to the previous field.

If you are unsure of the number for this supplier, you can use the slash **</>** **Search** command in the **Ven** field to open a window for a scrolling search of the Vendor file. You will be prompted to choose whether you want the file list arranged in name or number order, and the range to display. Then a window similar to the following will appear, letting you move down the list and locate the vendor you want. A menu bar within the window shows that you can use the *Page Down*, *Page Up*, *Home*, and *End* keys to move to other parts of the vendor list. The *Page Down* key will display the next screenful of vendors, *Page Up* will return to the previous screen, *Home* will take you to the beginning of the list, and *End* will display the last screen.

When you find the vendor you need, just type the line number for that entry and press *Enter*. Instantly the window disappears, COMPTRON® shows that vendor in the **Ven** field, and the cursor is at the **Part Number** field.

Create Ticket Screen:  
Scroll Search Window

```

                                <'> Exit </> Search
=====
Ven Code      Part Number      Description                      On Hand      Price
/
                                Ln Number <'> Exit <Pg-Dn> <Pg-Up> <HOME> First <END> Last < >
Vendor List

```

Line	Name	Vendor
1	ACERBIS	100
2	ALL PARTS INC.	048
3	AMERICAN HONDA MOTOR CO.	000
4	AMERICAN SUZUKI MOTOR CORP.	006
5	ARTCO (ARTICAT & TIGERSHARK)	018
6	AXO SPORT	079
7	B.M.W.	028
8	BARCLAY MARINE	037
9	BELL INDUSTRIES	020
10	BRIGGS & STRATTON	069
11	BRITISH CYCLE	055
12	CAGIVA/DUCATI	080

Next, type the part number and press *Enter*, or use the *</>* **Search** option, which works the same way as for the **Ven** field (it is also available also for the **Code** and **Category** fields). COMPTRON® will look at your Stock file and display the part number information. If that is not found, the system searches the Vendor file (by part number and code) for alternate vendors and then checks the manufacturer's price book (if installed by COMPTRON®).

If there is a Stock file record on an alternate vendor for the part, the screen will change to show a block of **Substitute** part data at the bottom of the ticket (*for more information on substituting parts, see page 1-18*). If the price book is not installed for that vendor, the message **\*\*\*\* Record not Found \*\*\*\*** appears. You may sell or order the part, but you'll have to type in the information about the part.

If your dealership has Compton Data's new Master Book feature enabled, you will be able to search ALL vendors' price books and the entire Stock file for a part number or code, regardless of the vendor number. To use the Master Book feature at the **Create Ticket** screen, skip the **Ven** field and type in the part number or a partial part number to see a complete list of possible parts. Then just choose the correct line number for your part (the quantity on hand will display), and **Sell** or **Order** the item. Another option would be to press the slash (/) key when the cursor is at the **Part Number** field, and choose "Both" to list the items.



**NOTE:** If you are using barcode labels printed in COMPTRON®, you must zap them from the **Ven** field. OEM barcodes must be zapped from the **Part Number** field.

After finding the information from your Stock file or manufacturer's price book, COMPTRON® displays it as shown in the following example. At the top of the ticket screen you will see these **Parts Information** command options:

Create Ticket Screen:  
Parts Information

< >		< > Continue		< > Exit		< U> Supersede		< X> Cross Ref	
		<S> Sell		<O> Order		<R> Return		<L> Lost Sale	
=====									
Ven Code	Part Number	Description	On Hand	Price					
000 1113737	15410-426-010	OIL FILTER	5	\$5.68					
=====									
Cost	Qty	Cust #	Name	Date-Ord	On-Order	Back-Ord			
\$2.58				09/10/04					
=====									
Ln	Ven	Part Number	Description	Qty	Ty	Pri	%	Amount	

**Explanation of Parts Information Command Options:**

- < > **Continue** - Use this option to ignore this part and look for another part.
- < ' > **Exit** - Use this option to go back to the password prompt.
- < X > **Cross Ref** - Use this option to look for a list of parts with the same Code, Part Number, Description, or Category. This lets you quickly tell customers about the selection of items from which to choose, including cost and availability, without your having to go look at shelves or displays to see what is in stock.
- < U > **Supersede** - When a manufacturer supersedes a part number with a new part number, the new part number is placed in the **Description** field. When this occurs, simply type U and COMPTRON® will look up the new part number.
- < S > **Sell** - Use this option to sell a part.
- < O > **Order** - If you do not have these parts, or enough of these parts in stock, type O and COMPTRON® will special order these parts for your customer.
- < R > **Return** - Use this option if your customer is returning parts for credit.
- < L > **Lost Sale** - If you want to track why parts were not sold, type L and COMPTRON® allows you to type a reason for the lost sale. A report can be printed to show all the reasons for lost sales.

Type the part number or code and press *Enter*. The part information is displayed. If you started your ENTIRE ticket with a discount, COMPTRON® defaults to the discount amount for this **Parts Information** display. However, you may override the discount on **THIS PARTICULAR ITEM** at this point, for the top of the ticket screen will change to offer **Item Price** options for the part selected.

If you have chosen to **Order**, **Return**, or record a **Lost Sale** on a part for which COMPTRON® did not find a record in the Stock file or on a **Lost Sale** action listing (i.e., you had to type in all the information about the part), the system will automatically create a stock record for that part. As soon as you have entered the part quantity, the **Category** field prompt will appear on the screen, with the cursor located directly beneath it as illustrated below:

Create Ticket Screen:  
Category Prompt

```

                                     </> Search
=====
Ven Code      Part Number      Description                      On Hand      Price
002           26488-91             GEAR SHAFT                          0            $57.44
=====
          Cost   Qty   Category                      Date-Ord On-Order Back-Ord
                               ANDERSON, ROBERT W
=====
Ln Ven Part Number      Description                      Qty Ty Pri %      Amount
1 000 15410-426-010      OIL FILTER                          1
    
```

At this point you may enter a valid part category for the newly created stock record, or use the slash < /> **Search** command to scroll through the Category file and select the appropriate category for the new part, or press *Enter* to proceed without entering a category, in which case COMPTRON® will assign the default category “ZZ” to the new stock record.

If you have chosen the **Sell** command option for a part that is not already listed in the Stock file, then as soon as you enter the quantity, COMPTRON® may display the prompt “Create Stock Record (Y/N)?” on the screen, as illustrated below, offering you the option of telling the system **NOT** to create a new stock record for that part number and vendor:

Ticket Screen: Create  
Stock Record Prompt

```

                                     </> Search
=====
Ven Code      Part Number      Description                      On Hand      Price
002           26488-91             GEAR SHAFT                          0            $57.44
=====
          Cost   Qty   Create Stock Record (Y/N) ? < >
                               ANDERSON, ROBERT W
=====
Ln Ven Part Number      Description                      Qty Ty Pri %      Amount
1 000 15410-426-010      OIL FILTER                          1  S
    
```

Any new stock records created on a ticket with a default “ZZ” part category will be listed on the Category Adjustment Report, which is printed as part of the End of Day. This report can also be printed by selecting **Option 3, Category**, from the **Stock Reports** menu. (Refer to the *Category Option heading under the Stock Reports section of Chapter 9, System Reports.*) Management uses the report as a worksheet to help resolve default “ZZ” stock categories to meaningful values.

## Setting the Item Price

The only difference between the **Item Price** screen display and the earlier **Ticket Price** screen display is the **< P> Price Adj** command option. This allows you to adjust the price on this item only. If you select **P**, COMPTRON® allows you to type any price.

Create Ticket Screen:  
Item Price

```

Item Price      < >
<R> Retail      <D> Discount %      <P> Price Adj      <c> Profit %      <d> Markup %
=====
Ven Code        Part Number      Description                      On Hand      Price
000 0032656    42311-216-000    COLLAR WHEEL                      Catalog      $5.50
-----
          Cost   Qty   Cust #   Name                      Date-Ord On-Order Back-Ord
          $2.48   2
=====
Ln Ven Part Number      Description                      Qty Ty Pri %      Amount

```

After you set the **Item Price** option, the top of the screen will change to show **Tax** options. The default is taxable, so just press *Enter* to accept it. The **Tax** options will display only if sales tax is applicable to the transaction.

## Using Stock Kits

Introduced in COMPTRON® Version 3.21, a Stock Kit (or “Kits”) is a tool for grouping stock or catalog part numbers into “kits” that are accessible from **Parts Counter Operations** or the **Repair Order Parts** screen, simply by entering a “kit number.” Upon entry of a kit number, each item in the kit is automatically pulled onto the screen in turn, for the operator to **Sell** or **Skip**. All the part information for each item sold or ordered is placed on the ticket as though the operator had manually entered it on the keyboard. This feature simplifies looking up parts, increases operator speed, and ensures accuracy when a specific group (or groups) of items is (are) sold. The following paragraphs describe how to add and use Kits.

At the **Create Ticket** screen, after an item is sold or ordered on the ticket, the **< K> Add Kit** command option will appear at the top of the screen, as shown below, indicating that you may choose to **Add** a Stock Kit to the Kit file.

Create Ticket Screen:  
Add Kit Option

```

< >      < > Continue      <H> Hold Ticket      <e> Estimate
          <E> End Ticket      <C> Cancel Line      <T> Cancel Ticket      <K> Add Kit      <M> Memo
=====
Ven Code        Part Number      Description                      On Hand      Price
-----
          Cost   Qty   Cust #   Name                      Date-Ord On-Order Back-Ord
=====
Ln Ven Part Number      Description                      Qty Ty Pri %      Amount
1 000 11311-216-010    COVER R CASE                      1  S          6.28

          Cost   $3.73   Sub Total      $6.28   Tax      $.46   Total      $6.74

```

Since it makes no sense to create a kit consisting of only one item, continue adding items to the ticket until you have a list of all the vendors, part numbers, and quantities that will make up this new Stock Kit. Next, press **< K> Add Kit**, which will display a window that prompts you to enter a kit number of up to 20 characters in length. When you have done so, the prompt message will change and ask you to enter a description of the kit (up to 30 characters). This is optional, but it will make it easier for you or another user to identify the correct Stock Kit in the future. The **Add Kit** window is illustrated below:

Create Ticket Screen:  
Add Kit Window

```

<K> < > Continue <H> Hold Ticket <e> Estimate
      <E> End Ticket <C> Cancel Line <T> Cancel Ticket <K> Add Kit <M> Memo
=====
Ven Code   Part Number   Description                               On Hand   Price
-----
Cost
-----
Add Kit
-----
Kit Number: OIL PUMP KIT
Description:
-----
Enter (optional) kit description.
-----
Ln Ven Part Nu  %      Amount
1 000 11311-    6.28
2 000 91251-0   3.60
3 000 13103-2  42.36
4 000 15611-9   3.52
5 000 15200-2  70.25

Cost      $74.93  Sub Total  $126.01  Tax      $9.14  Total      $135.15
    
```

When you have typed in a kit number and description, COMPTRON® will offer these command options across the bottom of the **Add Kit** window:

< > Accept    <C> Correct    <'> Exit    < >

When you press **Enter** to accept it, the **Add Kit** window will close and the **Create Ticket** screen will reappear:

Create Ticket Screen:  
Total Kit Parts List

```

< > < > Continue <H> Hold Ticket <e> Estimate
      <E> End Ticket <C> Cancel Line <T> Cancel Ticket <K> Add Kit <M> Memo
=====
Ven Code   Part Number   Description                               On Hand   Price
-----
000 0017640  42711-033-000  275X17KR-NT114                               3         30.33
-----
Cost      Qty      Cust #   Name                               Date-Ord On-Order Back-Ord
$18.04    1
-----
Ln Ven Part Number   Description                               Qty Ty Pri %      Amount
1 000 11311-216-010    COVER R CASE                               1  S   6.28
2 000 91251-001-023    OIL SEAL 45X58X7                           1  S   3.60
3 000 13103-268-010    PISTON 0.50                                1  S  42.36
4 000 15611-921-000    CAP OIL                                     1  S   3.52
5 000 15200-286-010    PUMP ASSEMBLY OIL                          1  S  70.25

Cost      $74.93  Sub Total  $126.01  Tax      $9.14  Total      $135.15
    
```



## Selecting an Existing Kit

After you have added a Stock Kit, notice that when the cursor is in the **Ven** field, <K> Kits” is displayed on the menu bar at the top of the screen. Pressing < K> while in the **Ven** field will advance the cursor to the **Part Number** field and the field name will change to “**Kit Number.**” You may either enter a kit number or use the slash < /> **Search** command to display a window where you can scroll through a list of all the kits with their descriptions.

### Explanation of Kits Window Command Options:

- < #> **Ln** - Lets you enter a line number to select a kit for the ticket.
- < V> **View** - Changes the window to let you enter a kit’s line number so you can see a list of all the part numbers included in that kit, with their vendor numbers and descriptions.
- < d> **Delete** - Prompts you to enter the line number for the kit you want to remove, or else exit the window. If you choose a line number, you are asked to verify (Y/N) that you want to delete the kit on that line.



**NOTE:** The **Delete** command option will not appear unless the operator is at the Management access level set up in Chapter 11.

- < ' > **Exit** - Allows you to leave the **Kits** window.

Create Ticket Screen:  
Kits Window

Ln	Kit Number	Description
1	PDI	00001PDI KIT
2	BRK	00002BRAKE REPAIR KIT
3	CRKCS	00003CRANKCASE REPAIR KIT
4	OLCH	00004OIL CHANGE KIT

Cost	\$74.93	Sub Total	\$126.01	Tax	\$9.14	Total	\$135.15
------	---------	-----------	----------	-----	--------	-------	----------

If you select a kit from the **Kits** window, you will be returned to the ticket and the first part in the kit will be displayed for you to **Sell**, **Order**, **SU**persede, etc.—or you may **Skip** that item. Then each remaining part in the kit will be pulled onto the ticket screen automatically, one item at a time, for you to **Sell** or **Skip**, until the complete kit has been processed. Each kit item that you sell or order appears on the ticket as if you had typed in its vendor, part number, and other information from the keyboard.



**NOTE:** Each item in the kit must be dealt with before you can do anything else.

### How to Change a Kit

To change a kit, first process it onto a counter ticket, changing the individual parts as you go. Next, select the < K> Add Kit command to add the changed kit to your Kit file **with a NEW** kit number. Finally, < d> **Delete** the OLD kit number entry.



**NOTE:** Changing a kit is best done from the Repair Order **Parts** screen, because there you have more options available.

### Substituting Parts

When you enter a part on a ticket for which the vendor and part number or vendor and code match a record in the Stock file that contains a substitute vendor and part number, the parts information display will change to show a block of **Substitute** part data fields at the bottom of the ticket screen, as shown in the following example (provided that a record exists for that substitute vendor and part number). This is usually done to indicate where a less expensive version of the original equipment manufacturer's (OEM) part, such as brake pads, is available from another vendor. This puts more information at your fingertips, so that if your customer hesitates over the price, you can quickly offer a cheaper alternative.

Ticket Screen:  
Substitute Part

```

< >          < > Continue      <A> Substitute      <U> Supersede      <X> Cross Ref
<'> Exit      <S> Sell          <O> Order          <R> Return         <L> Lost Sale
=====
Ven Code      Part Number      Description              On Hand      Price
000 HOF       15410-426-010    HON OE 426 OIL FILTER    24           $6.27
-----
          Cost  Qty  Cust #  Name                               Date-Ord On-Order Back-Ord
          $2.85                                     10/29/01                25
=====
Ln Ven Part Number      Description              Qty Ty Pri %      Amount

=====S u b s t i t u t e=====
Ven Code      Part Number      Description              On Hand      Price
009 HOF       140004           HON BM 426 OIL FILTER    15           $3.39
-----
          Cost  Qty  Cust #  Name                               Date-Ord On-Order Back-Ord
          $1.60                                     10/29/01
    
```

Notice that the array of command options at the top of the screen has changed as well, offering an additional option: < A> **Substitute**. Selecting this option will cause COMPTRON® to substitute the cheaper part in place of your original choice on the main part of the screen, and if a still cheaper third part option is available, that will appear in the **Substitute** block, as illustrated on the next page:

## Ticket Screen: Second Substitute Part

```

< >      < > Continue      <A> Substitute      <U> Supersede      <X> Cross Ref
<'> Exit      <S> Sell          <O> Order           <R> Return         <L> Lost Sale
=====
Ven Code    Part Number    Description                On Hand    Price
009 HOF     140004         HON BM 426 OIL FILTER      15         $3.39
-----
          Cost    Qty    Cust #    Name                Date-Ord On-Order Back-Ord
          $-.-          10/29/01
=====
Ln Ven Part Number    Description                Qty Ty Pri %    Amount
-----
=====S u b s t i t u t e=====
Ven Code    Part Number    Description                On Hand    Price
010 HOF     150024         HON PU 426 OIL FILTER      3          $2.95
-----
          Cost    Qty    Cust #    Name                Date-Ord On-Order Back-Ord
          $1.80          10/29/01          5

```

Selection of the new substitute would bump it up to the main portion of the parts information display, letting another possibility move into the **Substitute** block; or, if the substitute choices have been exhausted, your original part choice would be displayed there.

As your ticket is built, you will see a screen similar to the following example. For this example, we will **Sell**, **Order**, and **Return** parts on the same ticket. In this case the vendor is 000, and we have decided to **Order** (*Special Order*)\* *a quantity of two*.

## Ticket Screen Example

```

< >      < > Continue      <H> Hold Ticket      <e> Estimate
<E> End Ticket      <C> Cancel Line      <T> Cancel Ticket
=====
Ven Code    Part Number    Description                On Hand    Price
-----
          Cost    Qty    Cust #    Name                Date Ord On Order Back Ord
=====
Ln Ven Part Number    Description                Qty Ty Pri %    Amount
1 000 42311-216-000    COLLAR WHEEL              2  O  .10    17.28
2 000 15410-426-010    OIL FILTER                 1  S  4      6.45
3 000 16151-002-004    NEEDLE JET                 1- R .10    7.18-
-----
Cost        $4.19    Sub Total    $16.55    Tax        $1.08    Total        $17.63

```

\* See Chapter 6 for details on special ordering.

### Explanation of Screen Command Options:

< > **Continue** - Use this option to Sell, Order, or Return additional parts on this ticket; press *Enter* to continue.

- < **H**> **Hold Ticket** - Type **H** to have this ticket held in memory so parts can be added and removed until it is ready for completion. When added to a Hold ticket, the part is **TAKEN OUT OF INVENTORY**. After you make this selection, COMPTRON® asks for the Hold ticket number. This is a four-digit number. *(For more details, see the Hold Tickets section of this chapter, at page 1-24.)*
- < **e**> **Estimate** - Type lower-case **e** if you want to print an estimate for the customer. You may want to put some estimates on Hold because COMPTRON® does not retain estimate information. If a customer returns the next day to pick up the parts or have the work done, you won't have to enter the information again.
- < **E**> **End Ticket** - Type uppercase **E** if the ticket is complete.
- < **C**> **Cancel Line** - Type **C** to cancel one line of the ticket. Lines containing Hold ticket deposits or refunds cannot be canceled unless you are at least at the Management access level *(see Chapter 11)*. If you have only one line on the ticket and type **C**, the ticket is canceled.
- < **T**> **Cancel Ticket** - Type **T** to cancel the entire ticket. Tickets cannot be canceled unless you are at least at the Management access level *(see Chapter 11)*.

In the preceding ticket example, we have *special ordered* two wheel collars and have given a 10% discount on the first line of the ticket. The second line is a *sale* of one oil filter with no discount. The third line is a *return* of a needle jet with a discount of 10% (restocking fee).



**NOTE:** *If you give a discount on a return, COMPTRON® will charge the customer the amount of the discount. This is useful if you charge a restocking fee.*

### Scrolling Down a Screen

Although one ticket can hold up to 100 line items, you will not be able to see more than 13 on one screen. The **Scroll** option lets you change the view of the lines on the bottom portion of the screen.

This option does not appear until you are working on line 14.

- < **S**> **Scroll** - Type **S** if the number of parts entered cannot be viewed on one screen.

The next page shows an example of a full ticket screen:

## Full Ticket Screen

< >		< > Exit Scroll		<S> Starting Line No		<N> Next		
=====								
Ven Code	Part Number	Description	On Hand	Price				
000 0042515	17640-271-000	COVER RS TANK	Catalog	\$61.58				
-----								
Cost	Qty	Cust #	Name	Date-Ord	On-Order	Back-Ord		
\$26.31	1							
=====								
Ln	Ven	Part Number	Description	Qty	Ty	Pri	%	Amount
1	000	11311-216-010	COVER R CASE	1	S			6.28
2	000	91251-001-023	OIL SEAL 45X58X7	1	S			3.60
3	000	13103-268-010	PISTON 0.50	1	S			42.36
4	000	15611-921-000	CAP OIL	1	S			3.52
5	000	15200-286-010	PUMP ASSY OIL	1	S			70.25
6	000	42711-033-000	275X17KR-NT114	1	S			30.33
7	000	30250-001-103	CONDENSER	1	S			8.00
8	000	45465-028-000	CLIP WIRE	1	S			.50
9	000	30250-001-103	CONDENSER	1	S			8.00
10	000	17353-268-030	TUBE L CLEANER	1	S			12.17
11	000	61100-268-040S	FENDER FRONT	1	S			191.86
12	000	44711-268-830	TIRE FRONT 275-18	1	S			79.98
13	000	90127-253-000	BOLT REAR PANEL	1	S			2.84
Cost	\$273.34	Sub Total	\$459.69	Tax	\$33.33	Total	\$493.02	

**Explanation of Screen Command Options:**

- < > **Exit Scroll** - Returns to the regular ticket functions.
- < S> **Starting Line No.** - Displays the ticket with the starting number of your choice.
- < N> **Next** - Displays the next screen of lines.
- < P> **Prev** - Displays the previous set of lines shown on the screen.

**Field Descriptions:**

- Sub Total** - The ticket total before tax.
- Total** - The total of the ticket including tax.

**Ending the Ticket**

After you type **E** to **End** the ticket, you will have the option to select **C** for adding or changing customer information. If you want customer information printed on the ticket, select **C**; otherwise, press *Enter*. If you select **C**, and no customer data was included on the ticket at the start, the information that you obtain now (if new) will be added to your Customer file for future reference. Always try to get complete customer information—once it is entered into the system, it will be available to all departments and COMPTRON<sup>®</sup> functions.

If you enter data for a customer with an existing account, you will be able to choose between the payment options **Charge** and **Tender**. If you select **C** (Charge), COMPTRON<sup>®</sup> will retrieve the account information from the Account file and allow your customer to charge this ticket, providing there is sufficient credit remaining on that account to cover the ticket total. If you choose **T** (Tender), COMPTRON<sup>®</sup> will still use the account information, but will show the customer paying cash for this purchase.

You can even split payments between **Charge** and **Tender**; for example, you can use an existing credit on an account and then take the balance of the payment in cash, or by check or credit card, etc.

If you already obtained customer information when starting the ticket, selecting **C** will allow you to change the account payment indicator from “Charge” to “Tender” or vice versa. After you finish with customer information, the following **Enter Amount Received** screen is displayed:

**Enter Amount  
Received Screen**

Enter Amount Received	
Total Ticket	\$17.63
Special Ordered	\$17.62
Minimum Amount	\$ .00
Type Payment	Amount
Money	\$20.00
Check	
Visa	
Mastercard	
Other	
Total Received	\$20.00
Amount Change	\$2.37
< > Accept   <'> Correct   <U> Undo   < >	

### ***Field Descriptions:***

**Total Ticket** - The total amount due for this ticket, including tax (same as the amount in the **Total** field at the bottom of the ticket screen).

**Special Ordered** - The amount due on the Special Orders of this ticket.

**Minimum Amount** - The minimum payment that you must receive from your customer on this ticket. If a Special Order is involved, a deposit may be required, depending on the amount set in the system defaults for special-ordered items. (If you have other than a Management level of access, COMPTON<sup>®</sup> will not accept entry of an amount less than this.)

**Type Payment** - The customer’s method(s) and amount(s) of payment on this ticket. All the fields except **Money** (cash) will ask for a number (i.e., check or credit card number), but it is not necessary to type in a number. Type the dollar amount paid by each method, using the decimal point only if you are given change. If the customer is not paying with cash, press *Enter* to skip the **Money** field and go on to the one desired.



**NOTE:** For payments on account, if you type a dollar amount in the **Money** field for an account customer, a **Comment:** field will appear beside the amount, where you can enter any special notation (up to 25 characters) that you want to be included on the End of Day Transaction file printout.

**Total Received** - The total amount of cash and/or other payments you have received from your customer on this ticket.

**Amount Change** - The amount of any change due on a cash transaction. In the example above, the customer paid \$20.00 cash and his change is \$9.52. Press *Enter*, the Electronic Cash Drawer\* (*optional*) will open, and the ticket is printed. The ticket will show the name of the operator who handled the sale.

\* The cash drawer opens only if money needs to change hands.

### Explanation of Screen Command Options:

- < > **Accept** - Pressing *Enter* accepts the payment entries to end and print the ticket.
- < ' > **Correct** - This command lets you make corrections to the payment entries.
- < U > **Undo** - If you need to enter more parts information, you can use this command to undo the payment entries, and then press the apostrophe ( ' ) key to go back to the ticket screen:

### Printing Estimates

COMPTRON® allows you to produce printed estimates. When all the line items are on the ticket, instead of choosing < E > (uppercase) for **End Ticket**, use < e > (lower-case) for **Estimate**. If you press C, you will be prompted for customer information. This is added to the Customer file (if not already there) for later reference.

When you press *Enter*, the ticket prints, showing the word **E S T I M A T E** on it. After you print an estimate, you may want to place that ticket on Hold for later reference.

### Recording Lost Sales

A customer may request parts you do not stock and refuse to wait for them to be ordered. This is considered a *lost sale*. COMPTRON® keeps track of the sales you lose so you can determine whether to stock these parts.

After displaying the information on a part, the top of your screen shows the option < L > **Lost Sale**. Type L. In the middle of your screen is the prompt **Reason For Lost Sale**. Type in the reason. If the part is not in your Stock file or the price book, COMPTRON® asks for the necessary information to record the lost sale.

Continue by pressing *Enter* to add more items to your ticket. Pressing the apostrophe key ( ' ) takes you back to the password prompt.

A Lost Sales Report prints from the **Management Reports** menu. (*Refer to Chapter 11.*)

## Hold Tickets

The purpose of creating a Hold ticket is to build a ticket over time. A ticket is kept in suspense until the ticket is complete. Parts may be added or taken off a Hold ticket at any time. When it is complete, the Hold ticket is ended. This is a good way to keep track of parts sent to the Service department.

When you create a Hold ticket, you can use the < **M** > **Memo** command to add a note (Memo page) to it. There you can explain why an item is being held, say when you expect to end the Hold ticket, add information on credit or shipping, etc. If a Memo page exists for a Hold ticket record, the < **M** > option on the menu bar will flash, alerting you to check the Memo for notes. You can also edit the Memo page. To see a **Help** screen, press the *F2* key.



**NOTE:** *When a Hold ticket is ended, the Memo for that ticket is deleted. (A Memo page will stay with the record to which it is attached, but only for as long as that record is in the system.) Therefore, information that you want to keep indefinitely should be added as a Memo page for the Customer record.*

If a part is not in stock, you have the option to order it on a Hold ticket. If you choose to **Order** a part for which COMPTRON<sup>®</sup> does not find a record in the Stock file or on a Lost Sale action listing (i.e., you have to type in all the information about the part), the system will automatically create a stock record for that part.

As soon as you have entered the part quantity on the Hold ticket, a **Category** prompt will appear on the screen, with the cursor located directly beneath it (see illustration on page 1-13). You may now enter a valid part category for the newly created stock record, or use the slash < / > **Search** command to scroll through the Category file and select a category for the part. If you want to skip entering a category, press *Enter*, and COMPTRON<sup>®</sup> will assign the default category “ZZ” to the new stock record.

If you choose to **Sell** a part that is not already listed in the Stock file, then as soon as you enter the quantity on the Hold ticket, COMPTRON<sup>®</sup> may display the prompt “Create Stock Record (Y/N)?” on the screen (as illustrated on page 1-14), allowing you to tell the system **NOT** to create a new stock record for that part number/vendor.

Any new stock records created on a Hold ticket with a default “ZZ” category will appear on the Category Adjustment Report, which prints as part of the End of Day. You can also print this report by selecting **Option 3, Category**, from the **Stock Reports** menu. (See the *Category Option* heading under the *Stock Reports* section of Chapter 9, *System Reports*.) Management uses the report to resolve “ZZ” stock categories to more meaningful values.

With COMPTRON<sup>®</sup>, you are able to take a *deposit* on a Hold ticket. If you want to place a deposit on a Hold ticket: at **VN** (vendor), type 95. You will see the words **Deposit Hold** in the **Part Number** field. Type the description and deposit amount. When the ticket is put on Hold, a ticket printout shows the deposit collected. You may also give a *refund* on a Hold ticket. This works exactly the same way, except use **VN 96**.



Before you finish creating the Hold ticket, type a four-digit Hold ticket number (usually the same number as the Service department's last four digits on the work order) to identify it, and press *Enter*. Note this number so you can easily find the ticket later. The screen clears and the ticket is stored in memory.



**REMEMBER**, the parts on a Hold ticket are **TAKEN OUT OF STOCK**, so you should not use Hold tickets just to save lists of parts for customers who are unlikely to come back.

## Find Hold Ticket Option 1-2

After you type your password, you will see the **Counter Operations** menu:

### Counter Operations Menu

Counter Operations

Select

1. Create Ticket
  2. Find Hold Ticket
  3. Account Payment
  4. Special Orders
  5. Repair Order Payment
  6. Repair Order Parts
  7. Service Menu
  8. Parts Menu
- ' Exit

Select **Option 2, Find Hold Ticket**. The message Hold Ticket Number or <S> Search appears. If you know the Hold ticket number, type the number. (This is the four-digit number assigned to the Hold ticket.) If you do not remember the Hold ticket number, use the < S> **Search** option.

### The Search Command

Type **S** to search for a Hold ticket. You will see the following menu:

### Searching for Hold Ticket Menu

Searching for Hold Ticket

Select

1. Ticket Number
  2. Customer Name
  3. Customer Number
  4. Department
  5. Operator
- ' Exit

### Explanation of Menu Options:

- < 1> **Ticket Number** - Searches for a Hold Ticket by ticket number. Type any number below the number you are looking for and COMPTRON® gives you a list of all Hold Tickets from that number to the end of the file.

- < 2> **Customer Name** - Searches for Hold Tickets by the customer's name in alphabetical order. It begins the search from the letter or name you type, and displays a list to the end of the file.
- < 3> **Customer Number** - Searches for Hold Tickets by the customer numbers in numeric sequence. Type the customer number (up to 12 alphanumeric characters) and COMPTRON<sup>®</sup> gives you a list of all Hold Tickets from that number forward in numeric sequence.
- < 4> **Department** - There are five departments to choose from: **Parts, Service, Warranty, Wholesale, and Internal.** COMPTRON<sup>®</sup> displays a list of all the Hold Tickets for the department selected, beginning with the first one on the file.
- < 5> **Operator** - Type the number of the operator who put the ticket on hold, and a list shows all Hold tickets by the operator selected.

## Account Payment Option 1-3

Customers may want to know the balance of their accounts, or they may want to make payments or refunds on the account.

Type your password and press *Enter* to bring up the **Comptron Menu**. Then select **Option 1** to access the **Parts Menu**, and **Option 1** again to invoke the **Counter Operations** menu. From there, select **Option 3, Account Payment**, and you will be prompted to enter the customer's name, or press *Enter* and type the account number (up to 12 alphanumeric characters).



You may not know how to spell the customer's name. Type the first characters and COMPTRON® finds the first match. You may then type **N** for **Next** and quickly find the customer you want. The following screen will appear with your customer information:

Account Payments Screen

< > Accept <N> Next <R> Retry <'> Exit < >			
Name	BOB BROWN	Account #	0000BCL-1021
Street	618A PINE ST.	Date Charged	3/27/2004
City	CLEARWATER	Date Credited	3/27/2004
State	FL	Zip Code	34616
		Credit Limit	\$1,000.00
Hm Phone	727-414-4667	Balance	\$102.76
Wk Phone			

If the customer just wants the balance, read the balance shown, and press < ' > to **Exit**. If the customer wants to pay or get a refund on the account, press *Enter* to proceed with it.

If the account contains a credit balance (i.e., the store owes the customer), the top of the screen will show the options < > **Payment** and < R > **Refund**. Press *Enter* to make a payment, or choose **R** to refund the credit.

If a cash customer is due a refund but does not have a regular account with you, you can still keep the monies in your store by building a *Temporary* in-store account credit under the customer's name for use against a future purchase. When that credit is used, COMPTRON® will remove the account.

After typing the payment or refund amount, you have the option to **Accept**, **Correct**, or **Undo**.



**NOTE:** If you type a dollar amount in the **Money** field for an account customer's payment or refund, a **Comment:** field will appear beside the amount, where you can enter any special notation (up to 25 characters) that you want to have included on the End of Day Transaction file printout.

After accepting the amount, the Electronic Cash Drawer\* (*optional*) will open, and the ticket is printed.

\* The cash drawer opens only if money needs to change hands.

## Special Orders Option 1-4

This option is a shortcut to the **Special Order Processing** menu, and is available to operators with a COMPTRON® access level of 3 or greater. The **Special Orders** option is used to process and keep track of all Special Orders placed with vendors for items that customers wanted but you didn't have in stock.

You can use this shortcut option to check on a Special Order if the customer inquires about its status by telephone or in person. You can also use this option to help a customer who comes to make a deposit on a Special Order or to pick it up. In addition, this option enables you to refund a deposit which a customer previously made on a Special Order, if that customer no longer wants to wait for the item. (*Refer to Chapter 3 for complete information on handling Special Order pickups, refunds, or deposits.*)

A Special Order may have been entered into COMPTRON® for the customer through **Counter Operations**, using either the < O> **Order** option in the Parts Information part of the **Create Ticket** process (*see page 1-13 of this chapter*), or the < H> **Hold Ticket** command later on (*see pages 1-20 and 1-24-1-26*). A third way that Special Orders can be placed is on a Repair Order from the Service department.

To check on a Special Order for a customer, select **Option 4** from the **Counter Operations** menu, and the following **Special Order Processing** menu is displayed:

### Special Order Processing Menu

```

Special Order Processing

Select █

1. All Types
2. Counter Ticket
3. Hold Ticket
4. Repair Order
' Exit
  
```

### Explanation of Menu Options:

- < 1> **All Types** - Displays all special-ordered items, regardless of where the order originated.
- < 2> **Counter Ticket** - Displays items special ordered on a regular counter ticket.
- < 3> **Hold Ticket** - Displays items special ordered on a Hold ticket.
- < 4> **Repair Order** - Displays items special ordered on a Repair Order.

Choose the first menu option to list all types of pending Special Orders; or if you can determine how the order was originally placed, you may select the appropriate one of the remaining options to list just the orders of that type. No matter which of the four options you choose from the **Special Order Processing** menu, a name input screen similar to the following example will appear, with the cursor on the **Last Name field**:

**Special Order Proc:  
Name Input Screen**

```

                                <'> Exit
Special Order Processing - Counter Tickets

                                Last Name _____

                                First Name           Initial

```

If you type a complete last name and press *Enter*, the cursor moves down to the **First Name** field. After you input the customer's first name and initial, press *Enter* and the screen displays information on that customer's Special Order, including the status. You can get a partial list of Special Orders by typing just the first letter of the customer's last name. To list **ALL** Special Orders in a category (e.g., Hold tickets), press *Enter* instead of typing a name, and a full **Special Order Processing** screen like this is displayed:

**Special Order  
Processing Screen**

```

< >   <'> Exit <N> Next <K> Pickup <R> Refund <D> Deposit <M> Memo <T> Toggle
Special Order Processing
Ln Phone Number Name           Description      Status  Ven  Number           Qty
1   428-1833 AUTO CO. INC.      SPOKE SET B9X  Its Here 000 2061968           18
2   821-2172 BAILEY, HAZEN      EXHAUST SHLD  Ordered 002 65634-81C           1
3   833-6557 BANG, TOM          PLVR-WMS BK L  Back-Ord 002 98261-92VW/002L    1
4   845-2362 BARNEY DARREL      AIR FILTER EL  Ordered 020 3400              2
5   485-3553 BARNETT, CARL      IDLE CABL-BAR Ordered 022 27-744          1
6   485-3553 BARNETT, CARL      THR.CABLE-BAR Its Here 022 27-742          1
7 314 946-2049 BAUER, TOM        HEADSET J&M   Its Here 026 HS134BJHSFF    1
8   833-6073 BEDFORD, BUDDY     CHAIN CAM100L Its Here 000 14401-958-003     1
9   384-2948 BETHEL, RICH       NUT FLANGE8MM Its Here 000 90309-428-731     4
10  359-2951 BILLINGSLEY, G     JS GRIPS LONG  Ordered 004 W28001-112     1
11  359-2951 BILLINGSLEY, G     CASE-STORAGE  Back-Ord 004 39012-3710       3
12  359-2951 BILLINGSLEY, G     TUBE,JOINT    Its Here 004 92190-3712       1
13 605 542-8145 BIVIENS LARRY      COVER,CAMSHFT Back-Ord 004 14025-1974       1
14  687-2148 BLAIR NATHAN       SS24V HELLFIR Its Here 015 559142           1
15  428-7757 BRADFORD, JED      ND SPARK PLUG Ordered 028 X24EPRZU9       4
16 410 962-1617 BRITAIN, KIM     WINDSHIELD    Cancel 014 070197         1
17  428-1143 BROOKS, LARRY      INSERT         Cancel 002 43959-86         2
18  428-1143 BROOKS, LARRY      O-RING         Its Here 002 68455-86         2
19  384-4141 BROWN, LIZ         LENS TURN SIG Its Here 000 33402-431-782     1

```

***Explanation of Screen Command Options:***

- < ' > **Exit** - To exit this screen and return to the **Parts Menu**, type ' .
- < N > **Next** - If the screen is full, type N to display the next screen.
- < K > **Pickup** - Type K if the customer is picking up all received items.

< **R**> **Refund** - Type **R** if the customer wants a refund on all or part of the money paid on the item(s). If this is a cash customer who does not have a regular account with you, you can still keep the funds in your store by building a *Temporary* in-store account credit under the customer's name to apply against a future purchase. When the credit is used, COMPTRON® will remove the account.

< **D**> **Deposit** - Type **D** if the customer wants to make an additional payment on the item(s) ordered.

< **M**> **Memo** - Lets you add a note (Memo page) to a Special Order record, such as arrival date notes, special shipping information, backorder status, authorization numbers, etc. If a Memo page exists for a Special Order record, the < **M**> option on the menu bar at the top of the screen will flash, alerting you to check that Memo for notes. You can also edit the Memo page. A **Help** screen is available by pressing the *F2* key.



**NOTE:** *A Memo page will stay with the record to which it is attached, as long as that record stays in the system. Deleting a record will also delete the Memo attached to it.*

< **T**> **Toggle** - Enables you to go directly from this screen to a particular Special Order record to see more information about the order (and to edit it if necessary), and then return here.

## Repair Order Payment Option 1-5

Use this option to collect a payment (deposit) from a customer on a Repair Order that was set up in the Service department, or to refund a customer's deposit.

### Repair Order Deposit

To make a payment on a Repair Order, choose **Option 5** from the **Counter Operations** menu, and the **Find Repair Order** screen will appear:

#### Find Repair Order Screen

```

                                <'> Exit <S> Search
Find Repair Order

                                RO Number 

```

If you don't know the Repair Order number, type **S** to bring up this search menu:

#### Searching for Repair Order Menu

```

Searching for Repair Order

                                Select 

                                1. RO Number
                                2. Customer Name
                                3. Model & Year
                                4. VIN
                                5. Date Scheduled

                                ' Exit

```

Since your customer is there with you to make a payment, the easiest way to find the Repair Order is to select **Option 2** and enter the customer's name at the name input screen that appears (which looks and operates like the one for finding Special Orders). When you press *Enter*, the screen will display a **Repair Order** screen similar to the following:



## Repair Order Screen

```

                                <P> Payments <E> End RO <'> Exit < >
Repair Order

RO #      000176 Operator OPERATOR 4          Dt/Tm Sched  10/06/2003  1:10P
Status    IN PROGRESS                          Dt/Tm Prom   10/06/2003
Type Svc  RETAIL                                Call When Ready

Last Name  DEVAUX                               Model        FLHS           Year  89
First Name SERGE                               Initial      Make          HD
Address                                         VIN          1HD1FAL0LY505988
City                                             Engine #
State      Zip Code                            Lic/ID #      Odom.  45264
Home Phone                                         Stock #
Work Phone                                         Ext.          COLOR
=====
Parts      $67.43                               Tax           $4.38
Labor     $150.00                              Total        $221.81
Misc
Sub Total  $217.43                              Paid
Balance   $221.81

```

**Explanation of Screen Command Options:**

- < P> **Payments** - Allows you to enter a deposit or make a refund.
- < E> **End RO** - Ends the Repair Order (only if the status has been completed).
- < '> **Exit** - Leaves this screen.

**Field Descriptions:**

- RO #** - Repair Order number. This is assigned by COMPTRON® when all customer and vehicle data are complete and “accepted.”
- Operator** - This is the operator who created the Repair Order.
- Status** - < N> ot Started < I> n Progress < D> elayed < C> ompleted
- Type Svc** - < R> etail < I> nternal < W> arranty
- Dt/Tm Sched** - Date/Time Scheduled
- Dt/Tm Prom** - Date/Time Promised
- Call When Ready** - < Y> or < N>
- Last Name, First Name, Initial** - These are the key customer data fields used by COMPTRON® to search the Customer file.
- Address, City, State, Zip Code, Home Phone, Work Phone, Ext.** - Remaining customer data fields. (**Ext.** = work phone extension)
- Model, Year, Make** - These are the key vehicle data fields used by COMPTRON® to search the Vehicle file.
- VIN, Engine #, Lic/ID #, Stock #**, user-defined field (in this example, **COLOR**), and **Odom.** - Remaining vehicle data fields.

From the **Repair Order** screen, select **< P> Payments**, and you will see a payments screen similar to the following:

**Repair Order  
Payments Screen**

```

                                <C> Change <'> Exit < >
Repair Order Payments

RO #      000168 Operator OPERATOR 4          Dt/Tm Sched 10/02/2003 2:12P
Status    NOT STARTED                        Dt/Tm Prom  10/02/2003
Type Svc  RETAIL                             Call When Ready

Last Name  HARLEY DAVIDSON WARR              Model   XL883          Year  92
First Name                Initial           Make    HD
Address    918 THATCHER BLVD.
=====

Invoice Total    $148.70    Payments    $ .00    Balance    $148.
    
```

Next, select **< C> Change**, and if a payment was made before, the command options line at the top of the screen will change to offer two options: **< P> Payment** or **< R> Refund**, with **< P>** as the default. When you choose **< P> Payment**, the following **Enter Amount Received** screen appears, with the cursor in the **Cash** field (if there was no prior payment, this screen comes up immediately):

**Enter Amount  
Received Screen**

```

                                < > Continue <'> Exit < >
Enter Amount Received

RO Total          $148.70
Payments          $ .00
Balance           $148.70

Type Payment      Amount

Cash
Check
Visa
Mastercard
Other
    
```

Select **< > Continue**, and you can type in the payment information, using the *Enter* key to advance down to the appropriate payment type field(s). Whether you enter a full or partial payment, COMPTRON® will immediately display it in a new **Total Received** field below the **Type Payment** fields, followed by a **New Balance** entry. After you leave the last payment field (**Other**), COMPTRON® will offer these command options across the bottom of the screen:

< > Accept    <'> Correct    <U> Undo    < >

When you have accepted the payment information by pressing *Enter*, you will be asked:

Print Receipt Ticket? <Y or N>

If you select < Y> , COMPTRON® will print out a receipt ticket for your customer.

## Repair Order Refund

To make a refund on a Repair Order, use **Option 5** from the **Counter Operations** menu and follow the same search steps to reach the **Repair Order** screen shown on page 1-33. Then choose < P> **Payments**, as before, to get to the **Repair Order Payments** screen illustrated on the preceding page. At this payments screen, select < C> **Change**, then < R> **Refund**, and the following **Enter Amount Paid Out** screen appears, with the cursor in the **Cash** field:

Enter Amount  
Paid Out Screen

Enter Amount Paid Out		< > Continue <'> Exit < >
RO Total	\$125.90	
Payments	\$65.00	
Balance	\$68.90	
Type Payment	Amount	
Cash	\$65.00	
Check		
Visa		
Mastercard		
Other		
Total Paid Out	\$65.00	
New Balance	\$125.90	
		< > Accept <'> Correct <U> Undo < >

Type in the amount to be paid out (refunded), using the *Enter* key to advance down to the appropriate payment type field(s). As soon as you enter an amount in a field, COMPTRON® will display this amount in a new **Total Received** field below the **Type Payment** fields, followed by a **New Balance** entry, and a line of command options across the bottom of the screen, as shown in the sample screen above.

When you have accepted the refund information by pressing *Enter*, you will be offered the option of printing a receipt ticket. If a cash customer is due a refund but does not have a regular account with you, you can still keep the monies in your store by building a *Temporary* in-store account credit under the customer's name for use against a future purchase. When that credit is used, COMPTRON® will remove the account.

## Repair Order Parts Option 1-6

Use this option to add parts to an existing Repair Order or edit lines in a Repair Order.

To modify a Repair Order, choose **Option 6** from the **Counter Operations** menu, and the **Find Repair Order** screen will appear:

**Find Repair Order  
Screen**

```

                                <'> Exit <S> Search

Find Repair Order

                                RO Number 

```

If you don't know the Repair Order number, type **S** to bring up this search menu:

**Searching for Repair  
Order Menu**

```

Searching for Repair Order

                                Select 1

                                1. RO Number
                                2. Customer Name
                                3. Model & Year
                                4. VIN
                                5. Date Scheduled

                                ' Exit

```

You can use any of these options to find the Repair Order. Each option will display a screen asking for the starting search criteria; e.g., the customer name or vehicle model/year. If you don't remember the exact spelling of a name, just press *Enter*. If your search choice displays a list of possible Repair Orders for the date or vehicle entered, find the correct one and type its line number, then press *Enter*. A parts screen similar to the following will be displayed:

## RO Parts Screen

```

< > < > Continue  <E> Edit  <C> Cancel All  <P> Pick Ticket  <O> Orders
<'> Exit
===== RO # 001039  RETAIL =====
Ven Code  Part Number  Description  On Hand  Price
=====
      Cost  Qty  Cust #  Name  Date-Ord  On-Order  Back-Ord
=====
Ln Ven Part Number  Description  Qty Ty Pri %  Amount
1 000 08C35-A251L01  GN4 OIL 20W50 GAL  1 N  12.71
2 002 10014  CLAMP @10 1 I .60
3 002 10074  WORM DRIVE CLAMP @2 1 I 2.24
4 002 6157  THRUST WASHER @10 1 S 3 .12
5 002 11002  RETAIN RING @10 1 S 3 .46
6 002 26488-91  GEAR SHAFT 1 P 57.44
7 002 26434-91  O RING @10 4 E .92
8 002 26495-89  GASKET, OIL PUMP 883/1200 @2 1 P .81

Cost      $33.79  Subtotal      $75.30  Tax      $4.89  Total      $80.19

```

***Explanation of Screen Command Options:***

< > **Continue** - Moves to the **Ven** field and lets you enter parts data, similar to a Parts counter ticket, so you can **Sell** or **Order** parts.

If you choose to **Order** a part for which COMPTRON® does not find a record in the Stock file or on a Lost Sale action listing (i.e., you have to type in all the information about the part), the system will automatically create a stock record for that part. As soon as you enter the part quantity on the RO Parts ticket, a **Category** prompt will appear on the screen, with the cursor located directly beneath it (*as illustrated on page 1-13*). You may now enter a valid part category for the newly created stock record, or use the slash < /> **Search** command to scroll through the Category file and select a category for the part. To skip specifying a category, press *Enter*, and COMPTRON® will assign the default category “ZZ” to the new stock record.

If you choose to **Sell** a part not already listed in the Stock file, then when you enter the quantity on the RO Parts ticket, the system may display the prompt “Create Stock Record (Y/N)?” on the screen (*as shown on page 1-14*), allowing you to tell the system **NOT** to create a new stock record for that part number/vendor.

Any new stock records created on an RO Parts ticket with a default “ZZ” category will appear on the Category Adjustment Report, which prints as part of the End of Day. You can also print this report by selecting **Option 3, Category**, from the **Stock Reports** menu. (*See the Category Option heading under the Stock Reports section of Chapter 9, System Reports.*)

< S> **Scroll** - Allows viewing of additional parts lines that are not shown on the screen. (This option is present only if there are more than 12 parts lines on the Repair Order.)

< E> **Edit** - Subcommands are < E> **Edit Line** (change **Ven**, **Code**, **Part Number**, **Qty**, **Price**, or **Tax** field); < C> **Cancel Line** (remove the line); < M> **Move Line** (move line to a new line number); and < > **Exit** (leave the edit operation).

- < C> **Cancel All** - Cancels all parts lines on the Repair Order. You must have an adequate access level to use this option.
- < P> **Pick Ticket** - A Service Parts Request will be printed, similar to the following example, after you choose whether you want all parts lines printed or only the unedited lines. This will assist the Parts department in retrieving, selling, or ordering parts for the RO.

Example:

SERVICE PARTS REQUEST						
Operator: TOM BATEMAN	Date: 11/17/2004	Time: 4:26P	Page No. 1 of 1			
RO# 006621	Type Svc: Retail	Sched: 11/17/04	2:39P	Prom: 11/17/04		
Model	Yr Make	Lic/Id #	Engine #	VIN		
GN125EM	98 SUZUKI			JS1NF41A6M2100479		
Customer SIMPSON, REBECCA J.						
=====						
Ven Code	Part Number	Description	Qty	Type	Amount	Note
000 3535861	08C35-A251L01	GN4 OIL 20W50 GAL	1	N	12.71	_____
002 00000574	10014	CLAMP	@ 1	I	.60	_____
002	10074	WORM DRIVE CLAMP	1	I	2.24	_____

- < O> **Orders** - This option brings up a screen similar to the following, showing the status of the ordered parts:

RO Parts Status  
Screen

<'> Exit < >									
RO # 006621 Orders									
=====									
Ln	Ven	Part Number	Description	Qty	Tp	Action	PO #	Date	Op
6	002	26488-91	GEAR SHAFT	1	P	Ordered	8040	11/17/04	99
				1		Received	8040	11/17/04	99
				1		Picked Up	8040	11/17/04	99
7	002	26434-91	O RING	4	E	Ordered	8040	11/17/04	99
				3		Received	8040	11/17/04	99
				1		Backorder	8040	11/17/04	99
				3		Picked Up	8040	11/17/04	99
8	002	26495-89	GASKET, OIL PUMP 883/	1	P	Ordered	8040	11/17/04	99
				1		Received	8040	11/17/04	99
				1		Picked Up	8040	11/17/04	99

## **Service Menu Option 1-7**

Use this option as a shortcut to get to the **Service Menu** from **Counter Operations**.

## Parts Menu Option 1-8

---

Use this option to go back to the **Parts Menu**. It has the same effect as choosing the < ' > **Exit** option.



---

## Summary

This chapter described how to perform various functions at the Parts counter. These functions include:

- > Selling, ordering, and returning parts
- > Departmentalizing sales
- > Using Stock Kits
- > Substituting parts
- > Using the **Scroll** option
- > Printing estimates
- > Recording lost sales
- > Creating and finding Hold tickets
- > Looking up account balances and entering payments/refunds on accounts, Special Orders, or Repair Orders
- > Ordering parts for a customer
- > Adding parts to a Repair Order ticket
- > Using shortcuts to access the Special Order Processing and Service menus