

CHAPTER 10

System Maintenance

You use **System Maintenance** to set up and maintain files in your data base. You initially enter your data through **System Maintenance**. Then as your business changes, COMPTRON[®] changes with you.

New vendors, accounts, customers, parts, prices, etc. are all part of a growing business. Use **System Maintenance** for changing the parts you stock, your vendors, customer accounts, categories, etc.

Through reviewing the history on a given part, you can tell whether to restock it or increase the stock level. This review is critical to reducing dead inventory and investing your inventory dollars properly in fast-moving items. The historical information also allows you to spot the seasonal trends for different parts so you can order more effectively.

Having the right parts on the shelf at the right time can be achieved through the information available in **System Maintenance**. Use **System Maintenance** to customize COMPTRON[®] to your unique business ... and to enable COMPTRON[®] to grow with you.

This chapter corresponds to **Option 0** of the **Parts Menu: System Maintenance**.

Stock File 0-1

The Stock file contains a record for every item you stock. In order for COMPTRON® to work properly, you must first add your inventory into your Stock file. Once a record is added to your Stock file, you may change, delete, search, print a label, or go to the next record in your file. To access your Stock file, follow these steps:

From the **Parts Menu**, select **0** and you will see the **Maintenance** menu:

Maintenance Menu

```

Maintenance

                                Select 

                                1. Stock
                                2. Vendor
                                3. Customer
                                4. Vehicle
                                5. History
                                6. Special Order
                                7. Category
                                8. Cost Matrix
                                9. Hold Ticket
                                0. System Utilities
                                A. Zip Code
                                B. Serial Numbers

                                ' Exit
  
```

Then from the **Maintenance** menu, select **Option 1**, and the **Stock File** screen is displayed:

Stock File Screen

```

                                <N> Next  <S> Search  <A> Add    <M> Memo  <'> Exit  < >
Stock File  <P> Prev  <C> Change  <d> Delete  <L> Label  <H> Hist

Vendor #   003                                Quantity on Hand      12
Code      YOF                                Stock Level           25
Part #    1L9-13441-11-00                    Reorder Point        12
Sub Ven # 009   Sub Part # 140012

                                Multiples              1
                                Origin                   S
Description YM OE 1L9 OIL FILTER              Minimum Order Quantity 1
Part Status 1
SRA         Y                                Quantity on Order     13
                                                Quantity on Backorder

Last Cost           $2.00
Average Cost        $2.00                    Date Last Order       9/19/2005
Replace Cost        $2.30                    Date Last Sale

Matrix (Y or N)    <N>
Sugg List           $4.43                    Sales This Month
Percent Profit      40.2598                   Sales Last Month      6
Percent Markup      92.6086                   Sales Prev Month     10
  
```

Explanation of Screen Command Options:

- < N> **Next** - Displays the next part number in sequence. If you have done a search by vendor and part number and selected **N**, the next record is in part number sequence. This is also true with codes.
- < P> **Prev** - Displays the previous record in order, by part number or code.
- < S> **Search** - Searches for a particular part. You must type the vendor and code or part number. If the part is not in stock, the screen shows Record Not Found. A part has to be **ADDED** to the Stock file before **Search** can find it.
- < A> **Add** - Adds a part to your inventory in the Stock file. You must add your inventory into COMPTRON® before it will work properly. The **Adding Stock Options** screen appears and offers these choices:

Adding Stock Options Screen

```

                                < > Accept  <C> Change  <'> Exit  < >
Adding Stock Options

                                Enter Quantities      <Y>
                                Default Stock Level/ROP <N>
                                Print Labels           <Y>
                                Prices on Labels       <Y>

```

When adding parts, you can add only parts information, or parts and quantities. If the **Default Stock Level/ROP** (reorder point) is set to < Y> , the stock level is set equal to the on-hand quantity, and the reorder point is set to half the stock level. (This saves you having to stop as you add each one and figure how many to keep on hand and when to reorder. You can adjust default levels later when reordering.) You can also print a label and print prices on labels when adding a part.



NOTE: If you purchased the vendor's price book with COMPTRON® most of the information is automatically added after you type vendor and part number.

- < C> **Change** the information on a record. When you type **C** you will see these three command options:
 - < > **General Update** - Press *Enter* if you want to update any field for your part.
 - < Q> **Quantity Only** - Type **Q** if you want to change only the **Quantity On Hand, Stock Level, and Reorder Point** fields for your part.
 - < P> **Price Only** - Type **P** if you want to change only the **Cost, Sugg List, Matrix, or Percent Profit** fields for your part.



NOTE: These three options apply only when < C> **Change** is selected. If you are adding or deleting a part, these commands are not used.

- < **d**> **Delete** - d (lower-case) deletes this record from your Stock file after confirming the deletion.
- < **M**> **Memo** - Lets you add a note (Memo page) to the stock record, such as special technical information about the part, other related items needed, sales hints, etc. If a Memo page exists for a Stock file record, the < **M**> option on the menu bar will flash at the top of the screen, alerting the user to check the Memo for special 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 is in the system. Deleting a record will also delete the Memo attached to it.

- < **L**> **Label** - If you want labels for the part displayed, type L. COMPTRON® asks you for the quantity of labels wanted, and whether you want the price on the label (first time only). Labels can also be printed from the **Print Labels** option of the **Parts Menu** (see Chapter 4).
- < **H**> **Hist** - Lets you toggle on/off a display of three full years of sales history on this stock item. You can go directly from this screen to the **Part History** screen for this item (*described in the History File section of this chapter*).

Field Descriptions:

Vendor # - Each vendor is assigned a number (0-999). You should have a vendor list provided by your manager. (*See the Vendor File section of this chapter.*)

Code - Manufacturer's code or the code assigned to your part.

Part # - Part number assigned to a particular part by the manufacturer.

Sub Ven # — Sub Part # - These fields give you an option to sell like items or related items when working on the counter. The "sub" (substitute) item must be added to your Stock file if it is not already there.

Category - Category number (1-99) assigned to a particular item. A list of valid categories is available from your manager. (*See the Category section of this chapter.*)

Description - Since descriptions are displayed in numeric-alpha format (that is, first by number, then alphabetically), always enter the description the same way. By doing this, you enable like items to be grouped together. For example, when entering clothing, you might want to enter the size first:

Size 40 leather jacket
 Size 36 leather jacket with zippers
 Size 34 leather jacket
 Size 32 rain jacket

Part Status - This is an assigned letter or number showing whether the part is fast or slow moving. Some manufacturers assign the following symbol scheme to indicate part movement status:

- A - fastest
- B - faster
- C - fast
- D - discontinued
- Z - slow moving

Some manufacturers use numbers 1-9 to show the status of part movement, while other vendors employ different status codes. Your store may have specially assigned internal part status codes. The Slow-Moving Parts report (*see the History File Printouts section of Chapter 9, System Reports*) can help you decide when to return slow-selling parts to vendors. (*Refer to the How to Return Stock to Vendors section of the Appendix to this manual.*)

SRA - Stock Return Allowance: This code can be either a Y (yes) or N (no). It indicates whether an item can be returned for credit.

Last Cost - The cost you paid the last time you bought this part (historic cost).

Average Cost - This is the average of all costs paid for this item. Each time a part is received through **Order Receiving**, the new cost and quantity are computed into this average. It is used for inventory valuation reports.

Replace Cost - This is the most current cost of the item—what you would pay now to replace it. It is also the most current price book cost, provided that the **Update Inventory from Books** function has been run.

Matrix (Y or N) - If you want to use your matrix table for pricing, type Y. (*For more information, refer to the Cost Matrix section of this chapter.*)

Sugg List - This is the price the store is charging for an item. If you skip this field and are not using the matrix, enter the **Percent Profit** field value, and the suggested list price is calculated automatically.

Percent Profit - If you change the suggested list price, the **Percent Profit** value is automatically calculated by COMPTRON®. If you change the **Percent Profit** figure, the **Sugg List** figure is automatically calculated from the cost. Type the profit percentage without the decimal point. For example, 50% profit should be entered as 50, not .50.

Percent Markup - The amount added to the cost to cover overhead and profit in arriving at the selling price. For example, an item that cost \$1.00 retails for \$2.00 when the item is marked up 100%. (This doubles the price to give you a 50% profit).

Quantity on Hand - The number of items the store currently has in stock. It changes automatically when any operation (sale, return, etc.) affects the on-hand stock quantity.

Stock Level - Maximum number of parts you want to keep in stock.

Reorder Point - Number of parts in stock when an order should be placed. If the on-hand quantity reaches or falls below this number, COMPTRON® includes the part on a *Suggested Order* list. (Refer to Chapter 6, *Order Processing*, for more information).

Multiples - This represents the number of units, pieces, or sets in a *unit pack* (package) as ordered from the vendor. For example, a vendor might sell screws in small boxes of 10, with a dozen boxes to a package.

Origin - This indicates the type of transaction from which this particular stock record originated; i.e., the stock record was first created when this item was Sold, Ordered, Returned, or on a Lost Sale.

Minimum Order Quantity - This is the minimum number of unit packs you must purchase with each order.

Quantity on Order - Number of individual items (not unit packs) on order.

Quantity on Backorder - Number of items backordered from the manufacturer.

Date Last Order - Date the item was last requested on a stock order.

Date Last Sale - The date of the last sale of this item.

Sales This Month - Number of sales since last running the **End of Month**.

Sales Last Month - Number of sales during the prior month period.

Sales Prev Month - Number of sales during the previous month period.

When you reach the **Sales Prev Month** field, press *Enter* and the following menu bar appears at the bottom of your screen:

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

Check the accuracy of everything you have added or changed. If all the values are added or changed correctly, press *Enter*. If you have made a mistake, press ' at the beginning of each entry. Do this to back up until you reach your mistake. If you do not want to add the record or keep the changes you have made, type U and COMPTRON® will undo your changes to this record.

To erase a field, type a period (.) and press *Enter* at the beginning of that field.

When finished making changes or adding parts, **Exit** the record by pressing *Enter* at this screen. You can then make another selection.

Vendor File 0-2

The Vendor file contains information about your vendors, including name, address, phone number, etc. Several COMPTRON® functions access this file, so it is important to fill in as much vendor data as possible when adding vendors or changing records in this file. It is helpful to have a list of vendor numbers near each link terminal for reference. (This is printed by selecting **9**, then **7**).

From the **Parts Menu**, select **0**, then **2**. COMPTRON® may ask which printer to use, in case labels are wanted for this record. If the labels are in the printer connected to the link terminal, type **T**. If not, type **M** for main printer and you will see the **Vendor File** screen:

Vendor File Screen

```

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

Vendor Number    000                               Dealer Number    2098-182
Name             AMERICAN HONDA MOTOR CO., INC.   Phone Number    702-819-2811
Attn                                                     Fax Number      702-819-8211
Address          PO BOX 2918 700 VAN NESS AVE      Tax Number      123456
City            TORRANCE
State           CA
Zip Code        90509-1234
Remarks
Alt Vendor      001

```

Explanation of Screen Command Options:

- < N> **Next** - Displays the next vendor number in sequence. If you have done a search by vendor and selected **N**, the next record is in vendor number sequence.
- < P> **Prev** - Displays the previous record in order, by vendor number.
- < S> **Search** - Searches for a particular vendor. A vendor has to be **ADDED** to the Vendor file before **Search** can find it.
- < A> **Add** - Adds a new vendor to your Vendor file.
- < C> **Change** - Changes the information on a vendor record.
- < d> **Delete** - d (lower-case) deletes this record from your Vendor file after confirming the deletion.
- < M> **Memo** - Lets you add a note (Memo page) to the vendor record. If a Memo page exists for a Vendor file record, the < M> option on the menu bar will flash at the top of the screen, alerting you to check the Memo for special notes. You can also edit the Memo page. A **Help** screen is available by pressing the *F2* key.

Field Descriptions:

Vendor Number - The number assigned to your suppliers (vendors).

NOTE: *Vendors 0-9 are assigned by COMPTRON® for vendors that have special applications. (Check with Comptron Data to see if you have a special vendor.) Also, vendors 95-99 are reserved for use with COMPTRON®.*

Example: Vendor 99= labor, 98= misc., 97= paid out, 96= refund on Hold ticket, 95= deposit on Hold ticket. Use these vendors when in Parts **Counter Operations** only.

Name - Supplier (vendor) name.

Attn - If you deal with a particular person at a vendor company, type the person's name here; then if you print a label, the name appears on the label. The word "Attn" will not be included unless a name is entered here.

Address - The vendor's street address or post office box number.

City - The vendor's city or town.

State - Two-letter abbreviation of the vendor's state.

Zip Code - Five-digit zip code for the vendor's address.

Remarks - Enter here any additional information you want to type about this vendor (up to 30 characters in length).

Alt Vendor - The next vendor to search, if the same part numbers listed in your Stock file come from more than one vendor. An alternate vendor is usually shown to indicate that a less expensive version of the original equipment manufacturer's (OEM) part is available from another vendor.

Dealer Number - Most vendors give you a dealer number to use when ordering. Use that number here for orders.

Phone Number - When including an area code, do not type the brackets. You may use dashes (hyphens) because 12 digits are allowed.

Fax Number - More vendors now have a fax machine. You can type that number here. Follow the same rules as with phone number.

Tax Number - This applies to customers who have a resale tax number. If ANY characters are entered in this field, COMPTRON® will automatically treat all transactions for this customer as nontaxable. After you type the tax number, this menu bar appears at the bottom of the screen:

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

Check the accuracy of everything added or changed. If all the values added or changed are correct, press *Enter*. If there is a mistake, type ' at the start of each entry. Do this to back up one line at a time until you reach your mistake. If you do not want to **Add** the record or keep the changes made, type U and COMPTON[®] will **Undo** your changes to this record. To erase a field, type a period and press *Enter*. When you have finished making changes or adding vendors, **Exit** by pressing *Enter* at this screen. You may then make another selection.

Customer File 0-3

The Customer file is a marketing management tool for your business. It shows the last time a particular customer purchased parts or service. You may group this information to target your market for special promotions.

The information in the Customer file is entered through the screens described here, or through Parts **Counter Operations**. Always try to get complete customer information, whether for regular counter sales, Special Orders, or Repair Orders—once entered into the system, it will be available to all departments and COMPTRON[®] functions. You can allow customers to charge parts at your business and keep track of each one's name, address, phone number, and account information. Safeguards such as the credit limit have been established to help keep your business profitable.

To record your customer information, go to the **Parts Menu** and choose **0**, then **3**. You will see this **Customer File** screen:

Customer File Screen

```

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

L-Name WALDEN Customer # 0000000W2976
F-Name TIMOTHY Middle D Tax ID #
SSN 525-75-8637 DOB 7/17/69 Age 29 Tax Code
Dr Lic W197311 Lic State AZ Discount Type <R> Retail
Spouse Discount %
Attn Account Type <A> Account
Addr 2212 VIA CERRITO Credit Limit $2500.00
City SIERRA VISTA Amount Charged $257.82
County COCHISE Amount Paid $100.00
State AZ Zip Code 85635-3216 Balance $157.82
Hm Phone 520-452-7379 Fax # Credit Avail $2343.18
Wk Phone 520-459-1633 Wk Ext Last Charged 9/10/2004
Cellular Pager # Last Credited 9/10/2004
E-Mail Date Added 11/09/1999
Remark WILL PROBABLY BUY A 99 IN APRIL Last Sale 9/10/2004
Alert

1 2 3 4 5 6 7 8 9 10
Category S Vehicles Model Yr Make
1 454 2X4 04 ARCTIC CAT
2 CORSICA 99 CHEV

```

Explanation of Screen Command Options:

- < N> **Next** - Displays the next customer in alphabetical order by last name. If you have done a search by customer and selected **N**, the next record is in customer name sequence.
- < P> **Prev** - Displays the previous record in order, by customer last name.
- < S> **Search** - Searches for a particular customer. A customer has to be **ADDED** to the Customer file before **Search** can find it.
- < C> **Change** - Changes information on a customer record. Operators with a low access level (password) will be restricted from changing the **Account Type**, **Date Added**, and **Last Sale** fields.
- < A> **Add** - Adds a new customer to your Customer file.

- < **d**> **Delete** - d (lower-case) deletes this record from your Customer file after confirming the deletion.
- < **V**> **Vehicle** - Lets you access the Vehicle file related to this customer record, so you can update the vehicle information as needed.
- < **F**> **F&I** - Displays the customer's Finance and Insurance (F&I) AR detail history, if your system has AR-Integration with RealWorld software.
- < **L**> **Label** - If you want a mailing label for this customer, type L. Labels can also be printed from the **Print Labels** option of the **Parts Menu** (see Chapter 4).
- < **M**> **Memo** - Lets you add a note (Memo page) to the customer record, such as credit card information, "ship to" instructions, authorization, bad debts, etc. If a Memo page exists for a Customer file record, the < **M**> option on the menu bar will flash at the top of the screen, alerting the user to check the Memo for special notes. You can also edit the Memo page. Press the *F2* key to see a**Help** screen.



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

Field Descriptions:

Attn - If you type *Attn* or *c/o* before a name, the word "Attn" or "c/o" prints before the name and this becomes the first line of the label address. If you do not type *Attn* or *c/o*, this line becomes the second line of the address label.

Spouse - When you reach this field, the following window will open on the **Customer File** screen, allowing you to enter identifying information about the customer's spouse:

**Customer File Screen w/
Spouse Data Window**

```

                                <'> Prev <:> Skip <.> Erase
Changing Customer Record

L-Name  WALDEN                      Customer #  0000000W2976
F-Name  TIMOTHY                      Middle D    Tax ID #
SSN     525-75-8637                  DOB  7/17/69   Age 29   Tax Code
Dr Lic  W197311                      Lic State  AZ   Discount Type <R> Retail
Spouse                                     Discount %
Attn
Addr
City
County
State
Hm Pho  L-Name  [ ]                      $2500.00
Wk Pho  F-Name  [ ]                      $257.82
Cellul  SSN     [ ]                      $100.00
E-Mail  Dr Lic  [ ]                      $157.82
Remark  [ ]
Alert   [ ]

                                <'> Prev <:> Skip
                                - Spouse -
L-Name  [ ]                      $2343.18
F-Name  [ ]                      9/10/2004
SSN     [ ]                      9/10/2004
Dr Lic  [ ]                      11/09/1999
        [ ]                      9/10/2004

Category  S                      Vehicles  Model  Yr  Make
        1  454 2X4
        2  CORSICA  99  CHEV

```

Remark - Enter any information about this account that you want (up to 30 characters in length). You can use this field for additional vehicle information that won't fit in the **Model/Yr/Make** fields (*see next page*). **Do NOT** put vehicle data in the address or phone number fields.

Customer # - This field shows the account number you've assigned to the customer. It can accommodate up to 12 alphanumeric characters.

Tax ID # - If your account customer buys nontaxable items from you, or parts for resale, type the customer's tax number here. If you type a tax number or **ANYTHING** in this field, COMPTRON® will treat all transactions on that account as nontaxable. The customer's tax number will print on the ticket.

Discount Type - There are four ways of setting up reduced prices for your charge customers (if you do not want to give a customer a discount, leave this field blank):

R = Retail (selling price).

D = A percentage of discount from retail price.

N = No matrix — Do not use cost matrix.

c = Profit % — This computes a selling price using the *percentage of profit*.

d = Markup % — This computes a selling price using the *markup percentage*.

If you enter a discount type other than **R**, you are asked for a **Discount %**. Do not type the percent sign or a decimal.

Account Type - There are four options for setting up this customer's account:

N = Not a charge customer.

A = Account - Normal charge customer.

T = Temporary account - This option allows a customer to charge only one time (or credit a cash refund); then the field reverts to **N**.

I = Internal Account - An account for transactions between departments in the store. This does not charge tax on sales.

Credit Limit - This is the maximum amount this customer is allowed to charge. If the customer attempts to exceed the credit limit, COMPTRON® does not allow the sale to be completed until the manager has adjusted the credit limit, or the customer makes a payment.

Amount Charged - The total amount charged to this account.

Amount Paid - The total amount paid or credited to this account.

Balance - Compares amounts charged and paid. (Balance = Amount Charged minus Amount Paid).



NOTE: COMPTRON® will not delete an account customer record that still shows a balance due or a credit due.

Credit Avail - Amount of credit available to charge at this point.

Last Charged - The last date when the customer charged items on account.

Last Credited - The last date when the customer returned parts for credit on this account, or the last time a payment was made on this account.

Date Added - The program enters this date automatically the day the record is added. It remains the same unless the date is changed.

Last Sale - Date of the last sale to this customer.

Category - You have the option of defining 10 different categories to help identify your customers. Using these categories, you will be able to design your report printouts and target promotional mailings to suit your preferences.

Vehicles - Enter a count of this customer's vehicles, to allow more rapid access to the next customer record.

Model/Yr/Make - These fields identify this customer's primary vehicle by make, model name/number, and year. You can use the **Remark** field above for additional vehicle data that won't fit here. Do **NOT** put vehicle information in the address or phone number fields.

You have the option to: < > Accept <'> Correct <U> Undo
(after adding or changing the record).

Vehicle File 0-4

Vehicle information is required to schedule appointments or create Repair Orders. You may choose to enter vehicle information at this time, or later when scheduling appointments or creating Repair Orders.

As in the case of Customer file data, Vehicle file information may be added from the **Appointment** screen or the **Repair Order** screen, both accessed through the **Service Menu**. The following is an example of the **Vehicle File** screen that will appear, whether you access it from the **Service Menu** or from the **Parts Menu (Option 0, then 4)**:

Vehicle File Screen

```

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

Model          Year          Make          Date Added
VIN
Engine #
Lic/ID #       Key #
Stock #        UserDef4
UserDef1       UserDef5      Odometer
UserDef2       Amount1       Date Read
UserDef3       Amount2       Service Due:
                                   Odometer
Last Name
First Name     Initial
Remark
Recommended Service

```

For field descriptions, refer to the Build Your Vehicle File section of the COMPTRON® Service Module.

History File 0-5

COMPTRON® tracks the number of items sold every month. At the end of each month, it stores the total number of each item sold in the History file. This helps to track seasonal fluctuations in inventory demand. This file updates each time after running **End of Month** processing. If an item is deleted from the Stock file, the history remains in the History file for three months, just in case a stock record was deleted by accident. From the **Parts Menu**, select **Option 0**, then **5**, and the **Part History** screen will be displayed as follows:

Part History Screen

Part History													
<N> Next <S> Search <M> Memo <'> Exit < > <P> Prev <C> Change <d> Delete													
Vendor	Part Number				Code	Description							Cost
003	1L9-13441-11-00				YOF	YM OE 1L9 OIL FILTER							\$2.00
05	05	05	05	05	05	04	04	04	04	04	04	This	
Jun	May	Apr	Mar	Feb	Jan	Dec	Nov	Oct	Sep	Aug	Jul	Year	
12	15	10	5	1	1	2	3	6	9	11	13		
04	04	04	04	04	04	03	03	03	03	03	03	Last	
Jun	May	Apr	Mar	Feb	Jan	Dec	Nov	Oct	Sep	Aug	Jul	Year	
10	14	11	4		1		1	5	11	10	12		
03	03	03	03	03	03	02	02	02	02	02	02	Prev	
Jun	May	Apr	Mar	Feb	Jan	Dec	Nov	Oct	Sep	Aug	Jul	Year	
9	12	8	3	1	*	*	*	*	*	*	*		
Part	M T D			On	On	Back	Stock	Reord					
Status	Multiples			Sales	Hand	Order	Order	Level	Point				
	1			12	13	14	0	25	12				
* = No History on Part													

Explanation of Screen Command Options:

- < N> **Next** - Goes to the next record in the History file.
- < P> **Prev** - Goes to the previous record in the file.
- < S> **Search** - Searches for a record by vendor, or vendor and part number.
- < C> **Change** - When you type C, you change history of this record only. The other fields are changed in the Stock file.
- < d> **Delete** - Allows you to delete this record's history, but first asks if you want to delete the stock record also. You must answer Y (Yes) to delete the stock record also, or you cannot delete this history.
- < M> **Memo** - Lets you add a note (Memo page) to the history record, similar to stock record comments. If a History Memo page exists, the < M> option on the menu bar will flash, alerting you to check the Memo for special notes. You can also edit the Memo page. To see a **Help** screen, press the F2 key.



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

- < '> **Exit** - Leave this record and go to the **Maintenance** menu.

When you add a part into your Stock file, it is automatically added to the History file. The History file is updated each time you run the **End of Month** program. (Refer to the *Month End Processing* section at the end of Chapter 7.)

For each vendor/part number, there are three rows of numbers representing the sales for each month of the past three years. Directly below the two-digit year indicator is the month name, and below the month is the number of sales recorded in that particular month and year.

The rows are identified in the far right column as `This Year` (the most recent/current 12-month period's total sales), `Last Year` (total sales for two years ago, the 12-month period that preceded this year), and `Prev Year` (total sales for three years ago, the least current 12-month period, which preceded last year).

A blank record indicates that there were no sales for this month. An asterisk (*) indicates that the item was not in your Stock file for the month shown.

Special Order File 0-6

The Special Order file is for reference only. It contains the information about a Special Order. If for some reason you can't find a Special Order, check here for part information, customer information, and payment amounts.

From the **Parts Menu**, select **Option 0**, then **6**, and the following **Special Order File** screen displays:

Special Order File
Screen

```

Special Order File      <N> Next  <S> Search  <d> Delete  <'> Exit  < >
                       <P> Prev  <C> Change  <L> Label  <M> Memo

Ticket Number  002222  (Hold Ticket)          Date Created      7/06/2002
PO Number      4860                Date Changed      7/06/2002
Vendor         000                Last Ticket       002222
Part Number    87121-002-810      Operator          02
Code           0012633
Description    EMBLEM RIGHT          Department        <P> (Parts)
Priority       <0> (NORMAL - NO PRIORITY)  Tax Type         <T> (Taxable)
                                           Status          <O> (On Order)
                                           Payment Type    <T> (Tender)

Customer #
Last Name      SMITH
First Name     JERRY                Initial
Hm Phone      909-684-5646                Qty Ordered       1
Wk Phone      909-686-2739      Ext. 105          Cost Each         $10.00
Address       2143 S. MAIN ST          Retail Price      $14.93
City          RIVERSIDE                Amount Charged    $14.93
State         CA      Zip Code  92114

```

Explanation of Screen Command Options:

- < N> **Next** - Goes to the next record in sequence.
- < P> **Prev** - Goes to the previous record in sequence.
- < S> **Search** - Allows you to locate a record by ticket number, PO (purchase order) number, vendor, customer number, or last name.
- < C> **Change** - Allows you to change the information on this record, except for the ticket or PO number. At times you might accidentally receive a part which was cross-shipped or backordered, or fail to charge a part to a customer or internal account. This enables you to correct the file record. However, if the customer has paid a deposit, it will not be possible to change the payment type to "on account" or "picked up" without first refunding the deposit.
- < d> **Delete** - Removes this record from the Special Order file. This cannot be done if the customer paid a deposit and it has not been refunded.



NOTE: If the record belongs to a Hold ticket, deleting this record does not remove the record from the ticket. Go back into **Parts Counter Operations** and cancel this line from the Hold ticket.

- < L> **Label** - Prints a mailing label for this customer. Labels can also be printed from the **Print Labels** option of the **Parts Menu** (refer to Chapter 4).

< M> **Memo** - Lets you add a note (Memo page) to the 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 file record, the < M> option on the menu bar will flash at the top of the screen, alerting you to check the Memo for special notes. You can also edit the Memo page. Pressing the F2 key will access a **Help** screen.



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

< ' > **Exit** - Returns to the **Maintenance** menu.

Category File 0-7

The Category file allows grouping inventory items together in useful ways for your store operations. By listing like items together, you see the stock status for a group all at once, even when the items have different vendors. You can quickly locate a part in question, or cross-reference your inventory so you can tell a customer about your selection of the accessory he's interested in without having to go check shelves or display racks. You can print physical inventory worksheets for each category, print a suggested order to see if particular categories should be ordered (to take advantage of vendors' special sales), or get reports to check how well or poorly certain categories are moving. Up to 99 categories can be entered, but only one category is allowed per item.

It is very important to set up the categories ahead of time so that when you add inventory to the Stock file, you can type its category at that time. This saves time later. Below is a sample list of typical categories to help you determine what category titles will be useful in your store.

No.	Type	No.	Type
00	ATV Tires	08	Batteries
01	Dirt Tires	09	Lubricants
02	Street Tires	10	T-shirts
03	Clothing	11	Spark Plugs
04	Helmets	12	Gloves
05	Tubes	13	Books
06	Chain	14	Wax/Cleaners
07	Sprockets	15	Caps/Hats

To enter your categories into COMPTON[®], select **Option 0**, then **7**, from the **Parts Menu**, and you will see this **Category File** screen:

Category File Screen

```

<N> Next  <S> Search  <A> Add  <'> Exit  < >
<P> Prev  <C> Change  <d> Delete

```



```

Category      00
Type          TIRES
Remarks      USE FOR ALL ON/OFF ROAD TIRES

```

Field Descriptions:

Category Number - The reference number of the category displayed in your files.

Type - The description or type of category that this number represents.

Remarks - Any remark you would like to add regarding this category, such as an explanation of its scope.

Cost Matrix 0-8

COMPTRON® allows three ways to produce the retail price (selling price) of an item. One way is to type the retail price, and COMPTRON® shows the percent profit; another is to type the percent profit, and COMPTRON® shows the retail price. The third way is to have COMPTRON® use a look-up table (cost matrix).

The cost matrix is a valuable tool and, if used properly, helps increase profits in your business.

A cost matrix is set up differently for each vendor. Each item may be switched to use any of the three pricing options. This is another way COMPTRON® is leading the industry.

From the **Parts Menu**, select **0**, then **8**. A **Cost Matrix** screen similar to this appears:

Cost Matrix Screen

<N> Next <S> Search <A> Add <'> Exit < > <P> Prev <C> Change <d> Delete <D> Duplicate							
Vendor: 099							
Ln	From	To	Times	Ln	From	To	Times
1	\$.10	\$.25	4.00	2	\$.26	\$.50	No Matrix
3	\$.51	\$1.00	3.00	4	\$1.01	\$2.50	2.60
5	\$2.51	\$5.00	2.50	6	\$5.01	\$10.00	2.50
7	\$10.01	\$15.00	No Matrix	8	\$15.01	\$20.00	2.50
9	\$20.01	\$25.00	2.50	10	\$25.01	\$50.00	2.00

Explanation of Screen Command Options:

- < N> **Next** - Goes to the next vendor's matrix on file.
- < S> **Search** - Asks for the vendor's matrix that you want.
- < A> **Add** - Lets you add a new matrix for a vendor.
- < C> **Change** - Allows you to change the values in the matrix.
- < D> **Duplicate** - Allows you to copy (duplicate) an existing vendor's matrix to a new vendor's file. This saves building a new matrix for each vendor. Also, if just a few items need changing for a different vendor, duplicate this matrix to the new vendor and use the < C> option to make the changes.

Field Descriptions:

Vendor - The matrix only applies to this vendor.

Ln - A reference number for each matrix element.

From - The starting cost for this matrix range. COMPTRON® automatically enters this value based on the last **To** field value plus one cent.

To - This is the ending cost for this matrix range. This is typed by the operator setting up the matrix. This value must be greater than the previous **From** field value.

Times - This is the multiplier factor used to calculate the list price. *Example:* If an item cost \$10.00 and the **Times** (multiplier factor) is 2, then the list price is \$20.00 and the percent profit is 50%. By typing No Matrix (or 0), this cost range is not included in the matrix.



NOTE: *The multiplier should be 1 or greater. Zero implies no matrix.*

Hold Ticket File 0-9

After building a Hold ticket in Parts **Counter Operations**, you can set up the ticket with different options. Some of these options include the type of payment, operator, discount type and percentage, etc. After you have built the ticket and placed it on hold, with COMPTRON[®] you can change fields on the ticket. This section shows you how.

From the **Parts Menu**, select **0**, then **9**.

You will see a screen asking you to enter a ticket number. If you do not know the Hold ticket number, you can select **< S> Search** to list the Hold tickets and search for the one you need.

Type **S** and the following **Searching for Hold Ticket** menu appears:

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** - This searches for Hold tickets by ticket number. Type any number below the number you are seeking, and COMPTRON[®] lists all Hold tickets from that number to the end of the file.
- < 2> **Customer Name** - Searches for Hold tickets by your customer's name in alphabetical order. It begins the search from the letter or name you type and lists all Hold ticket names from there to the end of the file.
- < 3> **Customer Number** - You can also search for a Hold ticket by the number assigned to your customer. Type the customer number and COMPTRON[®] lists all Hold tickets from that number forward in order.
- < 4> **Department** - There are five departments from which to choose: Parts, Service, Warranty, Wholesale, and Internal. COMPTRON[®] lists the Hold tickets for the department selected, beginning with the first one.
- < 5> **Operator** - Type the operator who put the ticket on Hold, and COMPTRON[®] lists all Hold tickets prepared by this operator.

After getting a list of Hold tickets, choose the one that you want by selecting the line number of that ticket shown on the left side of the screen.

The information on your Hold ticket is displayed on this type of screen:

**Change Hold Ticket
Screen**

```

                                <C> Change <'> Exit < >
Change a Hold Ticket
Hold Ticket                               Merchandise
Operator                                   Deposits
Payment Type          T (Tender)           Refunds
Customer Number                                             Paid Outs
Department            P (Parts)            Miscellaneous
Discount Type         R (Retail)           Labor
Discount (%)          %                    Total Amount
Phone Number                                             Total Lines
Last Name
First Name                               Initial

```

Explanation of Screen Command Options:

< C > Change - Allows changing fields on the left side of the screen, except the Hold ticket number. The right side of the screen is for reference only.

< ' > Exit - Returns to the **Maintenance** menu.

Field Descriptions:

Hold Ticket - The number assigned to this ticket by the operator.

Operator - The operator who created the Hold ticket.

Payment Type - Options: **< A >** On Account; **< T >** Tender (cash transaction)

Customer Number - The customer's number assigned to this Hold ticket.

Department - The options are **< P >** Parts department; **< S >** Service department; **< H >** Wholesale; **< I >** Internal; **< W >** Warranty.

Discount Type - The options are **< R >** Retail **< D >** Discount %; **< c >** Profit %; **< d >** % Markup.

Discount (%) - If you select a discount type other than **< R >** Retail, this is the percentage of that discount.

Phone Number - Customer's phone number.

Customer Name - Customer's name.

Merchandise - Total dollar amount of parts (items) sold on this ticket.

Deposits - Total dollar amount of deposits (Vendor 95).

Refunds - Total dollar amount of refunds (Vendor 96).

Paid Outs - Total dollar amount of “paid outs” (Vendor 97).

Miscellaneous - Total dollar amount of miscellaneous entries (Vendor 98).

Labor - Total dollar amount of labor.

Total Amount - Total ticket amount.

Total Lines - Number of lines on this ticket.

System Utilities 0-0

Several different utilities are available with COMPTRON®. These are separate from the inventory control system, but are nice to have available.

From the **Parts Menu**, select **0**, then **0**. This **System Utilities** menu appears:

System Utilities Menu

```
System Utilities

Select █

1. Backup the System
2. Open the Cash Drawer
3. Reprints
4. System Diagnostics
5. Edit Store Headers
6. User Defined Fields
7. Add a Price Book
8. Master Book

' Exit
```

Explanation of Menu Options:

- < 1> **Back up the System** - In the past, doing a backup was a long and tedious process, but not any more. Just insert your cartridge tape and select this option. Answer Y when asked if your tape is ready, and in a few minutes you're done.
- < 2> **Open the Cash Drawer** - Some businesses have an electronic cash drawer incorporated into the computer system. When you select this option, the drawer opens. (*Call Comptron Data for purchase information about the cash drawer.*) Any operator opening the cash drawer from this menu is tracked on the End of Day Report.
- < 3> **Reprints** - Choosing this option brings up the following submenu so that you can reprint various reports and forms:

System Reprints Menu

```
System Reprints

Select █

1. Counter Tickets
2. Purchase Orders
3. Inventory Work Sheets
4. Inventory Changes Report
5. End of Day Report
6. End of Month Report

' Exit
```

For the first two options on the **System Reprints** menu, the system will display the last ticket or PO number that was printed, then ask which number you need to reprint. For options 5 and 6, you may be asked whether to use the main printer or the printer connected to your link terminal. **Option 5** on the **System Reprints** menu, **End of Day Report**, brings up the following submenu:

End of Day Reprints Menu

```
End of Day Reprints
```

```
Select █
```

1. End of Day Report
2. "ZZ" Report
3. Received Parts Report
4. Cash Out Work Sheet
- ' Exit

For the first two options on the **End of Day Reprints** submenu, **End of Day Report** and **ZZ Report**, you may first be asked whether you want the reprints sent to the main printer or your link terminal printer. For the third and fourth options, **Received Parts Report** and **Cash Out Work Sheet**, you will first be prompted to select whether to send the output to a printer or display it on the screen.

Next, for all four options on the **End of Day Reprints** submenu, a screen like this example will be displayed, offering you four report choices, from the most recent to the oldest:

End of Day Reprints Screen

```
End of Day Reprints
```

```
Four Reports Available  1=Most Recent - 4=Oldest
```

```
Select  <1-4>  <'> Exit
```

The Appendix to this manual describes another method for reprinting missing End of Day reports, capable of producing a more complete output than that yielded by **Option 5** above.

< 4> **System Diagnostics** - This option on the **System Utilities** menu displays technical information about your system, as well as a list of the manufacturers' price books installed on your system, and the date they were created. (*Call Comptron Data to request a complete list of available books.*) This information is helpful to Comptron personnel when you call for technical support.

When you choose this option, you will first be prompted to select whether to send the output to a printer or display it on the screen. Then a **System Diagnostics** screen similar to the following example will be displayed:

**System Diagnostics
Screen**

```

System Diagnostics                                     Tue Oct 12 07:24:32 MST 2004

Comptron Serial Number:    (Missing)                Service:           Yes
Operating System:         SCO_SV 3.2v5.0.5          Bar Code:         No
Release Version:          (Missing)                Sales:           Yes (O=N/F=N)
Release Date:             (Missing)                Mail List:       No
Release Installed:        (Missing)                Real World:      Yes
Last Backup:              (Missing)                Integration:     Yes
BikeTrak:                 Yes                                           Multi-Company:  Yes
Cobol Run-Time Version:   4.2.0

Communications:           polaris

Price Books:

Book Name                 Vendor(s)          Book Date
ACERBIS                   100                (Missing)
CUSTOM CHROME             008, 088          (Missing)
HELMET HOUSE              017                (Missing)
HONDA MOTORCYCLE         000                (Missing)
HONDA POWER               001                (Missing)
LOCKHART & PHILLIPS USA   053                (Missing)
PARTS UNLIMITED          010                (Missing)
POLARIS INDUSTRIES       034                (Missing)
TUCKER-ROCKY/NEMPCO     009                (Missing)
WESTERN POWER SPORTS     035                (Missing)
WHITE BROTHERS           051                (Missing)

```

< 5> **Edit Store Header** - This **System Utilities** menu option lets you tailor how your store's header (name, address, and phone number) will be laid out for printing your forms and displaying at the top of the main COMPTRON® menus on each department's terminals in your store. When you select this option, an **Edit Store Headers** submenu appears, as illustrated on the following page, which lets you choose the departments for which you wish to customize your store header:

Edit Store Headers Menu

```

Edit Store Headers

                                Select █

                                1. Parts
                                2. Service
                                3. Sales

                                ' Exit
    
```

Option 1 on the **Edit Store Headers** submenu displays the **Edit Parts Headers** screen illustrated on the next page, for you to customize your Parts department headers. The first section is for choosing how COMPTRON® will display your store's header at the top of the main **Parts Menu** on the terminals in your store. The second section shows how the header will be centered at the top of your counter tickets, and the third shows how it will look on your purchase orders.



NOTE: Do not try to center your store header text manually. COMPTRON® centers the lines automatically.

Edit Parts Headers Screen

```

                                <C> Change  <'> Exit  < >
Edit Parts Headers

--Parts Menu-----
                                SMITH ACTION SPORTS
                                22 BROADWAY
                                RIVERSIDE, CA 92500
                                PHONE: (909) 682-2500

--Tickets-----
                                SMITH ACTION SPORTS
                                22 BROADWAY
                                RIVERSIDE, CA 92500
                                PHONE: (909) 682-2500

                                Have a Great Day!

--Purchase Orders-----
                                SMITH ACTION SPORTS
                                22 BROADWAY
                                RIVERSIDE, CA 92500
    
```

Option 2 on the **Edit Store Headers** submenu displays the following **Edit Store Headers** screen, for tailoring your Service department headers. The first section is for choosing how COMPTRON® will display your store's header at the top of the main **Service** menu, and the second section shows how the header will look on your Repair Orders.

**Edit Store Headers
Screen**

```

                                <C> Change  <'> Exit  < >
Edit Store Headers

--Service Menu-----
                                SMITH ACTION SPORTS
                                22 BROADWAY
                                RIVERSIDE, CA 92500
                                PHONE: (909) 682-2500
--Repair Orders-----
                                SMITH ACTION SPORTS
                                22 BROADWAY
                                RIVERSIDE, CA 92500
                                PHONE: (909) 682-2500

                                Have a Great Day!
  
```

Option 3 appears on the **Edit Store Headers** submenu only if you have Comptron Data's Finance and Insurance (F&I) module installed for your Sales department.

- < 6> **User-Defined Fields** - This option on the **System Utilities** menu allows you to tailor the names of certain fields in the Vehicle file to better suit your own operation. When you select this option, an introductory screen explains that of the seven fields with changeable names, three allow searches for records, and two are money fields. After you read the message, press *Enter* to **Continue**, and a **Vehicle Field Names** screen like the following appears:

**Vehicle Field Names
Screen**

```

                                <C> Change  <'> Exit  < >
Vehicle Field Names

                                Type                Name

                                Searchable Fields    UserDef1
                                                UserDef2
                                                UserDef3

                                Non-Search Fields    UserDef4
                                                UserDef5

                                Amount (Money) Fields  Amount1
                                                Amount2
  
```

Searchable Fields - There are three “searchable” fields. You may name these fields, using up to a maximum of eight characters. Each of these fields may contain information up to 16 characters in length.

Non-Search Fields - There are two “nonsearchable” fields, which you may also name with a maximum of eight characters. Each field may contain information up to 16 characters in length.

Amount (Money) Fields - Format for the money amount: \$nnn,nnn.nn (*Example: \$100,000.00*). Enter a name for Field 7 (maximum of eight characters).

< 7> **Add a Price Book** - If you obtain a new manufacturer’s price book on tape from Comptron Data, use this option to install (load) the tape. When you select this option, the following warning is displayed to help you avoid accidentally reading an old backup tape:

CAUTION!! Should you choose this option, the information contained on the tape will be added to your system, replacing the existing information.

<c> Continue <'> Exit < >

When the installation is complete, this question appears:

Update Stock File from Books?
(See the section on the next page.)

< 8> **Master Book** - This lets you create, rebuild, or delete the Master Book, a comprehensive new feature that searches, from the Parts counter **Create Ticket** screen or **Repair Order** screen, ALL vendors’ price books and the entire Stock file for a part number or code, regardless of the vendor number. Selecting this option brings up the following menu:

Master Book

Select

1. Create
2. Rebuild
3. Delete
- ' Exit

Master Book Menu

Explanation of Menu Options:

- < 1> **Create** - This option builds the Master Book, a process which can take four to six hours and requires a lot of hard disk space, so it is best done overnight. Selecting **Option 1** will display a warning message to that effect.)
- < 2> **Rebuild** - This option is for rebuilding your Master Book after any price book update has been performed.
- < 3> **Delete** - This option removes your Master Book from the system.

Update Stock File from Books Prompt

When you load (install) a new manufacturer's price book tape, COMPTRON[®] does not automatically update your Stock file with the new information. It needs for you to tell the program **HOW** you want the update to be done.

After installation of the tape is completed, the screen displays this question: Update Stock File from Books? If you do not wish to update at this time (or if this is not a manufacturer's price book; i.e., it's from an after-market distributor), type **N**. You may choose to update later from the **Management** menu, or (if the price book is from an after-market distributor) update the Stock file from the invoices as they are received (*refer to the Order Receiving section of Chapter 6, Order Processing*). If you update from an after-market distributor's price book, you will have to change labels on display items, or change the prices in the Stock file back to what they were before the update was done. But by just installing the price book, you will still get the latest pricing on anything that has to be specially ordered.

To update now, type **Y**. When prompted for the vendor, type in the vendor of the Stock file to be updated, and a screen similar to the example below will appear:

Update Inventory Screen

Update Inventory From: Honda Motorcycle

Cost and Retail (Y/N)

Retail Only (Keep Cost) (Y/N)

Retail Only (Keep Profit) (Y/N)

Cost Only (Keep Retail) (Y/N)

Cost Only (Keep Profit) (Y/N)

Ignore the Multiples (Y/N)

Update Description (Y/N)

Update Part Status (Y/N)

Print the Changes (Y/N)

Explanation of Update Inventory Screen Options:

Cost and Retail - Updates your Stock file to the new suggested cost, retail, and percent profit from the vendor.

Retail Only (Keep Cost) - If you answer Y, COMPTRON® only updates your retail price to the manufacturer's suggested retail price. This changes only the percent profit.

Retail Only (Keep Profit) - This updates the retail, leaving the percent profit the same, which therefore updates the cost. Only the cost changes.

Cost Only (Keep Retail) - COMPTRON® only updates the cost on this vendor's items. This changes your cost and percent profit, but not the retail.

Cost Only (Keep Profit) - This option updates the cost, leaving your percent profit the same. This changes the cost and retail price, but not your percent profit.

Ignore the Multiples - Answer Y to choose NOT to use the multiples in your Stock file. This will not divide the cost by the multiples to get a per item cost. (If book prices are by the case, answer NO. If book prices are by each item, say YES).



NOTE: The **Multiples** field in the Stock file must match the price book for this to work correctly.

Update Description - Your Stock file is updated with the current description or superseded part number from the vendor, even though you may have typed your own description.

Update Part Status - This will update to the current part status. Some vendors do not have a part status. In that case, this option will not appear.

Print the Changes - This is recommended so that you can see how the change has affected the prices on your inventory. You may want to print new labels for your retail inventory. We recommend the following price change settings for the **Update Inventory** screen:

**Update Inventory
Screen**

Update Inventory From: Honda Motorcycle

Cost and Retail	Y
Retail Only (Keep Cost	N
Retail Only (Keep Profit)	N
Cost Only (Keep Retail)	N
Cost Only (Keep Profit)	N
Ignore the Multiples	N
Update Description	Y
Update Part Status	Y
Print the Changes	Y

By updating your Stock file like this, your hard parts will always be sold at the newest retail price. You should check your printout of the changes to determine whether you have any items which were at special prices or were priced by the case in the price book. You will need to search for these items in the Stock file and change the prices back to where you wanted them. You should also scan the changes report for any parts that have been superseded, and move these to the newest part number. *(See The Stock File section of Chapter 5, Parts/Inventory, for help on finding and moving part numbers already in the Stock file to the most current part number.)*



NOTE: *Updating a price book does NOT affect your inventory value, because it does not change average cost (only retail and replacement).*

Zip Code File 0-A

The Zip Code file lets you maintain a record of the zip code(s) for each city in your customer/service area. COMPTRON® accesses this file from the Customer file, so that when you add a new customer or change information on an existing customer record, you can just type in the zip code and the program will automatically fill in the city, county, and state for you. To maintain your Zip Code file, select **0**, then **A**, from the **Parts Menu**, and you will see the following screen:

Zip Code File Screen

```

                                <N> Next  <S> Search  <A> Add    <'> Exit  < >
Zip Code File                   <P> Prev  <C> Change  <d> Delete
                                < >

                                Zip Code  85602
                                City       BENSON
                                County     COCHISE
                                State      AZ
  
```

Explanation of Screen Command Options:

- < N> **Next** - Goes to the next zip code record on file.
- < S> **Search** - Lets you search by zip code or city.
- < A> **Add** - Lets you add a new zip code record to the file.
- < P> **Prev** - Displays the previous zip code record in the file.
- < C> **Change** - Allows you to change the zip code information for a particular city.
- < d> **Delete** - d (lower-case) deletes this record from your Zip Code file after confirming the deletion.
- < > **Exit** - Returns to the **Maintenance** menu.

There is now a second option for maintaining your Zip Code file, which eliminates the need for you to type in any zip code records yourself: If you wish, you can request an electronic copy of the complete official Zip Code Directory, which Comptron Data purchases from the U.S. Postal Service and converts to a form that can be downloaded into your COMPTRON® system. This directory covers all city, county, state, and zip code information for the continental United States, Alaska, Hawaii, and Puerto Rico.

COMPTRON® will access the Zip Code file from both the Customer file and the Vendor file. This enables your system to complete accurate data automatically to match the county, state, and zip code to the city and street address that you enter, whenever you add a new customer or vendor record or change information on an existing record. The program will always look for the USPS zip code book first, and only if it cannot locate that will it bring up the Zip Code file records that you have previously input yourself.

Periodically, Comptron Data will receive updates to the zip code book, and tapes of these will be made available to you on the same basis as for vendors' price books. That is, you can get updates either by *subscription* (automatically sent to you each time that we get an update from the Postal Service), or on *request* (sent to you only when you decide that your Zip Code file is too outdated, and call or fax an order to Comptron Data for a replacement).

To update your Zip Code file with a new Zip Code Directory, select **0**, then **A**, from the **Parts Menu**, and you will see this menu:

Zip Code Maintenance Menu

Zip Code Maintenance

Select

1. Add/Update ZipCode Book
2. About the ZipCode Book
- ' Exit

Explanation of Menu Options:

- < 1> **Add/Update ZipCode Book** - This option first displays a warning screen to remind you that downloading the tape update to the Zip Code Directory will replace the existing file. If you press *Enter* to **Continue**, then the new tape will be loaded.
- < 2> **About the ZipCode Book** - This option displays a screen describing the Zip Code book and explaining how to order it.

Summary.

In this chapter, you learned how to modify the data bases. The files that may be altered include:

- > Stock
- > Vendor
- > Customer
- > Vehicle
- > History
- > Special Order
- > Category
- > Cost Matrix
- > Hold Ticket
- > System Utilities
- > Zip Code