

Point of Sale/Inventory Control Manual

Release Version 4.20



Point of Sale/Inventory Control Manual, Version 4.20

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WARNING: Incompatible hardware, unauthorized access, or failure to follow instructions in this manual may result in faulty operation of the COMPTRON[®] system. The software and manual are sold "as is." Errors and omissions in this manual or in the software, or in the user's application of the manual or software, are not the responsibility of Comptron Data, Inc.

CHAPTER A

Introduction to COMPTRON

Thank you and congratulations! You have purchased the most powerful microcomputer-based, multi-user, point-of-sale and inventory control software package on the market today.

COMPTRON[®] is a unique computer software package specially designed for retail sales and service. It is tested and proven effective in diverse businesses coast to coast. This chapter of the manual describes how COMPTRON[®] can benefit your store more than any other investment you can make. You will learn how COMPTRON[®] can increase productivity and profits by making everyday business activities—sales, returns, order processing, inventory, and management— easier and faster than ever before. As you read this chapter, keep in mind that COMPTRON[®] is one of the most powerful inventory software packages on the market today.

For information about additional compatible software, contact:

COMPTRON DATA, INC. 6164 South Highway 92 Hereford, AZ. 85635 520-803-0800

Computer supplies (customer tickets, Repair Orders, and parts labels) can be ordered from Comptron Data, Inc.

What Can COMPTRON Do?

The COMPTRON[®] system can be an integral part of every aspect of your business. COMPTRON[®] is made up of a series of data files, called a *data base*. The data base contains almost all pertinent information about your store. By using COMPTRON[®], you can retrieve any information needed in those files. You can add new entries, change existing information, or print a variety of labels, reports, and lists, all in an easy-to-understand format. Historical reports allow you to control inventory accurately. Specifically, by using COMPTRON[®], you can:

- > Keep accurate records of every part in stock, every vendor you buy from, and every customer on account by adding, changing, or deleting information.
- > Record and automatically update files for all point-of-sale activities, including sales, orders, returns, work orders, and estimates.
- > Create purchase orders and receive parts, both for inventory and for customers.
- > Print parts labels and customer mailing labels in many different groupings.
- > Look up an individual part or a general category of parts.
- > Create and print lists for counting inventory and for automatically maintaining inventory counts and tracking.
- Print reports in a variety of useful formats to aid management by calculating profits, predicting sales trends, and monitoring employees' productivity. COMPTRON[®] can be used to track lost sales, reduce slow-moving inventory, and increase cash flow.
- > Accomplish accurate ordering of inventory.
- > Compare profit margins from different vendors.
- > Implement better management procedures.
- > Identify slow-moving merchandise, thus enabling better stocking procedures.

Unlike other inventory software packages, COMPTRON[®] keeps your information (also called data) up to date, and translates the data into reports needed daily. In simple language, COMPTRON[®], dollar for dollar and feature for feature, is unsurpassed.

Other software packages are available to handle sales financing and insurance, new sales tracking, and accounting. For more information, contact Comptron Data, Inc.

But I Don t Know Anything About Computers ...

If you don't know anything about computers, don't worry. COMPTRON[®] is very easy to use. It talks in your language and is designed to do what you want, when you want to do it.

Its simplicity is derived from COMPTRON's *menu-driven system*. That is, COMPTRON[®] is made up of menus where you select what you want to do. These menus branch to other menus or questions to which you may respond. Using COMPTRON[®] is simply a matter of following very basic instructions that appear on your screen.

Don't be afraid of using the computer. Treat it as a piece of fine office equipment, and follow the simple instructions in this manual.

How to Use This Manual

This manual is a very important tool in acquainting you with COMPTRON[®]. Each chapter presents step-by-step instructions on how to do whatever task you want. Helpful diagrams and examples are included. At the beginning of each chapter, you will find an introduction section that describes the information the chapter covers, and how the information is presented. At the end of each chapter is a summary that can be used for quick reference. These introduction and summary sections serve as a kind of *road map* to show you exactly where you are going. The chapters of this manual break down like this:

- > Chapters A-C: Basic information about COMPTRON[®], providing the background you need to know about the features and operation of COMPTRON[®], as well as installation of your equipment and computer software.
- > Chapters 1-10: Each of these chapters corresponds to one option on the **Parts Menu**.
- > Chapter 11: This chapter covers **Option 3**, **Management**, on the main **Comptron Menu**.

This manual employs the following print conventions to aid you in recognizing terms and phrases that you will see:

- > This is the Times Roman font, used for regular text.
- > This is the *Times Roman Italic* font, used to introduce/emphasize special terms, to display important text notes/warnings and chapter references, and to represent the names of certain keys that you will use on your computer keyboard.
- > This is the Times Roman Bold font, used to identify titles of COMPTRON[®] program menus, screens, and fields; menu options and command options that you can select; as well as major COMPTRON[®] system functions/processes.
- > This is the Courier font, used to represent messages displayed on your computer screen, and text that you need to type (key in) from your keyboard (which will also appear on your screen).

When you see a number or a series of numbers separated by hyphens after headings (example: 6-1-2), these indicate the "path" of menu options for you to select from the **Parts Menu** to go directly to that function in COMPTRON[®]. (*There is also a comprehensive cross-reference list of paths at the end of this manual in the Menu Path Index.*) Often you may see questions on the screen after you select a menu option. Answer the questions, and you can proceed to select the next menu option number.

If you are typing your store's records into the computer for the first time, read Chapters A through C in order. You will refer to the remaining chapters as appropriate. If your store is already using COMPTRON[®], you have a password and security level according to the type of work you do with COMPTRON[®].

Data Files

As you move much of the information about your business into the computer, you may wonder how it is stored. The computer stores its data in *files* similar to the way you've been storing it manually. When we refer to the different locations where information is stored, we may use terms unfamiliar to you.

All the information put into the computer makes up the *data base*. Within the data base, *files* group similar information together. A Stock file, for instance, may contain information about the parts you stock, while a Customer file contains information about your customers. All the information about one part or one customer is a *record*. A *field* is the individual information about that customer or part that makes up the record (like a customer's address or credit limit, or a part number or quantity). You type the fields for each record to create your files.

Using the Keyboard

Refer to the keys on your keyboard as you read these keyboard instructions. You should be familiar with the following keys:



If you make an error while typing, press *Backspace* to move the cursor back over the incorrect character.



(*Return* on some keyboards) The *Enter* key is usually used to tell the computer that your entries on a COMPTRON[®] screen are complete, or to skip a field that you wish to leave blank.

When using COMPTRON[®], the information you enter must be in capital letters, unless stated differently. Press *Caps Lock* to type capital letters.

If you want to use the keypad numbers to the right of the keyboard, press the *Num Lock* key and the light above it will turn on. If the light is off, the numbers on the keypad will not work.

Ctrl

The *Ctrl* (control) key is used only in special cases. For example, COMPTRON[®] uses the **Ctrl-d** command, which means to hold the *Ctrl* key down while pressing d.

Reset (if present) is a button on the front of most computers. This button should **NEVER** be pressed while the computer is on.

Using the Screens

COMPTRON[®] has two types of screens: menu screens and file screens. Menu screens allow you to make a selection from a numbered list of choices. Here is the **Parts Menu**, from which you can select what you want to do by typing the number corresponding to your choice (1-0). The **Parts Menu** may display only some selections, based on your password access level.

```
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
```

Parts Menu

The file screen displays the contents of a data file, one record at a time. It has a horizontal menu of single-character command options, commonly known as a menu bar, arranged across the top of the screen as in the example below. You will use menu bars often in COMPTRON[®]. They allow you to select different options for a particular record.

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

Commonly Used Command Options

The six commands in the menu bar example above appear on many screens in $\text{COMPTRON}^{\textcircled{B}}$.

Explanation of Basic Screen Command Options:

- < N> Next Allows you to advance to the next record in sequence.
- < S> Search Lets you locate any record in a file by searching through a specified field in all the records for a particular entry.
- < A> Add Lets you create a new record and add it to this file.
- < '> Exit Leaves this screen.
- < P> Prev Allows you to go back to the previous record in sequence.
- < C> Change Lets you modify information in an existing record. After you type C, the cursor will go to the field(s) that you may change.

- < d> Delete Allows you to delete the record on your screen. COMPTRON[®] will delete all the fields related to that record from this file.
- < L> Label Lets you print a label with this information.



WARNING: Use the lower-case d (Delete) command with extreme caution. Deleting a record erases all current information immediately. Information deleted cannot be retrieved!

There are other letter commands in COMPTRON[®]. They are explained briefly on the screens to which they apply, and in more depth later in this manual.

Most of the COMPTRON[®] menus and menu bars operate through single "hot key" commands, which take effect as soon as you type the number or letter key for your choice, without your having to press the *Enter* key to execute the option. The primary exceptions would be those menus listing more than nine options, such as the **Other Order Options** menu (see Chapter 6, Order Receiving) or the **Stock Reports** menu (see Chapter 9, System Reports). "Hot keys" are also used for command line options, but not for data fields within a screen.

Data Entry Field Commands

As you are entering data in fields on the various screens, you will see a horizontal menu bar at the top of some screens. These are the field command options available to you, in addition to the valid data for a particular field.

<'> Prev <.> Erase <;> Skip

Explanation of Data Entry Field Command Options:

- < '> Prev The apostrophe key < '>, located immediately to the left of the *Enter* or *Return* key on most terminal keyboards, allows movement of the cursor to the previous field. If this is the first field, < '> Exit takes the place of < '> Prev.
- <.> Erase The period key < .> allows you to erase data on a particular field. This option is not allowed on fields which contain mandatory (required) entries.
- < ;> Skip The semicolon key < ;> , which is immediately to the left of the apostrophe key on most terminal keyboards, is the character used to skip certain groups of data so that you don't have to press *Enter* on each field to advance the cursor through the screen.

The Scrolling Search Command

In addition to the basic field command options discussed above for data entry screens, there is a new, more general kind of search command, the forward slash < > Search option, that can be used to speed input of parts information in certain fields on tickets created in Parts Counter Operations and on the **Repair Order Parts** screen. This differs from the < S> command, which finds for you a record showing a particular string of characters in a field.

Instead, the < /> command, when entered in the Vendor, Code, Part Number, or Category field, brings up a window containing a list of all the possible vendors, parts, etc. in the data base. The list is displayed according to the sequence and range selected, and you can move through it to pick the line number representing the code or part that you need. When you enter the line number, the window disappears, and COMPTRON[®] displays the information you picked in your Parts ticket or Repair Order. This command is explained briefly on the screens at the fields where it applies, and later in this manual.

Screen Verification Commands

After you have completed entering data for a particular screen, another horizontal menu will appear across the bottom of your screen, similar to the following example, which allows you to verify the data you have entered:

< > Accept <'> Correct <U> Undo

Explanation of Screen Verification Command Options:

- < > Accept Press *Enter* to accept all the data as entered. The record will then be updated in the file.
- < **'>** Correct This allows you to correct or supply missing information for one or more fields on the screen prior to updating the record.
- < U> Undo This will undo (disregard) all the field changes you may have made, and redisplay the record as it was prior to entering any data.

Check your data to make sure it is correct. Type ' and press *Enter* to edit the data, or press *Enter* to **Continue**. If you are printing a report, once you press *Enter* to continue, your report will be printed. You may stop the report from printing by going to the \$ and typing cancel printer and then pressing *Enter*.

Screen Messages

When you have completed modification of the data on the screen, but some of the required information is not present, this message will appear at the bottom of the screen:

```
*** Incomplete Record *** <'>Correct <U> Undo
```

When you have entered the $\langle S \rangle$ Search command, but there is no matching search "key" (string of characters) in the file, the following message is displayed. Press *Enter* or *Return* to continue.

```
*** Record Not Found ***
```

Many of the fields will display a "Help" message at the bottom of the screen to assist inexperienced users. This is a plain-language explanation of the type of information or data format needed to complete the field correctly.

Example: Engine Serial Number — Format: Maximum of Twenty Alpha/Numeric Characters

At times, you may see one of these messages:

```
Invalid Entry
Duplicate Record
```

Check to make sure you have not mistyped something, or that you are not trying to enter data that is unacceptable. Then type the data again.

The following messages mean that the computer is using a significant portion of its memory to work on the process at hand, and it may be a moment before normal functioning resumes:

```
Loading
Working
Printing
```

Trouble-Shooting

Although COMPTRON[®] is proven through thousands of hours of use in many stores, you may have a special problem unique to your situation.

Whenever the computer does not work, go through the following process:

- > Read the computer screen carefully. Make sure you have entered all information correctly and have used appropriate commands.
- > Read the section of the manual about the operation you are performing.
- > Check all cables, electrical hookups, and so on to make sure the hardware is operational.
- > If your problem persists, contact Comptron Data, Inc.

DO NOT TYPE RANDOMLY ON YOUR KEYBOARD, OR TURN YOUR COMPUTER ON AND OFF. Either action will only compound your problem.

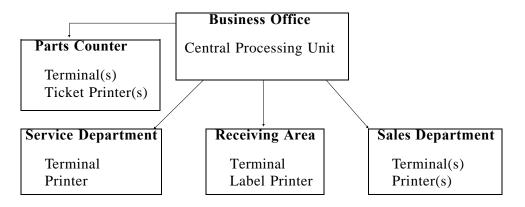
Your computer hardware (video display screens, disk drives, etc.) is warranted separately from the software. If you need special assistance with the software, or if you suddenly receive an **ERROR** message while working, write down the error message and call the Technical Support line, (520) 803-0800. COMPTRON[®] experts are available at this number to help, should you have trouble.

YOUR BEST INSURANCE AGAINST TROUBLE IS TO BACK UP YOUR DATA DAILY. (See page B-5 for more information on how to back up your data.)

For help on stopping a "runaway" printer, see the first section of the appendix to this manual.

COMPTRON in Your Store

This diagram illustrates how COMPTRON[®] is placed in a typical store. You may want to modify this setup to best fit the needs of your store.



* Optional electronic cash drawers are available from Comptron Data, Inc.

We recommend that your business office contain your *central processing unit* (*CPU*) and main printer. The number of terminals and ticket printers on the Parts counter is up to you. We suggest that you consider having one extra ticket printer that can be loaded with white paper for printing estimates, leaving the other printer(s) dedicated to printing regular counter tickets. You can then choose which printer to use each time, or set one as the default printer with the other as an option. This saves you money on printer supplies (white paper being much cheaper than multi-part ticket forms), and provides a spare printer as backup in case one of the others goes down and needs repairs.

The Receiving/Shipping area is where parts are received and entered into COMPTRON[®] to update the Stock file and inventory file. Labels for part identification may be printed here. Enter the parts information into COMPTRON[®] and print labels **BEFORE** placing the parts on the shelf for sale. If you do not have a separate receiving area, you may use a Parts counter terminal to print labels. Switching labels and tickets in the printer can be cumbersome, so we recommend separate printer locations.

Your Sales department may find a terminal and printer useful for printing customer mailing labels for sales promotions. Also, the sales department may use other software applications compatible with COMPTRON[®], currently available from Comptron Data, Inc.

Preparing to Install COMPTRON

There are several important tasks that you will need to perform to prepare for the installation of your COMPTRON[®] system and the training for you and your staff. By completing these tasks before Comptron Data's system installer arrives, you will enable us to spend more time on the actual installation and training.

If you have any questions regarding these instructions, please call Comptron Data, Inc., prior to your system installer's arrival. Having all of this done ahead of time will make better use of the installation and training time.

String Terminal Cable

The electrical cable you will need to connect your terminals has been shipped to you in advance so that you can have the stringing completed prior to our arrival. The cable should be installed by someone with some experience in stringing cable, following these guidelines:

- Start all cable from the "main unit" area in your business office, leaving a minimum of 5 feet excess cable at the main computer location.
- > Route one separate cable to each "satellite" (link) terminal and one to each printer. This may require you to go up and over, or around and through, walls and counters to get to the desired location. Leave an extra 5 feet of cable at the terminal end as well.
- > Terminal cable must be routed 24 inches away from any high-voltage cable. If it crosses a floor traffic area, a rubber threshold is required.
- > Fasten cable with nylon or plastic zip strips. If staples are required, do not staple over the wire. Instead, hammer the staple in and zip strip the cable to it.
- > Do not pull the cable too hard. It will break inside if stretched or crimped.
- > If routing several cables together, twist them together somewhat instead of running them parallel.

Prepare Your Store s Work Areas for Each Satellite Terminal and Printer

Look over the desired location that you have identified for each satellite (link) terminal and printer (e.g., Parts counter, Receiving/Shipping area, Service department), and move any items that will be in the way. Keep the following points in mind as you prepare the area for installation:

> Terminals generally sit on the Parts counter near the microfiche reader.

- > You will need a 12-volt outlet within 10 feet of each device.
- > As a minimum, a terminal needs a space at least 26 inches deep by 20 inches wide.
- > A printer needs a space at least 18 inches wide by 14 inches deep if the paper supply is fed from below, or 25 inches deep if the paper stack sits behind the printer.

Prepare Your Business Office for the Main Computer and Printer

The main computer *(central processing unit or CPU)* is the brain of your entire store's system—the satellite (link) terminals are mere "dumb" access points for communicating with the main computer. Therefore, the main computer should be located away from high-traffic areas or horseplay, preferably in your business office. Serious damage can be done by bumping, hitting, or otherwise jostling the main computer unit.

- > Install the main unit on a very sturdy desk or table, or on the floor if the area is protected from activity.
- > It is preferable to have your main printer(s) on a separate desk within 3 feet of the main computer to avoid vibration.
- > The main computer will be plugged into the battery backup system and the printer(s) into a 120-volt outlet within 6 feet.
- > Static from carpet can be harmful to your computer. If static is a problem in the area of your computer, use anti-static spray on carpeted areas.

Prepare for the Battery Backup Power Supply

This power supply unit sits under the monitor or beside the main computer, and will help safeguard your operation from loss of data in the event of a power failure or other interruption in your normal supply of electricity.

- > This unit **MUST** be plugged into a dedicated (separate circuit breaker) 120-volt outlet.
- > Down time can be avoided by having "clean" power to this unit.

Prepare for COMPTRON Training

Price Books – We need to know which vendors' *Price Books* you want to have loaded onto your system, as well as those for which you want to receive periodic updates as they become available. A list of available price books was sent to you in advance to allow you to make your selections, and another copy is included at the end of this chapter.

Please mark an X for the price books that you wish to have installed when your store is initially converted to using COMPTRON[®], and use an S to indicate those for which you want future updates. COMPTRON[®] needs this document completed, signed, and faxed back as soon as possible, so if you haven't sent it in already, please fax the price book list to this number: 1-520-803-1440.

- **Vendor List** A list of all your vendors (suppliers) will be necessary to input purchase order information, cost information, etc. into $COMPTRON^{\textcircled{R}}$. A Vendor List (*Form C*) was mailed to you in advance so you could itemize all the vendors with whom you do business, and another copy is included at the end of this chapter. Please have this list ready when $COMPTRON^{\textcircled{R}}$ training begins.
- **Categories** The **Category** field in your COMPTRON[®] data base records allows you to group inventory items together in ways useful to your store's operation. By being able to list or view like items together, you can see the stock status for a group of related items all at once, even when they have different vendors. You can quickly locate a part or print physical inventory worksheets for each category. You can create up to 99 categories, but each item can belong to only one category.

It is very important to set up your categories ahead of time, so that when you add inventory to your Stock file you can type in each item's category at the same time. A sample Category List (*Form D*) was sent to you previously so you could review it and determine whether you want to use them as they are or modify them to better fit your business (another copy is included at the end of this chapter). A completed Category List should be ready when your COMPTRON[®] installer arrives. You should write these new category numbers on the accessory items so they will be identified when you prepare your written list.

Part Numbers in Use – To keep an accurate, up-to-date record of your inventory, your new computer system must know the part numbers and vendor numbers of all existing parts in your store. You will prepare to input this information by making a complete handwritten list of all parts and accessories in your store's inventory. We have mailed you separate preliminary inventory preparation documents for "Hard Parts" (Form A) and "Accessories" (Form B), and included copies at the end of this chapter. You can make photocopies of these originals by either using your in-house copier or sending them to a quick-print store. Estimate the number of pages you might need to accomplish the task.

For hard parts, we need only the part numbers (not quantities yet) for those items that you currently have in stock. For accessories, we need more information: For those accessory vendors for which we will install price books, we need the part number, code number (optional), and category number. For accessory vendors that have no price book installed, we need the part number, code number (optional), category, description, cost, and retail price. You can help by starting these pre-inventory tasks before the COMPTRON[®] system installer arrives.

You should set up rules for your staff as to where to start your part counts, what direction to go, and how to mark the bins/shelves to show what you have completed. Keep all of the documents in order. This will ease the input of data into your COMPTRON[®] system later on. This task can take from 3 to 10 days, depending on how much manpower you allocate to it. Remember that accurate input of the part numbers, and eventually the quantities, depends on completion of this task, so the sooner it's done, the sooner you can be up and running with your new system.

What Happens After Your COMPTRON System Is Installed

- **Input of Part Numbers** When the physical installation of the COMPTRON[®] system is completed, your written part number lists (*Forms A* and *B*) will be used to input your inventory part numbers into the computer. The COMPTRON[®] installer will instruct you on how to enter the data into the system using *Forms A* and *B*. (See Chapter C, Installing Your Data, for more information on how to set up the files and default values that you will need in COMPTRON[®], and how to input your data into them.)
- Physical Inventory Count and Input All parts or bins, accessories, tires, batteries, etc., must be labeled with at least a vendor number (or some other unique identification) plus the part number. After the computer input of your part numbers is completed, you can print labels for any items that do not have this minimum information; the labels can be attached to the appropriate accessory/part bin/box. At this point we will be ready to perform a physical count of the inventory using computer-generated inventory worksheets. Over a weekend (when your store is closed) the counts will be taken using the worksheets. The counts must be accurate and entered into the system IMMEDIATELY.



NOTE: If manpower is in short supply, we have found that using temp services or hiring keyboard-knowledgeable high school or college students for a few days can be very helpful for completing manual physical inventory listings and inputting those numbers into your computer.

Protecting Your Data

The most effective way to keep your data secure is to regularly make copies of your store's data base on a magnetic tape cartridge. Creating such copies is called *backing up* your data. A good rule to follow is to make *backups* daily. (For instructions on how to back up data, refer to Chapter 10, System Maintenance, and read the System Utilities section.)

Your store's data base is held magnetically inside the computer on a *hard disk*. To prevent losing data, observe these don'ts:

- > **DON T** interrupt the electrical power, unless you have properly shut down COMPTRON[®] first.
- > **DON T** expose the computer, diskettes, or tape cartridge to extreme temperatures.
- > DON T place magnets or equipment with electromagnetic motors on or near the computer or components. This includes typewriters, fans, radio speakers, etc.

To protect your data, follow these do's:

- > **DO** provide a dedicated circuit for the CPU and a clean circuit for the CPU, link terminals, and printers.
- > **DO** enter accurate data.
- > **DO** store your diskettes or tape cartridges in a separate location from COMPTRON[®].
- > DO have at least three *backup tapes* and rotate their use daily. (Some dealers choose to have seven tapes, one for each day of the week.)

To protect your hardware (computers, terminals, printers, etc.):

- MAKE SURE YOUR COMPUTER IS ON ITS OWN ELECTRICAL CIRCUIT. Other equipment on the same circuit, such as welders or air compressors, can damage the computer.
- > INSTALL POWER PROTECTORS such as a *battery backup*, surge protectors, data line protectors, etc. (Ask Comptron Data for information.)

Summary

This chapter covered:

- > The capabilities of $COMPTRON^{\textcircled{R}}$
- > How to use this manual
- > The components of your computer
- > Organization of the data base
- > How to use the keyboard
- > How to use the screens
- > Screen messages
- > Trouble-shooting
- > Preparing to set up COMPTRON[®] in your store
- > How to protect your data
- > How to protect your equipment

Forms to Prepare for COMPTRON Installation

The form samples illustrated on the following pages have been supplied to aid the new COMPTRON[®] owner in preparing to have this system installed for the first time. They include a list for ordering vendors' price books that are available in electronic form to use on your COMPTRON[®] system; as well as the part number, vendor, and category lists (forms A through D) for manual recording of inventory data that will later be input into the computer after the COMPTRON[®] software is installed. These forms are discussed in the Preparing to Install COMPTRON[®] section of this chapter.