

CHAPTER C

Installing Your Data

As you have probably learned by now, the essence of COMPTRON[®] is to give you information about your store in many useful formats. In order for COMPTRON[®] to be effective, it must begin with accurate information in the data base. This chapter tells how to make sure COMPTRON[®] has only accurate information by installing your data with care. Installing data means entering (typing in) information about every aspect of your business that COMPTRON[®] needs to know—information about parts, vendors, customers, and categories. All the information typed into COMPTRON[®] makes up the data base.

By following the easy, step-by-step instructions in this chapter, you ensure that COMPTRON[®] will be up and running in no time. And you can rely completely on COMPTRON's accuracy.

Installation

Before you begin using COMPTRON[®] for your store's daily activities, data must initially be entered (typed) into the computer. This data entry (installation) process is considered *creating a data base*. A data base includes everything needed by COMPTRON[®] to do transactions, calculate quantities, and print labels or reports. Enter data by typing the required information at a keyboard. The people who perform this data entry should be careful to type the information completely and accurately. COMPTRON[®] can be truly effective and useful only with an accurate data base.

Follow the steps in Chapter B to start and shut down COMPTRON[®], and to make backup copies of your data. You may use the CPU and all auxiliary (link) terminals at the same time to enter this information into your data base.



***NOTE:** As you begin this installation process, remember that eventually the personnel in your store must know how to use COMPTRON[®]. Therefore, it is a good idea to start making plans at this point for a COMPTRON[®] training program. Because COMPTRON[®] is so easy to understand and use, training probably will not take much time.*

To install your data, complete the following steps:

Set Up Your Operator File

Just as with important papers in your safe, you will want to protect your store's electronic data from unauthorized access. COMPTRON[®] helps you to do this by providing a system of security access levels and passwords that you can employ to control how much of your data base each employee can see and use.

Therefore, one of the first and most important things you should do, as your store's owner/manager, is to designate the level of access for each member of your staff who will use COMPTRON[®], and assign each person a unique operator number and password. This is done through the Operator file.

Refer to Chapter 11, Management, and read the Operator File Option section for guidance on setting up your Operator file and assigning identifying numbers, passwords, and appropriate levels of COMPTRON[®] access for yourself and your employees.

Set Up Your System Defaults

COMPTRON[®] assigns automatic default values to certain functional areas for use in its computations on parts and service tickets, purchase orders, and reports. These defaults include the sales tax rate to charge for parts and labor, which, of course, need to be set to the percentage appropriate for your state and local jurisdiction. But COMPTRON[®] also lets a store owner/manager modify the default percentage of retail price to require as a deposit on specially ordered parts, the hourly labor rates to charge for repairs/service, and the minimum level of security access required to perform various Parts and Service department functions in COMPTRON[®].

In addition, there are default settings to determine which of your printers will be used for various types of printing tasks (e.g., tickets, parts labels, purchase orders, and reports), and which of the many report types COMPTRON® will print routinely at the end of every business day. You can even change defaults to assign special numbers (other than the next one in normal sequence) to tickets, purchase orders, and physical inventory worksheets.

Refer to Chapter 11, Management, and read the Change Defaults Option section to learn how to customize your system, parts, service, printer, and end-of-day defaults to fit your business.

Build the Vendor File

The Vendor file includes the data for each vendor (supplier) with which you do business. Make a list of all the vendors who supply stock to your store, using Form C that was sent to you in advance so you could organize your store information before the COMPTRON® installer arrived (*covered in Chapter A, Introduction to COMPTRON®, under the Preparing to Install COMPTRON® section*). Include for each the company name, address, telephone and fax numbers, and the dealer number that the vendor has given you to use for ordering. Refer to Chapter 10, System Maintenance, and read the Vendor File section to add this information to COMPTRON®.

Print the Vendor List

Before printing a reference list of your assigned vendor numbers, refer to Chapter 9, System Reports, and read the Vendor List section. After printing the vendor list, place a copy by each link terminal throughout the store to serve as a hard-copy reference for operators.

Build the Category File

Entering stock category information allows you to group similar parts and accessories together in ways useful to your store's operation. Being able to view like items together saves you time and money by letting you see your stock status for a group all at once, regardless of which vendors supply the items, and locate a part in question quickly. Categorizing your stock enables you to print physical inventory worksheets by logical groupings, and it also helps you keep on top of your ordering needs and check part movement history to see what is selling well or poorly.

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 its category at the same time. Go to Chapter 10, System Maintenance, and read the Category File section, which includes a sample list of suggested categories to help you create the appropriate categories for your store; this is the same as on the Form D list that you used to decide what category codes you would need, when you organized your store information to get ready for the arrival of your COMPTRON® installer (*see the Preparing to Install COMPTRON® section of Chapter A, Introduction to COMPTRON®*). Using your Form D Category List, enter the category codes you've chosen for your store into COMPTRON®.

Print the Category List

After entering the categories, print a list for reference. Go to Chapter 9, System Reports, and read the Category List section. Print the category list and return to this paragraph. After printing the list, place a copy by each link terminal throughout your store to serve as a hard-copy reference for operators.

Build the Customer/Account File

The Customer/Account file contains information about your open accounts for customers and employees, such as addresses, telephone numbers, credit status, etc. This file should also include internal accounts for your various store departments, to track movement of inventory from one department to another. Refer to Chapter 10, System Maintenance, and read the Customer File section. Secure your account information and add it to COMPTRON®.

Print the Account List

To print a list of your accounts, refer to Chapter 9, System Reports, and read the Customer Lists section. Print the list of accounts, and place a copy of this list by each link terminal.

Build the Stock File

Until your Stock file is entered and you begin daily and monthly processing, your store's History file will not be up to date. Refer to Chapter 10, System Maintenance, and read the Stock File section. Then get out the written part number lists (Forms A and B) that you completed when organizing your store information to prepare for your COMPTRON® installer's arrival. (*Refer to the Preparing to Install COMPTRON® section of Chapter A, with particular attention to the portion on organizing your store information.*)

The COMPTRON® installer will advise you on how to input your inventory part numbers into the computer system using Forms A and B. Add a record to your Stock file for each item that you stock, with the required data in each field (e.g., vendor number, category, part number, stock level, cost, and markup). A good rule of thumb for figuring stocking levels is to use whatever quantity is on hand, and set the reorder point at half that amount. As you enter parts, make note of any superseded numbers and move the part to the newest number.



NOTE: *Comptron Data has developed a special program for adding inventory faster. This is accessed by selecting **Option 5**, then **2**, from the **Parts Menu**. (Refer to Chapter 5, Parts/Inventory.)*

Update the Physical Inventory

Since some time may have passed during your initial entry of all the Stock file data, you will need to check your physical inventory counts before relying on COMPTRON[®] for daily processing. All parts or boxes/bins, accessories, tires, batteries, etc., must be labeled with a vendor number (or other unique identifier) and the part number. After you finish the computer input of your part numbers, you can print labels for any items that do not have this minimum information, and attach them to the appropriate part, bin, or box.

Read Chapter 8, Physical Inventory, and use COMPTRON[®] to generate inventory worksheets. When your store is closed (such as over a weekend), use copies of these worksheets to conduct a complete physical count of your current inventory. Write in any part numbers missed when you first made your part number lists. Have someone **OTHER THAN** the person with the list call out the part numbers and quantities for each item or box, to make sure that all parts are counted.

The counts must be accurate, and you should enter them into the computer **IMMEDIATELY**. Then you can begin using COMPTRON[®] for daily operations.



NOTE: It is **EXTREMELY IMPORTANT** that you begin using COMPTRON[®] immediately after updating your physical inventory. If you delay, your inventory totals will not be up to date. (Local temporary services may help greatly in completing your inventory update promptly.)

Using COMPTRON in Your Store

After completing the update from your physical inventory, you are ready to use COMPTRON[®] for your store's everyday activities. Specifically, the operation of COMPTRON[®] can now be broken down into two categories:

Daily Use

Each day you will perform Parts counter operations, place purchase orders, receive merchandise to add to your inventory, and carry out other related activities. You also need to run **End of Day** processing at the close of each business day. (*See Chapter 7, End of Day/Month Processing*, for an explanation of this procedure.)

Monthly Processing

At the end of each month, run **End of Month** processing. (*Refer to Chapter 7, End of Day/Month Processing.*) COMPTRON[®] prints an End of Month report as a part of this process. With this you can review your store's performance.

Summary

In this chapter you learned:

- > What steps need to be taken to install data for first-time use of COMPTRON®
- > How to use COMPTRON® daily
- > How to use COMPTRON® for special activities at the end of each month to help you improve your store's performance