Pos-I-Lube User’s Guide

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CHAPTER 1 : Store Setup

Store Information Setup

Store Information needs to be setup correctly before you first start using the system to cash out customers. If you have just received a new system from Auto Data, everything except Sales Tax should already be filled in for you. However, it is a good idea to check this information and make sure it is configured to your needs.

Navigating Store Information Setup

1. Click on Home Tab
2. Click on Miscellaneous
3. Click on Store Setup
4. Click on Software Setup
5. Click on Store Information
6. Enter pin.

You will now see this screen:

To edit any field on this page:

1. Click on the radio button next to the line you want to change.
2. Proceed to type in the correct value and press <Enter>.

NOTE: All of the data in Store Information Setup may be changed before you open for the day or after you close. If you try to change some of these fields while you are open, you may get this message: “Cannot Change. A Z-Report must be printed first”.

Store Information Details

Fleet Lookup- If you are working in the Point-of-Sale program and do not have Fleet Lookup turned on, you will not be able to browse through your fleet list to select a fleet customer.

Minimum Price- All receipts that have a total below the Minimum Price will not be counted as a vehicle in your sales reports. The Minimum Price setting determines which tickets are counted in your daily total car count. You will want to set this amount slightly below the cost of your most inexpensive service (not part!). This allows you to keep track of how many cars you took in throughout the day for any service above your
Minimum Price. For instance, you would want to have all of your oil change services priced above the Minimum Price so that they will be counted as a car. This feature is useful for cases where a customer does not buy a major service, such as if a customer just buys a wiper blade or a bottle of oil.

**Full Service Surcharge** - It is possible to add an automatic taxable surcharge to all of your full services with the Full Service Surcharge feature. You can use this feature for a shop fee or any other taxed surcharge. The description and amount will print out on the receipt.

**Store Number** - If you only have one store, this number will usually be 0001. If you are part of a chain, this number will be assigned to you by your back office. You will probably never need to edit this field.

**Store Name, Address and Telephone** - These fields will appear on your receipts.

**Sales Tax** - Example: 7% Tax should be entered as 7000.

**State I.D.** - This field will also print out on your customers' receipt. They are not required in Pos-i-Lube, but might be required by state laws.

**CarFax I.D.** – Optional feature – If enrolled, customer data will be sent to Carfax, Inc for inclusion on their vehicle history reports. The service center that performs the service is listed along with date, mileage and what was performed.

**Inventory Reorder Settings**

Inventory Reorder Settings are used in conjunction with the Automatic Parts Reordering feature of Pos-i-Lube. This feature tracks your usage habits and ultimately will be able to predict how many parts or lubricants should be ordered at any given time. Before using this feature, you will need to enter your own values in the Inventory Reorder Settings page. To change these settings, navigate to the Store Information Setup screen.

<table>
<thead>
<tr>
<th>Inventory Reorder Settings</th>
</tr>
</thead>
<tbody>
<tr>
<td>○ Days Lead Time 4</td>
</tr>
<tr>
<td>○ Days Between Shipments 14</td>
</tr>
<tr>
<td>○ Days Safety 7</td>
</tr>
</tbody>
</table>

- **Lead Time** is the number of business days from the time an order is placed until the order is delivered.
- **Days Between Shipments** is the number of business days from the arrival of one order until the arrival of the next order.
- **Days Safety** is the number of business days you will be able to operate in the event a shipment is late for delivery.

For more information on how to use Automatic Parts Reordering, see the Inventory section of this manual.
CHAPTER 2: Inventory Setup

Services
Each of the Services in the inventory are grouped into categories called product codes. These codes organize your services based on the types of service it is. For example, all of your oil change services are grouped together because they all use the same parts: oil filters. You can have as many services as you like in each of these product codes.

Product Codes
Here is a list of product codes and the type of services that should go into each. All categories marked as User Defined can have any type of service that you want. All others need to follow this guide to ensure the data in your Stats menu is accurate.

1. Full Services
2. Air Filter Services
3. Transmission Services (For use with Kits only, no T-Tech services)
4. Breather Services
5. PCV Valve Services
6. Wiper Blade Service
7-8. User Defined
9. Flush and Fill Service
10. Front Differential Service
11. Rear Differential Service
13. Transfer Case Service
14. User Defined
15. Lube Only Service
16-17. User Defined
18. Car Wash
19. Air Conditioner Services
20 --> 54. User Defined
55-57. Miscellaneous Sales (taxable)
58-59. Miscellaneous Sales (non-taxable)
60. Miscellaneous Coupon (non-taxable)

Note: Product codes 55-59 are miscellaneous sales. This means that when you select these services in the Point-of-Sale, you will be able to type in your own service description and your own price. Product code 60 is a miscellaneous coupon, and the only product code that will allow a negative amount in the Point-of-Sale. If you select miscellaneous coupon from the Point-of-Sale, you will be able to type in your own description for your coupon and also a negative number, which will then be subtracted from the ticket total.
To Add a Service

Go to the Inventory tab, click on Management

Enter your password and then click on Inventory Setup
Select Services from the Inventory Setup screen.

From the list of services, select the product code that you would like to add a service to.
Once you are in your selected product code, click the **Add** button at the bottom of the screen. This will create an empty service where you can type the name of the service, as it will appear in the Point-of-Sale.

![Inventory Setup for SERVICES](image)

**Description**

Once you have typed the name of the new service, press <Enter>. Type the *Description* of the service, which will appear on the customers’ receipt. Press <Enter>.

![Inventory Setup for SERVICES](image)
Next, click on the *Change* button. Circular radio buttons will appear next to all the attributes of this service that you can edit.

If this service has a retail price vs priced by parts, click on the radio button next to retail price and enter the price and then press <Enter>. 
Click on the radio button next to *Taxable Amount* and enter how much of the retail price you want to be taxed and press <Enter>.

Proceed to *Set Up features* and set to either Y for Yes or N for No.

### Set Up Features

**Price Service By Parts:** This feature allows you to base the price of a service on the price of the part that you sell with that service. For example, you would price your air filter service by parts. You would set your retail price for your air filter service to $0 and then you would have a price on each of your air filters. The price the customer will pay will depend solely on the air filter that was chosen. This feature requires that *Call Up Parts* be set to Y to work.

**Call Up Parts:** This feature allows you to call up a list of the parts in this product codes' parts list. For example, in your full service, you want Call Up Parts set to Yes so a list of your oil filters will pop up on the screen whenever you sell a full service. If this feature is enabled, you can accurately track your parts usage, and also be able to price the service by parts.
**Call Up Quantity of Parts:** This feature will call up a list after you select a part, which will allow you to tell Point-of-Sale how many of the selected part you used on the service.

**Call Up Lubricants:** This feature will allow you to call up a list of the items in your Lubricants inventory (A list of all of your oils).

**Lubricants to Call UP:** This feature allows you to select which oils you want to call up for each service.

To set up a custom oil list, click on *Lubricants to Call UP* button.

Click on each oil in the first column to select it. Once you are done selecting your oils, click *Copy*.

If you’d like to change the order of your final list or delete any oils from it, use the *Modify List* toolbar on right side of screen. When finished creating your custom oil list, click *Go Back* to return to your service options.

Once you are done programming the *Set Up Features*, you have successfully added a service and it will appear in your Point-of-Sale under the Services menu.
If the service you have just added requires parts, proceed to the Parts section of the manual to learn how to add the parts for your services.

**Sales History**
Will show you how many of this particular service have been sold for day, month, year and in total.

**Service Interval**
*Miles* – The customer’s receipt and static sticker will indicate they should return in this many miles.
*Months* - The customer’s receipt and static sticker will indicate they should return in this many months.

**PM Category**
If the Preventative Maintenance Schedule feature is installed, the user simply needs to select the service they want to appear on the schedule by clicking the arrow in the drop down list and choosing appropriate service. Only one service per product code can be assigned to the PM Schedule.

**To Edit a Service**
To edit a service (i.e. change the price of a service), first navigate to the service you would like to edit. Second, click *Change* button. Third, click radio button next to the line you want to edit, type what you want to edit and press Enter. Click *Go Back* to exit the *Services* screen.

**To Delete a Service**
To delete a service, just select the service you would like to delete by clicking on it and then click the *Delete* button on the bottom of the screen. Click *Yes* when asked if you really want to delete the service.

**Parts**
All parts are categorized in your inventory based on the 'type' of part. For instance, all of your oil filters are grouped together and all of your air filters are grouped together. In order for your inventory quantities and sales to be tracked correctly, you need to group the parts correctly.

**Product Codes**
To add parts to your inventory, first you need to find the correct product code. Remember, the parts product code must match the services product code. For example, if you are adding your air filter parts and you have your air filter service in product code 2, your air filters will need to go into product code 2 also. See figure below.
To Add a new Part

1. Go to the Inventory tab, click on Management
2. Enter your password and then click on Inventory Setup
3. Select Parts from the Inventory Setup screen.

From the list of parts, select the category that you would like to add a part to. Remember to group similar parts together and to match the parts product code with the services product code.

Once you are in your selected product code, click the Add button at the bottom of the screen.
This will create a new part where you can type the part number, as you would like it to appear in the Point-of-Sale.

Note: Make sure to enter part numbers exactly. If part numbers are incorrect, parts recommendations will not display on your work order.

Once you have typed the part number, press <Enter>.

Type the part Description, which will appear on the receipt. Press <Enter>. 
Next, click the *Change* button. Circular radio buttons will appear next to all the attributes of this part that you can edit.

Click on the radio button next to *Retail Price* and enter the price of the part, press <Enter>. 
Click on the radio button next to **Your Cost** and enter how much you paid for this part. Remember, your cost is only used for reporting purposes and will never print on a receipt.

**Quantity In a Case – Rules to Order By**

- **Qty = 0** means Do Not Order this part
- **Qty = 1** means Order in Single Units and always have at least one on hand
- **Qty = X** means Order in Full Case Qty and always have at least one case on hand

Click on radio button next to **Quantity In a Case** and enter the appropriate amount, then press <Enter>.

You have successfully added the new part to your inventory. To enter quantities for this part, you will need to go to the **New Shipments** section.

**Note:** For Product Code 1, which holds all of your full services, there is no option for **Retail Price** under the parts section. Instead there is a field for **Add-on price** because the price of the filter is included in the price of the full service. In case a particular filter is more expensive, the **Add-on price** would equal the upcharge amount. The same applies to product code 3.
To Delete a Part

Highlight the part number from your parts list on the right hand side by clicking on it. Click the Delete button and click Yes if you are sure you would like to delete this part.

Service for these Parts/Parts for this Service

The Parts for this Service and Service for these Parts button allows you to freely jump between a service and its parts and back. This eliminates having to use the Go Back button to exit out of a service and go back into the parts section just to view the parts. This button is only present in the parts and services categories.

Lubricants

All of the lubricants are added to this one category, regardless of type. Make sure to price each lubricant according to the type of unit used to sell it. For instance, bulk oil should be entered in quarts, not gallons (4 quarts = 1 gallon).

To Add a Lubricant

1. Go to the Inventory tab, click on Management
2. Enter your password and then click on Inventory Setup
3. Select Lubricants from the Inventory Setup screen.

Click the Add button at the bottom of the screen.
Type the lubricant name in the *Part Number* text box and press <Enter>.

Type the *Description*, which will appear on the receipt. Press <Enter>.
Next, click the Change button. Radio buttons will appear next to all the attributes of this lubricant that you can edit. Click on the radio button next to Retail Price and enter the price of the lubricant. Remember to price the lubricant in the unit it will be sold. Press <Enter>.

Click on the button next to Your Cost and enter how much you paid for this lubricant. Remember, your cost is only used for reporting purposes and will never print on a receipt.

You have successfully added a new lubricant to your inventory. To enter quantities for this lubricant, you will need to go to the New Shipments section.

**To Delete a Lubricant**

From the Lubricants page, highlight the part number of the lubricant you want to delete from the list on the right hand side of the screen. Click Delete button and click Yes if you are sure you want to delete this lubricant.
Full Service Add-Ons
A Full Service Add-on is an additional charge that you would attach to a full service if it requires additional work or parts that you wouldn't normally include with the service. For example, you might want to charge $5 extra if you need to remove a skid plate from a vehicle. Therefore, you would setup an add-on named Skid Plate with an add-on amount of $5.00.

To Add a Full Service Add-On

1. Go to the Inventory tab, click on Management
2. Enter your password and then click on Inventory Setup
3. Select Full Service Add-Ons from the Inventory Setup screen.

Click the Add button at the bottom of the screen.

This will create an empty field where you can type the name of the Add-On as you would like it to appear in the Point-of-Sale. Type the name and press <Enter>. 
Type the *Description* of the service, which will appear on the receipt. Press <Enter>.

Next, click on the *Change* button. Circular radio buttons will appear next to all the attributes of this add-on that you can edit. Click on the radio button next to *Add-On Amount* and enter the amount you would like to charge.
If you would like to tax any portion of your add-on amount, click on the radio button next to *Taxable Amount* and enter an appropriate quantity. If not, you have successfully added a new Full Service Add-on to your inventory. In the Point of Sale, whenever you sell any service that is listed in your Product Code 1, you will have the option to select any of the add-ons that you have previously set up in your inventory.

**To Delete a Full Service Add-On**

From the *Full Service Add-Ons* page, highlight the add-on name from your list, click *Delete* button and click *Yes* if you are sure you would like to delete the add-on.
Packages
The Packages feature allows you to bundle services and add a coupon to them. This is useful if there are certain services you usually sell together, such as a full service and an air filter service. If you want to give the customer a discount for purchasing both items at the same time, you can sell them the package and the coupon will be automatically applied.

To Create a Package

1. Go to the Inventory tab, click on Management
2. Enter your password and then click on Inventory Setup
3. Select Packages from the Inventory Setup screen.

Click the Add button under Edit Packages and enter new package name. Press <Enter>.

You have created a package, now you need to add services and an optional coupon.

To Add Services to a Package

Click on the name of the package you would like to add services to. Click on a service name and then click the Add button to add it to the selected package (Add as many as six services to your package).
If you would like to add a coupon to this package, first make sure the correct package is selected. Next, click on the drop-down list under COUPON in Package section and select a coupon. This coupon will automatically be applied whenever you sell this package.

To Edit a Package

To edit a package, click on the package name, then click on individual services within the package and move them up or down in priority, or delete them. You can also add more services or change the coupon associated with this package. Lastly, you can delete the package altogether by clicking on the package name and then clicking the Delete button from the Edit Packages section.
**Coupons**

Coupons are a method by which you can deduct a dollar amount from a transaction. You can have up to 5 coupons on any single transaction.

**To set up a new coupon:**
1. From *Inventory Setup*, click on the *Coupons* category.
2. Click the *Add* button.
3. Enter the coupon name (This is the name that will appear in the Point of Sale).
4. Enter the coupon description (This will appear on the customer's receipt).
5. Click the *Change* button and then click on the radio button next to *Redeemable Value*.
6. Enter value of the coupon. For example, for a $2.00 off coupon, the *Redeemable Value* should be entered as 2.00.

You can also enter an expiration date. Once the expiration date has passed, the technician cashing out the customer will be alerted that the coupon is expired, but will be given the option to use the coupon anyway.

After setting up at least one coupon in your inventory, you will be able to view a list of your coupons in the Point-of-Sale by clicking on the Coupon menu at the top of the screen.
Discounts

Discounts allow you to deduct a percentage off of a transaction. You can only have 1 discount on any single transaction. To add a new discount, follow steps 1-6 above.

NOTE: Coupons and discounts can be combined on a single receipt.

Employees

You can enter your list of employees into the system to be able to clock them in and out, keep track of who worked on a particular day and also to be able to assign them to different positions for each car you service.

To Add an Employee

1. Go to the Inventory tab, click on Management
2. Enter your password and then click on Inventory Setup
3. Select Employees from the Inventory Setup screen.

Click the Add button at the bottom of the screen.
Enter the employee’s name (Which will appear in the Point-of-Sale) and press <Enter>.

![Image of Inventory Setup for Employees]

Enter employee’s full name (Which will be used in time clock reports) and press <Enter>.

Click the Change button and click on the radio button next to Rate of Pay. Enter rate of pay and press <Enter>.

![Image of Inventory Setup for Employees]

You have successfully added a new employee to your system. Now you will be able to clock this employee in and out in the Point-of-Sale and also assign him to different positions on open tickets.

Note: Setting your employee's rate of pay allows you to track labor costs for your shop. Although this feature is not intended as a replacement for your standard time clock, you can generate reports that will tell you the total hours an employee worked.

**Employee Permissions**

PIN permissions restrict sensitive areas of the program, such as viewing sales reports and adjusting inventory levels to certain allowed employees. Logging into the inventory program with the owner or manager level passwords will allow permissions to be assigned. Once an employee is designated as store manager, they may assign permission levels to other employees. The use of Pins and permissions is optional in Pos-i-Lube, since general password restrictions will stay in place.
To Designate a Store Manager

Select the employee you would like to designate as the store manager and then click Set Permissions.

Before assigning any permissions, you must set a 4-digit PIN for the employee. Click the button next to PIN at the bottom left of the screen and type a unique PIN.

Next, check the box next to Designate As Store Manager. Assign any permissions you would like the manager to have.

IF you would like a report of the assigned permissions, click Print.

Once an employee has been designated as a store manager, he can log in with his PIN and assign permissions for other employees.
Store manager:
- A store manager may be assigned by the owner level password.
- Once a store manager is assigned, other employees may only be assigned lesser or equal permissions than him.
- Once a store manager is assigned, the store manager may assign permissions to other employees
- Only one store manager may be assigned to each location.
- If a store manager is not designated, only the owner and manager level passwords will be able to access or grant other employees' permissions.

To Edit an Employee

From the employee screen, highlight the name of the employee you would like to edit. Click the Change button and then click on the radio button next to the line you would like to change. When you are done, press <Enter> and then Go Back.

To Remove an Employee

From the employee screen, highlight the name of the employee you would like to remove from your list. Click the Delete button and then click YES to confirm.
CHAPTER 3: Inventory Management

New Shipments

All quantities that are added to inventory must be done from the New Shipments section. This section allows you to add quantities to your existing quantities.

Note: Do not use the New Shipments feature to change your inventory values! This will cause your inventory to be tracked incorrectly. If your quantities are not correct and you need to adjust them, go to the Adjustments section.

Adding Quantities

Go to the Inventory tab, click on Management

Enter your password and then click on New Shipments.
Select *Parts* or *Lubricants*.

Select the product code of the part you need.
Select the part number you wish to enter a new shipment for.

Click the Enter Data button and enter the quantity you received.

Press <Enter> to save your changes. Your quantity on hand will now reflect the new shipment you just entered.

Note: If you are entering a lubricant make sure to enter quantities in the same measurement that you are selling that lubricant. For example, if you are entering a 55-gallon of bulk oil, enter that oil as quarts into your inventory.
Enter Adjustments

To reconcile your actual physical inventory with the inventory listed in your software you must use the Enter Adjustments option. You may use this option when you are closing out for the month, or with an appropriate password, during the month.

Note: Do not use the New Shipments feature to change your inventory to be tracked incorrectly. If your quantities are not correct and you need to adjust them, go to the Adjustments section.

Adjusting Inventory

Go to the Inventory tab, click on Reports and enter your password.

Click on End of Month.
Click on *Enter Adjustments*.

Select *Parts* or *Lubricants*.
Select the correct product code.

Select the part that you need to change and click the Enter Data button.

Enter the number of this part that you physically have on hand and press <Enter>.

Your Quantity On Hand will now reflect the amount that you physically have in your inventory.
Transferring Inventory Between Stores

It is possible to use Auto Data's inventory system to move inventory between stores. This feature allows you to track inventory that is taken from one store and sold in another.

Transfer Out

To perform a transfer, follow these steps at the store that is transferring inventory out:

1. From the main menu, click on the Inventory tab.
2. Click on Management and enter your password.
3. Select Transfers out.
4. Select Parts or Lubricants and the appropriate product code.
5. Select a particular part, and click on the Enter Data button.
6. Enter the amount to transfer out and press <Enter>.

Transfer In

At the store that is receiving the transfer, you need to:

1. From the main menu, click on the Inventory tab.
2. Click on Management and enter your password.
3. Select Transfers In.
4. Select Parts or Lubricants and the appropriate product code.
5. Select a particular part, and click on the Enter Data button.
6. Enter the amount to transfer in and press <Enter>. 
Automatic Parts Reordering

With Auto Data’s software you have the ability to automatically generate a parts order based on your store’s average monthly sales and parts usage.

The Automatic Parts Reordering feature should be used when you have been open at least three months. To learn how to set or change your Inventory Reorder Parameters, see Chapter 1: Store Setup.

There are four steps in using the Automatic Parts Reorder feature.

1. Create a parts order.
2. Edit the parts order if necessary.
3. Close the parts order.
4. Add the parts to inventory when you receive your shipment.

Creating the Order

From the Inventory tab, click on Automatic Parts Reordering and enter your password.

Select Create Order.
Select *Parts* or *Lubricants.*

Select the product code you wish to create an order for.
Answer Yes when asked if you want to create an order.

You will now get a message confirming that an order was created. If parts do not need to be ordered for the product code you selected, you will be notified that an order was not created.
Editing the Parts Order

From the *Automatic Parts Reordering* menu, select *Edit Order*.

Select the order you wish to edit by clicking on it and pressing the *Edit* button.
Select the part number you would like to edit and press the Change button.

Enter the new amount you would like to order and press <Enter>.
If you would like to add a part to your order, click the *Add* button and enter the appropriate information. Press <Enter> to jump from one field to the next.

If you would like to delete a part from your order, just click on the line you want to delete and then click the *Delete* button.
Closing and Printing the Parts Order

After you are done editing your order, you need to close it. From the Automatic Parts Reordering menu, select Close Order.

You will be asked if you are finished with this order, if not select No, otherwise select Yes.
If you selected Yes, then a prompt will appear that tells you that your order was closed successfully, click OK.

The next screen will be a report of the orders you placed. If you would like to print your order, click Print All Pages.

Add Orders to Inventory

Once you receive your orders, you'll select Add Orders to Inventory from the main Automatic Parts Reordering menu.

Click on the order that you would like to add to your inventory and click Select.
Next click the product code of the order you want to add and click Select.

Click the Add button for each part that you wish to add to the inventory. If you didn't receive a particular part, you can delete it from the order by highlighting it and clicking Delete.
If you would like to add a part, but would like to enter a different quantity than what was originally on the order, click No when prompted if you want to add the quantity to the part number. Then, enter the quantity you would like to add.

Once you have added all the parts you received to your inventory, you can delete the rest of the parts and consequently clear the order.
CHAPTER 4: Daily Procedures

Opening the Day

Before cashing out customers, you must go through opening procedures every day. To begin, click on Opening Procedures on the main menu.

Click on the radio button and enter your beginning cash drawer change. Press <Enter> on your keyboard and then click Save. When you click Save, your machine will verify that it has an available phone line or internet connection in case you need to connect with technical support at Auto Data.

Once your opening amount is saved, you are open for the day.

Now, you can also enter a custom message that will print at the top of the customer's receipt.
Time Clock
The Time Clock feature of Auto Data's software allows you to track labor hours per employee and it allows you to track labor costs anytime during the day using the Stats menu.

Clocking In & Out
To clock employees in and out, go to the Clock menu in Point-of-Sale and click on the employee's name.

You will be asked if you want to clock this employee in. Press <Y> on your keyboard to confirm.

When you are ready to clock this employee out for a break or for the day, simply follow the same process. However, the time clock will ask you to clock that employee out rather than in.
Cashing out Customers

Regular Customer: Step 1

The first step of cashing out your regular customer is to enter the customer's personal information, including name, address, and mileage.

From the opening screen in Point-of-Sale select Customer and then select Full Customer.

If not using a scanner, you must first enter the customer's license plate number or VIN. All of the customer's vehicle information and history is stored using this number.

Enter the license plate number and press <Enter>.
Enter the VIN number, if available. If not, press <Enter> to bypass VIN prompt.

For a new customer, select *Enter Customer*. To browse your customer list, select *Find by Last Name.*
If this is a new customer, enter <R>, for Mr. or <S>, for Ms. and press <Enter>.

Enter the customer's first name, press <Enter> then enter last name and press <Enter>.
Enter the customer's street address and press <Enter>. Enter the zip code and press <Enter>. Enter the phone number and press <Enter>.

Enter the customer's mileage and press <Enter>.
Regular Customer: Step 2: The Work Order

Once you have entered the customer's personal information you will need to enter the vehicle information to create a work order. Creating the work order allows you to view the recommended parts and manufacturer's severe service recommendations for the vehicle.

Vehicle Information

Select the Car I.D. menu. Select the year, make and model: if necessary, select the engine size.

Requested Lubricants

The next menu is a list of oils. Highlight the requested oil, and press <Enter>.
Printing & Viewing The Work Order

Once you have entered the Car I.D. and selected the oil, you can choose to:

1. Enter a new Car I.D., if you made a mistake entering it.
2. View the PM (Preventative Maintenance) Schedule*
3. View the work order. From this screen you can also print the work order.
4. View oil light re-set instructions (if highlighted red, the current vehicle has an oil light re-set feature)*
5. View a diagram of the engine*
6. View a diagram of the chassis*
7. Select specific services that the customer is requesting, by selecting Services from the Car I.D. menu
8. Re-select the lubricant, by selecting Lubricants from the Car ID menu.
9. Re-print static sticker, if a different oil was selected

*Note: You can only view engine, chassis diagrams, oil light re-set instructions and PM schedules if you subscribed to these databases. If you do not have access to these features contact the Sales department at Auto Data.

Continue

or

Leave this customer in your customer waiting list until you are ready to proceed to Cash-Out. To proceed to another customer, press <Insert> on your keyboard, click on the customer list on the left side of the screen or right-click your mouse to open the customer list and then select the customer you would like to go to. If you want to start a new customer, open the customer list and select an empty customer number and this will take you back to the main Point-of-Sale menu.
Regular Customer: Step 3: Building a Receipt

After all of the customer’s personal and vehicle information is entered, the next step is to enter the fluids, services, and tech information.

**Entering Fluids**

1. From the top menu select *Fluids*. On your paper work order you will see the tech notes regarding which fluids were replaced and/or recommended to be replaced.
2. Scroll though your *Fluids* menu and press <Enter> for any fluid that is marked on the work order. Then press <Enter> until you find the appropriate choice for that particular fluid.
3. To close this menu, scroll to the top until the word *Close* appears, and press <Enter>.

**Entering Tech Information**

1. From the top menu select *Techs*.
2. Your tech information will be entered in this order: *Upper, Lower, Courtesy, and Safety*.
3. Highlight a tech’s name and press <Enter> to assign him to the different positions.
4. Notice in the bottom left corner of your Point-of-Sale screen how each name is marked to indicate which position he/she performed. You only need to assign the positions you use.
5. After assigning techs, scroll to the top of the menu, select *Close* and press <Enter>. 
Entering Services
1. From the top menu select Services.
2. Select each service that was performed on the vehicle. Make sure to complete each section of each service.

Once you have entered each of the services, Scroll to the top of the menu, until the word Close appears. Press <Enter>.

Scroll to the far right and select Continue.

Regular Customer: Step 4: Printing the Receipt

The final step of cashing out a customer includes saving the customer's e-mail address, entering discounts or coupons, comments, and finally, printing the receipt.

Saving the Customer's E-mail Address (Optional)
1. From the top menu select Email.
2. Type the customer’s e-mail address. Shortcut keys are available for common extensions. Press <Enter> when done.
**Entering Discounts**

1. From the top menu select *Discount*.
2. Select the appropriate discount and press <Enter>.
3. If you need to remove this discount, open the *Discount* menu again, and select a different discount.

*Note: Only one discount is allowed per transaction.*

**Entering Coupons**

1. From the top menu, select *Coupon*.
2. Select the appropriate coupon(s) and press <Enter>. Notice that each time you select a coupon arrows appear beside it, indicating it is currently selected.
3. To remove a coupon, re-open the *Coupon* menu and de-select the coupon by highlighting it and pressing <Enter>. Select *Close* at the top of the menu.
4. Select *Total* to continue.

*Note: You are allowed up to 5 coupons per transaction.*
Comments

1. From the top menu, select Comment.
2. Highlight any comment that is appropriate for the customer’s vehicle, and press <Enter>.
3. You are allowed up to five comments per receipt.
4. Each of these comments is saved in the customer's history.
5. If you need to add a comment that is not in the list, you can add a PUBLIC COMMENT or a PRIVATE COMMENT.

PUBLIC COMMENTS can be several lines long and will print on customers receipt and be saved in the customer’s history.

PRIVATE COMMENTS can also be several lines long but will not print on customers receipt. They are for use by technicians and will be saved in the customer’s history.
6. If you need to re-select comments, select *Delete Comments Below* to clear out currently selected comments. After this, you can re-select your comments.

Note: All comments, except for *PRIVATE COMMENTS*, are printed on the customers receipt.

**Printing The Receipt**

1. If you are ready to print the receipt, select *Total* to continue to the last menu.
2. Select *Payment* and then select a payment type. If *Cash* is selected, enter the amount tendered. Press <Enter>.
   - If you need to make any changes select *Go Back*.
   - If you need to cancel the receipt select *Payment* and then *Cancel*, then click *Final OK* and enter PIN to confirm cancellation.
3. If payment type is correct and you are ready to print the receipt, select *Final OK* and press <Enter>.

Note: All cancelled customers appear on the daily sales reports.

You will get two copies of the receipt; One for you and one for the customer. If there is a printing or user error and you need to re-print the receipt, see the *Reprint Receipt* section of this manual for instructions.
Quick Customers

The Quick customer is a customer who makes a simple purchase, such as a wiper blade or a bottle of oil. As a general rule, Quick customers do not purchase any services and do not need their name or vehicle information stored in your customer history database. To learn how to cash out a customer who is purchasing services (a Regular customer), see previous section.

Cashing out a Quick customer is a two-step process:
1. Create the customer's receipt by entering the items the customer purchased
2. Select the type of payment, and print the customer's receipt.

Creating The Receipt

From the Point-of-Sale menu, select Customer, then select Quick Customer.

Select Services, and select the items the customer purchased. Click Close when done.
Printing The Receipt

Select Continue from the right corner of the screen.

Enter any coupons or discounts that the customer may have received, then select Total.

Select Payment and choose the type of payment that the customer tendered.

Verify that all of the information on the receipt is correct. If the receipt is correct, select Final OK to print the customer's receipt. If any changes need to be made to the customer's receipt, select Go Back, and make your corrections. Repeat Step 2 to cash out your customer.
Voids

During the course of the day it is sometimes necessary to delete a sales transaction from your daily sales. This process is called a void.

Performing a Void

From the main Point-of-Sale menu, click *Void*.

You will be able to scroll through all tickets cashed out today using the *Plus* button to scroll forward, and the *Minus* button to scroll backwards.
Once you have found the ticket you want to void, click *Void*. You will be required to enter your password or 4-digit pin. If you have sufficient authorization to perform a void, the void will be successful and you will be returned to the main Point-of-Sale menu.

Attach the void receipt to your original receipt for your nightly paperwork.

**Note:** Voids are ONLY for tickets that were cashed-out on the current day. You may not void a ticket from a previous day.

**In-Use Customers**

During a normal business day you will occasionally see the words In Use in your customer list. Events that can cause the creation of In-Use customers include power failures, electrical surges, or improper shutdown. You will notice that it is impossible to edit the In-Use customers. Therefore, you will need to Un-Lock these customers using the following steps.

**Un-lock In-Use Customers**

1. From the *Home* tab on the main menu select *Miscellaneous*
2. Select *Store Setup*, followed by *Software Setup*.
3. Select *Un-lock In-Use Customers*. 
When you click *Un-lock In-Use customers*, you will receive two messages:

Message 1: “*All other computers MUST be at the MAIN MENU to use this feature. Check before you continue.*”

Make sure all bay computers are at the main menu or on the Windows screen and then click OK.

Message 2: “*Clear IN USE Customers in the POINT-OF-SALE screen. You will NOT lose any customer information. Do you wish to continue? YES or NO*”

Click Yes when prompted, and your In-Use customers will be cleared. If you click No, the customers will remain locked and you will not be able to cash them out.

**Pay-Outs**

The *Pay Outs* menu allows you to track miscellaneous shop expenses that are deducted from the register each day.

**Performing a Pay Out**

Select Pay Outs from the main Point-of-Sale menu and you will see the different categories to which a pay out can be assigned.

Select the appropriate category, enter your PIN and then enter the amount of your pay out.

Press <Enter> and then click *Final OK*. You will now get a receipt of the pay out for your records.
Stats Menu

At any time during the day you can get a quick look at your sales information and your labor costs per car by using the Stats menu.

Viewing Stats

From your main Point-of-Sale menu, select Stats and you will see a breakdown of services performed and the labor costs per vehicle for the current day.

Note: Please note that the services listed in this menu cannot be changed.
Closing Procedures

When you are ready to close your shop for the day, you must go through Closing Procedures on the Cash tab. There are two required steps in order to successfully close your day. These are:

1. Entering your deposits and
2. Printing your Z-Report

If you would like to learn how to use the other tools available as part of closing procedures, scroll down. Remember however, that these must be used before entering your deposits and printing your Z-Report.

Once you have entered your deposit information you can no longer cash out customers and once you have printed your Z-Report, you can no longer access additional tools in the Closing Procedures section.

Entering Deposits

1. From the Cash tab on the main menu, select Closing Procedures and enter your PIN
2. Select Enter Deposits and click Yes if you are sure you want to continue. Remember, you will no longer be able to cash out customers today.
3. Select the Deposit type on the left side of the screen and enter the amount to deposit.
4. Repeat step 3 for all deposit types with sales.
5. Once you are done entering all deposits, click on Save Deposit.
6. Select Go Back and proceed to Print Z-report.
Z-Report

The final step to closing your daily sales is printing a Z-Report. The Z-Report generates a complete listing of your daily sales activity, including a Cash Drawer report, a Daily Sales report, an Inventory Alert report, and an Employee Incentive report.

Printing The Z-Report

1. From the Cash tab on the main menu, select Closing Procedures.
2. Make sure you've entered deposits, and then click on Print Z-Report.
3. Each report will show individually and you can choose to print it or not.
4. Clicking the Go Back button will take you to the next report until you've gone through them all.

Once you have finished viewing your closing reports, your system will automatically connect to Auto Data’s server and download any available updates (Dialup customers will connect weekly, not daily). After downloading updates a backup will automatically begin. If your USB pen drive is not plugged in, your backup will fail. Proceed to plug in your USB pen drive and go to the Cash tab and click on Backup to manually run your daily backup again.

After your backup is complete, you are closed for the day.

Additional Tools

There are additional tools available in the closing procedures section of the program. These are optional.

- **Cash Calculator** - Tool that helps you count your cash and change.
- **Cash Drawer Worksheet** - A breakdown of today's sales by payment type.
- **Hourly Report** - Hourly breakdown of services sold during the day.
- **Edit Time Clock** - Allows you to change the clock-in or clock-out times for an employee.
- **Credit Card** options are only used if Auto Data provides your credit card processing.
Cash Calculator

Pos-i-Lube includes a cash calculator to assist you with your closing procedures. This feature allows you to count your cash according to each denomination (nickels, dimes, ones, fives, etc.) Once you have completed counting your cash you may print this report to include with your nightly paperwork.

Using the Cash Calculator

1. From the Cash tab on the main menu, select Closing Procedures and enter your PIN.
2. Click on Cash Calculator.
3. Select a denomination type by clicking on the radio button to the right, enter the amount on hand and press <Enter>.
4. Once you’re done, write down the total or press Print to print the report.
5. Click Go Back to return to the Closing Procedures menu.

Note: If you do not have the key for the cash drawer, you can open the cash drawer from this page. You will, however, need to use a PIN that has this permission enabled.
Editing The Time Clock

Before a Z-Report is printed each evening and after everyone has clocked out, it is possible for a manager or supervisor to edit employee hours for that day.

Editing Employee Hours

1. From the Cash tab on the main menu, select Closing Procedures and enter your PIN.
2. Select Edit Time Clock.
3. Select the employee whose time you wish to edit.
4. Select Time In or Time Out and change the time, then press <Enter>.
5. Repeat this process for other employees, if necessary.
Daily Backup

Do Your Back-Up Every night!

It is very important for you to run your backup EVERY night. This procedure provides a "hard copy" of your data. If you do not do this daily, you are leaving your data unprotected against any type of system failure. If there is a system failure, and you do not have a current backup, there is almost nothing that Auto Data can do to help you restore your lost customer and sales information. Remember: It takes just a few minutes to perform this procedure.

How to run a Daily Backup

After you've done your closing procedures, your backup should run automatically. If for any reason, your pen drive was not plugged in, or your disk was not in the drive and your backup failed, you can simply exit out to the Cash tab and click on Backup and the system will attempt to run a backup again.

You can also go to the Home tab, click on Backup and you will have additional options.

Daily Backup

The daily backup includes all of your sales, customer history and inventory information. A daily backup will be all you need to run in most cases.

Customer Only Backup

Customer only backup will only get a copy of your customer databases.

Monthly Backup

A monthly backup will backup everything a daily backup does and in addition will backup program files needed to make Pos-I-lube run. It is helpful to have a monthly backup in case your system goes down and you are not able to connect with Auto Data technicians.
CHAPTER 5: Fleets

Setting up a Fleet
With this feature you can track your fleet sales and generate reports that contain a sales history of each fleet.

Navigate to Fleet Management:(Home tab, Miscellaneous, Store Setup, Software Setup, Fleet Data Management and enter PIN)

To Add a New Fleet Account
To add a new fleet, click the Add button. Enter each field of information for the new fleet. Once you're done entering all the data your fleet will be saved. You also have optional additional fields you can configure for each fleet. These are described briefly below:

**Authorizations** - When a fleet requires authorization before services are performed, you can specify what type of authorization is needed by selecting one option in this box.

**Information Required on Receipt** - The technician will not be able to cash out this fleet until all the items marked here as "required" are entered in the Point-of-Sale. These items will also print out on the invoices for future reference.

**Pricing/Discounts** - You can set these parameters for each individual fleet. When the fleet buys a service, the previously configured dollar discount will be automatically applied.

**Cash Only** - If this is checked, the software will not allow you to charge the ticket to this fleet. They MUST be cashed out as CASH or some other form of payment must be received.

**Tax Exempt** - This may apply to government vehicles or any vehicle that would be exempt from paying taxes. If this is checked, tax will not be applied to the ticket when this fleet is cashed out.
Checklist
Using the checklist feature, you can type in items that need to be done when a particular fleet comes in. There is a master checklist that will be accessed when you click on the Check List button. From this screen you can both add items to the master list, or add items to the selected fleet by clicking on Copy Item to Fleet Below. You can also move the order the items are listed under the fleet name, by using the Move Up, Move Down, or Delete buttons.

Modifying Accounts
If you've entered some data wrong on a fleet or need to change it for any reason you can select the radio button next to the line you want to change and then edit the field individually.

If you'd like to delete an account, simply select the fleet by highlighting the fleet name and click Delete. Click Yes to confirm delete.
Cashing-Out a Fleet Customer

The process for cashing-out a fleet customer is basically the same as cashing out a Regular customer with two exceptions: Entering the fleet name and selecting the Fleet payment type.

Select the Fleet Account

1. Click Customer and then select Fleet Customer.

2. Enter the VIN number, or license plate.
3. Type in the first few letters of the fleet's name and press <Enter> to pull up the fleet list.
4. Click on the appropriate fleet name to select it.
Note: If this does not pull up a list of your fleets, verify that fleet lookup is set to “ON” in store setup and verify that you have set up your fleet accounts.

Continue to input data for the transaction as you would any regular customer.

Fleet Options

When you have a fleet customer in your Point-of-Sale, your Fleet button becomes active. You can click on the Fleet button anytime during the transaction to review options that were specifically configured for this fleet. Some items will require you to enter data or confirm the service has been done. To enter data in the Required Fleet Information box, click on the checkbox next to the line you want to edit.

Select the Fleet Payment Type

At the Payment menu, select Fleet.
Your fleet options box will pop-up on the screen so you can make sure everything was completed to specifications. If any required information is not filled in, you will not be able to cash out this fleet until it is. Click Go Back when you are ready to continue.

Click Final OK to cash out the fleet. As long as you selected the fleet account from the fleet list at the beginning, the fleet's account number and any required information will appear on the receipt. You will get three copies of your fleet invoice: one for you, one for the driver and one to bill with.

**Fleet Sales Report**

If you have setup your fleet accounts you can generate a sales report which gives a breakdown of the vehicles, receipt numbers, and total charges for each of your fleet accounts.

From the Cash tab on the main menu, select Sales Reports, Past Sales Reports, enter PIN and then Fleet Sales. Select the dates you wish to be on your report and click OK.
Select the fleet names you want on your report and click OK.

Note: If you select a large range of dates, or all Fleets are selected, this report might take a few minutes to generate.

To view a sample fleet report, please go to the Reports section of this manual.
CHAPTER 6: Communications

Remote Maintenance

If you ever need help or need changes made to your program, such as editing your comments list, you will need to call us first and we will ask you to go to Remote Maintenance. At this point you will need to click on your Communications tab, Remote Maintenance, and then click Yes to continue.

When you click Yes, your computer initiates a connection and then allows us to log in. Once we are connected, we will be able to make changes to your files or fix any problems.

Keep in Mind

- We are only able to log into your computer when you initiate the connection, meaning when you click on Remote Maintenance.

- If you ever need to connect with us, you need to call and let us know you will be initiating a connection, otherwise, no one will be expecting your connection.

- You must have a phone line and a working dial-up modem available in case you need to connect with us. In cases where a DSL connection is available, we will attempt to connect with that first. If for any reason your DSL is unavailable, you will still always need to have a working dial-up modem and a phone line.
AutoPoll.Net

AutoPoll.Net is a service which enables you to upload your sales data to our server, where you may access it from another location, such as your back office. AutoPoll.Net is a subscription service and you will need to call the Auto Data sales department at 1-800-767-7580 to sign up.

This feature is most useful for companies that own several locations and therefore use our Enterprise Control back office software. However, smaller companies will also benefit by being able to access sales data throughout the day on the Internet and being able to download sales data to be used together with QuickBooks programs.

How AutoPoll.Net works

AutoPoll will connect to the Internet during closing procedures. After you run your Z-Report, AutoPoll will connect and send your sales and inventory data to our server. From there, your back office will have access to that information. Autopoll will also download any updates you have available and any price changes from your back office.

If AutoPoll does not connect during closing procedures, go to the Communications tab and click on AutoPoll.Net to try again. Visit our FAQ section for troubleshooting tips. If AutoPoll consistently fails after trying these tips, contact Auto Data tech support.

If you would like current sales data available online throughout the day, learn more about activating the Push Sales feature of the Autopoll service.
Push Sales

Push Sales is an optional service available when you sign up for AutoPoll.Net. This program will be launched when you first start up your computer and will have a box that looks like the image below. This box must stay open during the day in order for Push Sales to function properly.

Note: To minimize this box, click the *Hide* button, not the X on the top right, because this will terminate the program.

How Push Sales works

If you are currently using dial-up as your method of connection, then your sales data will be "pushed" to our server at 10am, 2pm and 4pm. Depending on the speed of connection, this process should last between 3-5 minutes. If you are using DSL or high speed internet, then your sales data will be sent up every 5 minutes and should only take a few seconds.

If for some reason, your push sales program is not open, you can re-open it by:

1. Going to the Home tab
2. Clicking on Windows options and Exit to Windows
3. Clicking on Start and All Programs
4. Clicking on Startup
5. Clicking on Push Sales
Auto Update

Auto Update allows you to stay current with all new software version releases. These releases may include new features, requested changes and bug fixes. If you do not use the Autopoll.Net service, you will not receive an auto update unless you manually initiate one. We recommend running an Auto Update weekly after closing procedures to download any available files. If you use dial-up, this process may take up to 20-25 minutes if you haven’t updated in a long time or if we are releasing new software. If you are using DSL, this process should take less than 5 minutes.

How to run an Auto Update

1. From the main menu select the *Communications* tab.
2. Click on *Auto Update*.

At this point, your computer will start a connection and download any available files. If your update is not successful, visit our FAQ section. If you are still not able to auto update, call Auto Data technical support.
E-Mail

The E-Mail feature in the Pos-i-Lube program is for internal use only. You will be able to write e-mails to Auto Data, to your back office location or to other stores within your company. If you need help adding stores to your e-mail list, contact Auto Data. To access E-mail functions, go to Communications and then click E-mail.

How to use E-Mail functions

To write an E-Mail:
1. Select Recipient (Auto Data, Other Stores, or OFFICE)
2. Enter the person's name who you will like to receive the e-mail in the To field.
3. Enter your name in the From field.
4. Type the content of the message
5. Click Send once you are finished

Your E-Mail will be sent once you connect to AutoPoll.Net, either by clicking on AutoPoll.Net on the Communications tab or automatically after you close for the day. If you are not signed up to use AutoPoll.Net, your e-mail will be sent when you run your next Auto Update.

To read, print or delete your E-Mails, click on the appropriate item on the main E-Mail page.
To export E-Mail addresses
You can now export a list of your customer’s email addresses into a data file on your computer. You are going to build a file named EMAIL.csv. You can either create a new list or add to an existing list.

If you would like to create a new list, click "ERASE List" and make sure "Customers in List" equals "0". Once you are ready to build your list, follow the steps below:

1. Select a starting date
2. Select an ending date
3. Click EXPORT to List
4. Find your EMAIL.csv in your \POS folder.

This file is compatible with Constant Contact and can be used for other email marketing.
CHAPTER 7: Reminder Cards

Getting Started

To print reminder cards, go to the Home tab on the main menu and select Reminder Cards.

Before you begin configuring Reminder Cards however, you will need to follow a few simple steps:

1. Purchase a set of reminder card paper for your HP LaserJet printer. These forms can be ordered from Computer Forms Inc. at 1-800-547-8027.

2. Know which zip codes you would like to send reminders to. Come up with a low zip code (i.e. 12001) and a high one (i.e. 12099) that you would like to include in your mailings.

3. Once you've come up with your range of zip codes, contact Auto Data to have them set up a zip code database.

4. Once Auto Data technical support has set up the zip codes for you, you can do an Auto Update to receive them and edit your zip code list, if necessary.

5. You're ready to begin configuring your reminder cards by going to Reminder Cards Setup.

Printing Samples

If you would like to see what your cards will look like once they are printed, you can select Print Samples on the reminder cards menu. This will show you the exact placement of data on the cards.
Editing Zip Codes
To ensure that you send reminder cards to all customers in your area only, you must view and edit your zip code list. The zip code list should contain all the zip codes in your area.

Once you've obtained your zip code list from Auto Data you can add, remove and edit zip codes in the list using the buttons on the Edit Zip Code page.

- **Add** Button: Allows you to add zip codes to your list.
- **Print** Button: Will print your zip code list.
- **Change** Button: Allows you to change the details of a particular zip code.
- **Delete** Button: Deletes a zip code from your list.

Reminder Card Setup
You can decide which customers should receive a reminder card. To configure your reminder card program, from the Reminder Cards tab, click on Reminder Card Setup.
Once you are in *Reminder Card Setup*, click on the radio button next to the line that you want to change.

Click *Go Back* when you are done, and your settings will be saved.

**Reminder Intervals** – You can choose at which intervals customers should receive reminder cards.

**Direct Output To:**

- **Laser Printer** - Will print cards directly to your printer.
- **Reminder File** - Will print a list of customers that are due for a reminder card to a REMINDER.CSV file located in a REMINDERS folder on your root drive.
- **No Printer - No File** – This option will select the customers who are due for a reminder card AND have an email address on file and will put them into an EMAIL.CSV file located in a REMINDERS folder on your root drive. Note: Make sure you select EMAIL FILE checkbox!

**Second Reminder Option** – You can select to send a second reminder if a customer has not returned in a specified number of days.

**Custom Message** – You can add a custom message for your customers.

**Add to Name** – Option to add "or Current Resident" to address. This will prevent having reminder cards returned to you if your customer has moved.

**Printer Delay** – Will bypass the 8 second printing delay needed for older printers.
Reminder Cards: Printing

Once you have edited your zip code list and setup you Reminder Card parameters, you are ready to print your reminder cards.

From the Reminder Card tab, click Print Reminder Cards.

Select the appropriate store number. If you only have one store, your store number will most likely be 0001. Click OK to continue.

Click Yes if your reminder cards are loaded in the printer. At this point, your cards will begin printing. If you need to pause the printing, you can click Go Back. If you would like to stop the printing, click Yes at the prompt.

When the reminder cards are done printing, you will get a message saying the process is complete.
CHAPTER 8: Reports

Daily Reports

Z-Report - The nightly sales report.
- Cash Drawer Detail Report - A breakdown of today's sales by payment type.
- Employee Incentive Report - A breakdown of sales per employee position.
- Inventory Alert Report - Alerts you of any parts you may need to order immediately.

Other Daily and Sales Reports
- Work Order - Gives parts and service recommendations for vehicle.
- Oil Light Re-set - Detailed instructions on re-setting oil light.
- Cash Calculator - Used to tally nightly cash.
- Time Clock Report - Provides a list of employees and employee hours.
- Consolidated Daily Sales - Combined sales information for selected date range.
- Fleet Sales Report - Past fleet sales

End of Month Report

At the close of each month you can print a detailed summary of your inventory. This report, called the End of Month Report, gives a complete breakdown of your inventory on hand as well as your sales information for the month. You also have the option to print the previous month's report with your current report.

The End of Month Report can only be printed after you close on the last day of the month or before you open on the first day of the month.

Printing the End of Month Report

To access the end of month report options, go to the Inventory tab, click Reports, enter your PIN and then click End of Month. Printing the End of Month Report consists of three steps:

1. Printing the Physical Worksheet
2. Entering Adjustments
3. Printing Current End of Month
Printing the Physical Worksheet

1. Select *Print Physical*.
2. If you would like to print out ALL items in your inventory, click on ALL OF THE ABOVE button.
3. Click *Print All Pages* button at the top of the screen.
4. Count your inventory and record your numbers on the printed worksheet.
5. Compare the computers’ “Quantity-on-hand” with your actual on-shelf quantities.

Entering Adjustments

If you have any discrepancies between what the computer says you have and what you actually have you need to enter adjustments.

1. From the *End of Month* menu, click *Enter Adjustments*.
2. Browse to the part you would like to adjust.
3. Make sure the correct part number is highlighted.
4. Click the *Enter Data* button.
5. Enter the actual number on hand.
6. Press <Enter>.
7. Go back and repeat steps 2-6 for every part you need to adjust.

Printing Current End of Month

Once your computer quantities match your on-shelf quantities, you are ready to print your *End of Month* Report.

1. Make sure you have enough paper in your printer. You will probably need 30-40 pages, depending on the number of parts and services in your inventory.
2. Click *Print Current End of Month*.

**NOTE:** If you are trying to close out for the month, DO NOT print the Previous End of Month as it is not the correct End of Month report. To properly close out for the month you MUST print the Current End of Month.

Year End Report

At the conclusion of your fiscal year, you will print the *Year End Report*. This report will give you a complete breakdown of your inventory for the fiscal year. This report must be printed after you print your *End of Month* report.

Printing The Report

1. From the *Home* tab on the main menu, select *Miscellaneous*.
2. Select *End of Year Closing* and click *Yes* when asked if you are sure that you want to close out.

**NOTE:** DO NOT do this unless it is the end of the year! If you do a Year End Closeout and it is not the end of the year you will not be able to open again for any date in that calendar year.
CHAPTER 9: Hardware

HP LaserJet P2035n Receipt Printer
Auto Data's Point-of-Sale systems use HP LaserJet printers for printing receipts and work orders. As of this writing the printer that is currently available for purchase and is supported is the HP LaserJet P2035n. Other printers that are also supported but no longer manufactured are the HP LaserJets 1320, 1160 and P2015. The HP LaserJet prints on plain white paper, and prints your logo in the top left corner of your receipts. If your printer is not printing or printing improperly you can go to our FAQ - Troubleshooting page to find answers to our most commonly asked questions.

If you are having trouble printing from a 3rd party software package such as Microsoft© Word™ or Excel™, please contact Hewlett Packard© or visit the Hewlett Packard's© website. If you are having trouble printing in the Point-of-Sale, call 1-800-583-LUBE (5823) to reach our technical support department.

Installation
Before you install your HP LaserJet, please follow HP's guidelines for installing the toner cartridge and printer cable. Ensure that you remove any orange tape or tabs from the printer and the toner cartridge before attempting to use the printer. Install the printer drivers from the CD or follow any directions provided with the printer.

Once that is done and you are able to print a test page from Windows, call Auto Data for help in setting the printer up for use with the Pos-I-Lube software.

To test the printer in Pos-I-Lube:

- From the Home tab, click Miscellaneous.
- Select Store Setup.
- Select Hardware Setup.
- Select Receipt Printer.
- Select HP LaserJet Printer on appropriate port.
- Select Test This Printer.
- Your printer should now be functioning. Be sure to re-start the Auto Scan program so that it can pick up the new printer settings.

Static Sticker Printer
Auto Data supports two types of static sticker printers. They include the Cognitive Advantage LX and the Del Sol LX.

Installation NOTE: No drivers are necessary to run the static printers. Any attempt to load these drivers may cause your printer to stop functioning properly.

- From the Home tab, select Miscellaneous.
- Select Store Setup.
- Select Hardware Setup and enter your password.
- Select Static Sticker Printer.
- Select the appropriate option depending on your type of sticker printer.
- Finally, select First Time Setup and follow the directions on the screen to calibrate your printer.

Once you have completed these steps, you can click the Test This Printer button to print a test sticker, however the best test of the printer is to print a sticker from within the Point-of-Sale using a Car I.D.
General Tips

Print one sticker at a time, then tear the sticker off. Printing several stickers at a time and leaving them hanging will drag the stickers down while printing and will result in poor print quality.

Auto Data only supports stickers and ribbons from Communications Graphics, or Computer Forms Inc (CFI). Please contact CFI at 800-547-8027 if you need to place an order.

Keep the thermal printer in a cool area, away from direct sunlight.

Store static stickers and ribbons in a cool area. If these are stored in heated weather they may be damaged, which would result in poor print quality.

Advantage LX

To Open Printhead

Open the dust cover. Slide back the black latches to release the print mechanism. Raise the mechanism to prepare to load print media or ribbon and to clean the printer.
To Load Ribbon

Unwind a few inches of the new ribbon from the supply core. Pull gently on the supply core mount flexible arm and insert the ribbon supply roll.

Turn the ribbon takeup core A (see inset to align the slotted end with the takeup mount C. Gently pull the flexible arm out and snap the takeup core into place.

Note: The printer automatically takes up the slack in the ribbon.
To Load Stickers

Lift out the media spindle. Load the media onto the spindle, keeping the black media guide to the right of the media roll.

**IMPORTANT**! The imaging surface must face up as it passes under the print mechanism.

Place the loaded media spindle in the printer with the black guide to the right. Feed the media under the openprint mechanism.

Note: The media spindle should fit securely with the black guide pressed securely against the media roll.

Maintenance (Recommended with every new roll)

Clean the print head, drive roller, and the index sensors C and D with a soft, lint free cloth lightly saturated with 99% isopropyl alcohol. Press the FEED button to clean all sides of the roll.

**CAUTION**! Incorrectly cleaning the printer will cause permanent damage and void the printer’s warranty. Cognitive recommends using a certified cleaning pen for all your printer’s cleaning requirements, P/N 60-14-06-0002.
Del Sol LX

Open Printer

Open the dust cover. Press the black latches to release the print mechanism, then lift the mechanism until it locks in place.

Note: The printhead latches require some force to release.
Load Ribbon

A. Pull out the small green knob and hold. Align the ribbon supply roll notches with the mounts and release the knob.

B. Lower the print mechanism and open the mechanism cover. Install the take-up core in the same way as the supply roll. Turn the take up knob clockwise until the ribbon is taut.

Note: A little wrinkling in the ribbon is normal and will not cause printing problems.

Load Stickers

A. Load the media with the imaging side face up.

B. Slide the media under the print head and through the slot in the front panel. Pull the media taut.
Maintenance (Recommended with every new roll)

C. Lower the print mechanism and press down firmly to secure both latches.

Note: The latches click when fully closed.

Clean the print head (A), drive roller (B) and the Index sensor (C) with a soft, lint free cloth saturated with 99% Isopropyl alcohol. Press the FEED button (D) to clean all sides of the roller.

Caution! Incorrectly cleaning the printer will cause permanent damage and void the printer’s warranty. Cognitive recommends using a certified cleaning pen for all your printer’s cleaning requirements, P/N 60-14-00-0002.
Scanner

The portable scanner unit has two components: the handheld device and the cradle that relays the information from the CPU to the scanner unit.

Hardware Installation

1. Make sure the CPU is powered off.
2. Plug the data cable from the cradle to COM2 on the back of your CPU.
3. Plug the end of the data cable that looks like a large telephone plug, into the cradle.
4. Plug the power cable into the cradle.
5. Plug the power supply into your power outlet.
6. Turn on your CPU.

Your handheld should now be ready to use. If you have any problems please contact Support.

NOTE: If this unit is an upgrade to your system you may need to call technical support for further configuration.

Scanner Inventory Setup

On computer:

1. Go to Inventory tab and click on Scanner Setup
2. Click on the radio button next to Full Services and add the services you would like to appear on your scanner. Repeat for Services and Lubricants.
On Scanner:

1. Press the (*) key to return to the main menu.
2. When the prompt says Autoscan options, scroll down to option 3.
3. Press Enter to upload inventory. Your inventory changes will now reflect on the scanner.

**How to use Scanner**

When you first pick up the scanner it should say "Greet Customer". Press Enter on the scanner and it will say "Scan Vehicle". The scanner is now ready to use.

1. Scan the VIN barcode of the vehicle in the door-jam or windshield for GM's.
2. Repeat customer's name will show on the scanner and you can enter the mileage.
   Or – A new customer's vehicle information will display. You will also need to enter the mileage and then enter the customer's name and address on the computer, at cash out.
3. The oil that was used on the last visit will display, and you can confirm or change it.
4. You can review the customer's service history right from AutoScan.
5. Select the type of full service and sell any needed add-on services
6. Print the Chek-Chart work order and static sticker and move on to the next vehicle.

Now you can open the customer list in your Point-of-Sale and pick the customer listed as “AUTOSCAN”. If the customer is new, you will need to enter the customer information(name, address, etc.) before cashing them out.

**Scanner Tips**

- Scan at an angle, not directly at the bar code
- Closer isn’t better, back the scanner away from the bar code so that you scan the entire bar code and some area on both sides of bar code.
One effective technique is to start with the scan line off the bar code, then move it onto the bar code.

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Scanner Troubleshooting

If you are getting scanner errors:

1. From scanner main menu, select 4) Test Scanner
2. Stand within 3 feet of the cradle.
3. Select SHORT RANGE TEST
4. If the scanner reports CRADLE: FAILED then either the cradle has no power or the scanner is not paired with the cradle.
5. If scanner reports COMPUTER: FAILED, then either the serial cable is not plugged in properly or Auto Scan is not running.
6. When the scanner reports CRADLE: PASS and COMPUTER: PASS, proceed to the LONG RANGE TEST.
7. If the scanner reports SEND: FAILED, SEND: WEAK, or RECEIVE: WEAK then scanner is out of range or obstructed by a large object or being interfered with by a cordless phone, etc. and that location is outside the effective transmission range. (Logic would suggest that a FAILED transmission is further out of range than a WEAK transmission.)
8. Move around the shop repeating the LONG RANGE TEST until an effective Scanner Transmission Range is determined. If the range is not acceptable then:
   a. Make sure there is not a cordless phone in the shop.
   b. Relocate the cradle (using a longer serial cable if necessary) to a better location and repeat the entire process starting with the SHORT RANGE TEST.

Additional things to check:

- Exit out to Windows and make sure the Auto Scan program is running, if not click on scanner icon to open Auto Scan and try to scan a car again.
- If program is running, close it and open it again.
- Unplug both cables from cradle and then plug them back in.
- Pair the scanner with the cradle. To do this:
  1. Press Enter on the scanner to clear the error code.
  2. Press the (*) key to get back to the main menu.
  3. Scroll to option 2 (New Shipment) and press Enter.
  4. When the prompt says SCAN BOX, scan the barcode on the scanner cradle.
  5. Press the (*) key to get back to the main menu.
  6. Scroll to option 3 (Upload Inventory) and press Enter.
• If you were able to complete these steps without a scanner error, your scanner should be ready to use.
• Make sure you are not using a 2.4ghz phone or device in the same location where you operate the scanner, this is a known issue.
• Make sure your scanner is plugged into COM2.
• Check scanner cables for any cuts.
• Make sure your scanner is fully charged.
• If you are having trouble pairing the scanner, you may remove the battery and re-insert it and try pairing again.

If you are still not able to scan a vehicle, contact Auto Data Technical Support.

VIN Grabber

The portable scanner unit has two components: the handheld device and the base that relays the information from the CPU to the scanner unit.

Installation

1. Make sure the CPU is powered off.
2. Plug the data cable from the handheld base to the your COM2 port.
3. Plug the end of the data cable, that looks like a large telephone plug, into the handheld base.
4. Plug the power cable into the data cable that is plugged into the computer.
5. Plug the power supply into your power outlet.
6. Turn on your CPU.

Your handheld should now be ready to use. If you have any problems please contact Support

*NOTE: If this unit is an upgrade to your system you may need to call technical support for further configuration.

How to use

Once your scanner has been installed and configured, all you need to do is make sure the AutoScan program is running on your computer and then scan a car. It's that simple. To pick up your recently scanned customer, open your Point-of-Sale and select the customer that says VIN GRABBER.

Troubleshooting

If you are having trouble scanning VINS: Exit out from the Pos-i-Lube software to your Windows page and make sure your AutoScan program is running. It should be running at all times.

Close the AutoScan program and open it again by clicking on the scanner icon.

If your scanner beeps, but the customer doesn't transfer into Point-of-Sale, try pairing your scanner with the cradle by scanning the bar code on the cradle and then scanning another vehicle.

If you are still not able to successfully scan a vehicle, call technical support.
Cash Drawer

Auto Data supports one model of the Indiana Cash Drawer and the APG USB cash drawer. These drawers can only be purchased from Auto Data if they are to open automatically from your point of sale. If your drawer was purchased from another source, you will not be able to receive support for it from Auto Data.

Installation

No changes must be made to the software when installing your cash drawer. Once you have connected your drawer you can test it from the software:

1. Go to Home tab, followed by Miscellaneous.
2. Select Store Setup, Hardware Setup and then Cash Drawer.
3. Select either USB Cash Drawer or Indiana Cash Drawer (depending on your unit).
4. Click on the Test Cash Drawer button to pop the cash drawer.

If the drawer does not pop, check each connection and make sure that the drawer is un-locked (key hole straight-up).

APG Cash Drawer

Plug in USB cable to bottom of drawer and then other end to the back of your CPU.

Additional Troubleshooting for USB Drawer:

1. Plug the USB cable from the cash drawer to the computer.
2. Open the cash drawer.
3. Take the till out.
4. Push up on the cash drawer and pull it out (past the stopper on the bottom).
5. Use the following to determine the problem then continue:
   - Blinking lights back and forth (like a railroad track) means the drawer has connection with the computer
   - Blinking lights at the same time means the drawer has power but no connection to the computer
   - No blinking lights means the drawer is not getting power, check USB cable
6. Unscrew the 2 screws on the bottom of the Cash drawer.
7. Pull out the piece you just unscrewed
8. Make sure all connections are plugged correctly.
9. Re-screw the metal piece and test again.

If your cash drawer still does not open, call Auto Data.

Indiana Cash Drawer

Make sure that both the data cable and the power supply are connected when you install your cash drawer. The data cable is connected to the port on the back of your CPU that is labeled Cash Drawer.
FREQUENTLY ASKED QUESTIONS

Daily Operations

HOW DO I SWITCH BETWEEN CUSTOMERS IN MY CUSTOMER WAITING LIST?
Your active customers are saved in your customer waiting list until you are ready to cash them out. To switch to another active customer, click on their vehicle type in the customer list on the left side of the screen. To start a new customer, click on an empty number. To view your entire open customer list, either press the <Insert> key on your keyboard, or right-click your mouse in the Point of Sale screen.

HOW CAN I REMOVE "IN-USE" CUSTOMERS FROM MY CUSTOMER WAITING LIST?
Use the Unlock In-Use Customer Feature. Customer information will not be lost using this feature. From the Home tab on the main menu select Miscellaneous. Select Store Setup, followed by Software Setup. Finally, select "Unlock In-Use Customers." The process takes only a few seconds. Once you're done you can return to the Point-of-Sale.

IS IT POSSIBLE TO WRITE AN ESTIMATE?
Yes, simply select Estimate as the payment type.

HOW DO I VOID A RECEIPT AFTER CASHING OUT A CUSTOMER?
If it is necessary to void a customer after cash out, you can use the Void feature. Simply click Void from the main Point-of-Sale menu and then click Plus or Minus to scroll through your cashed-out tickets. Once you find the ticket you would like to void, click Void. Remember that you can only void tickets on the same day.

HOW DO I REPRINT A RECEIPT FROM A PREVIOUS DAY?
First, pull up the customer and go to their history. Click View History and scroll the report to find the date of the visit you would like to reprint. Return to the main History menu. Click Reprint receipts and you will see all the visit dates and any receipts available for reprinting will have have a receipt number next to the visit date. If there is an n/a next to the visit date, this customer was cashed out with version of the point of sale that did not save receipt data and therefore cannot be reprinted. If there is a receipt number present, click that line and a duplicate receipt will be sent to your receipt printer.
HOW DO I VIEW A CUSTOMER’S HISTORY WITHOUT HAVING TO CANCEL THE RECEIPT?

With the new Review Customer in version 9 of Pos-I-Lube you can 1) review a history, 2) reprint a receipt, and/or 3) make changes to contact information without having to print a receipt or cancel the customer. To start a Review Customer, go to Customer, and then select Review Customer, click Search and locate the customer. Enter the mileage, if available. Now you have access to the customer’s information. When you are done with your changes, click Save.

HOW DO I CASH OUT A TOP OFF?

First, you have to add the top off service to your inventory. To do this 1) Go to your inventory services setup and select an available product code 2) Enter “TOP OFF” as the new service name 3) Click Change and set Call Up Lubricants to “Y”.

A top off service will only be allowed within 3,000 miles of the last full service. To cash out the top off service, select Top Off from your Services list and select the oil and quantity. The maximum quantity allowed for a top off is 1 quart. Make sure top off is the only item on the ticket. Finally, select Top Off as payment type and click Final OK to print the receipt.

HOW DOES THE CUSTOMER LOYALTY PROGRAM WORK?

Now you can reward your most loyal customers with a free service. Every time your customer purchases a full service, a point is added to their total. To check a customers’ point total, go to their history and look under the heading Customer Loyalty Program. The customer will be allowed a free service on the visit after reaching their points’ goal. You will receive a reminder on the day the free service is due. If the free service is redeemed, you have the option to re-set the customers points total to zero. Call Auto Data to activate this free feature.

WHY SHOULD I DO A DAILY BACKUP?

Data Protection. Your backup should be done daily to keep important information current. In case of hardware failure, everything we need to get you back up and running will be on your pen drive. Fortunately, after closing, your daily backup runs automatically if you have your USB pen drive plugged in. If you forgot to plug in your drive and the backup fails, simply plug in your drive and go to the main CASH tab and click Backup.
WHY DO I GET AN ERROR WHEN I TRY TO CONNECT WITH AUTOPOLL.NET OR TRY TO RUN AN AUTOUPDATE?

One of the main reasons you might have trouble running an Autopoll is that you may not have an available internet connection. Check and make sure you have a phone line connected to your computer's modem. In case you use DSL to connect, make sure you can access an internet page. If you cannot access an internet page, you may need to power cycle your DSL modem or contact your internet service provider. Once you are able to access the internet, you will most likely be able to run an Autopoll. If your Autopoll fails, try again later. If it consistently fails, contact Auto Data technical support.

WHY AM I GETTING THIS MESSAGE "YOUR SUBSCRIPTION TO PARTS PRONTO HAS EXPIRED"

Parts Pronto is the service that enables you to see manufacturer recommended part numbers and vehicle specifications on your work orders. This is a quarterly service, which is renewed when you pay your quarterly bill. In some cases, this is a monthly subscription. When your subscription expires, you will see a courtesy message and you will have the option to check online for updates. If you have already paid and see this message, click Yes to update and your renewal should download.

WHY CAN'T I LOOK-UP MY FLEET ACCOUNTS IN POS?

Verify that your Fleet Lookup is on. From the Home tab on the main menu select Miscellaneous. Select Store Setup, followed by Software Setup. Go to Store Information Setup. Verify that Fleet Lookup is turned on. Select Go Back, and select Fleet Management to manage your fleet list.

WHY AM I NOT ABLE TO VIEW A WORK ORDER?

Your Parts Pronto subscription may have expired. Parts Pronto is the service that enables you to see manufacturer recommended part numbers and vehicle specifications on your work orders. This is a service which is renewed when you pay your quarterly bill.

If you have already paid to renew and still cannot view a work order, just run an Auto Update to download your renewal. If you have not paid to renew, you need to call Auto Data when you are ready to re-subscribe to Parts Pronto.
Network Troubleshooting

WHY IS MY BAY COMPUTER NOT PULLING UP POINT-OF-SALE?

Lost Network Connection. Your bay computer reads the Point-of-Sale program from your server computer. If the bay is not pulling up the Point-of-Sale, then your network might have lost connectivity. Check your network cables. Try power-cycling your print server, by unplugging the power to it for twenty seconds and then plugging it back in. You can also try shutting down the computers in this order: 1) Shut down bay 2) Shut down server 3) Start up server and 4) Start up bay.

WHY DO I GET THIS MESSAGE: "PRINT SERVER IS NOT READY"?

Lost Network Connection. Your print server might have temporarily lost network connection. Try locating your print server (this will be the small box which will have your computer and your printer plugged into it), unplugging the power to it for twenty seconds and then plugging the power back in.

Printer Troubleshooting

WHY IS MY RECEIPT / WORK ORDER PRINTER NO LONGER PRINTING OR PRINTING IMPROPERLY?

Regardless of the error message, test each of the following procedures.

1. Reset printer by turning printer off and turning it on again. If printer still fails proceed to troubleshooting step 2.

2. Check the cable and power connections. Unplug and re-plug the connection between the printer cable and the printer as well as the connection between the printer cable and the computer. After you verify that the printer connections are properly and securely connected, and that the power is on, then go to step 3.

3. Replace toner cartridge and print a work order or receipt. If printer fails proceed to step 4.

4. Verify the status of the printer. Unplug and switch both printers. If printer fails after being switched, and printer failed after step 1, then the failure in the printer, the cable, or the printer port. Call Auto Data technical support for further assistance.

WHY IS MY RECEIPT / WORK ORDER PRINTER GIVING THE ERROR MESSAGE "OUT OF PAPER" WHEN THERE IS PAPER IN THE PRINTER?

For the HP LaserJet’s verify that the paper is loaded correctly and that there is not too much paper in the paper tray. Verify that the green ready light is on and that the yellow warning light is not flashing. Check the connections on the printer and the computer and finally unplug the printer and plug it back in. If you have anymore problems contact Auto Data for further assistance.
WHY IS MY STATIC PRINTER NOT PRINTING CORRECTLY AFTER I RELOAD MY STATIC RIBBON OR STICKERS?

Your printer may need to be re-calibrated. After the printer has been reloaded it is sometimes necessary to recalibrate the printer within the Pos-i-Lube program. From the Home tab on the main menu, select Miscellaneous. Select Store Setup followed by Hardware Setup. Finally select Static Sticker Printer. Select First time setup. Follow the procedures as directed. If this does not help, or results in a red light on your sticker printer, try using the diagrams in the sticker printer section of the manual to re-load stickers and ribbon.

WHY AM I NOT ABLE TO PRINT STATIC STICKERS?

Check your static sticker printer and make sure it is ON and has a green ready light. If you have a red light, try re-loading stickers and re-loading ribbon and closing printer cover correctly. Check in Hardware Setup in your Pos-i-Lube program and make sure correct sticker printer is selected. If stickers are still not printing, check network and try a first time setup.

Scanner Troubleshooting

WHAT DO I DO IF I AM GETTING ERRORS ON MY SCANNER?

1. From scanner main menu, select 4) Test Scanner
2. Stand within 3 feet of the cradle.
3. Select SHORT RANGE TEST
4. If the scanner reports CRADLE: FAILED then either the cradle has no power or the scanner is not paired with the cradle.
5. If scanner reports COMPUTER: FAILED, then either the serial cable is not plugged in properly or Auto Scan is not running.
6. When the scanner reports CRADLE: PASS and COMPUTE R: PASS, proceed to the LONG RANGE TEST.
7. If the scanner reports SEND: FAILED, SEND: WEAK, or RECEIVE: WEAK then scanner is out of range or obstructed by a large object or being interfered with by a cordless phone, etc. and that location is outside the effective transmission range. (Logic would suggest that a FAILED transmission is further out of range than a WEAK transmission.)
8. Move around the shop repeating the LONG RANGE TEST until an effective Scanner Transmission Range is determined. If the range is not acceptable then:
   a. Make sure there is not a cordless phone in the shop. b. Relocate the cradle (using a longer serial cable if necessary) to a better location and repeat the entire process starting with the SHORT RANGE TEST.

For additional scanner troubleshooting, please check the scanner section of this manual.

WHY AM I NOT GETTING A STICKER WHEN I SCAN A CAR?
First, try printing a sticker from the Point-of-Sale. If you are able to print a sticker from the Point-of-Sale and not from the scanner, try closing your Auto Scan program and re-opening it. This will allow the scanner to pick up any recent changes to your system and should enable you to print a sticker.

Software Troubleshooting

WHY AM I GETTING INCORRECT CUSTOMER INFORMATION OR NO INFORMATION WHEN I ENTER A CUSTOMER’S LICENSE PLATE NUMBER?

Customer database needs to be re-indexed. Over time it becomes necessary to re-index or re-organize the information in your customer database. From the Home tab on the main menu, select Miscellaneous. Then select Re-Index Customer History. Follow the prompts. This process should take only a couple of minutes.

WHY CAN'T I DO A DAILY BACK-UP?

Your back-up drive is possibly defective. It is possible that your daily back-up pen drive has become full or damaged. Please delete any information on the pen drive that is not Auto Data related. After doing this, select Backup from the Cash tab on the main menu. If backup continues to fail, call Auto Data for further instructions.

Inventory FAQ

WHY CAN'T I ENTER A NEW PART IN THE PARTS CATEGORY?

You may need to first create a new service category. First go to the Services menu and verify that a service category exists for that particular part. A part category requires that you have an existing service in that same product code in the services section before you can create parts.

WHY CAN'T I SELECT YES TO "PRICED BY PARTS" IN THE SERVICES CATEGORY OF INVENTORY MANAGEMENT?

You must first verify that a parts category has been created in the Parts menu. Remember that all service categories must be in the same numbered category for the corresponding parts category. If the service is in service category 30 then the related parts must also be in parts category 30. To set Priced By Parts to Yes, Call Up Parts must first be set to Yes.