

**Total Control Software  
Corporation**

**Total Control Software What's  
New for October 2003**

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# Introduction

Total Control Software Corporation is pleased to announce that we are adding Adobe PDF format to our manuals. These manuals can be downloaded from our website and viewed and/or printed from your computer or on-line.

You can download free Adobe Acrobat Reader software from  
[www.adobe.com/acrobat](http://www.adobe.com/acrobat)

If you have any questions, please contact us at [support@tcsoft.com](mailto:support@tcsoft.com)  
or call us at 501-833-3281.

# Total Control Software What's New for October 2003

**Part**



# 1 What's New for October 2003

To All Our Customers:

The What's New for September pdf document will replace the What's New for March 2003. This file is included on your CD and will also be posted up on our website this week. All instructions that were included in the previous file have been incorporated and updated with this file.

This Program Update includes the following:

**We have added a POS Terminal to the program. See the Point-Of-Sale Terminal instructions for setting up individual workstations and how the new Terminal program works with the system.**

Other recent changes:

1. You can mark individual customers for label printing. Select Customers, then select Mark Customer for Mailing Labels.
2. We have added Date Purchased (for major unit sales) and Last Service Date to all queries and custom reports and spreadsheets.
3. You can create a custom Active Deals Report from Reports/User Designed Reports, set up your own fields, and filter/query the report.
4. You can generate a Trade-In Tracking Report from Reports that will give you the status of all trade-ins for a given date range, list who traded in the unit, and its current ACV.
5. The Floor Plan Report has been updated and corrected. You can always create and print a custom floor plan report and/or spreadsheet from Reports/User Designed Reports, and then select either Current Inventory, Sold Inventory, or All (In-Stock and Sold).
6. A batch job import for Mercury on-line price file downloads has been added to the TCS Price Book & Utilities. It will automatically read all weekly price files that have been imported into TCS and allow you to batch process all the weekly price files at once.

## **TCS Parts, Service & Inventory:**

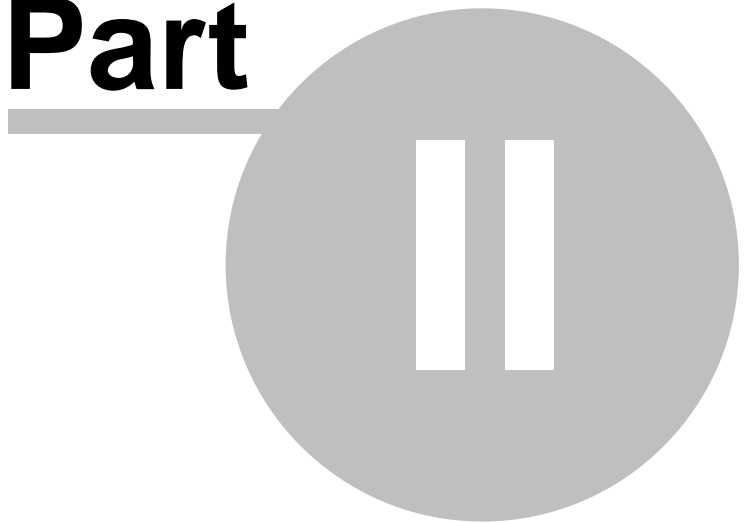
1. Added Prep/Rigging as a Work Order type option to the system. If you are using the Accounting Codes in the system you will need to go into each of your departments (File, Parts Department Codes) and add the appropriate accounting codes to this work order type.
2. Fixed Job Price option for Service Pick Lists (Canned Work Order Jobs) has been added.
3. You can select to Print Job Totals only as a default setting in your System Setup (Service) or Labor Totals only for all Work Orders. If you select to Print Job Totals only as your default setting you can override this setting at each individual job/problem of your work orders.
4. Set a Non-Taxable Labor for an individual work order by checking the Non-Tax Labor check box on that work order.
5. Internal Work Orders now have fields available for entering the Customer name after the Stock Number for the unit being purchased has been entered. This will help with rigging sheets as it prints the new customer's name on the Rigging Sheet as well as displaying the customer's name on the display screen for Active Work Orders.
6. Work Orders now have a Notes section than can be imported from the Customer's record (to include directions, etc.). The Notes can be further edited or modified for specific notes for a particular work order. The Notes record is specific to the work order and does not import back over to the customer record.
7. There are some changes to various reports, new fields added to custom reports and spreadsheets, and new fields added to the filter/query options for these reports.

## **TCS F&I:**

1. A Reverse Deal button has been added to the Sold Deals. This will return the deal to Active Deals and return the Sold Inventory Items to Current Inventory. You may still need to void any Sales Invoice you created.
2. Printing Current Inventory product specification sheets (window stickers) is now an available.
3. A NADA link has been added to the Trade screen in Active and Sold Deals. This is only a link to the NADA website and does not copy/paste information into the Trade.
4. Rebates for Customer Deals has been updated with Rebate Expense Account and Receivable Account setup included for each manufacturer that you have rebates.
5. If these Rebates are taxable items in your state you can select the rebate as a taxable item in the Deal Information tab of your deal.
6. Battery/Tire Fees (or taxes) can be selected as taxable.
7. Freight and/or Rigging can be selected as taxable or non-taxable items.
8. Active Deals now have included a Projected Delivery Date field (this field stays with the deal when converted to a Sold Deal). Custom reports can include this field and be filtered or sorted by the Projected Delivery Date.
9. If you are just setting up or correcting sales tax settings for your F&I, we recommend that you delete all the tax settings on the F&I System Setup Screen and use the Regional Sales Tax settings to set up each region (even if you only have one). The regional sales tax settings allow for different tax rates to be applied to different items (i.e., trailers are taxed at a different rate from the boat and motor, ATVs are taxed at a different rates from other items, etc.).
10. A second break point level for sales taxes in the F&I has been added to the Regional Sales Tax settings. If your state has two break points for calculating sales tax you can use these new fields.
11. A check box has been added for Canadian Dealers to allow for GST and PST tax rate entries.

# Total Control Software What's New for October 2003

## Part





## 2 Download and Install the Update from the Internet

In order for you to implement these new features on your Total Control Software program you will need to download and install the update posted (after 03/18/2002) on our website or install the update on your March 2002 CD. To make things a little easier, the What's New for December 2001 sections are also included in this document.

Please follow the update installation instructions completely.

**Always Back up your data before running this, or any other, update.**

To install your update to your system:

1. **Shut down and turn off all workstation computers**
2. Close all programs on your server
3. Connect to the internet using your default internet provider and navigator
4. Access our webpage for dealers at [TCS Update Page](#)  
([www.tcsoft.com/update/update.htm](http://www.tcsoft.com/update/update.htm))
5. Click on the Download Update
6. You will be prompted whether to Open or Save To Disk. Select SAVE TO DISK
7. Select the Desktop as the location to save this update and click save.
8. Once the download is complete, select Close and exit the Internet.
9. Double-click on the update icon on the desktop of your server and follow the prompts to install.
10. The default directory C:\WINBOAT will display. If you are installing the update to a dedicated server from a workstation, or the WINBOAT directory is located under another folder or drive, you will need to change and select the mapped drive letter to the server (and/or winboat directory).
11. Follow the prompts and when the installation is complete click on the Finish button.
12. The data conversion function will automatically run after the update installs. Please do not do anything until the **Processing and Converting Files** window closes.

# Total Control Software What's New for October 2003

## Part



## 3 Point-Of-Sale Terminal

TCS has added the option for a dedicated Point-of-Sale Terminal which can be set up at any workstation. This is a separate sub-program within the Parts & Service. Any workstation set up with the Point-of-Sale Terminal can still access the Parts & Service (for closing out work orders, looking up information, etc.)

After you have installed the Update, you will need to set up each workstation that will be using the Point-of-Sale Terminal.

Next:

### 3.1 Setting Up Your Point-of-Sale Workstation

To set up your Point-of-Sale Workstation:

1. Open Parts & Service at that computer terminal.
2. Select File, then System Setup.
3. Go to the Parts tab in the System Setup.

The screenshot shows the 'System Setup Form' with the 'Parts Dept' tab selected. The 'Fast Invoice' checkbox is checked. The 'Use POS Terminal For Point Of Sale' checkbox is also checked. The 'Default Make' field contains 'MERC'. The 'Cash Code' field contains 'CASH'. The 'Change Due Display Time (Seconds)' is set to 4. The 'Copies' field is set to 2. Other options include 'Do Not Preview POS Invoice', 'Apply Mark-Up From List', 'Charge Cost Only On Internal', and 'Force Dept Code On All Sales'. The 'Save', 'Cancel', and 'Help' buttons are visible at the bottom.

4. Check the Use POS Terminal for Point Of Sale check box.
5. Set the number of seconds for the Change Due to Display (the default setting is 10 seconds).

**System Setup Form**

General | FI Settings | **Parts Dept** | Service Dept | Other Info | User Fields | Accounting

Fast Invoice       Use POS Terminal For Point Of Sale

Default Make:

Sales Code:

Cash Code:

Min Parts Sale:

Invoice Printer:  ...      Copies:

Work Order Printer:  ...

Change Due Display Time (Seconds):        Do Not Preview POS Invoice

Parts Markup to Service Dept:        Apply Mark-Up From List

Parts Markup Warranty:

Parts Markup Internal:        Charge Cost Only On Internal

Tax Shipping       Force Dept Code On All Sales

6. If you do not want to preview invoices, check this box. This will send the invoices directly to the default printer for this workstation.
7. If this is a multi-register setup, make sure that you also set the register number. Go to Other Info, and enter the Register number for this workstation.

**System Setup Form**

General | FI Settings | Parts Dept | Service Dept | **Other Info** | User Fields | Accounting

Day Of Month To Compute Late Fees: 1  Roll Payments Into Invoice Balances

Last Computation Date: 8/31/03

Annual Interest Rate: 12.0000 Late Fee GL Accl: 1100

Cash Drawer Com Port (This Machine): COM1

Program Serial Number: TCS91741477637907

40 Col Receipt Printer:  ...

Receipt Printer Port:

Date of Next Inventory Update: 10/01/03

This Computer Has NT/Win 2000 Installed:

Cash Drawer/Register No For This Terminal: 5

Force Make Lookup (Packaged Motors & Trailers):

Force Model Lookup:

## 3.2 The POS Terminal

After you have set up the individual workstations that will be using the POS Terminal program, open Parts & Service at that workstation. The POS Terminal is initiated from the Parts & Service Main Menu by selecting Quick POS.

You will be prompted for the Sales Code. Enter the Sales Code and press the OK button.

The POS Terminal screen stays up on the workstation at all times and is always ready for a new invoice. Invoice numbers are not generated until the sale is completed.

The functions you have been used to with the Quick POS are essentially the same, however, the new POS Terminal allows for easier entry, check out, printing, and immediately being able to begin another ticket.

The Main POS Terminal screen is shown below:

Customer [F3] CASH Sale Type RS Date 9/19/03  
 Cash Customer Sales Code VGR Cash Drawer/Register No 5  
 Tax Exempt  
 Cust PO No

Enter Item Number Or Qty

No	Make	Part No	Description	Dept	Qty	Price	Total

Bin Stock Information On Hand On Order  
 -25 1

\$ Cash Out [F2 Key]

Sub Total 0.00  
 Sales Tax 0.00  
**Total Due 0.00**

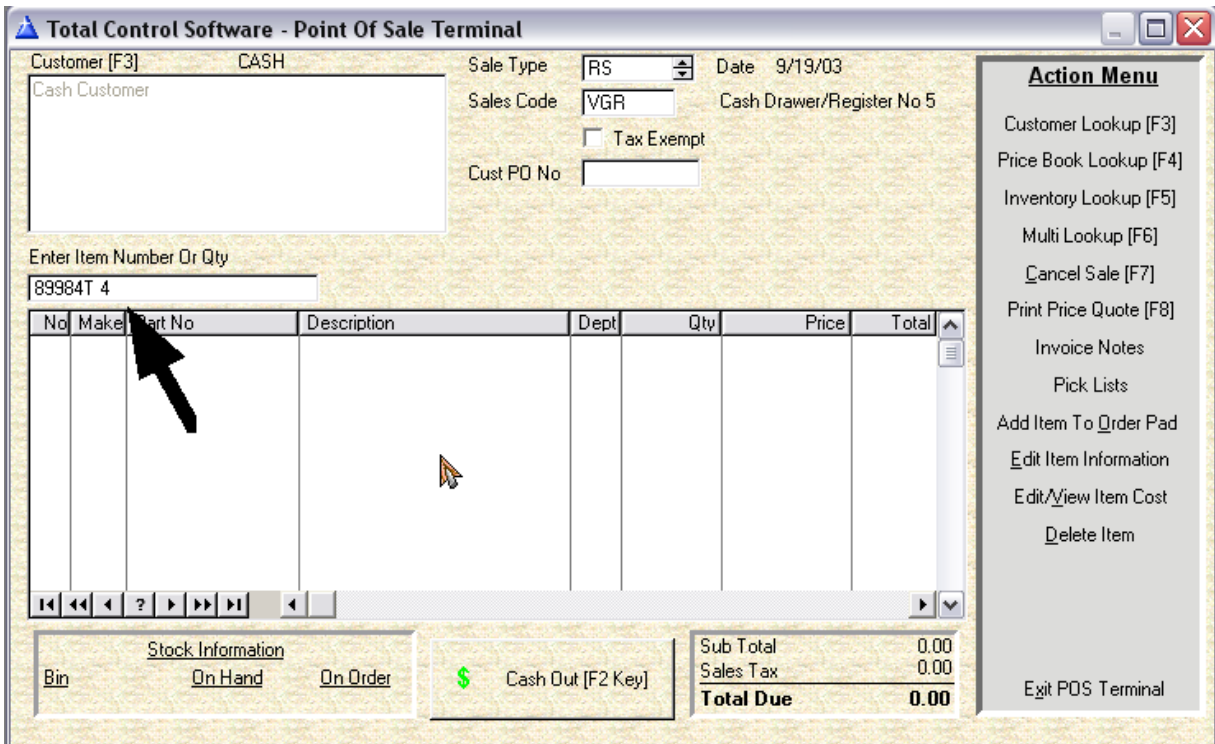
**Action Menu**  
 Customer Lookup [F3]  
 Price Book Lookup [F4]  
 Inventory Lookup [F5]  
 Multi Lookup [F6]  
 Cancel Sale [F7]  
 Print Price Quote [F8]  
 Invoice Notes  
 Pick Lists  
 Add Item To Order Pad  
 Edit Item Information  
 Edit/View Item Cost  
 Delete Item  
 Exit POS Terminal

All options are available on-screen at all times. Using the F keys from the Action Menu will initiate the action, or use the Alt + the underlined letter in the Action Menu item (i.e., to add an item to the order pad use Alt + O).

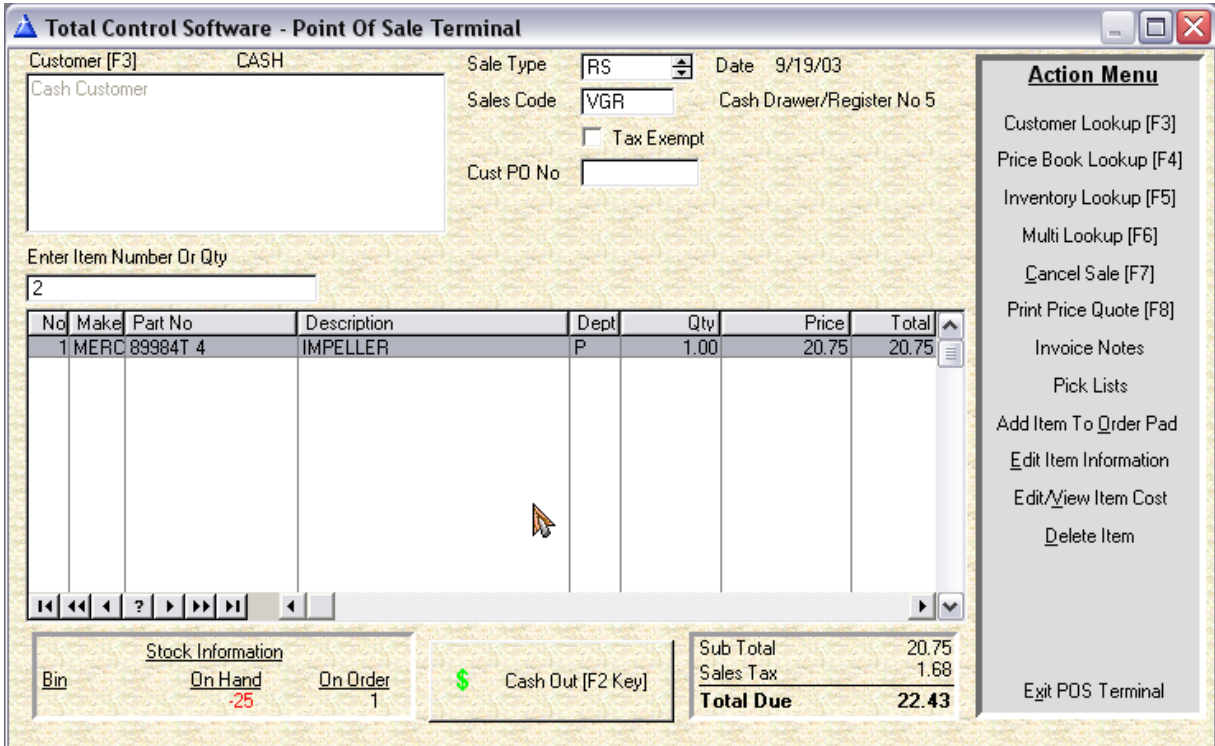
### 3.3 Entering Part Numbers and Quantities

The Point Of Sale Terminal is always "up" on screen at the workstation. All items and quantities are entered or scanned in the **Enter Item Number or Qty** field box. Quantities are entered as 1 through 99, with a quantity of 1 being the default.

Enter the Part number (or scan it using a bar code scanner) and press the Tab key on your keyboard.



Enter the quantity (1 through 99) and press the Tab key on your keyboard.



After you have enter several parts, you can move through the various items by using the Up and Down Cursor Keys on your keyboard. With the part highlighted you can adjust quantity by simply entering a number between 1 and 99 and pressing the Tab key on your keyboard. For other

options, see below.

As each item is entered, Stock Information for that item is displayed in the lower left corner of your screen, with the Bin Location (if any), On Hand Quantity, and any On Order information. The subtotal, tax due, and Total Due is displayed on the lower right corner of the screen and changes as parts are added, removed, etc.

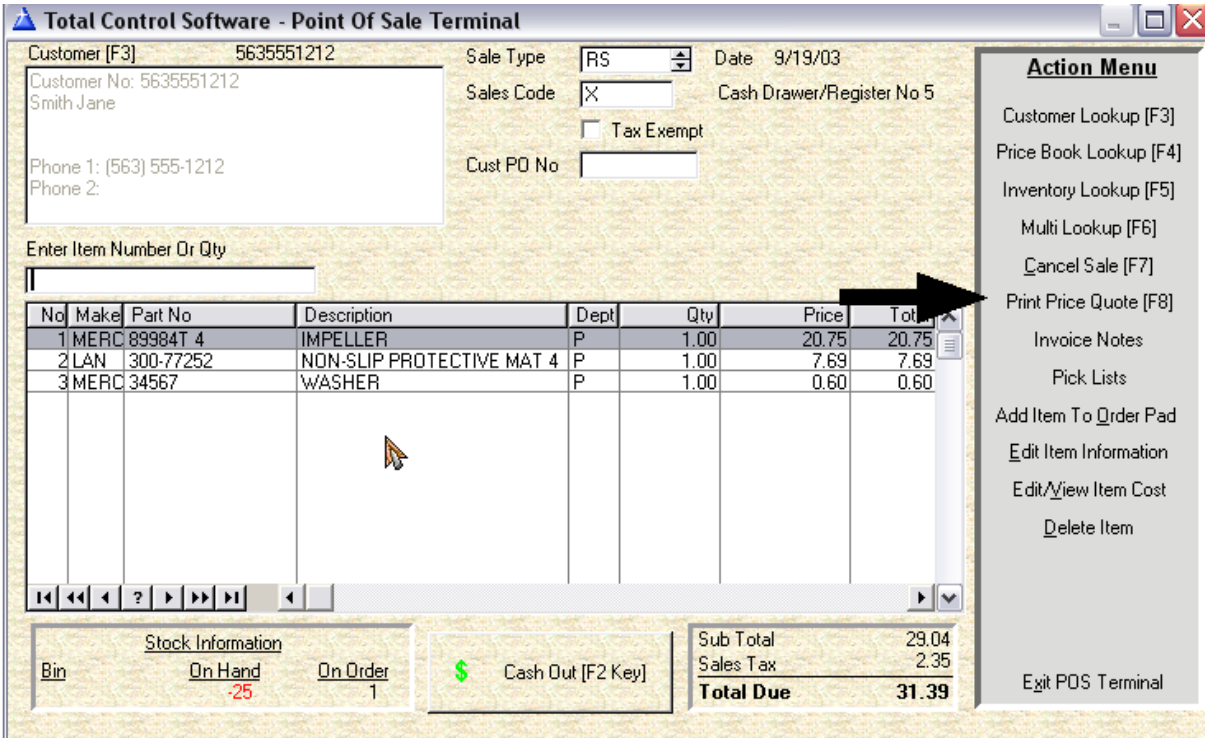
### 3.4 Customer Lookup

The default setting for all POS Terminal sales is Cash Customer. If you are doing a sale for a Customer in the database, you can look the customer up using the F3 key on your keyboard.

Cust No	Last Name	First Name	Address	City
5012582163	Beal	Brian	1304 West 41st Street	North Little Rock
563555121	Brown	Linda	111 Main Street	Anytown
CASH	Cash Customer			
INT	Internal Sale			
7035551212	Kovac	Andrew M.	13432 Broken Branch Co	Chantilly
5015551212	Last Chance Resellers			
5018333281	Rollins	Val	12010 Watson Road	North Little Rock
SHOP	SHOP			
5635551212	Smith	Jane		
5013450032	Williams	Leon		

The Standard Locate a Customer Record screen will display. Find your customer, highlight him/her and press the Select button.





If the customer has been set for any discounts or special tax rates, the POS Terminal screen will handle these items automatically.

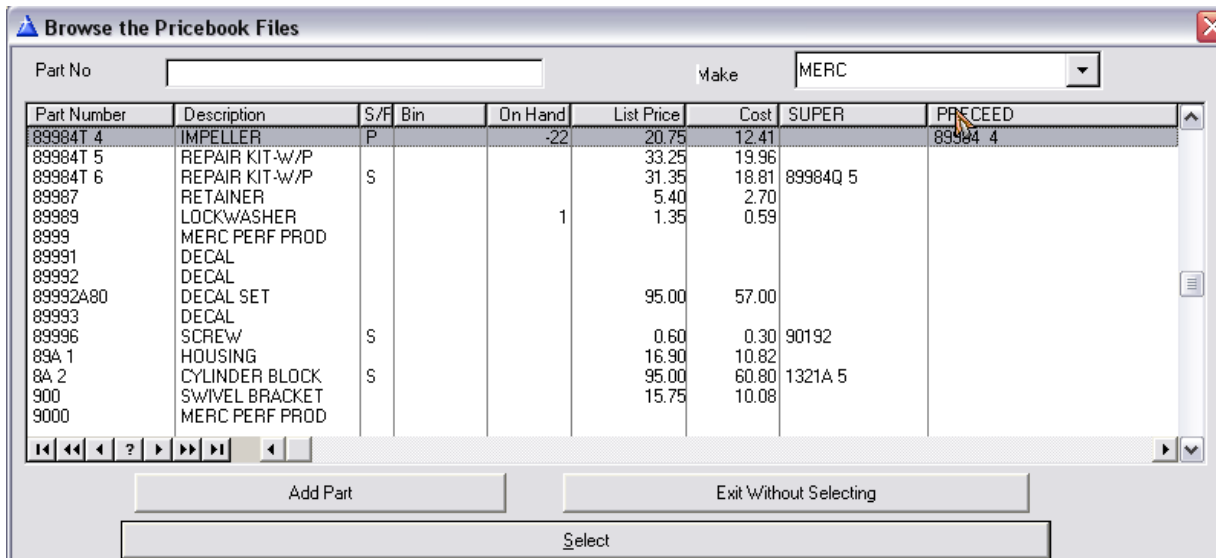
As before, you can always discount an individual part by highlighting it and use the Alt + F keys at the bottom of the screen for discounting, marking up, or returning an item to retail.

### 3.5 Price Book and Inventory Lookup

You can look up parts using the Price Book Lookup or the Inventory Lookup.

#### Price Book Lookup

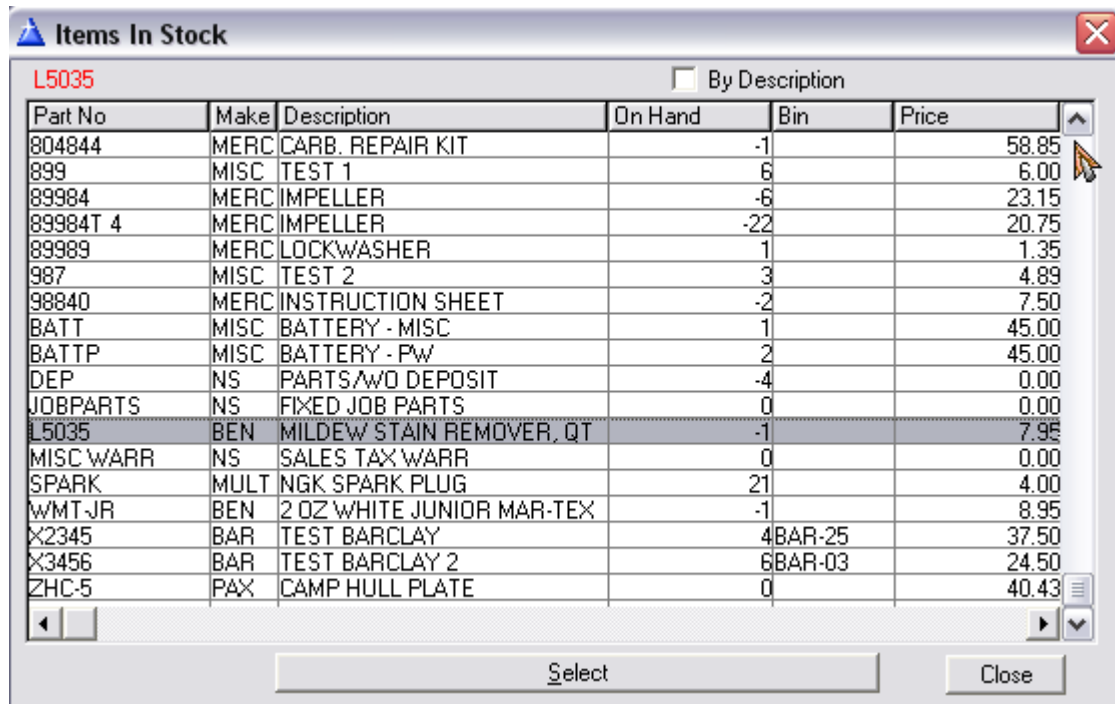
The Price Book Lookup (F4 key, or select by clicking your mouse on the Price Book Lookup in the Action Menu) brings up the standard Price Book screen, sorted by Make.



The Inventory Lookup (F5 key, or select by clicking your mouse on the Inventory Lookup in the Action Menu) allows for more specific search parameters.

### Inventory Look Up By Part Number

Just begin entering the part number you are looking up. It will display in red on-screen and the screen will scroll down until it matches or finds the closest match to the part number entered.



### Inventory Look Up By Description

To look up parts by description, check the By Description check box. Begin entering the description of the part you are searching for. It will display in red as you type it in and the screen will scroll to

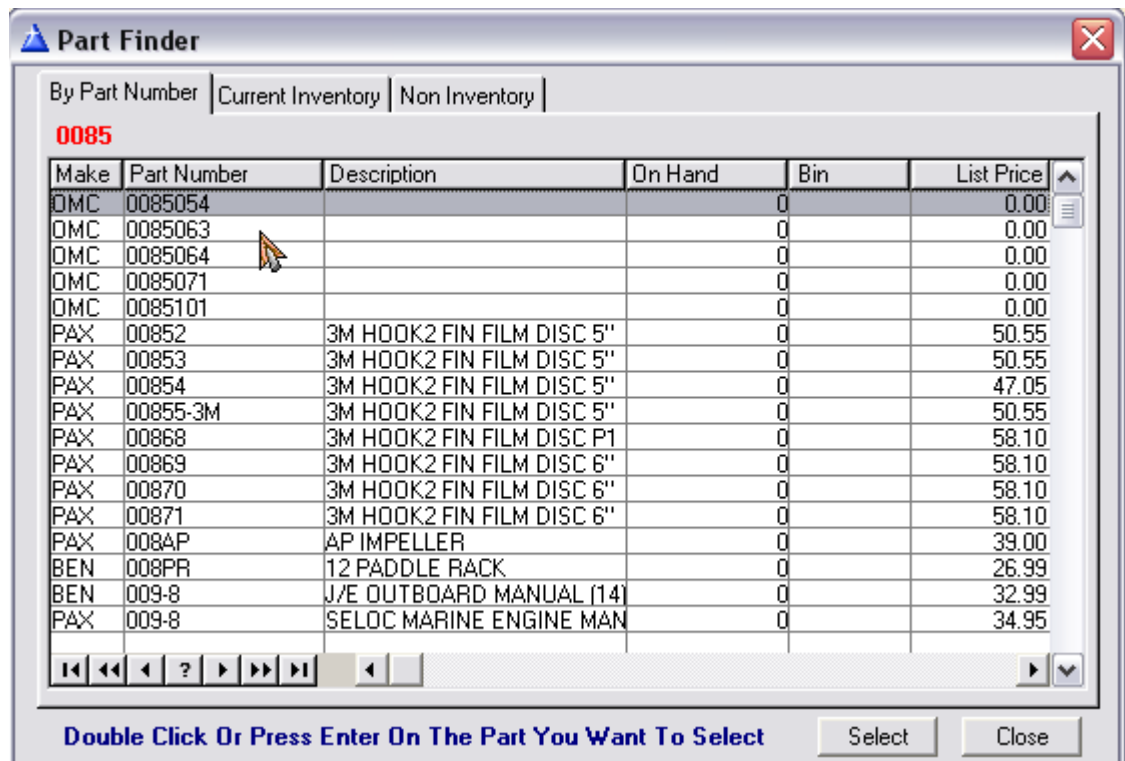
the part matching that description.

Part No	Make	Description	On Hand	Bin	Price
4323	MERC	CARBURETOR	-3		19.70
47-5205	LAN	CONDENSER-OMC 581419		3BAR-06	3.62
016-F3170-01-00	YAM	CYLINDER,FRNT FORK	0		52.56
802884Q	MERC	FILTER-OIL	-2		5.80
JOBPARTS	NS	FIXED JOB PARTS	0		0.00
47-8051	LAN	FUEL HOSE TWIN LINE 50 FT	1		1.58
47-8025	LAN	FUEL LINE ASSY. J1527 ME	2		29.43
3858261	VOL	FUEL PUMP	-1		179.00
2234	MERC	FUEL TANK	-3		33.50
00011000	MERC	GIMBAL HSG ASSY	0		1,383.40
00013340	MERC	GIMBAL HSG ASSY	0		4,037.60
78860	MERC	GUIDE	-10		1.40
78999A 1	MERC	HARNESS ASSY	-1		24.20
89984	MERC	IMPELLER	-6		23.15
89984T 4	MERC	IMPELLER	-22		20.75
98840	MERC	INSTRUCTION SHEET	-2		7.50
89989	MERC	LOCKWASHER	1		1.35
573553	LU	LUND SILVER/WINE 99	4		21.54

### 3.6 Multi Lookup

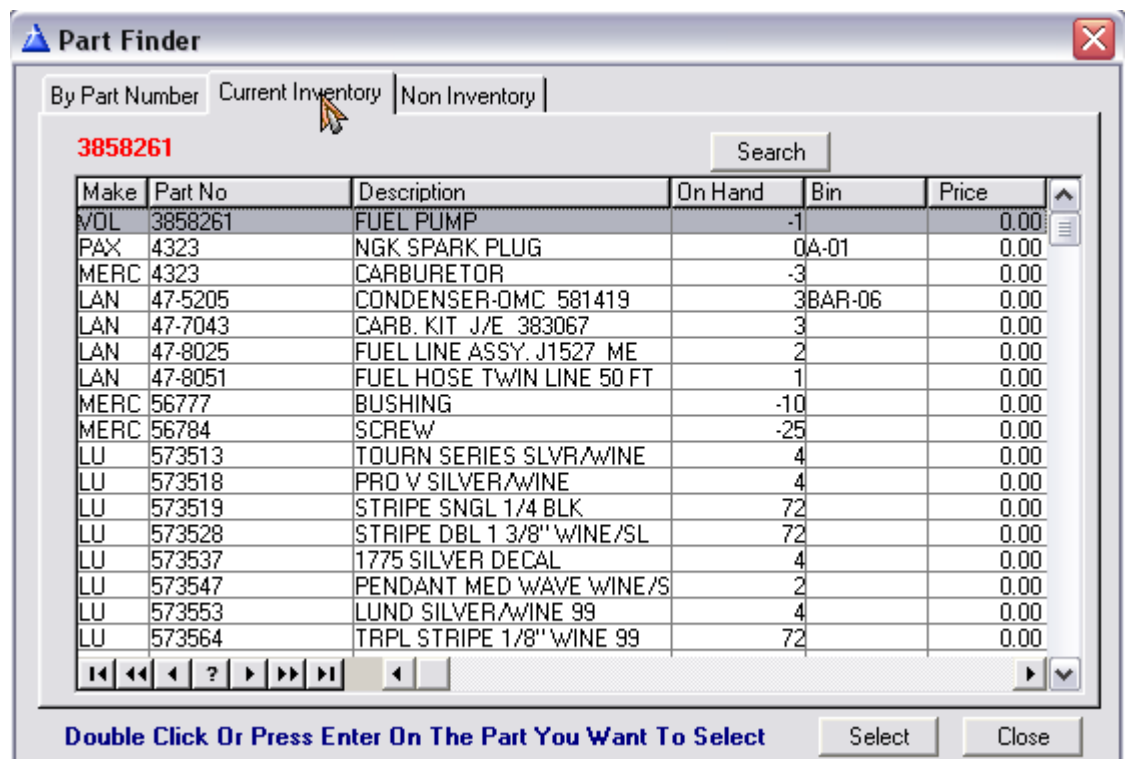
The Multi Lookup Function allows for multiple searches within the same screen (F6 key, or click your mouse on the Multi Lookup in the Action Menu).

You can search by Part Number, Current Inventory or Non-Inventory.

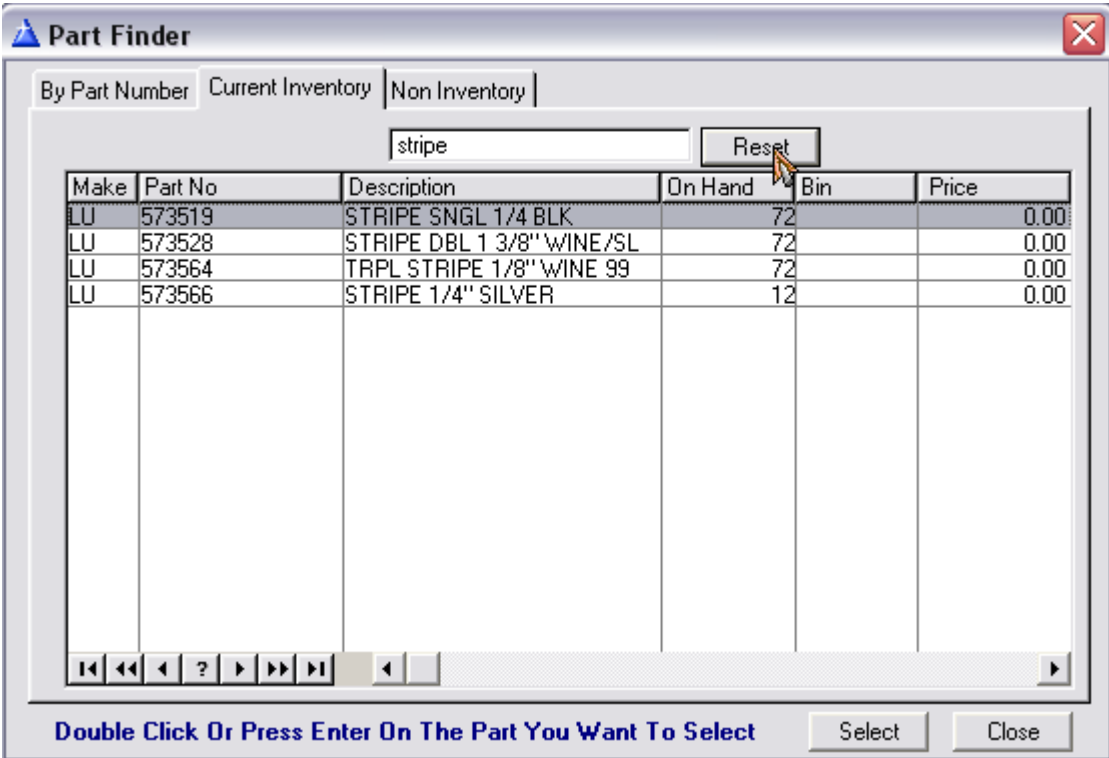


For Current Inventory lookup in the Multi Lookup screen, click on the Current Inventory tab.

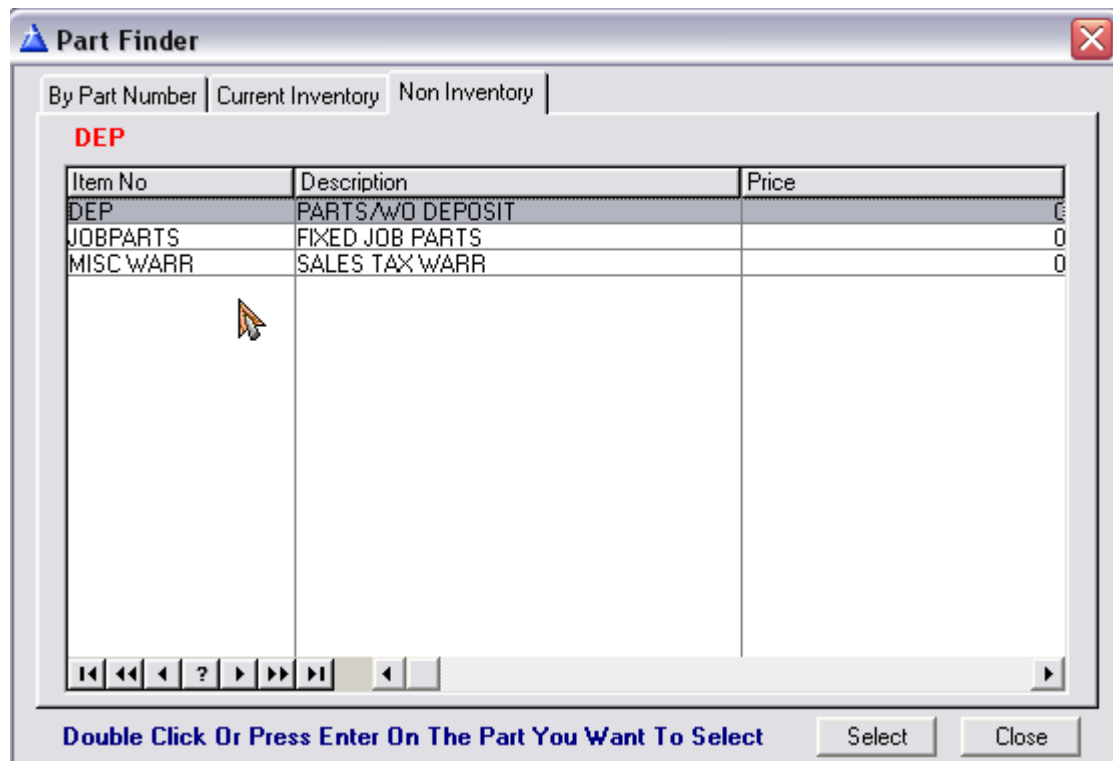
Entering the Part Number will scroll to the nearest match.



Selecting the Search button, opens the Search Field. Entering a partial description will return all parts with that keywor(s) in the description. Use the Reset button to return the Current Inventory screen to full display.



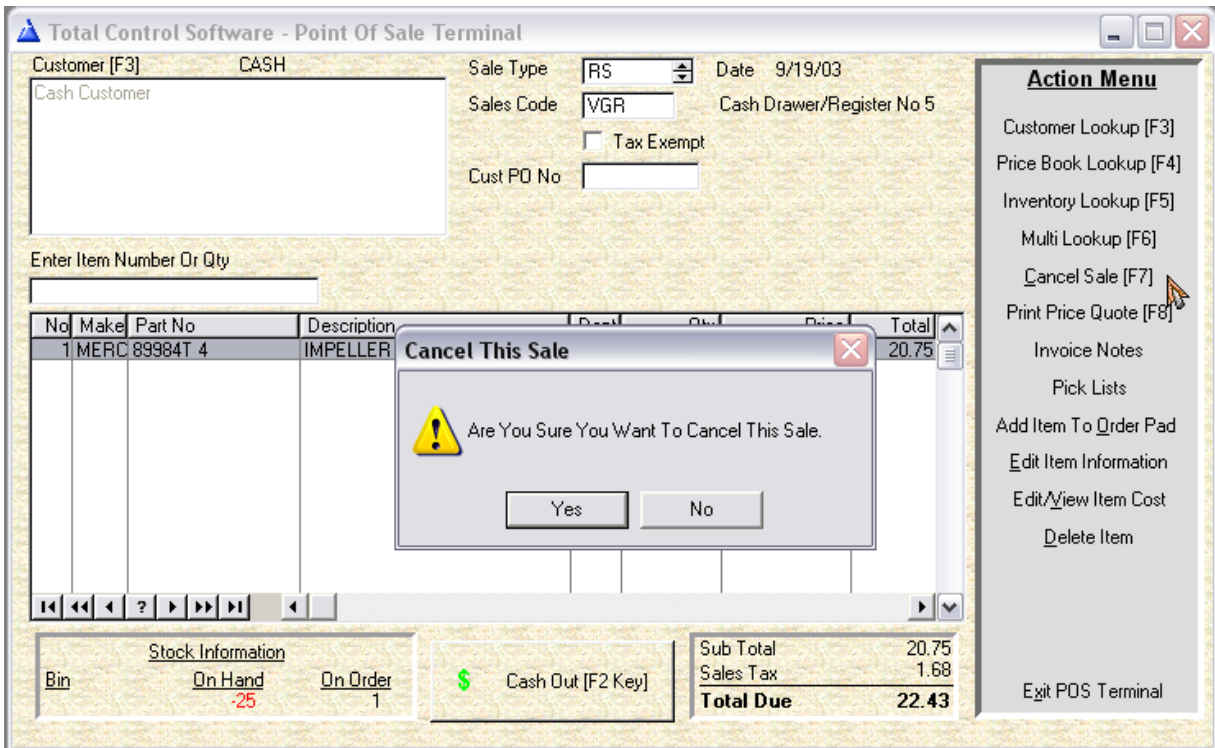
The Non-Inventory Tab allows you to lookup non-inventory items by entering the item number.



### 3.7 Cancel Sale

A sale can be cancelled in two places, at the main POS Terminal, which will return the POS Terminal screen to an empty screen allowing you to start the next sale, or from the Cash Out (Invoice Payment Form).

**Canceling a Sale from the POS Terminal screen:**



Selecting No will return you to the screen with all information intact. Selecting Yes will return you to an empty screen, ready for the next sale.

### 3.8 Print Price Quote

You can Print a Price Quote based on a pending sale in the POS Terminal at any time (F8 key, or selecting Print Price Quote on the Action Menu).

**Total Control Software - Point Of Sale Terminal**

Customer [F3] 5635551212      Sale Type RS      Date 9/19/03  
 Customer No: 5635551212      Sales Code X      Cash Drawer/Register No 5  
 Smith Jane       Tax Exempt  
 Phone 1: (563) 555-1212      Cust PO No   
 Phone 2:

Enter Item Number Or Qty

No	Make	Part No	Description	Dept	Qty	Price	Total
1	MERC	89984T 4	IMPELLER	P	1.00	20.75	20.75
2	LAN	300-77252	NON-SLIP PROTECTIVE MAT 4	P	1.00	7.69	7.69
3	MERC	34567	WASHER	P	1.00	0.60	0.60

Navigation: [Left Arrow] [Right Arrow] [Home] [End] [F1] [F2] [F3] [F4] [F5] [F6] [F7] [F8] [F9] [F10] [F11] [F12] [Print] [Exit]

Stock Information			Sub Total	
Bin	On Hand	On Order		
	-25	1	\$ Cash Out [F2 Key]	29.04
				Sales Tax 2.35
			<b>Total Due</b>	<b>31.39</b>

**Action Menu**

- Customer Lookup [F3]
- Price Book Lookup [F4]
- Inventory Lookup [F5]
- Multi Lookup [F6]
- Cancel Sale [F7]
- Print Price Quote [F8]
- Invoice Notes
- Pick Lists
- Add Item To Order Pad
- Edit Item Information
- Edit/View Item Cost
- Delete Item
- Exit POS Terminal

You will be prompted to Preview or Not (this is an override from the Standard POS Terminal Cash Out).

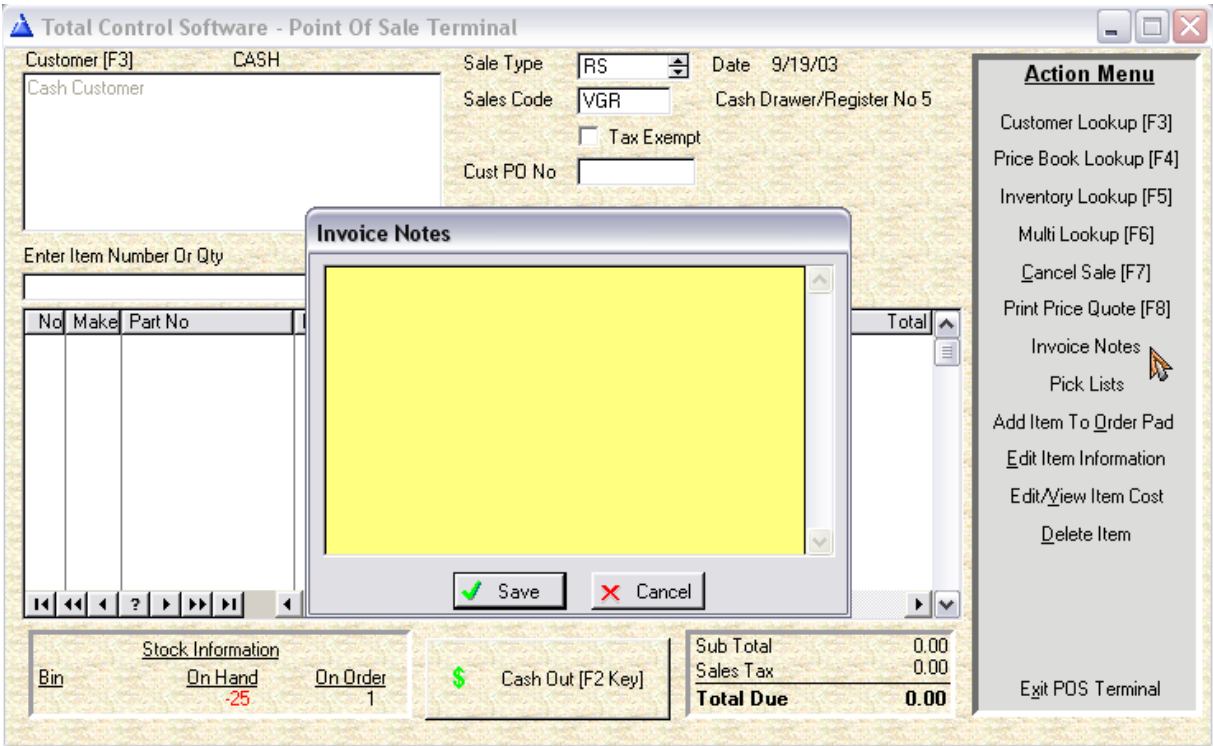
Parts Price Quote

Make	Part No	Description	Qty	Price	Extended	Bin	On Hand
MERC	89984T 4	IMPELLER	3	20.75	62.25		-22
BEN	L5035	MILDEW STAIN REMOVER,	1	7.95	7.95		-1
Sub Total					70.00		
Taxes					5.69		
Total					75.69		

### 3.9 Invoice Notes

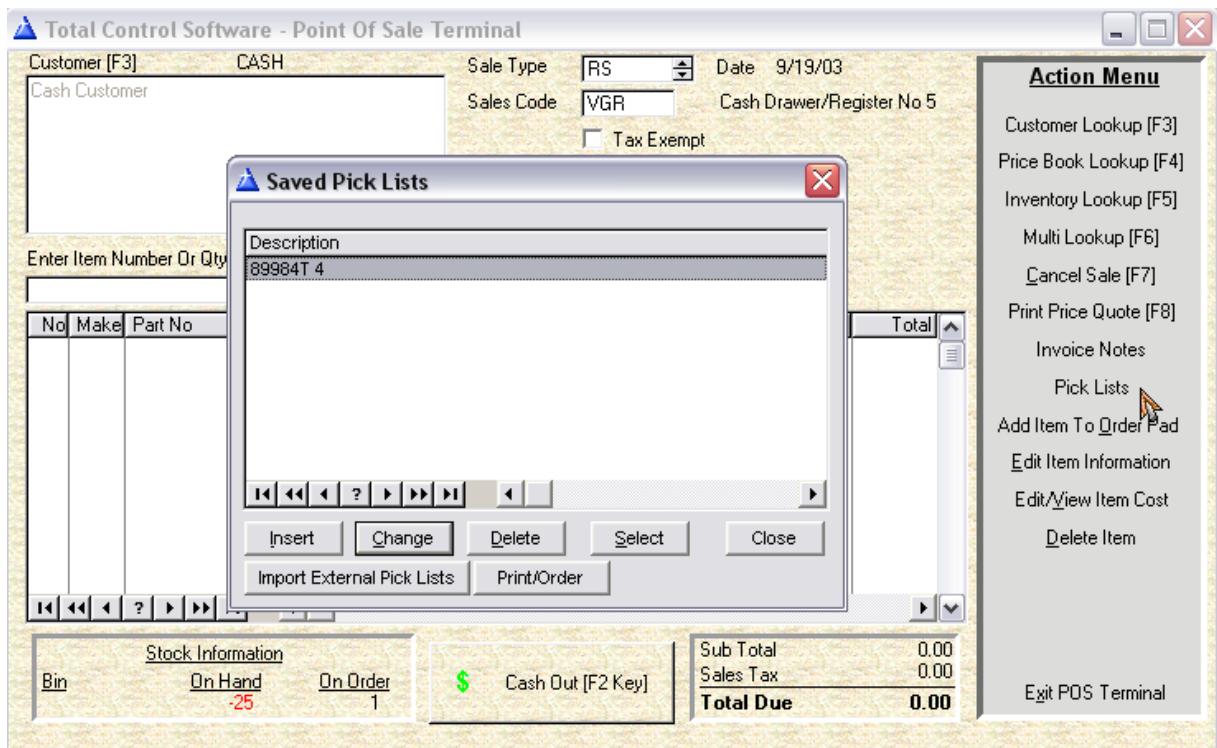
Invoice Notes can be added to any ticket by selecting Invoice Notes from the Action Menu, entering your notations and clicking the Save button.





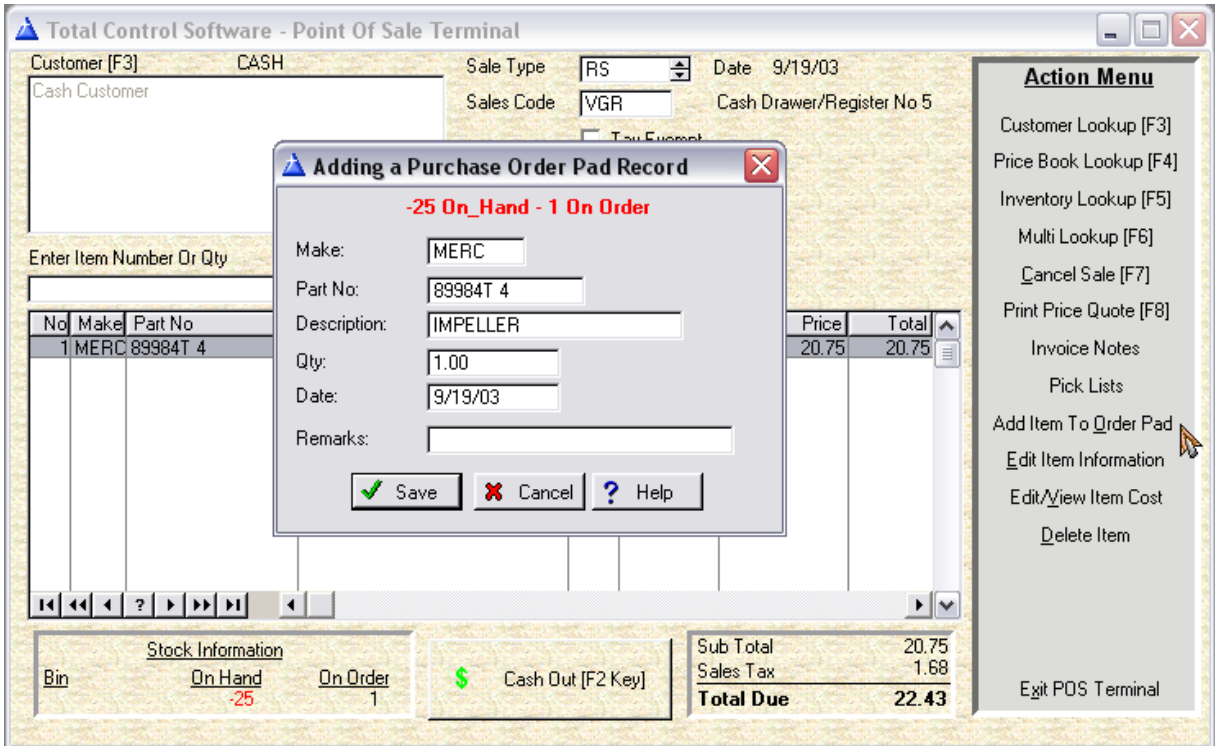
### 3.10 Pick Lists

Inserting a Pick List to a ticket is the same as the Quick POS. Select Pick Lists from the Action Menu, then choose from the Saved Pick Lists or use the Import External Pick Lists option.



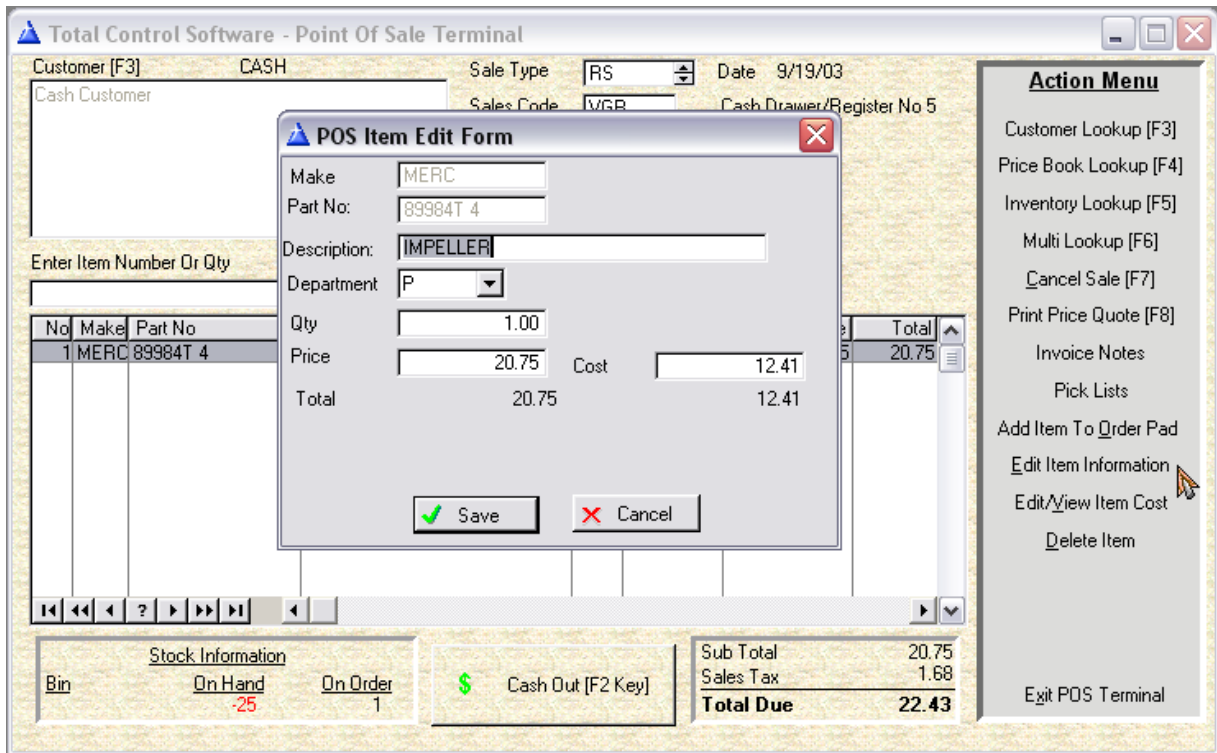
### 3.11 Add Item to Order Pad

Adding an item to your Purchase Order Pad is the same as in the old Quick POS. Highlight the item to be ordered (status displays in the lower left hand corner of your screen) by using the up and down cursor keys on your keyboard. Select Add Item to Order Pad, enter the quantity and any remarks and click the Save button.



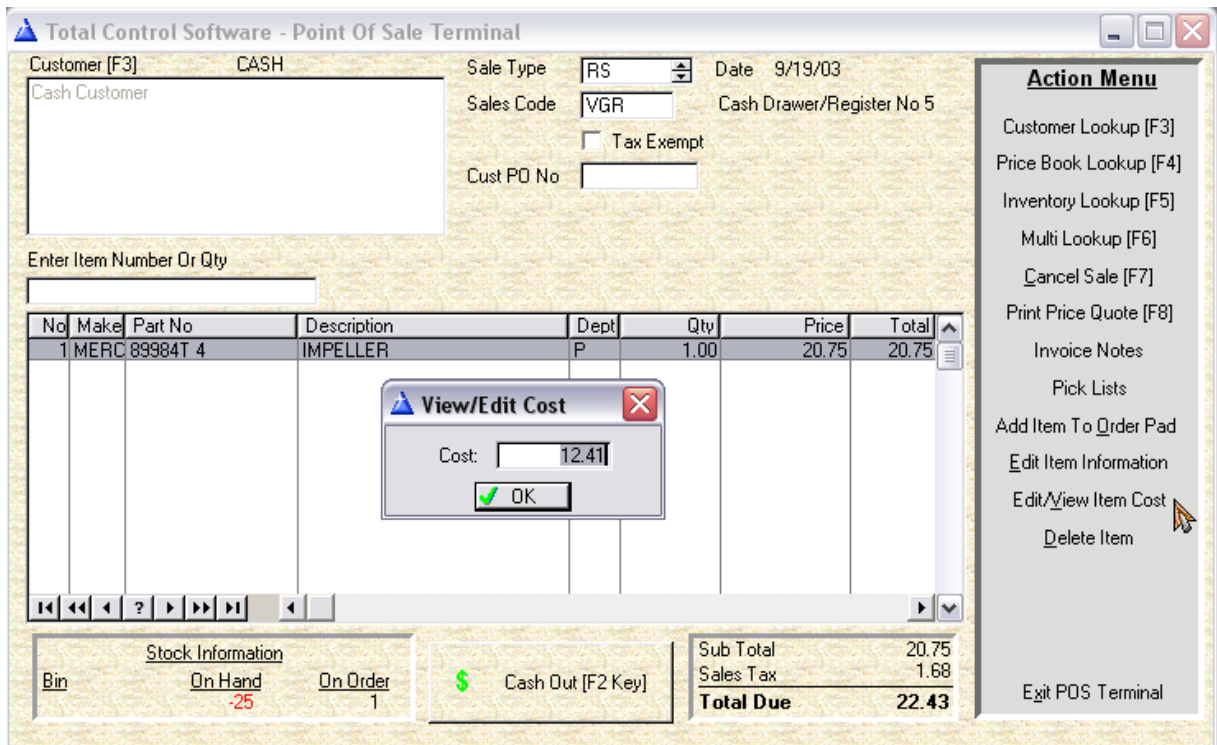
### 3.12 Edit Item Information

You can edit information for an item on the POS Terminal. Highlight the item using the up and down cursor keys on your keyboard, select Edit Item Information. Make any corrections and click the Save button.



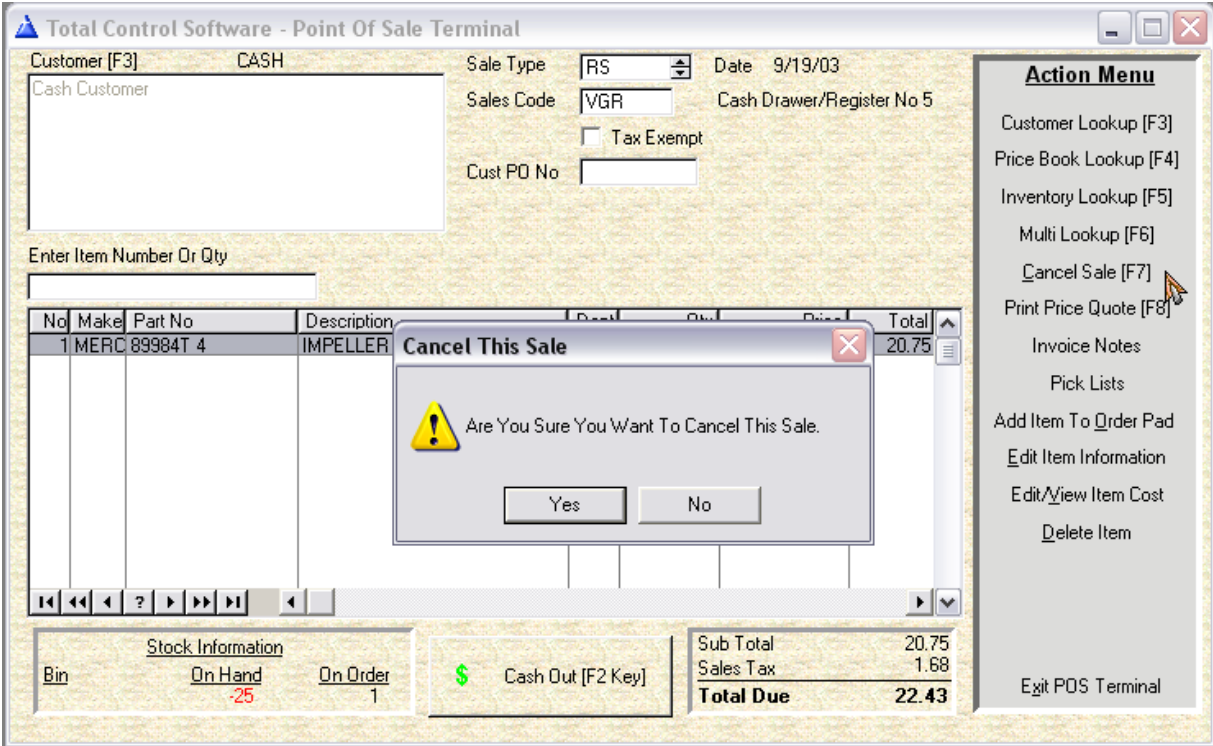
### 3.13 Edit/View Item Cost

This is generally used for non-inventory items or XXX parts. Highlight the item using the up and down cursor keys on your keyboard and select Edit/View Item Cost.



### 3.14 Canceling A Sale

Canceling a sale from the POS Terminal screen will delete all items from the screen and allow you to start over again.



Canceling a sale from the Cash Out (F2) screen returns you to the Sale with all items still on screen.

Total Control Software - Point Of Sale Terminal

Customer [F3] CASH Sale Type RS Date 9/19/03  
 Cash Customer Sales Code VGR Cash Drawer/Register No 5

**Invoice Payment Form**

Invoice Grand Total 22.43  
 Warranty Paid  
 Internal Paid 0.00  
 Amount Received 22.43  
 Payment Method CASH  
 Balance Due **0.00**

Save + Print [F2 Key] Cancel

Enter Item Number Or Qty

No	Make	Part No	Qty	Price	Total
1	MERC	89984T 4		20.75	20.75

Bin Stock Information On Hand On Order  
 -25 1

Cash Out [F2 Key]

Sub Total 20.75  
 Sales Tax 1.68  
**Total Due 22.43**

**Action Menu**

- Customer Lookup [F3]
- Price Book Lookup [F4]
- Inventory Lookup [F5]
- Multi Lookup [F6]
- Cancel Sale [F7]
- Print Price Quote [F8]
- Invoice Notes
- Pick Lists
- Add Item To Order Pad
- Edit Item Information
- Edit/View Item Cost
- Delete Item
- Exit POS Terminal

You will be prompted whether to continue to cancel the sale (returning you to a blank POS Terminal screen) or by selecting No, leaving all items on screen (so that you can edit, add, delete individual items and then Cash Out).

Total Control Software - Point Of Sale Terminal

Customer [F3] CASH Sale Type RS Date 9/19/03  
 Cash Customer Sales Code VGR Cash Drawer/Register No 5  
 Tax Exempt  
 Cust PO No

Enter Item Number Or Qty

**Cancel Sale**

Are You Sure You Want To Cancel This Sale?

Yes No

No	Make	Part No	Description	Qty	Price	Total
1	MERC	89984T 4	IMPELLER		20.75	20.75

Bin Stock Information On Hand On Order  
 -25 1

Cash Out [F2 Key]

Sub Total 20.75  
 Sales Tax 1.68  
**Total Due 22.43**

**Action Menu**

- Customer Lookup [F3]
- Price Book Lookup [F4]
- Inventory Lookup [F5]
- Multi Lookup [F6]
- Cancel Sale [F7]
- Print Price Quote [F8]
- Invoice Notes
- Pick Lists
- Add Item To Order Pad
- Edit Item Information
- Edit/View Item Cost
- Delete Item
- Exit POS Terminal

# Total Control Software What's New for October 2003

**Part**



## 4 TCS F&I Module

### 4.1 Regional Sales Taxes

#### Regional Sales Tax

You should use the Regional Sales Tax settings for your dealership, even if you have only one tax base. The regional settings allow for multiple item tracking, setting up additional items and/or fees and allowing for them to be taxed or not as your state requires.

If your dealership is required to charge and/or collect sales tax for a number of counties, cities, or other tax localities, and the tax rates are different for each, you will need to set up the tax information for each. After you have set the default sales tax settings for your dealership location, select the **Regional Sales Taxes** button from the **F&I Settings** of the **System Setup Form**. Sales Tax and individual taxable items can be overridden in any **Active Deal** by un-checking the Calculate Tax check box in the Active Deal and entering the tax (or no tax) manually.

Enter the Default County/City/Region in the **Default County or Region For Sales Tax** field. This will be the tax rate that displays whenever an **Active Deal** for a customer major unit purchase is started. Selecting the Edit button to the right of the **Sales Tax** amount on the **Deal Information** screen of an **Active Deal** will display all your **Regional Sales Taxes**, highlight the correct region and press the **Select** button to change the tax base.

From the F&I, select File, then System Setup, then the F&I Settings tab.

The screenshot shows the 'System Setup Form' window with the 'F&I Settings' tab selected. The window contains various input fields and checkboxes for configuring dealership settings. At the bottom of the window, there are three buttons: 'Save', 'Cancel', and 'Help'. The 'Regional Sales Taxes' button is highlighted with a mouse cursor.

Field	Value	Field	Value
Credit Life Type	NONE	<input type="checkbox"/> Sales Tax Charged On Used Units	
A H Type	NONE	<input type="checkbox"/> Deduct Trade In Amount Before Taxing	
Filing Fees		Base Tax Rate	
Default Interest Rate	8.000	Tax Break Point	
Default Loan Years	10.00	Rate After Break Point	
A + H Commission Percent		Maximum Sales Tax	
Credit Life Commission Percent		<input type="checkbox"/> Track Trailer Tax Separately	
Accessories Mark Up Average		<input type="checkbox"/> Deduct Trade In Trailer	
Special Sales Tax Rate		<input type="checkbox"/> Sales Tax Charged On Service Contracts	
Title/Registration Fee		Property Tax Rate:	
Default Region For Sales Tax	AR	Battery Tax Rate (Each)	
<input type="checkbox"/> Canadian Version		First Payment Days	30
Default Credit Life Co		Default Sales Tax State	
Regional Sales Taxes		City/County Taxes	
		Document and Other Fees	

Select the **Regional Sales Taxes** button.



Select **Insert**, and enter the county, city, or other locale under County, then enter the tax rates, and select **OK**. Continue to add additional tax locales, then select the **Close** button on the **Regional Sales Taxes** screen.

Enter the General information for the regional tax, enter the tax as a decimal (i.e., 2% would be entered as 0.0200), any break points (as a dollar amount), upper rates (as a decimal), minimum tax (as a dollar amount), maximum tax (as a dollar amount). If Options/Accessories are taxed at a different percentage than the unit, enter it as a decimal. Check whether the trade is deducted before taxing, and whether Sales Tax is charged on used unit purchases.

If your Trailers are taxed and reported separately see the section on Trailer Sales Tax.

If Rigging and Freight are not taxed, check those boxes.

**Record Will Be Changed**


General Fees	Unit Type 1	Unit Type 2	Unit Type 3	Unit Type 4	Unit Type 5
Registration Fee		50.00			
Trailer Registration		25.00			
Document Fee		200.00			
		<input checked="" type="checkbox"/> Tax Doc Fees			
		<input checked="" type="checkbox"/> Tax Service Contracts			
Property Tax Rate		.0023400			
Prop Tax GL Acct					
Battery Fee/Tax Rate (Each)		3.00000			
Battery Tax GL Acct					
		<input type="checkbox"/> Tax Battery Fee			
Default Tire Fee		1.50			
		<input type="checkbox"/> Tax Tire Fee			

/ Save    X Cancel

Under the **Fees** tab enter the Registration, Trailer Registration, and Document Fee allowed or charged for this county/city/region/province. If document fees are taxable, check the box. If Service Contracts are taxable, check the box.

The **Property Tax Rate** was specifically set up for dealerships in Texas that are charging a Dealer Inventory Tax which is listed and charged on major unit purchases. If your state or region also imposes a similar tax you may enter it here. Enter this tax as a decimal and any corresponding **General Ledger Accounting Codes**.

The **Battery Tax** was also specifically set up for dealerships in Texas (other states may be charging this tax also) and is again, listed and charged on major unit purchases. If your state or region also imposes a similar tax you may enter it here. Enter this tax as a decimal (the **Active Deal** for the customer purchase will ask for the number of batteries), and any corresponding **General Ledger Accounting Codes**. If you are a Florida dealer, these items are considered taxable if you charge them. Check the tax boxes.

**Record Will Be Changed** 

General | Fees | Unit Type 1 | Unit Type 2 | Unit Type 3 | Unit Type 4 | Unit Type 5 |

Product Type: TRAILER  Non Taxable

Base Rate: 0.04000 Base Rate 2:

Break Point:  Break Point 2:

Rate Above:

Minimum Tax:

Maximum Tax:

If the taxes are different for different Unit Types for this region, you will need to set the tax rate for each (i.e., Boats with motors attached are taxed at 2%, but trailers are taxed at 3%). The base rate has already been set up at 2%. Only unit types set up separately under each of the 5 available unit types for each regional setting will be taxed at a different rate from the one set up in the general settings. Select the **Unit Type 1** tab and enter the Product Type (this must match the Product Type set up under **Lists, Product Lines**).

Enter the tax rates as described above. If this is a non-taxable item, or your dealership is not required to collect or charge the tax for this item, check the **Non Taxable** box.

After entering the tax rates for each Unit Type (Product Line), press the OK button to return to the **State/Regional Sales Taxes** screen. Continue inserting your regions and their individual settings, then press the **Close** button.

### City/County Sales Tax:

If your dealership is required to collect a separate City/County/Provincial Sales Tax, that needs to be reported and/or printed on forms separately, from **File**, then **System Set Up**, then the **F&I Settings** tab, select the **City/County Tax** button. Generally, the Regional Sales Tax settings will take care of most regions.

If your dealership collects a total tax (with no breakdown reported on contracts, forms, or invoices), paid to the same government entity, you should use the Base Tax Rate settings (either for Single Tax or Regional Tax) with any maximums and break points entered.

General | FI Settings | Parts Dept | Service Dept | Other Info | User Fields | Accounting |

Credit Life Type   Sales Tax Charged On Used Units  
 A + H Type   Deduct Trade In Amount Before Taxing  
 Filing Fees  Base Tax Rate   
 Default In   
 Default L   
 A + H Cor     
 Credit Life     
 Accessori   
 Special S   
 Title/Registration Fee   
 Default Region For Sales Tax  Battery Tax Rate (Each)   
 First Payment Days   
 Canadian Version Default Sales Tax State   
 Default Credit Life Co   
 Regional Sales Taxes  Document and Other Fees

Enter the tax rate as a decimal (i.e., a 1% tax is entered as 0.0100). If the tax has a maximum dollar amount, enter that amount. If the tax is a flat rate tax for major unit inventory purchases only (i.e., \$20.00 regardless of the amount of the purchase), enter that amount, but do not enter a percentage). Enter the associated General Ledger Account Code and select the **OK** button to save the information.

## 4.2 Trailer Sales Tax

The Trailer Sales Tax setup and its associated Trailer Trade-In (deduct trailer trade from trailer purchased for sales tax calculation), should only be used by those dealers whose state sales tax regulations require that the trailer price/trade-in trailer/ and trailer sales tax be calculated separated from the boat and motor (specifically Minnesota dealers).

**If your sales tax is calculating correctly Do Not Use These New Fields.**

From the F&I main menu select File, then System Set-up. If you have Regional Sales Tax setting (for different counties, etc.) you will need to set up each regional tax setting individually.

**System Setup Form**

General | FI Settings | Parts Dept | Service Dept | Other Info | User Fields | Accounting

Credit Life Type: SCLD  
 A H Type: R14DAY  
 Filing Fees: 15.00  
 Default Interest Rate: 8.891  
 Default Loan Years: 5.00  
 A + H Commission Percent: 0.400  
 Credit Life Commission Percent: 0.500  
 Accessories Mark Up Average: 0.500  
 Special Sales Tax Rate:  
 Title/Registration Fee: 170.00  
 Default Region For Sales Tax: ARKANSAS

Sales Tax Charged On Used Units  
 Deduct Trade In Amount Before Taxing  
 Base Tax Rate:  
 Tax Break Point:  
 Rate After Break Point:  
 Maximum Sales Tax:  
 Track Trailer Tax Separately  
 Deduct Trade In Trailer  
 Sales Tax Charged On Service Contracts  
 Property Tax Rate:  
 Battery Tax Rate (Each):  
 First Payment Days: 30  
 Default Sales Tax State: AR

Default Credit Life Co: Western Diversified  
 Regional Sales Taxes: City/County Taxes:  
 Document Fees:

/ Save   X Cancel   ? Help

If you have checked **Deduct Trade In Trailer** your Trade-In screens for your deals will display a field for entering the amount of the trailer trade-in.

#### Changing A Deal - Johnathon Coomes

General | Deal Information | Options/Accessories | Trade | Dealer Screen | Print Menu / Deal Notes | Sales Information

Product	Year	Make	Model	Trade Value
BOAT	1995	COBALT	232	4,000.00

Insert   Change   Delete

Lein Holder: \_\_\_\_\_ Total ACV: 4,000.00  
 Trade Allowance: 3,700.00  
 Trailer Trade Allowance: 500.00      Overallowance: **300.00**


/ Save   X Cancel   ? Help   Deposits

Calculate Credit Life?  
 Calculate Tax ?

If you are using Regional Sales Tax Settings you will need to set each item that needs trailer sales

taxed separately.

From the System Set Up, F&I tab, select the Regional Sales Tax button. Highlight each item that requires trailers taxed separately and click on the Change button.

**Record Will Be Changed** 

General | Fees | Unit Type 1 | Unit Type 2 | Unit Type 3 | Unit Type 4 | Unit Type 5 |

County/State:

Base Rate:  Base Rate 2:

Break Point:  Break Point 2:

Upper Rate:

Min Tax:

Max Tax:

Opts/Accs Tax Rate:

Deduct Trade In Amount Before Taxing  
 Sales Tax Charged On Used Units  
 Trailers Taxed Separately

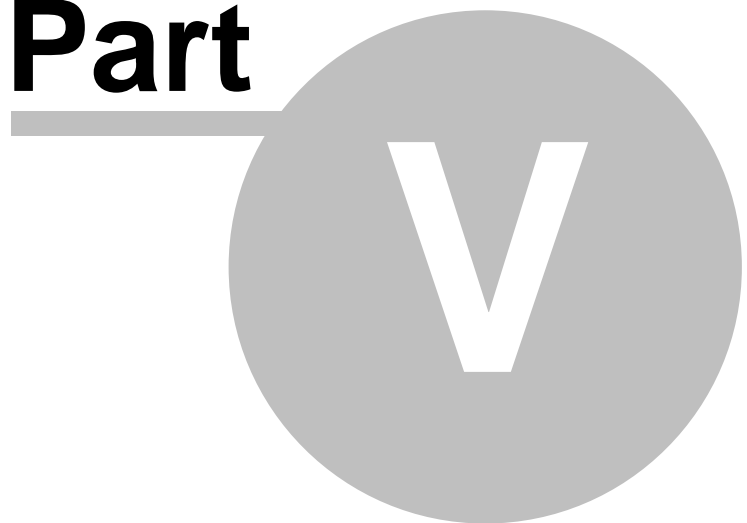
Do Not Tax Rigging  
 Do Not Tax Freight

Check the appropriate boxes and select the OK button.

Save your changes to the System Set Up by pressing the Save button.

# Total Control Software What's New for October 2003

**Part**



## 5 TCS Parts & Service Module

### 5.1 Alternative Parts Search

You can search for parts in current inventory from a work order or point-of-sale by using the Alternative Parts Search function.

From a Work Order, click on the Insert to insert a new part. At the part number field press the **F4** key on your keyboard.

**Record Will Be Added (New)**

Work Order No		Pay Type	Warranty
Line No			
Part No		Pricebook Lookup	2
Make			
Description			
Department		Stock Information	
Qty	1.00	On Hand	
Selling Price	0.00	List Price	
Extended	0.00	Bin Location	
Cost Each	0.00	Order Part	
Total Cost	0.00		

Taxable

/ OK    X Cancel    ? Help

The Alternative Parts Search is divided into three screens, Price Books, Current Inventory and Non-Inventory Items.



**Part Finder**

By Part Number | Current Inventory | Non Inventory

Make	Part Number	Description	On Hand	Bin	List Price
PAX	#99	INTERLUX #99 AEROSOL PAI	0		31.00
OMC	0000012	SPCL PRCE WNTR PK	-1		472.18
OMC	0000040		0		0.00
OMC	0000041		0		0.00
OMC	0000042		0		0.00
OMC	0000043		0		0.00
OMC	0000044		0		0.00
OMC	0000045		0		0.00
OMC	0000046		0		0.00
OMC	0000047		0		0.00
OMC	0000048		0		0.00
OMC	0000049		0		0.00
OMC	0000086		0		0.00
OMC	0000097		0		0.00
OMC	0000110		0		0.00
OMC	0000114		0		0.00
OMC	0000120		0		0.00

Double Click On The Part You Want To Select

Close

The by Parts Number (the entire Price Books File) allows you to scroll through to search for parts.

**Part Finder**

By Part Number | Current Inventory | Non Inventory

Search

Make	Part No	Description	On Hand	Bin	Price
OMC	0000012	SPCL PRCE WNTR PK	-1		0.00
LAN	1-04634800301	43BC CABLE 11 FT SST	1		0.00
BEN	1234	BOWL GASKET	-1		0.00
MERC	19183B	WASHER @50	-2		0.00
PAX	4323	NGK SPARK PLUG	-1		0.00
MERC	4323	CARBURETOR	-2		0.00
LU	573513	TOURN SERIES SLVR/WINE	4		0.00
LU	573518	PRO V SILVER/WINE	4		0.00
LU	573519	STRIPE SNGL 1/4 BLK	72		0.00
LU	573528	STRIPE DBL 1 3/8" WINE/SL	72		0.00
LU	573537	1775 SILVER DECAL	4		0.00
LU	573547	PENDANT MED WAVE WINE/S	2		0.00
LU	573553	LUND SILVER/WINE 99	4		0.00
LU	573564	TRPL STRIPE 1/8" WINE 99	72		0.00
LU	573566	STRIPE 1/4" SILVER	12		0.00
LU	573653	SE SILVER W/WINE	4		0.00
MERC	802837A 1	4CYL MPP4C32@12	0A-12		0.00

Double Click On The Part You Want To Select

Close

The Current Inventory screen allows you to scroll through for parts or search for a part by a keyword, description or partial description. Click on the Search button and enter your keyword, description or

partial description.

**Part Finder**

By Part Number | Current Inventory | Non Inventory |

0000012 | [CARB] |

Make	Part No	Description	On Hand	Bin	Price
OMC	0000012	SPCL PRCE WNTR PK	-1		0.00
LAN	1-04634800301	43BC CABLE 11 FT SST	1		0.00
BEN	1234	BOWL GASKET	-1		0.00
MERC	19183B	WASHER @50	-2		0.00
PAX	4323	NGK SPARK PLUG	-1		0.00
MERC	4323	CARBURETOR	-2		0.00
LU	573513	TOURN SERIES SLVR/WINE	4		0.00
LU	573518	PRO V SILVER/WINE	4		0.00
LU	573519	STRIPE SNGL 1/4 BLK	72		0.00
LU	573528	STRIPE DBL 1 3/8" WINE/SL	72		0.00
LU	573537	1775 SILVER DECAL	4		0.00
LU	573547	PENDANT MED WAVE WINE/S	2		0.00
LU	573553	LUND SILVER/WINE 99	4		0.00
LU	573564	TRPL STRIPE 1/8" WINE 99	72		0.00
LU	573566	STRIPE 1/4" SILVER	12		0.00
LU	573653	SE SILVER W/WINE	4		0.00
MERC	802837A.1	4CYL MPP4C32@12		0A-12	0.00

Pressing the Enter or Tab key will filter your current inventory and return only those items in inventory which contain the search criteria.

**Part Finder**

By Part Number | Current Inventory | Non Inventory |

[CARB] |

Make	Part No	Description	On Hand	Bin	Price
MERC	4323	CARBURETOR	-2		0.00

Double Click on the Part you wish to add to the Work Order or Point-Of-Sale ticket.

**Part Finder**

By Part Number | Current Inventory | Non Inventory

CARB Reset

Make	Part No	Description	On Hand	Bin	Price
MERC	4323	CARBURETOR			0.00

Copy Part Number To Clipboard  
Exit

Double Click On The Part You Want To Select

Close

Click on the Copy to Clipboard and the part will be inserted into your work order or point-of-sale ticket.

**Record Will Be Added (New)**

Work Order No: \_\_\_\_\_ Pay Type: Warranty

Line No: \_\_\_\_\_

Part No: 4323 Pricebook Lookup: 2

Make: \_\_\_\_\_

Description: CARBURETOR

Department: P

Qty: 1.00

Selling Price: 12.61

Extended: 12.61

Cost Each: 12.61

Total Cost: 12.61

Stock Information

On Hand: \_\_\_\_\_

List Price: \_\_\_\_\_

Bin Location: \_\_\_\_\_

Order Part

Taxable

OK Cancel Help

## 5.2 Multi-Vendor Setup

Below are the instructions for setting a Multi-Part Make and relating the parts to it. This should help with the cross-referencing/bar code scanning problems you were having.

From the Part & Service, select Parts, then Part Makes. Add a make code: MULT (OEM description Multi Parts), assign a department code if needed (i.e., P for Parts Department, etc.).

Now, go to Parts, Current Inventory, select the By Make & Part Number tab, change your Make Code to MULT and click the Add button.

**The Make will default to MULT. Assign a part number and description to the part you will be setting up. Enter the total quantity (from all vendors), and enter the cost and price.**

The related parts (i.e., from Hannay and Barclay) are only used in the future for ordering/receiving purposes – so that you can select which distributor to order the parts from and receive them in, however, the part once received will show in the quantities for the MULT make part, not the Hannay or Barclay part.

**Changing a Stock Record**

General | X Ref Parts | Remarks | Multi Bin

Make: [MULT]

Part Number: [ ]

Description: [4x4 BATTERY]

Qty Received: [ ]

Qty On Hand: [4.00]

Cost Each: [29.95]

Price: [49.95]

Department: [PARTS]

Min: [ ] Max: [ ]

On Order: [ ]

BIN Location: [A-03]  Multi Bin

Tax  Allow Discounts  Serial Numbered Item

The Price/Cost Is Maintained By Dealer

Special Tax Rate: [ ]

[ / Save ] [ X Cancel ] [ ? Help ]

Now select the X Ref Parts tab. Click the Insert button.

**Adding a XREF Record**

General |

AfterNo: [ ]

Vendor: [ ]

OEMNo: [9853]

Make: [MULT]

[ / Save ] [ X Cancel ] [ ? Help ]

**Adding a XREF Record**

General |

AfterNo: [89984T 4]

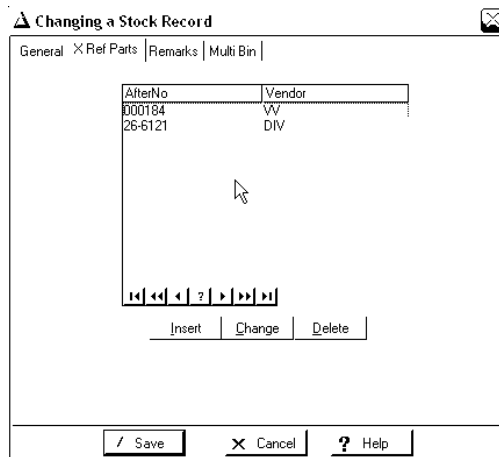
Vendor: [MERC]

OEMNo: [9853]

Make: [MULT]

[ / Save ] [ X Cancel ] [ ? Help ]

The part number you just created will display. Enter the part number you will be assigning to this part. (See above). Continue adding parts. Save your record.



- We have just created Part Number JR1234 (spark plug)
- It cross-references to XYZ Hannay and ABC Barclay
- If the UPC is different from JR1234, scan the UPC and assign it this part number.
- If you already have a UPC assigned to the XYZ and/or ABC, go to the View Edit Bar Code file and assign the JR1234 part number to the bar code record.

### 5.3 Work Order Deposits

1. Set up a Non-Inventory Item (Parts, Non-Inventory Items) called Deposit (Description Work Order Deposit), make sure to un-check the Taxable, check the Allow Discounts, give the part no price or cost. (if you want to assign it a department, it should be miscellaneous rather than parts).
2. To take a deposit:
  - a. Go to Quick POS, select Customer, find the customer and sell him/her Deposit, Quantity 1, amount of the deposit he is giving you on the work order, Save the Invoice, enter the payment method and close it out. You can print a copy for the store and/or for the customer.
  - b. To record the deposit to the work order, open the work order, if there are multiple problems, I would suggest Inserting a new problem, enter as the Job/Problem – "Customer Deposit", reference the Invoice # and date if you wish.
  - c. On the parts part of the problem, select Insert, Enter the Part Number as "Deposit", enter the quantity as a negative 1 (-1), enter the amount as a positive number (the system will handle the credit), save your problem.
  - d. You may wish to attach the Quick POS copy of the Deposit to the Work Order for your hard copy file.
3. When you close out the work order the amount the customer owes will be correct and you will have accounted for the original deposit on your cash report for that day, as well as accounting for the remaining amount the customer owes on the day the work order is converted to an invoice.

## 5.4 Work Order Overrides

Several new work order override and/or default settings have been added.

### Print Job Totals Only as a Default Setting:

If you wish to have a default setting to print job totals only on all work orders (instead of checking the box in the work order job/problem for each work order), you can set this up from File, System Setup, Service. Check the Print Job Totals on All Work Orders button.

**System Setup Form**

General | FI Settings | Parts Dept | Service Dept | Other Info | User Fields | Accounting

Retail Shop Labor Rate

Warranty Shop Labor Rate

Internal Shop Labor Rate:

Shop Supplies Percent   Charge Supplies On Labor Only

Max Shop Supply Charge

Customer No For Internal W/O's

Do Not Charge Sales Tax On Labor     No Tax On Shop Supplies

Black/White Only Work Orders     Show Labor Total Only On Work Orders

Do Not Print Work Order Disclaimers     Do Not Print Prices On Internal/Warranty Items

Default To Print Job Totals Only On Work Orders

Labor Tax Rate (If Other Than Standard)

You can override this setting for an individual work order job by unchecking the Job Totals check box at the bottom of the job. You still have the option of printing Labor Totals only on all work orders (this will still break down and print the individual parts items with dollar amounts).

Save your changes.

### Different Labor Tax Rate:

If your labor tax rate is different from the standard tax rate for parts sales in your state you can set up a different tax rate (Note: this is not the same as Non-Taxable Labor). From File, System Setup, Service Dept., enter your different tax rate for labor sales here.

### Non-Taxable Labor for Specific Jobs:

If you occasionally have specific jobs where the labor will not be taxed (Note: This is not necessary for Internal Work Orders). You can override the labor tax for this work order. From Service, Active Work Orders, Add New W/O, check the Do Not Tax Labor check box.

## Changing Work Order - 102 Rollins Val

General (F5 Key)		Problems (F6 Key)		Notes (F7 Key)											
Order No	102	Date In	2/27/03	Type	WOR										
Tech				Status	IN										
				<input type="checkbox"/> Tax Exempt	<input checked="" type="checkbox"/> Do Not Tax Labor										
<b>CUSTOMER</b> Customer No: 5018333281 Rollins Val 12010 Watson Road North Little Rock AR Phone 1: (501) 833-3281 Phone 2:			<b>UNIT INFORMATION</b> Stock No:  VIN No Motor												
Select Customer (F8)			Lookup Unit (F9)												
Date Promised		PO Number		<table border="1"> <thead> <tr> <th>Description</th> <th>Amount</th> </tr> </thead> <tbody> <tr> <td>Parts</td> <td>-397.44</td> </tr> <tr> <td>Sales Tax</td> <td>5.13</td> </tr> <tr> <td>Sub Total</td> <td>-392.31</td> </tr> <tr> <td>Customer Due</td> <td>-392.31</td> </tr> </tbody> </table>		Description	Amount	Parts	-397.44	Sales Tax	5.13	Sub Total	-392.31	Customer Due	-392.31
Description	Amount														
Parts	-397.44														
Sales Tax	5.13														
Sub Total	-392.31														
Customer Due	-392.31														
Service Location		<input checked="" type="checkbox"/> Override Shop Supplies	Shop Supplies												
Remarks															
Price Adjustment															
Print Work Order		Convert To Invoice		/ Save (F2 Key) X Cancel											

Save your changes.

## 5.5 Multiple Cash Registers

To set up your multiple registers (cash drawers) you will need to do the following:

1. At each workstation that has its own cash drawer, open the Parts & Service.
2. Go to File, then System Setup, then Other Info.
3. Enter a number for this cash drawer in the "Cash Drawer/Register No for This Terminal" box. They should be a single numeric/alpha designation (i.e., Front Counter is 1 or F).
4. Save your change.
5. Do the same as above at each workstation.
6. If you have two workstations sharing a cash drawer, give each of those workstations the same designation.
7. When you run your Cash Report at the end of the day, select Cash Report – Multi Register.
8. The print out will page break at each register, and give you a total for all registers at the end of the report.

# Total Control Software What's New for October 2003

**Part**





## 6 On-Line Price Book Update Instructions

### On-Line Price File Updating Instructions

#### **Important Reminder**

Please remember that any time you update your price books in TCS you must have all workstations and the server out of any Total Control Software programs – preferably out of all programs and any workstations shut down.

With all computers out of the Total Control Software programs (including the server), select the Price Book & Utilities function (Start, Programs, Total Control Software, or from an icon created on your desktop). Press the OK button for the warning.

#### **OMC/Omni Website Price File Update Instructions**

1. Access the OMC/Omni website at: <http://www.evinrude.com/dealerport/index.htm>
2. Enter your User ID and password
3. Click on OmniNet
4. Click on "Files Available for Download"
5. Click on "Pricing Updates"
6. Click on "USASCII.EXE"
7. Save in c:\winboat
8. Disconnect from the Internet. Close all programs.
9. From your desktop, select START, then RUN
10. In the prompt box type: c:\winboat\usascii.exe
11. If you are asked about overwritten files press the "Y" key
12. Close the black box by pressing the X in the upper right corner
13. With all computers out of the Total Control Software programs (including the server), select the Price Book & Utilities function (Start, Programs, Total Control Software, or from the TCS Price Book & Utilities icon on your desktop). Press the OK button for the warning.
14. Select OMC, then select Update OMC from CD or Internet File. The lookup should default to the Winboat directory. The file name is partbook.txt. Select OK to update your OMC price files.

#### **Mercury/Midas Price File Update Instructions:**

For those of you who are Mercury dealers and recently received your new Midas for Windows & Pricebook CD and have not yet updated your Mercury price files from the CD the following instructions apply. You should first install your Midas CD according to the instructions provided by Mercury at your Midaswin server and each workstation that will be accessing that program.

**Instructions for updating your Mercury pricing from your CD (received from Mercury) – this process can be used anytime you receive a new CD from Mercury (only the file name will change).**

1. With all computers out of the Total Control Software programs (including the server), select the Price Book & Utilities function (Start, Programs, Total Control Software, or from the TCS Price Book & Utilities icon on your desktop). Press the OK button for the warning.
2. Insert the CD from Mercury into the CD-ROM on the server.
3. Select Mercury, then select Midas Weekly Update.
4. When the box displays for your file location, change drives (bottom right) to the mapped drive letter for your CD-ROM. The directory of folders for should display. Find the folder "ASCII"

then the sub-folder "DOM".

5. The file 20010710.pbp should display in the available files box, select it and then select OK to run the update.

**Instructions for updating your Mercury pricing weekly (after your have followed the above steps):**

With all computers out of the Total Control Software programs (including the server), select the Price Book & Utilities function (Start, Programs, Total Control Software). Press the OK button for the warning.

A batch job import for Mercury on-line price file downloads has been added to the TCS Price Book & Utilities. It will automatically read all weekly price files that have been imported into TCS and allow you to batch process all the weekly price files at once.

1. With all computers out of the Total Control Software programs (including the server), select the Price Book & Utilities function (Start, Programs, Total Control Software, or from the TCS Price Book & Utilities icon on your desktop). Press the OK button for the warning.
2. When the Price Book & Utilities screen displays, select Mercury, then select Midas Weekly Update.
3. We have already installed the 8/13/2001 weekly update from the Midas for Windows CD (as described above).
4. When the box displays for your file location, change drives (bottom right) to the mapped drive letter for the computer where the Midaswin server program is located (this may be the server or a workstation that accesses the Midas website). The directory of folders for should display. Find the folder "Midaswin" and double-click on it. Then find the sub-folder "History" and double-click on it.
5. A list of files will display on the left side of the screen, select the oldest week's update after the 20010710.pbp we just installed (i.e., 20010813.pbp) and select OK to run the update.
6. Repeat the instructions for each week's update from the Midaswin History files to the most current week.

You should do this once a week after accessing the Midas website to keep your price files current.

**Volvo Website Price File Update Instructions:**

1. Access the Volvo website at: <http://www.vppartnernetworkus.com>
2. Enter your User ID and password
3. Click on Downloads
4. From the Download Center, click on "Parts Price Files"
5. Click on "Download the Price File For The Price Lookup Program"
6. Click on "Price\_Update.exe"
7. Save in c:\winboat (or in the directory on the server is you are accessing this website from a workstation)
8. Disconnect from the Internet. Close all programs.
9. From your desktop, select START, then RUN
10. In the prompt box type: c:\winboat\price\_update.exe
11. Make sure the file extraction is to the winboat directory. If you are asked about overwritten files press the "Y" key
12. Close out of the file extraction after the update.txt extraction is complete
13. With all computers out of the Total Control Software programs (including the server), select the Price Book & Utilities function (Start, Programs, Total Control Software, or from the TCS Price Book & Utilities icon on your desktop). Press the OK button for the warning.
14. Go to the TCS Price Book & Utilities program

15. Select Other Vendors, then select Vendors (S-Z), then select Volvo. The lookup should default to the Winboat directory. The file name is update.txt. Select OK to update your Volvo price files.

#### **Honda Net Website Price File Update Instructions:**

1. Access the Honda website at: <http://www.hn4w.com>
2. Enter your User ID and password
3. Click on
4. Click on "Information Library"
5. Click on "Parts"
6. Click on "Price List Download"
7. Enter your User name and password
8. On the left side of the screen click on "DPPL"
9. Choose "The Complete Price File For The Current Month Through The File Date"
10. Save the file in your WINBOAT directory
11. The File name is "mo.rdpdppl\_full\_pe.exe"
12. Disconnect from the Internet. Close all programs.
13. From your desktop, select START, then RUN
14. In the prompt box type: c:\winboat\mo.rdpdppl\_full\_pe.exe
15. Make sure the file extraction is to the WINBOAT directory. If you are asked about overwritten files press the "Y" key
16. Close out of the file extraction after the update.txt extraction is complete
17. With all computers out of the Total Control Software programs (including the server), select the Price Book & Utilities function (Start, Programs, Total Control Software, or from the TCS Price Book & Utilities icon on your desktop). Press the OK button for the warning.
18. Go to the TCS Price Book & Utilities program
19. Select Other Vendors, then select Vendors (A-J), then select Honda Marine. The lookup should default to the Winboat directory. The file name is full\_pe.dat. Select OK to update your Honda price files.

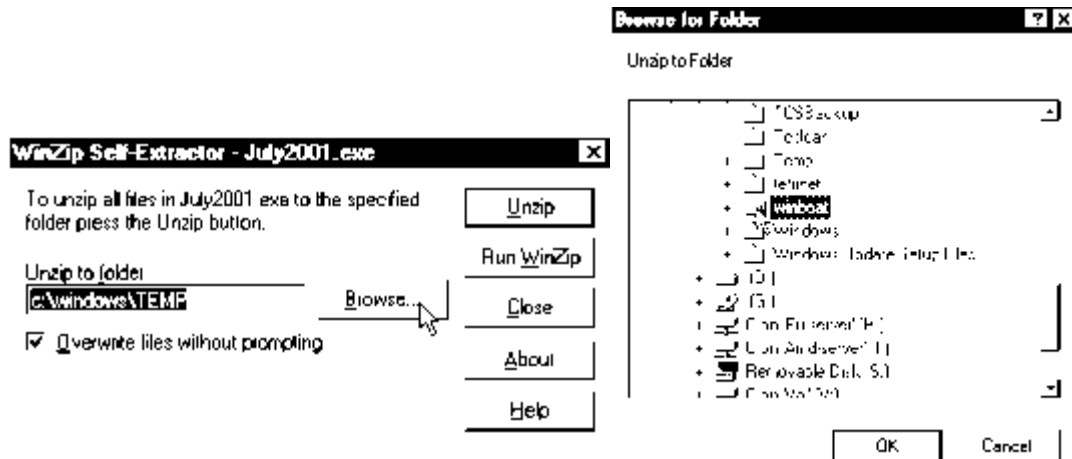
#### **Ellett Brothers Website Price File Update Instructions:**

1. Access the Ellett Brothers website at: [www.ellettbrothers.com](http://www.ellettbrothers.com)
2. Click on Dealers
3. Enter your User ID (log-on) and password
4. Click on Dealer Information
5. Click on "Dealer Downloads"
6. Click on "Download EllettDB.exe" (at the bottom of the screen)
7. Save the file to Disk
8. Select the WINBOAT directory on your server as the location to save this file.
9. Disconnect from the Internet. Close all programs.
10. From your desktop, select START, then RUN
11. In the prompt box type: c:\winboat\ellettDB.exe (or the drive letter to your server if you are accessing these files from a workstation)
12. Make sure the file extraction is to the WINBOAT directory. If you are asked about overwritten files press the "Y" key
13. Close out of the file extraction after the ellettDB.exe extraction is complete
14. With all computers out of the Total Control Software programs (including the server), select the Price Book & Utilities function (Start, Programs, Total Control Software, or from the TCS Price Book & Utilities icon on your desktop). Press the OK button for the warning.
15. Go to the TCS Price Book & Utilities program
16. Select Other Vendors, then select Vendors (A-J), then select Ellett Brothers. The lookup should default to the Winboat directory. The old file name was catalog.txt that Ellett Brothers

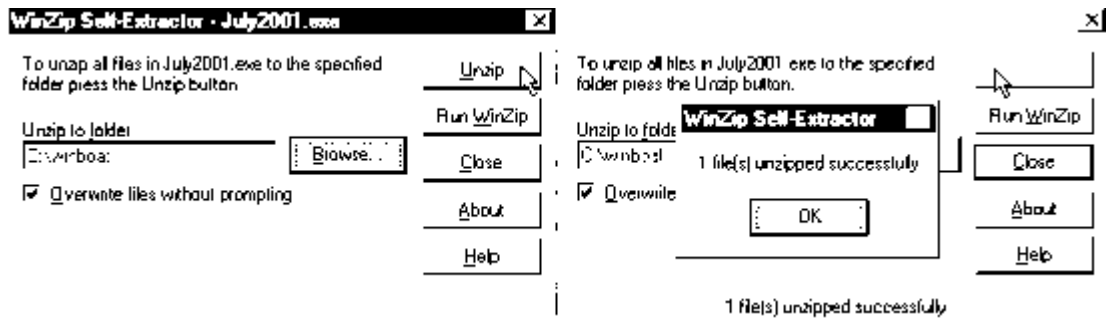
used for their price files. You will need to select the ALL FILES at the bottom of the screen and find the file name **ellettodb.txt**. After you have highlighted the file select OK to update your Ellett Brothers price files.

#### **Cobalt On-Line Price File Update Instructions:**

1. You will need to have downloaded and installed the TCS update from our website (after August 13, 2001) in order to perform the Cobalt Price Book updates.
2. You must be set up with Cobalt prior to installing this price book update. Please check with Cobalt if you have any questions regarding your dealer log-ins to their website.
3. This on-line updating is effective with Cobalt's July 2001 update file. Cobalt updates their pricing on a monthly basis and the file name will change monthly (i.e., July2001.exe, August2001.exe, etc.)
4. **To update your Cobalt price books to TCS:**
  - a. Go to the Cobalt Dealer Website and log in
  - b. Click on Pricing
  - c. Click on Download Parts Price List
  - d. Select Save This Program To Disk – and select your Desktop as the location to save the file. File will be named July2001.exe (this file name will change from month to month)
  - e. After download is complete, exit from the internet. You will have an icon on your desktop "July 2001"
  - f. Double-click on the July 2001 icon. The self-extracting winzip screen will display.
  - g. Click on the Browse button, and change the directory (folder) to the WINBOAT directory on your server.



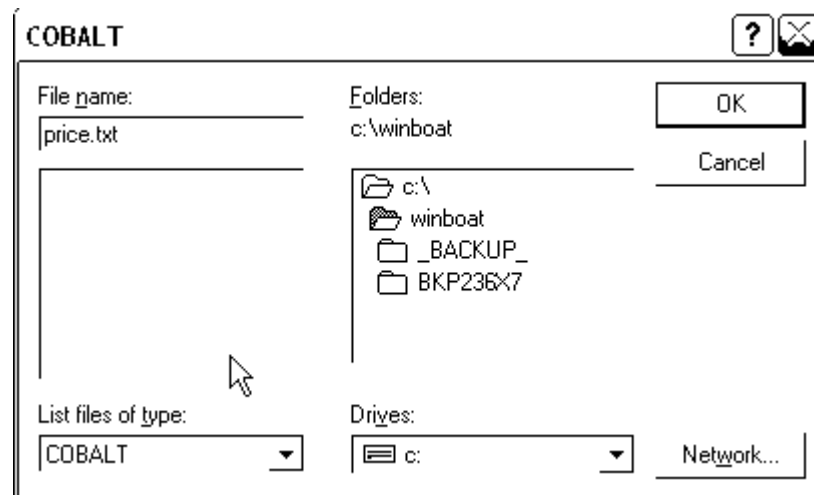
- h. After you have found the WINBOAT directory on the server, click on it (so that the folder is open) and select the OK button.



- i. Press the UnZip button.
- j. You can now delete the July2001.exe icon from the Desktop on your computer.

#### 5. To install the price book update to TCS:

- a. With all users out of the Total Control Software programs, from the server (or designated workstation) open the TCS Price Book & Utilities program. Select Other Vendors, then Other Vendors (AJ), then Cobalt.
- b. The directory should default to your WINBOAT directory and the file name is PRICE.TXT and should display in the File Name box as well as directly below it. Select the OK button to run the price book update for your Cobalt parts prices.



#### Bombardier On-Line Price File Update Instructions:

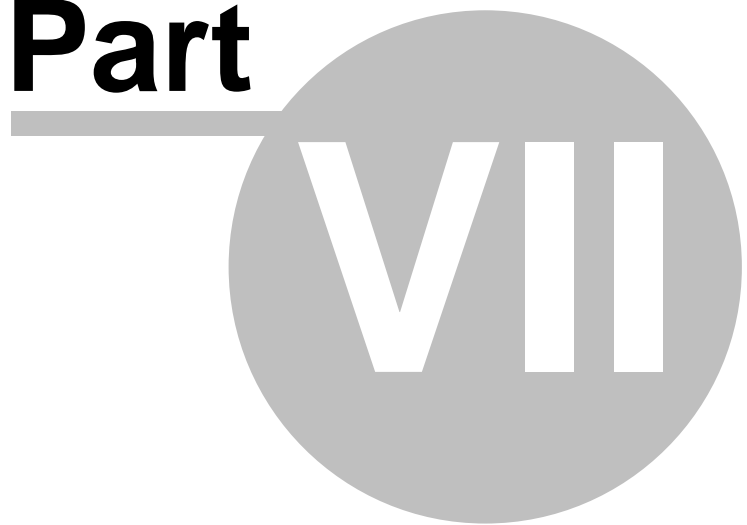
**VERY IMPORTANT:** Although Bombardier's Bossweb files for Ski Doo, Sea Doo, and ATV are downloaded from their website separately as executable files with different file names, the extracted files are all named the same (prclst.txt). You can download and save all three files (if you need them) and save them to the desktop on your server, HOWEVER, you must extract each file individually, run the price book update from TCS Price Book & Utilities for that file, before you proceed to the next file.

1. Access the Bombardier Bossweb website at: [www.bossweb.bombardier.com](http://www.bossweb.bombardier.com)
2. Enter your User ID and password
3. Click on "Enter Bossweb"
4. On the Menu Bar click on Sales, then select Price List PAC

5. Select Ski Doo, Sea Doo, and/or ATV file format: All Categories ACSII
6. Click on the file for All Categories ACSII
7. Save the file to Disk
8. Select the DESKTOP directory on your server as the location to save this file.
9. Repeat this for each of the other price files you need, saving each to the desktop on your server.
10. Disconnect from the Internet. Close all programs.
11. The file names (icons) are as follows:
  - a. SkiDirUSAAITxt.exe (Ski Doo price files)
  - b. MarDirUSAAITxt.exe (Sea Doo price files)
  - c. ATVDirUSAAITxt.exe (ATV price files)
12. From your desktop, double-click on the first icon
13. The file extraction box will display
14. Change the file location from c:\windows\temp to the WINBOAT directory (i.e., c:\winboat). If you are asked about overwritten files press the "Y" key
15. Close out of the file extraction after the file extraction is complete
16. With all computers out of the Total Control Software programs (including the server), select the Price Book & Utilities function (Start, Programs, Total Control Software, or from the TCS Price Book & Utilities icon on your desktop). Press the OK button for the warning.
17. Go to the TCS Price Book & Utilities program
18. Select Other Vendors, then select Vendors (A-J), then select Bombardier. The lookup should default to the Winboat directory. The file prclst.txt should appear. Select OK to run the price file update.
19. Repeat steps 12 through 18 for each succeeding price file you need to update.

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**Part**

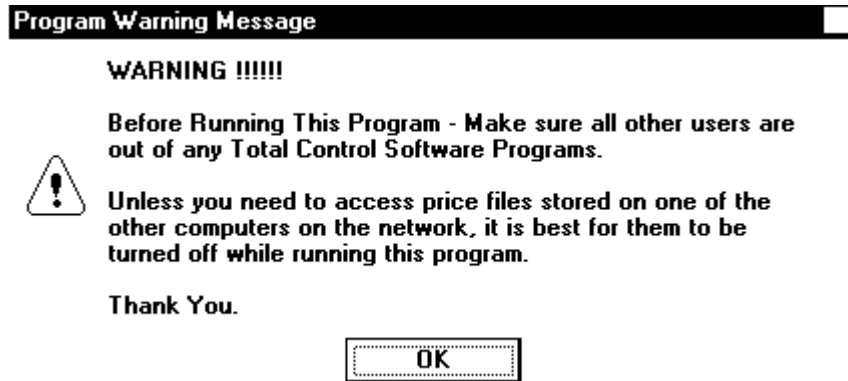


## 7 Price Book Update Instructions

The following are reminder instructions for the Price Book and Utilities Program. Please read these instructions completely before beginning your price book updates. A sample listing of available Parts Books is included below.

### Price Book Updating Instructions (Reminder)

Before using the **Price Book and Utilities Program** you **MUST** shut down all other computers on the network. From the Server on your network (see also below), after doing so, go to Start/Programs/Total Control Software/Price Book and Utilities. The following screen will display:

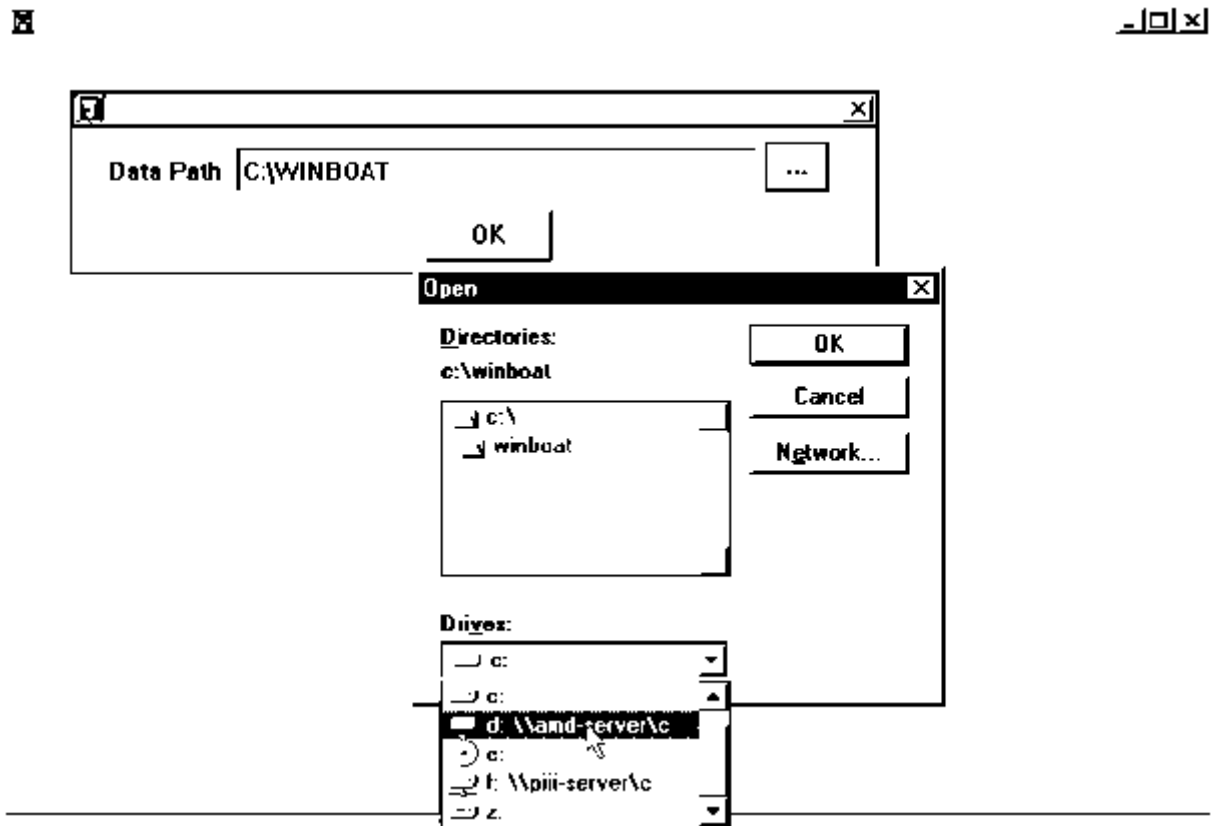


After checking your workstations, click OK. The following **Main Menu** will appear:



The first time you open the Price Book & Utilities screen you will be prompted for the Data Path for your price book files. If your system has a dedicated server (accessed from a workstation), be sure that the Data Path is correctly set. From that workstation, select File on the Main Menu, then Set Data Path, at the prompt box make sure that the drive letter for your server is correct (i.e., f:\winboat).



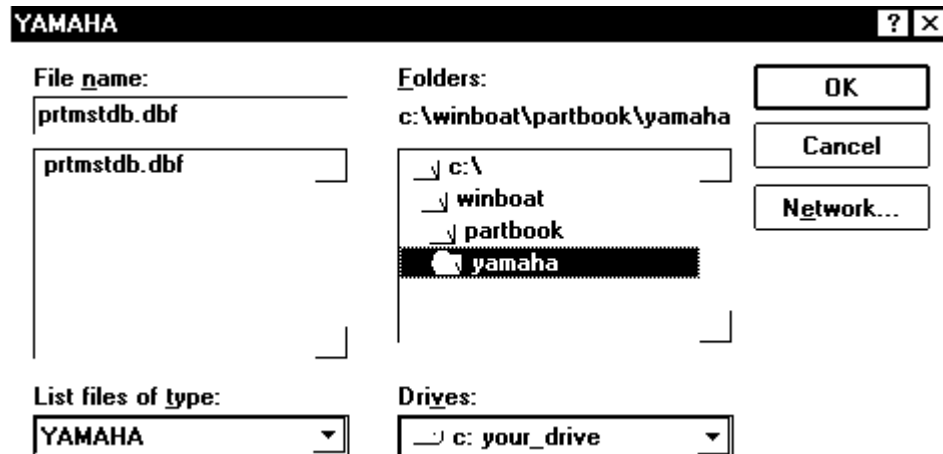


Insert your **Price Book and Program Update CD** into your CD-ROM drive.

The following is a sample list of files included on Quarterly Update CDs:

Vendor	Location-Filename	Date	Make Code
Articat	\PARTBOOK\ARTIC\SNOWMOBI.ART	Dec 98	ART
Bell Industries	\PARTBOOK\BELL\BELL.TXT	April 99	BEL
Benrock Marine	\PARTBOOK\BENROCK\BENROCK.TXT	Feb 99	BEN
Coast Marine			
Prices	\PARTBOOK\COAST\COASTMAR.TXT	Feb 99	COA
Ellett Brothers	\PARTBOOK\ELLETT\CATALOG.TXT	Apr 99	ELL
Mercury Marine	\PARTBOOK\MERCURY\MERCURY.DMS	4 Apr 99	MERC
OMC	\PARTBOOK\OMC\PARTBOOK.TXT	Feb 99	OMC
Yamaha	\PARTBOOK\YAMAHA\PRTMSTDB.DBF	Apr 99	YAM

To access and update these files, from the **Main Menu** select the menu item (i.e., Yamaha) for the price file you would like to import. The following screen will be displayed:



The file name for this price list should display in the box under **File name:** on the left side of the screen and should also appear in the list. In the event that your CD Drive is other than the standard "D" change The drive letter by pressing the **down arrow** under **Drives:** in the lower right side of the screen. Once you have selected the file press **OK** to begin the file processing.

The following screen will display during processing:

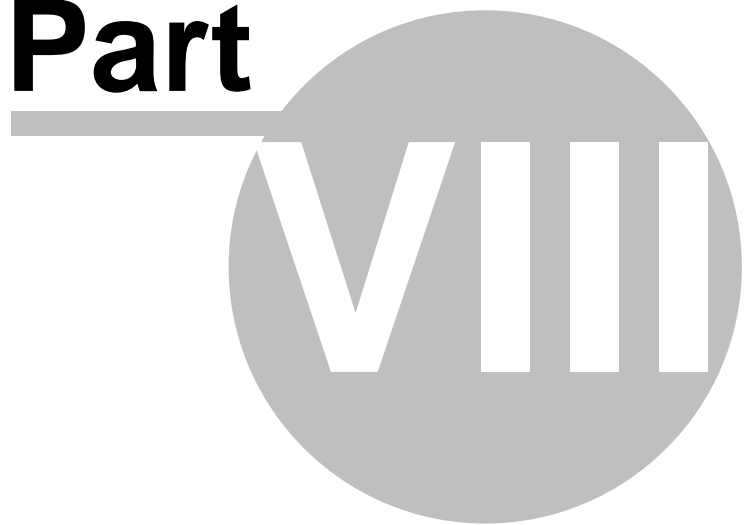
Count	100
Added	0
Changed	100



When the price book update is completed, this screen will close and return you to the **Main Menu**.

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**Part**



## 8 Passwords and Log-ons

A level 50 password level has been added to the TCS Passwords for the F&I module of the software. This level gives access to cost information, but not the ability to change, edit, or delete and costs.

For more information on setting up passwords and log-ins, see the Supervisor/Network Administrator manual or PDF file.

More intermediate levels are being added to allow for more specific access of the software modules.