

Configuration Questions

a. Accounting / Tax

The questions in this section REQUIRE an answer. *

1. * Please list the days your shop is open, store hours, and time zone.
2. * List the credit cards you accept. Please include any fleet or manufacturer cards.
Example: Visa, Mastercard, Discover, AMEX, Firestone (CFNA), CarCareOne (Synchrony Bank), etc.
3. * What are your sales tax rates for each store?
4. *What is your default labor rate?
5. * Is labor taxable in your state?
6. * Do you charge shop supplies? If yes, are shop supplies taxable in your state?
7. * Are there any scrap / disposal fee taxes in your state? (Ie. tire scrap tax or oil disposal tax.) If your state has any scrap / disposal tax, please advise either the dollar amount or percentage.

b. System Settings

The questions in this section are OPTIONAL. If you do not answer, the system will default to the setting listed below. You can decide these answers now or after you Go Live.

8. Would you like the system store date to be automatically set on days your store is open, or prompt the user to set the store date (Default = Auto Set Store Date)
9. When printing an invoice, how many copies, you wish to print?
(Default= 1)
10. Print pricing on work order? (Default = Yes)
11. On the customer's invoice, show Quantity x Unit Labor (ie. 2.5 hours x \$75 /hour) or only Total Labor Price (\$187.5)?
(Default = Quantity x Unit Labor)
12. Do you want to force your salesreps to put their salesrep code on the quote / workorder when the quote or workorder is created? (Default = No)

13. Do you want to FORCE DOT#s entry on tickets with tire items, WARN DOT#s are missing but still allow ticket to be closed, or NO DOT# enforcement (Default = NO DOT# enforcement.)
14. On printed invoice, how do you want items that have been declined to show display? (Options = Recommended, Declined, Suggested.) (Default = Recommended)
15. The system is defaulted to *require* a vendor name and vendor invoice # for every “outside part” that is placed on a customer’s invoice. The system requires that the vendor and vendor invoice # has been added to this invoice before the invoice can be closed. This helps ensure parts order can be tracked. Would you like to keep this default requirement, or turn it off? (Default = Required.)
16. The system is defaulted to automatically create a receipt when “outside parts” are invoiced. When the customer’s invoice is closed, the parts receipt is automatically created. This helps ensure parts orders can be tracked. Would you like to keep this setting turned on? (Default = ON.)
17. Do you want users to be allowed to VOID open work orders? If so, what are acceptable reasons for a work order to be voided (i.e. duplicate, customer cancelled, etc.)?

c. AR / Credit Management

The questions in this section are OPTIONAL. If your shop does not carry charge accounts, you can skip this section.

18. What is your Monthly Finance Rate for AR accounts?
19. What is your AR cutoff date? The 25th or the last day of the month?
20. What is your “Remit To” address for your A/R Statements?
21. Do you plan to use the AR Credit Management Module that prevents sales to accounts past due?
22. If you said yes to (#21), would you like to block invoicing to customer who have:
 - a. Exceed Credit Limit (Yes / No)
 - b. Exceed Allowable Days Past Due (Yes / No)

23. If “Yes” to above question, what would you like to be set as system default for Allowable Days Past Due?

d. Appointments/ Bay Management

The questions in this section are OPTIONAL. If your shop does not take appointments, you can skip this section or only answer questions you know the answer to.

24. What time do you want the Appointment List & Bay Management screen to start? (Default = 7am)

25. What time do you want the Appointment List & Bay Management screen to end? (Default= 7pm)

26. Force an appointment time and bay assignment on every work order? (Default = No)

27. Force vehicle status when setting up an appointment? (Default = No)

28. Force promised time when setting up an appointment? (Default = No)

29. Upon clicking the Appointment icon on the toolbar, which screen would you like to be the default? Appointment List? or Bay Management? (Default = Bay Management.)

30. The following are the DEFAULT appointment codes. If your need additional appointment codes, please list them below.
(Default Appointment Codes = AC/ Heat, Diagnostic, Brakes, Flush, Oil Change, State Inspection, Alignment, Tires – New, Tires – Repair, Battery/ Electrical, Multiple Services.)

31. If using Bay Management, please tell us how many bays, and the name on each bay if they are specific to work type / or technician.

e. Commercial / Wholesale

The questions in this section are *only* required if your business has commercial or wholesale operations.

32. Do you deliver goods sold to customers / perform road service? (YES/NO)

33. If you answered YES to (#28)... Do you deliver goods / perform road service to any TAXABLE customers? (YES/NO)
34. If above (#29) = YES... How many taxing jurisdictions do you deliver to / perform road service in, for which you have taxable customers?
35. If you answered YES to (#28)... Do you have customers with multiple ship-to addresses? If yes, are these multiple ship-to addresses stored in your current software system?
36. If you answered YES to (#28)... Are your customers assigned to "Routes" in your current software system? If so, how many route assignments do you have? Are these routes currently in your software system?
37. Do you have any TAX EXEMPT customers? (YES/ NO)
38. Do you have any FET EXEMPT customers? (YES/NO)
39. Do you have customers with government contract pricing? (YES/NO)

***** NOTE ABOUT CUSTOMER PRICING PROFILES *****

Later in the configuration and setup process we will have a conversation with you about Customer Pricing Profiles. These might be customer-specific pricing profiles or template-based pricing profiles.

Besides general Price Codes 1-4 for inventory, **no customer-related pricing profiles are imported as part of the data conversion process and will need to be set up from scratch in HITS.**

HITS has many flexible customer pricing options that we will show you and assist you in setting up.

f. B2B E-Commerce

40. Are you currently using an e-commerce platform? HITS will attempt to use your customer's log ins and passwords if possible. Do you have a way to retrieve your customer's log ins and passwords for your current e-commerce platform?

41. Do you manage or have access to your e-commerce domain (example- www.abctireonline.com)? If you do not, who currently manages your domain?
42. E-Commerce Orders alert users in the system that a new E-Order has come in. There are two methods for alerting the user.
- Forced Pop-Up** – The Forced Pop-Up Alert will pop-up a box telling the User a new order has come in. The User is required to acknowledge the new order. Even if the User is not using the HITS software (example- *is on a website*), the Pop-Up will interrupt the screen to alert to the new order.
 - Red Flashing Bar** – The Red Flashing Bar will blink in the upper-right hand corner of the HITS software, signaling to the User that there is a new order. It does not interrupt the User's work, and the User can process the order when they are ready.

Please indicate which alert system your business would like to use.

The alert method can be set different by user. For example, Sales Staff can use the (a.)Pop-Up, while the Warehouse Manager can use the (b.)Red Flashing Bar. This can always be changed at a later date, or you can request more information if unsure.

43. In addition to the Alert functionality, E-Orders can Auto-Print to a printer in the warehouse. Would you like to be set up for Auto-Print of E-Orders? (YES/NO)