Corporate System File

The corporate system contains store specific information that makes it possible to customize the operation of HITS for each location.

WARNING: Some of the fields in the store system file contain on-line information that is maintained by HITS and should not be changed without assistance from the HTSC. Do not worry, fields used for on-line information are so noted. **Only those fields that are currently used will be referenced below. Please disregard any information in unused fields.**

Note: Just as there is a **corporate** system file for all of HITS M/S, there is also a **store** system file for each store for customizing the operation of HITS at each location.

The following is a list of the fields in the corporate system file along with a brief description and a typical entry, where applicable. Not all fields are used. Unused fields are either not listed or are listed with "n/a".

If a field requires specific values, those values will be listed and described. If a field has a typical or preset value, the value will be identified.

COMPANY: n/a (This field is not displayed.)

SYSTEM DATE: This is date set by the last store to set a store date.

CITY: This is the city where the company is located to which HITS is licensed. This field is used as part of the license control system and should not be changed.

STATE: This is the state where the company is located to which HITS is licensed. This field is used as part of the license control system and should not be changed.

ZIP: This is the zip code where the company is located to which HITS is licensed. This field is used as part of the license control system and should not be changed.

2: **VSR Tracking** - Activates the tracking of Vehicle Service Reminders. With this option activated, service reminders will be created and updated when inventory items flagged for VSR tracking are invoiced. This option must also be activated when using **future service reminders**.
<**V**>: Track VSRs.
< >: Do not track VSRs.
Default: <V>

3: **BATCH MODE PROCESSING** - HITS provides the capability to print invoices at the point-of-sale as though they are finalized without the invoices actually being closed. Invoices marked as **batch** closed are then finalized and processed with a separate program prior to the running of the Daily Closing routine.

This capability is provided for those dealers who want the opportunity to allow authorized personnel, such as bookkeeping staff, to correct errors on invoices **before** they are actually **closed**. Once an invoice is **closed**, totals, line items, customer, and other critical accounting related information can not be changed.

By running HITS in batch mode, personnel at the Sales Counter can freely process tickets without the anxiety about a mistake. For example, a typical error is to charge an invoice to the wrong customer or to forget to enter cost on an outside purchase item. These corrections can be easily made when running HITS in batch mode.

HITS provides a very powerful password control system that can be used to restrict who is permitted to **re-open** a ticket that has been marked for batch closing. Typically, Sale Counter personnel are **not** permitted to re-open a ticket marked for batch closing. Allowing Sales Counter personnel to do so could lead to theft since someone could process a cash ticket for a labor item, such as a flat repair, print the ticket, then re-open the ticket, delete the line items, and then use the ticket again for another customer. In this scenario, there would be no audit trail of the cash receipt.

Note: Password setting **P58** controls access to batch closed tickets. If you elect to run HITS in batch mode, be sure to set P58 as desired for **each** user on the system.

Note: Regardless of whether you run HITS in batch mode or not, the password system provides the capability for users to edit **non-critical** accounting information on invoices such as salesman, mechanic, department, notes, etc. Password setting **P4** controls access to this information on both batch closed and hard closed invoices.

<**B**>: Run HITS in batch mode.
< >: Run HITS in real-time mode.
Default: <B>

6: **Allow Edit To Stocking Goods COST At POS** - This option provides the ability to edit the cost of a **stocking, goods** items provided password permission P32=!.

WARNING: We do **not** recommend allowing edits to the cost of a stocking goods item at the point-of-sale. Doing so will **by-pass** the calculation of average cost for the item and will result in incorrect inventory value being maintained by the system since you are relieving inventory at other than the current average cost.

WARNING: If you are editing cost on a line item of an invoice because the customer is FET exempt and you are editing cost to remove the FET from cost, we recommend that you set the customer's account status to FET Exempt rather than adjust cost. Customers who's accounts are flagged as FET Exempt will have FET automatically deducted from the item's cost when the ticket is CLOSED. However, if you decide **not** to set the customer's account to FET Exempt, you **must** be sure to also edit the line item's FET amount which is done by using Action Code "L" for **long edit**, provided the edit you are making involved FET. (A long edit allows access to both the cost of the product, which includes FET, and the FET amount itself.) REMEMBER, HITS **always** considers that FET is included in cost. The additional line item field for UNIT FET is used for internal updating purposes. Therefore, if a customer's account is set to FET Exempt **and** you edit cost but **not** the line item's FET, the FET amount will be backed out of cost again when the ticket is closed resulting is FET being backed out twice.

<**!**>: Allow edit to cost of stocking, goods items if user's password permission P32=!.
< >: Do not allow edits to cost of stocking, goods items.
Default: < >

7: **Customer Short Name Generation Method** - The field determines how HITS auto-generates customer short names when adding new customers. Three methods are supported as listed below.

<**1**>: Attempt to generate on last name only. **(Recommended)**
<**2**>: Generate using the first 10 characters of the name field.
< >: Attempt to generate based on the traditional 4 + 4 method (first 4 of last name plus a space plus first 4 of first name).
Default: <1>

Note: If you are using the traditional method of **4 + 4** and decide to change to one of the other methods, be sure to contact the HTSC so that they can make the internal change necessary to fully implement the other methods. Otherwise, your customer scans will not display as anticipated.

Note: Regardless of the method of short name generation, all new installations are configured to include the customers' **full name** as part of the sort when listing customers in short name order. If your listings of customers do **not** appear to be in the correct order (or sub-order), please contact the HTSC so that they can confirm that your system is properly configured. (Reference note to HTSC: dfindex 9 2 2 4 0 **and** dfindex 9 5 74 2 4 0.)

8: **Always Update Average Cost With Last Receipt Cost** - This option causes the average cost to be updated with the last receipt cost when a receipt is closed.

<**R**>: Always update average cost with last receipt (replacement) cost.
< >: Compute true average cost based on the current average cost and quantity on hand and the receipt cost and receipt quantity.
Default: < >

WARNING: We do **not** recommend using this option since doing so causes the value of any on-hand inventory to be changed to the last receipt cost. Additionally, the system's total inventory value is **not** adjusted by the change. We **strongly** recommend that you check with your accounting professional before implementing this option.

9: **No Raw Size or Lost Sale-Insufficient Stock Capture** - This option provides the capability to capture information when using the inventory scan routine that can help you track lost sales, insufficient stock status, and raw sizes for which you have not inventory item. The data capture is available via a report that can be used to help you determine what items you should be stocking or carrying higher quantities of.

<**R**>: Capture only those raw sizes that are requested but are not in the system.
<**L**>: Capture only those items that you stock but for which you had insufficient stock when a customer called and requested that specific item.
<**B**>: Capture both raw size and lost sale items.
< >: Disable this feature.
Default: < >

10: **Activate Customer C.O.D. Control** - This option provides the ability to control whether the C.O.D. flag in the customer file is restricted to selected employees. This option works in conjunction with password permission P34. Once activated, the system will look to password permission P34 to see if it too is equal to "!". If it is, that user will be permitted to edit the customer C.O.D. entry.

<**!**>: Activates customer C.O.D. editing based on password permission P34="!".
< >: Feature is de-activated.
Default: < >

11: **Validate DCM Order Quantities** - With this option set to "Y", quantities ordered by DCM dealers are validated against available inventory. If a DCM dealer attempts to order an item with insufficient available quantity, the dealer is advised that his order can not be processed. Available quantity validation is performed both when the item is added to a DCM order and just before the order is "submitted" by the dealer. On screen instructions are provided to the DCM dealer to resolve the invalidate quantity.

<**Y**>: Activates available quantity validation on DCM orders.
< >: Feature is de-activated.
Default: < >

12: **Allow DCM Clients Access To (generic) A&A Web Listing of Manufacturers' Web Pages** - With this option set to "N", DCM clients will not be permitted to access the (generic) A&A web listing of manufacturers' web sites from within DCM. In fact, the option for "Web Pages-Tire" will not even display on the main DCM menu.

<**N**>: Blocks access to the (generic) A&A web listing of manufacturers' web sites from within DCM.
< >:   Access permitted.
Default: < >

13: **Automatically Reassign Customer's Store# Based On Last Store To Invoice** – On cash customers only, if this option is NOT set, the customer store number assigned in the customer master record will be changed to the store number of the store which last invoiced the customer. For example, with this option set to " ", customer# 12345's store assignment will be stamped to store #3 if store# is the last store to invoice the customer. **Note:** This option **only** applies to cash accounts, not A/R charge customers and not to the store's default cash account. Leave this option blank to automatically have store assignments (and VSRs) automatically follow customers when they change their buying location from one store do another because either they move or you add additional stores. If set to "S", automatically reassigning is Skipped.

< >: Automatically reassign the customer's store# to the last store# that invoiced the customer.
<**S**>: Skip the customer's store# assignment
Default: < >

14: **BLOCK Invoicing To Customers Based on Credit Limit** - With this option set to "Y", if a charge customer has a credit limit, the customer's current A/R balance plus the amount of the ticket cannot exceed the credit limit. If it does, invoicing to that customer is blocked.

<**Y**>: Blocks invoicing if customer credit limit is exceeded.
< >: User is warning about over credit limit conditions, but the ticket is not blocked from processing.
Default: < >

Note: If you implement this option, be sure to set password.p26=Y for **only** those users who are permitted to make edits to charge customer accounts, including edits to credit limits. Users with password.p26 set to other than "Y" will **not** be able to increase a charge customer's credit limit and therefore, will **not** be able to process a ticket for a charge customer who has exceeded their credit limit.

15: **{Reserved TCCMS Activation Key}** - Do not make any changes to this entry without assistance from the HTSC.

17: **Accounting Link Activation** -Activates Accounting Link.
<**A**>: Activates Accounting Link

18: **Exact Find On Inventory Scan** - If this option is set to “E” and the user enters a raw size on the inventory scan that results in no items being found, the user will be prompted with a “No Match” prompt and will need to press the ‘Y’ in order to continue. This option is primarily used by wholesalers who wish to search for exact sizes.

19: **(BPOS)** *** **Demo Version Flag *** ** - {For use by HTSC only – set information bar to indicate demo version.}

20: **Activate ATD Link** - {Under Development - Contact HTSC for more details.}

<**A**>: {Under Development-Contact HTSC for more details.}
Default: < >

21: **ATD Link Update Mode** - {Under Development-Contact HTSC for more details.}

<**1**>: {Under Development-Contact HTSC for more details.}
<**2**>: {Under Development-Contact HTSC for more details.}
<**3**>: {Under Development-Contact HTSC for more details.}
Default: < >

22: **BPOS99 – Technician Cost Capture** – In BPOS99 you have the option to capture service cost based on a base rate for the technician assigned to the line item. This switch activates that capture. If not specifically activated, technician base rate is not capture for service line items.

<**1**>: Activates capture of technician base rate a unit cost on service items.
Default: < >

Note: If you activate this option, you will not be able to change technicians on closed tickets. That is because once a ticket is closed, sales history, including cost, is updated in several files. Permitting a change of a technician when cost capture is activated would produce mis-matches in data verification routines. Use the ticket Reverse/Replicate option to change technicians when this option is activated.

24: **Disable Customer Alerts In BPOS** - You can selectively disable customer alerts during invoicing by entering the cumulative total for the items you wish to disable. Example: 1 + 4 = 5 to disable Past Due and “@” alerts from notes.

<**1**>: Disable Past Due alert.
<**2**>: Disable Credit Limit alert.
<4>: Disable “@” in Notes alert.

25: **Default Price Code During Invoicing (Legacy)** - If the customer does not have a specific default price code in their master record, use the value in this setting as the default.

<0,1,2,3,4>
Default: <blank>
Suggested Default: <1>

26: **BPOS Reset To Cash Account On Inventory Lookup** – BPOS implements a concept called “Active Customer”. That means that once you “touch” a customer account, it stays “active” no matter where you go in BPOS. This can be enormously beneficial but also has a downside. Image you have as your “active” customer, a client that gets a lower price than regular customers. It is easy to inadvertently access the Inventory Lookup and before you realize it, you have quoted a regular customer at a lower price than normal. To prevent this you can manually click the “Reset To Cash Account” button on the Inventory Lookup dialog. However, you can also set this switch to “R” and BPOS will **automatically** “reset” to the Cash Account every time you access the Inventory Lookup, except, when accessing the lookup from within an invoice. Within an invoice, the customer on the ticket is maintained through to the Inventory Lookup screen.

<**R**>: Reset to store's Cash Account when accessing Inventory Lookup.
Default: < >

27: Appointment Time Increments – This setting determines the times that will display in the appointment time drop down in the Edit Appointments dialog.
You can set this to 5, 10, 15 or 30 minute increments. (Any invalid entry defaults to 30 minutes.)

<A> 5 minutes
<B> 30 minutes
<D> 15 minutes
<F> 10 minutes

28: **AUTO-PURGE FLAG** - **This field is controlled by HITS and should not be changed.** The field is used to indicate that certain processes are either being performed or the system was interrupted while a process was being performed.

<**D**>: A Corporate Daily Closing is being performed or was interrupted.
<**O**>: The Open Invoice Delete routine is being performed or was interrupted.
<**X**>: The Auto-Purge routine is being performed or was interrupted.
Default: < >

29: FORCE the printing of DO NOT PRINT comments on Quotes and Workorders.
<1>: Force printing on Quotes only
<2>: Force printing on Workorders Only
<3>: Force printing on both Quotes and Workorders

32: **Inventory Retain From Scan To Invoice** – If this field is set to "K", if you go directly from an Inventory scan in M/S to an Invoice, the inventory item will be defaulted when you start a line item. Any other entry for this field will be ignored and the item will not be defaulted when you start a line item.

<**K**>: Retains Inventory Item from scan if Invoice line item is immediately started.

35: {reserved BPOS Debug}

42: **ZIP CODE MASTER FILE** - HITS provides a powerful capability for speeding the entry of new customers whereby the entry of a zip code can results in the city and state for that zip code being used as the default for the customer. Additionally, if the zip code entered does not exist in the zip code master file, the entry made for city and state for the new customer can be automatically maintained based on the setting of this option. The use of the zip code master file has three modes; use, disable, use for look up only.

<**D**>: Disable the use and maintenance of the zip code master file.
<**L**>: Use the zip code master file for look up but not to allow automatic updates to the file.
< >: Use the zip code master file for look up and allow automatic maintenance.
Default: < >

LAST INV#: n/a (HITS M/S tracks the last invoice number used in a different method than previous versions of HITS. This is covered further in this topic.)

59: **CROSS STORE INVOICING OF CUSTOMERS** - This option determines if users are permitted to invoice customers who are assigned to other stores. (Some dealers do not allow users at one store to invoice customers assigned to other stores. This is sometimes done to control A/R at the store level.)

<**Y**>: Allow cross store invoicing of customers.
<**N**>: Do **not** allow cross store invoices of customers.
Default: <Y>

Note: If you want your customers to receive **one** monthly A/R statement, you want to set the above option to allow cross store invoicing.

EF#1: This field contains the address of the company to which HITS is licensed. This field is used as part of the license control system and should not be changed.

EF#2: This field contains data used to validate the HITS software license. This field should not be changed.

VALID CREDIT CARD CODES: (Valid credit card codes are set at the store level. Please refer to **Store System** file maintenance.)

STATEMENT DUE DATE: The date entered here is used as the default date for all A/R charge invoice transactions for **all** stores when closing an invoice. This date can be set here each month for the upcoming statement due date. The date can also be updated for the upcoming statement due period at the completion of A/R Aging routine.

NEW INV VALUE: This is the running value of inventory for the **corporation**. It is based on the average cost of each item times the item's true quantity on hand value. It is current as of the last inventory receipt posted and last invoice processed. This value is maintained by the software. Do not change this value without consulting the HTSC.

Note: In the event that the corporate inventory value becomes corrupted, it can be recomputed. To recompute corporate inventory value you must first recompute the value of inventory at each store and then run the program **CORPCAL2**. However, we recommend you contact the HTSC before recomputing either store or corporate inventory value.

CASH OVER/SHORT: This is the running value of the amount of cash over/short for the **coporation**. It is based on the combined overages and shortages posted to the stores via the Deposit function located on the Bookkeeping Menu of each store. It is current as of the last deposit posted and assumes that all store days with receipts, have been closed. This value is maintained by the software. Do not change this value without consulting the HTSC.

A/R AGING AMOUNTS: The following A/R aging fields are the running totals for invoices and ROA postings for the **coporation**. The totals are maintained by the system and should **not** be changed without consulting the HTSC. These fields are maintained by the software.

A/R OVER 90
A/R 61-90
A/R 31-60
A/R 1/30
A/R CURRENT
A/R FUTURE
A/R TOTAL

Note: If you have not already done so, please see the notes that follow the A/R Aging Amounts in the **Store System** file maintenance documentation. Important information is covered in that topic regarding these amounts and how they are maintained.

WARNING: The following fields control the automatic generation of numbers. Do NOT attempt to change these fields without assistance from the HTSC.

- **INV.#**
- **REC.#**
- **CUST#**
- **VEND#**
- **ROA#**
- **POA#**

Note: Immediately following the automatic number generation screen, a screen appears that looks identical to the very first screen in Corporate System File Maintenance. However, please note the **X** that appears in the upper left hand corner of the screen. This screen and the one that follows are used to control options primarily related to **Inventory**, **Purchase Orders**, **Transfers**, and the **Receiving Desk** in HITS M/S. **Only those fields that are currently used will be referenced below. Please disregard all others.** Some fields will only indicate the required entry without explanation. Please confirm that the entries referenced below match the entries on your screen.

X1: **INVOICING - NEGATIVE QUANTITY CONTROL** - This option provides the ability to prevent an invoice from being closed if the invoice would cause a stocking item to fall below 0 (zero) quantity. In other words, this option prevents the selling of stock into the negative. We do not recommend using this option as it will force you to post inventory receipts before the invoice can be finalized. While this is the preferred method, it is generally not practical in the average business.

<**Y**>: Enabled negative quantity control. (Do not allow a sale to take an inventory quantity into the negative.)
<**N**>: Disabled. (Allow an inventory quantity to go negative.)
Default: <N>

X2 : **RECEIVING DESK** - The entry in this field determines which cost will be defaulted when receiving inventory; average cost, dealer base price (replacement cost), or last receipt cost. If dealer base price or last receipt cost is less than or equal to zero, average cost is used regardless of the setting of this option.

<**1**>: Use Dealer Base Price (replacement cost) + F.E.T. as the default if greater than zero. Also displays DBP + F.E.T. at the bottom of the screen.

<**2**>: Same as <1> except user **must** acknowledge a prompt at the bottom of the screen if the Dealer Base Price is zero. This is to remind the user that the item does not have a dealer base price.

<**4**>: Use Average Cost

<**5**>: Use Last Receipt Cost for this item as the default if greater than zero. Also displays Last Receipt Cost at the bottom of the screen.

<**6**>: Same as <5> except user **must** acknowledge a prompt at the bottom of the screen if the Last Receipt Cost is zero. This is to remind the user that the item does not have a Last Receipt Cost.

Default: < >

Note: The following fields, **#X10-#X14**, determine if transaction files are maintained for various master files. Generally, there is no reason to change these defaults and we recommend that you do not change them without first contacting the HTSC.

X10: **INVENTORY MASTER TRANSACTION TRACKING** - This option controls whether **daily** and **monthly** transaction files are maintained for the **inventory master** file by HITS.

<**Y**>: Maintain daily and monthly transaction files.
<**N**>: Do not maintain daily and monthly transaction files.
Default: <Y>

X11: **INVENTORY CHILD TRANSACTION TRACKING** - This option controls whether **daily** and **monthly** transaction files are maintained by HITS for the **inventory child** file.

<**Y**>: Maintain daily and monthly transaction files.
<**N**>: Do not maintain daily and monthly transaction files.
Default: <Y>

X12: **MECHANIC TRANSACTION TRACKING** - This option controls whether **monthly** transaction files are maintained by HITS for the **mechanics** file.

<**Y**>: Maintain daily and monthly transaction files.
<**N**>: Do not maintain daily and monthly transaction files.
Default: <Y>

X13: **CUSTOMER TRANSACTION TRACKING** - This option controls whether **monthly** transaction files are maintained by HITS for the **customer** file.

<**Y**>: Maintain daily and monthly transaction files.
<**N**>: Do not maintain daily and monthly transaction files.
Default: <Y>

X14: **SALESMAN TRANSACTION TRACKING** - This option controls whether **monthly** transaction files are maintained by HITS for the **salesman** file.

<**Y**>: Maintain daily and monthly transaction files.
<**N**>: Do not maintain daily and monthly transaction files.
Default: <Y>

X23: **DECLINED OPTIONS** - This option controls what prints on the customers invoice when you mark an item declined.

< >: Declined

<**R**>: Recommended
<**S**>: Suggested
Default: < >

X39: **Print Prices On Open Receipts** - This option controls whether or not prices will print on OPEN receipts.

< >: Prices will NOT print on OPEN receipts
<**Y**>: Prices will print on OPEN receipts
Default: <Y>

X49: **Activate Report Group System** - This option controls whether or not the Report Group grid is activated. The Report Group system provides the ability to assign “groups” of reports to specific users with a single group designator A-J. If not activated, all reports are available to all users.

< ! >: Report Group system active
Default: < >

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