HITS®
BPOS

HITS® Point-of-Sale Manual

PDF Guide on Invoicing, Transfers, and End-Of-Day processes in the point-of-sale. Access this PDF digitally or watch video at:

peerless.hitshelp.com

Created for:

Peerless Tires 4 Less

Peerless
TIRES 4 LESS®

Version 21.0806
Last updated Aug 6th, 2021

Table Of Contents

1. Login & Access

The HITS Point-of-Sale system is cloud-based. This means that data within the point-of-sale is "real-time". Inventory quantities, customer history, and reporting is live across the entire corporation within seconds.

HITS can be accessed from any Windows computer that has been given security permission to access it.

To open the HITS Point-of-Sale, click the HITS BPOS icon on the desktop.
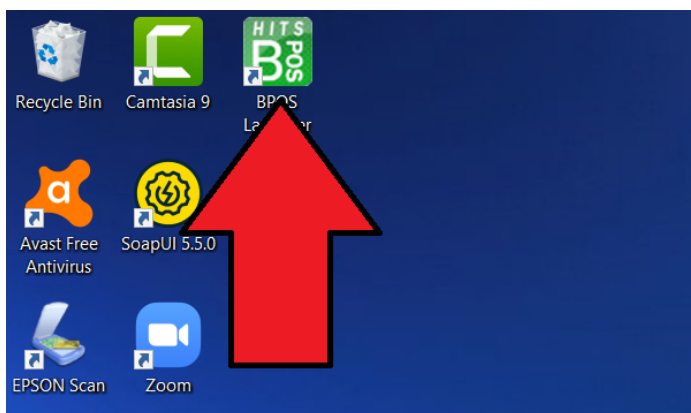
Enter the **Username** and **Password** provided by your Manager/ Corporate. Keep in mind that the password will require CAPS LOCK on your keyboard.

Make sure to leave the **Do Not Exit Launcher After Login** selected.

In the rare event the HITS Point-Of-Sale were to freeze or get locked, as long as you can access the Launcher, you can click the **Close BPOS** button to force the Point-Of-Sale to close, so you can restart it.
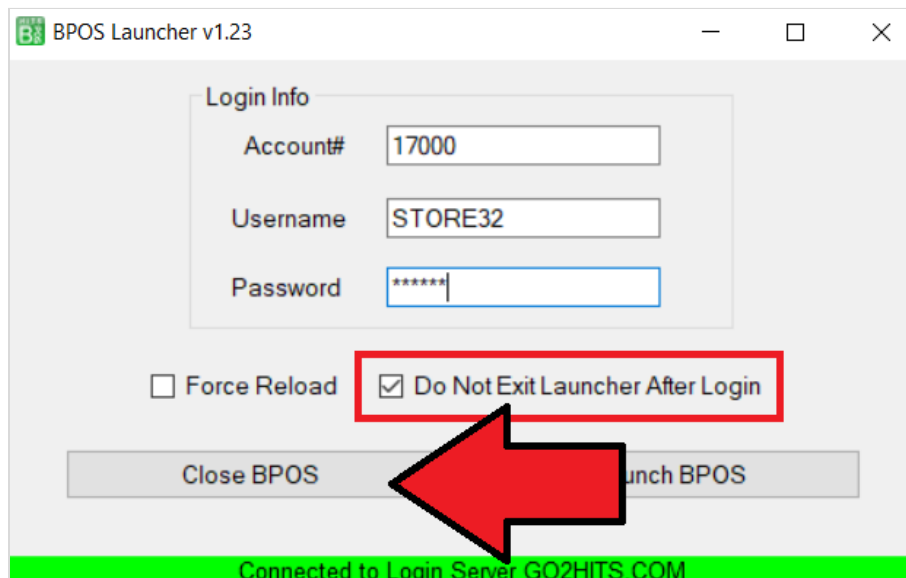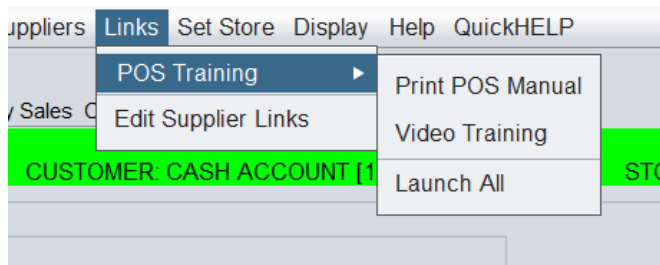

VERY IMPORTANT !!

HITS has different "Views" for different areas of the business.

If you ever get lost in a "View", where you are not familiar with the menu options, click the **HOME** button (*upper left hand corner)* to return to the **Sales Counter/ Ticket Lookup Screen.**
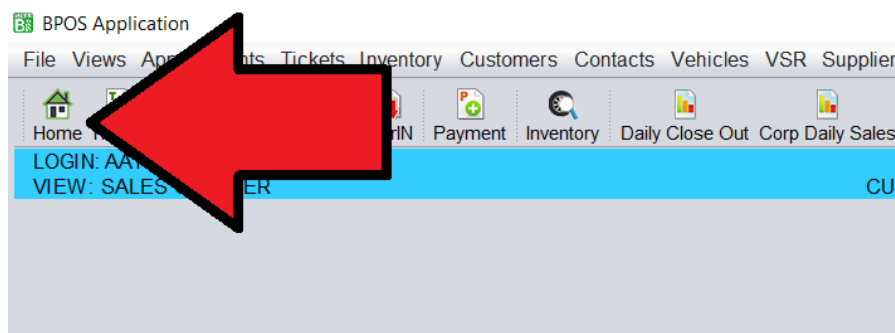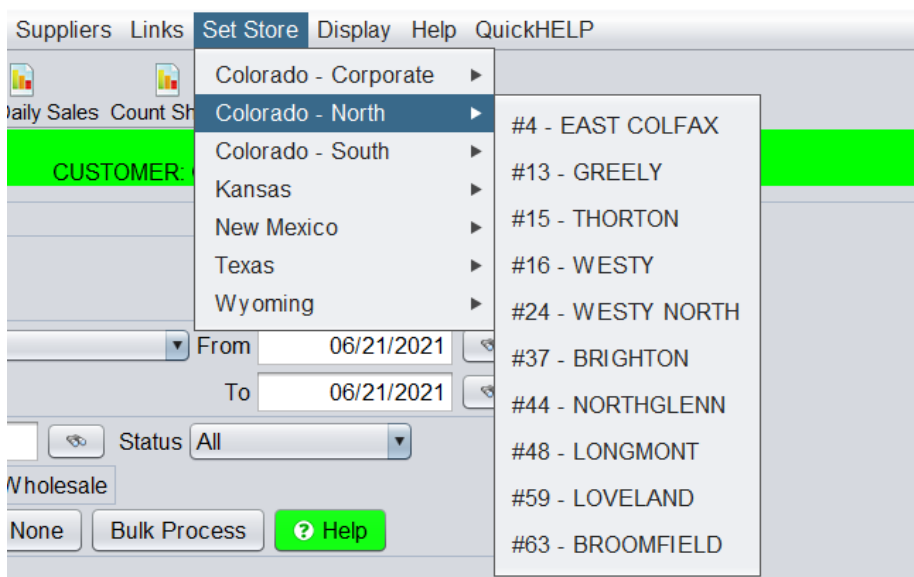
A current version of this training can always be found from the **Links** menu.


Store users will only be able to login to their store.

District Managers and Corporate Office users will be login to different stores within the organization from the same login name. To change stores, from the top menu, select **Set Store** and select the store you are attempting to access.
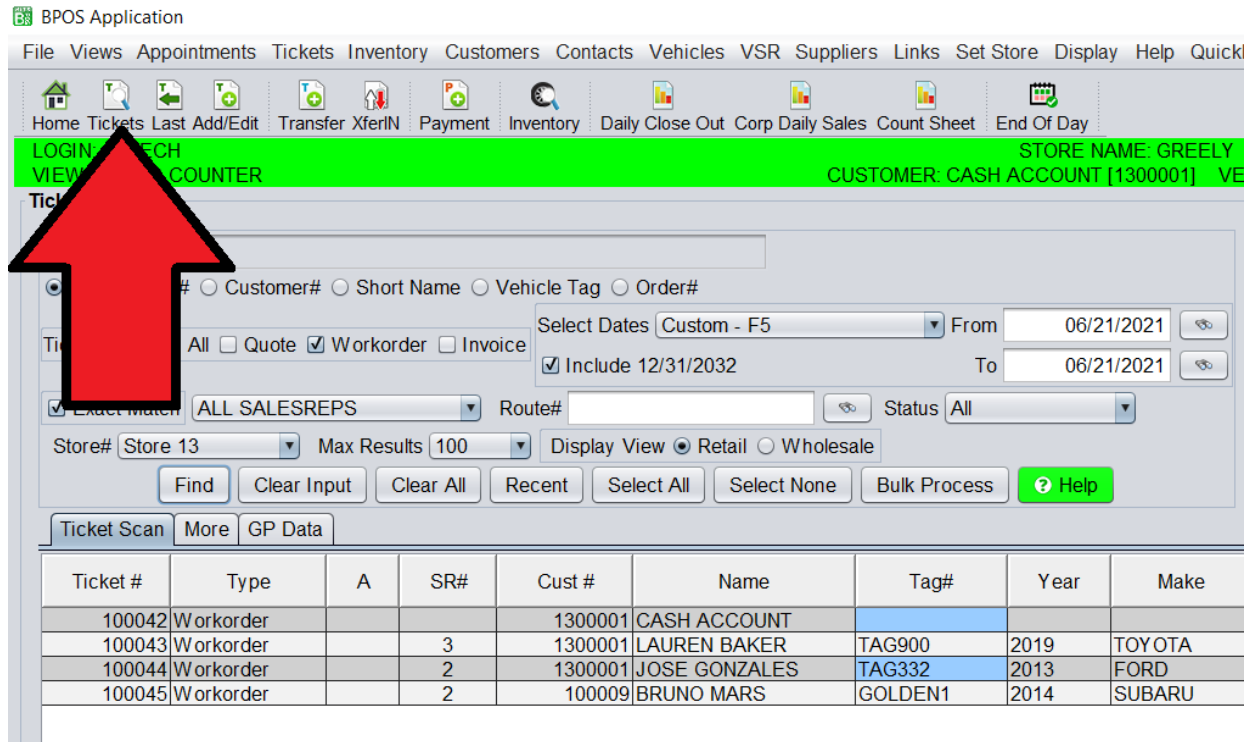

Based on your monitor size, changing the text size under the **Display** option may make the screen easier to read:
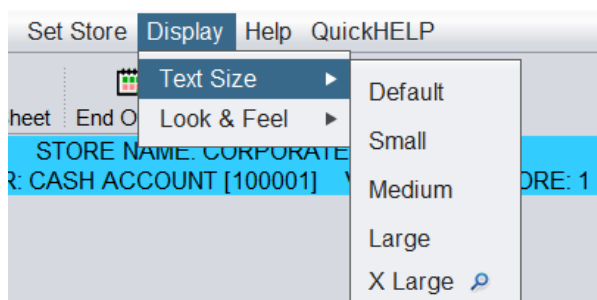
1. Tickets (Workorders, Quotes, Invoices)

When you log into HITS, the first screen you will likely click on is the **Ticket Lookup** screen.

The Ticket Lookup screen can be used to see all the Workorders, Quotes, and Invoices for a date range. In HITS:

- **Quotes** are OPEN tickets that can be provided to the customer for pricing. Products on Quotes do not allocate items out of inventory. If the customer decides to go forward with work, Quotes can be converted to a Workorder using the **Convert** button on the button of the ticket.

- **Workorders** are OPEN, in-process tickets that have not yet been "cashed out" or closed for the customer. Products on Workorders will allocate items out of inventory. Once Workorders are "cashed out" and closed, they become Invoices.

- **Invoices** are CLOSED tickets that have been "cashed out" for the customer.

The Ticket Lookup screen, in addition to showing you the sales tickets, will also show you **Gross Profit $** and **Gross Profit %**.
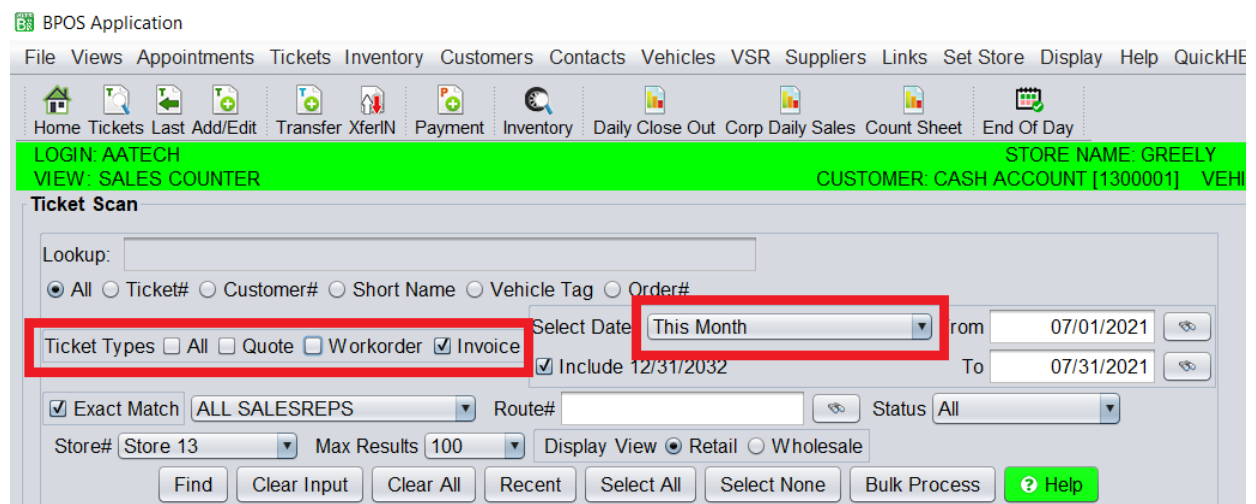
To see Gross Profit for different date periods (example: THIS MONTH), you can change the date period and ticket type (Invoices only) on the Ticket Lookup screen and click **Find**.

VERY IMPORTANT!!
The gross profit numbers in HITS are estimated and not final.

Usually, true accounting numbers vary slightly from the gross profit reporting in HITS. This can be due to edits, adjustments, or bills that are entered directly into the accounting system and not into HITS.

The gross profit numbers in HITS can be used as a **guide** to advise if your day/ week/ month is on track, but be sure to always validate final profitability numbers with corporate reports.
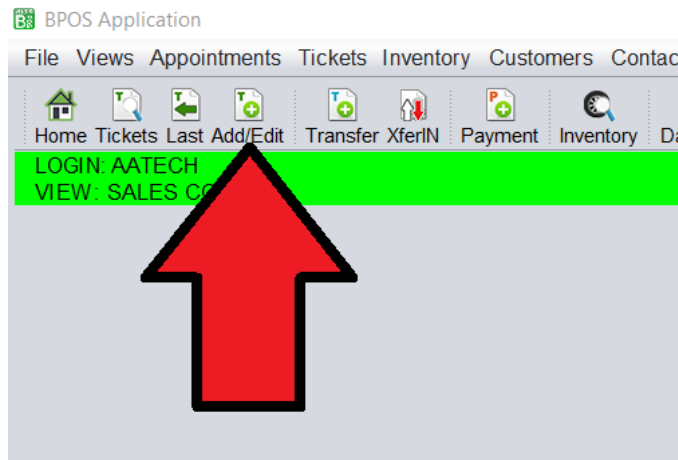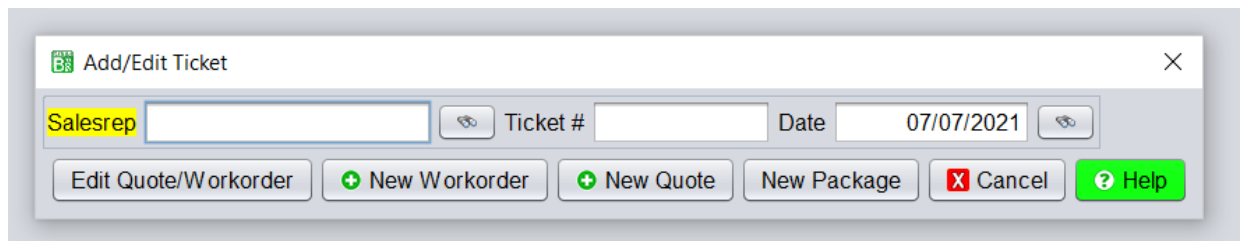
---

1. Invoicing

A. Starting a new sale

To start a new Workorder (or Quote), click the **Add/Edit** button.

(This option can also be used to retrieve and edit a Workorder by entering the Workorder # when prompted.)

1. Enter your Salesrep ID
2. Click the **New Workorder** button

When the new Workorder is started, click to **Select Different Customer** or to **Select Different Vehicle.** It is usually best to lookup by the customer, unless you already have the vehicle's License Plate Tag#.

B. Customers

After clicking the **Select Different Customer** button**,** the system will ask you to look up the customer.

It is always important to ask the customer:
"Have you been to a Peerless Tire store before?"

- If they are a returning customer, you will **look up the customer**.
- If they are a new customer, you will **add the customer** in the system

Lookup the customer
Type in your search and hit ENTER or click FIND, and then click on the correct customer to add them to the Workorder.

You can look up the customer by:

- Short name (usually last name or business name)
- Full name (first and last name)
- Phone number
- Last 4 Digits phone number
- Email

Adding a customer

If the customer is a new customer, click the **Add Customer** button on the Customer Lookup screen.

This will allow you to add the customer, their address, and contact information. Once entering the required information, click **Save.**
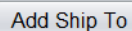
Customers are saved and viewed across the entire corporation.

This means a customer could have visited another Peerless Tire store before coming into your store. You will be able to view the customer's history (Invoices) for all stores, even if the vehicle was not previously serviced in your store.
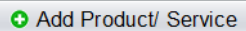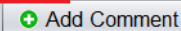
C. Vehicles

Once you have added the customer to the Workorder, click the lookup button next to the **Tag#** field, to see all vehicles in the system for the customer.
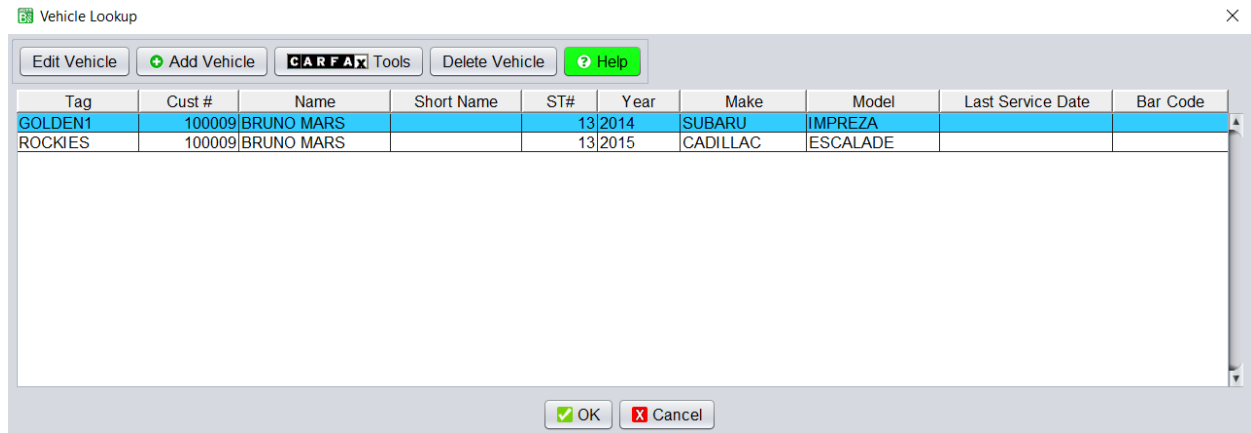
If the vehicle being serviced is in the system, select the correct vehicle:
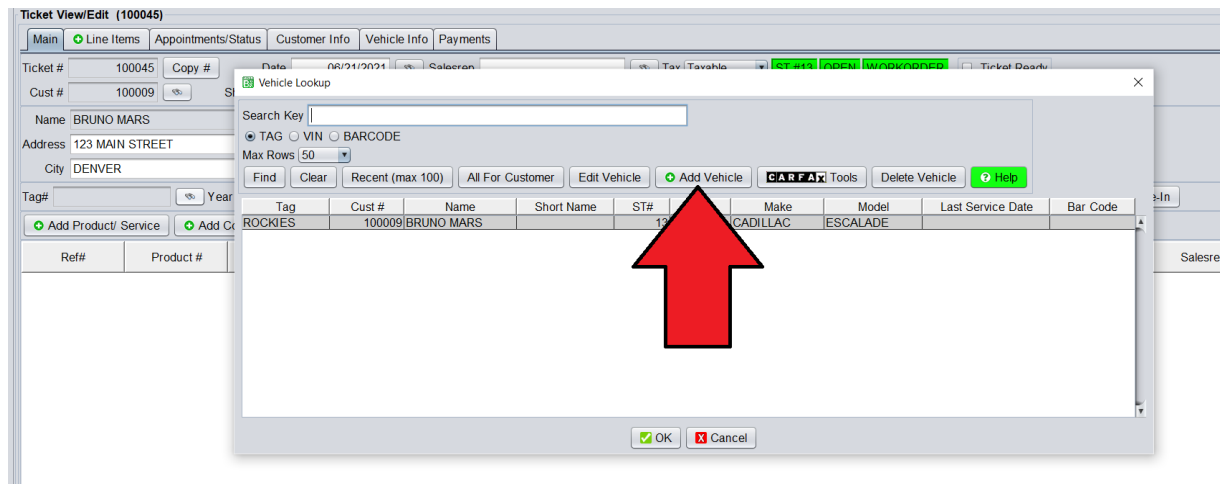
If the vehicle being serviced has never been to Peerless Tire, or if this is a new customer (who does not have any vehicles in the system), click the **Add Vehicle** button.

To add the vehicle, type in the License Plate Tag# and click the **CARFAX** button.

CARFAX will return the vehicle's year, make, mode, and engine.
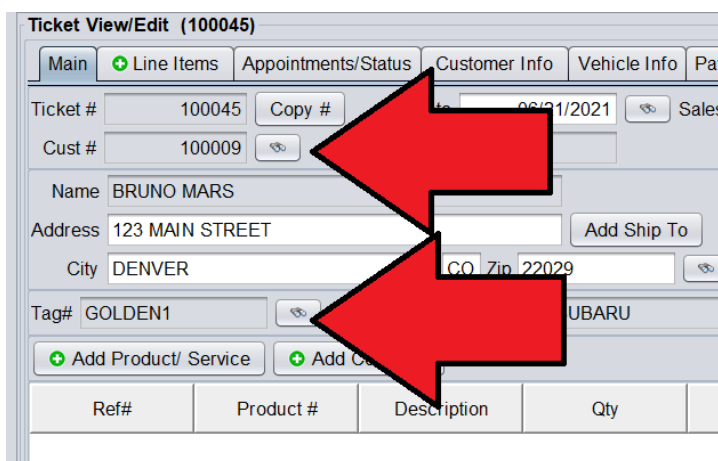
Click **Save** to add the vehicle into the system and onto the Workorder.

While invoicing the customer, if the customer or vehicle needs to change, click:

> Lookup button next to the **Customer #** field to change the <u>customer</u>.

> Lookup button next to the **Tag#** field to change the <u>vehicle</u>.

Prior to closing out the Workorder for the customer, you will be required to enter

In the current mileage of the vehicle. The current mileage can be entered onto the MAIN tab of the Workorder.

IF the mileage has not been entered prior to closing/ cashing out the Workorder, you will prompted at time of closing to enter the current mileage.

NOTE ON CARFAX:

Because CARFAX makes the adding of vehicle information so simple, it often best to get the License Plate Tag# from the vehicle **FIRST** before adding the vehicle in the system. Thus, getting the Tag# from the vehicle can be done during the parking lot carside inspection process at check in.

In rare occasions, if CARFAX does not return the year, make, and model, this information will need to be manually entered.
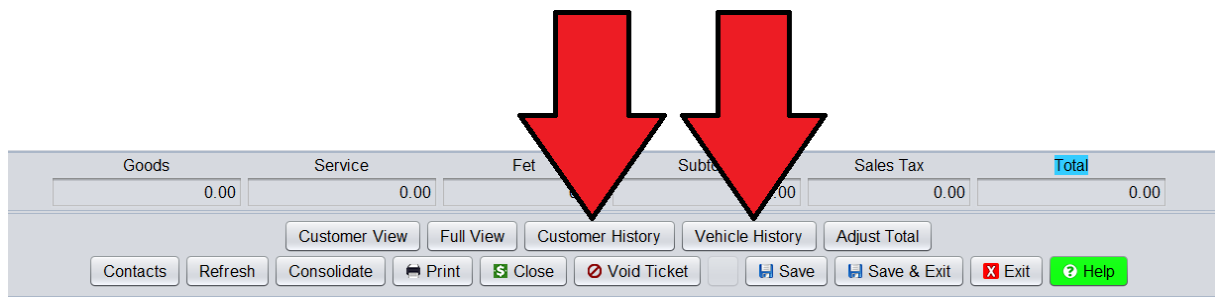
To save a vehicle in the system, you MUST enter the License Plate Tag#.

D. History

The system allows you to view customer and vehicle history (Invoices) across the entire organization.

> Click the **Customer History** button to see all of the customer's Invoices.

> Click the **Vehicle History** button to see all Invoices for the specific vehicle.

Once you are viewing the customer's history, each Invoice will be separated by a black background row. You can click on a black background row to open that Invoice.

E. Products & Services

After you have started a Workorder, you will be adding products and/ or services to the Workorder. To add products and/or services:

> Click the **Line Items** Tab **OR**

> Click the **Add Product/ Service** button (on Main Tab)

If you know the article number/ product number of the item you are adding to the Workorder, you can type it in.

If you do not know the article number/ product number you are adding the Workorder, you can click the:

1. **Inventory Lookup** button to lookup inventory across the organization

2. **Codes & Services** lookup button to see a list of services and generic product codes

Once you have found the article number/ product number to add to the ticket, there is some additional information you may need to edit within the product edit box. Once you are done editing any information, click the **Save** button.

Tire Sales

When a tire article number has been added to the Workorder, you will have the ability to change the **tire package that is being sold with the tire.**

Most often, this will be for deciding if the tire is being sold with a road hazard warranty or without the road hazard warranty.

Always make sure to select the correct package that is being sold.

!! DO NOT delete the road hazard line item off the road hazard warranty tire package, instead, if the customer has declined the road hazard warranty, change the package to the basic **Tire Install** package.

Other services and product codes
To see a list of non-inventory service and generic products, click the second button next to Product #:

This will show a list of services and generic (non-inventory) products.
You can click on an item to add it to the Workorder.

Product #	MFG	Size	Description	Qty St	Qty Corp	Aux	Price w/FET	GP%	Warranty	Side Wall	Load Index	Speed Rate	UTQGL	Tread Depth	PIC	CUST Days	Item Days
OPT		OUTSIDE	PURCHASE TIRE											0.00			9
OPW		OUTSIDE	WHEEL											0.00			107
1---		-------------	----------------------------											0.00			
TLABOR		TIRE LABOR					115.00	100						0.00			7
TIRE3		TIRE REPAIR					20.00	100						0.00			107
TIRE2		TIRE REPAIR	(NO CHARGE)											0.00			
TIRE6		TIRE ROTATION					20.00	100						0.00			9
TIRE7		TIRE ROTATION	(NO CHARGE)											0.00			
TIRE8		TIRE BALANCE					10.00	100						0.00			9
TIRE9		TIRE BALANCE	(NO CHARGE)											0.00			
RR PKG		PACKAGE	REPAIR & ROTATE				55.99	100						0.00			
2---		-------------	----------------------------											0.00			
OPP		OUTSIDE	PURCHASE PART											0.00			9
OPD		OUTSIDE	DEALER PART (OE)											0.00			
OP_CORE	P96	CORE												0.00			
3---		-------------	----------------------------											0.00			
ALIGN		SERVICE	ALIGNMENT				75.00	100						0.00			9
SLABOR		SERVICE	GENERAL LABOR				115.00	100						0.00			
4---		-------------	----------------------------											0.00			
MIS	P96	MISCELLANEOUS												0.00			
SNAP		SNAP FINANCE												0.00			10

After making any edits to the service or product, click the Save button to add it to the Workorder.

Line #	Product #		Description	Unit Cost w/FET
0	TIRE3	👁 🔲 🕐	TIRE REPAIR	0.00

Flag Time	Quantity	Price Code	Unit Price	Unit FET	Tax Code	Amount
0.00	1.00	2 - Price 2 ($20.00) ▼	20.0000 🔲	0.00	0 - No Tax ▼	20.00

Technician	Salesrep	Dept	Package
-13 - HOUSE 👁 🔲	4 - DAGEN S. 👁	5 - WHEELS ▼	No Package Selected........ ▼ 👁

💾 Save | Adjust Items | Kit Price | Add Separator | Set Tech | Set Sales | Set Vendor Info | Item History | Return Goods | Toggle Declined | Show Vendor | Item Audit | Authorize Work | 👁 Tire Fitment | Clear

F. Comment

If you need to add a customer comment or technician comment to the ticket, you can either:

> Click the **Add Comment** button (from the Main tab)

OR

> Right-click in ticket body and select "**Append Comment**" (from Line Item tab)

G. Special Orders / Outside Purchases

To sell a Special Order tire/ part, use the following article numbers/ product

numbers when adding products to the Workorder:

OPT	Outside Purchase Tire
OPW	Outside Purchase Wheel
OPP	Outside Purchase Auto Part
OPD	Outside Dealer Auto Part (OE)
OP_CORE	Core charge

The system will require that you enter the:

- **Cost**
- **Vendor**
- **Vendor Invoice #** (If you have taken advanced payment from the customer and do not have a Vendor Invoice # at time of the sale, enter "DEPOSIT" in this field).
- **Vendor Invoice Date**

You must enter this information prior to cashing out/ closing the ticket.

VERY IMPORTANT !! When placing an order with a vendor (example. ATD, USAutoForce, NAPA, etc.) **always use the HITS Workorder # as the PO#.**

You can use the **COPY#** button to copy the Workorder # to the clipboard, so you can easily paste it on the vendor's website when ordering.
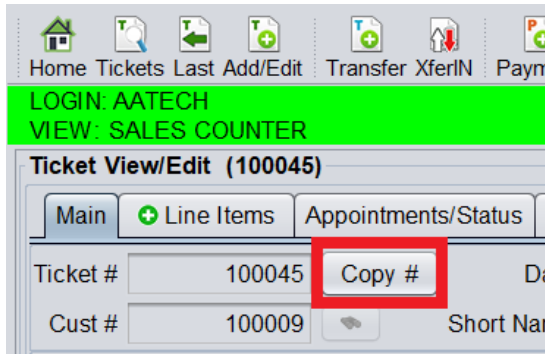
H. DOT#s for Tire Installations

When selling tires, the system will require that you add the DOT # to the Workorder. This will allow the customer to complete the registration process for their tire purchase.

> To add DOT#s, **right-click** on the tire sold, and select **DOT Registration**
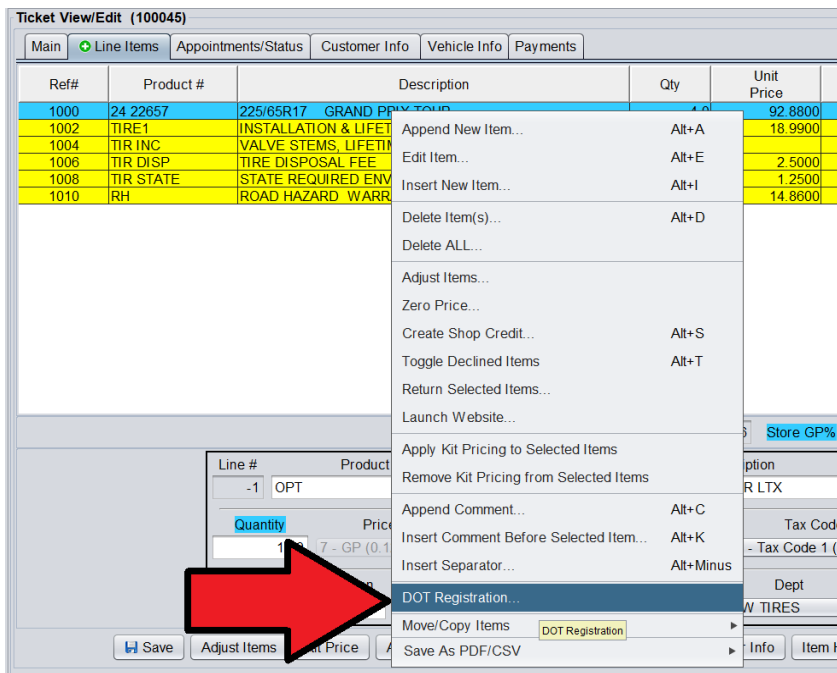
Enter the DOT#s and the number of tires for each DOT#. When done click the **Add DOT Entries** button.

I. Warranty Adjustments

If a customer comes in for a warranty adjustment, first verify that the tire is valid for road hazard warranty adjustment claim.

Once you have verified that tire is valid for adjustment and have located the replacement product and price, you can determine the adjusted replacement price on: **tire-warranty-calculator.com**

Calculate By Mileage

Manufacturer Mileage Warranty:

60,000

Miles Obtained:

32,400

Percent of Mileage Received:

54.00%

Replacement Price:

92.88

Calculate

Download Mileage Warranty Chart (PDF)

Discounted Price:

$50.16

Price is discounted by the % of the Mileage Received.

Once you have calculated the discounted adjustment price of the new tire from Tire-warranty-calculator.com:

1. From the **Line Items** tab of the Workorder

2. Highlight the replacement tire and click the **Adjust Items** button

3. Select the Discount Type: **Warranty Adjustment (PCD!WA)**

4. Enter the discounted **Target Price**

5. Click **Adjust Price For Selected Items.**.

** For non-warranty adjustments use code: (PCD!WAN) Non-Warranty Adjustment **

J.   Discounts and Coupons

To apply a discount or coupon to the Workorder, click the:

>> **Adjust Total** button - to apply discount to entire ticket

>> **Adjust Items** button - to apply discount to specific items

When applying discount to multiple items (some discounts can only be applied to products, not services,) hold down the **CTRL** key on your keyboard to select the multiple items that you are applying discount to.

After clicking the **Adjust Items** or **Adjust Total** button:

Select the appropriate discount, coupon, or adjustment code from the dropdown menu and click the **Adjust Price** button.


This will add the discount line to the Workorder.
This line can be deleted if the discount needs to be removed or re-applied.


K. More functions

There are a number of other helpful tools accessible from the **Line Items** tab of the Workorder, such as moving line items, deleting line items, etc.

These additional functions can be located by **right-clicking** on your mouse from the body of the Workorder.
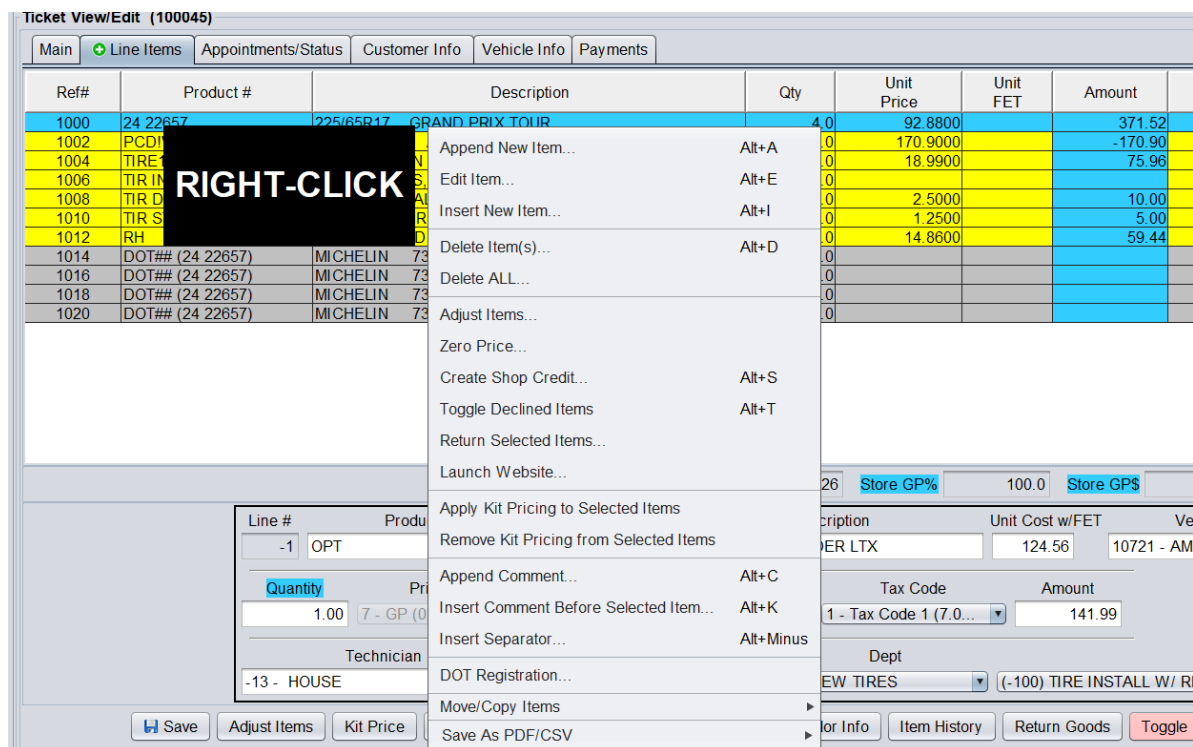
L. Cashing Out/ Closing Invoices

To cash out the customer and close the Workorder, go to the **Payments** tab.
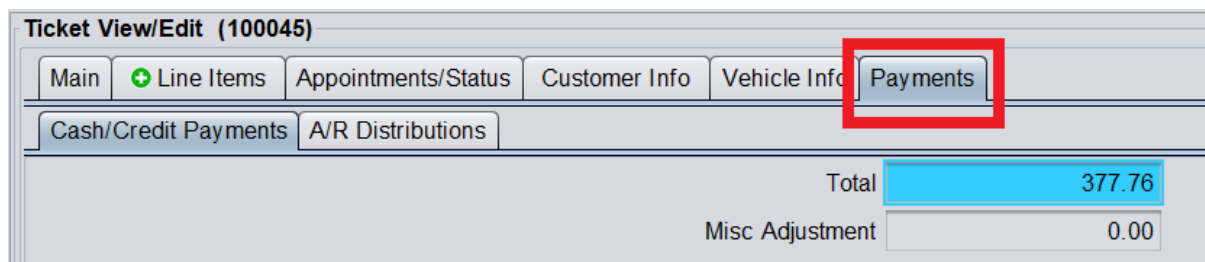
From the Payments tab, you can enter the customer's payment type.

> If the customer pays with **Cash**, enter the cash amount paid.

> If the customer pays with **Credit Card**, select the correct credit card from the drop down menu.

> If the customer pays with a **finance option**, select the correct type from the drop down menu.

The customer can pay with multiple (split) payment types.

As an example, if the customer paid an online deposit for tires through Tire Connect ($50.00); paid cash ($200); and put the rest on a Visa credit card ($278.12), the payments would be noted like this:

If the customer is a commercial customer "on account", the Payments tab will default to the A/R Distributions sub-tab, where you can proceed to click the **Apply Customer's Default Payment Terms** button to charge to their account.

Once you have applied payment, the **Balance Due must = $0.00.**

Once the Balance Due = $0.00, you can click the **Close** button on the bottom on the screen to close the ticket and print out the Invoice for the customer.
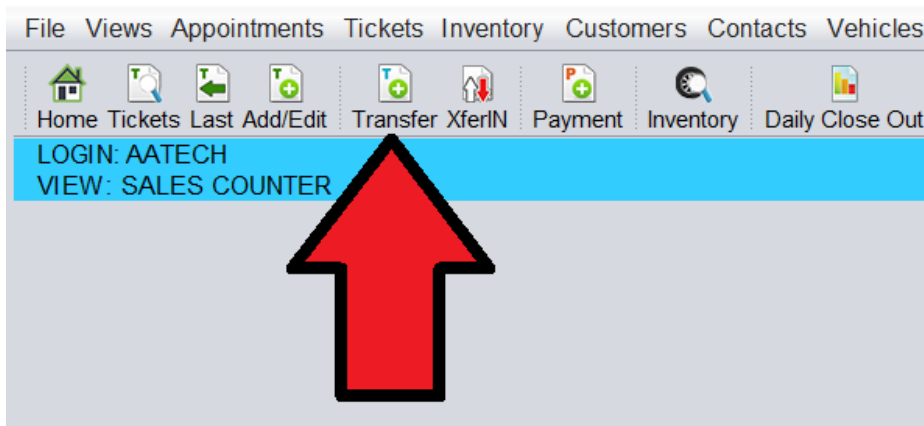
4.   Create Transfer

In HITS, stores can transfer inventory to other stores.
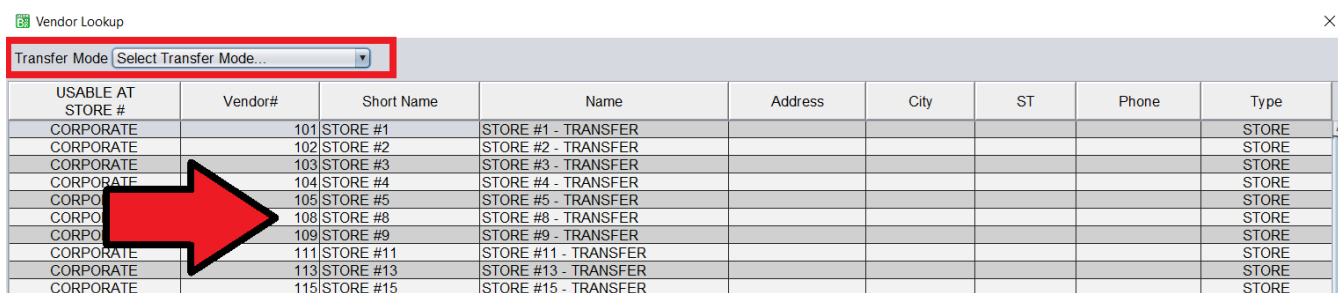
!!! The transfer must start at the <u>OUTBOUND</u> STORE.

Outbound Store
Click the **Transfer** button on the top toolbar.

1. Select **Transfer Mode:** OUTBOUND
2. Select the Store you are transferring products **to**.

Once the Transfer ticket has been created, click the **Add Product/ Service** to enter the product and quantity you are **transferring out.**
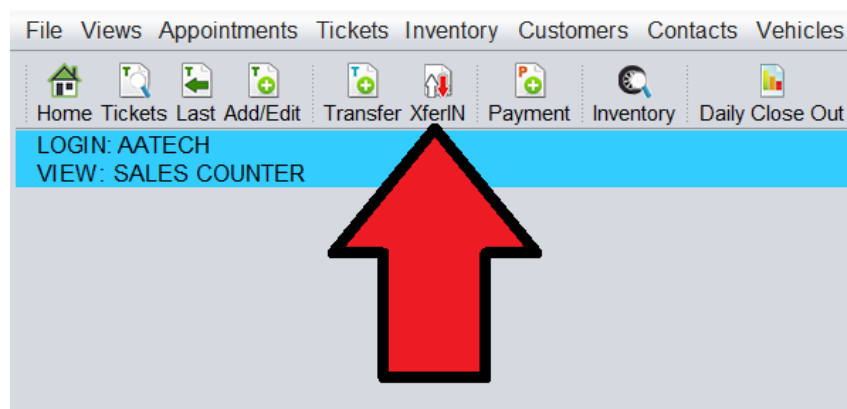
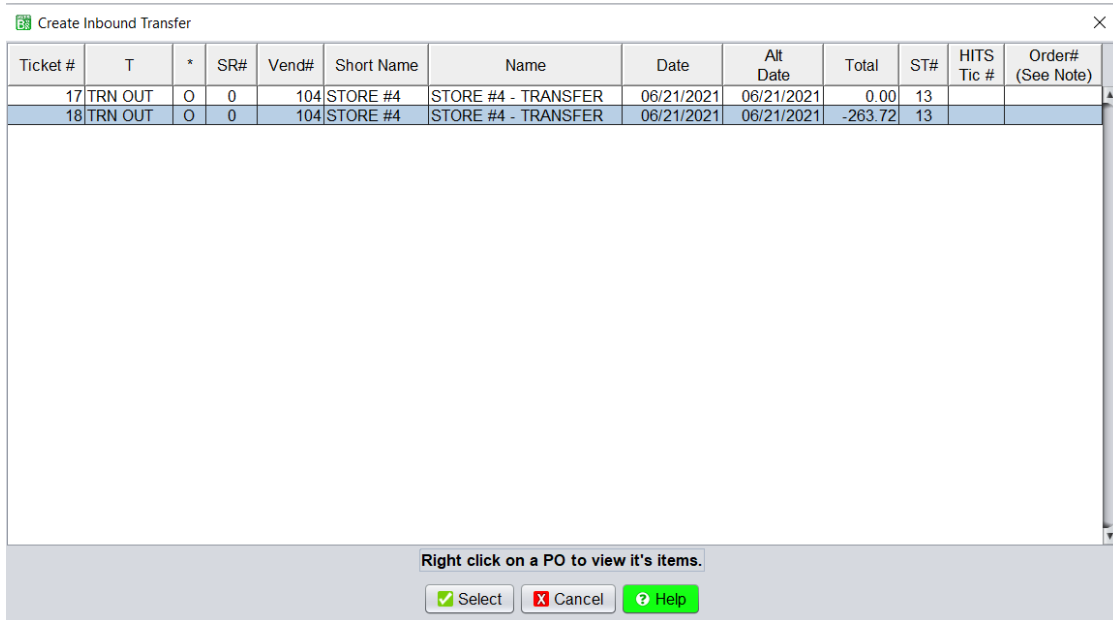After adding products to the transfer ticket, you can exit the ticket.

Inbound Store (Receiving Transfer)

When the physical transfer arrives at the inbound store, to accept the transfer at the Inbound store, click the **XferIn** button on the toolbar.

Select the transfer ticket you are receiving from the list that pops-up..


Verify all items have been received.

1. To finalize the transfer, click the **Close** button on the bottom on the screen.

2. You will be required to enter the **Reconciling Ticket #** which is the ticket # of the transfer you received from the other store.

3. After entering the reconciling ticket #, click **OK** to finalize the transfer at your store as well as the other store.
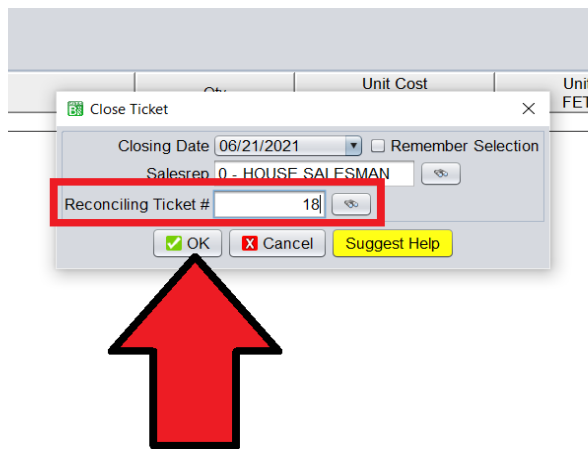
5. Create ROA (Payment On Account)

Some commercial customers may have an account on file with Peerless Tire. These commercial accounts can make payments on their account in the store.

To post a payment for a commercial account making a payment in the store, click the **Payment** button on the top toolbar.
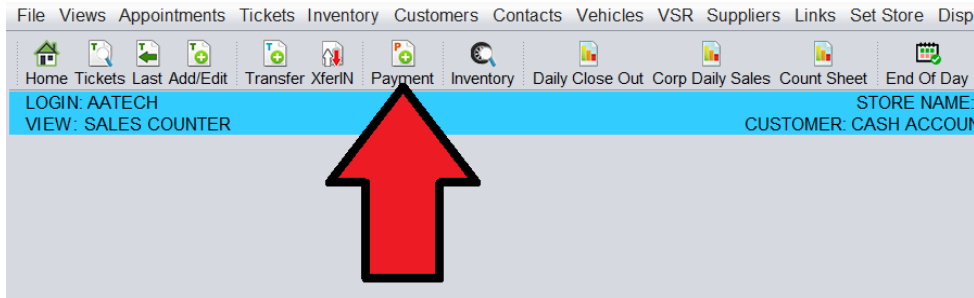
1. Click the **lookup button** to add the customer making a payment.

2. Enter the: **Amount**

3. Enter the **Payment Type**

4. Enter the **Check#** (if applicable)

5. Click **Create Payment**

6. Once the payment has been created you can **Print** a payment receipt for the customer.

7. When done, click **Exit.**

6. End Of Day

At the end of the day, click the **End Of Day** option on the top toolbar.
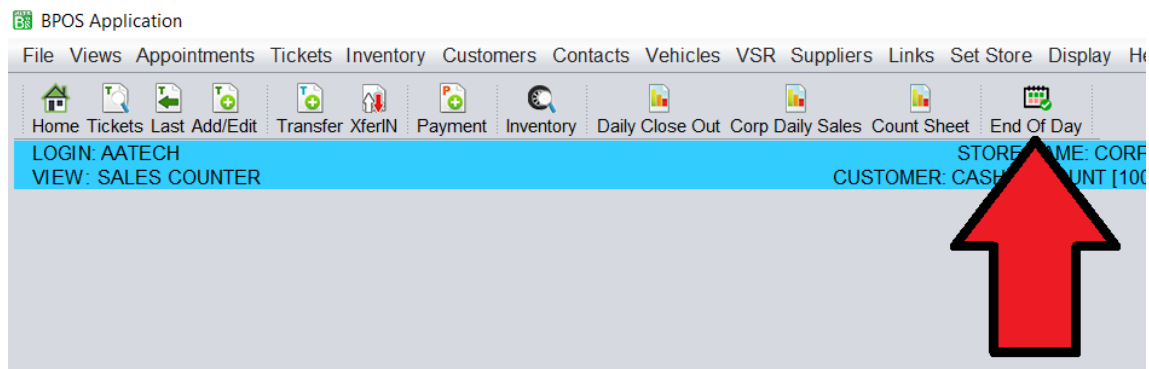
Confirm each payment and card type is showing the correct totals.

Enter in the **deposit** being made as well as ending **cash in the drawer**.

Click the **Post Deposit** button.

Before or after posting the deposit for the store, you may want to run either the

Daily Close Out report or the **Corporate Daily Sales** report to check your sales and payment totals.
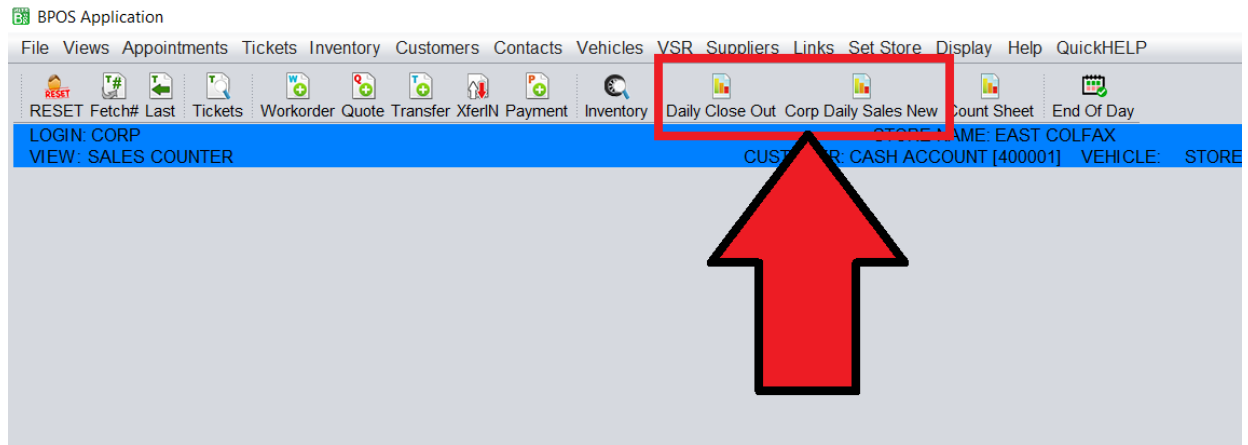
Note!! Be sure to follow all closing procedures outlined by Peerless Tire Corporate. Certain processes like **scanning** receipts and deposit slips may occur outside of the HITS point-of-sale.

7. Physical Inventory Counts

To print out a physical inventory count sheet, click the **Count Sheet** report option from the top toolbar.
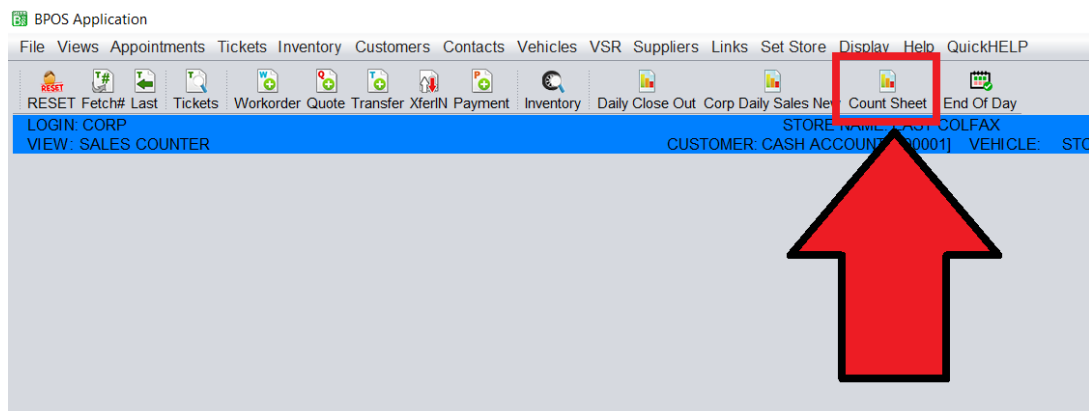
1. Select to **Sort By:** <u>Size</u>, then <u>Manufacturer</u>

2. Click to include **Positive Qty** and **Negative Qty**,

3. **Run Report**

This will print out a physical inventory count sheet where you can verify your quantities on hand.

Count Sheets Report   Date: 06/21/2021 Time: 2:57 PM   Page: 1

Store #4 - EAST COLFAX

Mfg	Product #	Rawsize	Size	Description + Mfg#	Style	Available	Count	WIP	RIP	TIP	OIP	True	Dept
	DOT##												
	*	COMMENT	COMMENT										
	TEMPLATE-1												1
	OPT	OPT	OUTSIDE	PURCHASE TIRE									1
BRS	98 1764	1756514	175/65QR14	BLIZZAK RADIAL	EF								1
BRS	98 1864	1856514	185/65QR14	BLIZZAK RADIAL	EF								1
BRS	38 1865	1856515	185/65R15	ECOPIA EP422	BI								1
BRS	98 1865	1856515	185/65QR15	BLIZZAK RADIAL	EF								1
BRS	38 195	1956015	195/60R15	ECOPIA EP422	BI								1

You are responsible for performing your store's physical inventory.

Report any variances to your District Manager at the end of the month.

Your District Manager will be **on-site to audit** your physical inventory 2-4 times per year.