

File Maintenance (Service Utilities)

In RSSS, Maestro or Maestro SBE you can access File Maintenance off the Main Service Department Menu.

Configuring the System

Certain procedures must be followed in order to configure the software for general use. Detailed explanations of each procedure are found here in the File Maintenance section and Document Maintenance section.

Suggested steps to follow during the setup procedure are:

1. [Create a base company.](#)
2. [Make the base company the current operating company.](#)
3. Setup system-wide defaults for service explained in this chapter.
4. Create all necessary master records for service explained in this chapter.
5. [Setup document printing.](#)

File Maintenance provides the means for entering most master records that are used throughout the software. The File Maintenance (Service Utilities) Menu is displayed in Figure 13-1.

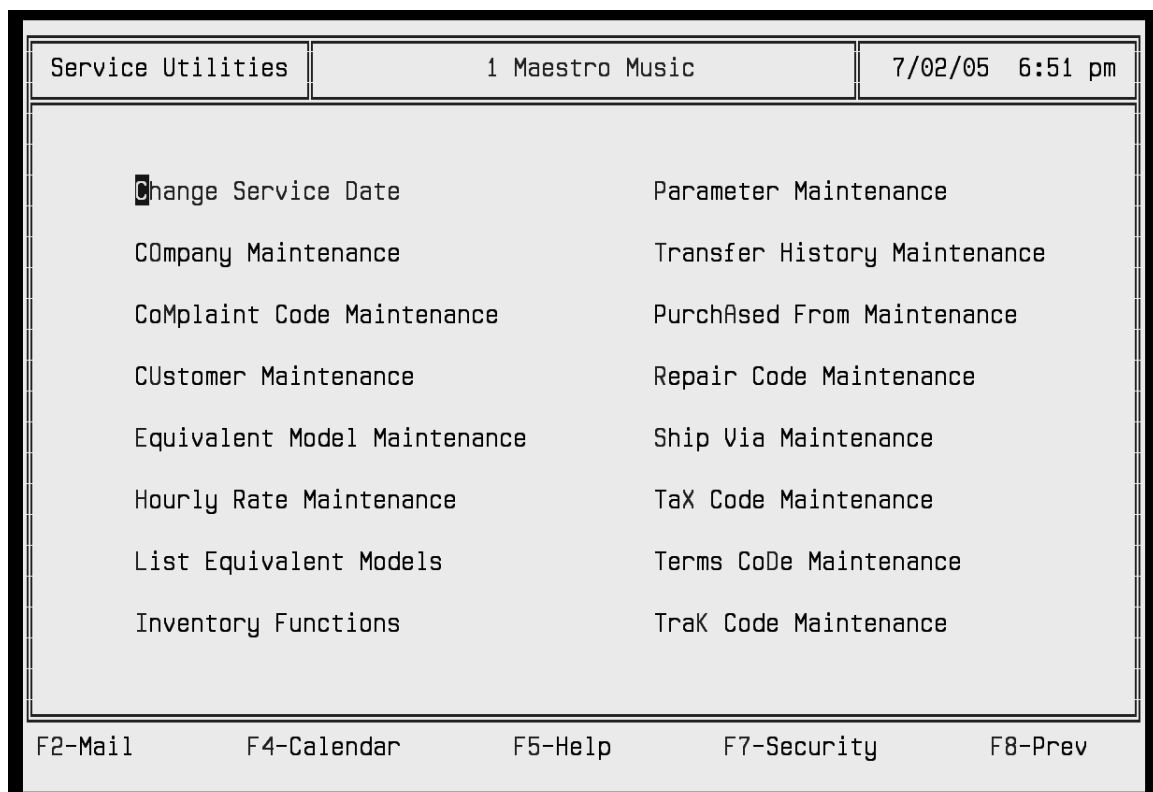


Figure 13- 1 File Maintenance – Service Utilities Menu

File Maintenance options include:

- Adding master records
- Changing existing records

- Deleting obsolete records
- Listing all records
- Printing reports of records contents
- Showing individual records
- Lookup windows with add, change and delete capabilities available to assist in maintenance of records
- System wide parameter maintenance available from any module

This following section explain the items identified on the menu displayed in Figure 13-1.

Change Service Date

It might be necessary to change the service date on a ticket after it has been processed. Use the option “Change Service Date”. This process allows you to change the service date. You select the ticket like you would any other process.

Once the ticket is selected, a window will be displayed where you can enter a new service date. See Figure 13-2.

Chg Service Date	1 Maestro Music	7/02/05 6:56 pm
Customer: 501433 ABBOTT DEIRDRE 131 WALMAR DR ANYTOWN TX 55555-0000 Phone:(555)555-5555	Bill to: 501433 ABBOTT DEIRDRE 131 WALMAR DR ANYTOWN TX 55555-0000 Phone:(555)555-5555	
Ticket Number: 1563.00 Status: Deleted Emp: 1 Called In: 6/08/05 Store: 1 Maestro Store 1 Trak: COMP Comp Date: 8/08/05 Complaint Code: N/A Serial Nbr: 00030308 Se		
Model Number: Brand Name: EPI EPI Description: GUITAR ELECTRIC Estimate: No Deposit: 0.00 Purchased At: 1 Date: 8/11/00 Tech: 000007		Service Date: 6/08/05 Notes: Warr: Narda:
SERVICE PROBLEM CONTACT CUST WITH ESTIMATE FOR APPROVAL. SHE MAY NOT WANT TO REPAIR		
Input the serviced date for this ticket		

Figure 13- 2 Change Service Date Screen

Company Maintenance

The Service Department system refers to a financial entity as a company. This entity can be segregated into multiple subordinate entities referred to as profit centers. It is necessary to have at least one company defined. This company must have at least one subordinate profit center in order to utilize the General Ledger software.

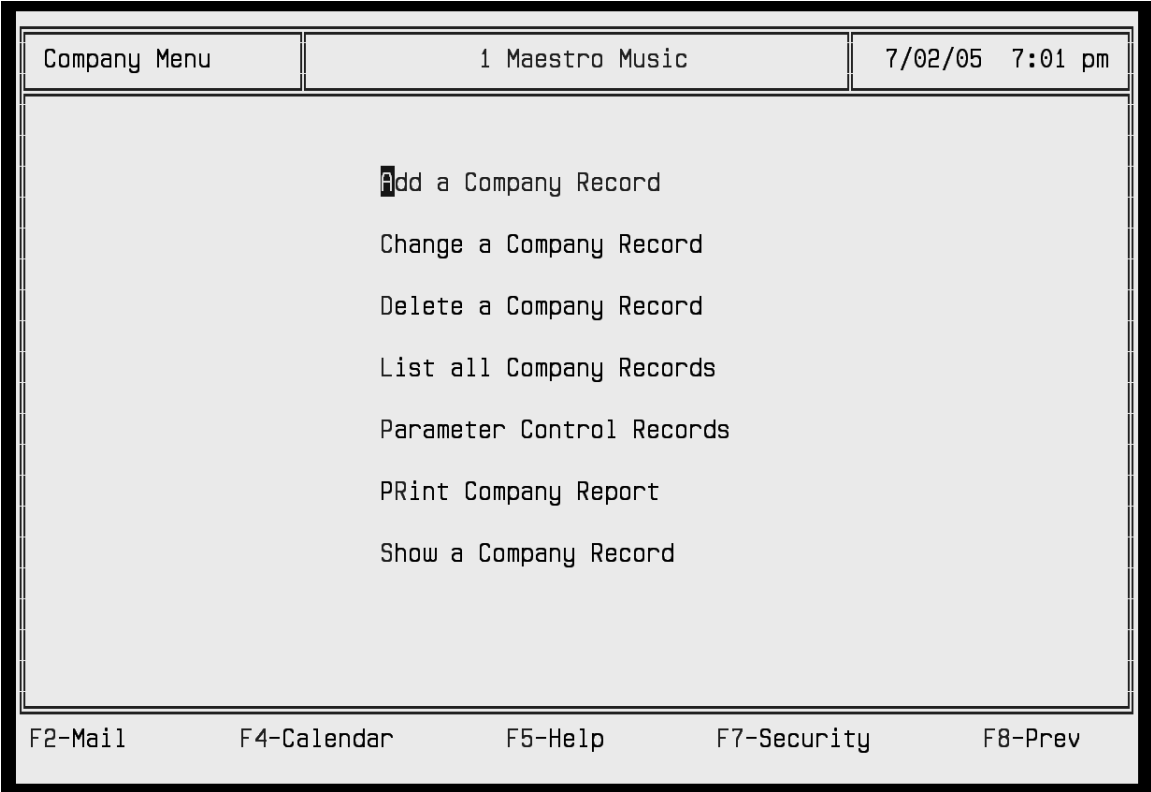


Figure 13- 3 Company Maintenance Menu

File Maintenance options are provided for adding, changing, deleting, listing and reporting company control records. Companies that are defined are usable by all modules that require a company control record. Figure 13-4 is an example of a company record.

Show Company	1 Maestro Music	7/02/05 7:03 pm
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Company: █ 1	PRD	START	END
	1	1/01/04	1/31/04
Site name: Maestro Music	2	2/01/04	2/29/04
Address: 711 N. Carancahua St	3	3/01/04	3/31/04
	4	4/01/04	4/30/04
Corpus Christi TX 78475	5	5/01/04	5/31/04
	6	6/01/04	6/30/04
Phone number: (361)993-1790	7	7/01/04	7/31/04
Fax number: (361)993-1731	8	8/01/04	8/31/04
FIN:	9	9/01/04	9/30/04
	10	10/01/04	10/31/04
Current: 1/01/05 to 12/31/05	11	11/01/04	11/30/04
	12	12/01/04	12/31/04

----- MODULES -----

A/R -R: N	A/P: Y	RTO: N	P/O: Y	G/L: Y	13
SUM: Y	T/A: N	STRIP: N	Z: Y	S/A: Y	
F/M: Y	T/M: N	A/R -S: Y	PAWN: N	UPS: N	
B/R: Y	SERV: Y	MOVIE: N	SALES: Y	RTO: Y	
COMMON: Y	LOAN: N	O/E: N	H/R: N	: N	

Input the number for the company

Figure 13- 4 Show Company Record

To add a company record, use the option "Add a Company Record". During the process of adding a new company, several pieces of information must be supplied.

You must enter the number by which the company is to be referenced. This is a unique number. If the number is already in use, you will receive the message as seen in Figure 13-5.



Figure 13- 5 Add Company Record error message

Once the company number has been selected, you are ready to enter the other pieces of information. See Figure 13-6.

Add Company	1 Maestro Music	7/02/05 7:09 pm
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Company: 2	PRD	START	END		
	1	1/01/05	1/31/05		
Site name: █	2	2/01/05	2/28/05		
Address:	3	3/01/05	3/31/05		
	4	4/01/05	4/30/05		
	5	5/01/05	5/31/05		
	6	6/01/05	6/30/05		
Phone number:	7	7/01/05	7/31/05		
Fax number:	8	8/01/05	8/31/05		
FIN:	9	9/01/05	9/30/05		
	10	10/01/05	10/31/05		
Current:	11	11/01/05	11/30/05		
to	12	12/01/05	12/31/05		
----- MODULES -----					
A/R -R: N	A/P: N	RTO: N	P/O: N	G/L: N	13
SUM: N	T/A: N	STRIP: N	Z: N	S/A: Y	
F/M: Y	T/M: N	A/R -S: N	PAWN: N	UPS: N	
B/R: N	SERV: N	MOVIE: N	SALES: N	RTO: N	
COMMON: N	LOAN: N	O/E: N	H/R: N	: N	

You have to enter a company name

Figure 13- 6 Add Company Record

SITE NAME Enter the company name.

ADDRESS The address information found on the company control record is strictly for descriptive purposes. It should be entered in situations where there will be a large number of companies available for selection. Don't worry about two companies with the same name, since all lookup windows allow the address to be optionally displayed to eliminate confusion. There are two address lines followed by city, state and zip code fields.

PHONE NUMBER Enter the company phone number.

FAX NUMBER Enter the company fax number.

FIN Enter the federal taxpayer identification number.

CURRENT TO Enter the dates. The current date range is entered for validation purposes in modules other than the General Ledger. If the General Ledger module is the only applicable module, the information entered here does not matter. Otherwise, the date range entered here will be utilized by the other modules in determining the current operating range. The current operating date range for General Ledger is determined by the General Ledger Parameter Control Record detailed later in this section.

MODULES The modules section displays the current modules set to be used by the company. This information is supplied elsewhere and you cannot change it in this process.

PERIOD START END The financial calendar for the current year should be entered as a series of beginning and ending date ranges. Make sure you do not overlap the ranges or leave any gaps within the year. This information is used in determining which “bucket” to update whenever summary data is retained. Either the calendar year can be used or a year with up to thirteen defined periods can be used.

After the company record has been created, you can start adding the additional data related to the company. The company number plays a critical role in the operation of the software and is embedded in all master records and transactions. Prior to setting up additional data, you should take time to think about the relationship between companies and their subordinate profit centers, warehouses, customers and vendors. Certain system specific information must be entered per company from the parameters selection off the company menu.

Once the company parameters have been defined, they may be modified by using the “Change a Company Record” option.

Specific system-wide parameters can be found on the company parameter control record and should be set to ensure consistent operation. To view the system parameters, use the option “Parameter Control Records”.

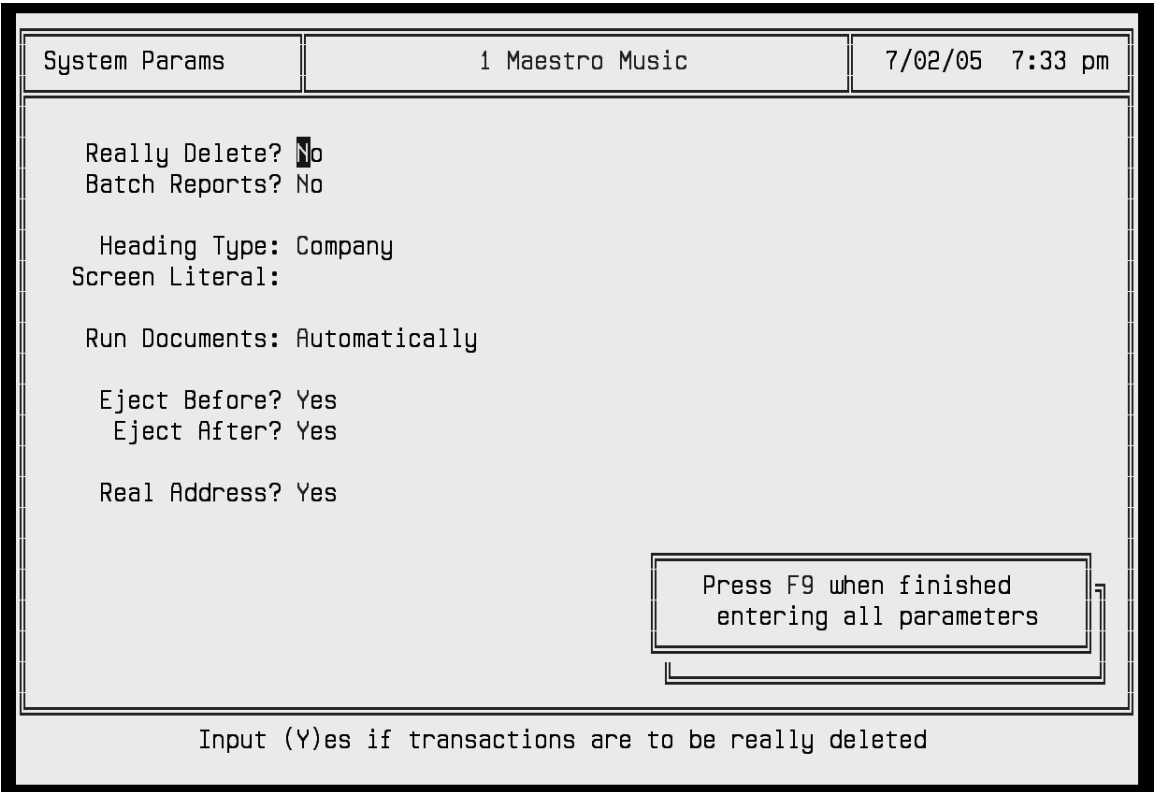


Figure 13- 7 Add Company Record

REALLY DELETE You have the option of really deleting transactions or just marking them as deleted. If they are marked as deleted, you usually have the option of un-deleting them in the future.

BATCH REPORTS The Batch Reports option gives you control whether or not all reports should be executed in the background. Background processing of reports will free up your terminal so you can continue working while the reports are being processed. Most multi-user systems offer this capability.

HEADING TYPE Enter (C)ompany or (L)iteral. A position at the top of the screen has been set aside for either the current operating company name or a literal of your choice, depending upon the answer to the Heading Type.

SCREEN LITERAL If you request that a literal be displayed, you must also enter that literal in the space provided.

RUN DOCUMENTS The documents can be printed (M)anually upon request or (I)mmediately by demand or (A)utomatically by the menu system. If you are not using a module that requires background processing of documents, you should select manual processing. Only elect automatic printing if you would like the menu system to start the document spooler automatically. Immediate printing provides compatibility with single-tasking operating systems like MS-DOS by suspending processing until the document is printed.

EJECT BEFORE/EJECT AFTER You may set the software to eject a page before and/or after reports.

REAL ADDRESS If you want to use the address just as you have typed it in to the computer, answer Y for yes to Real Address. If Real Address is N for no, the software translates the address to all upper case.

A company that is no longer needed may be removed from the database by selecting the "Delete a Company Record" option. See Figure 13-8.

Delete Company	1 Maestro Music	7/02/05 8:52 pm
Company: 2	PRD	START END
	1	1/01/05 1/31/05
Site name: Fancy Music	2	2/01/05 2/28/05
Address: 123 Mozart Lane	3	3/01/05 3/31/05
	4	4/01/05 4/30/05
Corpus Christi TX 78411	5	5/01/05 5/31/05
	6	6/01/05 6/30/05
Phone number: (555)555-5555	7	7/01/05 7/31/05
Fax number: (555)555-5556	8	8/01/05 8/31/05
FIN: 123456789	9	9/01/05 9/30/05
	10	10/01/05 10/31/05
Current: 1/01/41 to 12/31/05	11	11/01/05 11/30/05
----- MODULES -----	12	12/01/05 12/31/05
A/R -R: N A/P: N RTO: N P/O: N G/L: N	13	
SUM: N T/A: N STRIP: N Z: N S/A: Y		
F/M: Y T/M: N A/R -S: N PAWN: N UPS: N		
B/R: N SERV: N MOVIE: N SALES: N RTO: N		
COMMON: N LOAN: N O/E: N H/R: N : N		
Is this the company to be deleted? <input type="checkbox"/>		

Figure 13- 8 Delete A Company Record

Once you have selected the company, you will be prompted to verify your selection before the company is actually deleted. Enter Y for yes to delete.

Note: Company #1 is required by the software and cannot be deleted.

All companies defined in the database may be listed on the screen using the list company function. The company number, name and current operating period are displayed. Should the listing span more than one screen, you can use the F1 and F2 keys to page back and forth through the listing. To return to the Company Menu, press the F8 key.

A printed copy of the defined companies within the database may be obtained by selecting the "Print Company Report" option. See Figure 13-9.

Print Company	1 Maestro Music	5/08/06 11:10 am
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Sort Option: Company Number

Printer ID: LP01
Control? No

Press F9 when finished
entering all parameters

Input the sort option: (C)ompany Number or (N)ame

Figure 13- 9 Print Company Report Screen

SORT OPTION The company report offers two sort options. You may sort the listing by selecting (C)ompany Number or (N)ame.

PRINTER ID The printer id defaults to the printer id on your operator record. This value may be overridden with another printer or file name.

CONTROL You may choose to let the software control the printer. The value also defaults to the setting found on your operator record. This value may be overridden.

Once all the parameters have been entered, press the F9 key to begin the printing process. Figure 13-10 is an example of a company report.

Date: 5/08/06		Company Report								Page: 1		
1	Maestro Music 711 W. Carancahua St Corpus Christi TX 78475				Phone: (361)993-1790 Fax: (361)993-1731		CURRENT PERIOD 1/01/05-12/31/05					
PRD 1	PRD 2	PRD 3	PRD 4	PRD 5	PRD 6	PRD 7	PRD 8	PRD 9	PRD 10	PRD 11	PRD 12	PRD 13
1/01/05	2/01/05	3/01/05	4/01/05	5/01/05	6/01/05	7/01/05	8/01/05	9/01/05	10/01/05	11/01/05	12/01/05	
1/31/05	2/29/05	3/31/05	4/30/05	5/31/05	6/30/05	7/31/05	8/31/05	9/30/05	10/31/05	11/30/05	12/31/05	
2	Maestro Music #2 123 Mozart Lane Corpus Christi TX 78411				Phone: (555)555-5555 Fax: (555)555-5556		CURRENT PERIOD 1/01/05-12/31/05					
PRD 1	PRD 2	PRD 3	PRD 4	PRD 5	PRD 6	PRD 7	PRD 8	PRD 9	PRD 10	PRD 11	PRD 12	PRD 13
1/01/05	2/01/05	3/01/05	4/01/05	5/01/05	6/01/05	7/01/05	8/01/05	9/01/05	10/01/05	11/01/05	12/01/05	
1/31/05	2/28/05	3/31/05	4/30/05	5/31/05	6/30/05	7/31/05	8/31/05	9/30/05	10/31/05	11/30/05	12/31/05	

Figure 13-10 Company Report Example

You may view the information relating to a particular company within the database by selecting the "Show a Company Record" option. All information for the selected company will be displayed as seen in Figure 13-11. When using the show option, you do not have any editing capabilities.

Show Company	1 Maestro Music	6/16/06 11:47 am
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Company: █ 1	PRD	START	END
	1	1/01/05	1/31/05
Site name: Maestro Music	2	2/01/05	2/28/05
Address: 711 N. Carancahua St	3	3/01/05	3/31/05
	4	4/01/05	4/30/05
Corpus Christi TX 78475	5	5/01/05	5/31/05
	6	6/01/05	6/30/05
Phone number: (361)993-1790	7	7/01/05	7/31/05
Fax number: (361)993-1731	8	8/01/05	8/31/05
FIN:	9	9/01/05	9/30/05
	10	10/01/05	10/31/05
Current: 1/01/05 to 12/31/05	11	11/01/05	11/30/05
----- MODULES -----	12	12/01/05	12/31/05
A/R -R: N A/P: Y RTO: N P/O: Y G/L: Y	13		
SUM: Y T/A: N STRIP: N Z: Y S/A: Y			
F/M: Y T/M: N A/R -S: Y PAWN: N UPS: N			
B/R: Y SERV: Y MOVIE: N SALES: Y RTO: Y			
COMMON: Y LOAN: N O/E: N H/R: N : N			

Input the number for the company

Figure 13-11 Show Company Information Screen

Complaint Code Maintenance

Customer complaint codes are used to identify warrantied NARDA and NESDA service work.

File maintenance options are provided for adding, changing, deleting, listing, printing and showing customer complaint codes. See Figure 13-12.

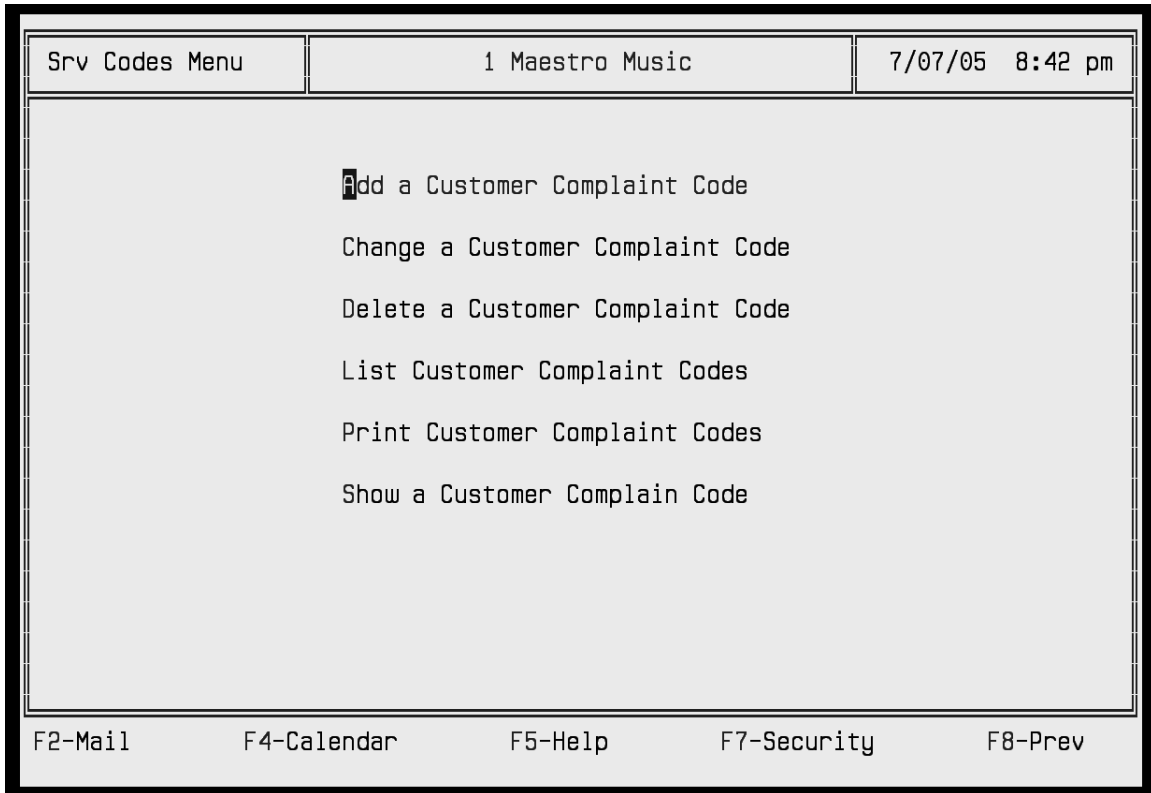


Figure 13-12 Complaint Code Maintenance Menu

A database of customer complaint codes may be established by predefining each code to be used. Other customer complaint codes may be added as needed. Use the "Add a Customer Complaint Code" option. See Figure 13-13.

Add Srv Code	1 Maestro Music	7/07/05 8:51 pm
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Customer complaint code: IAUD

Code type: EIA

Description: Sound is heard only sometimes

Input the description that identifies this customer complaint code

Figure 13-13 Add Customer Complaint Code Screen

CUSTOMER COMPLAINT CODE Enter the customer complaint code.

CODE TYPE Enter the customer complaint code.

DESCRIPTION Enter a description to further explain the customer complaint code.

Any customer complaint codes may be modified using the "Change a Customer Complaint Code" option. See Figure 13-14.

Change Srv Code	1 Maestro Music	7/07/05 8:57 pm
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Customer complaint code:

Code type:

Description:

ALME	ALIGNMENT	ALIGNMENT, MECHANICAL
APPR	APPEARANCE	COSMETIC DEFECT
CLEA	CLEANING	CLEAN/REMOVE OF FOREIGN MATTER
CUST	CUST EDUC	CUSTOMER EDUCATED ON UNIT
FACT	FACT MODIF	FACTORY UPDATE OR SERVICE
RERE	INS	REOCCURING REPAIR

F1-Forward F2-Back F4-Change Code F6-Add Code F10-Exit ENTER-Select

Figure 13-14 Change Customer Complaint Code Screen

When a customer complaint code is no longer needed, it may be removed from the database using the "Delete a Customer Complaint Code" option. If the code is not known, you may select it from a lookup window. The window will display the code, code type and description. You may scroll through the list using the F1 and F2 keys to page forward and back until you locate the customer complaint code you want to delete. To select the code, place your cursor on the code and press the ENTER key. See Figure 13-15.

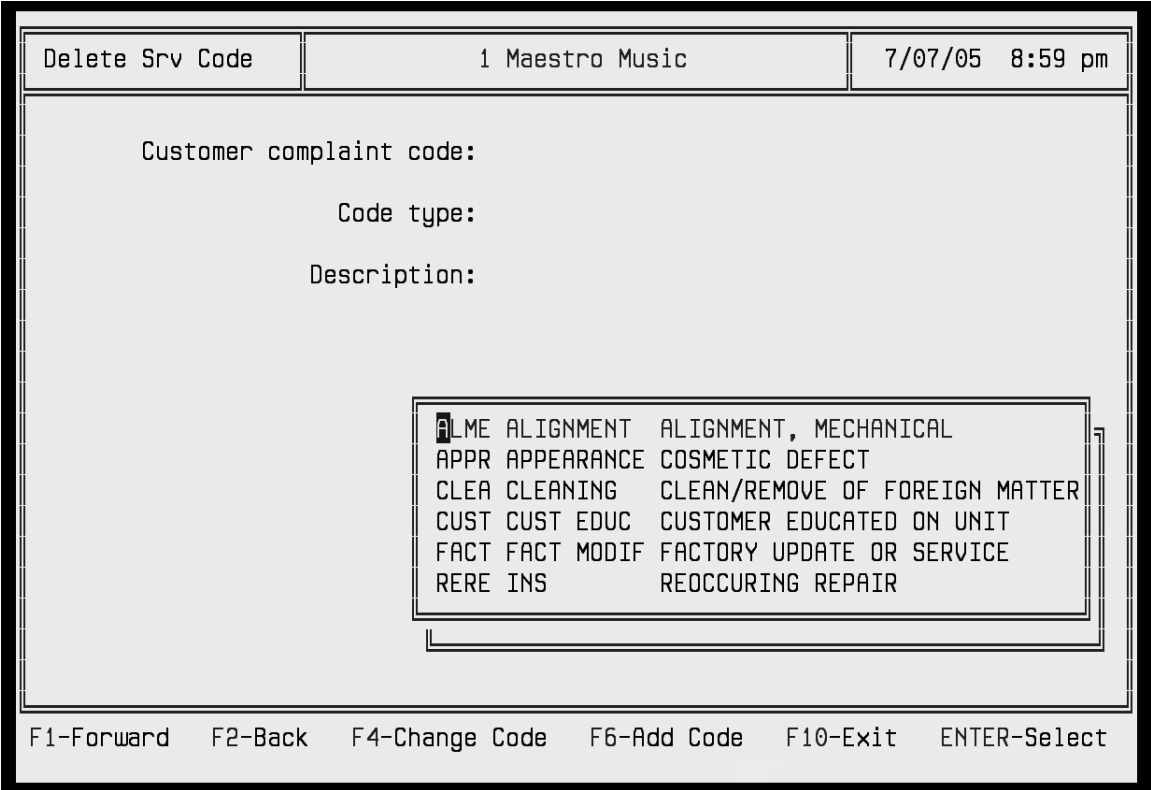


Figure 13-15 Delete Customer Complaint Code Screen

Once you have selected the code, all information for this code will be retrieved and displayed on the screen. Before the customer complaint code is deleted, you will be prompted to verify your selection. Answering Y for yes will delete the code. If you answer N for no, you may select another code for deletion. To return to the menu, press the F8 key. See Figure 13-16.

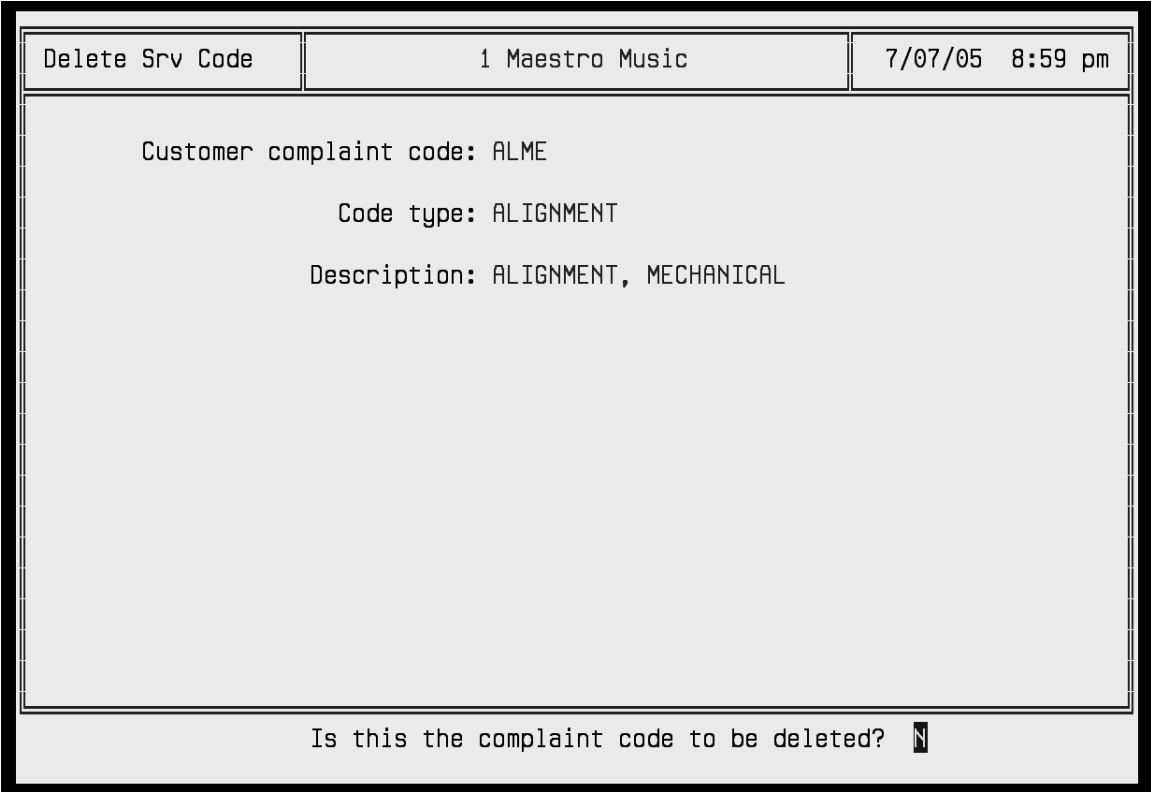


Figure 13-16 Delete Customer Complaint Code Screen

You may view on the screen, all the customer complaint codes that have been defined within the database using the "List Customer Complaint Codes" option. See Figure 13-17.

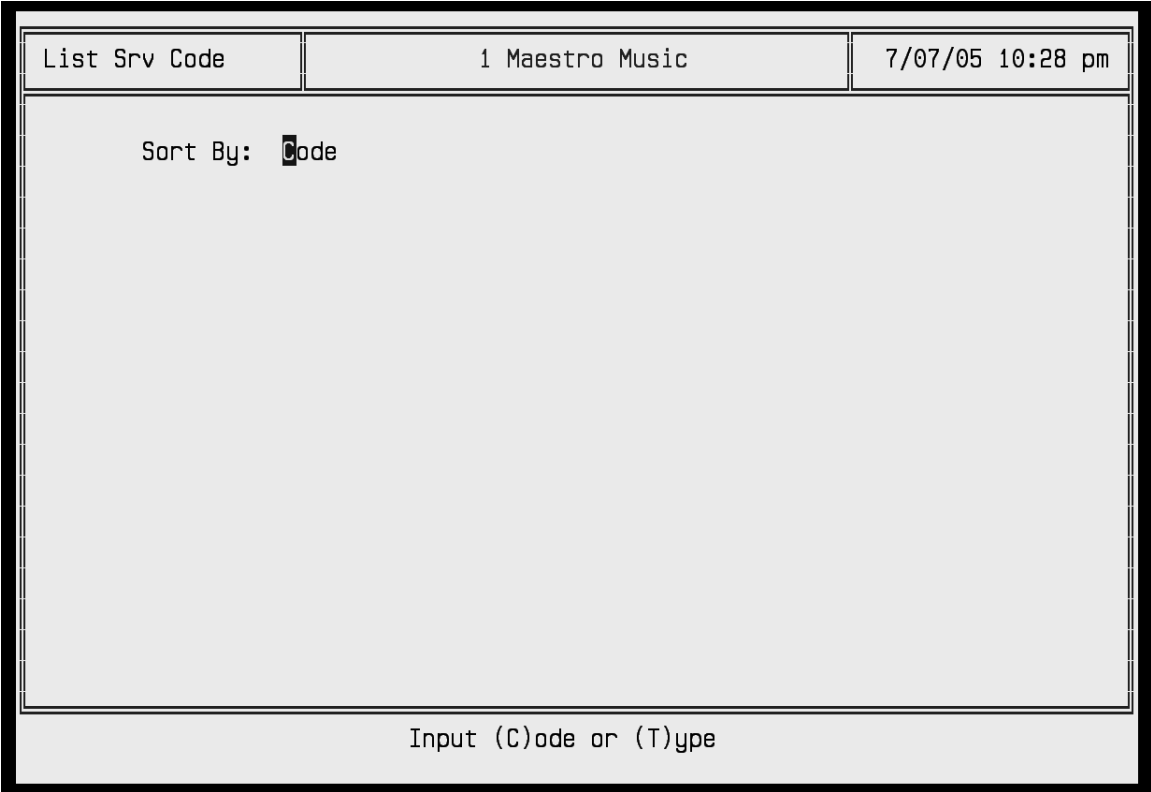


Figure 13-17 List Customer Complaint Code Screen

SORT BY Select to have the list sorted by either complaint (C)ode or complaint (T)ype.

After selecting the sort sequence, all codes will be displayed on the screen. See Figure 13-18. If the list spans more than one screen, you may page through it using the F1 and F2 keys. To return to the Customer Complaint Code Menu, press the F8 key.

Print Srv Codes	1 Maestro Music	7/07/05 10:51 pm
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Printer ID: P01
Control? No

Press F9 when finished
entering all parameters

Input the printer ID on which to print the report

Figure 13-19 Print Customer Complaint Code Listing Screen

PRINTER ID The printer id defaults to the printer id on your operator record. This value may be overridden with another printer or file name.

CONTROL You may choose to let the software control the printer. The value also defaults to the setting found on your operator record. This value may be overridden.

Once all the parameters have been entered, press the F9 key to begin the printing process.

You may view a specific code using the "Show Customer Complaint Code" option. The customer complaint code may be entered exactly or selected from a lookup window. Once the code is entered, all information pertaining to the code will be displayed. While viewing the code, you do not have any editing capabilities available. See Figure 13-20.

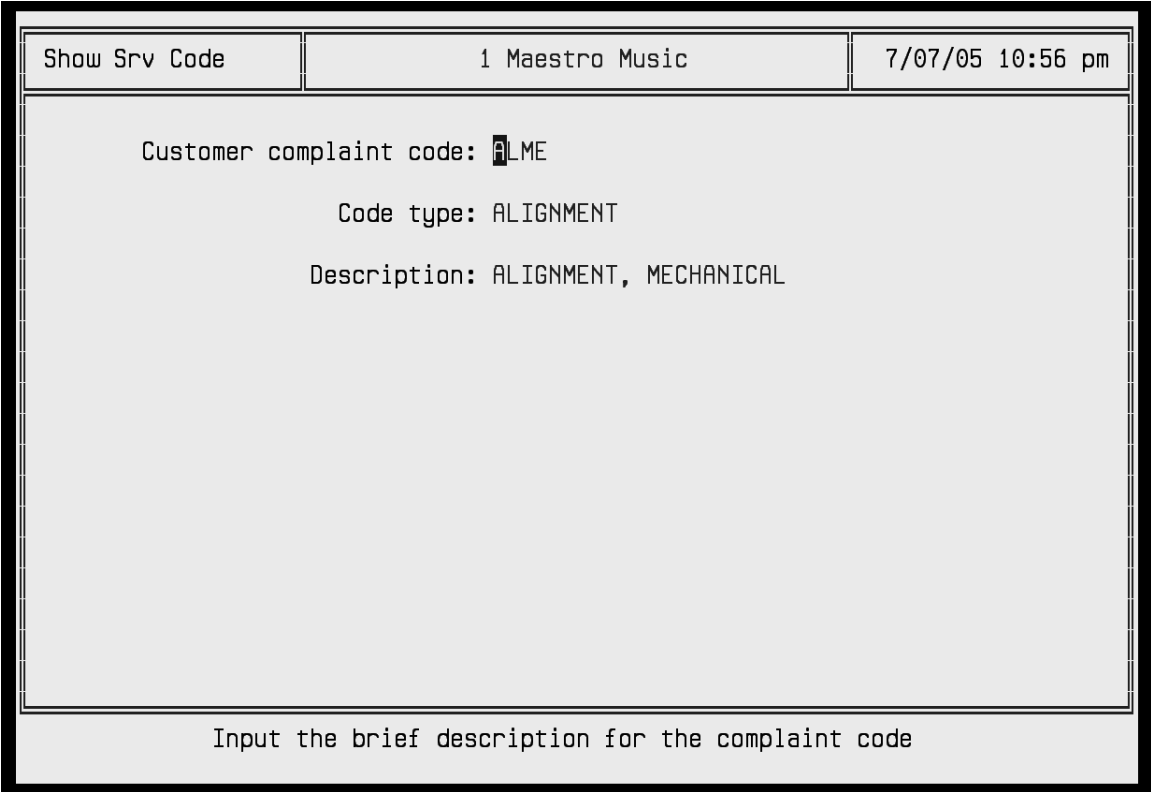


Figure 13-20 Show Customer Complaint Code Screen

To return to the customer complaint code menu, press the F8 key.

Customer Maintenance

Customers are an essential part of the Service Department process. There are options provided for adding, changing, deleting, listing, printing and showing customer information. See Figure 13-21. Note: You will need security authorization access to be able to add, change or delete a customer record.

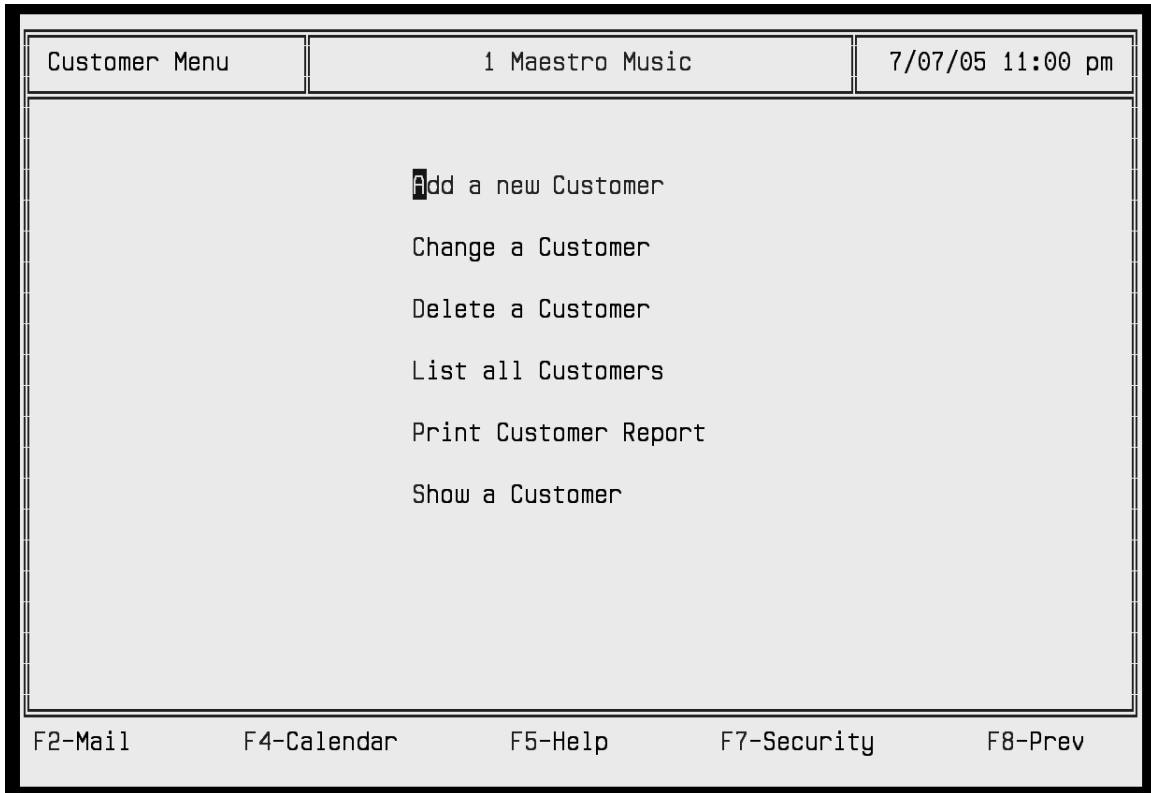


Figure 13-21 Customer Maintenance Menu

Each customer is assigned a customer number of up to eight digits in length. Most applications allow you to select the customer through a series of lookup windows, making it unnecessary to remember customer numbers. See Figure 13-22 for an example of the “Show a Customer” option.

Show Customer	1 Maestro Music	7/07/05 11:03 pm
Customer Nbr: <input type="text" value="501433"/>		Company: No
Name: ABBOTT DEIRDRE		
Address: 131 WALMAR DR		Bill to:
		Map Code:
ANYTOWN TX 55555-0000		Bal Method: Open Item
SSN: 000-00-0001 DL# 1		
Phone number: (555)555-5555		Copies: 0
Fax number: (555)555-5555		Credit Limit: 0
Taxable: Yes		
Tax codes:		Disc Grace: 0
		Serv Charge: 0.0
		Serv Grace: 0
Terms:		
Input the customer number or a few characters of the name		

Figure 13-22 Show a Customer Screen

CUSTOMER NBR Can be to an eight digit customer number. The customer number will be generated for you if you leave the field blank.

COMPANY A Y for yes will cause the name field to be handled as a company name instead of as a person's name.

NAME The Company name or a person's name, depending on the setting of the company flag.

ADDRESS Address information for the company or person.

SSN The customer's social security number. The number will be validated to make sure that this customer is not already on file.

DL# The customer's driver's license number. The number will be validated to make sure that this customer is not already on file.

PHONE NUMBER The customer's phone number.

FAX NUMBER The customer's fax number.

TAXABLE A Y for yes indicates that taxes should be charged to this customer. If the customer is non-taxable an N will display here. If the customer is non-taxable, you will be required to enter either a sales tax number or a reason for not charging sales tax on taxable merchandise.

TAX CODES Up to five different tax codes can be specified per customer. The tax code or part of the jurisdiction name may be displayed here. You can enter the tax code or part of the jurisdiction name and select the tax code from those already defined in the system.

TERMS The payment terms can be selected from a list of predefined terms by leaving the field blank. This field lists the payment terms.

BILL TO Rental tickets include both a “ship to” and a “bill to” customer. The customer number that the invoices should be charged to for this customer will display here. This field should be left blank if this customer is both the “ship to” and the “bill to” account.

MAP CODE Map code for Canada customers or companies.

BAL METHOD Balance Forward – Payments are automatically applied to the outstanding invoices.

Open Item – Payments must be manually applied to each outstanding invoice.

COPIES Number of copies of the contract to be printed.

CREDIT LIMIT The credit limit for this account. If a contract's total amount would cause the customer's outstanding balance to exceed their credit limit, the contract would be put on credit hold until either the credit limit is increased, the outstanding balance decreases or the credit hold is overridden.

DISC GRACE Number of days that should be added to the discount date as a grace period.

SERV CHARGE Service charge amount for this customer.

SERV GRACE Number of days that should be added to the due date as a grace period.

COMMENTS Text area for miscellaneous comments. Up to fifty lines of text can be entered.

Any portion of the customer information may be updated at a later date using the “Change a Customer” option. Customer selection for changing may be made from a lookup window.

A customer record may be removed from the database using the “Delete a Customer” option. If you try to delete a customer that has orders or invoices associated with that customer number, you will receive a message “Orders/Invoices are on file for this customer!” and you will not be allowed to delete this customer record. Customer selection for deletion may be made from a lookup window. You may scroll through the list using the F1 and/or F2 keys. If a customer has the same name, press the F5 key to “fold/unfold” the customer information. This also allows you to verify your selection. To make a selection, place your cursor on the correct name and press the ENTER key. All customer information will be retrieved and displayed for you. See Figure 13-23.

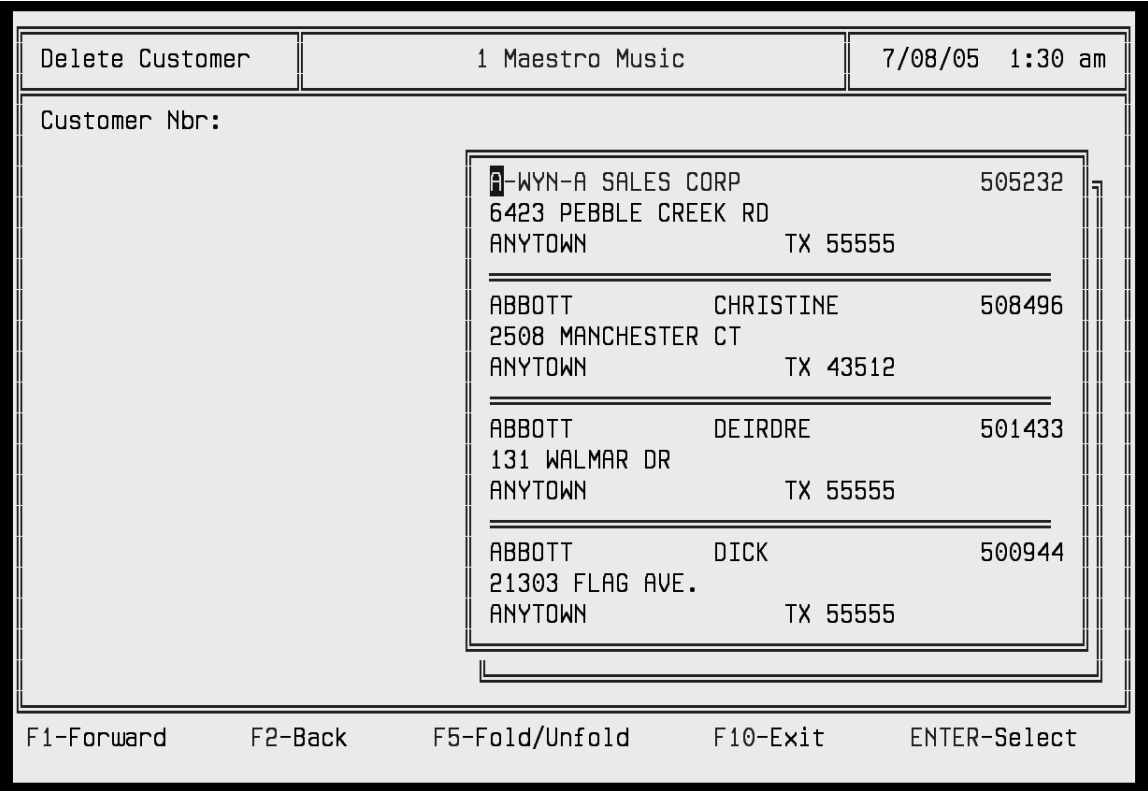


Figure 13-23 Delete a Customer Screen with the customer list unfolded

Once a customer is selected, you will be prompted to verify your selection with the message "Is this the customer to be deleted?" as seen in Figure 13-24. To delete the customer, enter Y for yes. You may return to the customer menu by pressing the F8 key.

Delete Customer	1 Maestro Music	7/08/05 1:30 am
Customer Nbr: 501433	Company: No	
Name: ABBOTT DEIRDRE	Bill to:	
Address: 131 WALMAR DR	Map Code:	
ANYTOWN TX 55555-0000	Bal Method: Open Item	
SSN: 000-00-0001 DL# 1	Copies: 0	
Phone number: (555)555-5555	Credit Limit: 0	
Fax number: (555)555-5555		
Taxable: Yes		
Tax codes:	Disc Grace: 0	
	Serv Charge: 0.0	
	Serv Grace: 0	
Terms:		
Is this the customer to be deleted? <input type="checkbox"/>		

Figure 13-24 Delete a Customer Screen

You may view on screen a list of customers within the database using the “List All Customers” option. See Figure 13-25. You have the option to sort by customer name or customer number. You also have the option to begin the list with a certain customer number or customer name.

List Customers		1 Maestro Music		7/08/05 2:16 am	
Sort: Name =>					
NUMBER	NAME	ADDRESS	CITY	ST	
505232	A-WYN-A SALES CORP	6423 PEBBLE CREEK RD	ANYTOWN	TX	
508496	ABBOTT CHRISTINE	2508 MANCHESTER CT	ANYTOWN	TX	
501433	ABBOTT DEIRDRE	131 WALMAR DR	ANYTOWN	TX	
500944	ABBOTT DICK	21303 FLAG AVE.	ANYTOWN	TX	
504314	ABBOTT NORMA	1808 APRIL LN	ANYTOWN	TX	
501597	ABBOTT RICK	1808 APRIL LN	ANYTOWN	TX	
100005	ABC MUSIC INC.	1234 W. ANYROAD DRIV	ANYTOWN	TX	
100001	ABC MUSIC INC.	12345 ANY OAK DRIVE	ANYTOWN	TX	
505354	ABE DEBBY	N6W31414 ALBERTA DR	ANYTOWN	TX	
510997	ABEYSEKERA SRINIC	949 HARVENT LANE	ANYTOWN	TX	
501731	ABILD PATRICIA	4609 N 101ST STREET	ANYTOWN	TX	
400012	ABINGTON SCHOOL DISTRICT	970 HIGHLAND AVE.	ANYTOWN	TX	
503552	ABLER PAUL	36752 LOWER LAKE RD	ANYTOWN	TX	
506206	ABNEY JAMETRICE	8615 W DOUGLAS AVE	ANYTOWN	TX	
508184	ABOLT DEBBIE	711 N. CARANCAHUA	ANYTOWN	TX	
507879	ABOLT JAMES	15965 RAVEN ROCK RD.	ANYTOWN	TX	
509914	ABPLANALP ANGELA	11031 W RUBY AVE	ANYTOWN	TX	
F1-Next Page		F2-Prev Page		F10-Exit	

Figure 13-25 List Customers Screen

The list provides you with the customer number, customer name and address. You scroll through the list using the F1 and F2 keys. You may return to the Customer Menu by pressing the F8 key.

A printed report detailing the customer information may be obtained using the "Print Customer Report" option. See Figure 13-26.

Print Customers	1 Maestro Music	7/08/05 2:26 am
-----------------	-----------------	-----------------

Beginning Number: 0
 Ending Number: 0

 Beginning Name:
 Ending Name:

 Sort Option: Name

 Include Notes? Yes

 Report Type: All

 Report Format: Full

 Printer ID: LP01
 Compress? No

Press F9 when finished
 entering all parameters

Input the beginning customer number to be included

Figure 13-26 Print Customer Report Screen

The scope of the report may be limited to only the required information by supplying report parameters.

BEGINNING/ENDING NUMBER The customer numbers entered limit the report to tickets with customer numbers falling between the numbers entered.

BEGINNING/ENDING NAME The customer names entered limit the report to tickets with customer names falling between the names entered.

SORT OPTION Enter (C)ustomer Number, (N)ame or (S)tate to have the report sorted and displayed in the sort order you chose.

INCLUDE NOTES Enter Y for yes to include any notes for the selected customer or range of customers.

REPORT TYPE Enter (B)ill to (S)hip to or (A)ll to limit the customer selection to only bill to or ship to customers. By selecting all, you will receive all customers in the database that fall within the specified range.

REPORT FORMAT Enter (F)ull or (S)hort for report format.

PRINTER ID The printer id defaults to the printer id on your operator record. This value may be overridden with another printer or file name.

COMPRESS Enter Y for yes if you want the program to control the setting of the printer.

Leaving any parameter field blank will result in the use of the default value or a selection criteria default of all for that specific parameter.

Once all parameters are entered, press the F9 key to begin the printing process. You may return to the customer menu by pressing the F8 key.

Equivalent Model Maintenance

Substitutions of equivalent models are sometimes necessary when an item is out of stock. You can set up the equivalent numbers through this process or through the model maintenance process. When defining equivalent numbers, enter the original model number first. See Figure 13-27.

Equivalent Models	1 Maestro Music	7/08/05 3:14 am
Model: GAEPIMM50VS MANDOLIN		
Equivalentent: █		
Input equivalent model number for this model		

Figure 13-27 Equivalent Model Maintenance Screen

Next enter the equivalent model number. Several equivalent model numbers may be defined. See Figure 13-28.

When entering both model numbers, you may make a selection from a lookup window which can display your selections by either model number or description. You can also use the Item Maintenance program to set up equivalent model numbers.

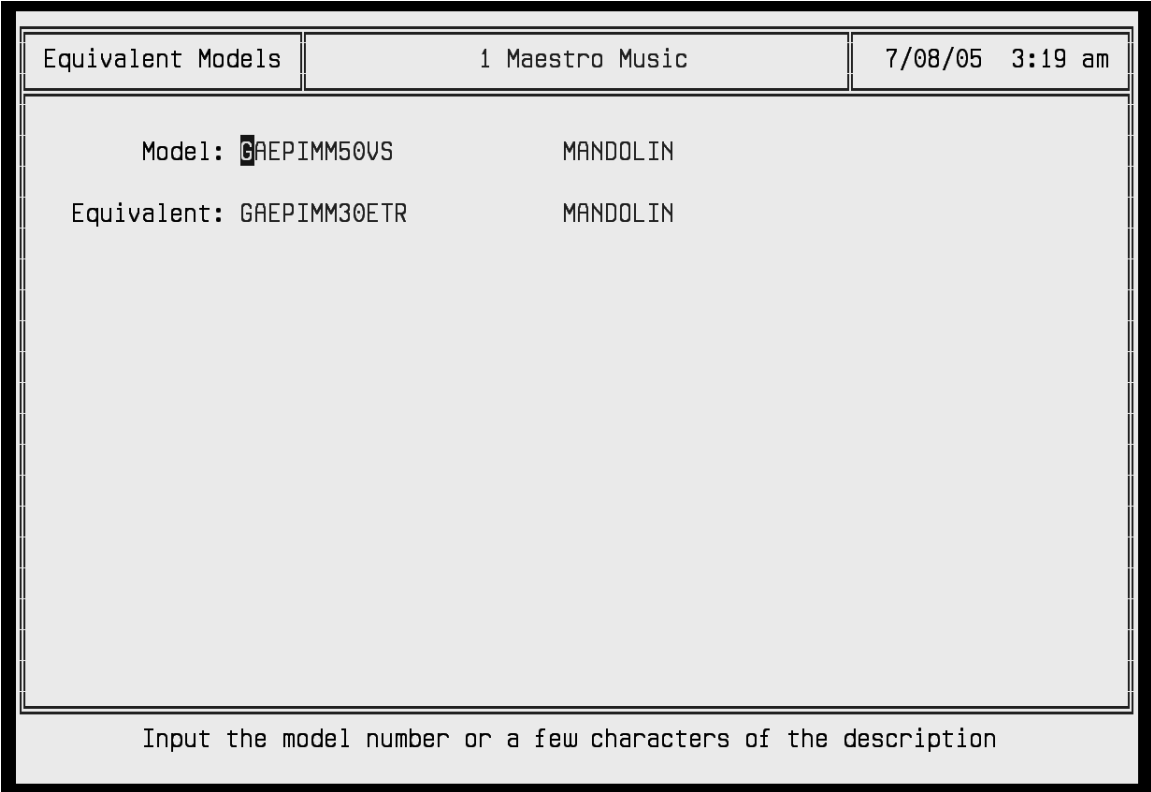


Figure 13-28 Equivalent Model Maintenance Screen

Hourly Rate Maintenance

Hourly rates are established so that you may create a predefined list of your hourly rates. Predefining the rates eliminates the need to remember all of your different rates. An unlimited number of rates may be defined.

Maintenance functions are also provided to change, delete, list, print and show Hourly Rate codes. See Figure 13-29.

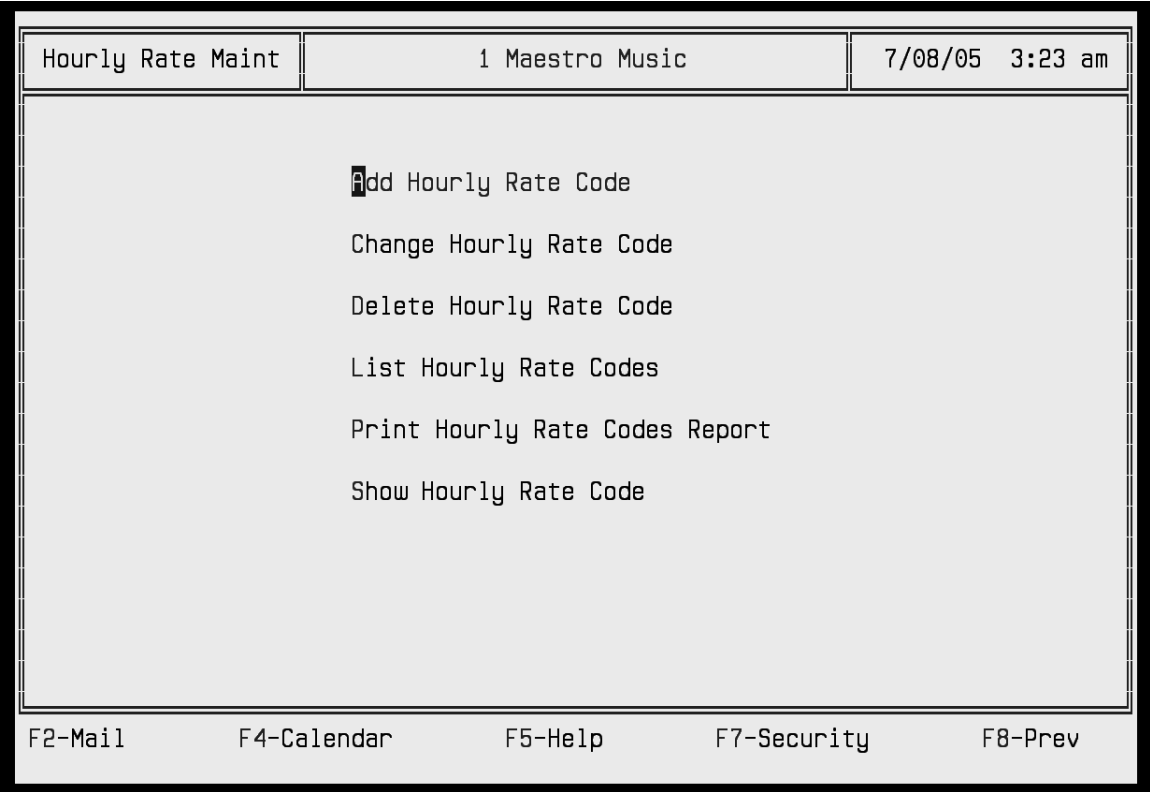


Figure 13-29 Hourly Rate Maintenance Screen

New codes may be easily added by using the "Add Hourly Rate Code" option. See Figure 13-30.

Add Hourly Rate	1 Maestro Music	7/08/05 3:29 am
<p>Hour code: TECH</p> <p>Description: Technical Hourly Rate</p> <p>Rate: 20.00</p>		
<p>Input the hourly rate for this hour code</p>		

Figure 13-30 Add Hourly Rate Screen

HOUR CODE Enter the hourly rate code.

DESCRIPTION Enter a brief description of the code.

RATE Enter the hourly rate for the code.

After defining the hourly rate codes, they become available to you within the lookup windows.

Any modifications to hourly rate codes may be made using the "Change Hourly Rate Code" option.

Also, hourly rate codes may be removed from the database when they are no longer needed. The hourly rate codes may be entered or selected from a lookup window. See Figure 13-31. You may scroll the listing using the F1 and F2 keys.

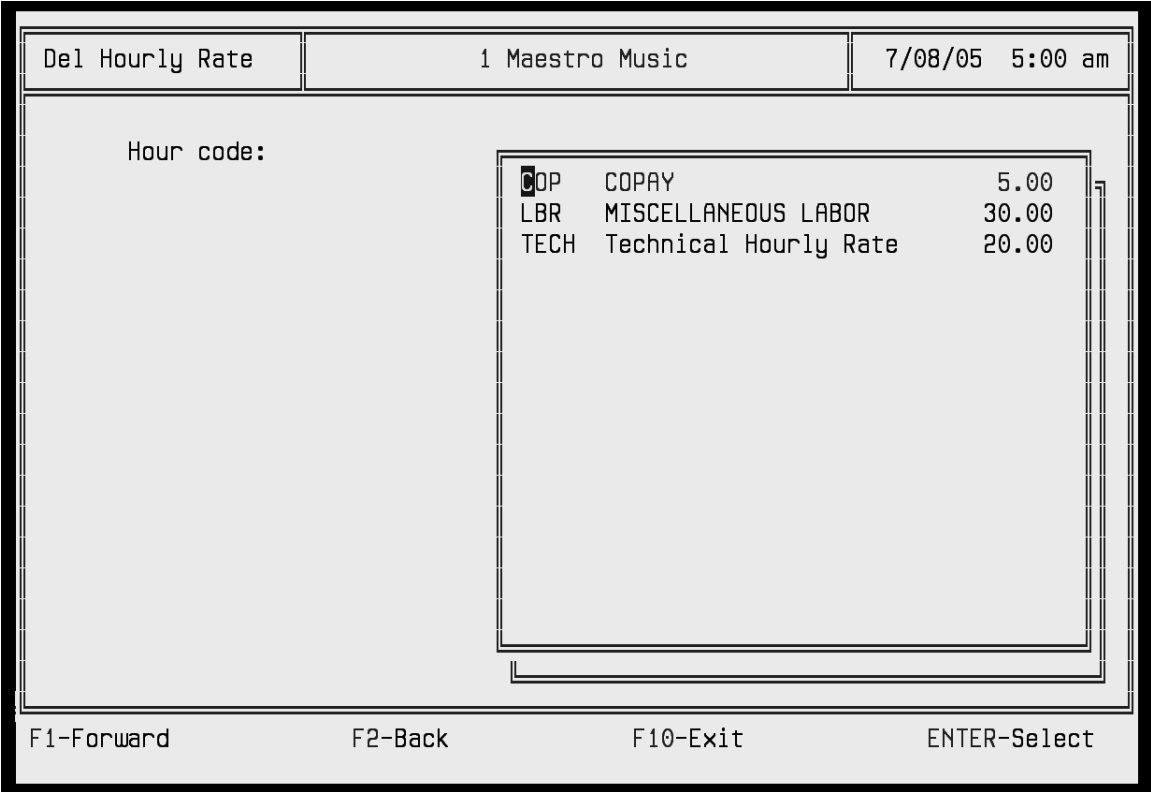


Figure 13-31 Delete Hourly Rate Screen with lookup window

Once you have located the appropriate code, you may select it by placing the cursor on the code and pressing the ENTER key. See Figure 13-32.

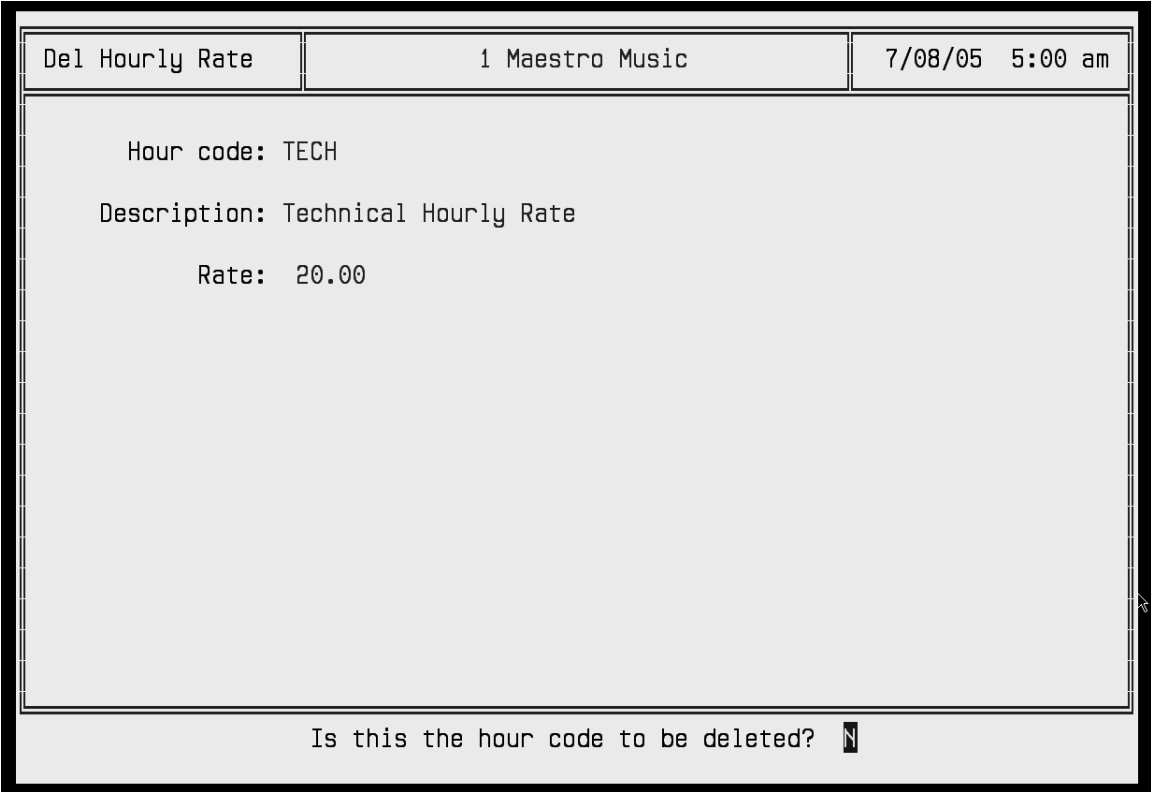


Figure 13-32 Delete Hourly Rate Screen with prompt

You will be prompted with the question “Is this the hour code to be deleted?” Enter Y for yes to delete. You may return to the Hourly Rate Maintenance Menu by pressing the F8 key.

You may view the hourly rate codes within the database on the screen. See Figure 13-33.

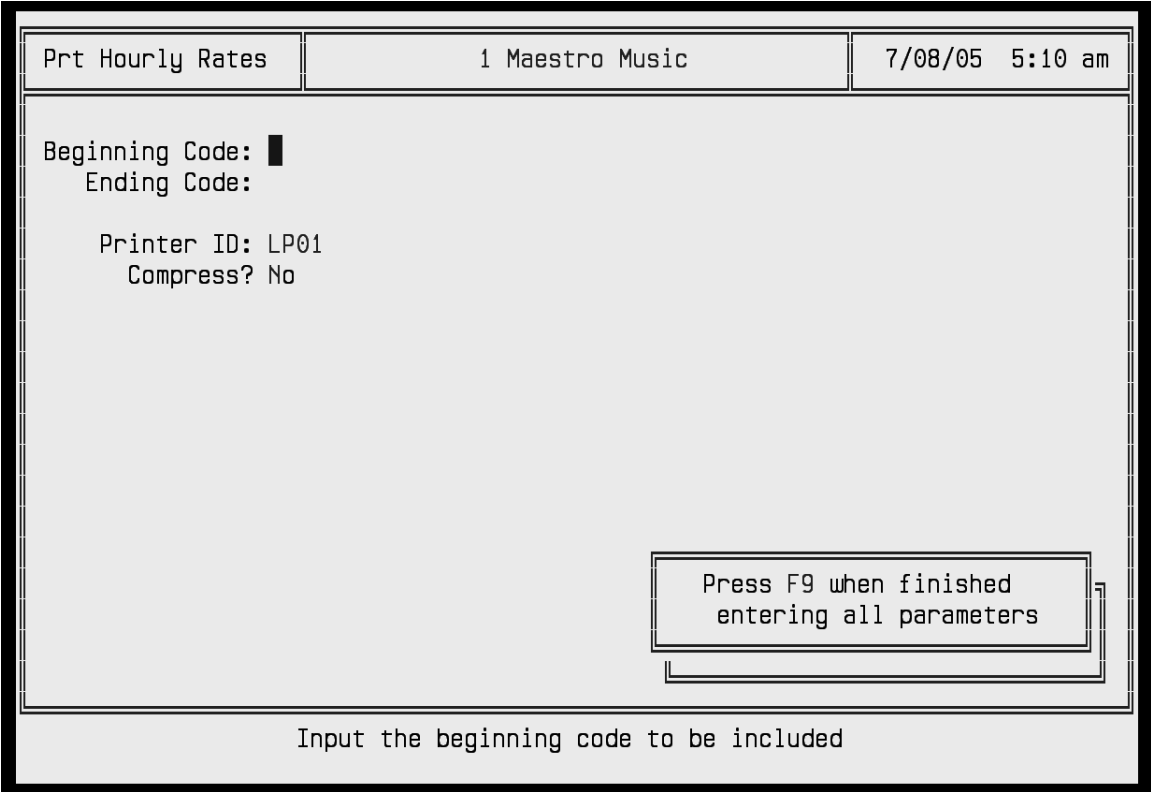


Figure 13-34 Print Hourly Rate Screen

BEGINNING/ENDING CODE The hourly rate codes entered limit the report to hourly rate codes falling between the codes entered.

PRINTER ID The printer id defaults to the printer id on your operator record. This value may be overridden with another printer or file name.

COMPRESS Enter Y for yes if you want the program to control the setting of the printer. This value also defaults to the setting found on your operator record but may be overridden.

Once all the parameters are entered, press the F9 key to begin the printing process.

A particular hourly rate code may be viewed using the "Show Hourly Rate Code" option. See Figure 13-35.

Show Hourly Rate	1 Maestro Music	7/08/05 5:23 am
Hour code: TECH		
Description: Technical Hourly Rate		
Rate: 20.00		
Input the hour code		

Figure 13-35 Show Hourly Rate Screen

The hour code may be selected from a lookup window. Once the code has been displayed, you do not have any editing capabilities. You may only view the code. To return to the Hourly Rate Code Maintenance Menu, press the F8 key.

List Equivalent Models

You may view the equivalent model for an item by using the list function. See Figure 13-36.

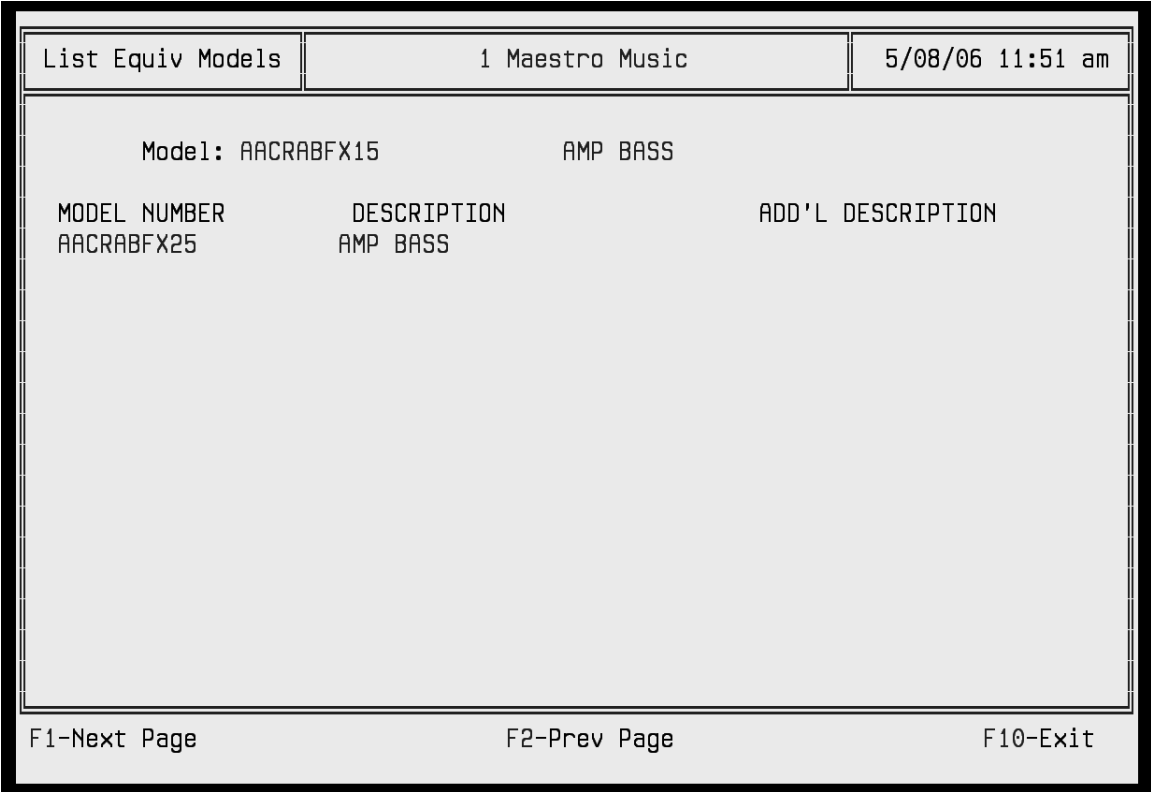


Figure 13-36 List Equivalent Models Screen

Once you have selected the model number, all equivalent model numbers will be listed. If the list extends past one screen page, you may scroll back and forth through the listing using the F1 and F2 keys. The F8 key will return you to the menu.

Inventory Functions

You may perform various inventory maintenance activities by selecting “Inventory Functions” off the File Maintenance Screen. See Figure 13-37.

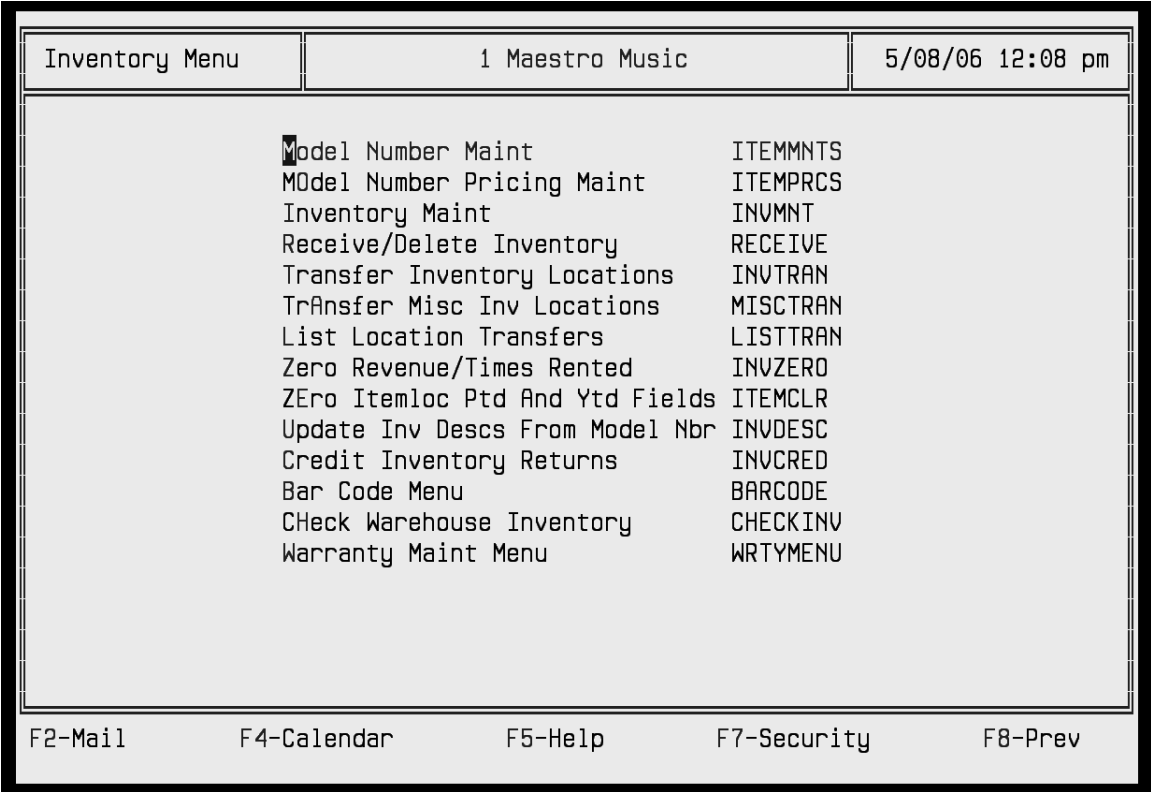


Figure 13-37 Inventory Menu Screen

To view inventory function information see the [Maestro SBE Countertop Guide](#), [Maestro Countertop Guide](#) or the [RSSS Countertop Guide](#)

Parameter Maintenance

Certain default values must be set using the Service Department Parameter Maintenance process. See Figure 13-38.

Service Dept	1 Maestro Music	5/08/06 12:37 pm
--------------	-----------------	------------------

Normal Labor: 45.00 Tax? Y Normal Trip Charge: 30.00 Tax? Y
 Normal Freight: 45.00 Tax? Y Normal Cleaning: 30.00 Tax? Y
 Force Purch Date? N Purch At? N Estimate? N
 AR Forms: 40 29 Type: V Pmt Terms: COD
 Don't Post To A/R: 10 11 12 13 14
 Non Balancing Pmt Forms:
 Form Type? T Ticket N3CS-X
 Miscellaneous #1: MISC CHG 1 MISC CHG 1 Y
 Miscellaneous #2: MISC CHG 2 MISC CHG 2 Y
 Use Calendar? N Check Inventory? Y
 Msg: Any request for free adjustments must be made within 48 hours
 Msg: of original repair. Instruments repaired and not called for
 Msg: in 6 months will be sold to pay charges.
 Print Labor/Rate? Y
 State Regulation NBR:
 Strip Model Prefix? N
 Print Name/Address? N
 Always Reprint Nesda? N Skip? N
 Always Print Ticket? N Check? N

Press F9 when finished
 entering all parameters

Input the normal labor charge (1 hour)

Figure 13-38 List Equivalent Models Screen

NORMAL LABOR The default per hour charge for labor. This value will be automatically used as the labor charge unless specified differently at time of entry.

TAX? Enter Y for yes to make the labor charges taxable; otherwise leave as N for no.

NORMAL TRIP CHARGE The amount charged is a trip is made to the customer's home. If a default value is specified, this amount automatically appears on the ticket even if a trip was not made.

TAX? Enter Y for yes to make the normal trip charge taxable; otherwise leave as N for no.

NORMAL FREIGHT The amount charged for freight. This includes shipping a unit back to a customer or the freight charge for needed parts.

TAX? Enter Y for yes to make the normal freight charge taxable; otherwise leave as N for no.

NORMAL CLEANING The amount charged for cleaning a service unit.

TAX? Enter Y for yes to make the normal cleaning charge taxable; otherwise leave as N for no.

All default settings may be overridden when posting an actual service ticket. Again, please note that all of the above items can be flagged as taxable or not. By answering Y for yes to the **Tax?** field question, the program will automatically calculate the taxable amount that is applicable to the customer. By answering N for no, there will be no tax calculation for that item.

FORCE PURCH DATE? This flag indicates whether or not the purchase date for the item must be entered. Setting this flag to Y for yes, will require the purchase date to be entered. Answering with an N for no, make the purchase date entry optional.

FORCE PURCH AT? This flag indicates whether or not the purchase location must be entered. The purchase location is where the customer originally purchased the unit. Setting this flag to Y for yes, will require the purchase location to be entered for the item. This field should be set to Y if you do a lot of outside service for other companies. Answering with an N for no, make the purchase location entry optional.

ESTIMATE? The Force Estimate flag indicates whether or not an estimate is required on all service tickets. Setting this flag to Y for yes, will require the estimate to be entered. Answering with an N for no, make the estimate entry optional.

AR FORMS Enter up to three payment form number(s) for revolving A/R payments. These payment form number(s) will be used on all payment screens to build the default payment profile.

TYPE Enter the customer type for A/R service tickets.

PMT TERMS Enter the default payment terms for service tickets

DON'T POST TO A/R Input our customer number(s) to prevent postings to A/R for it. You may enter up to five of your customer numbers.

NON BALANCE PMT FORMS Enter up to three payment form(s) for posting a non-total billed ticket.

FORM TYPE Input the default form type when printing (N)esda, n(A)rda, (T)icket, or (O)ptional. The valid forms for NESDA are N3CS-X, N7SN or N5CS. The valid form types for NARDA are 101C, 515 OR 360-6.

The service module software includes two user-definable revenue sources. You can define the screen and report headings and flag as taxable or not.

MISCELLANEOUS #1 Input the screen heading for miscellaneous field #1.
Input the report heading for miscellaneous field #1.
Input (Y)es if the miscellaneous field #1 is taxable.

MISCELLANEOUS #2 Input the screen heading for miscellaneous field #2.
Input the report heading for miscellaneous field #2.
Input (Y)es if the miscellaneous field #2 is taxable.

USE CALENDAR? Input (Y)es if the calendar should be used.

CHECK INVENTORY? Input (Y)es if the inventory file should be checked. This checks the RSSS inventory file to verify whether or not the unit was purchased from your company. For items purchased from you, after entering the serial number, the purchased date and item description will automatically be entered for you by what is defined in the system for that item.

MSG: Input a brief message to appear on the service tickets. You have up to three message lines to enter your text message on. This text may be informational or used for promotions and is printed on all service tickets.

PRINT LABOR/RATE Input (Y)es if the labor/rate should be included on ticket. This determines if the labor rate per hour is to print on the service ticket invoice.

STATE REGULATION NBR Input the State Regulation Number issued to your company. This will show on all invoices.

STRIP MODEL PREFIX? Input (Y)es if the prefix should be stripped off model on NARDA forms. Sometimes the prefix added to model numbers is meaningless to NARDA and needs to be stripped from the beginning of all model numbers as they are printed on the NARDA forms.

PRINT NAME/ADDRESS? Input (Y)es to print your company name/address block on NARDA/NESDA forms to eliminate the need for custom printed forms. If you have preprinted forms with this information already included, you can turn this flag off so that it does not print on your NARDA/NESDA forms twice.

ALWAYS REPRINT NESDA? Input (Y)es to always reprint the entire Nesda form. Some people prefer to reprint the entire NESDA form each time there is a change to it. Others may conserve forms and only print the sections that need to be updated. You can control how the forms are printed by selecting the appropriate method.

SKIP? Input (Y)es to skip the binding at the top of the Nesda form. This may be necessary on some NESDA forms.

ALWAYS PRINT TICKET? Input (Y)es to always print the entire ticket. Some people prefer to print the entire ticket each time there is a change to

it. Others would like to conserve paperwork and only print the sections that need to be updated. You can control how the tickets are printed by selecting the appropriate method.

CHECK? Input (Y)es to check serialized inventory availability. The serialized inventory can be checked to ensure that adequate inventory is available for the ticket. If you set this flag to Y, serialized inventory will be reserved when a serial number is allocated for a ticket. If the inventory is not available for a particular ticket, the operator will receive an error message indicating this condition.

Once all the parameters are entered, press the F9 key to update the parameters. You will be returned to the previous menu.

Transfer History Maintenance

It might become necessary to modify or delete the transfer history that is maintained on each ticket. See Figure 13-39.



Figure 13-39 Transfer History Maintenance Screen

You are provided with functions for adding, changing, deleting, or showing the transfer history on each service ticket. Figure 13-40 is an example of a transfer history record using the 'show'.

1 Maestro Music		5/08/06 1:37 pm
Ticket Number:	12.00	
Date:	6/23/04	
Time:	11:08	
Technician:	000012	
Employee:	101	
Aisle Out:	***	
Row Out:	**	
Tier Out:	*	
Aisle In:		
Row In:		
Tier In:		
Completed:		
Pick Up Date:		
Notes:	Brought in for service by customer.	
Notes:		
Serial Number:		
Model Number:		
Trak Code:	WTC	
Date:	6/23/04	
Press any key to continue		

Figure 13-40 Showing a Transfer History Example

Purchased From Maintenance

Purchase codes are established so that you may identify where an item was purchased. Predefining the codes eliminates the need to remember all purchase codes. An unlimited number of codes may be defined.

Maintenance functions are provided to add, change, delete, list, print and show Purchased From codes. See Figure 13-41.

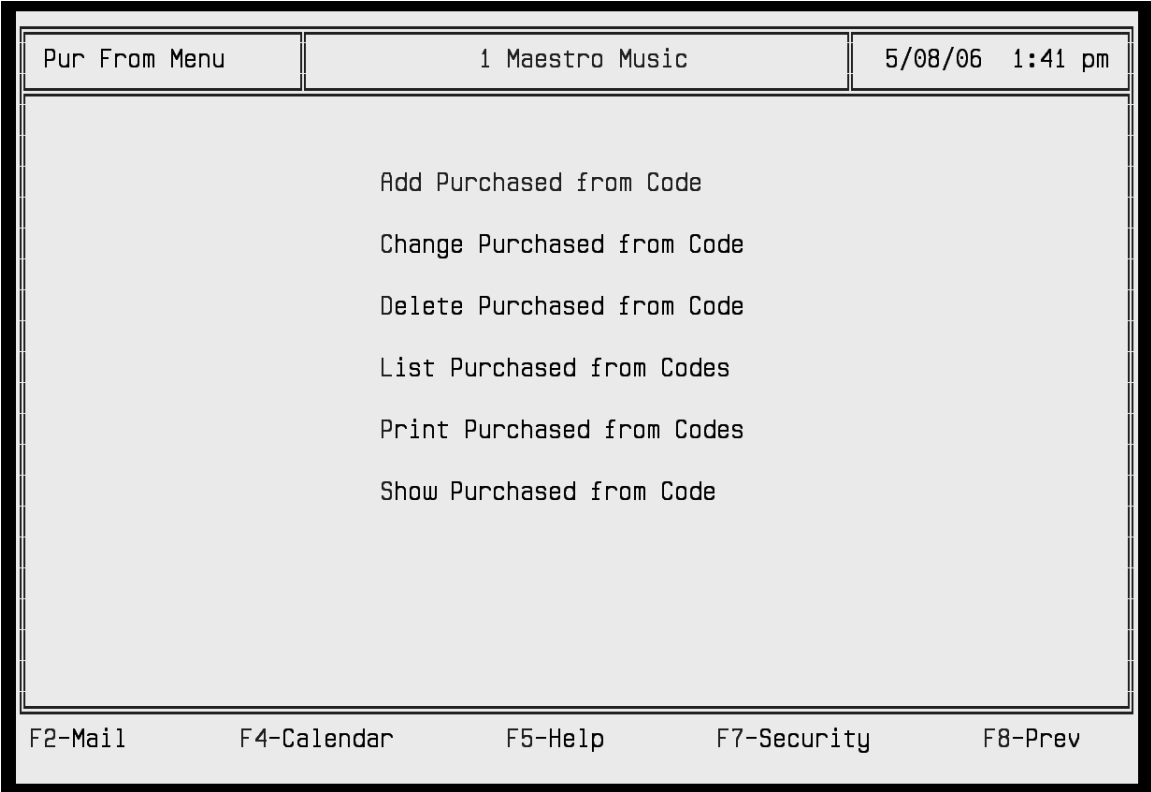


Figure 13-41 Purchased From Menu

New codes may be easily added by using the "Add Purchased From Code" option. See Figure 13-42.

Add Pur From	1 Maestro Music	5/08/06 3:31 pm
Purchased From: COM Description: Computerland Service Center: 333adN		
Input the service center number for this purchased from		

Figure 13-42 Add Purchased From Screen

PURCHASED FROM Input the company code you want to use for the company you purchased from.

DESCRIPTION Input the description for the company you purchased from.

SERVICE CENTER Input the service center number for the company you purchased from.

Any modifications to the Purchased From codes can be made using the "Change Purchased From Code". Purchased From codes may be removed from the database when they are no longer needed. See Figure 13-43 for the "Delete Purchased From Code" screen.

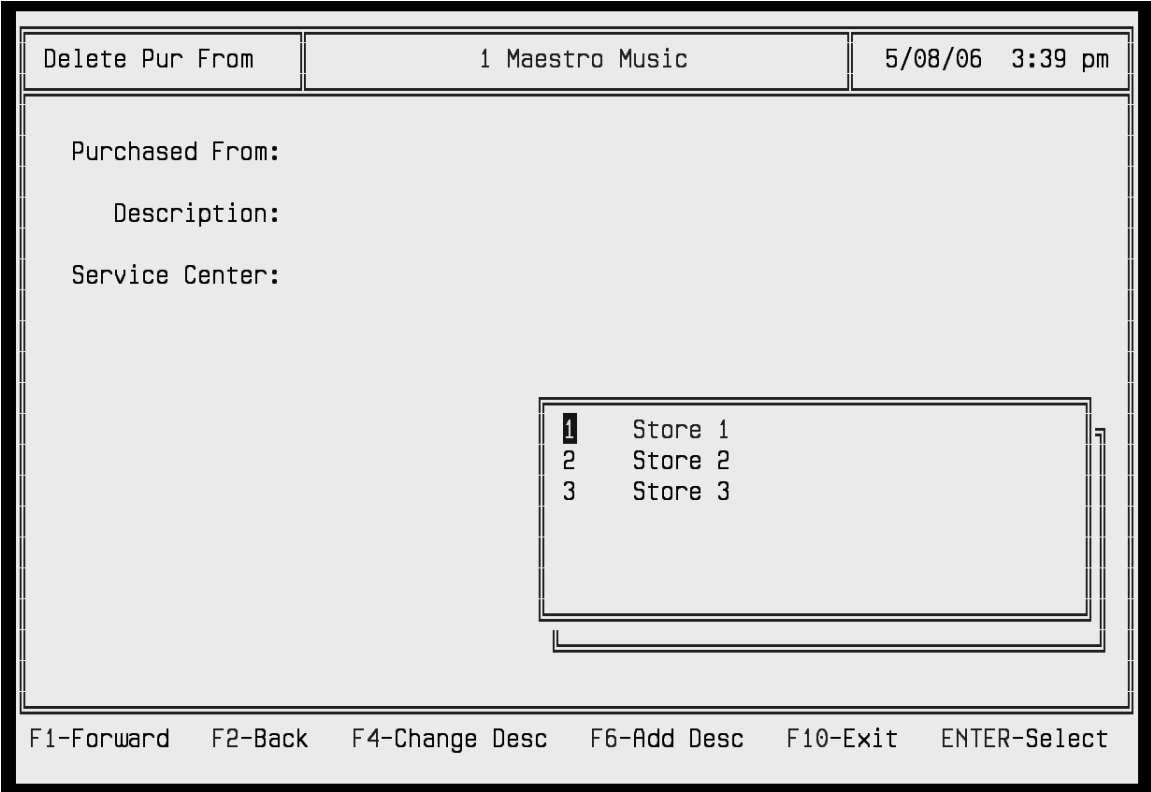


Figure 13-43 Delete Purchased From Screen with code lookup window

The Purchased From codes may be entered or selected from a lookup window. You may scroll through the list back and forth using the F1 and F2 keys. Once you have located the code you want to delete, select it by placing your cursor on the record to highlight it in the lookup window and press the ENTER key.

Once the code is selected, you will be prompted with a message to verify your selection before you delete this Purchased From code from the database. See Figure 13-44.

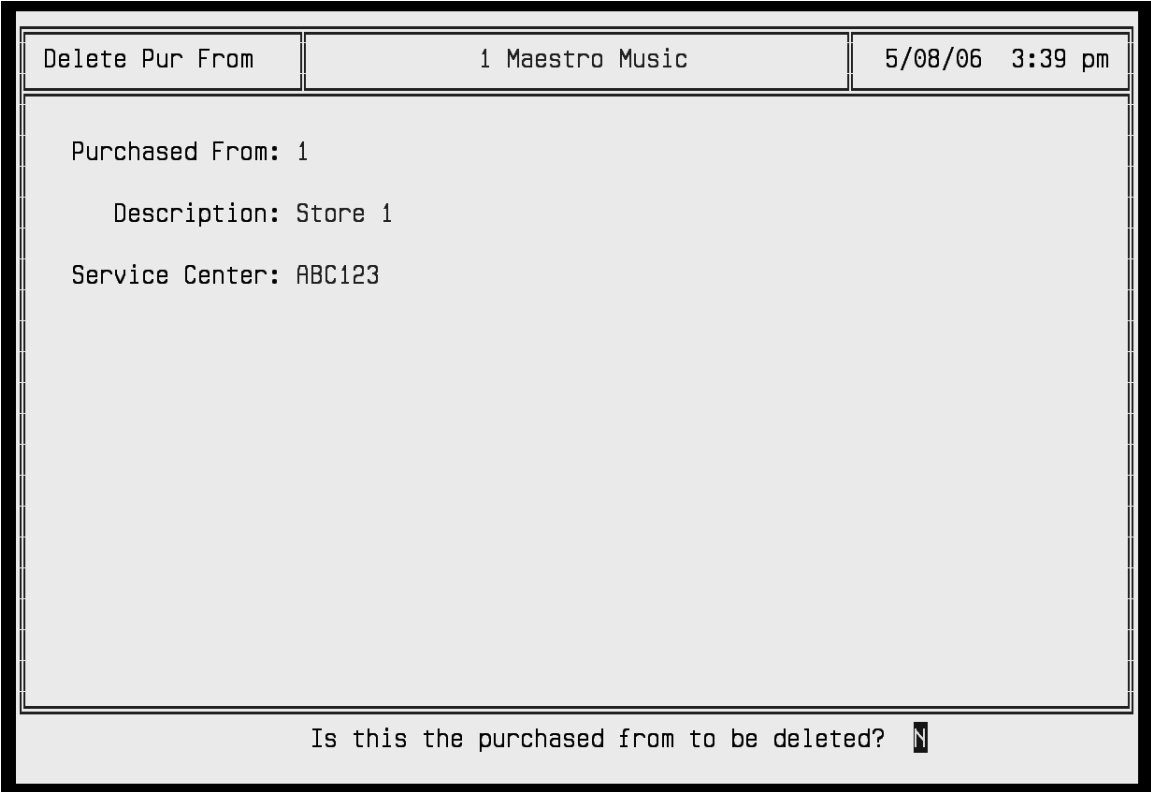


Figure 13-44 Delete Purchased From Screen

Enter a Y for yes to delete it or an N for no if you do not want to delete it after all. You may return the previous menu by pressing the F8 key.

You may view the Purchased From codes that are defined in the system using the "List Purchased From Codes" option. The list details the Purchased From Codes information. See Figure 13-45.

Print Pur From	1 Maestro Music	5/08/06 3:53 pm
----------------	-----------------	-----------------

Printer ID: P01
Control? No

Press F9 when finished entering all parameters

Input the printer ID on which to print the report

Figure 13-46 Print Purchased From Screen

PRINTER ID The printer id defaults to the printer set up in your operator record. This value may be overridden with another printer or filepath name.

CONTROL You may choose to let the software control the printer. This value also defaults to the setting found on your operator record and it too may be overridden.

Once all parameters are entered, press the F9 key to begin the print process. Figure 13-47 is an example of a printed Purchased From Report.

Date: 5/08/06	Purchased From Report	Page: 1
PURCHASED FROM	DESCRIPTION	SERVICE CENTER
1	Store 1	ABC123
2	Store 2	DEF123
3	Store 3	GHI123

Figure 13-47 Purchased From Report Example

A particular Purchased From code may be viewed using the "Show Purchased From Code" option. See Figure 13-48.

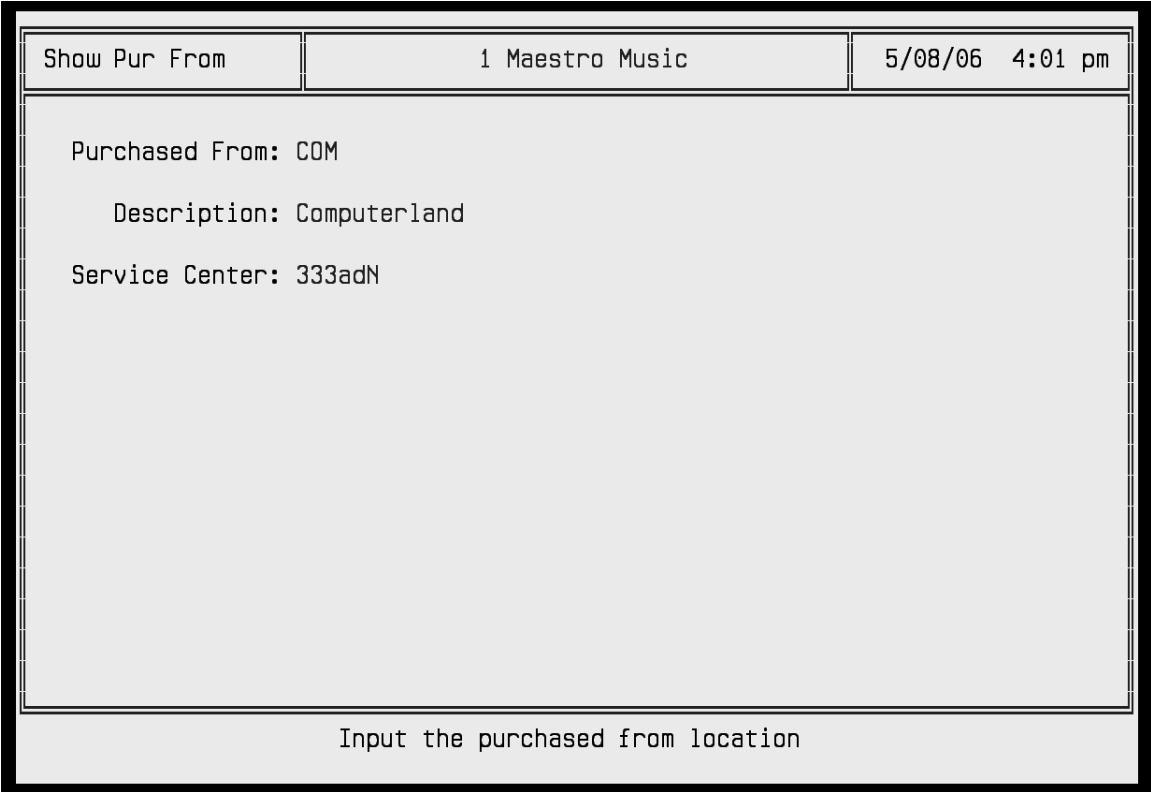


Figure 13-48 Show Purchased From Screen

The Purchased From code may be selected from a lookup window. Once the code is displayed, you do have any editing capabilities within "show". You may only "view" the code here. To return to the Purchased From Code Menu, press the F8 key.

Repair Code Maintenance

Repair Codes are established so that you may identify the type of service required and/or performed. See Figure 13-49.

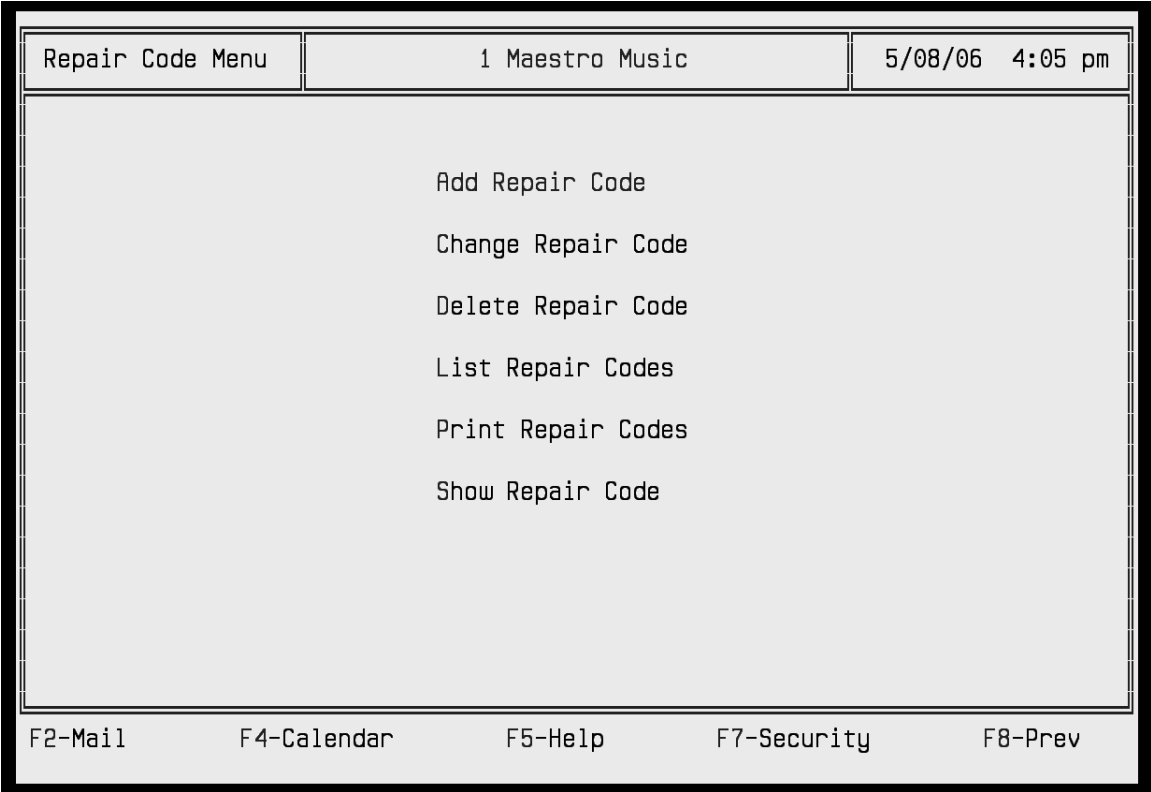


Figure 13-49 Repair Code (Srv Codes) Menu

Maintenance functions provided on this menu are add, change, delete, list, print and show Repair Codes. New codes may be easily added when necessary by using the "Add a Repair Code" option. See Figure 13-50.

Add Repair Code	1 Maestro Music	5/08/06 4:08 pm
<p>Repair code: CALI</p> <p>Code type: EIA-REPAIR</p> <p>Ref. No.: EIA-101332</p> <p>Description: CURCUIT CALIBRATION█</p>		
<p>Input the description that identifies this repair code</p>		

Figure 13-50 Add Repair Code Screen

REPAIR CODE Input the repair code you need to add.

CODE TYPE Enter the type of repair code it is.

REF. NO. Enter the reference number you want associated with this repair code.

DESCRIPTION Enter a description for this repair code.

Any necessary modifications to a repair code can be made using the "Change a Repair Code" selection. A repair code may be removed from the database when it is no longer needed by using the "Delete a Repair Code" option.

Once you have selected the repair code, you will be prompted to verify your selection before the code is actually deleted. See Figure 13-51.

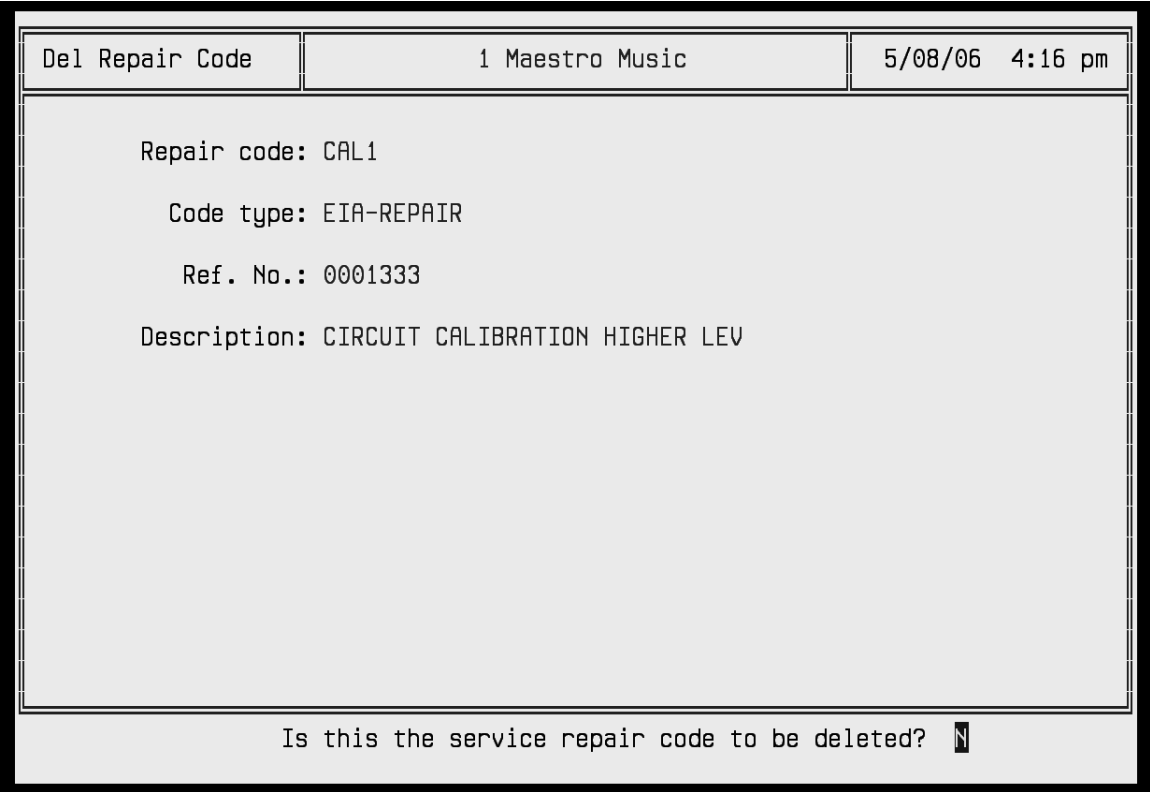


Figure 13-51 Delete Repair Code Screen

You may return to the Repair Code Menu by pressing the F8 key.

The repair codes within the database may be viewed using the "List Repair Codes" option. You have the option of displaying the sorted list that will appear in either the repair code or code type sort order. See Figure 13-52.

REPAIR CODE	TYPE	REF NO	DESCRIPTION
ABB	STRING		ADJUST BASS BRIDGE
ABK	BAND		ALIGN BENT KEYS
ADI	STRING		ADJUSTERS INSTALLED
ADJ	BAND		ADJUSTMENTS
AEB	STRING		ADJUST EXISTING BRIDGE
BBI	STRING		BASS BAR INSTALLED
BFF	BAND		BUFFING
BRF	BAND		BAND REPAIR
BRF	STRING		BRIDGE FITTING
BRH	BOW		BOW REHAIR
BSA	BOW		BOW SCREW ASSEMBLY
BSC	BOW		BOW STRAIGHTEN OR CAMBER
BSH	BOW		BOW SHORTEN HAIR
BTF	BOW		BUTTON FASTENED
BTI	BOW		BONE TIP INSTALLED
CALI1	EIA-REPAIR	0001333	CIRCUIT CALIBRATION HIGHER LEV
CALI	EIA-REPAIR	EIA-101332	CIRCUIT CALIBRATION
CEP	STRING		CORNERS & EDGES (PURFLING)
CGC	STRING		CRACKS GLUED & CLEATED
CGO	STRING		CRACKS GLUED/OUT, NO GAURANTEE
CLN	BAND		CLEANING
CLP	STRING		CLEANED & POLISHED
CMF	BAND		CHEMICAL FLUSH
COS	STRING		CLOSE OPEN SEAMS
CSE	BAND/STRNG		CASE WORK
DNT	BAND		DENT REMOVAL
DRU	BAND		DRUM HEAD INSTALLATION
EDB	STRING		END BLOCK
EPF	STRING		END PIN FITTING
ERP	ELECTRONIC		ELECTRONIC REPAIR
EYE	BOW		EYELET INSTALLED
FIF	BOW		FROG INSTALLED FULL LINED
FIH	BOW		FROG INSTALLED HALF LINED
FIP	BOW		FROG INSTALLED PLASTIC
FNI	STRING		FINGER BOARD NEW INSTALLED
FRE	STRING		FINGER BOARD RESURFACE EXISTNG
FRL	STRING		FINGER BOARD REGLUE LOOSE
FTJ	BAND		FIT JOINTS
GGP	BOW		GLUE GRIPS IN PLACE
GLS	BOW		GLUE LOOSE SLIDE
GRL	BOW		GRIP LEATHER
GRP	BOW		GRIP PLASTIC
GRS	GUITAR		GUITAR RESTRING
GTA	STRING		GUITAR ADJUSTMENT
GW	BOW		GLUE WEIGHT IN FROG
KBR	ELECTRONIC		KEYBOARD REPAIR
LAC	BAND		LAQUERING
LUB	BAND		LUBRICATED
NKB	STRING		NECK BLOCK
NNI	STRING		NEW NECK INSTALLED
OIL	BAND		OILED

Figure 13-54 Service Repair Code Report Example

A particular repair code may be viewed using the “Show a Repair Code” option. See Figure 13-55. Press the F8 key to go back to the previous menu.

Show Repair Code	1 Maestro Music	5/08/06 4:30 pm
Repair code: CALI Code type: EIA-REPAIR Ref. No.: EIA-101332 Description: CURCUIT CALIBRATION		
Input the brief description for the service repair code		

Figure 13-55 Show Repair Code Screen

Ship Via Maintenance

Shipment methods are predefined in order to provide a means of analyzing the different shipment methods by which merchandise arrives for repair. As many SHIP VIA codes can be assigned as required. The Ship Via Menu gives the options of adding, changing, deleting, listing, printing or showing a Ship Via code. See Figure 13-56.

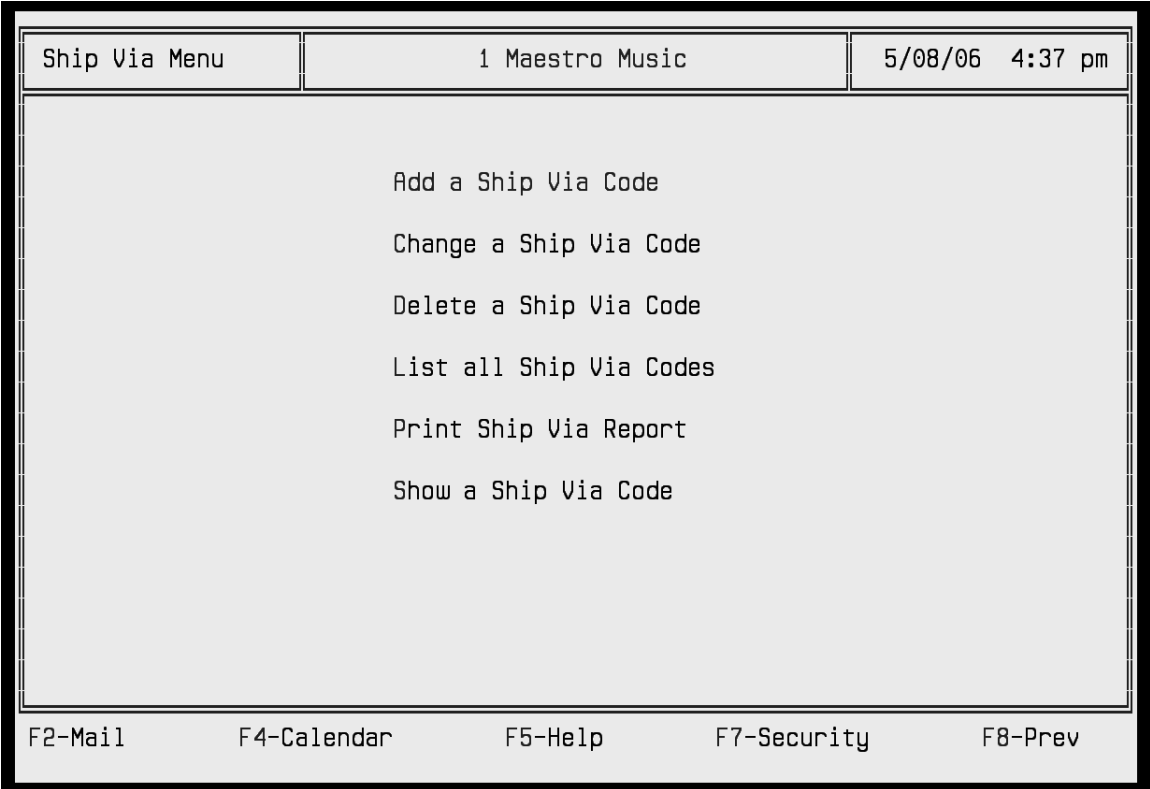


Figure 13-56 Ship Via Menu

The shipment codes are defined once. Each time you need to enter a code in an application, you are provided a lookup window. If you enter the code exactly as it is defined, the lookup window will be bypassed. The window only appears if the entry is not on file. See Figure 13-57 for an example of a lookup window.

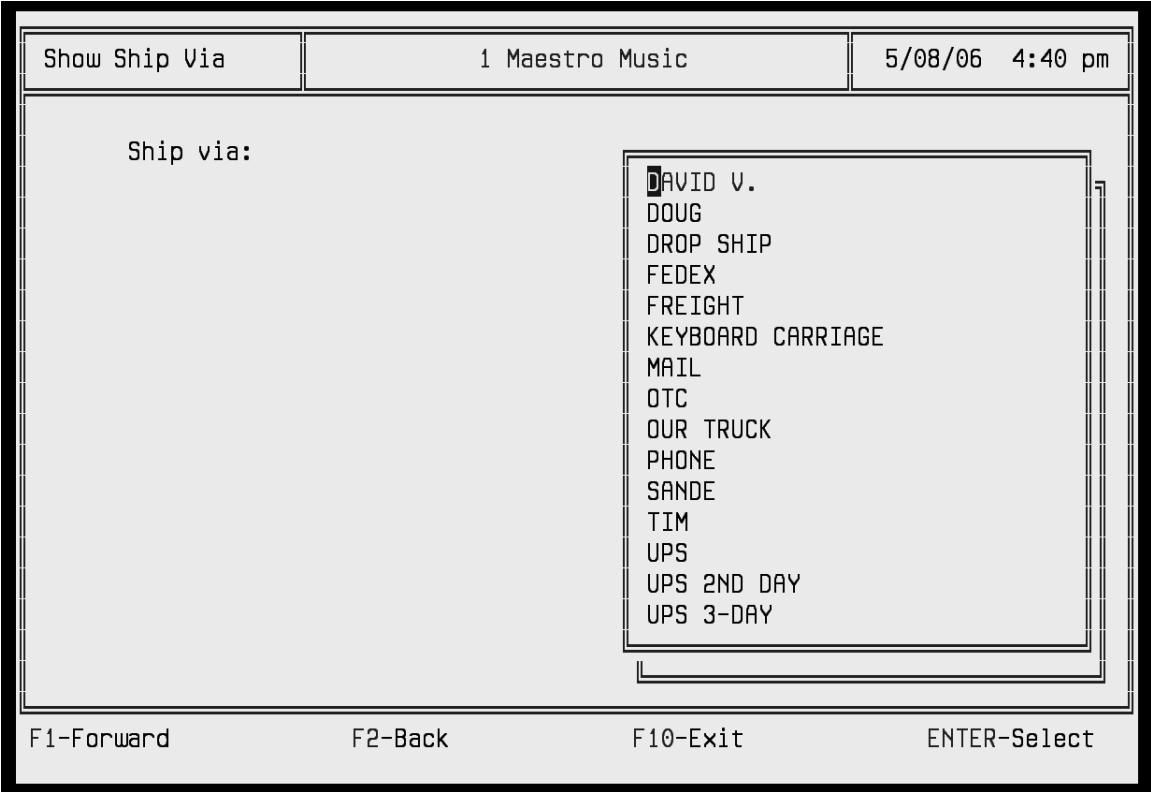


Figure 13-57 Show Ship Via Screen with lookup window

You can scroll backward or forward using the F1 and F2 keys until the desired shipment method is located. You have the option of including a text description for the shipment method to help you remember why you set up the code. This description does not appear elsewhere in the package. Therefore, you should make the 30 character description as explicative as possible. See Figure 13-58.

Show Ship Via	1 Maestro Music	5/08/06 4:45 pm
---------------	-----------------	-----------------

Ship via: DAVID V.

DAVID V. IS DROPPING OFF IS DROPPING OFF THE SERVICED ITEM TO THE CUSTOMER ON HIS WAY HOME. HE IS HAVING THEM SIGN NECESSARY PAPERWORK AND WILL BRING THE PAPERWORK BACK INTO THE OFFICE ON HIS NEXT DAY OF WORK.

Input the brief description for the ship via code

Figure 13-58 Show Ship Via method with explicative description

Modifications to the defined ship via code may be made using the "Change a Ship Via Code" option. A ship via code may be removed from the database using the "Delete a Ship Via Code" option.

You may enter the Ship Via Code or select it from a lookup window. Once the code has been selected, you will be prompted to verify your selection before the code is actually deleted. Enter a Y if this is the code you want to delete. See Figure 13-59.

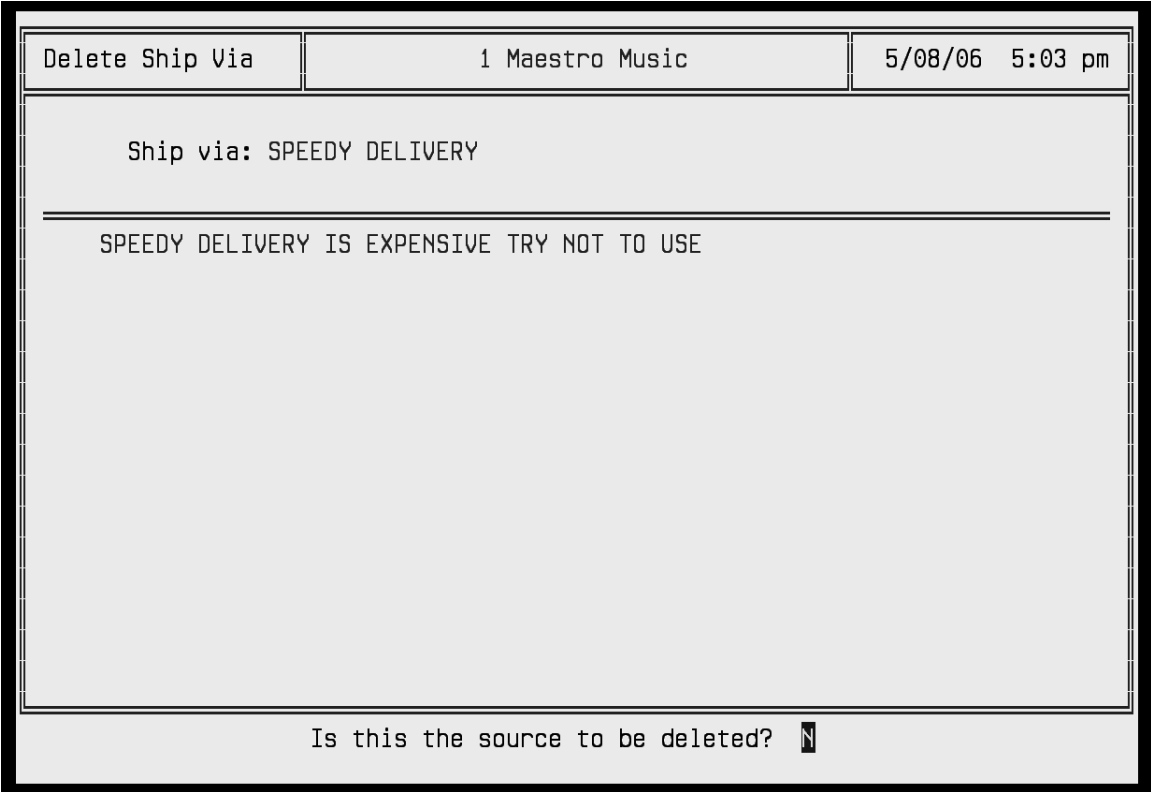


Figure 13-59 Delete a Ship Via Code Screen

Tax Code Maintenance

Tax codes are used extensively in the Accounts Receivable, Order Entry and Service modules. Each customer can participate in up to five unique tax jurisdictions.

You have the options on the Tax Code Menu to add, change, delete, list, print and show a tax codes. See Figure 13-60.

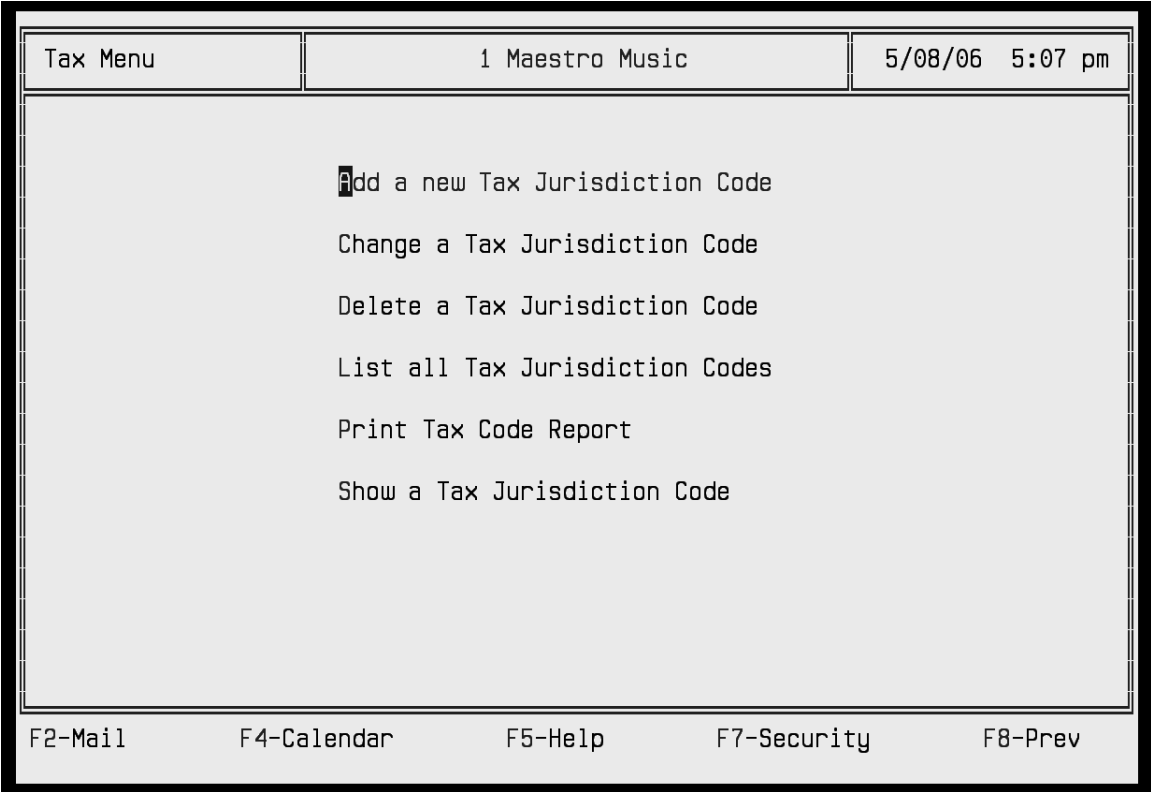


Figure 13-60 Tax Code Menu

Each tax jurisdiction is assigned a four digit number code. You can either, enter this code number or a few characters of the jurisdiction name and select it from a lookup window whenever you have to choose a tax code. See Figure 13-61 for an example of a tax code already defined.

Change Tax Code	1 Maestro Music	5/08/06 5:12 pm
Tax code:	1	
Rate:	8.1250	
Maximum:	9999.00	
Jurisdiction:	CORPUS CHRISTI	
G/L Account:	2400	
Profit Center:	1	
Input the tax rate for this jurisdiction		

Figure 13-61 Show a Tax Code

TAX CODE The tax code number for the record.

RATE The tax rate is the percent of tax that should be assessed for this particular jurisdiction.

MAXIMUM Many tax jurisdictions have a tax ceiling for purchases above a certain dollar amount. This amount is entered as the maximum tax amount to be charged for this tax code.

JURISDICTION A jurisdiction name of up to 30 characters helps to identify the tax codes if a large number of them are required. This name determines the sequence in which the tax codes appear in all lookup windows. Therefore, some care should be taken in developing a consistent pattern.

G/L ACCOUNT The general ledger account number associated with this tax code.

PROFIT CENTER The profit center number associated with this tax code.

Modifications to the defined tax code may be made using the "Change a Tax Jurisdiction Code " option. A tax code may be removed from the database using the "Delete a Tax Jurisdiction Code" option.

You may enter the tax code or select it from a lookup window. Once the selection is made, you will be prompted to verify your selection before the code is deleted. If

this is the code you want to delete, enter Y for yes to delete the code. See Figure 13-62.

Delete Tax Code	1 Maestro Music	5/08/06 5:23 pm
Tax code:	1	
Rate:	8.1250	
Maximum:	9999.00	
Jurisdiction:	CORPUS CHRISTI	
G/L Account:	2400	
Profit Center:	1	
Is this the tax code to be deleted? <input type="checkbox"/>		

Figure 13-62 Show a Tax Code

You may list the tax codes already defined using the “List all Tax Jurisdiction Codes” option. See Figure 13-63.

Tax Code Report	1 Maestro Music	5/08/06 6:04 pm
-----------------	-----------------	-----------------

Beginning Code: █ 0
 Ending Code: 0

Beginning Name:
 Ending Name:

Sort Option: Name

Printer ID: LP01
 Compress? No

Press F9 when finished
 entering all parameters

Input the beginning code to be included

Figure 13-65 Print Tax Code Report

BEGINNING CODE **ENDING CODE** Enter the beginning tax code and ending tax code (they will be included on the report) you want to appear on the report. You may leave these two fields blank to include all entries.

BEGINNING NAME **ENDING NAME** Enter the beginning jurisdiction name and ending jurisdiction name you want to appear on the report. You may leave these two fields blank to include all entries.

SORT OPTION The report has two sort options available. Sort by either (C)ode or (N)ame to sort the report by.

PRINTER ID The printer id defaults to the printer set up in your operator record. This value may be overridden with another printer or filepath name.

CONTROL You may choose to let the software control the printer. This value also defaults to the setting found on your operator record and it too may be overridden.

Once all the parameters are entered, press the F9 key to begin the printing process. Figure 13-66 is an example of a Tax Code Report.

CODE	JURISDICTION	RATE	TAX LIMIT
3	BROWN COUNTY	8.1750	9999.00
1	CORPUS CHRISTI	8.1250	9999.00
500	NON TAX	0.0000	0.00
2	NUECES COUNTY	8.1250	9999.00

Figure 13-66 Tax Code Report Example

Terms Code Maintenance

Payment terms codes eliminate the need to continuously enter archaic numbers in order to determine when payment is due and are used in most of the modules. They allow you to establish your basic terms one time and eliminate confusion at data entry time. With the Terms Code Menu, you can add, change, delete, list, print and show the terms codes. See Figure 13-67.

Terms Code Menu	1 Maestro Music	5/08/06 6:46 pm		
Add a Terms Code Change a Terms Code Delete a Terms Code List all Terms Codes Print Terms Report Show a Terms Code				
F2-Mail	F4-Calendar	F5-Help	F7-Security	F8-Prev

Figure 13-67 Terms Code Menu

The terms code is a 30 character alphanumeric field. You should enter something that is very explicative of the nature of the payment terms. Remember that a lookup window can be provided with the sequence being the terms code itself. See Figure 13-68.

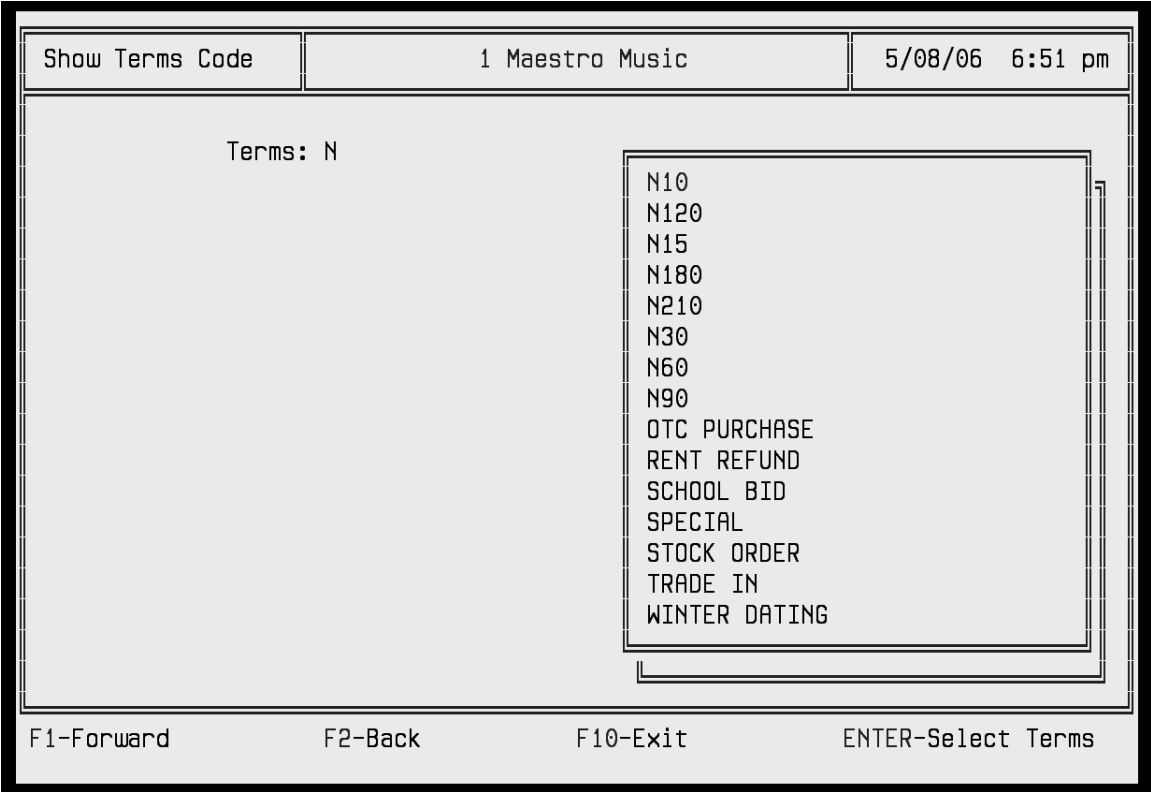


Figure 13-68 Show Terms Code Screen with lookup window

There are two areas of importance within each term code that you must define. The first area deals with when payment is considered due (e.g. "Net 30 days"). The second area offers a discount for payment received within a certain time frame. See Figure 13-69.

Show Terms Code	1 Maestro Music	5/08/06 6:52 pm
-----------------	-----------------	-----------------

Terms: N30

Due Month: 0
Due Day: 30

Discount Percent: 0.00
Discount Month: 0
Discount Day: 0

Input the brief description for the terms code that you want

Figure 13-69 Show Terms Code Screen

TERMS The terms code is a 30 character alphanumeric field. You should enter something that is very explicative of the nature of the payment terms.

DUE MONTH The number of months from the invoice date that payment is considered due. Nothing should be entered if the payment terms revolve solely around a number of days. Whatever is entered in this field will be added to the invoice month when calculating due date.

DUE DAY The number of days from the invoice date that payment is considered due. If this field is zero and the months field is zero the terms are effectively "COD". Figure 13-69 shows the setting for a "Net 30 Day" situation. may choose to let the software control the printer. This value also defaults to the setting found on your operator record and it too may be overridden.

DISCOUNT PERCENT The percent discount that will be allowed if payment is received within the time frame described by the discount months and days.

DISCOUNT MONTH The number of months from the invoice date that the discount will be allowed. Nothing should be entered if the discount terms revolve solely around a number of days. Whatever is entered in this field will be added to the invoice month when calculating the discount date.

DISCOUNT DAY The number of days from the invoice date that the discount will be allowed. If a discount percent is not entered, the discount months and days are irrelevant.

Modifications may be made to a terms code by using the “Change a Terms Code” option.

A terms code may be removed from the database by selecting “Delete a Terms Code” option off the Terms Code Menu. The terms code may be entered or selected from a lookup window. When the window is displayed, you may scroll through back and forth through the listing using the F1 and F2 keys. Place your cursor on the code you want to select (highlight the code you want) and press the ENTER key. The code will be retrieved and will display. See Figure 13-70.

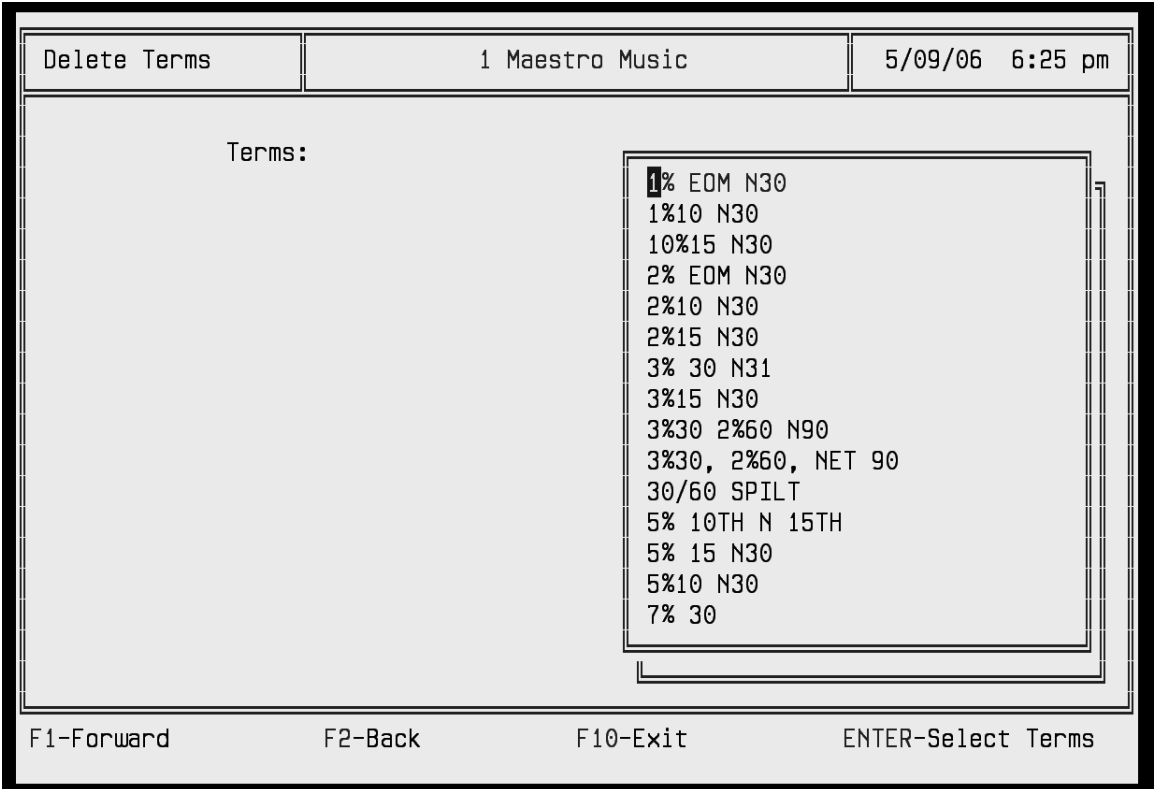


Figure 13-70 Delete Terms Code Screen

Once the code has been selected, you will be prompted to verify your selection before the code is deleted. See Figure 13-71.

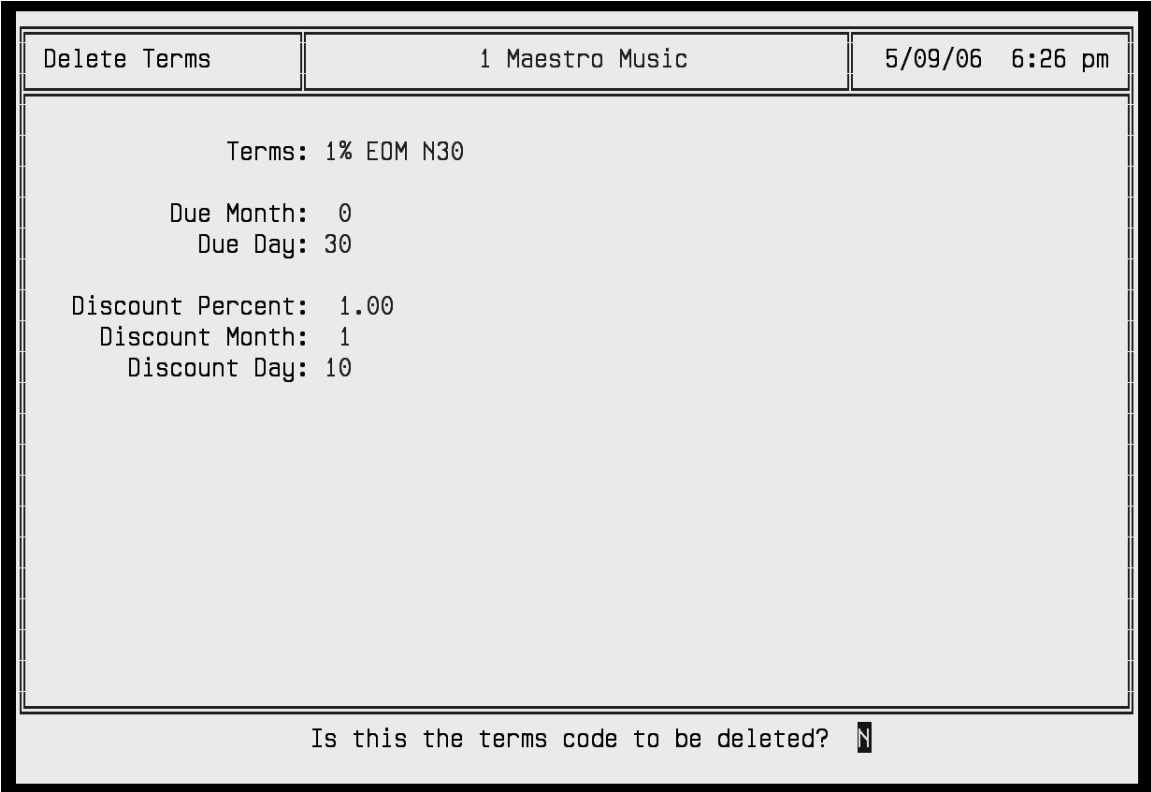


Figure 13-71 Delete Terms Code Screen with prompt

When you are done, you may return to the tax code menu by pressing the F8 key.

You may list all of the terms codes in the database by selecting the "List All Terms Codes" option.

An option is also provided for printing a Terms Code Report. See Figure 13-72.

Terms Report	1 Maestro Music	5/09/06 6:40 pm
--------------	-----------------	-----------------

Printer ID:
Control? No

Press F9 when finished
entering all parameters

Input the printer ID on which to print the report

Figure 13-72 Print Terms Report Screen

PRINTER ID The printer id defaults to the printer set up in your operator record. This value may be overridden with another printer or filepath name.

CONTROL You may choose to let the software control the printer. This value also defaults to the setting found on your operator record and it too may be overridden.

Once all the parameters are entered, press the F9 key to begin the printing process. See Figure 13-73 for an example of a Terms Code Report.

Date: 5/09/06		Payment Terms Report				Page: 1	
TERMS	DESCRIPTION	MON	DAY	DISC	MON	DAY	
1%	EOM N30	0	30	1.00	1	10	
1%	10 N30	0	30	1.00	0	10	
10%	15 N30	0	30	10.00	0	15	
2%	EOM N30	0	30	2.00	1	10	
2%	10 N30	0	0	2.00	0	0	
2%	15 N30	0	30	2.00	0	15	
3%	30 N31	0	31	3.00	0	30	
3%	15 N30	0	30	3.00	0	15	
3%	30 2%60 N90	0	90	3.00	0	30	
3%	30, 2%60, NET 90	0	90	3.00	0	30	
30/60	SPLIT	0	30	0.00	0	0	
5%	10TH N 15TH	1	15	5.00	1	10	
5%	15 N30	0	30	5.00	0	15	
5%	10 N30	0	30	5.00	1	10	
7%	30	0	30	7.00	0	30	
8%	30 N31	0	31	8.00	0	30	
	APPROVAL	0	0	0.00	0	0	
	BUYBACK	0	0	0.00	0	0	
	COD	0	0	0.00	0	0	
	CONSIGNMENT SALE	0	0	0.00	0	0	
	CREDIT CARD	0	0	0.00	0	0	
	FALL DATING	0	0	0.00	0	0	
	IN HOUSE	0	0	0.00	0	0	
	MASTER ORDER	0	0	0.00	0	0	
	N10	0	0	0.00	0	0	
	N120	9	15	55.00	0	0	
	N15	0	15	0.00	0	0	
	N180	0	0	0.00	0	0	
	N210	7	0	0.00	0	0	
	N30	0	30	0.00	0	0	
	N60	0	0	0.00	0	0	
	N90	0	0	0.00	0	0	
	OTC PURCHASE	0	0	0.00	0	0	
	RENT REFUND	0	0	0.00	0	0	
	SCHOOL BID	0	31	7.00	0	30	
	SPECIAL	0	0	0.00	0	0	
	STOCK ORDER	0	0	0.00	0	0	
	TRADE IN	0	0	0.00	0	0	
	WINTER DATING	0	0	0.00	0	0	

Figure 13-73 Terms Code Report Example

Trak Code Maintenance

Trak codes are used so that you may track a unit through it's repair cycle by using a predefined list of track codes. Predefining trak codes eliminates the need to remember all of your different tracking codes. An unlimited number of codes may be defined. Maintenance function provided on the Track Code Menu are add, change, delete, list, print and show Track Codes. See Figure 13-74.

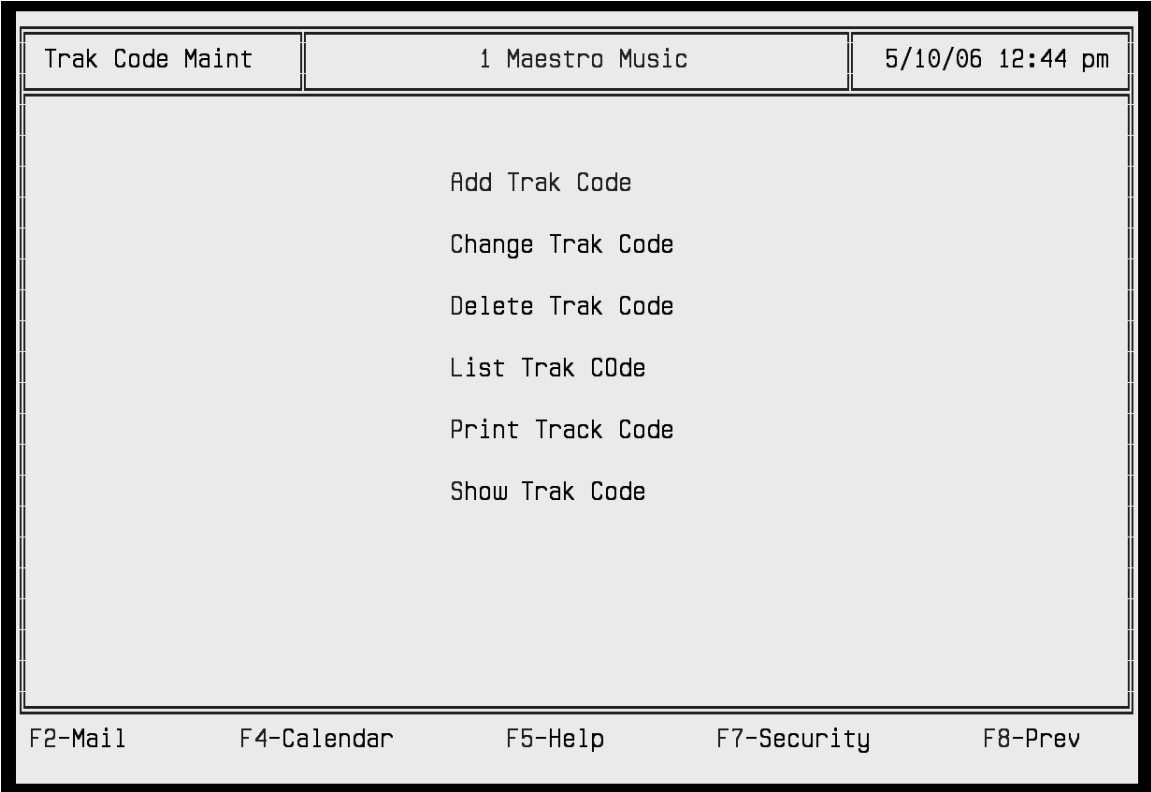


Figure 13-74 Trak Code Menu

New codes may be easily added by using the “Add Track Code” selection. See Figure 13-75.

Add Trak Code	1 Maestro Music	5/10/06 12:45 pm
Trak code: CLN		
Description: Clean Unit		
Input the description for this trak code		

Figure 13-75 Add a Trak Code Screen

TRAK CODE Enter the trak code you want to define.

DESCRIPTION Enter a brief description for the trak code you are defining.

After defining the trak codes, they become available in the lookup windows associated with this field.

Any modifications to the trak codes may be made using the "Change Trak Code" option.

Trak codes may be removed from the database when they are no longer needed using the "Delete Trak Code" option. The trak codes may be entered or selected from a lookup window. You may scroll back and forth through the listing using the F1 and F2 keys. Once you have located the code you want to delete, select it by placing the cursor on the code (highlights the line) and press the ENTER key. See Figure 13-76.

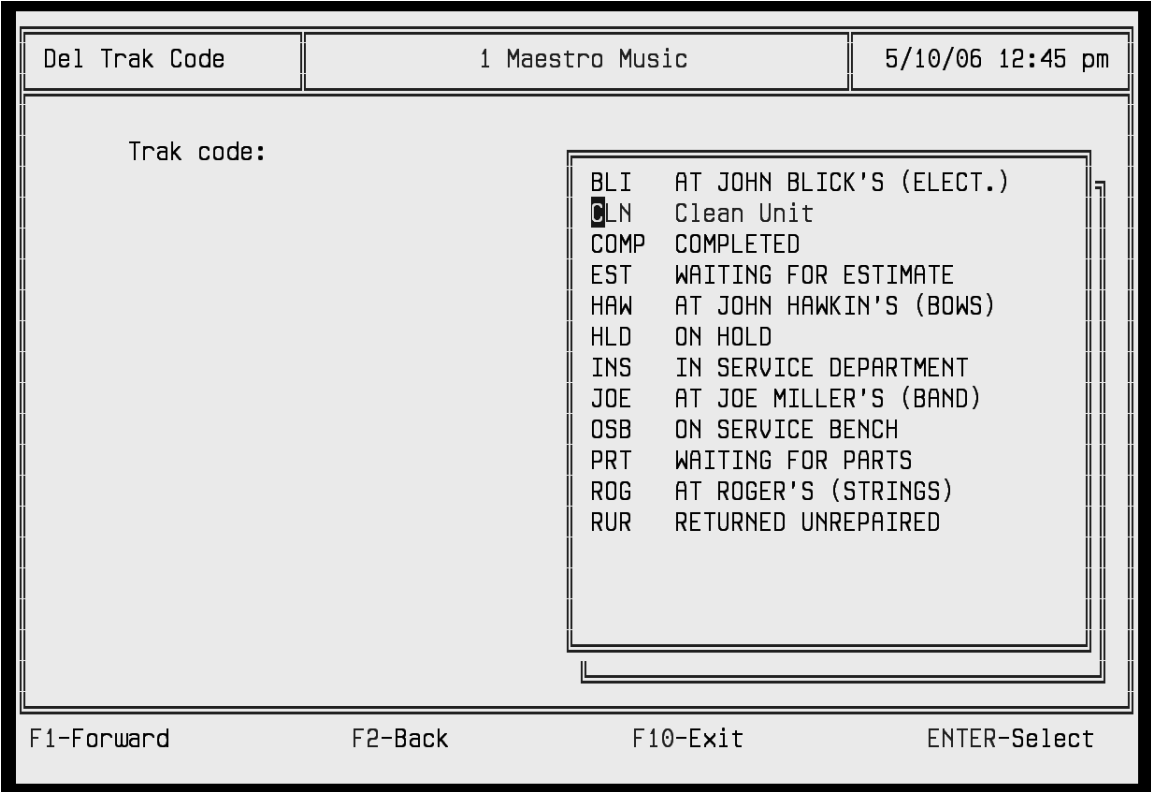


Figure 13-76 Delete a Trak Code Screen with lookup window

Once the code is selected, you will be prompted with a message to verify your selection before the code is deleted. See Figure 13-77.

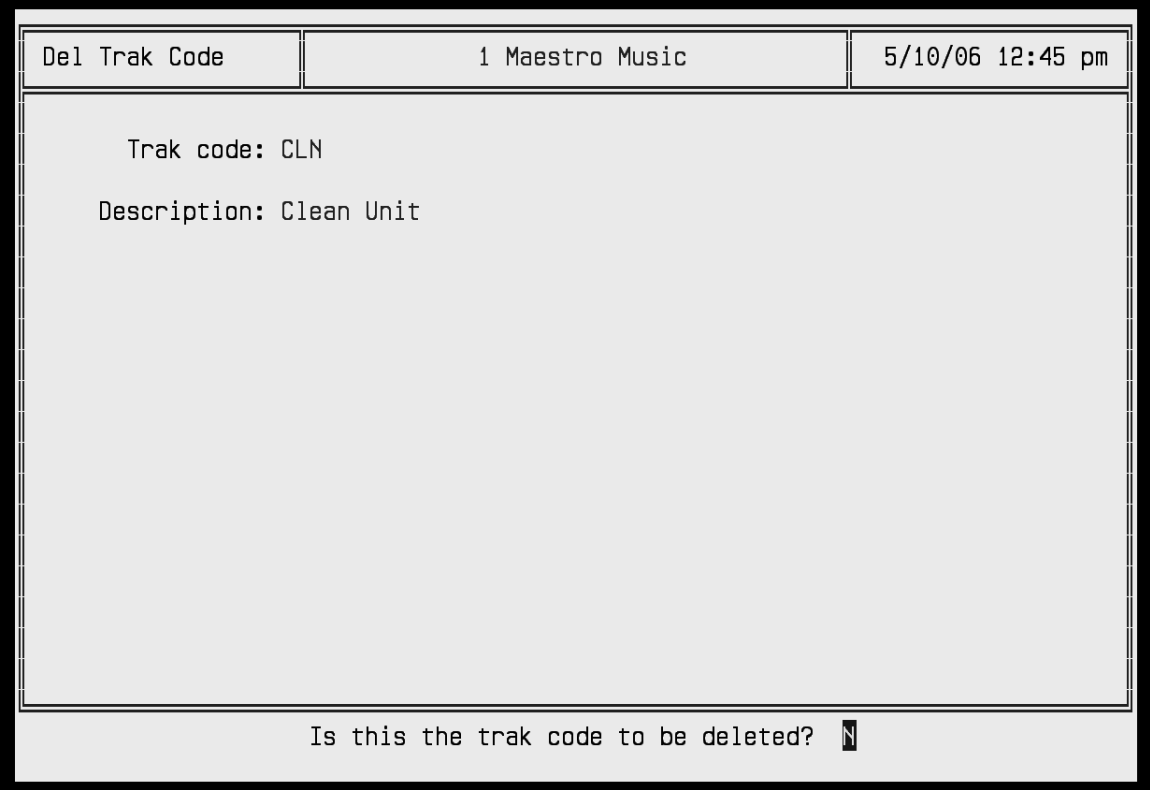


Figure 13-77 Delete a Trak Code Screen with message prompt

You may return to the Trak Code Menu by pressing the F8 key.