HITS Shop Suite – Service Center Manual

PDF guide on service center daily operational how to's in the HITS Shop Suite, including customer management, quoting, invoicing, inventory management, expense management, and end-of-day store closing procedures.

Created for the first-class, hardworking team at:

Last updated December 9th, 2025

“The greatest craftsman is not defined by the number of tools in their toolbox, but by their mastery of the ones they have.”

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1. HITS Shop Suite

HITS Shop Suite is a tire and auto service shop management system used by tire and auto shops across the U.S. and Canada. HITS has been around since 1985. HITS provides multiple platforms used by Gills Point S.

HITS POS – Cloud-based, enterprise point-of-sale system. HITS POS requires a Windows device (desktop, laptop, or tablet) with internet connection. Usage on personal devices must be approved by Gill's IT.

HITS Digital – Browser-based extension to HITS POS used for mobile access. Currently limited users at Gill's have access to HITS Digital.

HITS Tirelink Ecommerce – B2B ecommerce website platform used by Protech Wholesale (the wholesale division of Gill's) for selling to wholesale customers

HITS Integration Hub – HITS currently has 14 connected integrations into other tools and platforms used by Gill's Point S.

More information about HITS products can be seen at: gohits.com

2. HITS Support

Operations support for the HITS application is provided by Gill's IT Department.

Additional helpful information and resources can be found at these links:

- **Gill's Team Website**
- **The Hub Help Site**

For non-urgent requests or issues:

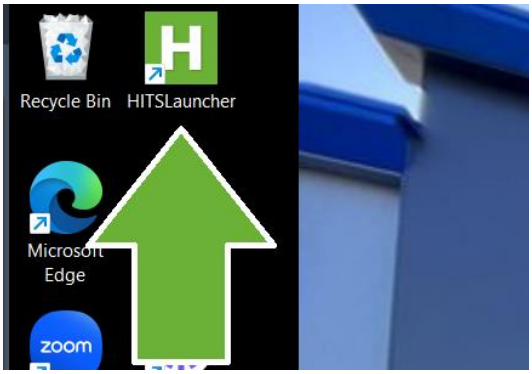
- Submit a ticket at: **thehub.gillstire.com** , OR
- Email: **help@gillstire.com**

For urgent requests or issues:

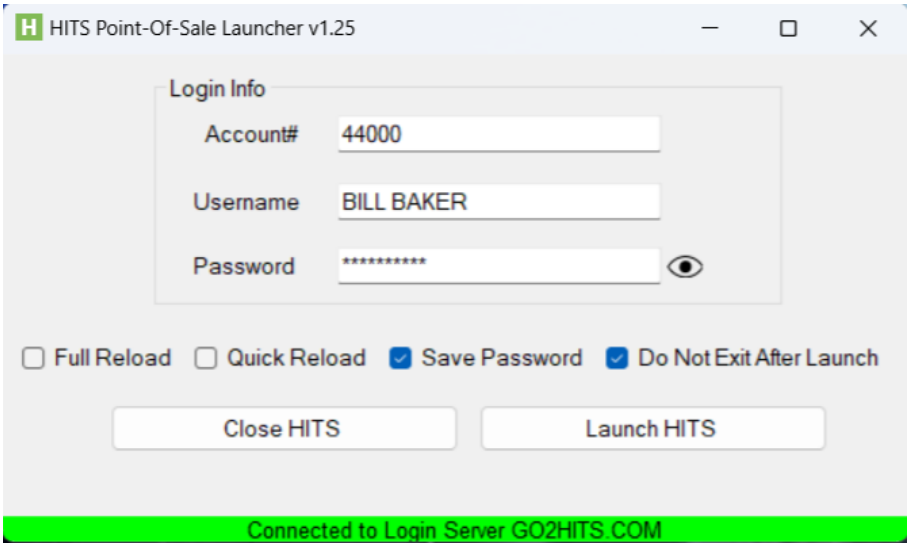
- Call **877-IT-GILLS** (**877-484-4557**) for immediate technical issues impacting daily operations.

3. Login, Access, General

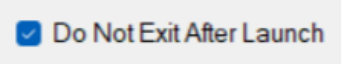
HITS POS can be accessed from any Windows computer that has been given security permission to access it. To launch the HITS Point-of-Sale, click the HITS icon on the desktop.



Enter the **Account**, **Username**, and **Password** provided by your Manager/ Corporate. Keep in mind that the password **will require CAPS LOCK** on your keyboard.

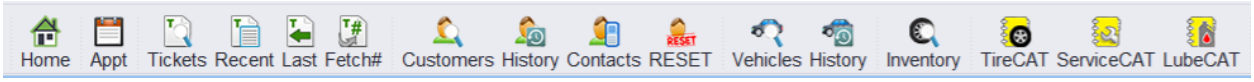


Make sure to leave the **Do Not Exit Launcher After** Login selected.

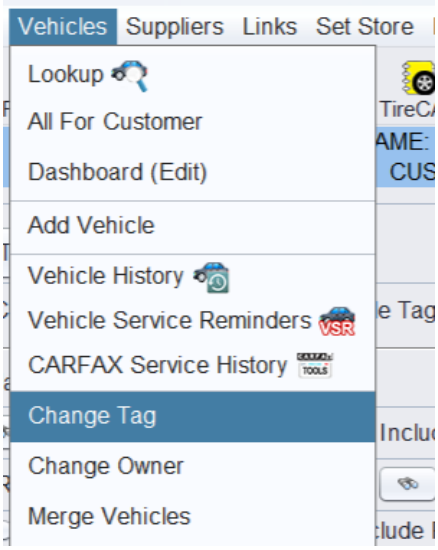


In the rare event the HITS Point-Of-Sale were to freeze or get locked, if you can access the Launcher, you can click the Close BPOS button to force the Point-Of-Sale to close, so you can restart it.

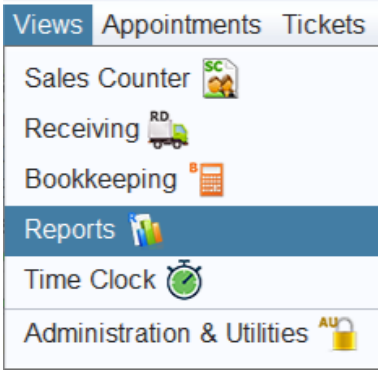
Most commonly used functions can be accessed from the main **toolbar** in the application. Over time, you may notice new functions being added to the toolbar.



Other functionality can be found on the drop-down **menus**.

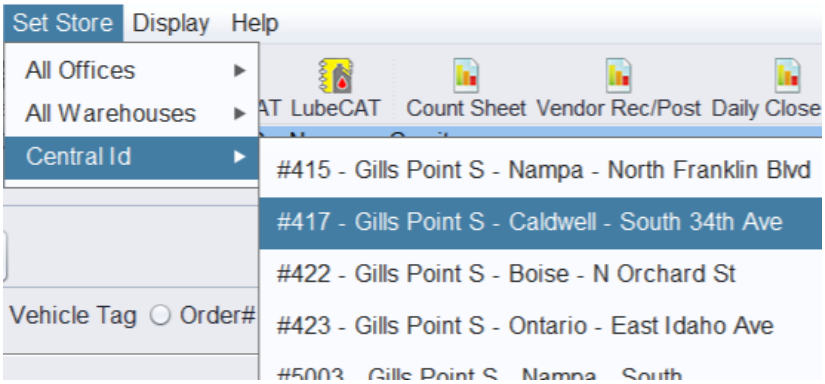


HITS contains different “views” for the various modules in the system, you may not use all modules or may not have permission to access certain modules or functions.

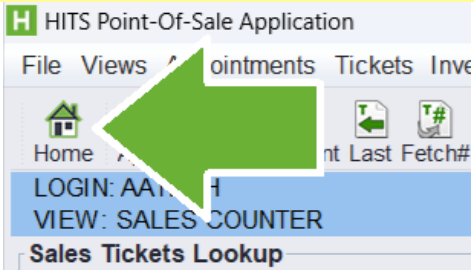


HITS is a **permission-based system** so there may be functions that only a Store Manager, District Manager, or Corporate Accountant can perform in HITS.

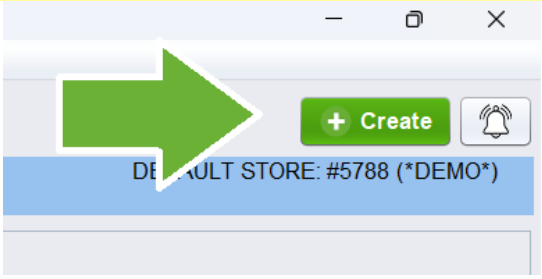
Some users will be able to access other locations in the HITS system. Other users will only be able to access their store. Users who can access more than one store will see the **Set Store** menu and can change their logged in store, by selecting the appropriate store.



IMPORTANT! HITS is a very robust system. If at any point you get lost in the system, you can always click **Home** (upper-left corner) to return to the tickets screen.

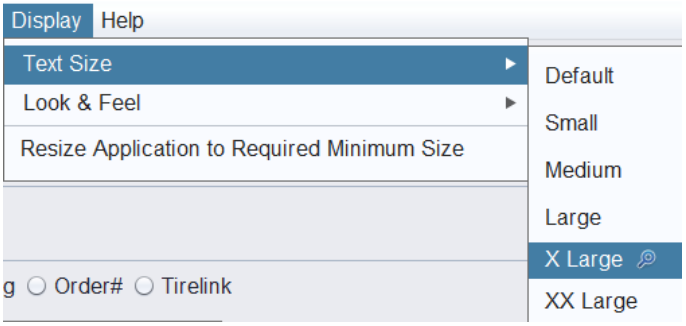


Additionally, any transaction type can be created by clicking the **Create** button (upper-right corner).



Display Size

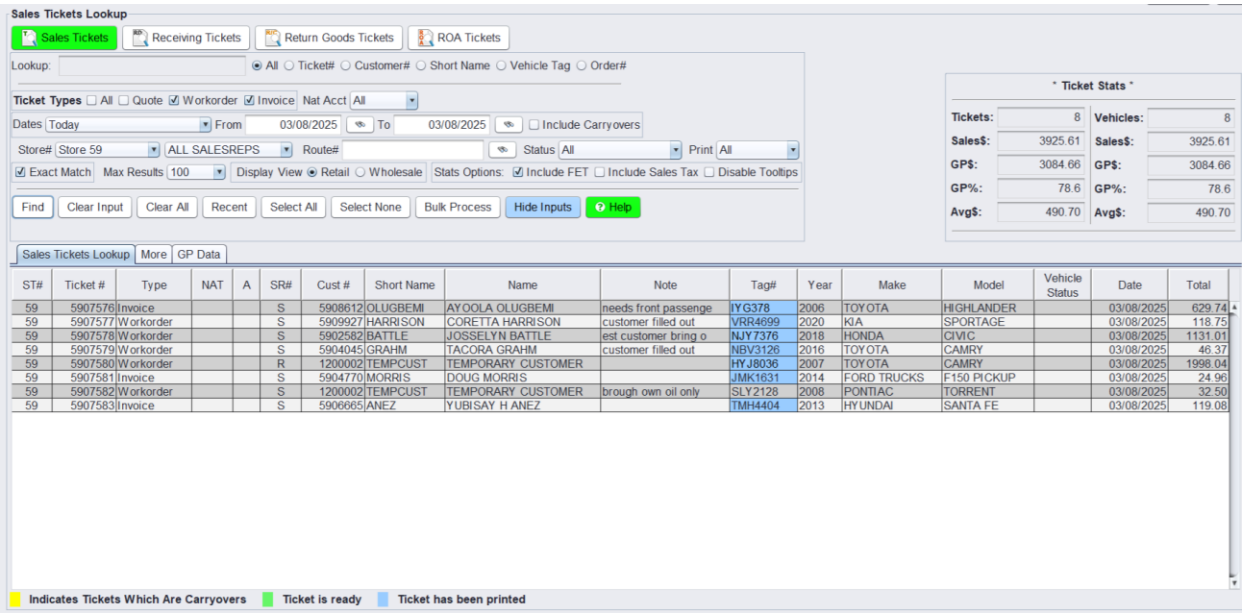
Based on your monitor size, changing the **text size** under the Display option may make the screen easier to read.



4. Sales Tickets (Workorders, Quotes, Batch, & Invoices)

When you log into HITS, the first screen you will likely click on is the Sales Ticket Lookup screen (also accessed via **Home** button).

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



The Sales Ticket Lookup also has **other filters** such Only National Account ticket, Vehicle Status, and Print Status which can be used to help find tickets.

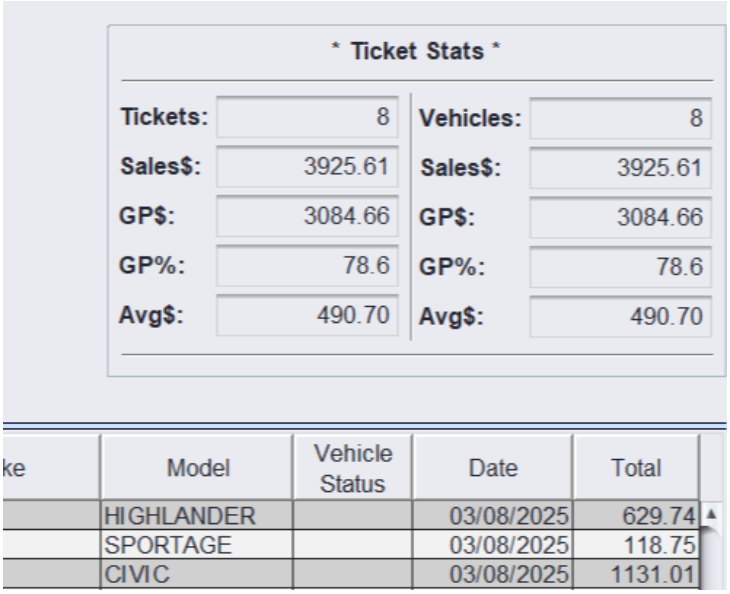
To help you narrow down your searches and time spent looking through tickets, they can easily be sorted by simply clicking on any header bar. That will arrange them in ascending or descending order depending on how many times you click, by that field.

ST#	Ticket #	Type	NAT	A	SR#	Cust #	Short Name	Name	Note	Tag#	Year	Make	Model	Vehicle Status	Date	Route	Total
971	-7418044	Quote			1	18817	ELLIE	ELLIE							11/17/2025		1113.60
971	-7418036	Quote			2	1329555	LOVE	JACK LOVE							11/17/2025		396.15
971	-7417735	Quote			2	1329662	PICKERING	STEVE/CASEY PICKERING		HMB401	2019	SUBARU	ASCENT		11/17/2025		1174.72
971	-7417684	Quote			2	18508	HASKINS	CARSON HASKINS							11/17/2025		845.67
971	-7417657	Quote			1	1329110	ARNOLD	MATTHEW ARNOLD							11/17/2025		938.28
971	-7417654	Quote			2	18491	ROBBINS	JIM ROBBINS							11/17/2025		1997.16
971	-7418205	Quote			1	1329966	HAYES	JODY HAYES							11/18/2025		1048.63
971	261550	Workorder			1	1329719	RIVARD	CHRIS RIVARD		GXT117	2023	RIVIAN	R1S		11/18/2025		0.00
971	267294	Workorder			1	16444	HO	MATTHEW HO	APPT 11/18/25	KXF367	2025	SUBARU	CROSSTREK		11/18/2025		894.00
971	269645	Workorder			1	1331047	PALMIERI	RICH PALMIERI	APPT 11/25/25						11/18/2025		870.50
971	272535	Workorder			1	1602932	PHILLIPS	KYLE PHILIPS	APPT 11/18/25	KAY489	2018	JEEP	GRAND CHEROKEE		11/18/2025		1256.08
971	276900	Workorder			2	1597558	JETTIE	BEN JETTIE	APPT 12/3						11/18/2025		903.08
971	277931	Workorder			1	1328870	COOPER MEC	COOPER MECHANICAL		519A389	2023	FORD	TRANSIT-350 HD		11/18/2025		180.00
971	277949	Workorder			2	1329946	SMITH	BRIAN SMITH		GWW818	2012	TOYOTA	PRIUS		11/18/2025		136.40
971	277953	Workorder			1	1297576	CRW CORPOR	CRW CORPORATION		NO TAG-51052	2020	VOLVO	XC90		11/18/2025		1203.74
971	277978	Workorder			2	18978	USHAKOVA	KRISTINA USHAKOVA		KCD449	2021	TOYOTA	RAV4 PRIME		11/18/2025		162.25

For example, if you are looking for a customer's work order by name in your list, clicking on the “name” tab, will put them all in alphabetical order.

SR#	Cust #	Short Name	Name ^	Note
1	1329059	SCHWARTZ	AARON SCHWARTZ	APPT 12/2/25
1	1328986	SMITH	ADAM SMITH	APPT 11/26/25
1	1329034	COTA	ANDREW COTA	APPT 11/22/25
1	16326	LECOURS	ANITA LECOURS	
1	10581	HAMMOND	ASHLEY HAMMOND	APPT 11/29/25
1	10581	HAMMOND	ASHLEY HAMMOND	APPT 11/28/25
1	17424	BADEAU	AUSTIN BADEAU	
2	1597558	JETTIE	BEN JETTIE	APPT 12/3
1	1329486	KEYSAR	BRADLEY KEYSAR	APPT 12/5/25
1	1329026	BYDLIK	BRIAN BYDLIK	CAME TO PICK UP WHEI
1	13437	FOLEY	BRIAN FOLEY	APPT 11/26/25
2	1329946	SMITH	BRIAN SMITH	
1	1297114	BUILDING E	BUILDING ENERGY	
2	1297114	BUILDING E	BUILDING ENERGY	
2	14079	EELLS	CAMERON EELLS	APPT 12/3/25
1	906697	TESTER	CARD TESTER	
0	906757	TESTER	CARD TESTER	
2	906697	TESTER	CARD TESTER	
2	18508	HASKINS	CARSON HASKINS	
2	1330899	BRUTKOSKI	CHARLES BRUTKOSKI	APT-11/19/2025-TIRES
2	1329043	FAULSTICK	CHARLOTTE FAULSTICK	APPT-11/10 FOR SMOKE
1	1329562	MCGOWAN	CHASE MCGOWAN	APPT 11/19/25
1	1329719	RIVARD	CHRIS RIVARD	

Depending on your search criteria on this screen, the KPI's in the upper-right hand corner **will reflect the current results showing on the screen**.



* Ticket Stats *

Tickets:	8	Vehicles:	8
Sales$:	3925.61	Sales$:	3925.61
GP$:	3084.66	GP$:	3084.66
GP%:	78.6	GP%:	78.6
Avg$:	490.70	Avg$:	490.70

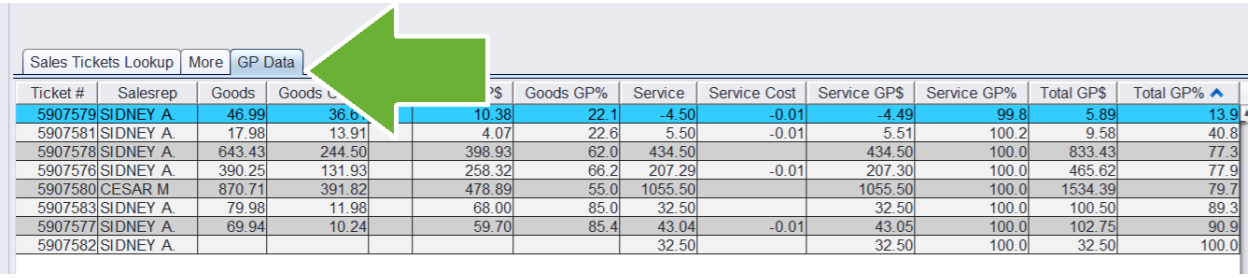
ke	Model	Vehicle Status	Date	Total
	HIGHLANDER		03/08/2025	629.74
	SPORTAGE		03/08/2025	118.75
	CIVIC		03/08/2025	1131.01

So, if you have searched for example, ONLY Open Workorders, the totals will only reflect Open WORKORDERS.

To see your current finalized sales for the day, click to Batch and Invoice ticket types and then FIND.

Ticket Types ☐ All ☐ Quote ☐ Workorder ☑ Batch ☑ Invoice

Gross Profit $ and % will be shown in the KPI section as well as the **GP Data** tab on the Sales Ticket Lookup screen. Use this tab to see GP by Ticket.



Sales Tickets Lookup | More | GP Data

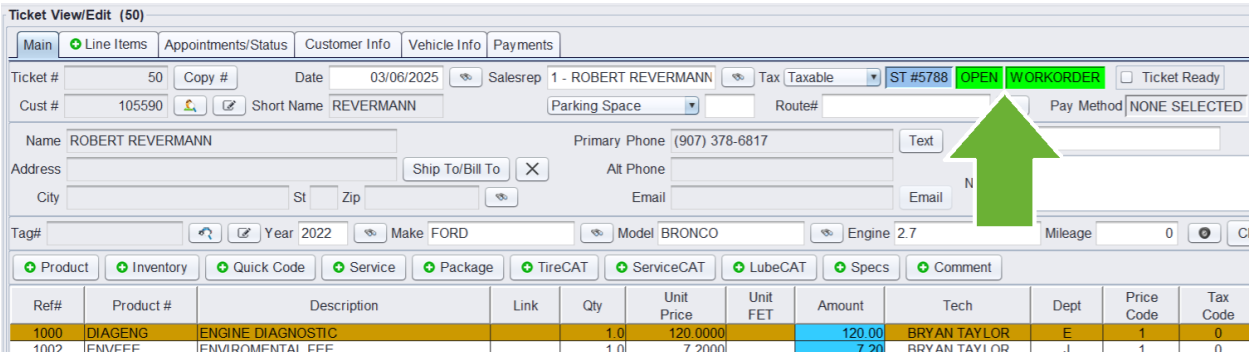
Ticket #	Salesrep	Goods	Goods	$	Goods GP%	Service	Service Cost	Service GP$	Service GP%	Total GP$	Total GP%
5907579	SIDNEY A.	46.99	36.6	10.38	22.1	-4.50	-0.01	-4.49	99.8	5.89	13.9
5907581	SIDNEY A.	17.98	13.91	4.07	22.6	5.50	-0.01	5.51	100.2	9.58	40.8
5907578	SIDNEY A.	643.43	244.50	398.93	62.0	434.50		434.50	100.0	833.43	77.3
5907576	SIDNEY A.	390.25	131.93	258.32	66.2	207.29	-0.01	207.30	100.0	465.62	77.9
5907580	CESAR M	870.71	391.82	478.89	55.0	1055.50		1055.50	100.0	1534.39	79.7
5907583	SIDNEY A.	79.98	11.98	68.00	85.0	32.50		32.50	100.0	100.50	89.3
5907577	SIDNEY A.	69.94	10.24	59.70	85.4	43.04	-0.01	43.05	100.0	102.75	90.9
5907582	SIDNEY A.					32.50		32.50	100.0	32.50	100.0

IMPORTANT! The gross profit figures in HITS are estimated, not final and are meant for guidance on performance.

True accounting profit will vary from 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.

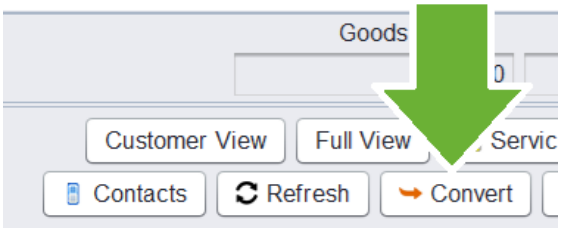
The gross profit figures in HITS can be used as a guide to advise if your day/ week/ month is on track but be sure to always validate final profitability figures with your store's P&L reports.

In HITS, the sales ticket type can be seen on the Ticket Lookup screen and on the opened ticket:



- **Quotes** are OPEN tickets that can be provided to the customer for pricing. Products on Quotes <u>do not allocate</u> items from inventory. Quotes stay in the system for 30 days(by default) and can be accessed within Customer History.

  If the customer decides to go forward with the quoted services, Quotes can be converted to a Workorder by clicking the **Convert** button.



Quotes must be converted to Workorders before parts can be ordered through the system. When Quotes are converted to Workorders, inventory will be allocated. Work orders cannot be converted back to a Quote after being converted.

Quotes can also be transferred from store-to-store using the **Set Store** button.

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

  When placing electronic orders through the system, the Workorder # will be used automatically as the PO#. The Workorder # will stay the same ticket number as the finalized Invoice.

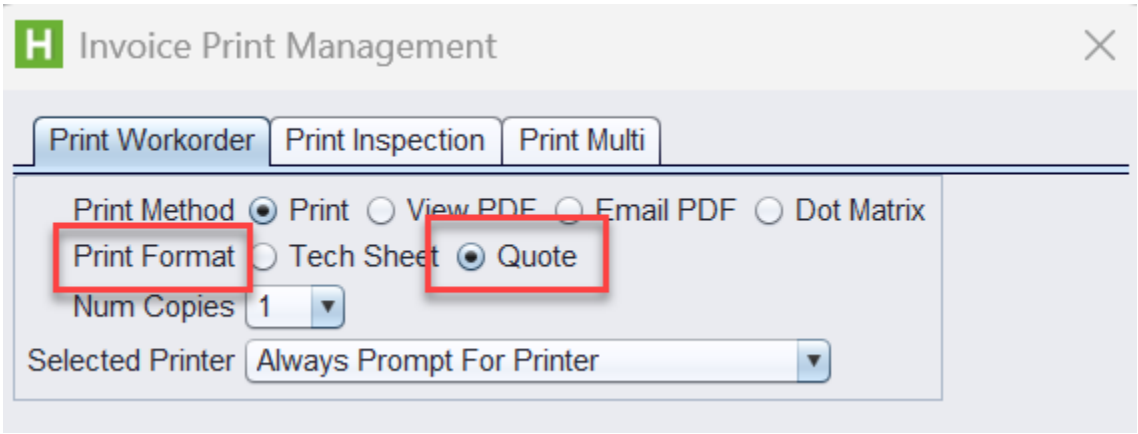
  When the end-of-day closing process is performed, any remaining Open Workorders will be pushed forward as "**Carryover**" tickets. These tickets will show as highlighted yellow at the bottom of the Sales Ticket lookup screen.

Sales Tickets Lookup | More | GP Data

ST#	Ticket #	Type	NAT	A	SR#	Cust #	Short Name	Name	Note	Tag#	Year	Make	Model	Vehicle Status	Date	Total
59	5907577	Workorder			S	5909927	HARRISON	CORETTA HARRISON	customer filled out	VRR4699	2020	KIA	SPORTAGE		03/08/2025	118.75
59	5907578	Workorder			S	5902582	BATTLE	JOSSELYN BATTLE	est customer bring o	NJY7376	2018	HONDA	CIVIC		03/08/2025	1131.01
59	5907579	Workorder			S	5904045	GRAHM	TACORA GRAHM	customer filled out	NBV3126	2016	TOYOTA	CAMRY		03/08/2025	46.37
59	5907580	Workorder			R	1200002	TEMPCUST	TEMPORARY CUSTOMER		HYJ8036	2007	TOYOTA	CAMRY		03/08/2025	1998.04
59	5907582	Workorder			S	1200002	TEMPCUST	TEMPORARY CUSTOMER	brough own oil only	SLY2128	2008	PONTIAC	TORRENT		03/08/2025	32.50
59	5907584	Workorder			R	1200002	TEMPCUST	TEMPORARY CUSTOMER		566SZZ	2010	HYUNDAI	ELANTRA		03/08/2025	1081.75
59	5907585	Workorder			S	5904433	RASCO	DAVID RASCO		PMM3395	2011	TOYOTA	CAMRY		03/08/2025	540.38
59	5907335	Workorder			S	5903559	BANKS	SHEENA BANKS	will be back needs m	GXT0379	2013	KIA	OPTIMA		02/22/2025	1565.24
59	5907345	Workorder			R	5909803	SAM	SAMMER SAM	waiting on parts pri	VPN4587	2017	FORD	F150		02/24/2025	0.00
59	5907385	Workorder			S	5909822	WILLIAMS	ALEXANRIA WILLIAMS	applying for AFF wil	ET64071	2011	NISSAN	ROGUE		02/26/2025	947.94

Store Managers are responsible for keeping their Carryover tickets accurate. Open Carryover Workorders for cases like customers no-showing, should be closed, as Open Workorders will affect Available inventory.

Workorders can be printed as a quote when needed, to provide a copy of the work to be performed to receive authorization or a PO #. To do this, select Print at the bottom of the ticket or ALT-P. Make sure to change Print Format to "Quote."



- **Batch** - When a customer is "cashed out" and the Workorder is closed, the ticket will become a Batch Invoice.

  ST #1 BATCH INVOICE

  A Batch Invoice is the same as a finalized Invoice, however, users with permission can re-open the Batch Invoices prior to the end-of-day closing to fix any discovered clerical errors on the ticket. A Batch Invoice ticket is considered a "soft-closed" ticket.

- **Invoice** – During the end-of-day closing process, Batch Invoices will be finalized and can no longer be edited.

5. Invoicing

This section will detail the various topics relative to customer management, quoting, and invoicing.

a. Quotes and Workorders

Important! Good customer data is a cornerstone of the success of Gills Point S from the technician to the corporate office – everyone is affected by having and maintaining good customer data.

With good customer data, we can take better care of our customers' vehicles, provide them with a seamless customer experience, and drive their repeat business back into our shop through post-sale marketing. Performance will be measured on maintaining good customer data.

There are numerous ways to create new Quotes and Workorders in HITS. However, best practices will be detailed below.

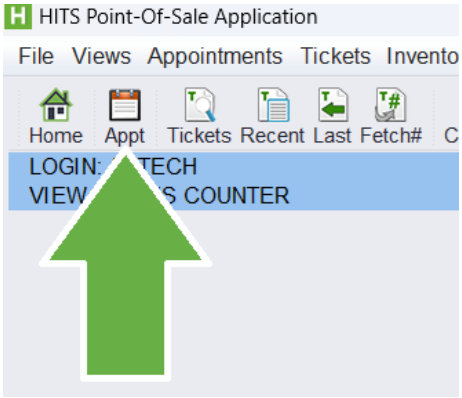
There are three primary retail customer sales interactions in a Service Center:

- **Customer showing up for an appointment**
- **A return customer walking-in/ dropping-off**
- **A new customer walking-in/dropping-off**

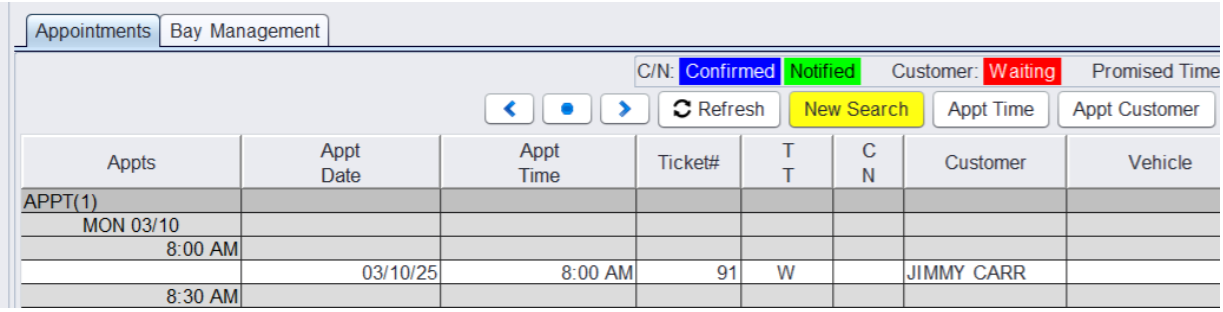
These questions will guide how to start a Quote/ Workorder for the customer:

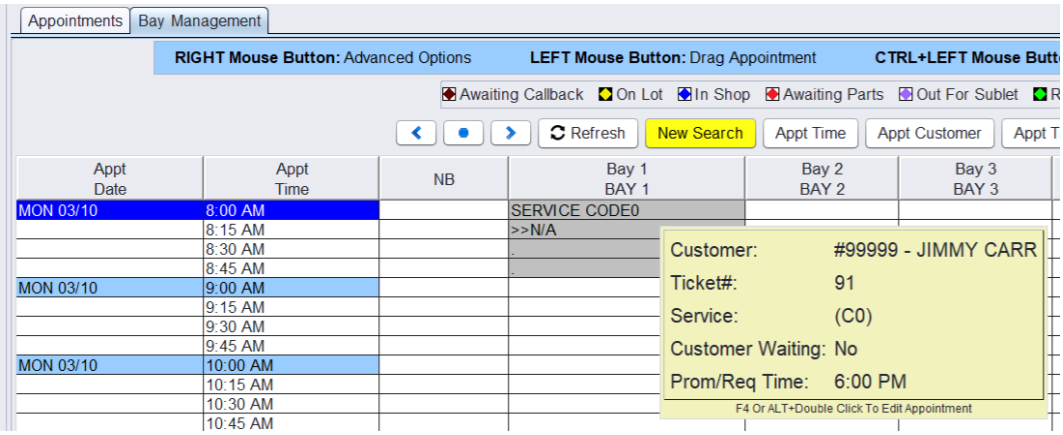
- **How can we help you today?**
- **Do you have an appointment scheduled?**
- **Have you ever been to a Gills Point S *or [acquired shop name]*?**

If the customer has booked an appointment online and the appointment was added correctly into HITS, go the **Appointment** (**Appt**) icon on the toolbar.



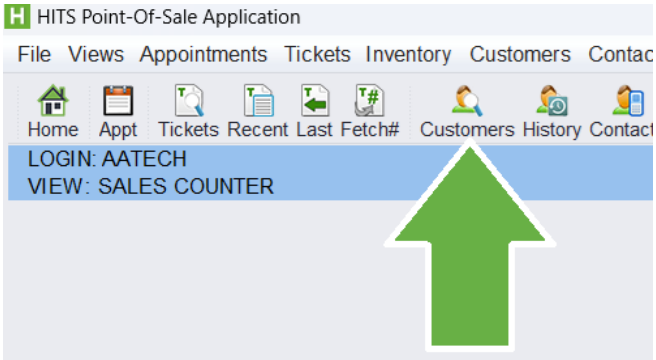
From the Appointment List or Bay Management screen, click on the correct appointment and the customer's Quote or Workorder ticket will load.





Appointments will be detailed further in the Appointment section of this guide (*see the Table of Contents for page #*).

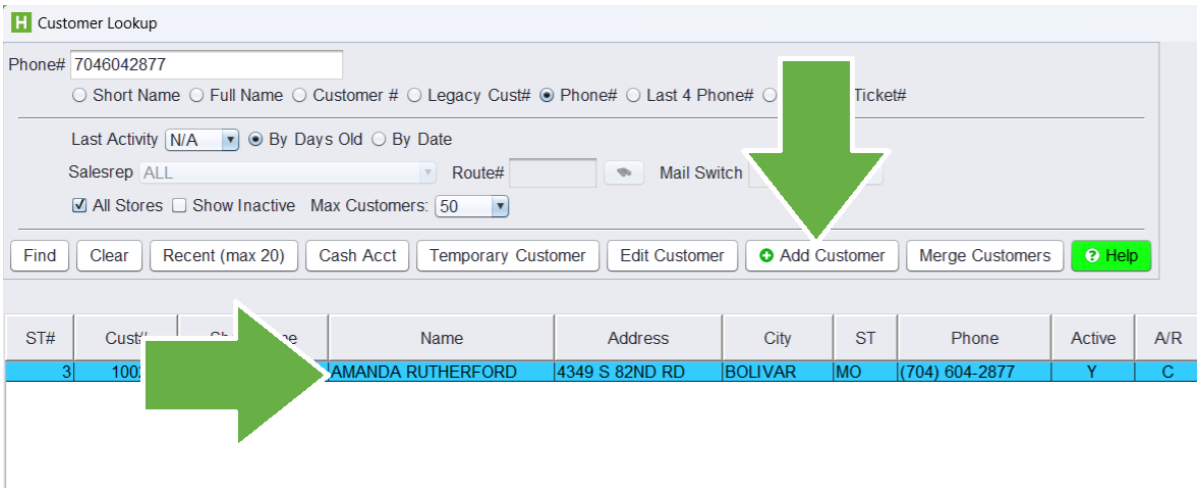
If the customer does not have a scheduled appointment, go to the **Customer Lookup** icon on the toolbar to either find a return customer or add a new customer.



Important! It is recommended to ask the customer's phone. This will help you either find the retuning customer's record or quickly add the customer into the system.

Consider that even if the customer has not been in Gills Point S or [*acquired shop name*] they may have visited another shop in the nation that is now owned by Gills Point S so their information may already be in the system.

Type in the customer's phone number and hit ENTER (or click FIND).



>>> If the customer is found, click on the customer.

>>> If the customer is not found, click on the **Add Customer** button

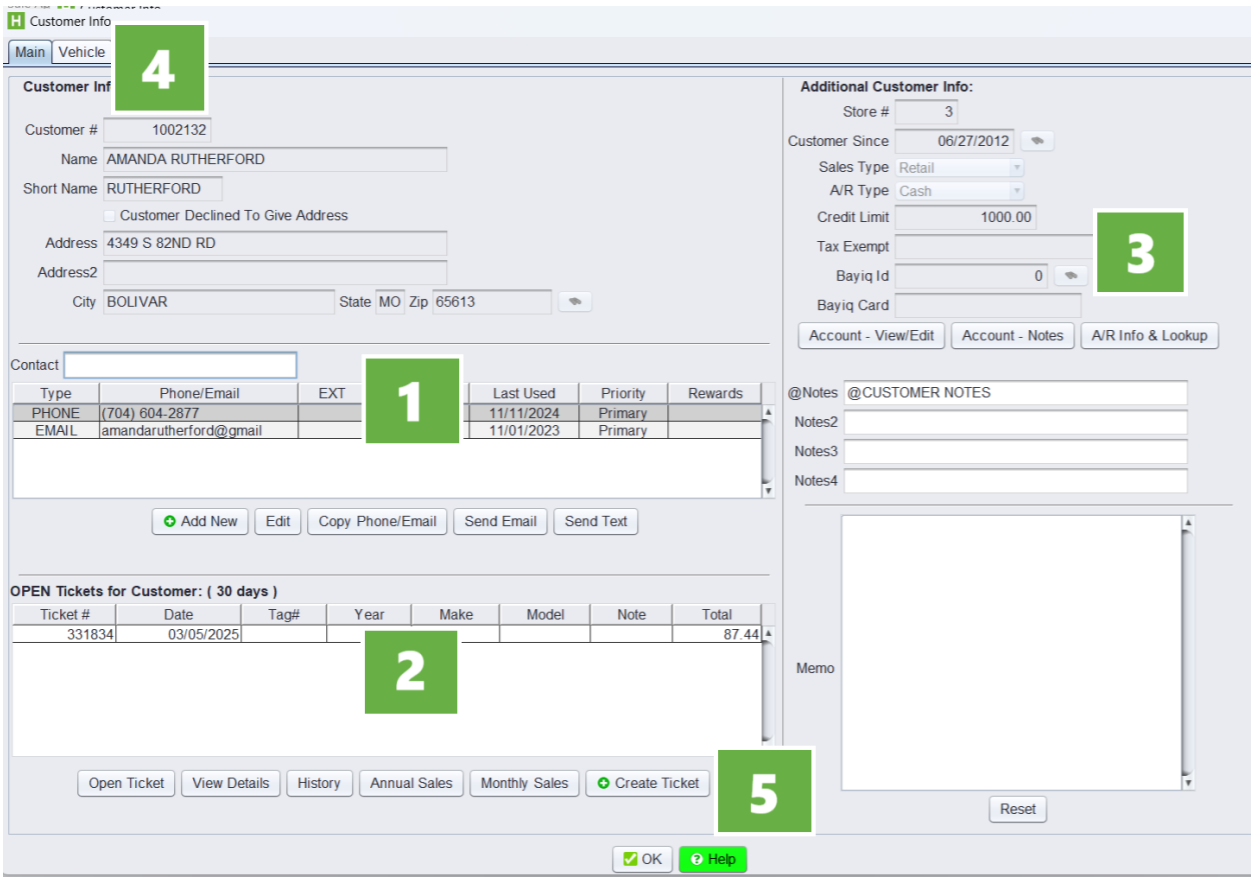
After finding a return customer or adding a new customer, the **Customer Dashboard** will load. The Customer Dashboard will show

1] Contact information

2] Any open tickets for the customer (including appointments)

3] Account information including rewards registration status

4] Tab of customer's vehicles



>>> If the customer is **NEW** (first time visit) and you don't have vehicle information yet, click on the **[5] Create Ticket** button to start the ticket.

(You can add vehicle information after the vehicle's license plate is captured).

>>> If the customer is a returning customer, go to the **[4] Vehicles** tab to locate the vehicle the customer is bringing in.

From here you can click on a vehicle already in the system or click to **Add Vehicle**.

. . . . . .

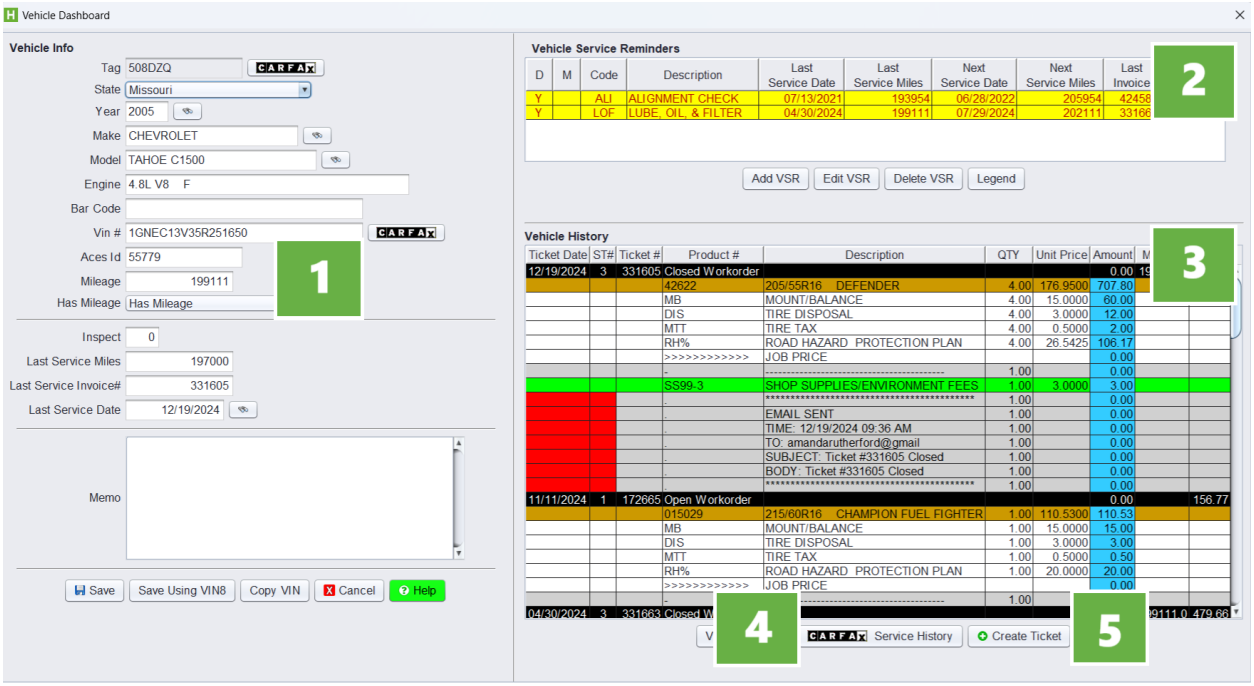
Clicking on a vehicle will pull up the **Vehicle Dashboard** which will show:

1] Vehicle information

2] Any vehicle service reminders

3] Vehicle History

4] Button to search CARFAX Service History

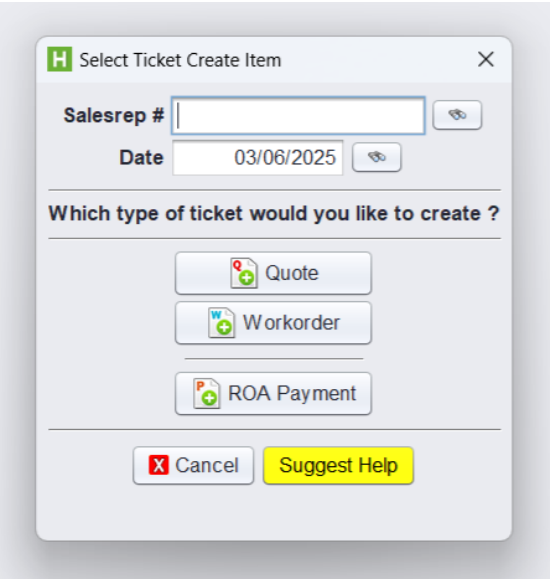


If you are reviewing vehicle information for a returning vehicle, when you are done, click **[5] Create Ticket** to start a new ticket for this vehicle.

. . . . . .

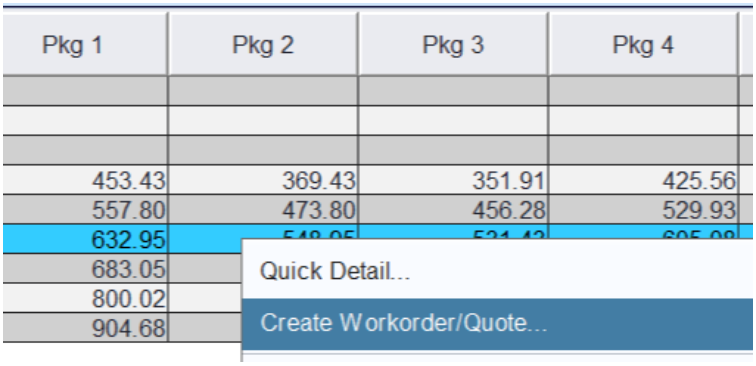
There are multiple ways to start a new Quote or Workorder in HITS.

Many workflows will pass through the **Create Ticket** screen, in which you will need to add your Salesrep code and select whether you are creating a New Quote or New Workorder.

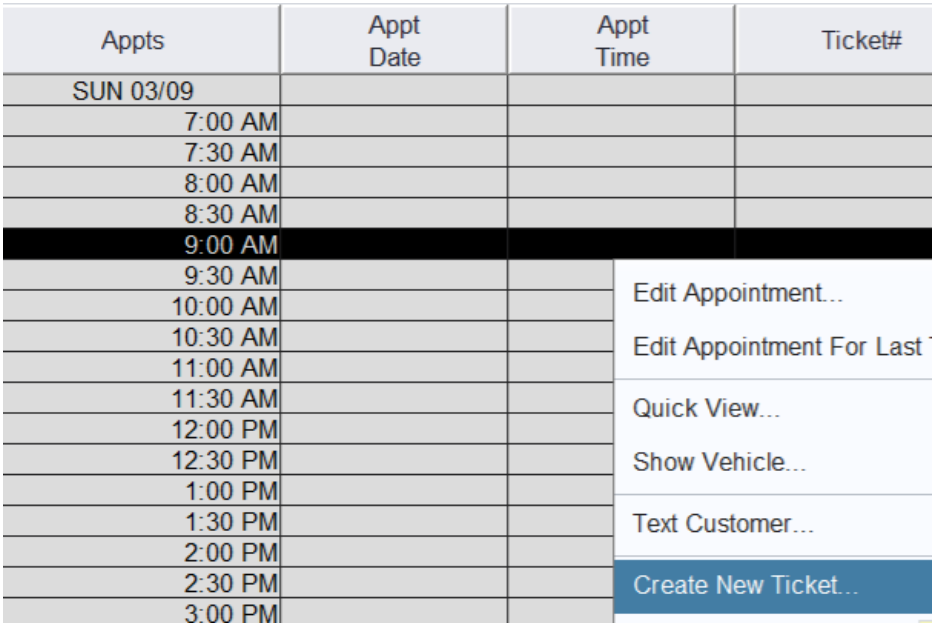


Other places where you may find the option to create a new ticket:

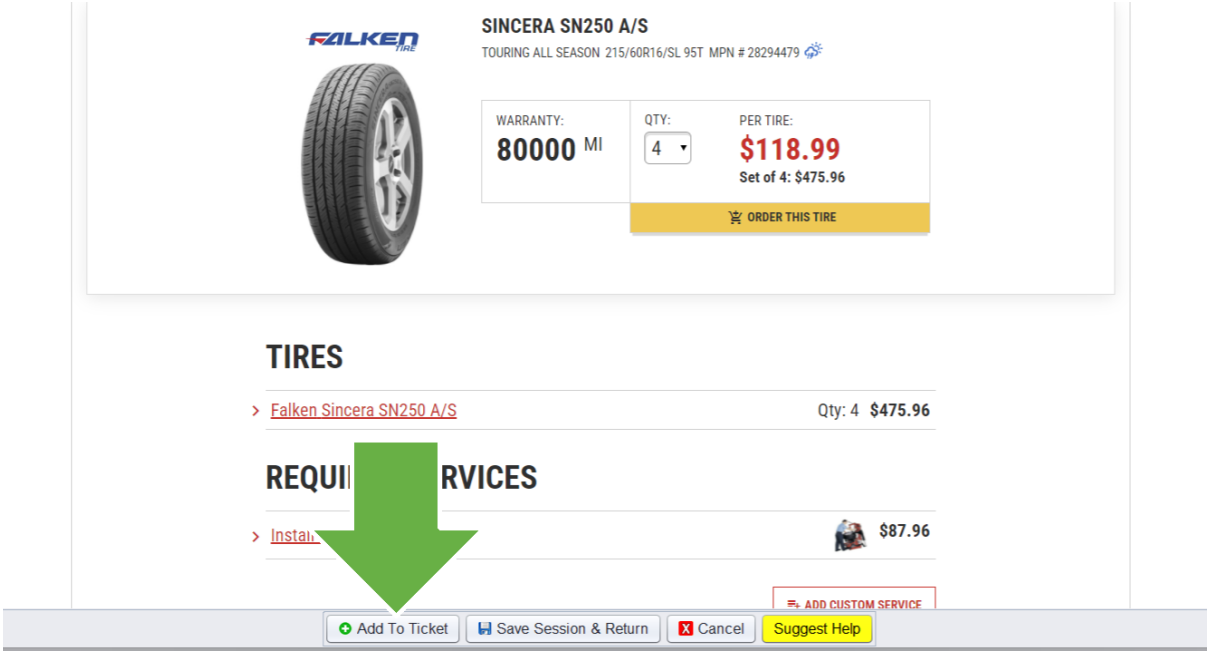
Inventory > Drive Out Pricing > *right-click* > Create Workorder/ Quote



Appointment/ Bay Management > *right-click* > Create New Ticket

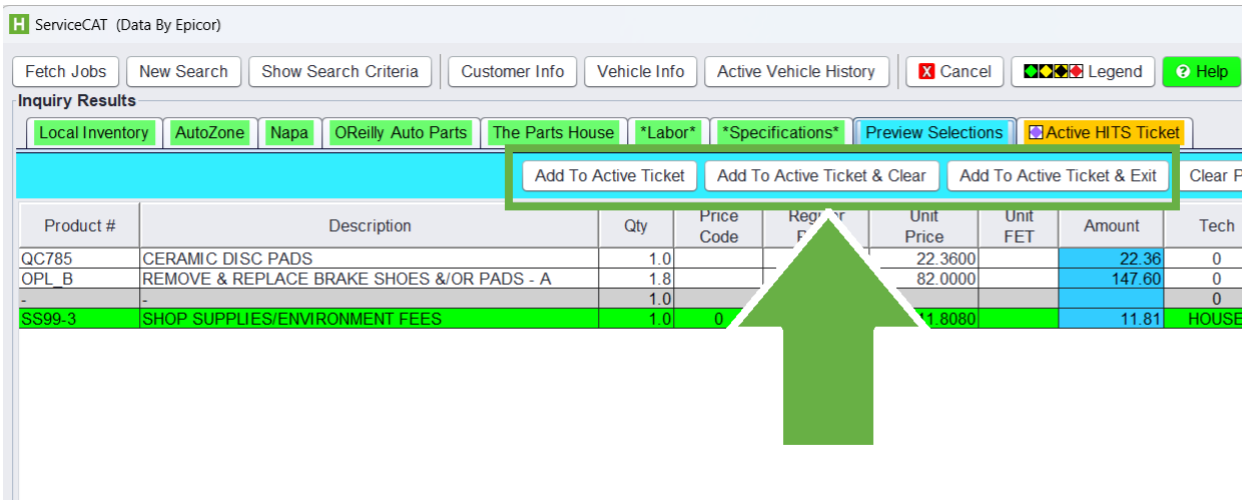


TireCAT (TireConnect) > Add To Ticket



Disclaimer: "Add to Ticket" Button - Tire Cat is currently used for **only** product screen items, to ensure that stores are selling the instructed product screen tires. If you have any questions on what is considered a product screen item, please contact your direct management. If "non-product screen" items are being sold, please follow the process instructed in the store manual, section labeled "Products & Services".

ServiceCAT or LubeCAT > Preview > Add To Ticket



New tickets can be started from all of these screens.

The most important consideration is to ensure the correct customer and vehicle are added to the ticket regardless of where the ticket is initiated.

Converting a Workorder Back Into a Quote

HITS does not support converting a Workorder back into a Quote.

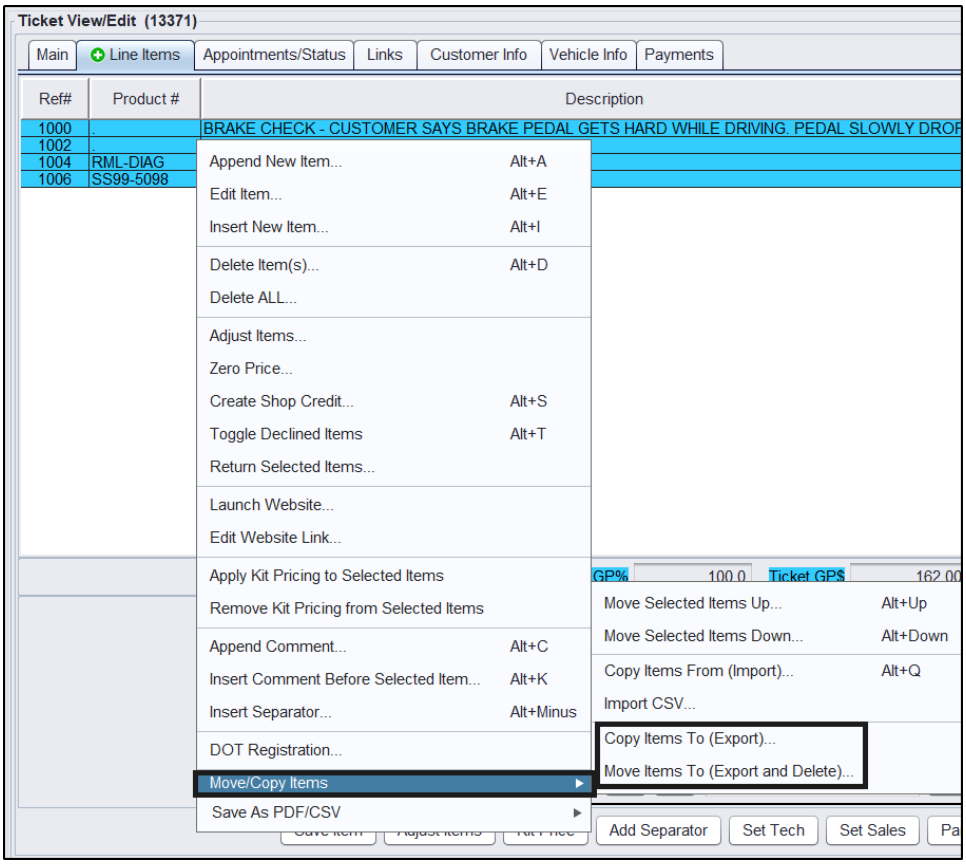
Currently, if you need to change a workorder back into a quote, you would need to take the steps below to move the line-items from the open workorder to a **new Quote** in HITS:

1. Access and open the "Workorder" ticket that needs to be moved to a Quote

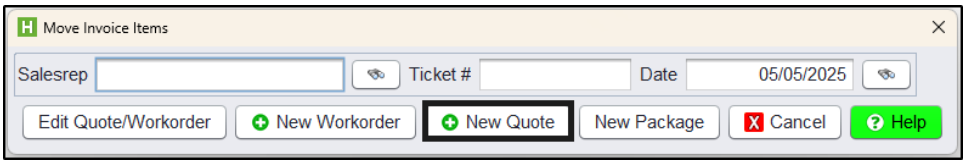
2. Click the **Line Items** tab

3. Click on one line item and hold the left mouse button down and drag your mouse to select/highlight all items on the workorder

4. Once all items are highlighted > Right-Click > Move/Copy Items > select **Copy Items To (Export)...** OR **Move Items To (Export and Delete)...**

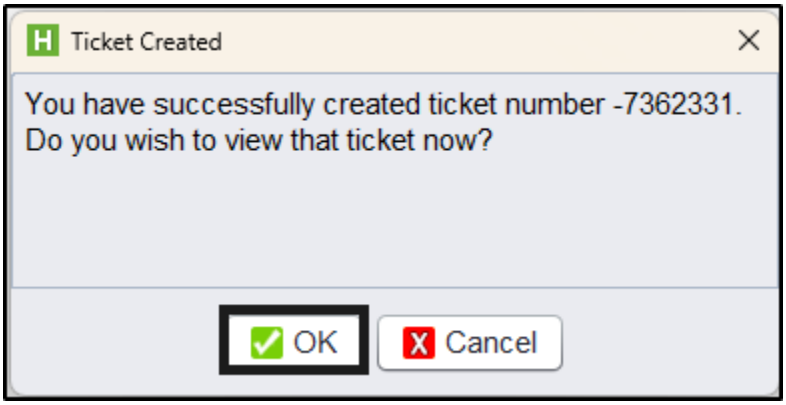


5. Click the **New Quote** button



Note: Do not enter a "Ticket #" as the system will generate the next available Quote Ticket #

6. Click **OK** to view the new Quote



You have now successfully moved items from a Workorder back to a Quote!

Work Order Management Best Practices

Closing out Work Orders when the Job is a No-Show

Everything starts as a quote – there are a couple of scenarios that occur after a quote becomes a workorder. This will address the process for managing work orders in different situations.

Scenario 1: Customer confirms the work, an appointment is scheduled.

Receive a down payment on the job, order parts, attach them to the workorder, and post the receipt as parts are received in the customer workorder.

The customer is a no-show.

All non-stock (OPP) parts declined off the work order and returned to the vendor, decline all labor and inventory items off the work order, make a note of the no-show in the customer record, and close the work order.

Scenario 2: Appointment is scheduled but parts have not been ordered.

If the customer is a no-show and attempts to reach out are unsuccessful, on the day of the scheduled appointment, all lines (labor, inventory items) must be declined from the work order (down to zero cost), make a note of the no-show in the customer record, and close the work order.

b. Customers

Collecting good customer data is critical to the success of all team members.

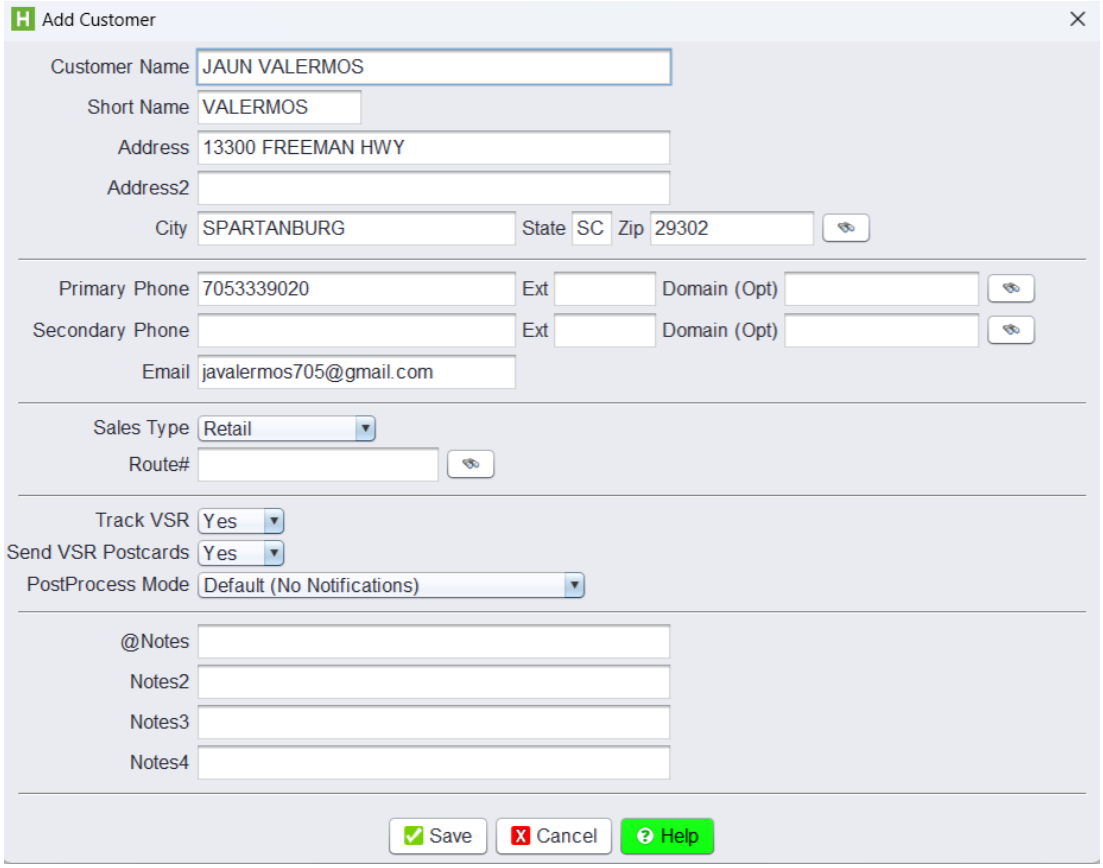
This information will be required for capturing in HITS.

- **Customer Name**
- **Phone # (s)** - used for contact customer about their vehicle
- **Address** – used for some part warranty registrations (ie. tires)

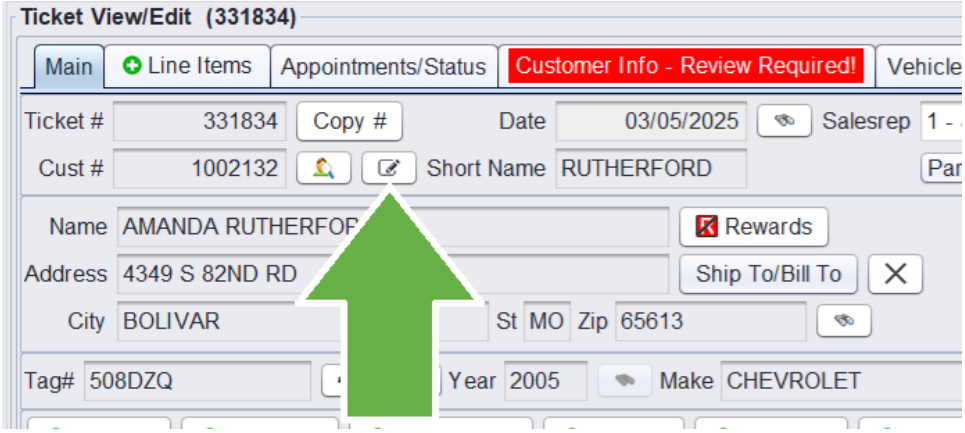
This information will be required for registering the customer for the Rewards:

- **Email Address** – customer may also want email updates sent

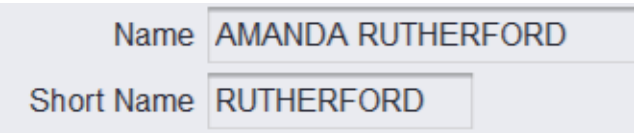
This information can be added into HITS when adding a customer for the first time into the system:



This information can also be added/updated after entering the customer and starting a ticket for the customer, by clicking the **Customer Dashboard (Edit)** icon on the ticket.

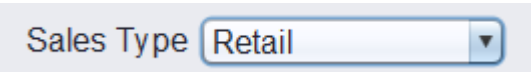


When adding a customer into HITS, the **Short Name** or "search" name will be automatically populated as the LAST NAME of the customer.



For adding businesses, this should be edited to be a representative search name for the business.

Customers should be added as **Sales Type** = "Retail" unless it is a "Commercial" account. The "Wholesale" Sales Type should only be used by Protech Wholesale locations.



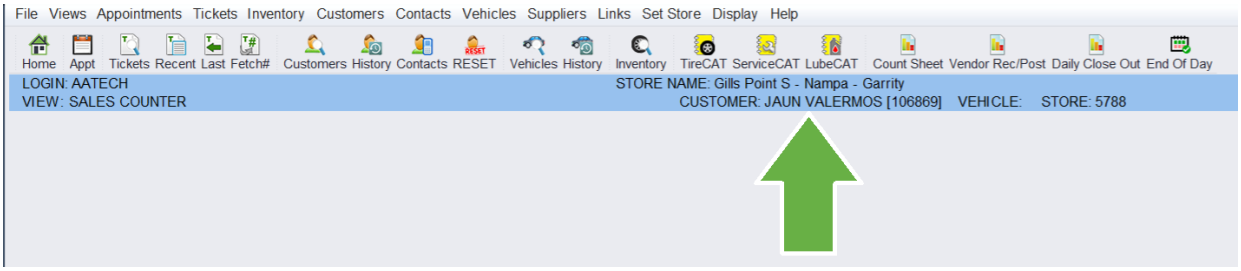
Cash Account

Each store has a default CASH ACCOUNT which is the default customer if no customer is selected.

Invoices cannot be closed to the CASH ACCOUNT. The Workorder will need to contain an actual valid customer.

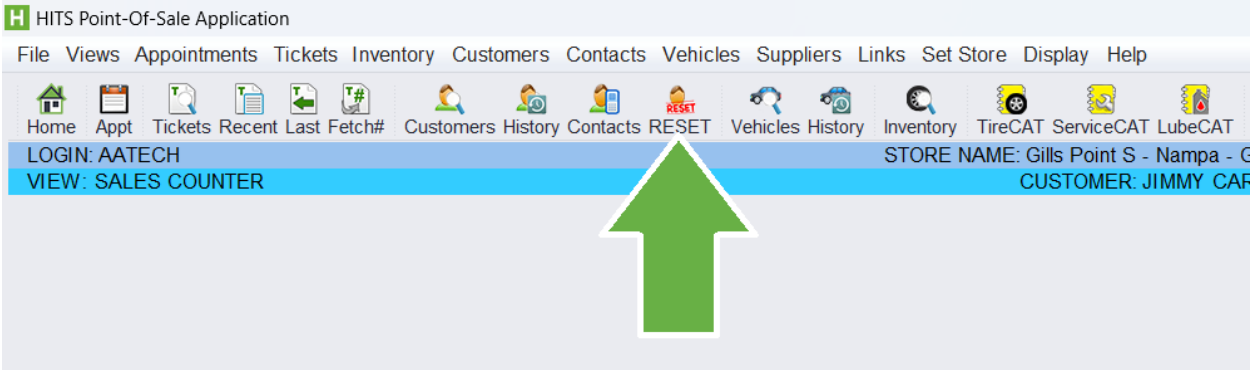
“Active Customer”

You will notice after you have added or edited a customer, this customer will show as the “Active Customer” on the top information bar. Once a customer is active, tickets created will default to this customer.



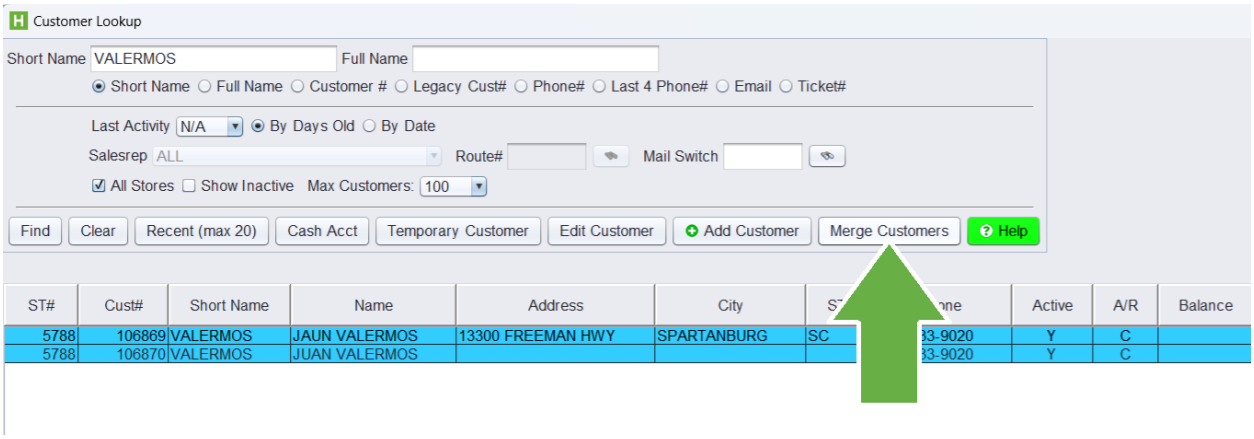
Reset

You can always reset back to the CASH ACCOUNT by clicking the RESET button on the toolbar.

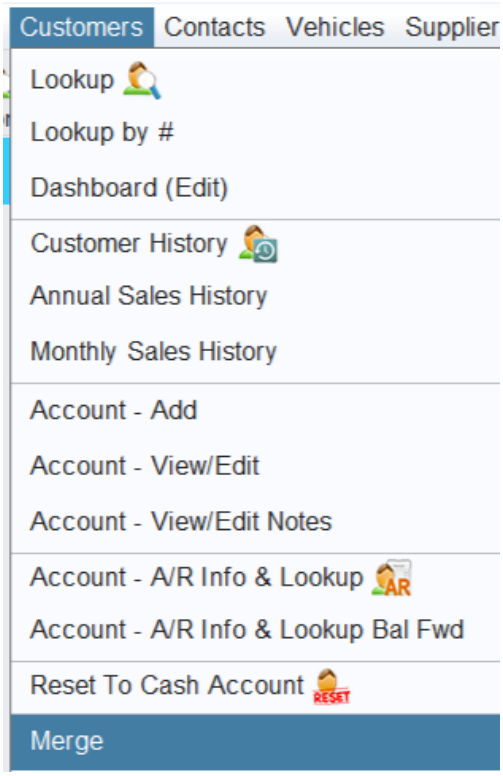


Merging Customers

You may find duplicate customer records in your system. To fix these, you can highlight multiple customers from the Customer Lookup screen and click the **Merge Customers** button ...



... or from the **Customers** menu, select the **Merge Customers** menu option.



This will combine vehicles and history for the merged customers under the selected customer account.

You will not be able to merge customers who have an A/R account and/ or balance in file. Contact your Corporate Accounting Team if you noticed duplicate customer records for A/R accounts.

c. Loyalty Program (BayIQ)

Gills Point S uses BayIQ for its Rewards and Loyalty program.

If a customer wants to receive any offer or discount, they must become a rewards member to access an offer or discount code (including Military, AAA etc.) at the time of checkout in HITS.

If a customer wants to opt out of rewards program communication, they always can from Gills Rewards follow-up emails or SMS texts (depending on opt –in selection).

Customer Reward Types:

Customers can sign up as either a Retail Customer or a Military Customer reward member. Military Customers accrue points at a higher rate than Retail Customers, and this is considered our Military discount.

There should be NO fleet accounts signed up for Gills Rewards via Bay IQ.

Affiliate Programs:

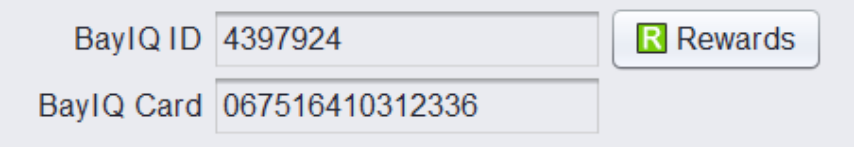
Affiliate programs can be set up in Bay IQ for specific types of businesses or offers.

An example is Lyft Drivers. You can enroll a driver in the Gills Lyft Rewards program by signing them up for the Rewards program, then select the “Enroll Customer in Lyft Affiliate” line item in the Rewards Program Codes and apply it to their work order in HITS. This unlocks the additional Lyft Driver rewards for future visits.

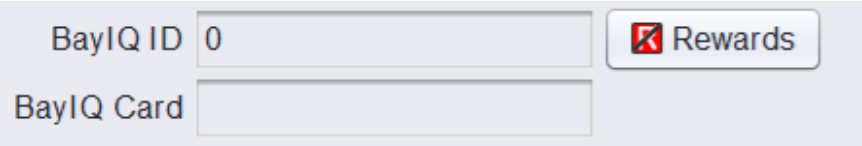
On the **Customer Dashboard** and on the **Workorder**, you will see if the customer has been registered for Rewards.

If the customer is registered, you will see the rewards button highlighted in GREEN.

You can click on the Rewards button to see eligible points and promotions for the customer.



If the customer is **not** registered, the rewards button will be highlighted in RED. Click on the Rewards button to register the customer for Rewards, following the system prompts. IMPORTANT: When registering a new rewards member, collect the following information: name, email address, mailing address, and phone number.



Applying Rewards points and promotions will be detailed in the **Discounts, Loyalty** section of the guide (see Table of Contents for page #).

d. Vehicles

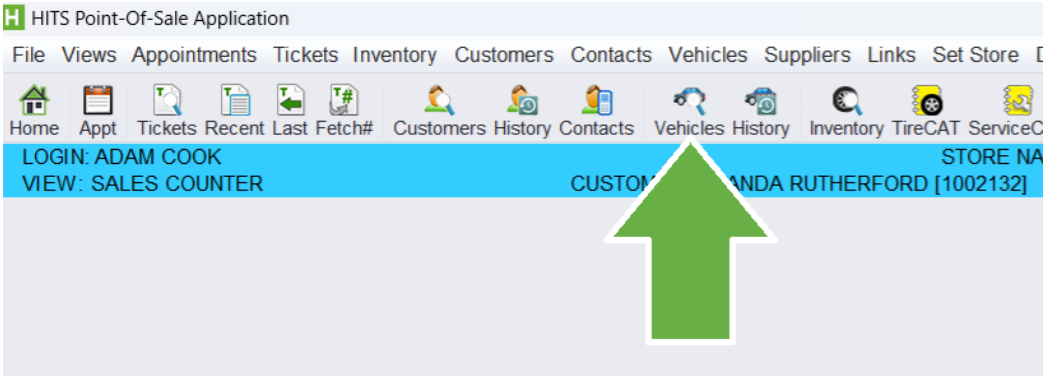
In HITS, vehicles are assigned to a customer. Vehicles cannot be added into the system or invoiced without being assigned to a customer.

Saving a vehicle into HITS requires a unique license plate state + TAG.

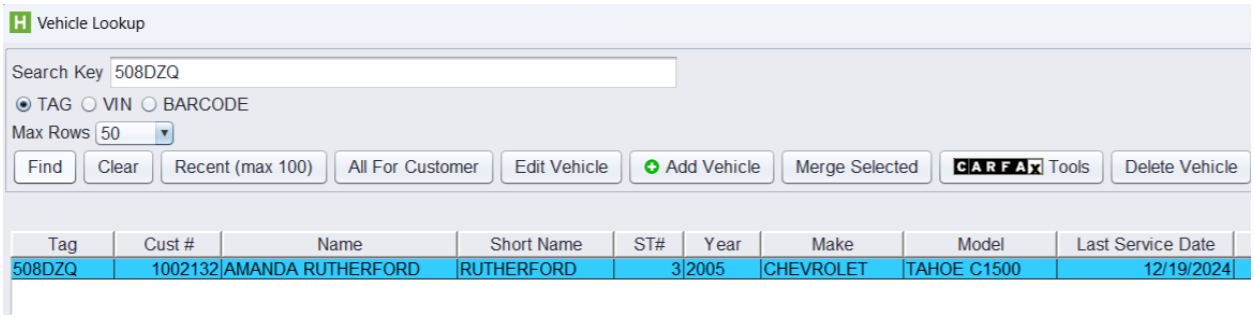
If a vehicle does not have a license plate (such as cars being sent from a dealership), it is recommended to save using the last 8 digits of the VIN.

Important! Since vehicles are assigned to a customer, if you have the vehicle license plate (TAG), this is the fastest way to find a customer's record and their vehicle.

To find a vehicle (and the associated customer) click the **Vehicle Lookup** icon on the toolbar.

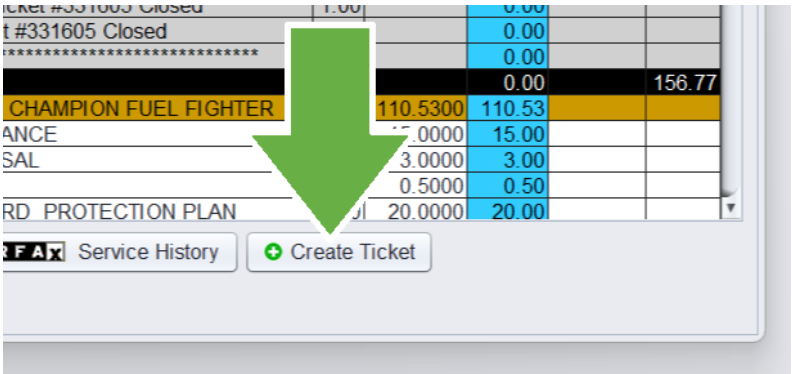


Enter the **TAG** (or VIN or Barcode) and hit **ENTER** (click FIND).



Selecting the correct vehicle will open the **Vehicle Dashboard** as well as retrieve the correct customer account.

From here you can proceed to **Create Ticket** for this customer and vehicle.

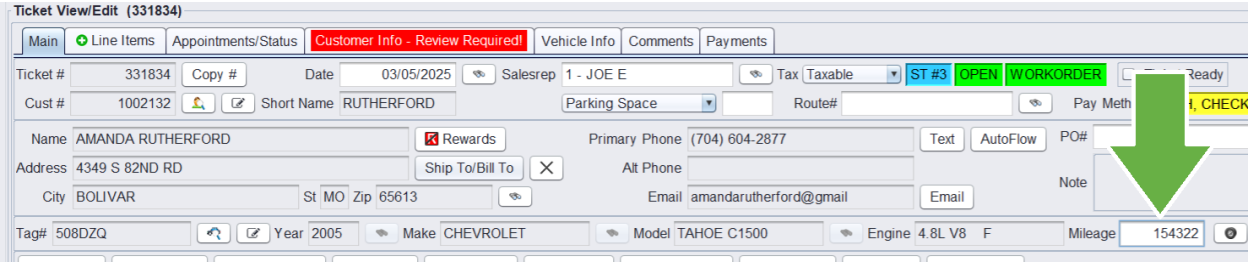


Mileage

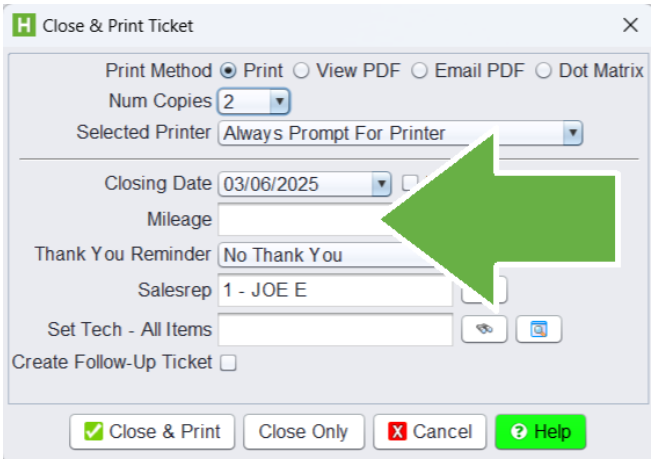
It will be required to enter the mileage on the Workorder prior to closing.

The mileage can be entered on the Main tab of the ticket.

After entering Mileage, click **Save**.



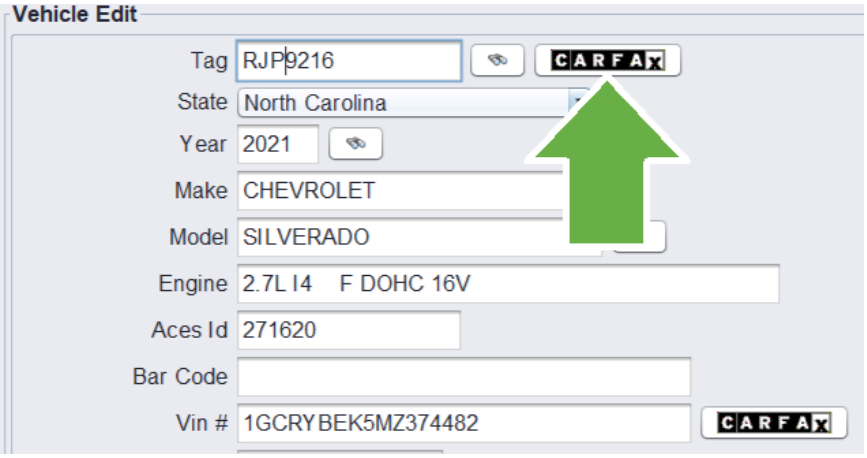
If it has not been entered prior to closing the Workorder, You will be prompted before your are able to print and close the invoice.



Carfax

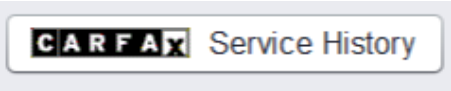
HITS is integrated with CARFAX.

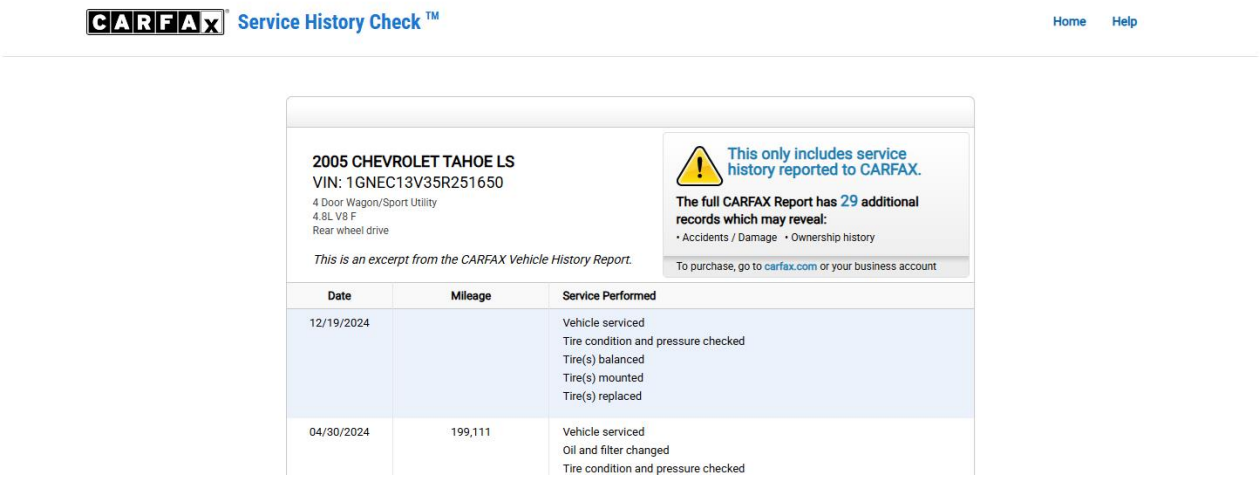
When adding new vehicles, simply enter the TAG and STATE and click the **CARFAX** button. If found, CARFAX will return year, make, model, and engine size.



Gills Point S reports invoice history to CARFAX so your shop's history will show on CARFAX reports.

Additionally, you can click the **CARFAX Service History** button in HITS to see history performed at other shops (outside Gills). This will only include the history of shops that are reporting their data to CARFAX.

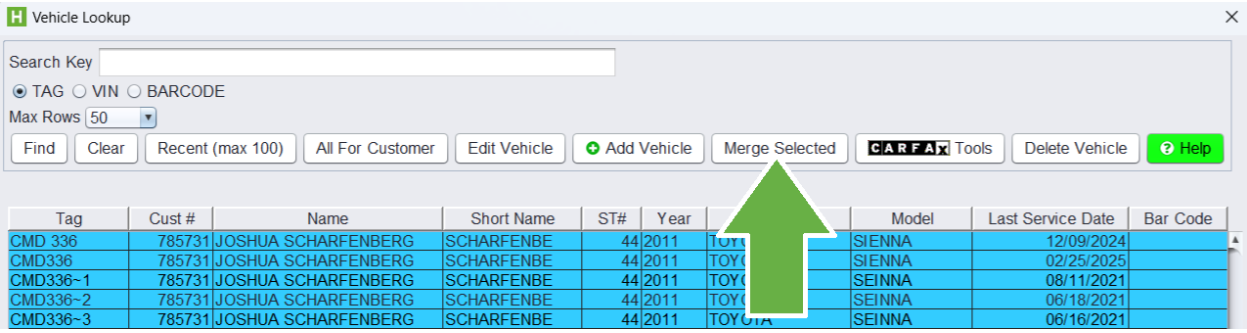




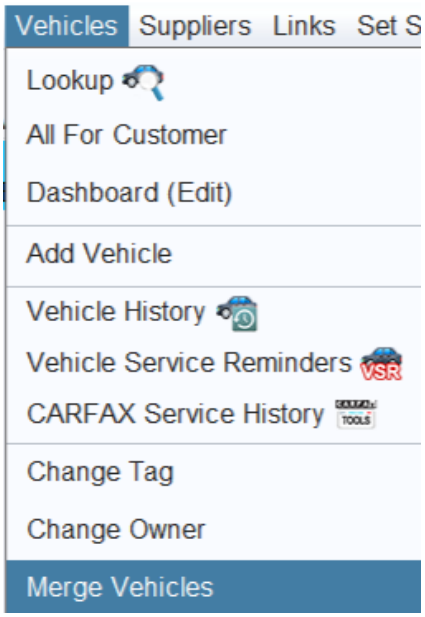
Merge Vehicles

Like customer records, duplicate vehicle records can be merged, if found.

To fix these, you can highlight multiple vehicles from the Vehicle Lookup screen and click the **Merge Vehicles** button ...



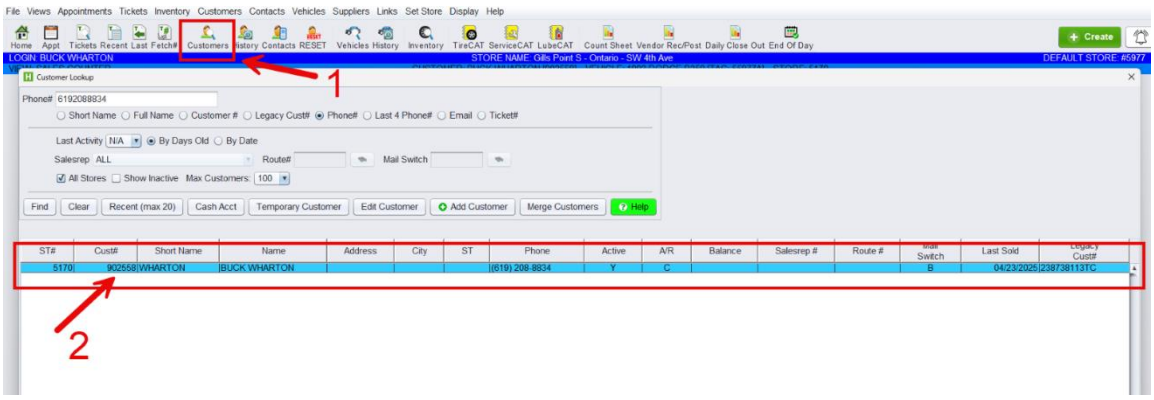
... or from the **Vehicle** menu, select the **Merge Vehicles** menu option.



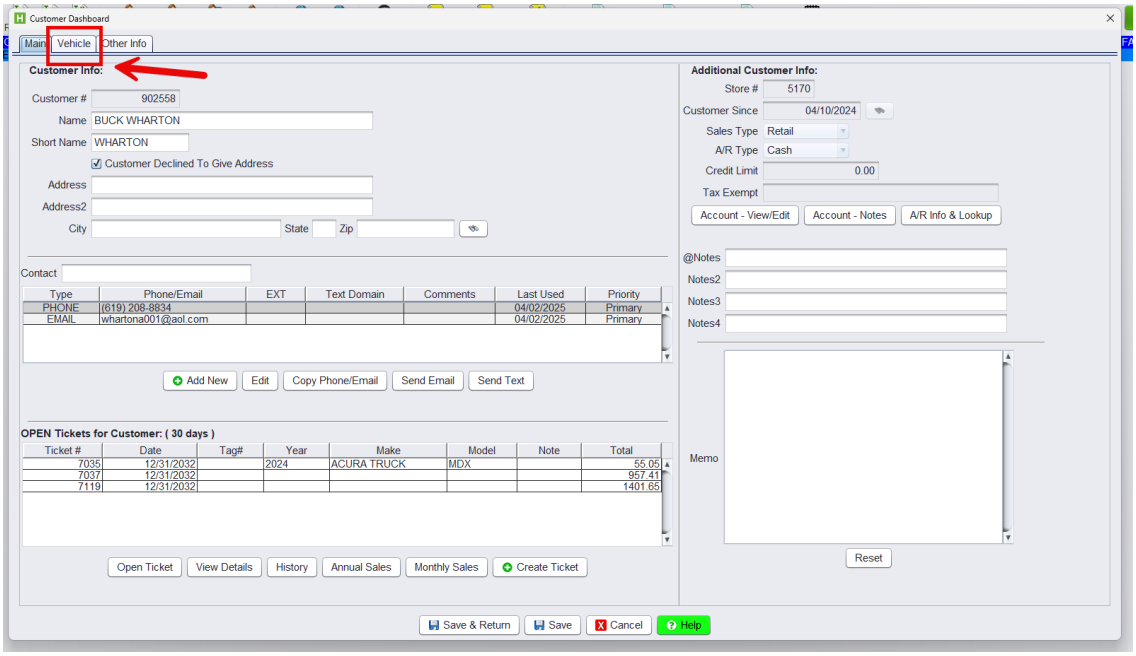
This will combine vehicles and history under the selected vehicle.

Moving Vehicle Tags Without Merging Customers

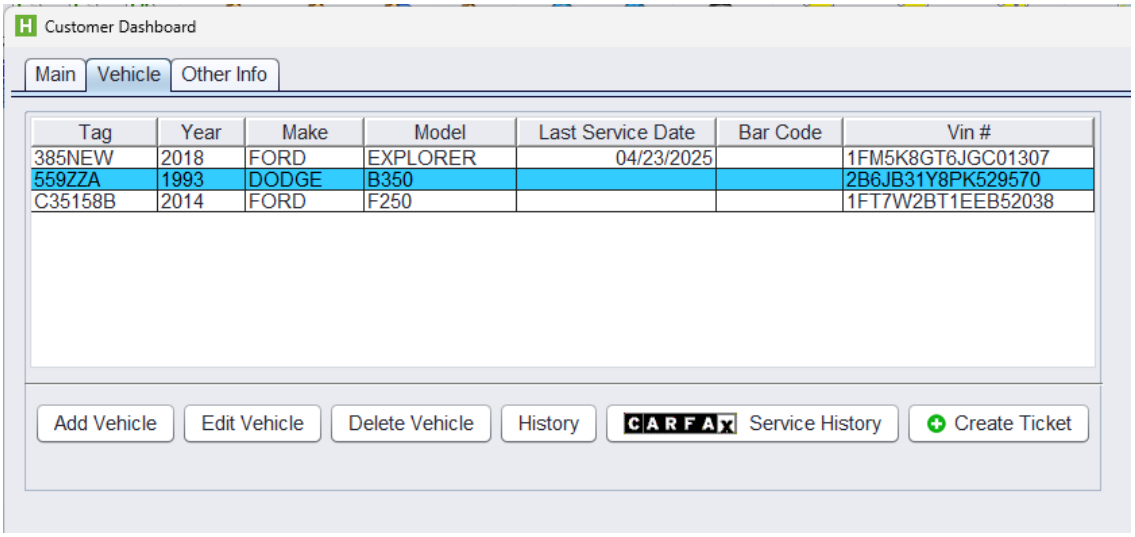
This process ensures that vehicle tags are moved without merging customers:



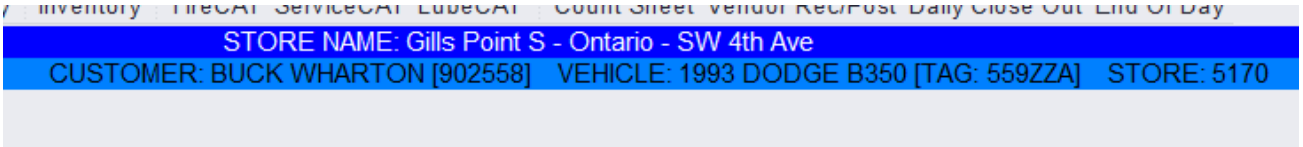
1. **Choose the Customer**:
    - Select the customer who has been mis-assigned the vehicle tag.
2. **Access the Customer Dashboard**:
    - Open the customer profile in the system. Select the Vehicle tag.



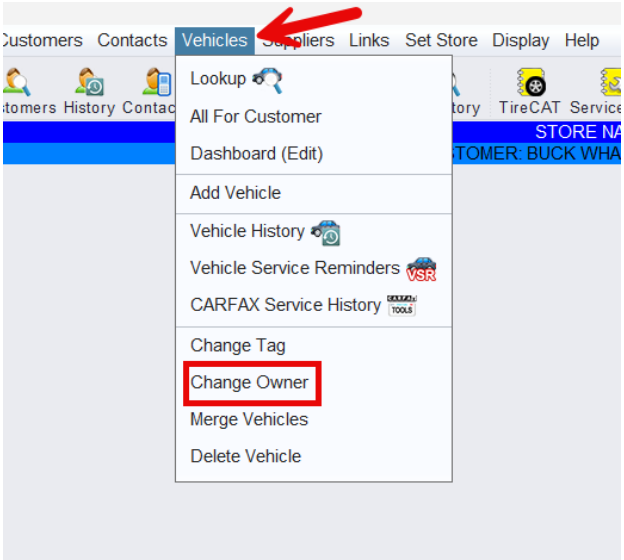
- Double-click on the Vehicle that needs to be reassigned.



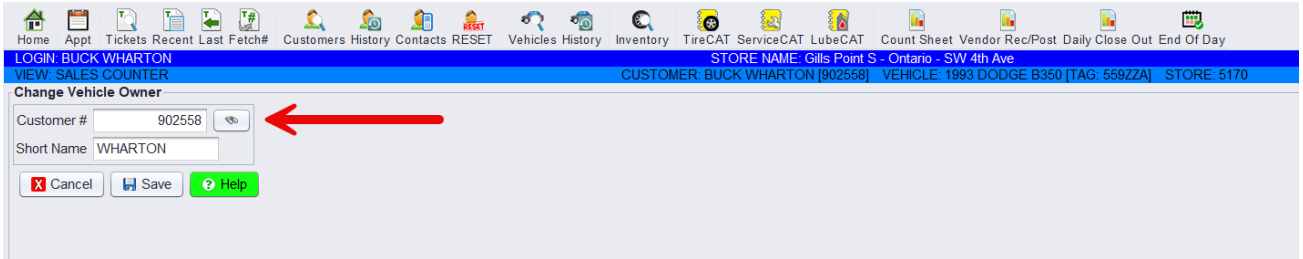
- Make sure that the vehicle is now in the customer information bar.



3. **Reassign the Vehicle**:
   - Reassign the vehicle to the correct customer by updating the vehicle information in the system.

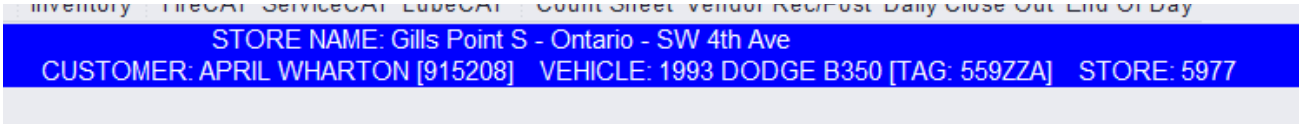


- Select vehicles in the top bar, then select Change Owner.



- Insert the correct Customer number or search for the customer.
- Once the correct Customer is displayed, select save.

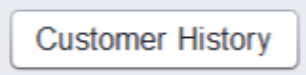
4. **Confirm the Changes**:
   - Ensure that the vehicle tag is now correctly assigned to the appropriate customer.



e. History

History can be seen from the **Customer Dashboard**, **Vehicle Dashboard**, and on the **Customer History** and **Vehicle History** buttons located on various screens throughout the application.

Customer History will show the history for all the customer's vehicles.



Vehicle History will show the history of the current, active vehicle.

Quotes, Workorders, Batch, and Invoices will all show in History. Double click on any **black row** in history to **open** that ticket.

Quick Vehicle Report For Tag [385JNH] From 03/09/2021

Ticket Date	ST#	Ticket #	Product #	Description	QTY	Unit Price	Amount
03/06/2025	3	331835	Open Workorder				0.00
			TR	TIRE REPAIR	1.00		0.00
			OPP	FRONT CERAMIC PADS	1.00	70.8900	70.89
			OPL_B	REMOVE & REPLACE BRAKE SHOES &/OR PADS - F	1.00	82.0000	82.00
			-	-	1.00		0.00
08/28/2024	3	330877	Closed Workorder				0.00
			PKG-BG10	BG 75W140 DIFSERVICE FRONT	1.00		0.00
			75364	BG BG 75W140	1.00	96.9500	96.95
			ML	MAINTENANCE LABOR	1.00	25.0000	25.00
			>>>>>>>>>>>>>	PACKAGE TOTAL>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>			0.00
			SS99-3	SHOP SUPPLIES/ENVIRONMENT FEES	1.00	9.7600	9.76

Declines will show highlighted in light red inside of history. You copy and paste these items onto the ticket if accessing history from within a ticket.

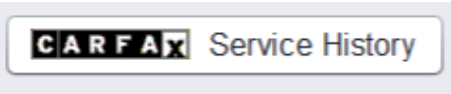
OPP	FRONT CERAMIC PADS	1.00	70.8900	70.89		D
OPL_B	REMOVE & REPLACE BRAKE SHOES &/OR PADS - F	1.00	82.0000	82.00		D

"**Legacy History**" is history from a previous point-of-sale such as Traction or GTX. Legacy history can be viewed alongside other history, but as "read only". Legacy Tickets cannot be reprinted as an invoice.

Vehicle History

Ticket Date	ST#	Ticket #	Product #	Description	QTY	Unit Price	Amount	Mileage	Total
04/11/2024	422	2087446	Closed Workorder	*** LEGACY TICKET - (DISPLAY ONLY) ***			0.00		240.09
04/11/2024	422	2087446		OTHERFEE	1.00	4.5000	4.50		240.09
04/11/2024	422	2087446		SALES TAX	1.00	12.0000	12.00		240.09
04/11/2024	422	2087446		FET	1.00	8.5900	8.59		240.09
04/11/2024	422	2087446	TH94682	WESTLAKE CR960A - ALL STEEL RADIA...	1.00	200.0000	200.00		240.09
04/11/2024	422	2087446		PREMIUM INSTALL PACKAGE (LT)		15.0000	15.00		240.09
03/29/2024	422	2083765	Closed Workorder	*** LEGACY TICKET - (DISPLAY ONLY) ***			0.00		245.41
03/29/2024	422	2083765		SALES TAX	1.00	12.4800	12.48		245.41
03/29/2024	422	2083765		OTHERFEE	1.00	4.5000	4.50		245.41
03/29/2024	422	2083765	TH19234	WESTLAKE CR960A ALL STEEL TRAILE...	1.00	200.0000	200.00		245.41
03/29/2024	422	2083765		FET	1.00	5.4800	5.48		245.41
03/29/2024	422	2083765		PREMIUM INSTALL PACKAGE (TR)		15.0000	15.00		245.41
03/29/2024	422	2083765	602HP	VALVE-HI PRESS. RUBBER 2	1.00	7.9500	7.95		245.41
03/29/2024	422	2083765		RR			0.00		245.41
01/15/2024	417	2064360	Closed Workorder	*** LEGACY TICKET - (DISPLAY ONLY) ***			0.00	118301.0	695.67
01/15/2024	417	2064360		OTHERFEE	4.00	7.0000	28.00	118301.0	695.67
01/15/2024	417	2064360		SALES TAX	1.00	32.8700	32.87	118301.0	695.67
01/15/2024	417	2064360	167036001	MASTERCRAFT STRATUS	4.00	136.9500	547.80	118301.0	695.67
01/15/2024	417	2064360		PREMIUM INSTALL PACKAGE (P)		21.7500	87.00	118301.0	695.67
01/15/2024	417	2064360		* REBUILD/RESET TPMS OR NEW STEM...			0.00	118301.0	695.67
01/15/2024	417	2064360		UNT/DISMOUNT & INSTALL * INCLUD...			0.00	118301.0	695.67
01/15/2024	417	2064360		TATION * FREE FLAT REPAIR			0.00	118301.0	695.67

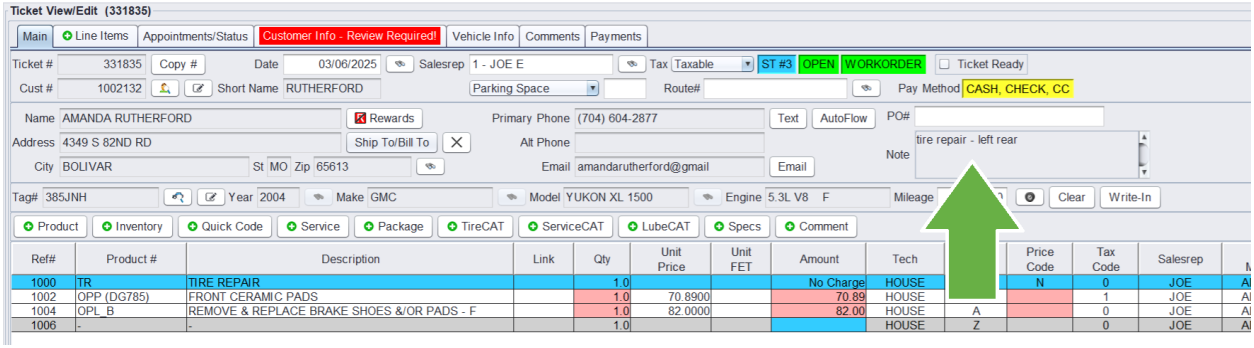
Additionally, you can click the **CARFAX Service History** button in HITS to see history performed at other shops (outside of Gills). This will only include history for shops that are reporting their data to CARFAX.



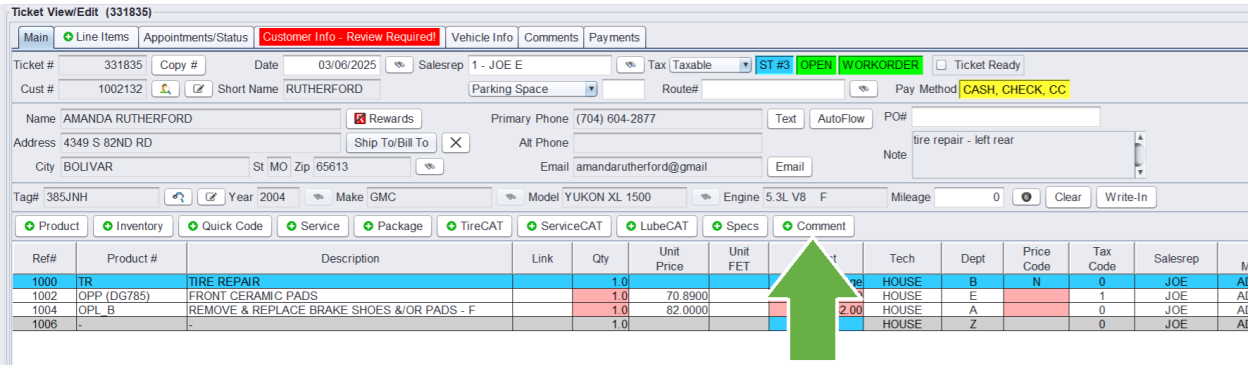
f. Ticket Notes & Comments

When starting a ticket, a **note** can be added to the ticket, noting why the customer is bringing in their vehicle or any other important note.

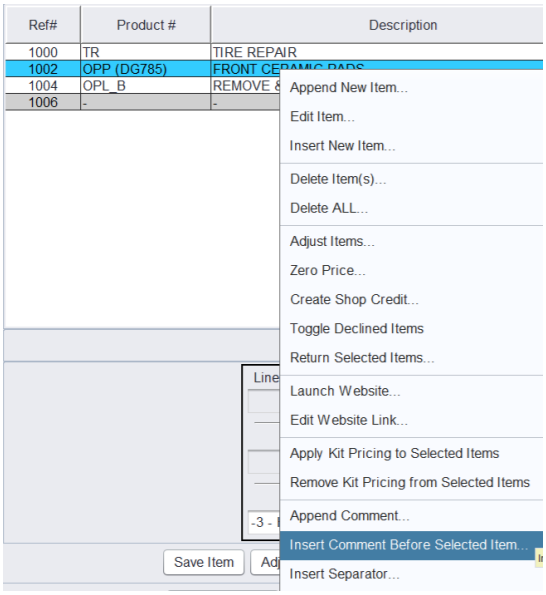
This note will not print on the customer's invoice.



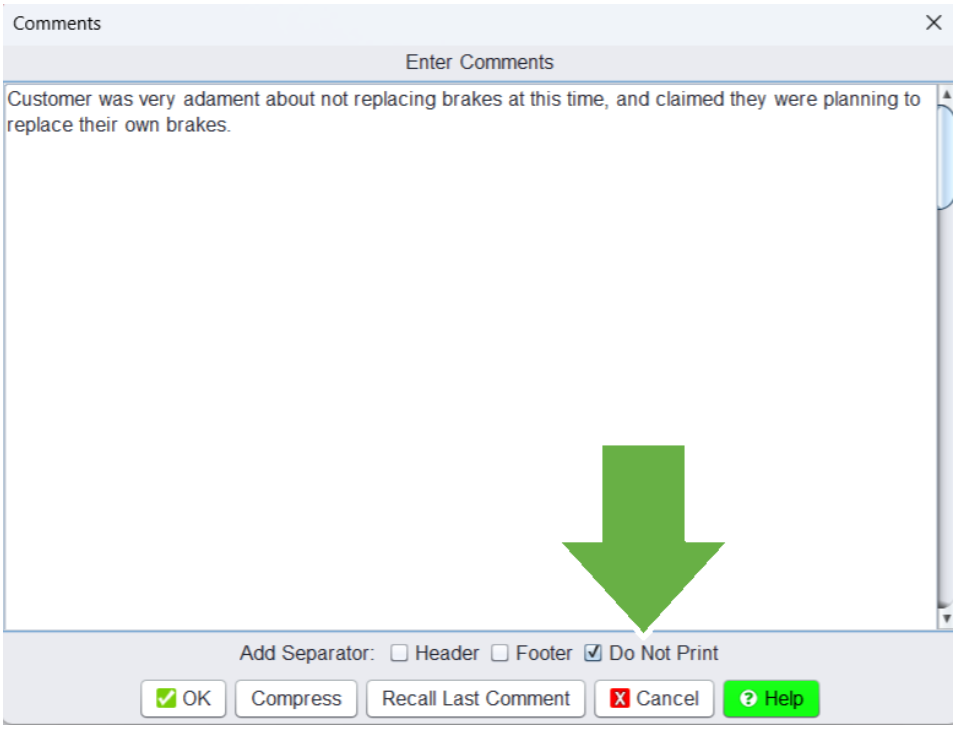
Line item comments can also be added to the ticket. Click the **Add Comment** button to add comments to the bottom of the ticket.



From the **Line Items** tab of the ticket, *right-click* to **Insert Comment** if you need to add a comment in a specific location on the ticket (for example before line items).

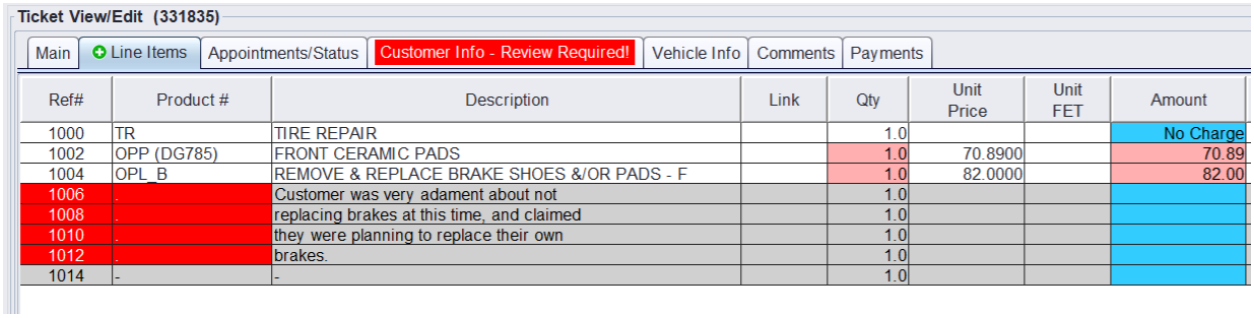


Comments on the ticket can be as **Do Not Print .**



Do Not Print comments will be shown highlighted on the ticket as RED.

These comments will print on the TECHNICIAN SHEET WORKORDER , but not on the customer's final Invoice.

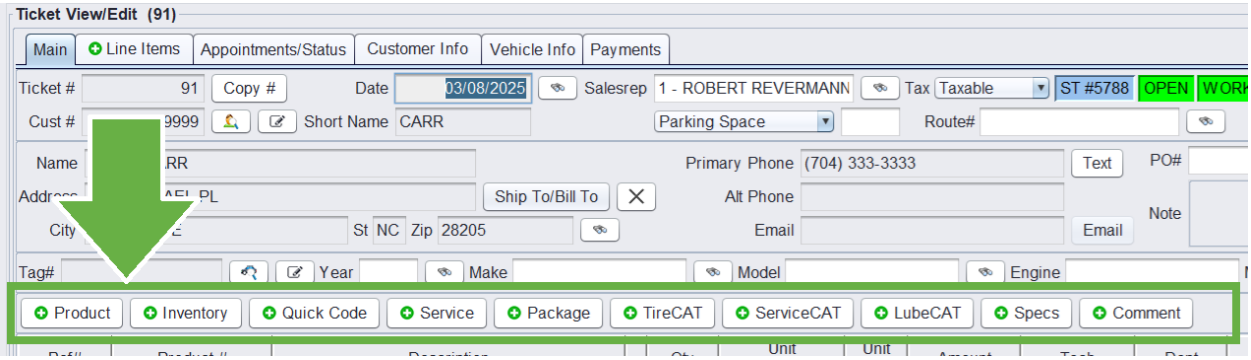


Ref#	Product #	Description	Link	Qty	Unit Price	Unit FET	Amount
1000	TR	TIRE REPAIR		1.0			No Charge
1002	OPP (DG785)	FRONT CERAMIC PADS		1.0	70.8900		70.89
1004	OPL_B	REMOVE & REPLACE BRAKE SHOES &/OR PADS - F		1.0	82.0000		82.00
1006	.	Customer was very adament about not		1.0			
1008	.	replacing brakes at this time, and claimed		1.0			
1010	.	they were planning to replace their own		1.0			
1012	.	brakes.		1.0			
1014	-	-		1.0			

g. Products & Services

The following section will detail how to add products and services onto tickets.

The **+ Add button row** on the Main tab of the ticket will detail the various line-item types that can be added to a ticket:



+ Product – add item by typing in the product code (if known). A product code could be for an inventory item, a nonstock item, or a service. All items that get added to tickets have a product code.

+ **Inventory** – add item by going to the inventory lookup screen and searching for products (most often used for tires, by searching RAWSIZE.)

+ **Quick Code** – add commonly used item codes, including nonstock code like OPT (Outside Purchase Tire), OPP (Outside Part), and MECH (General Labor). In a pinch, mostly any ticket could be written up with Quick Codes only.

+ Service – add a service (labor) code by seeing a list of service items.

+ Package – add a pre-configured package for items sold in a kit such as a preventative maintenance package.

+ ServiceCAT – lookup and quote parts and labor through SerivceCAT (powdered by EPICOR) which will show parts from your parts vendors and Mitchell labor.

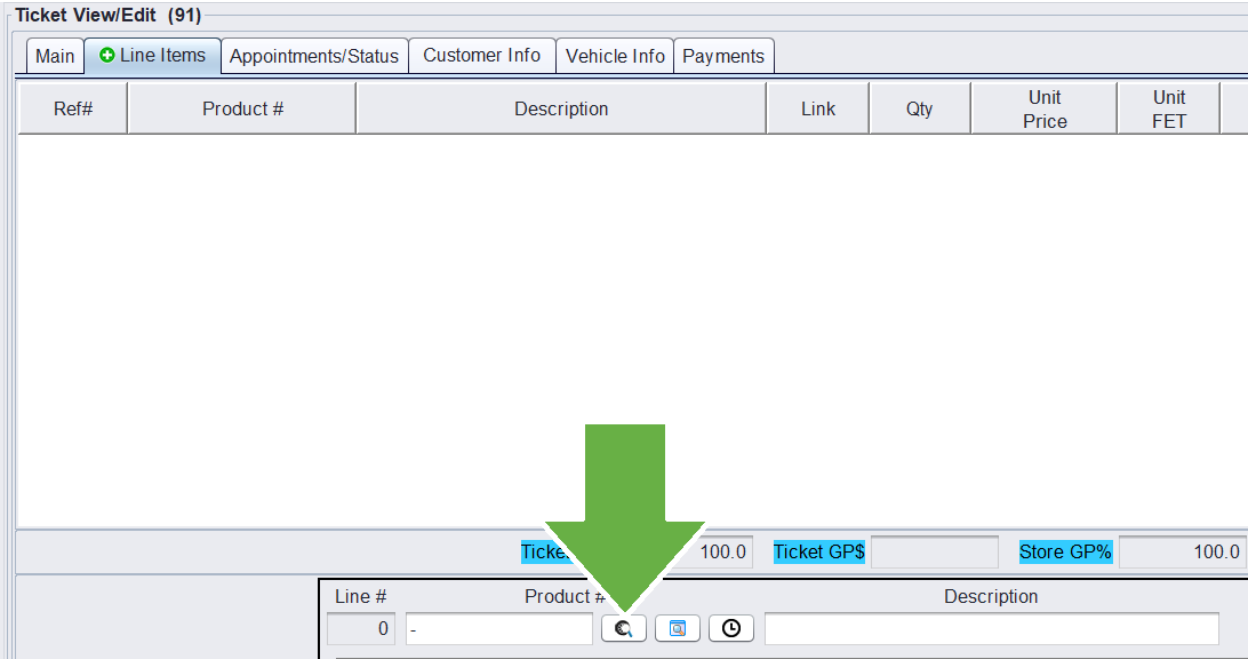
+ LubeCAT - add quick lube packages by going through LubeCAT.

+ Specs – add vehicle specification to the ticket from EPCIOR

+ Comment – add a comment as a line item to the ticket

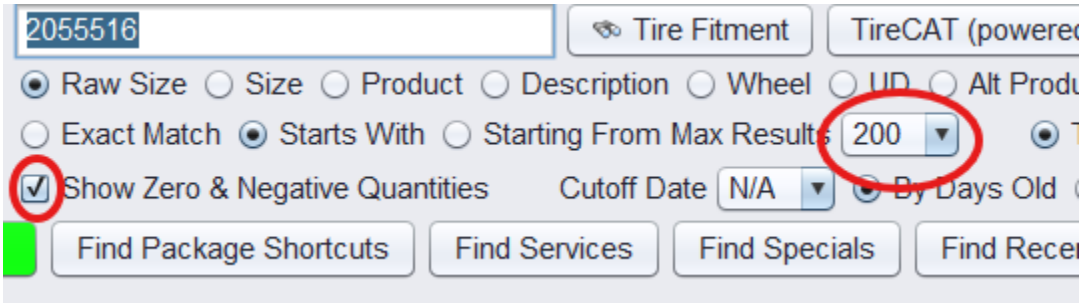
Tire Sales (and TireCAT)

To quote and add tires from inventory to a ticket, click the **+ Inventory** button or from the Line Items tab, click the **tire** icon.



Type in the RAWSIZE of the tire (ie. 2156016) or click **Tire Fitment** button to search by vehicle. Hit ENTER or click FIND.

To get more comprehensive search results, you will find it necessary to change the max results to the highest allowable as this will show more tires. You may also need to check off "show zero and negative quantities".

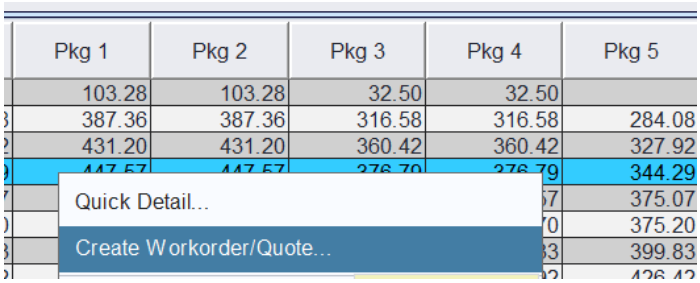


If you have launched the Inventory Lookup screen from within a ticket, you can *double click* a tire to bring it back to the ticket.

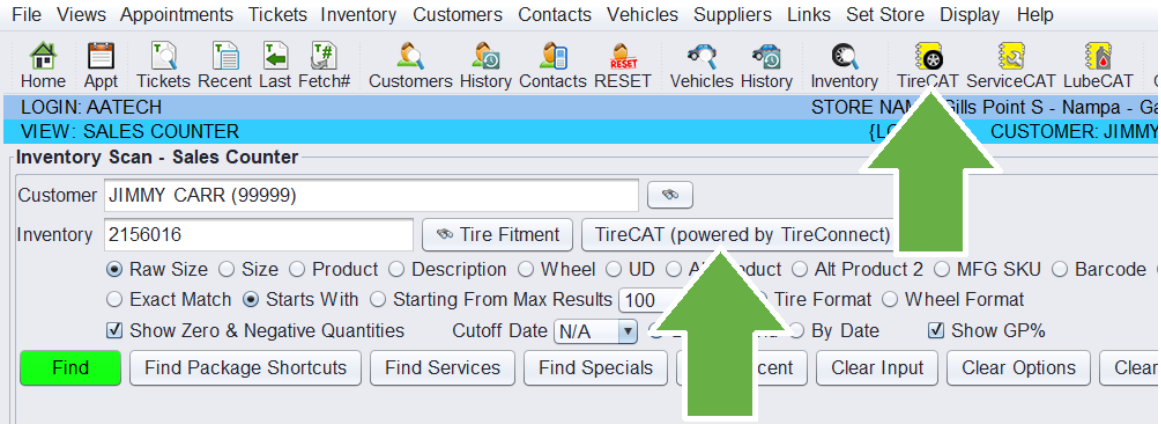
From the **Drive Out Pricing** tab, you can see tire inventory priced in the various installation packages including Promise Plus Warranty packages.

Product #	MFG	Size	Description	Qty	Other	No Pkg	Custom Pkg	Pkg 1	Pkg 2	Pkg 3	Pkg 4	Pkg 5
TS32175	NOK	215/60R16	NOKIAN NORDMAN 7 SUV STUD		1			103.28	103.28	32.50	32.50	
3431250610	FOR	215/60R16	FORTUNE CLIMAFLEX 4S FSR-402			284.08	284.08	387.36	387.36	316.58	316.58	284.08
24655020	MSR	215/60R16	MILESTAR MS932			327.92	327.92	431.20	431.20	360.42	360.42	327.92
5546778V	BLK	215/60R16	BLACKHAWK STREET-H HH11			344.29	344.29	447.57	447.57	376.79	376.79	344.29
24655023	WLK	215/60R16	WESTLAKE RP18			375.07	375.07	[illegible]	[illegible]	407.57	407.57	375.07
3431030703	FOR	215/60R16	FORTUNE PERFECTUS FSR602 A/S			375.20	375.20	PROMISE PLUS WARRANTY PLAN		407.70	407.70	375.20
PT107918	PTA	215/60R16	PANTERA TOURING A/S			399.83	399.83	503.11	503.11	432.33	432.33	399.83
24655036	WLK	215/60R16	WESTLAKE RP18			426.42	426.42	529.70	529.70	458.92	458.92	426.42

Right-click on a tire and a package to add this package to your current ticket or a new ticket with the **Create Workorder/ Quote** option.



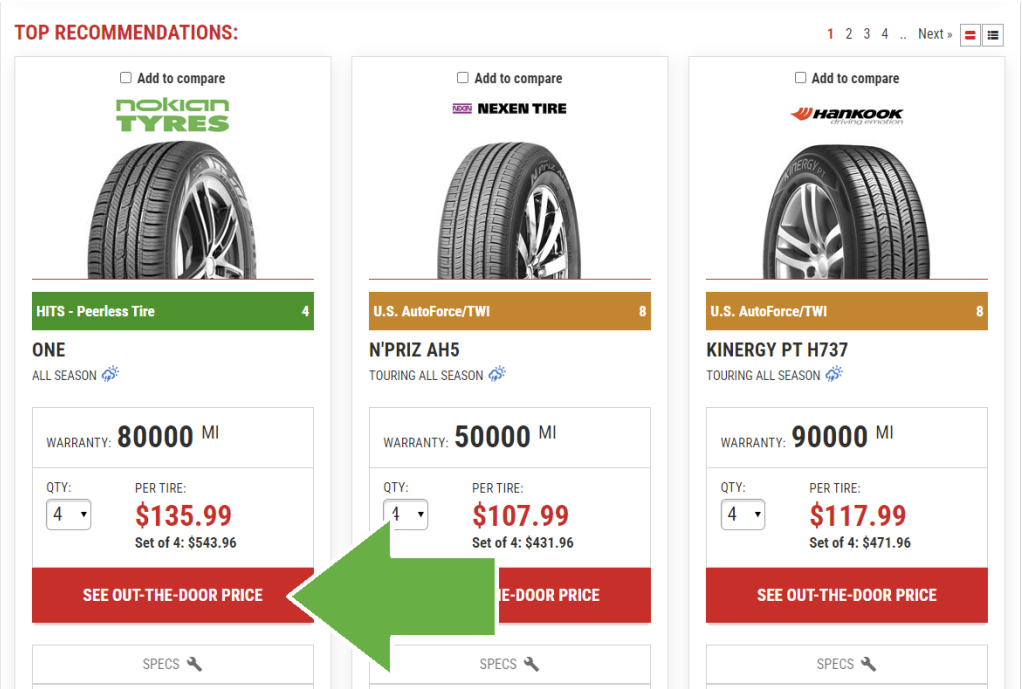
You can also use **TireCAT (**which is the TireConnect integration inside of HITS).



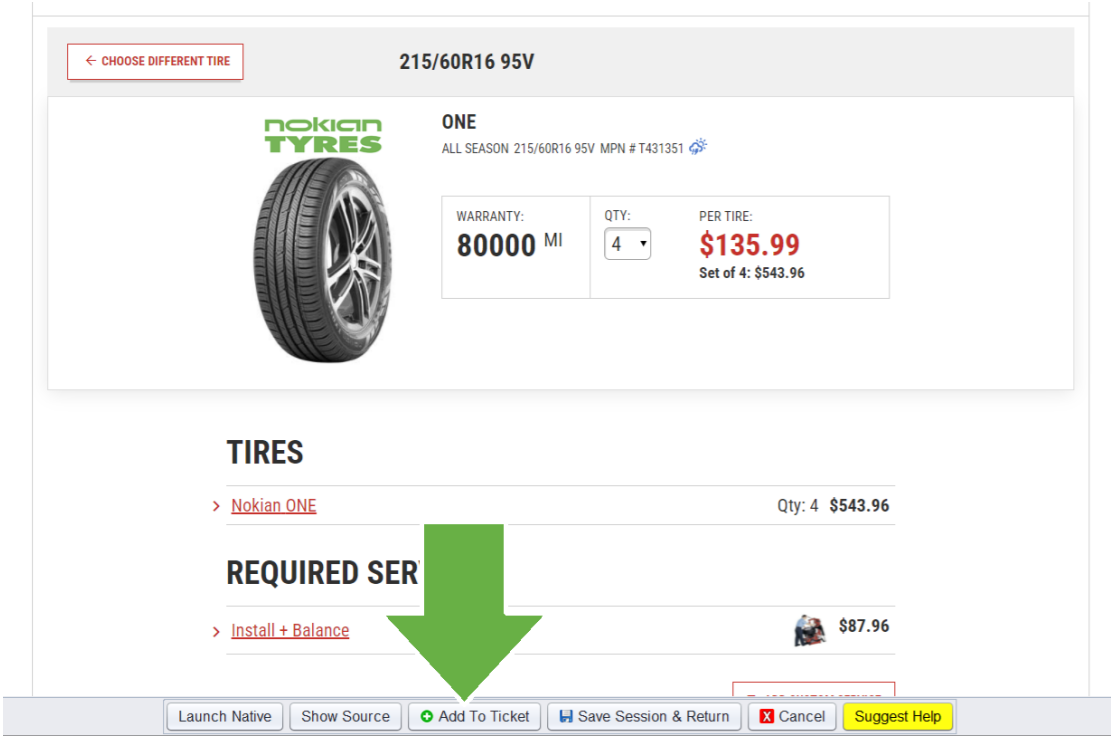
Important ! Using TireCAT (powered by TireConnect) in HITS ensures your customers receive a seamless experience between your website and in-shop.

TireConnect can be used within HITS to create good, better, best quotes and source tires that you don't have in stock from approved suppliers.

To add a tire from TireCAT back to a ticket, first click **SEE-OUT-THE –DOOR-PRICE**



Once the quote has pulled up, click the **Add To Ticket** button.



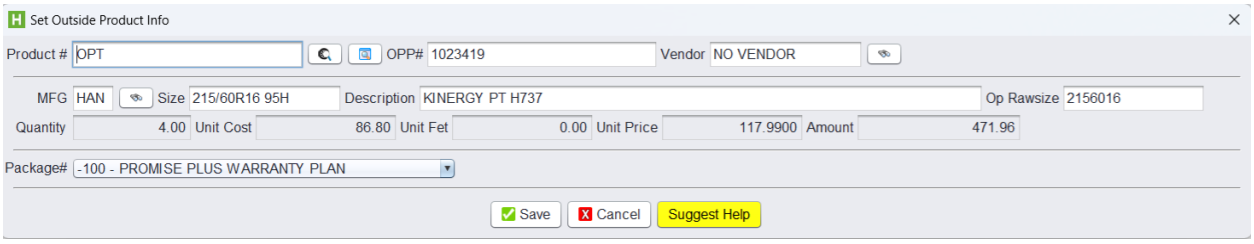
And then either to **New Ticket** or **Add To Last Ticket.**

. . . . . .

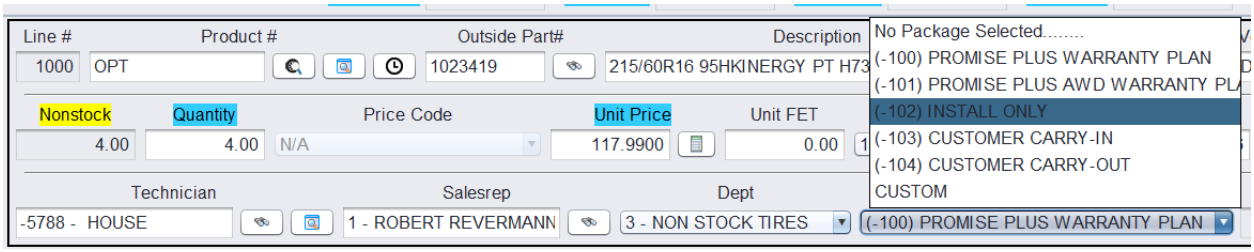
A pop-up will show how the item will be added to the ticket. If the item in Tire Connect matches a product code in your inventory, the product number will be added to the ticket.

If the item in Tire Connect does not match a product code in your inventory, the **OPT** (Outside Purchase Tire) product code will be used.

Click **SAVE** to add to ticket.



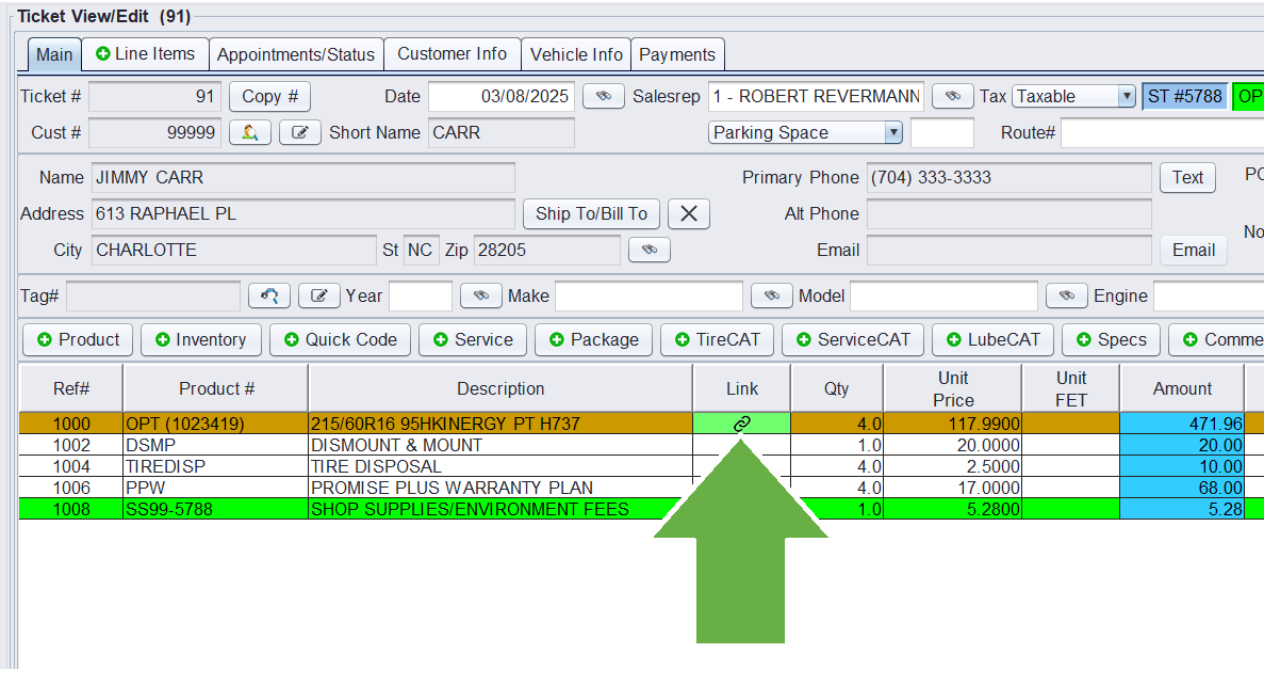
Regardless of where a tire has been added from the inventory lookup or from TireConnect, you will have the ability to change the tire package that is being sold with the tire from the **Line Item** tab.



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

Important! Do NOT delete the Promise Plus item off the tire package. Instead, if the customer has declined a Promise Plus plan, change the package to the basic "Install Only" package.

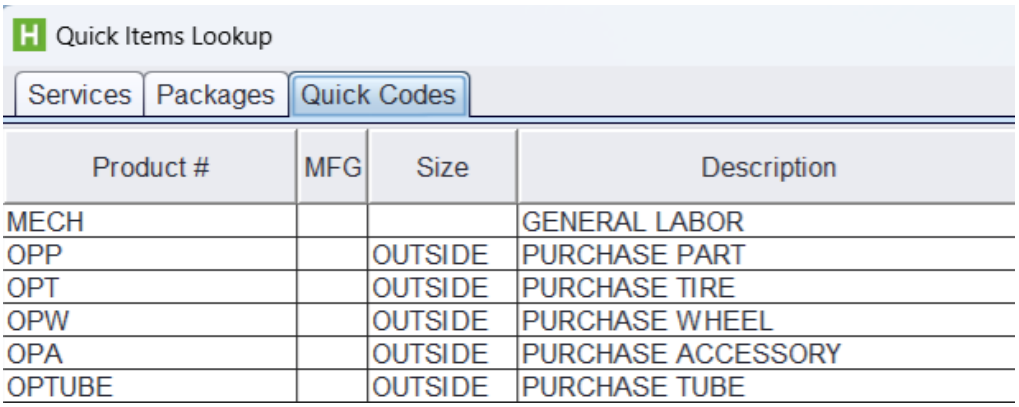
For any items that have been added to a ticket from TireConnect, the ticket will contain a **LINK** that can be clicked to retrieve the TireConnect quote and allow you to place an online order for tires from the supplier.



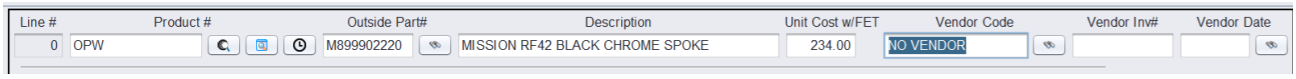
Outside purchases & quick codes

If selling outside, nonstock inventory or looking for quick code click the **+Quick Code** button.

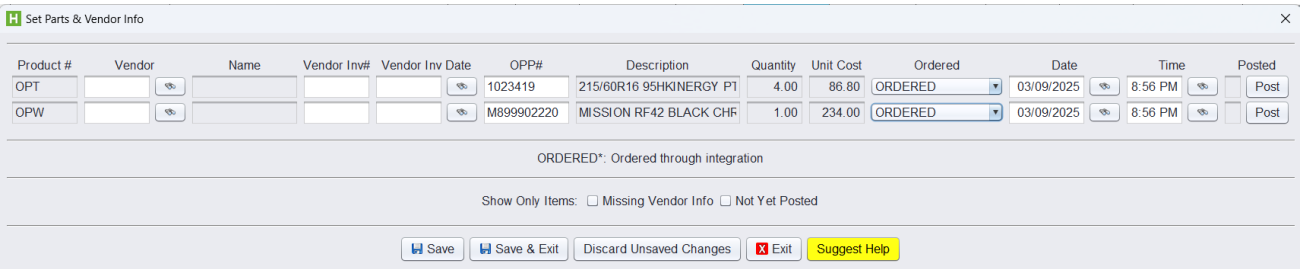
Double click on one of these items to add it to the ticket.



Outside purchase (nonstock) codes will **require** that you enter the **Outside Part #**, **Vendor**, **Vendor Invoice #**, and **Date** prior to closing the invoice.

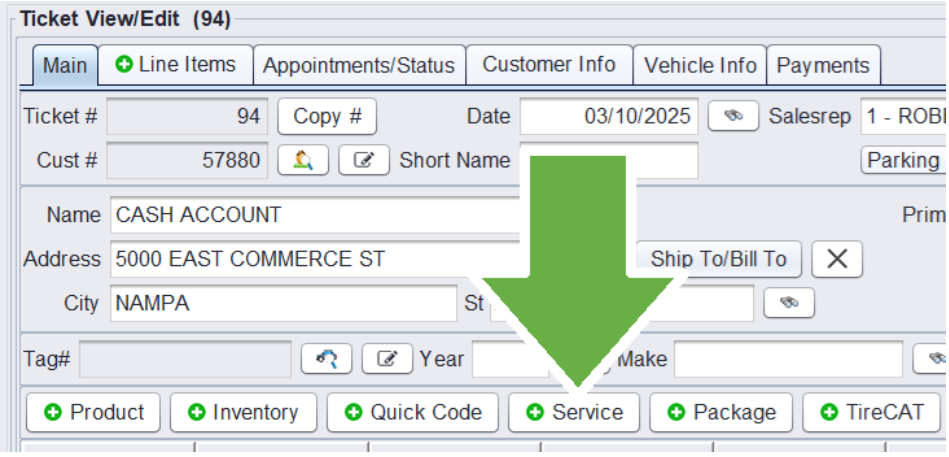


All outside, nonstock part data can be entered in bulk using the **Parts & Vendor Info** button from the **Line Items** tab of the ticket, you can also track when parts were ordered through this button.

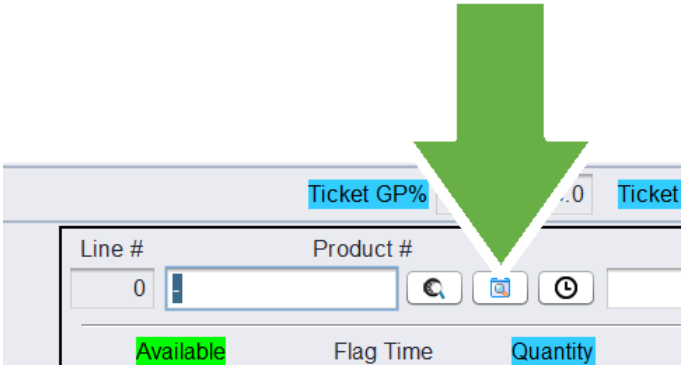


Services (Labor Codes)

To view and add stand-alone services (labor codes) to a ticket, click the **+ Service** button on the main tab of the ticket...



... or click the lookup icon from the Line Items tab:



This will show Gill's Point S product catalog of Services.

Quick Items Lookup

Services | Packages | Quick Codes

Product #	MFG	Size	Description	Qty St	Qty Corp	Aux	Price w/FET	GP%	W
DIAGAC			AC DIAGNOSTIC				120.00	100	
CMECHAC			AC LABOR - HEAVY DUTY				120.00	100	
INSPAC			AC PERFORMANCE				120.00	100	
CINSPAC			AC PERFORMANCE CHECK - HEAVY DU...				120.00	100	
ADASBASIC			ALIGNMENT ADAS BASIC DIAGNOSTIC F...				120.00	100	
ADASCODE			ALIGNMENT ADAS CODELINK SAFETY S...				120.00	100	
ADASPOST			ALIGNMENT ADAS DOCUMENTATION PO...				120.00	100	
ADASPRE			ALIGNMENT ADAS DOCUMENTATION PR...				120.00	100	
ADASWA			ALIGNMENT ADAS WHEEL ALIGNMENT				120.00	100	
ADASTEST			ALIGNMENT ASAS TEST DRIVE SYSTEM ...				120.00	100	
DIAGALI			ALIGNMENT DIAGNOSTIC				120.00	100	
CDIAGALI			ALIGNMENT DIAGNOSTIC - HEAVY DUTY				120.00	100	
ADASDIAG			ALIGNMENT DIAGNOSTIC INSPECTION				120.00	100	
INSPALI			ALIGNMENT INSPECTION				120.00	100	
CINSPALI			ALIGNMENT INSPECTION - HEAVY DUTY				120.00	100	
MECH			GENERAL LABOR				120.00	100	
BALC			BALANCE - COMMERCIAL				30.00	100	
BALD			BALANCE - DIAGNOSTIC				20.00	100	
BALLT			BALANCE - LIGHT TRUCK				17.50	100	
BALP			BALANCE - PASSENGER				15.00	100	

Double click a service/ labor code to add it to a ticket.

You can edit the **Quantity** if you need to adjust the time billed for hourly labor code.

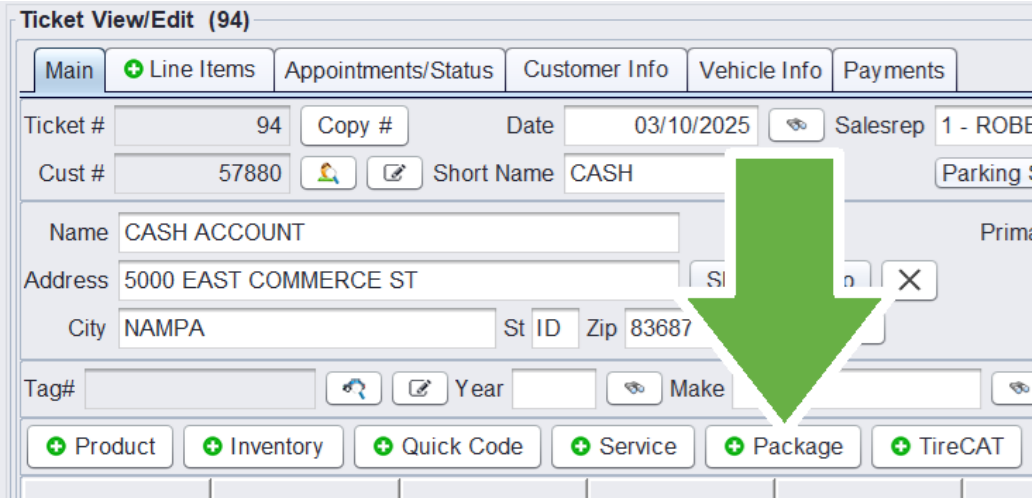
Line #	Product #	Description
0	MECH	GENERAL LABOR

Available	Flag Time	Quantity	Price Code
0.00	0.00	3.50	1 - Price 1 ($120.00)

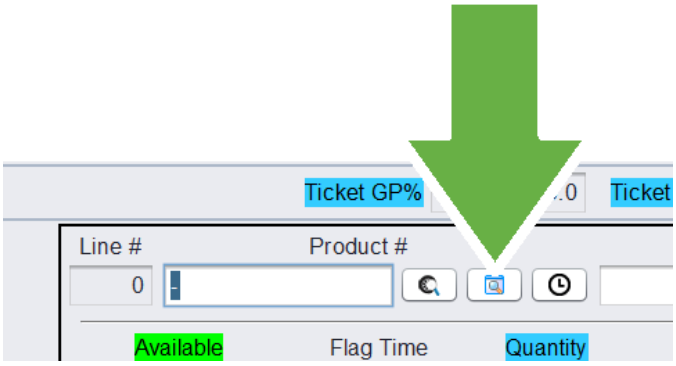
Click Save to add the service/ labor code to the ticket.

Packages

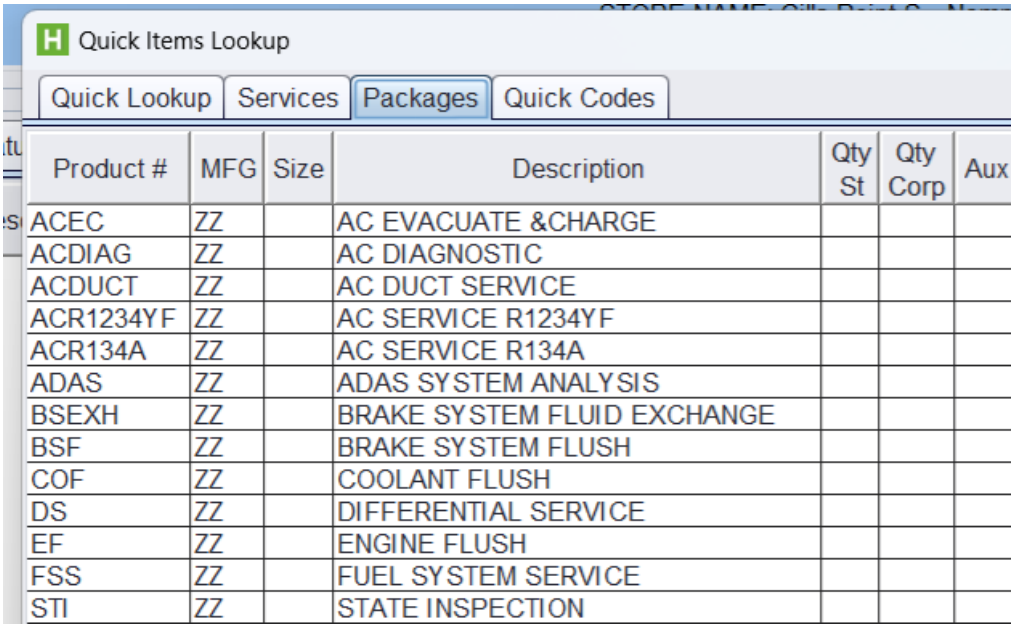
To view and add preventative maintenance packages to a ticket, click the **+Packages** button on the Main tab of the ticket...



... or click the lookup icon from the Line Items tab:



This will show Gill's Point S product catalog of Packages.



Product #	MFG	Size	Description	Qty St	Qty Corp	Aux
ACEC	ZZ		AC EVACUATE &CHARGE			
ACDIAG	ZZ		AC DIAGNOSTIC			
ACDUCT	ZZ		AC DUCT SERVICE			
ACR1234YF	ZZ		AC SERVICE R1234YF			
ACR134A	ZZ		AC SERVICE R134A			
ADAS	ZZ		ADAS SYSTEM ANALYSIS			
BSEXH	ZZ		BRAKE SYSTEM FLUID EXCHANGE			
BSF	ZZ		BRAKE SYSTEM FLUSH			
COF	ZZ		COOLANT FLUSH			
DS	ZZ		DIFFERENTIAL SERVICE			
EF	ZZ		ENGINE FLUSH			
FSS	ZZ		FUEL SYSTEM SERVICE			
STI	ZZ		STATE INSPECTION			

Double click a service/ labor code to add it to a ticket.

After adding a package to the ticket, *double click* the specific items inside of the package to edit.

. . . . . .

In HITS a package represents multiple products being sold together such as a Preventative Maintenance package that include inventory (fluids) and a labor line.

Preventative Maintenance packages are usually based on a standard capacity, and extra fluid would increase the price of the package.

Important ! The package pop-up should NOT be used for billing oil changes. Please use the **LubeCAT** function to invoice oil changes. More detail on LubeCAT is detailed below.

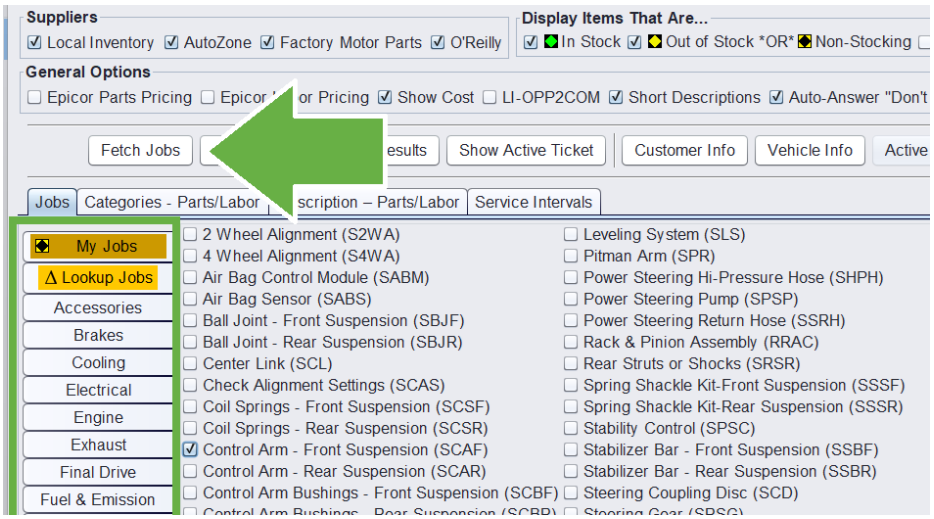
Mechanical repair & parts ordering (ServiceCAT)

ServiceCAT is the HITS wrapper around EPICOR (for shops familiar with using EPICOR).

ServiceCAT connects to your local parts suppliers for pricing and ordering, and include labor from the Mitchell labor guide as well as vehicle specifications, making it a great tool for quoting and invoicing mechanical repair jobs.

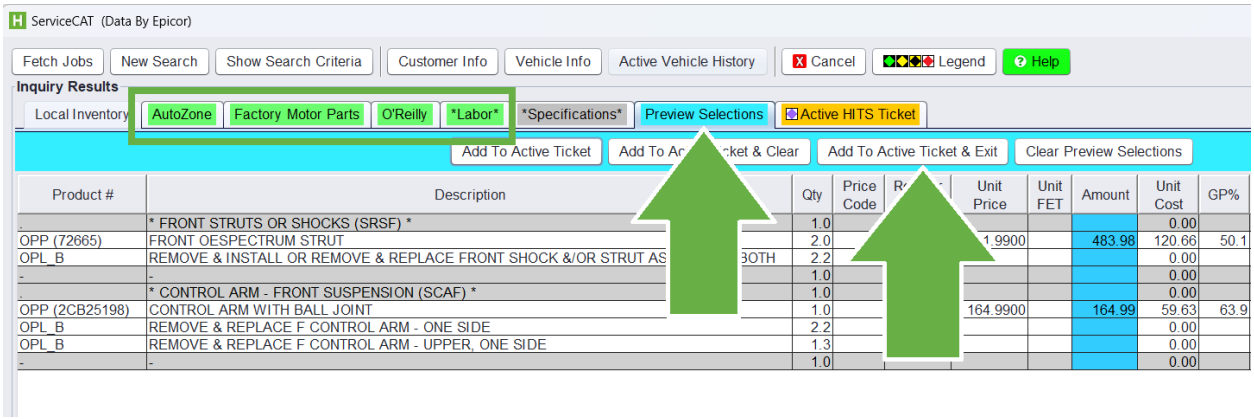
. . . . . .

In ServiceCAT, Select the jobs by category you are quoting and click **Fetch Jobs**.



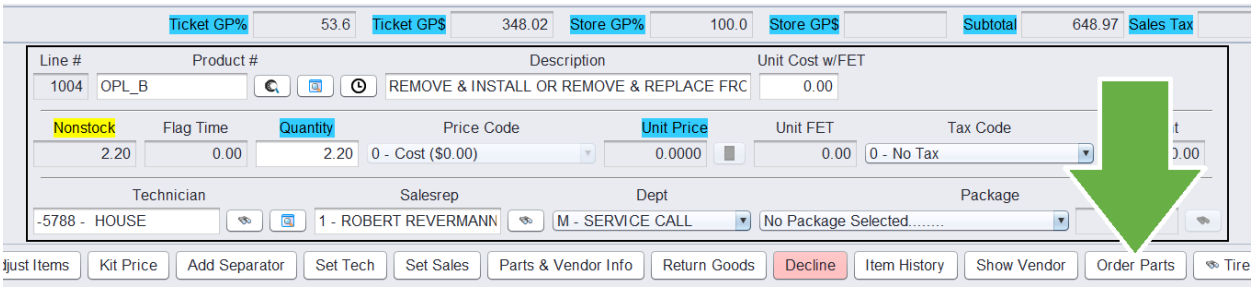
Select the parts from your supplier, and labor from the labor tab. After selecting parts and labor for each job, go to the **Preview Selection** tab.

If the quote looks good, you can click the **Add To Active Ticket & Exit** button to put the part and labor on the Quote.



You will need **Convert** your Quote to a Workorder to order parts through the system. To order parts, click the **Order Parts** button.

When ordering through the system, the system will use the Workorder# as the PO# when ordering to your supplier.

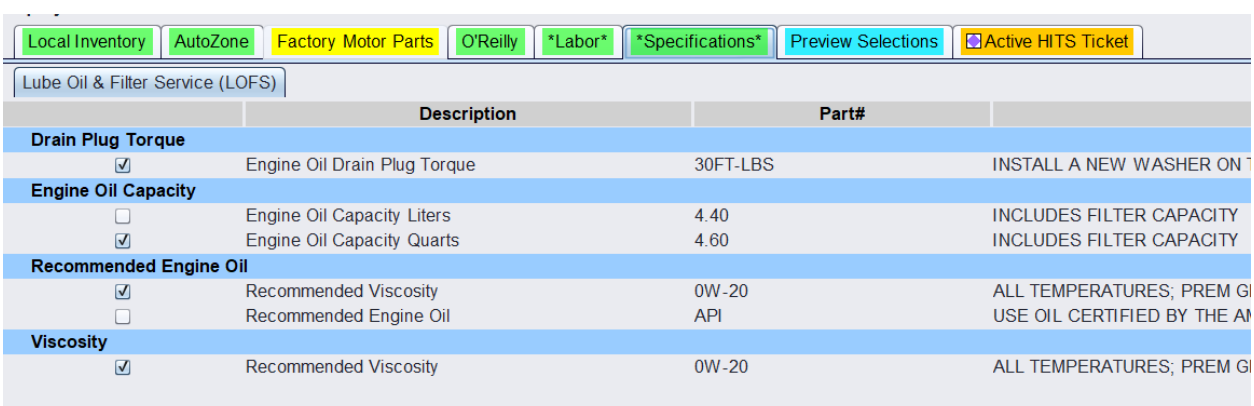


The parts ordering screen will confirm parts are still available and require you to click to order parts.

Orders will be sent to all suppliers that were shown on the order screen (if ordering from multiple vendors at one time.

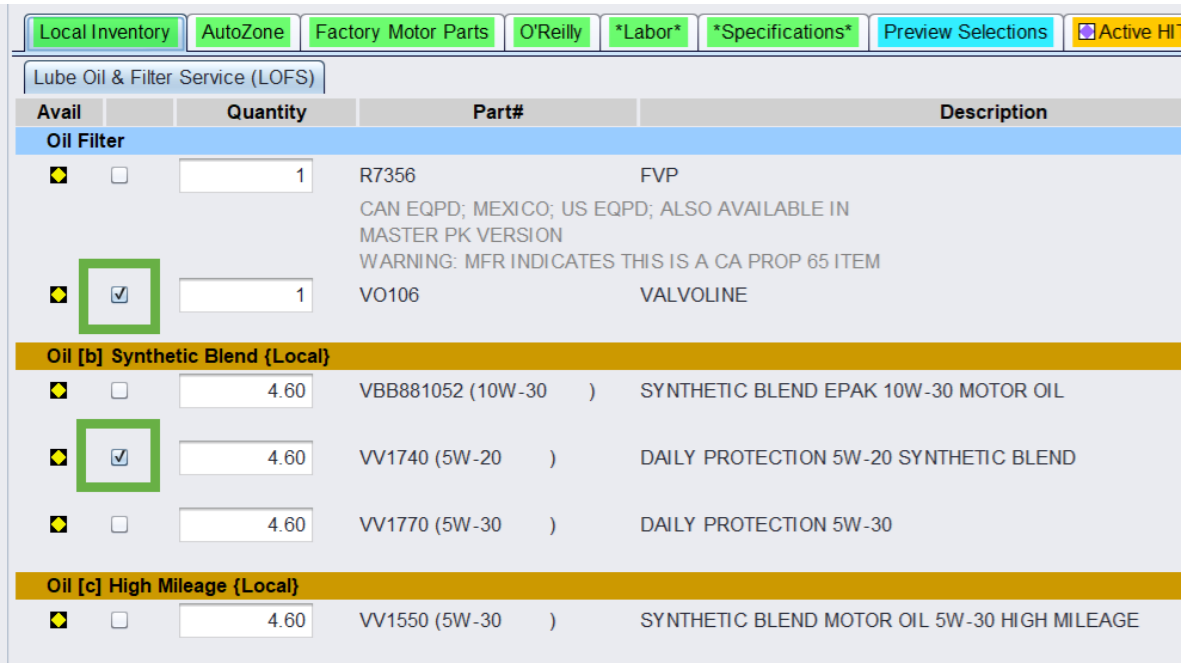
Oil Changes (LubeCAT)

The **Lube CAT** Vehicle Specific Oil Change function runs through ServiceCAT, and will land on the Specification tab. Here you can verify the correct specifications are chosen.

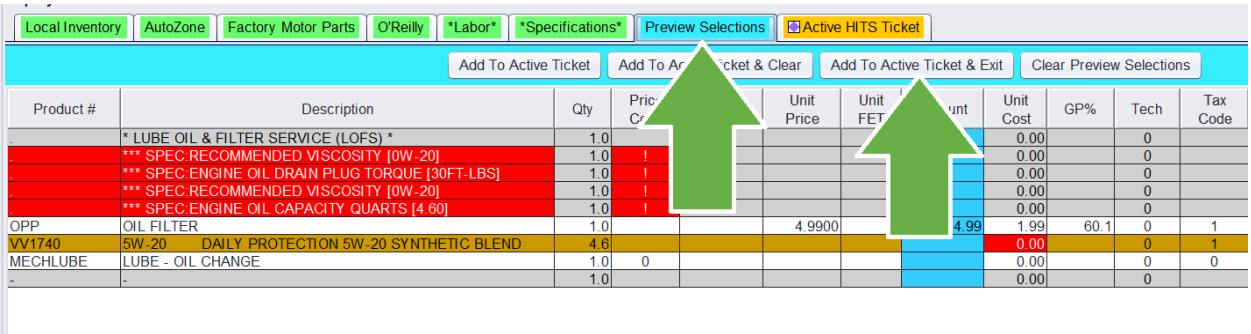


Next, click the **Local Inventory** tab.

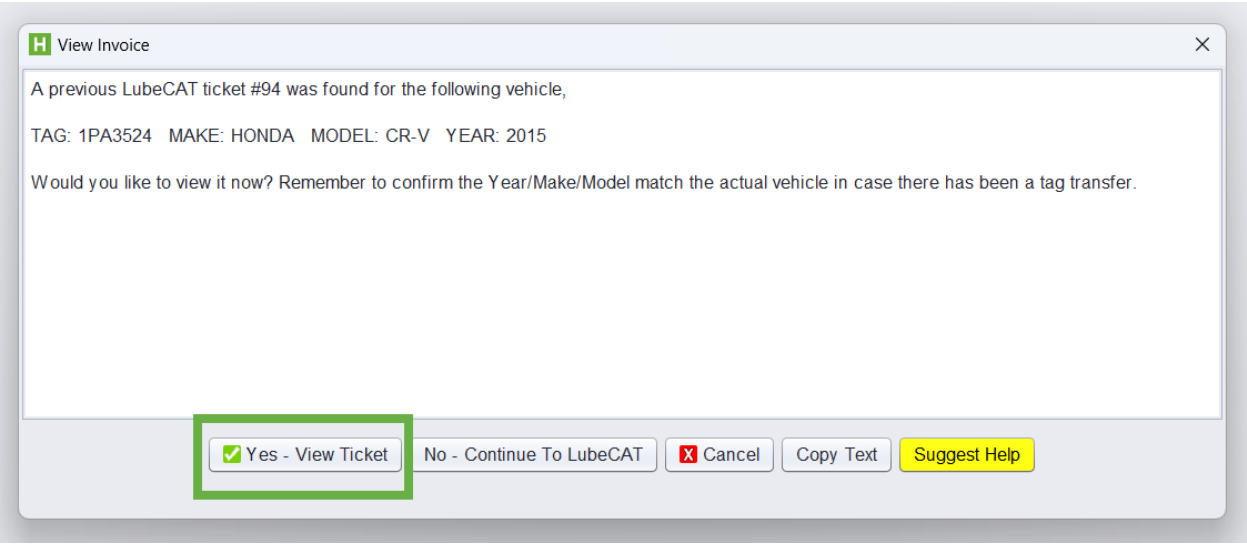
If the correct filter is in stock, it will be automatically selected. The only selection you will need to make is the oil you are selling the customer.



Click the **Preview Selections** tab to verify the oil change items are correct, and then click **Add To Active Ticket & Exit**.



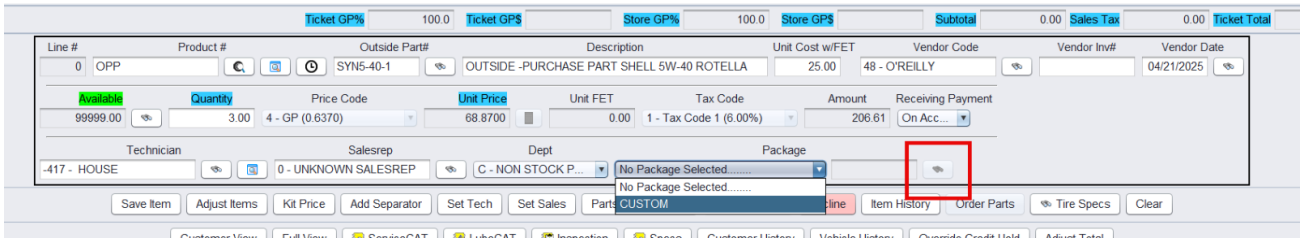
When a returning customer brings in a vehicle that has previously been serviced for an oil change, you will have the option to see the details of the last oil change invoice for this vehicle prior to proceeding to the VSOC feature in ServiceCAT so if a customer has a preferred oil you can recommend that oil prior to invoicing.



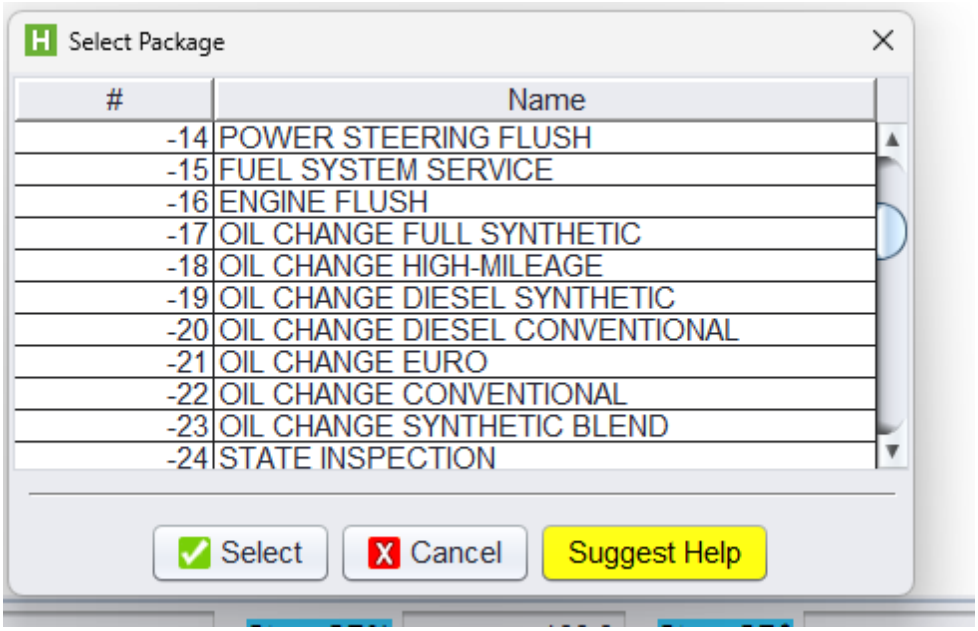
If your shop is set up for oil change stickers, use the **Print**, and **Print Oil Decals** to print oil stickers.

To add an OPP oil change package outside of Lubecat. Follow these steps:

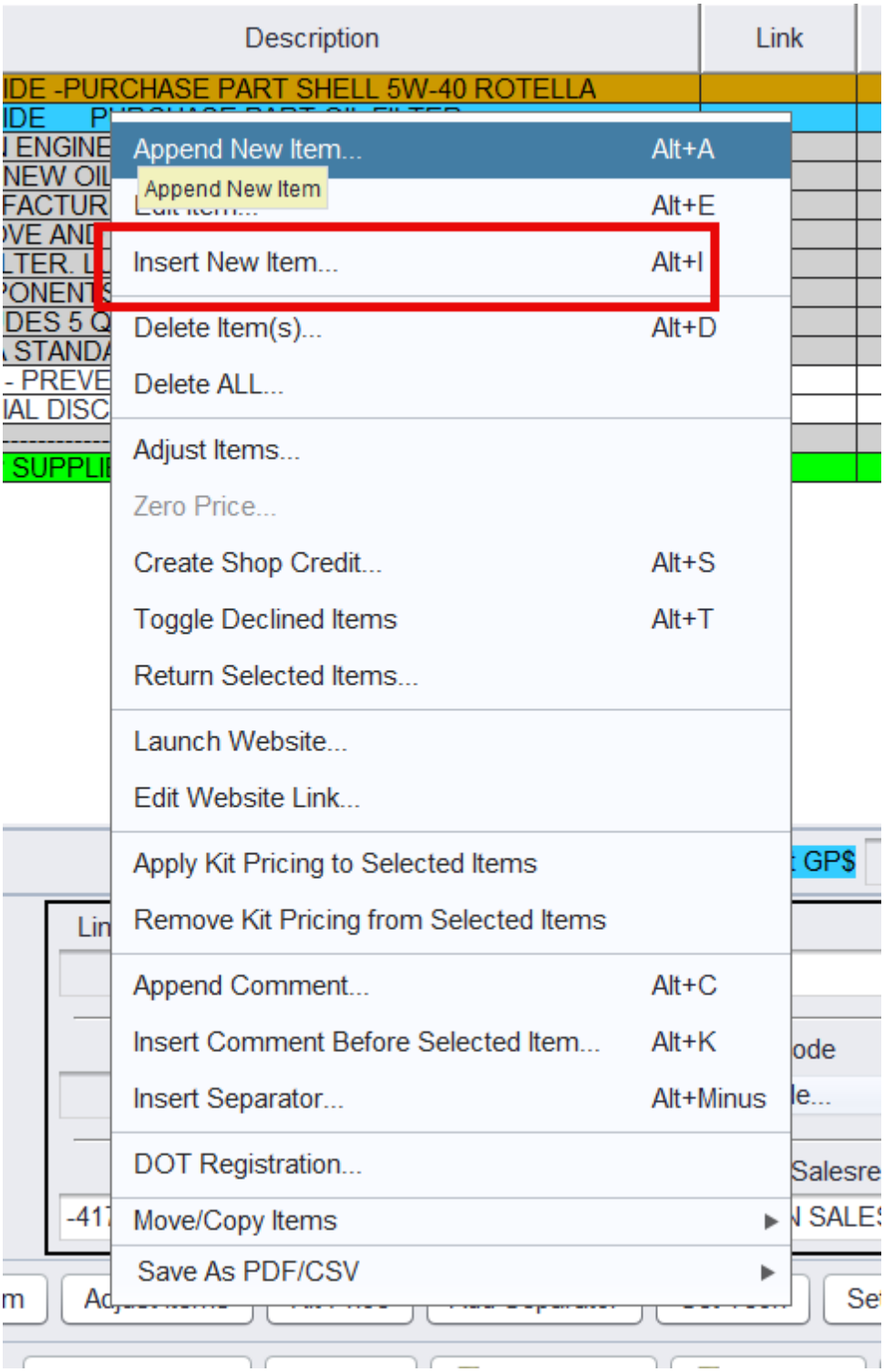
1. Enter the oil product as an "OPP".
2. Under the package section, select "custom".



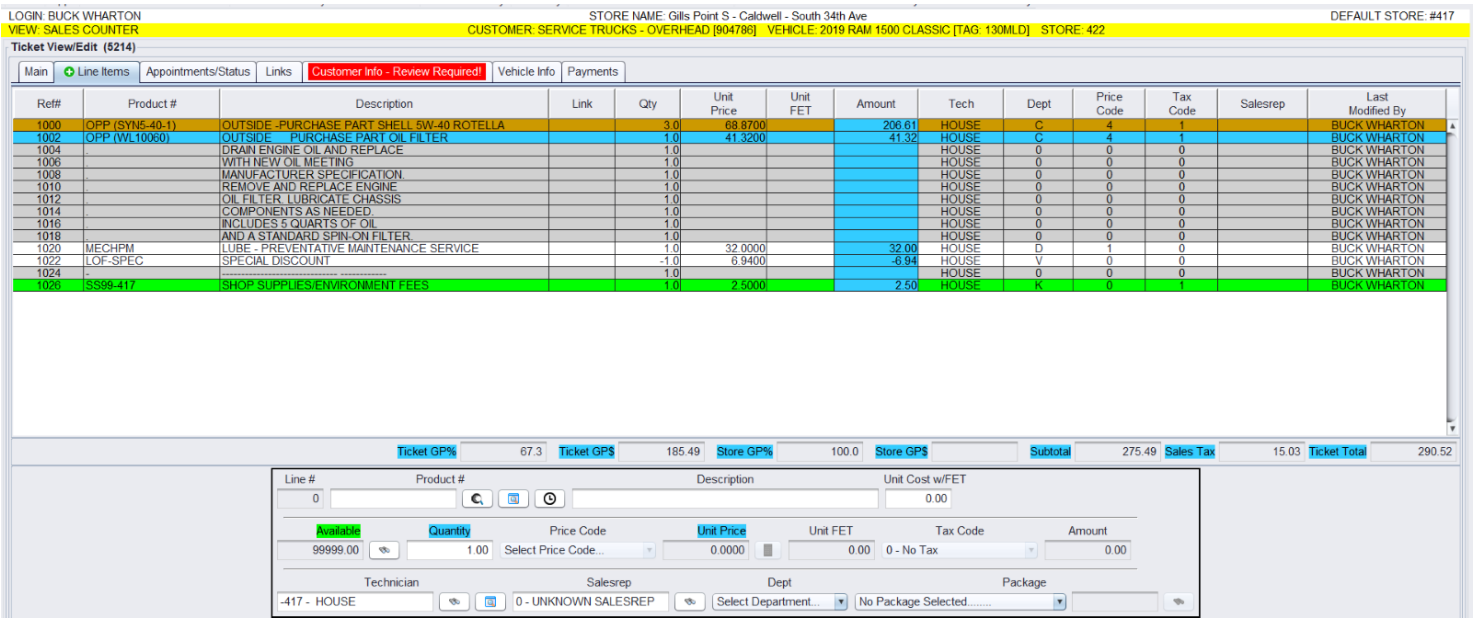
3. Click the binoculars icon and choose the type of oil change (e.g., full synthetic).



4. Press "save item" to save the OPP as an oil change package. (Note, you can also add other custom packages)
5. Additionally, add an “OPP” filter by right-clicking the line under the oil, selecting "insert new item", and choosing the appropriate part.



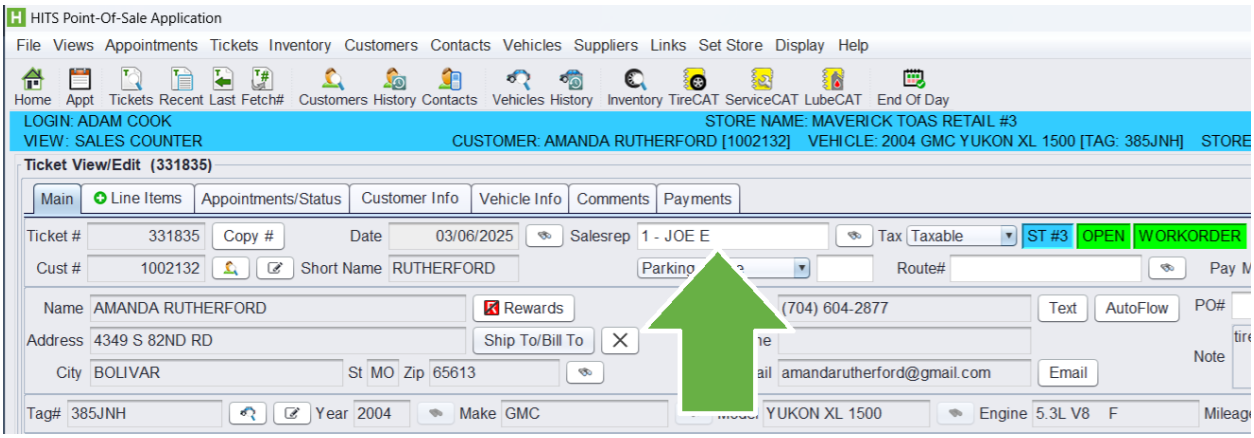
6. Add the filter like any other OPP Part; this will add it to the oil change package.



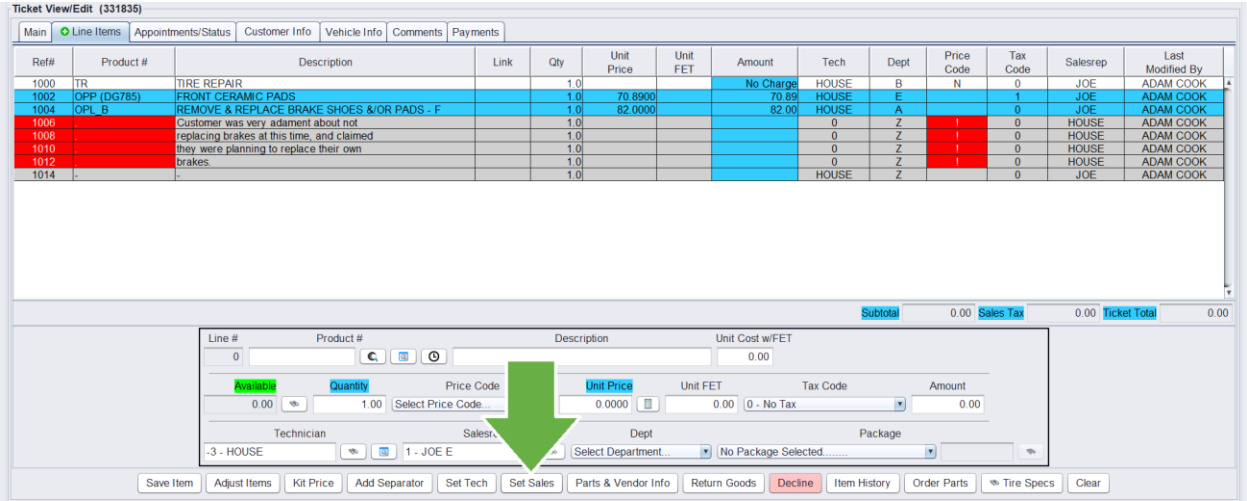
h. Setting Salesrep & Technician

When creating a new ticket, the system will prompt for adding a Salesrep code. The Salesrep code may automatically default based on your workstation settings.

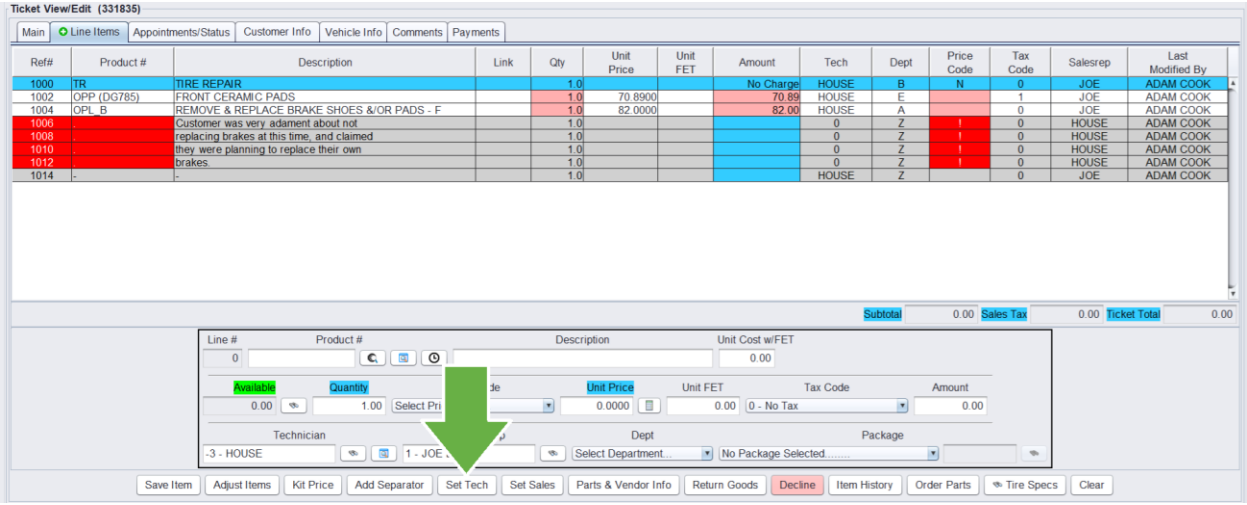
After starting a ticket, the Salesrep will be shown on the Main tab of the ticket.



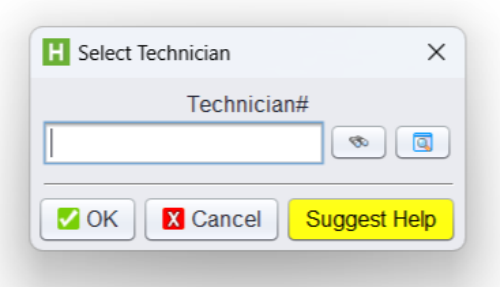
This will default all lines item to this ticket to this Salesrep, however from the **Line Items** tab, items sold by a different Salesrep can be flagged by highlighting the items and clicking the **Set Sales** button.



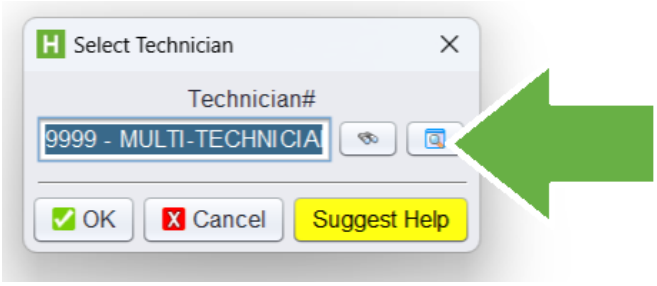
Next to the Set Sales button (on the **Line Item** tab), will be the **Set Tech** button which can be used to assign line items to the technician performing the work. (Highlighting all line items at one time will allow you to Set Tech for all line items at once).



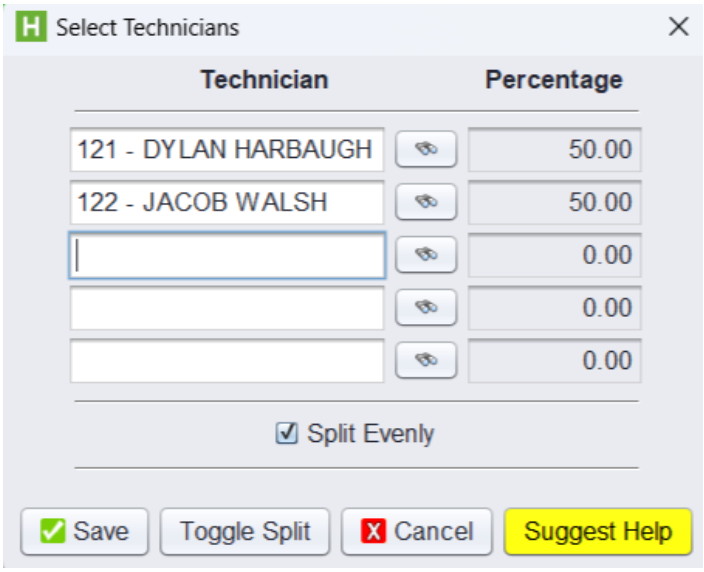
A pop-up window will allow you to enter the technician's code.



To split the line item across multiple technicians, select the option **MULTI-TECHNICIAN** , the select the button shown below.



This will allow you to set line item splits by percentage.



i. Line items display

There are few optional functions to move or arrange items to change the display of line items on ticket.

Delete

To delete line item, make sure you are in the line items tab, highlight the items to be deleted, right-click and select **Delete Items**.

Order

To change the order of line items, select the line item, and then use your keyboard **ALT + UP ARROW** or **ALT + DOWN ARROW** to move items up or down on the ticket.

Kit Price

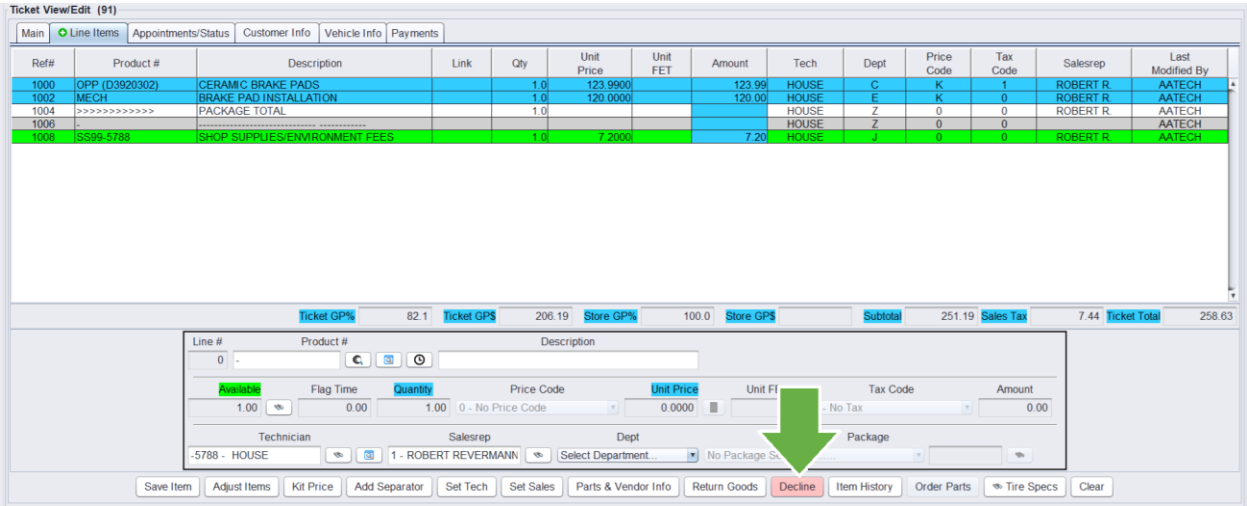
After selecting multiple items, you can use the **Kit Price** button to total multiple items to a single price on the customer's invoice.

Add Separator

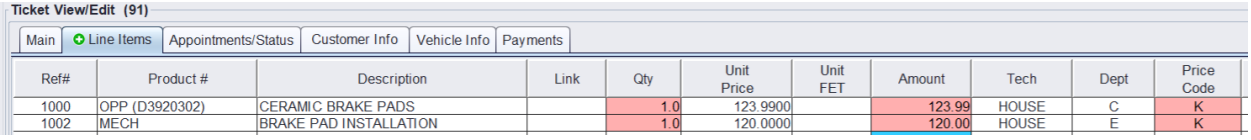
You can use the **Add Separator** button to add a separator line between jobs on the ticket. (the separator will be placed before the selected item)

j. Declining Items

To decline line items, from the **Line Items** tab of the ticket, highlight the items to be declined and click the **Decline** button.



Declined items will show highlighted in light red on the ticket and will print on the customer's invoice a DECLINED.

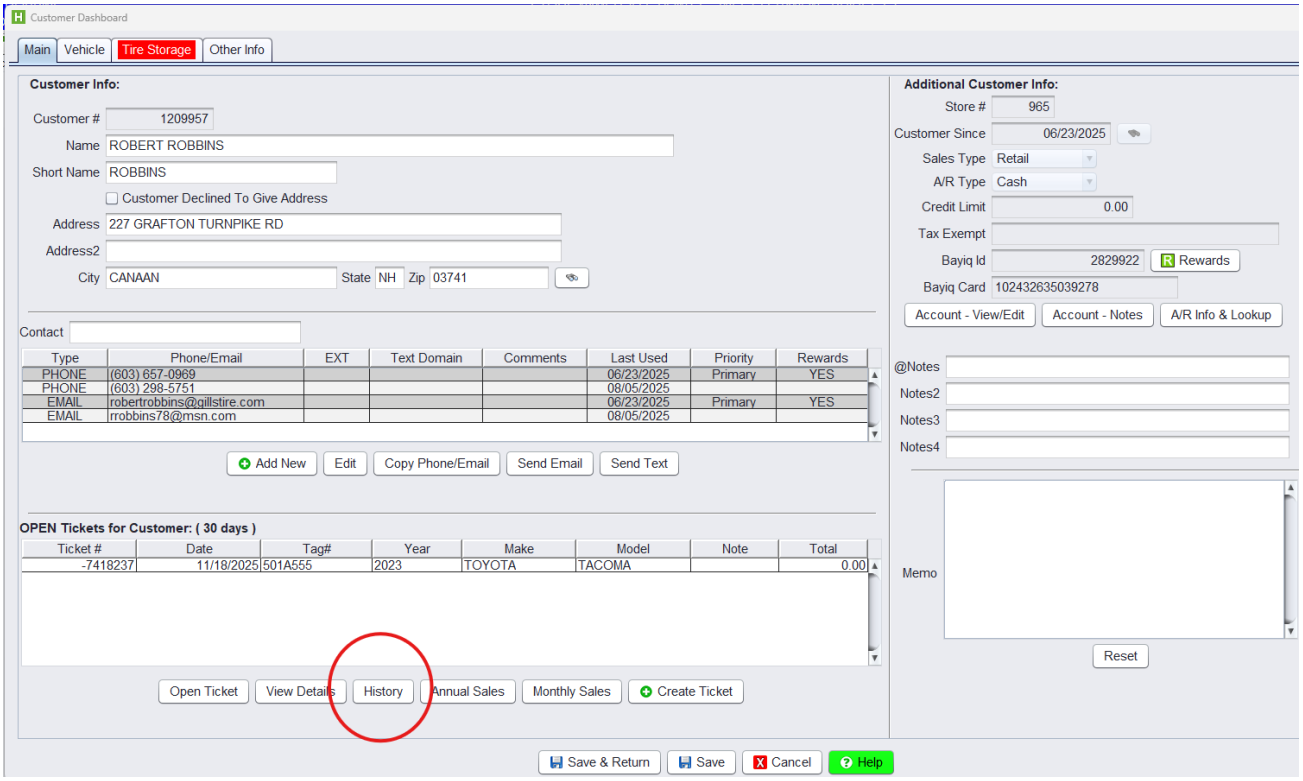


Ref#	Product #	Description	Link	Qty	Unit Price	Unit FET	Amount	Tech	Dept	Price Code
1000	OPP (D3920302)	CERAMIC BRAKE PADS		1.0	123.9900		123.99	HOUSE	C	K
1002	MECH	BRAKE PAD INSTALLATION		1.0	120.0000		120.00	HOUSE	E	K

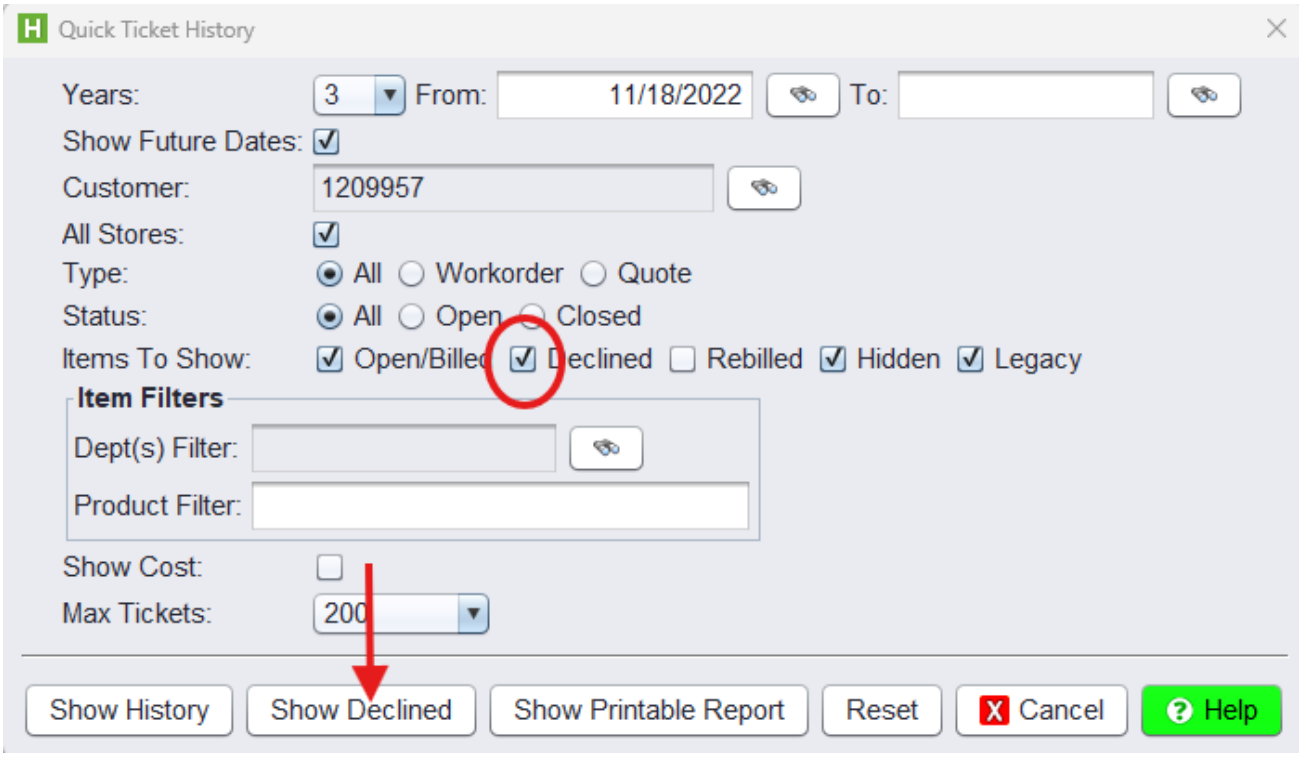
The same **Decline** button can used to un-decline items to turn them back billable.

Finding And Selling Declined Items

There are a few ways to find declined items. Start with the customer lookup button. Find the correct customer and from their customer dashboard, click on “History”.

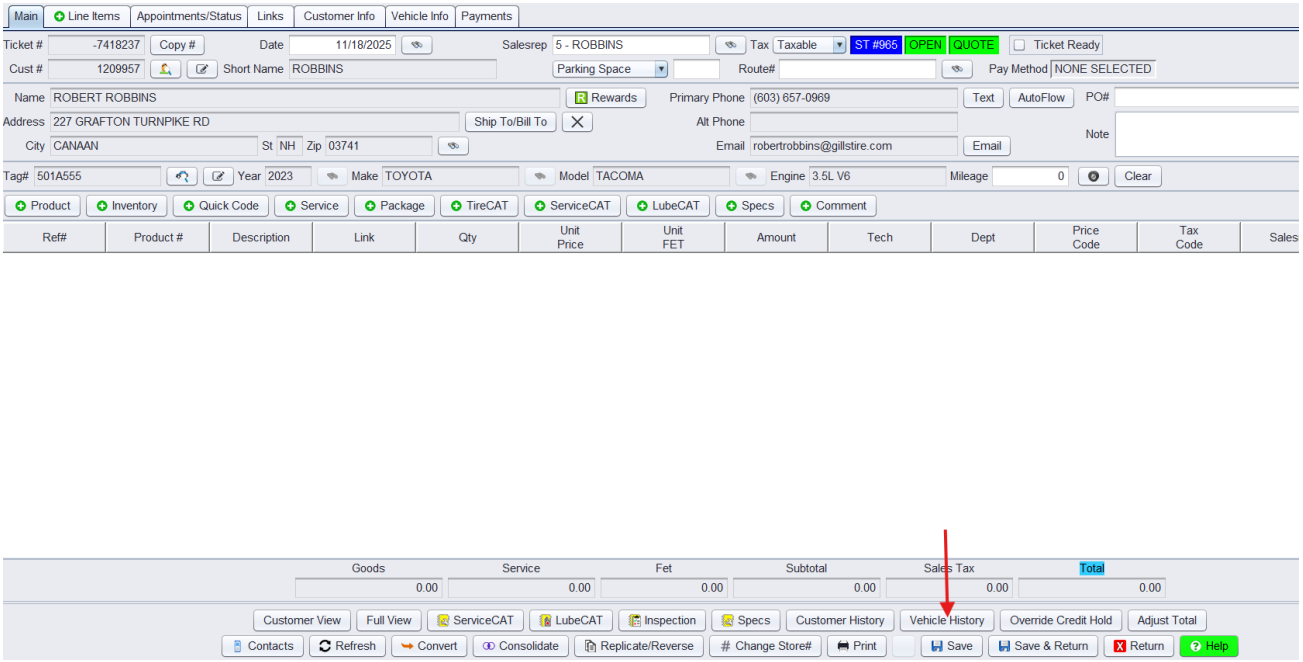


Select declined on the “Items To Show” filter and then select “Show Declined”.

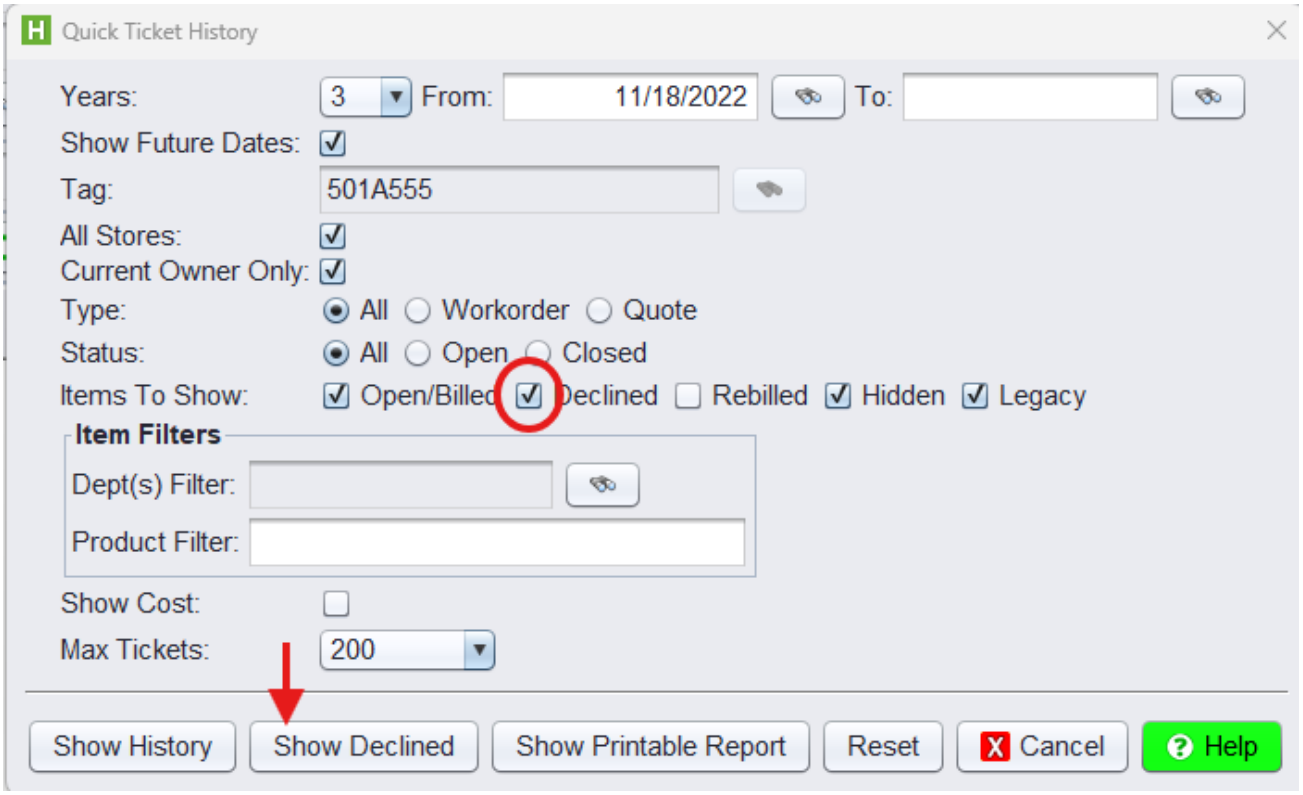


This will pull up all declined items for any vehicle in this customer's history.

If you already know which vehicle they have declined items on, and you want to proceed, create a quote for the customer. Make sure the correct vehicle is attached and select “Vehicle History”.



Check off Declined as the “Items To Show”, then click on “Show Declined”.

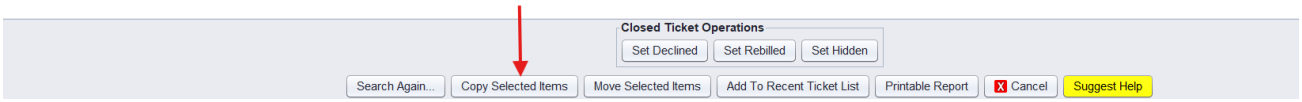


This will list everything for this vehicle that has been declined.

Ticket Date	ST#	Ticket #	Product #	Description	QTY	Unit Price	Amount	PC	ST	Dept	Tech	SR#	Vendor#	Mileage
08/25/2025	965	125860	Closed Workorder				0.00							150000.0
			TIRESTORAGE	TIRE STORAGE - PER SET	1.00	80.0000	80.00	2	R	7	-965	5		
			PCD1	ITEMS ADJUSTED BY $20.00	-1.00	20.0000	-20.00	0	R	1	-965	5		
			TCOP	TIRE CHANGE OVER FLT	1.00		0.00	0	R	0	-965	5		
			TCOP-DSMP	DISMOUNT MOUNT AND BALANCE (PER AXLE)	1.00	49.9500	49.95	1	R	7	-965	5		
			TCOP-DSMP	DISMOUNT MOUNT AND BALANCE (PER AXLE)	1.00	49.9500	49.95	1	R	7	-965	5		
				DISMOUNT CURRENTLY INSTALLED TIRES, MOUNT, BALANCE, AND INSTALL SEASONAL TIRES.	1.00		0.00	0	R	0	-965	5		
			-	---------- ----------	1.00		0.00	0	R	0	-965	5		

From here, highlight the items you want to put on your current ticket and then select “Copy Selected Items”.

Ticket Date	ST#	Ticket #	Product #	Description	QTY	Unit Price	Amount	PC	ST	Dept	Tech	SR#	Vendor#	Mileag
08/25/2025	965	125860	Closed Workorder				0.00							1500
			TIRESTORAGE	TIRE STORAGE - PER SET	1.00	80.0000	80.00	2	R	7	-965	5		
			PCD1	ITEMS ADJUSTED BY $20.00	-1.00	20.0000	-20.00	0	R	T	-965	5		
			TCOP	TIRE CHANGE OVER PLT	1.00		0.00	0	R	0	-965	5		
			TCOP-DSMP	DISMOUNT MOUNT AND BALANCE (PER AXLE)	1.00	49.9500	49.95	1	R	7	-965	5		
			TCOP-DSMP	DISMOUNT MOUNT AND BALANCE (PER AXLE)	1.00	49.9500	49.95	1	R	7	-965	5		
			.	DISMOUNT CURRENTLY INSTALLED TIRES, MOUNT, BALANCE, AND INSTALL SEASONAL TIRES.	1.00		0.00	0	R	0	-965	5		
			-	---------- ----------	1.00		0.00	0	R	0	-965	5		



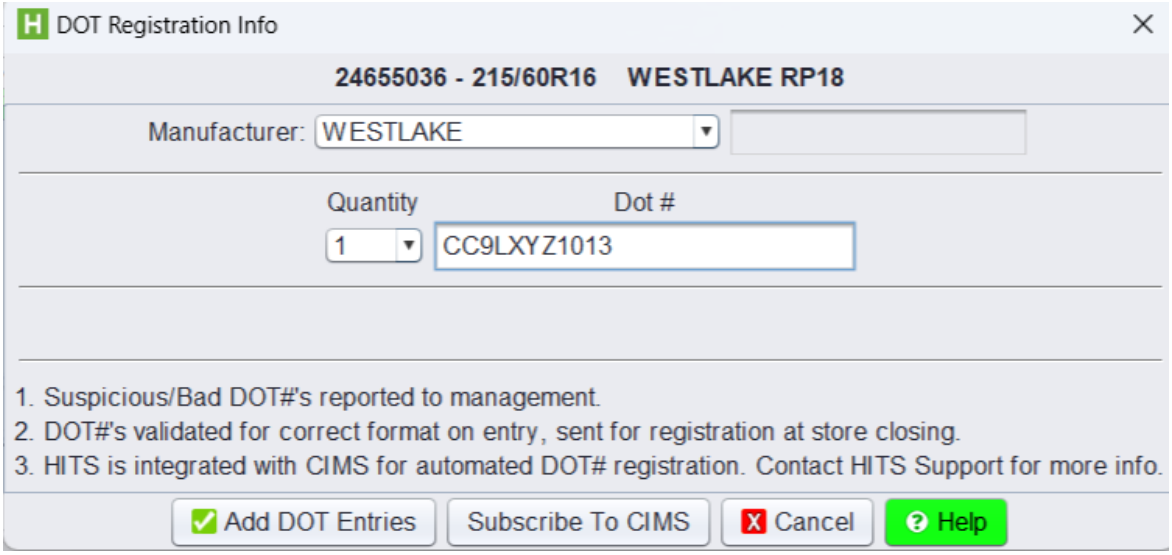
This will automatically paste them onto your new estimate for the customer.

k. DOT #s

Federal Law requires that tire installers provide DOT#s to consumers.

To enter DOT# for tires on the Workorder, highlight the tire line items, *right-click* and select **DOT # Registration**

Ensure the **Manufacturer**, **Quantity**, and **DOT#** is entered correctly, and then click **Add DOT Entries**.



This will add the DOT#s to the Workorder.

1008	24655036	215/60R16 WESTLAKE RP18		1.0	100.5700		100.57
1010	DSMP	DISMOUNT & MOUNT		1.0	20.0000		20.00
1012	TIREDISP	TIRE DISPOSAL		1.0	2.5000		2.50
1014	PPW	PROMISE PLUS WARRANTY PLAN		1.0	17.0000		17.00
1016	DOT## (24655036)	WESTLAKE CC9LXYZ1013		1.0			
1018	SS99-5788	SHOP SUPPLIES/ENVIRONMENT FEES		1.0	2.5000		2.50

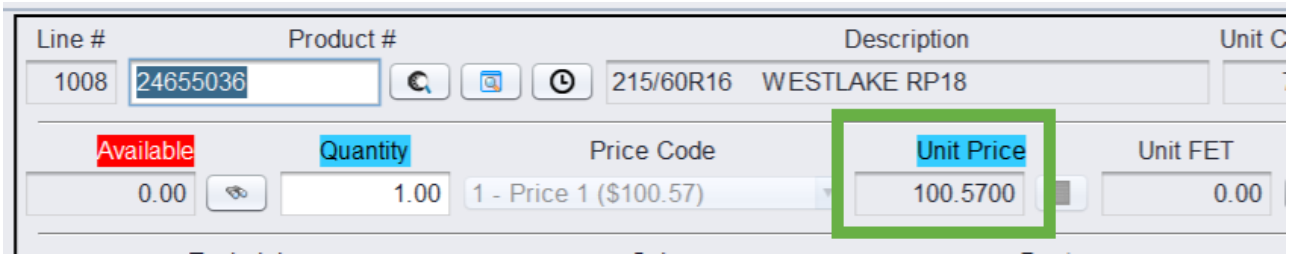
l. Discounts & Price Adjustments

This section will discuss all price adjustments that can be made to a ticket including discounts, loyalty rewards, warranty adjustments, non-warranty adjustments, and employee discounts.

The only discount codes that reside in HITS are product numbers that begin with PCD. All other retail customer discounting is handled through the Gills Rewards Program (currently managed by BayIQ). If a customer wants to receive any offer or discount, they must become a rewards member to access an offer or discount code (including Military, AAA etc.) at the time of checkout in HITS.

If a customer wants to opt out of rewards program communication, they always can from Gills Rewards follow-up emails or SMS texts (depending on opt –in selection).

i. **Price Lock** - The majority of products and services in the system have been set to Price Lock meaning the Unit Price on the item cannot be edited and the only way to reduce the selling price is to use a discount / adjustment code applied to the item or the ticket total. You will be able to tell if the price for an item has been locked if the **Unit Price** is *greyed out*.



Other items like MISC labor codes will allow the **Unit Price** to be edited.

DISCOUNT CATEGORIES:

There are two distinct categories of discounts that can be offered. **Standing loyalty discou**nts are those only eligible to customers who sign up to become a Gills loyalty member and are managed by Gills Marketing outside of HITS (via Bay IQ). The second category is manager discretion discounts that can be used at the Service Center Managers discretion and does not require the customer to be a loyalty member.

Standing Loyalty Discounts:

These are only eligible to customers who have a Gills Reward account (currently managed via Bay IQ). The following discounts are managed by Gills Marketing in the BayIQ platform and will be seen in HITS at checkout if the customer is a Gills loyalty member. See BayIQ section of manual.

- Friends and Family Discount (5% off). Add the name of the Gills employee connected to the customer into the notes in HITS.

- AAA Discount (5% off). The customer's 16-digit AAA card number is required to be entered as a note in HITS.
- Senior Discount (5% off). Eligible for customers 60 years or older.
- Student Discount (5% off). Student ID must be presented at the time of purchase.
- Note that Military Customers accrue points at a higher rate than Retail Customers, and this is considered our Military discount. Make sure to enroll them as Military Customer.

Manager Discretion Discounts:

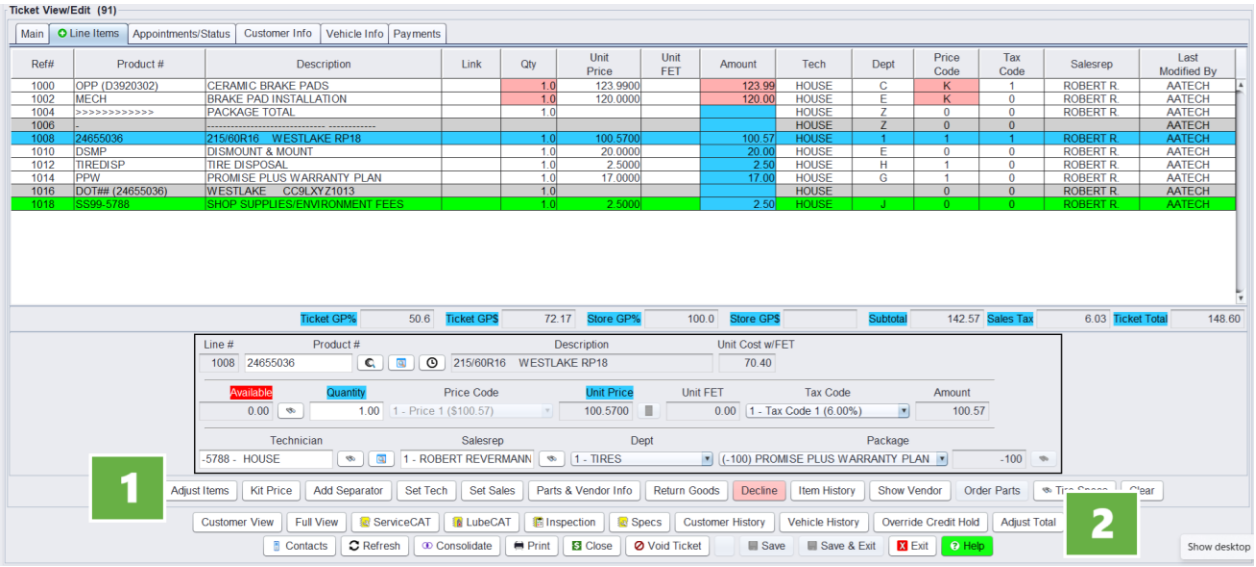
These discounts can be used at the Service Center Manager discretion and are monitored through reporting to ensure they used appropriately:

- Customer Satisfaction Discount (%). Percent amount is the Service Center Manager's discretion, and ca be used for a variety of situations needed to resolve a customer issue and ensure satisfaction. This code will be monitored by the business to ensure its appropriate use. In the description line please add reason for the customer satisfaction. Use the code: **CSAT** to discount at checkout.
- Price Match Guarantee ($ off). Amount varies, and the customer must present a valid local competitor quote for full out the-door price for same manufacturer part number. Review the Gills price match policy here: Price Match Guarantee One Sheet - Gills Point S
- Employee Discount – see instructions below.

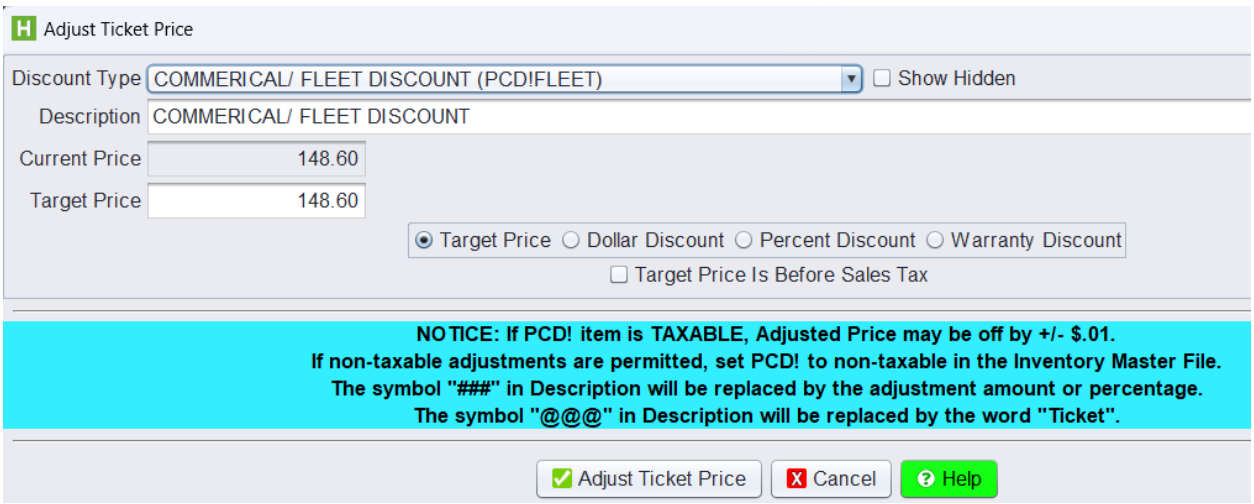
To discount items, there are two options:

1] Adjust Items button will adjust the selected item(s).

2] Adjust Total button will adjust the total ticket.



Both options will load the **Adjust Price** pop-up which will be used for **<u>all</u>** <u>discounts and adjustment types.</u>



Select the appropriate discount/ adjustment code from the dropdown.

The Adjust Price pop-up will allow you to set the discount/ adjustment by

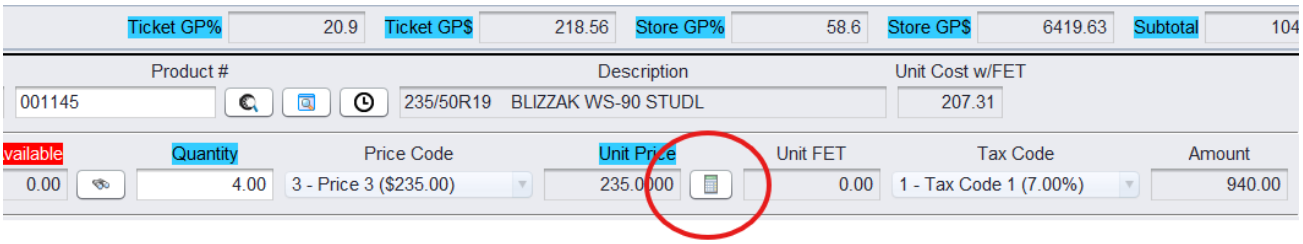
Target Price, **Dollar Discount**, or **Percentage Discount.**

After entering the correct discount amount, click **Adjust Price** button.

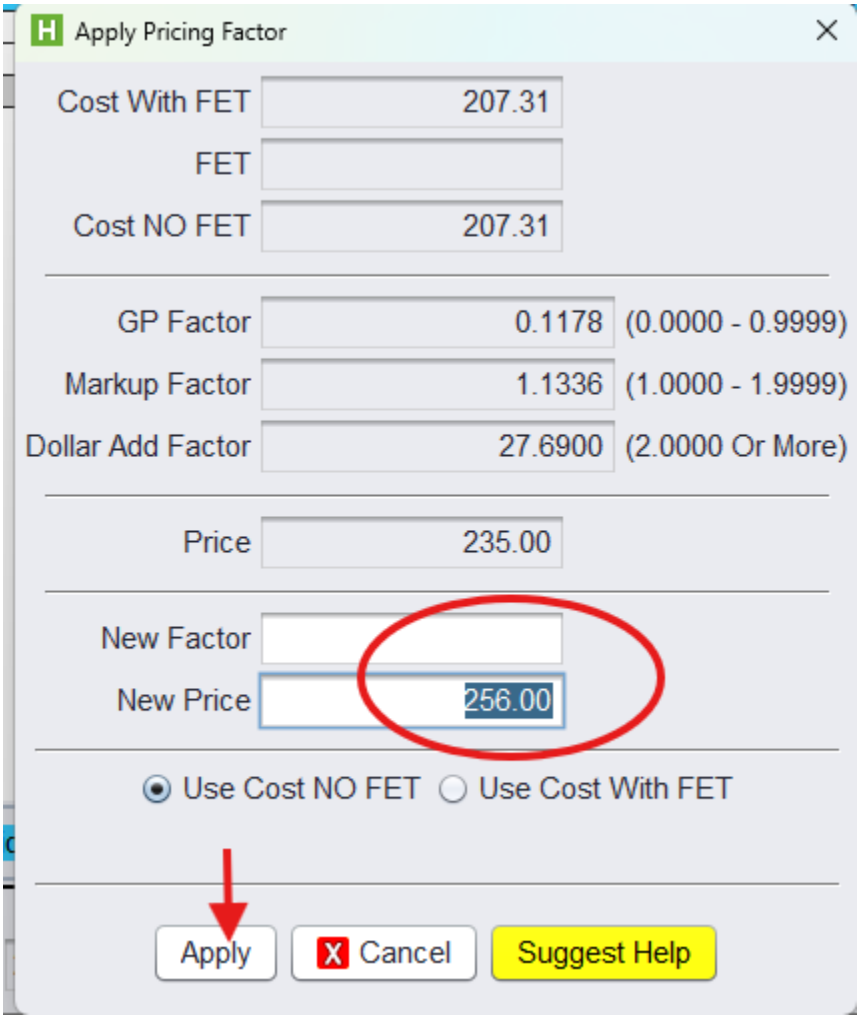
Loyalty points will automatically populate.

Adjusting Pricing Up

From time to time, you will find it necessary to make the dollar figure on an item larger, depending on things like your market, customer or situation. To do this, from the line items tab, doubleclick on the item you need to adjust up. Then next to the unit price, click on the calculator.



Then input your new price as long as it is greater than the original price and click apply.



Employee Discounts

GILLS EMPLOYEE DISCOUNTS

The Gills Employee Discount Program (following successful completion of Introductory period) offers two discounts for employees. Additional requirements about this program may be found in Appendix A of the Gills Employee Handbook. These discounts are:

1. Tire, parts and tools = cost + 10%

Tires, parts and tools bought through Gills Tire will be rebilled at cost plus 10% to the employee. Adjust the item prices by using the discount code: EE TIRE-PART-TOOL

2. Labor = service center labor rate – 40%

Labor provided by Gills Tire for employee vehicles is billed at the standard labor rate for the service center that the employee is using, less 40%. Adjust the labor price by using the discount code: EE LABOR, by entering the new manually calculated discounted labor price.

**In no circumstance is any Gills service center operator allowed to use an open work order in HITS to extend credit to an employee. To assist an employee with payment of Gills Tire products or services, connect the employee with your Service Center Accountant (SCA) for assistance. Credit and payment programs exist to support Gills employee purchases and needs.

Employee discounts will need to be applied using two different adjustment codes.

- **EE TIRE-PART-TOOL (COST + 10%)**
- **EE Labor Discount (40 OFF %)**

See your Gills Point S Employee Handbook for more detail on how to calculate your employee discount.

All discounts and adjustments will add a line item to the ticket with a product code that starts with “PCD-”

PCD!FLEET	COMMERICAL/ FLEET DISCOUNT		-1.0	14.8600		-14.86

OFFERS AND REBATES:

Regional and Location Specific Offers:

*Only Available Via Coupon.

Throughout the year, Gills may offer specific discounts and promotions that can only be redeemed by signing up for the Gills rewards program, that are managed by Marketing outside of HITS (currently via Bay IQ). Within the discounting screen in HITS, you will see these appear with the following convention:

"With Coupon Only: (Coupon offer description)"

- Ie. With Coupon Only: Get $25 off any service over $75
- These offers are only to be redeemed if the customer presents this coupon at the counter.

National Rebates:

You will see National Rebates in the discounting screen in HITS, like the following examples:

- "[Brand Name] Rebate: Rebate Description"
- *Up to [Insert Highest Dollar Amount of rebate] Off Select Sets Of [Brand Name] Tires
- I.e. Bridgestone Rebate: Up to $100 off select sets of Bridgestone Tires

These can be applied to the work order to track customers who will be taking advantage of a national rebate going on. NO discount should be applied to this line item unless otherwise specified, as most national rebates are online submission.

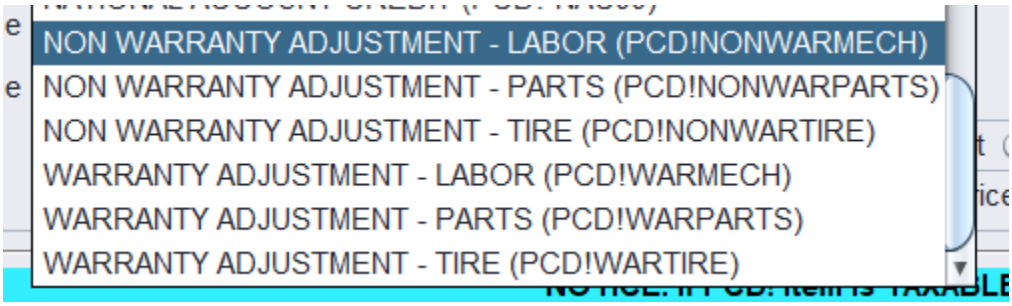
Undo / Delete

To undo, or reapply a discount or adjustment code, delete the adjustment line item and reapply the discount/ adjustment.

Warranty & Non-Warranty Adjustments

To warranty items, there are two options: You also use the 1] Adjust Items button to adjust the selected item(s). 2] Adjust Total button to adjust the total ticket.

Adding a warranty line is the same process as adding an adjustment or discount you need to scroll to the bottom items on the list.



To make a warranty or non-warranty adjustment, select the correct Discount Type from the dropdown.

• Non Warranty adjustment lines should be used when you are warranting an item or service that is the fault of the service center. (I.E. the tire technician tore the bead of the tire on installation or removal from the rim. The technician did incorrect adjustments on alignment and needed to be redone)

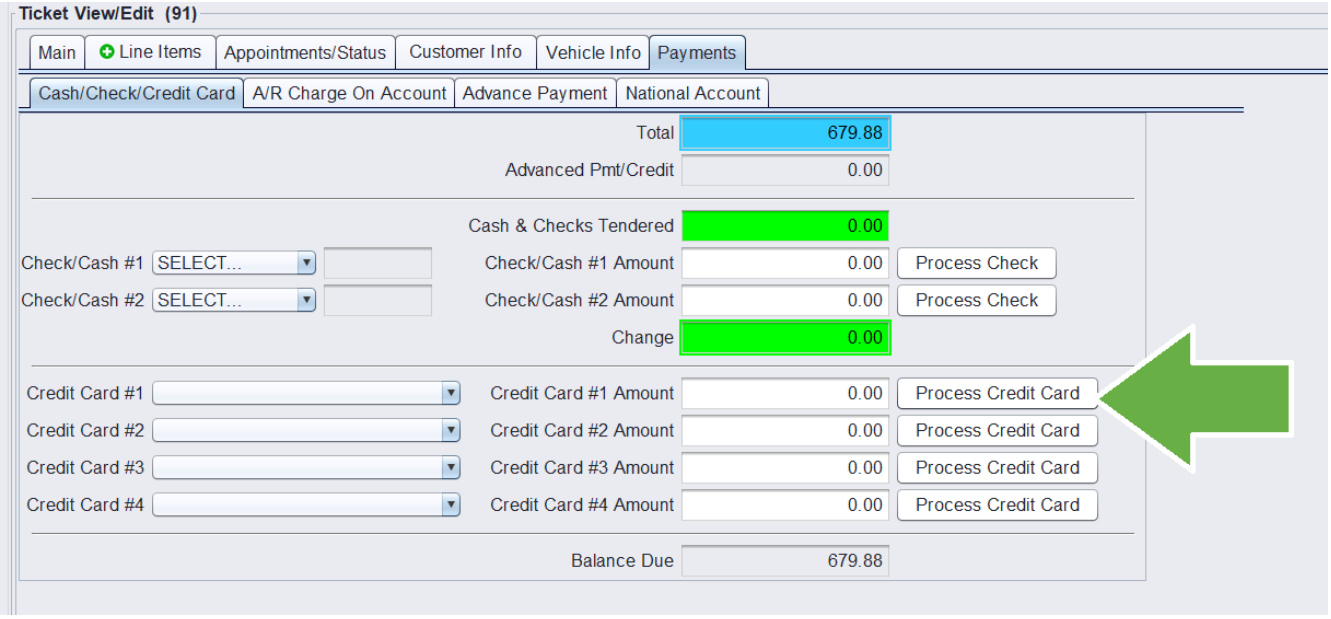
• Warranty Adjustment lines should be used when an item fails and is covered under the manufacturer's warranty. (I.E. Battery warranty, Road Hazard, Milage warranty)

m. First Mile/Paylink Payment Processing

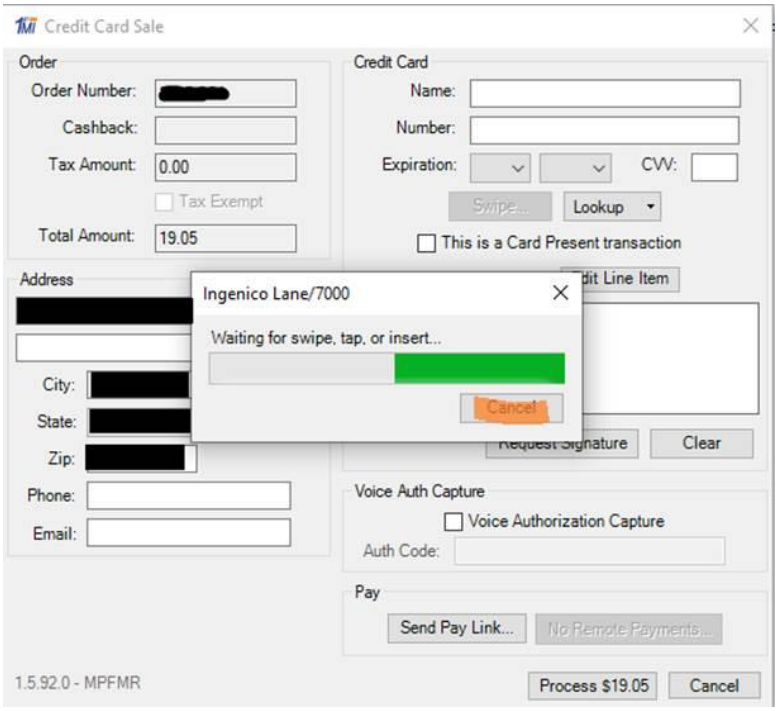
HITS integrated with First Mile payments processing.

There are multiple payments screens in the application; Workorder payment; Advance payment (deposit); and ROA payment.

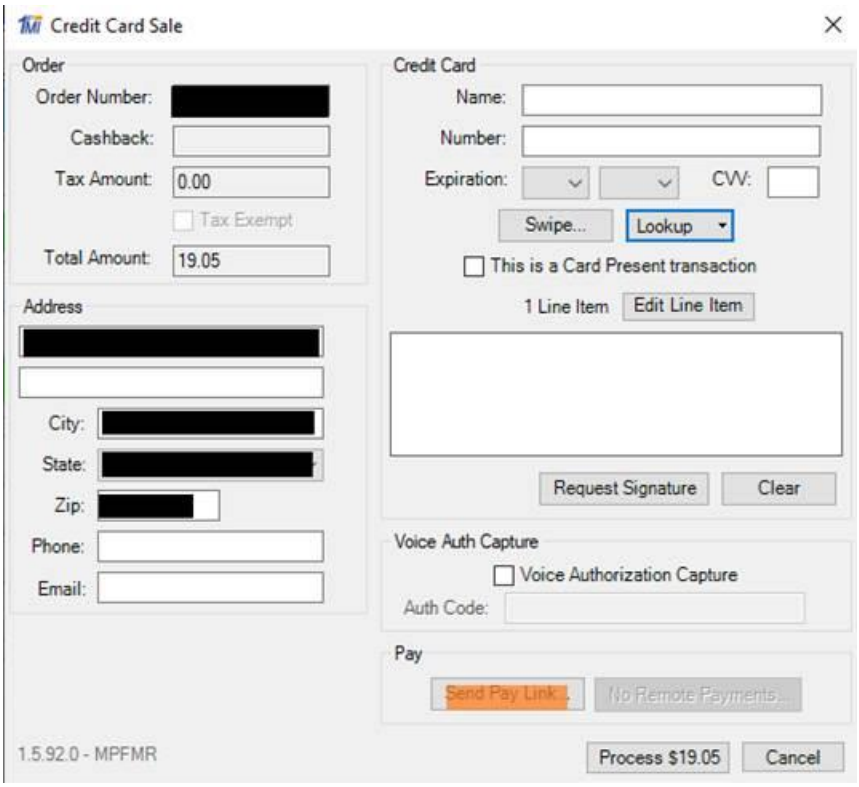
1. On the payment screens, click the **Process Credit Card** button to send the amount to the credit card machine to be processed.



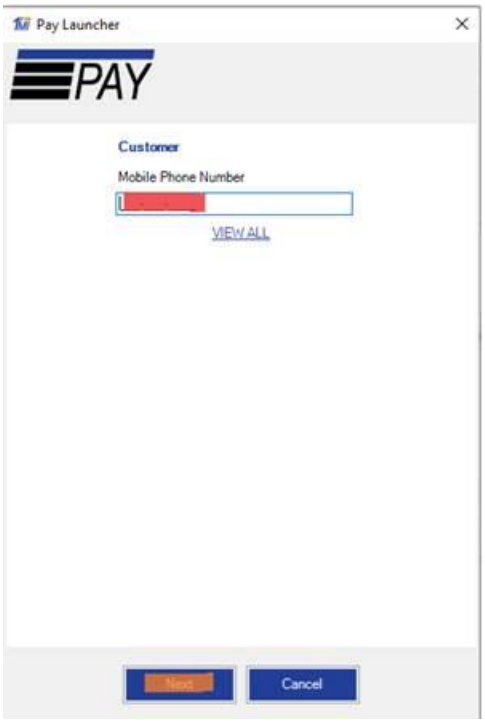
2. The primary screen where payments are processed will be from the **Payments** tab on the Workorder, shown above.
3. Cancel terminal input to continue to Pay Link



4. Send Pay Link

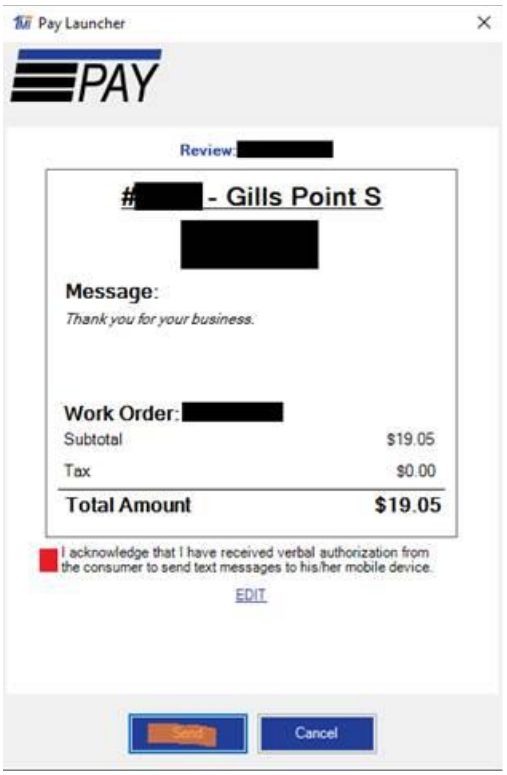


5. Enter customer phone number, Next.



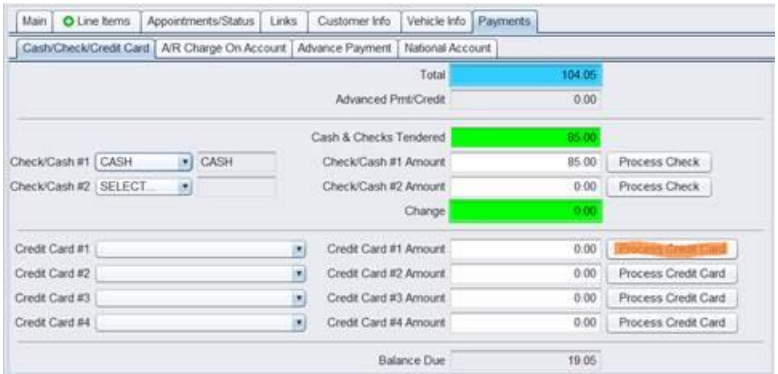
6. Enter customer name, Select message, Next.

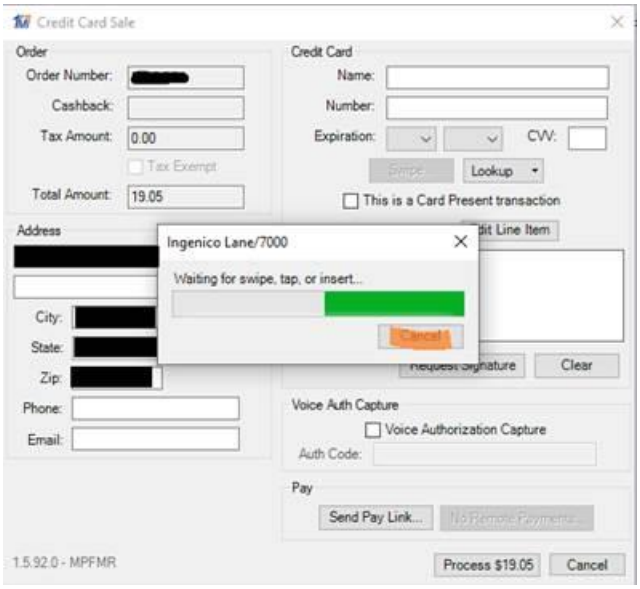
7. Click check box, Send



8. 1stMile will close and show an error in HITS, click OK

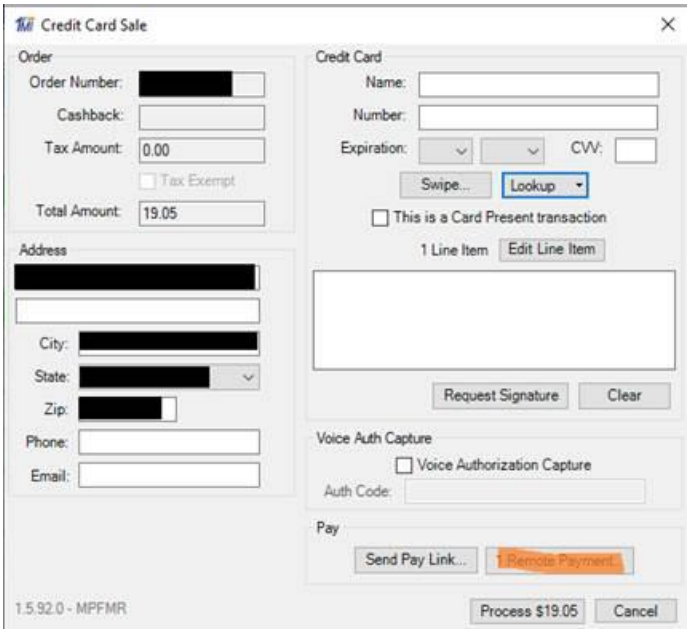
9. Repeat steps 1 & 2



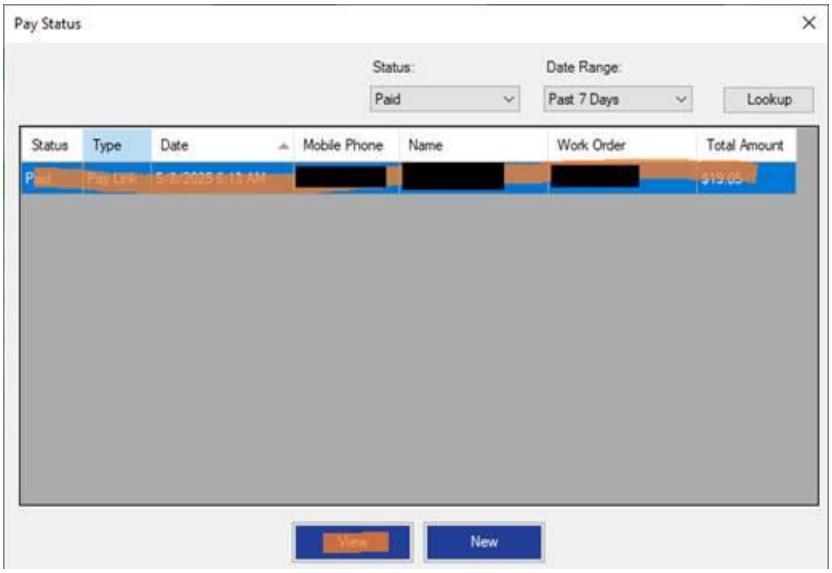


10. Click Remote Payment

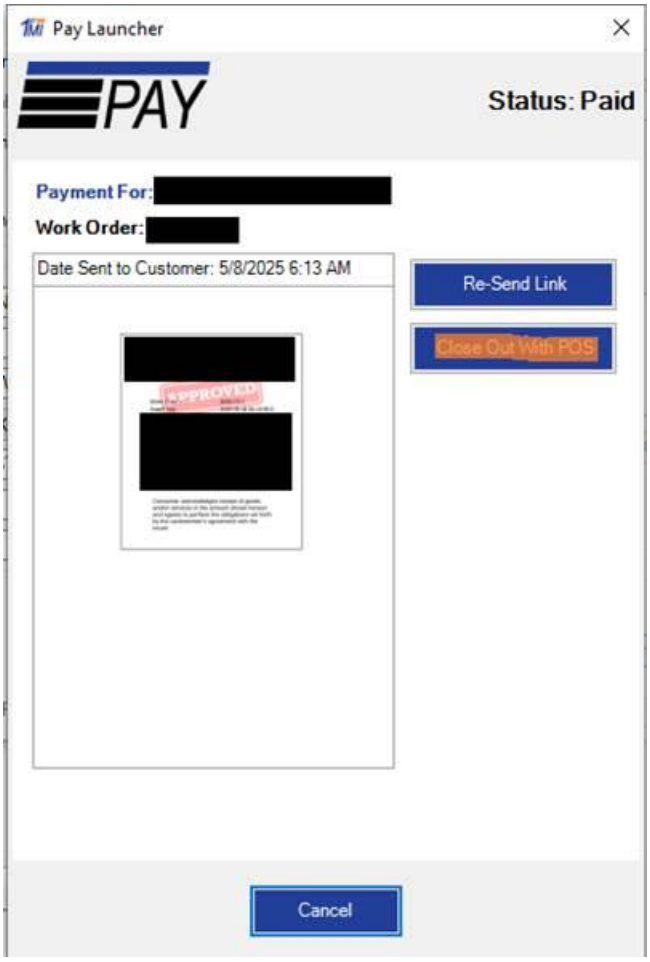
    Note: A number will indicate how many remote payments you have



11. Select the appropriate payment, View



12. Review the payment and click Close Out With POS



n. Cashing Out / Closing Invoice

When the customer comes to pick up their vehicle, we will want to ensure their invoice is ready to cash out to get them out of the door quickly.

When a Workorder is marked complete by the shop, it is important to ensure all the required information is entered on the ticket. This may include requirements such as:

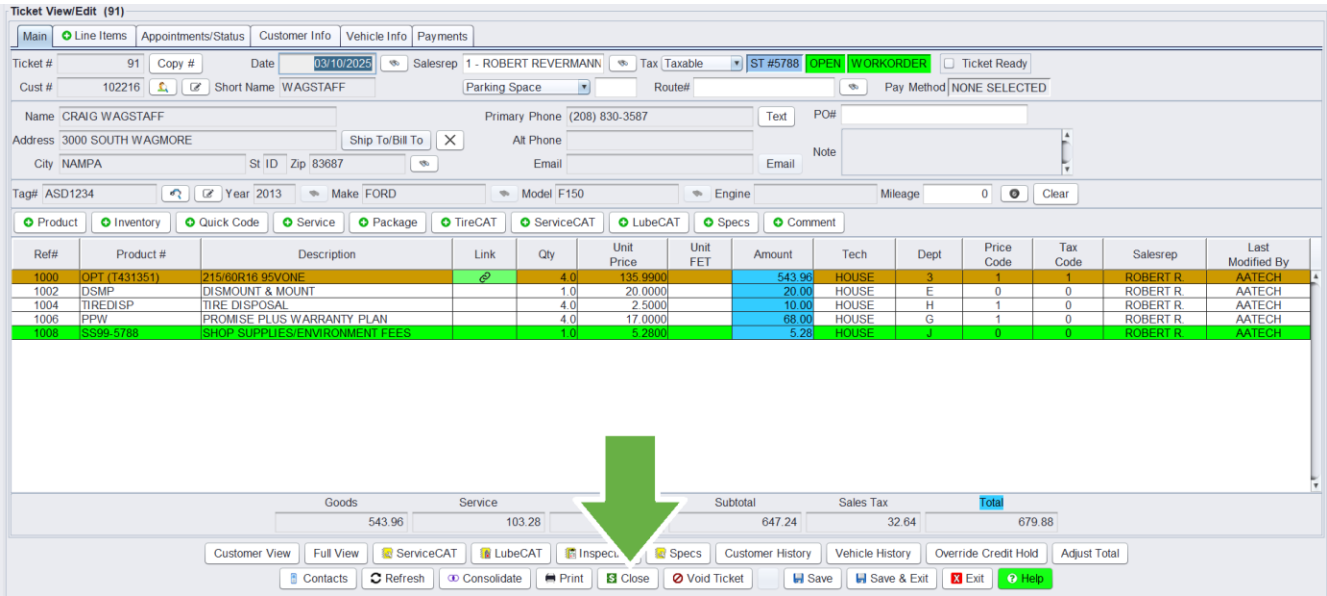
- Vehicle Mileage
- Entering vendor invoice #s for outside parts
- DOT# for tire installations

Or customer requirements such as:

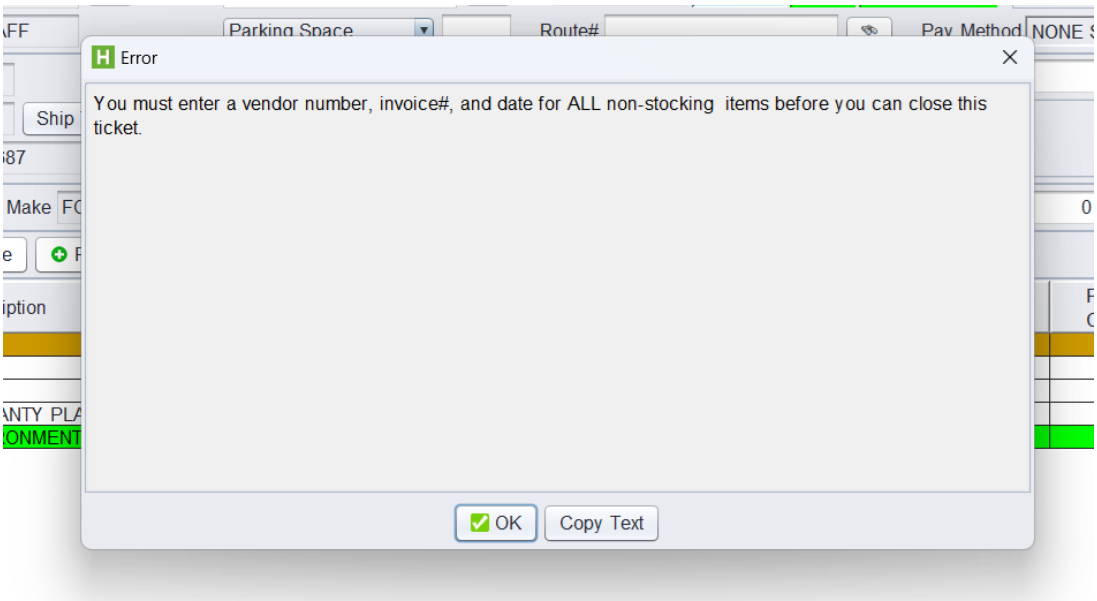
- PO# for commercial customers

- Customer address
- Customer's payment

At any time, we can click the **Close** button, and the system will show us what is remaining left to complete on the ticket.

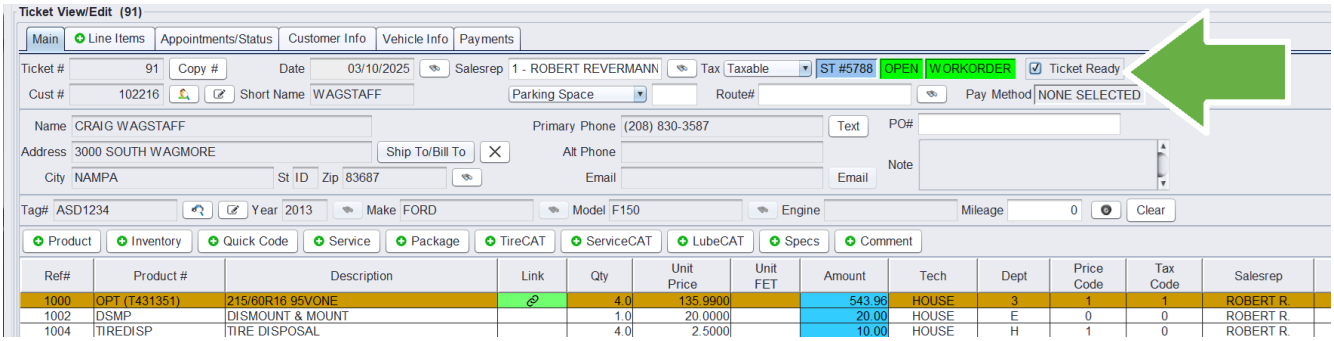


You may see a warning to clerical tasks to complete for the ticket

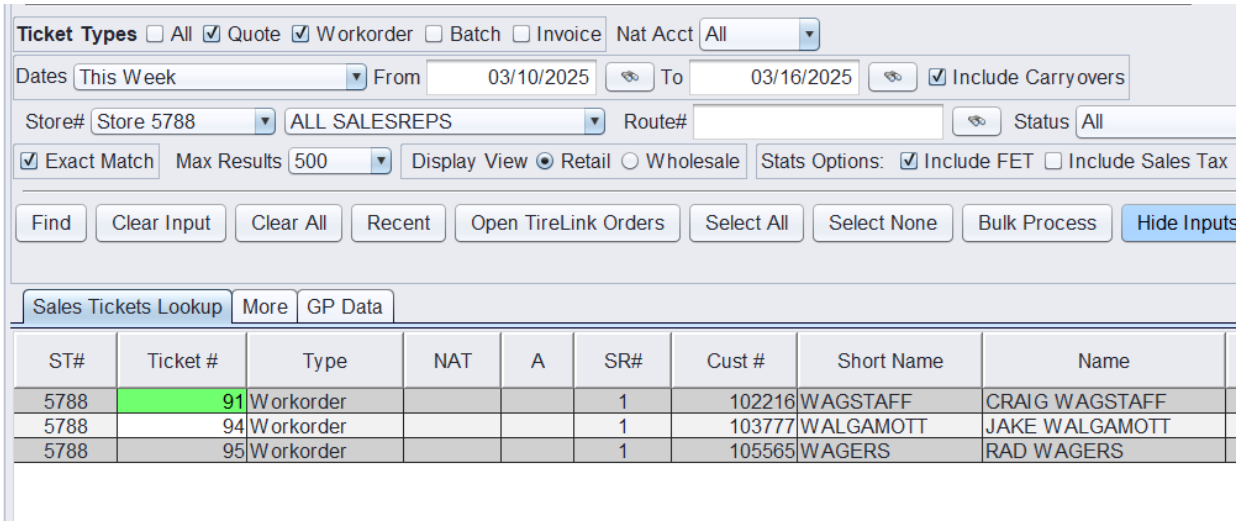


Once the ticket is ready to be closed, you can use the **Ticket Ready** checkbox to alert your team that the ticket is ready to be checked out.

(*This is not a requirement but can help the front counter stay organized*).



Tickets that are ready will show highlighted in green on the Ticket Lookup screen.



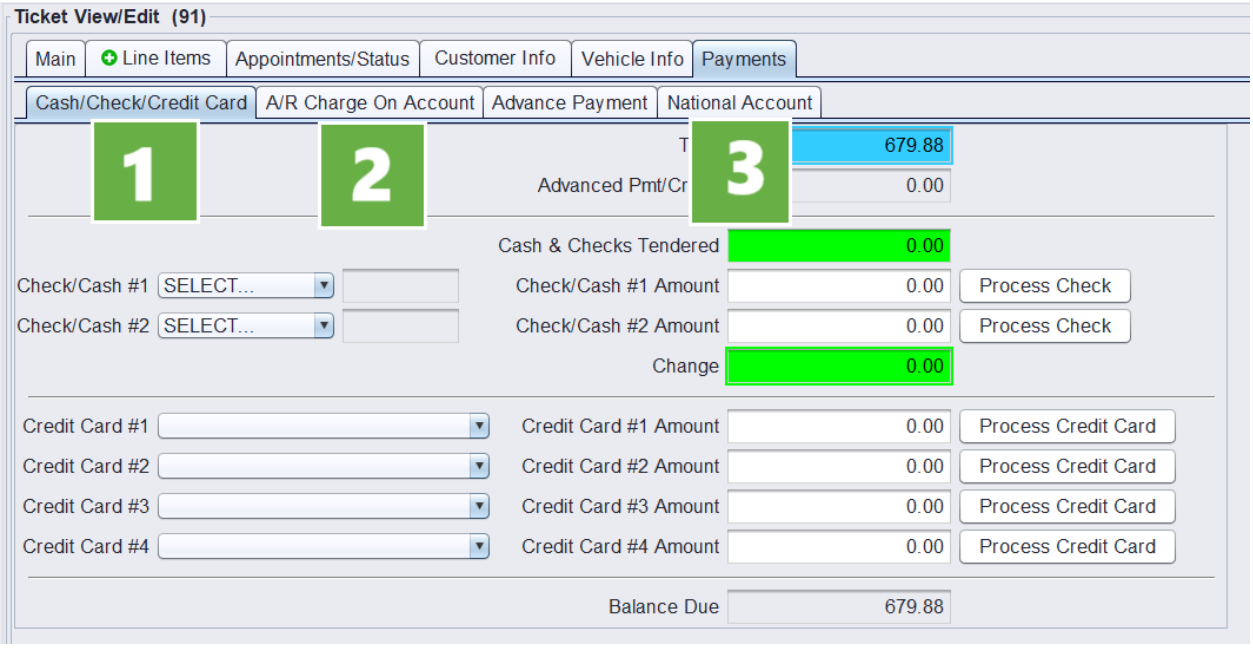
You can also toggle "Ticket Ready" status by right-clicking on the ticket.

To close the ticket, the balance due must be $0 or be applied to a valid A/R account. From the **Payments** tab:

[1] Process the customer's payment on the **Cash/Check/ Credit Card** tab

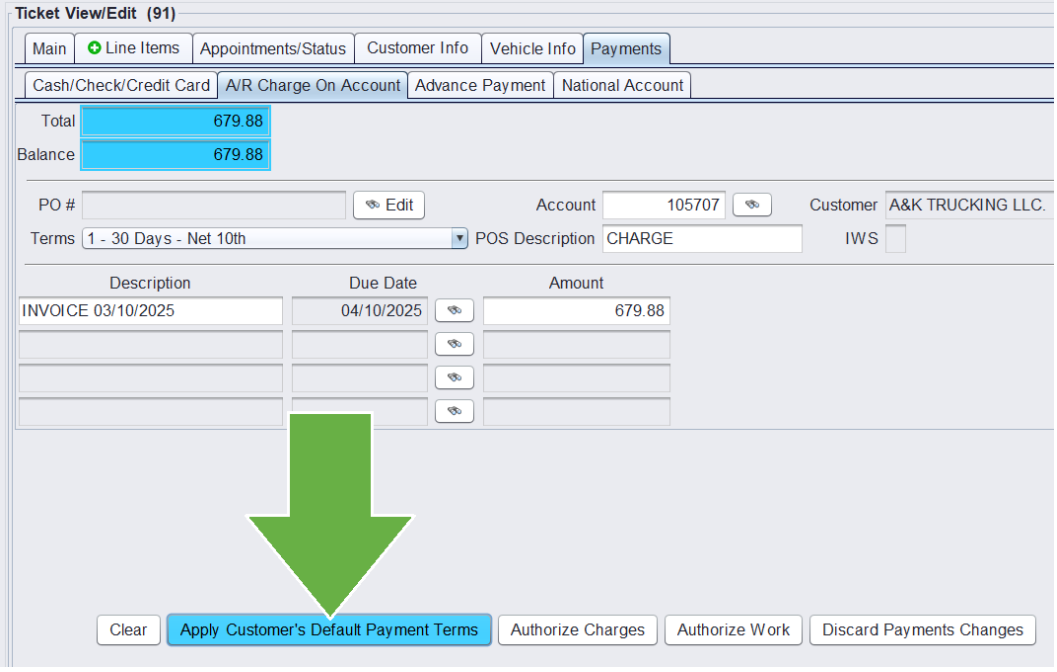
[2] Apply A/R Terms from the **A/R Charge On Account** tab

[3] Apply close to National Account on the **National Account** tab

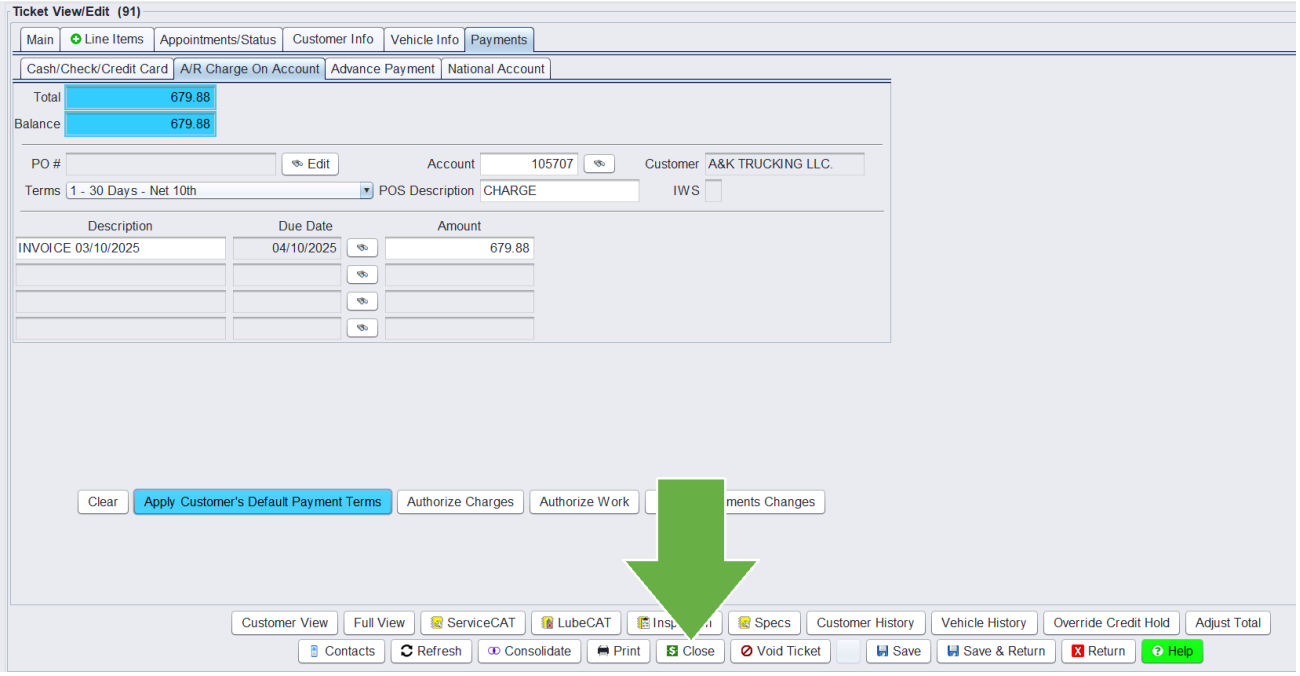


If the customer has an A/R account on file, the screen will default to the **AR Charge On Account** tab.

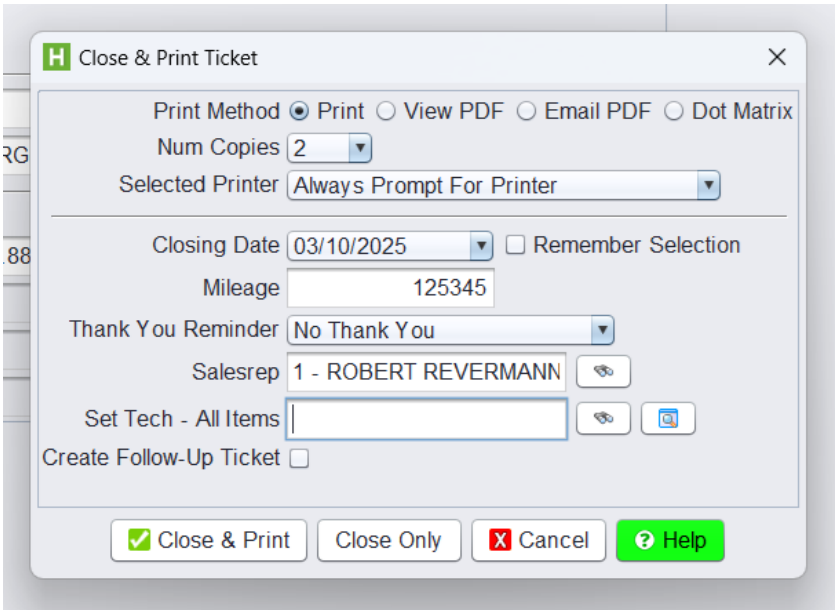
To close a payment to an A/R account, click the **Apply Customer's Default Payment Terms** button.



Once the customer's payment has been made or terms have been applied, click the **Close** button.



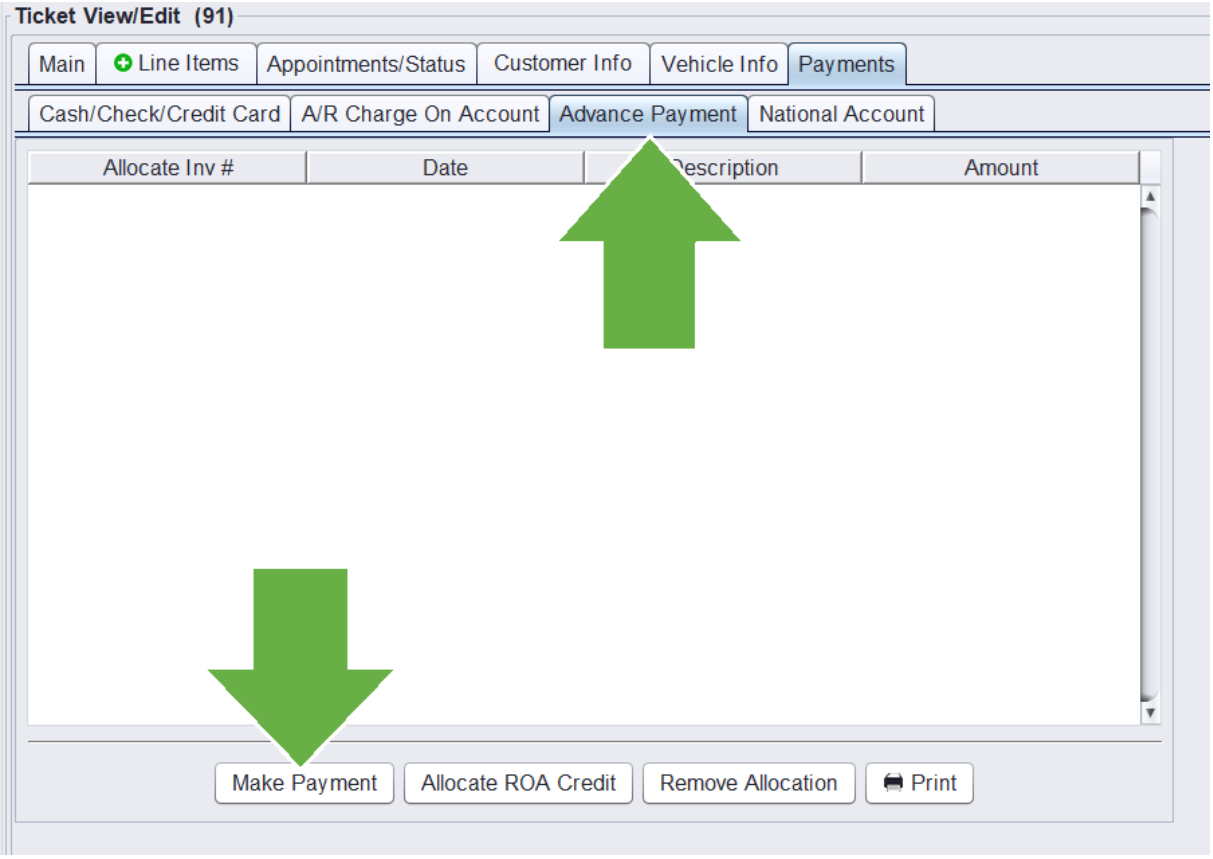
The close pop-up will prompt you to enter Mileage and Salesrep if you haven't already. Click **Close & Print** to print the Invoice or **Close** only.



o. Advance Payment / Deposit

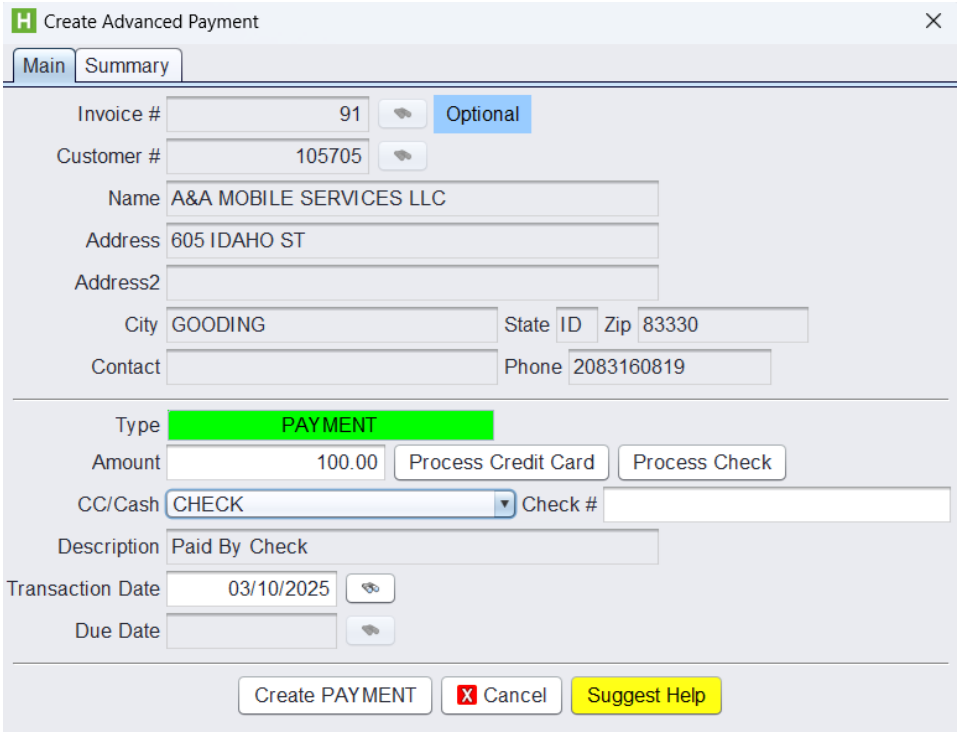
Customers can make one or multiple pre-payments/ deposits on a Workorder.

To post an advance payment/ deposit, from the **Payments** tab of the Workorder, click on the **Advance Payment** tab, and then Make Payment.



The Advance Payment pop-up will open allowing you to process a Cash, Check, Credit Card payment.

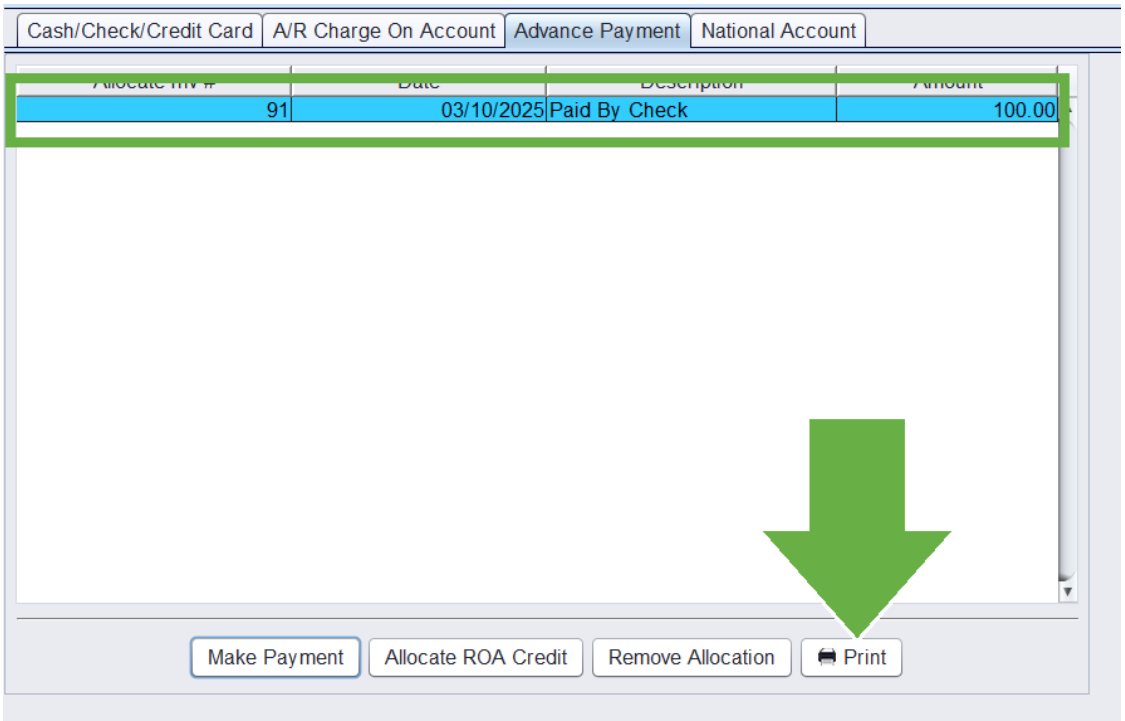
After entering/ processing the payment click **Create Payment**.



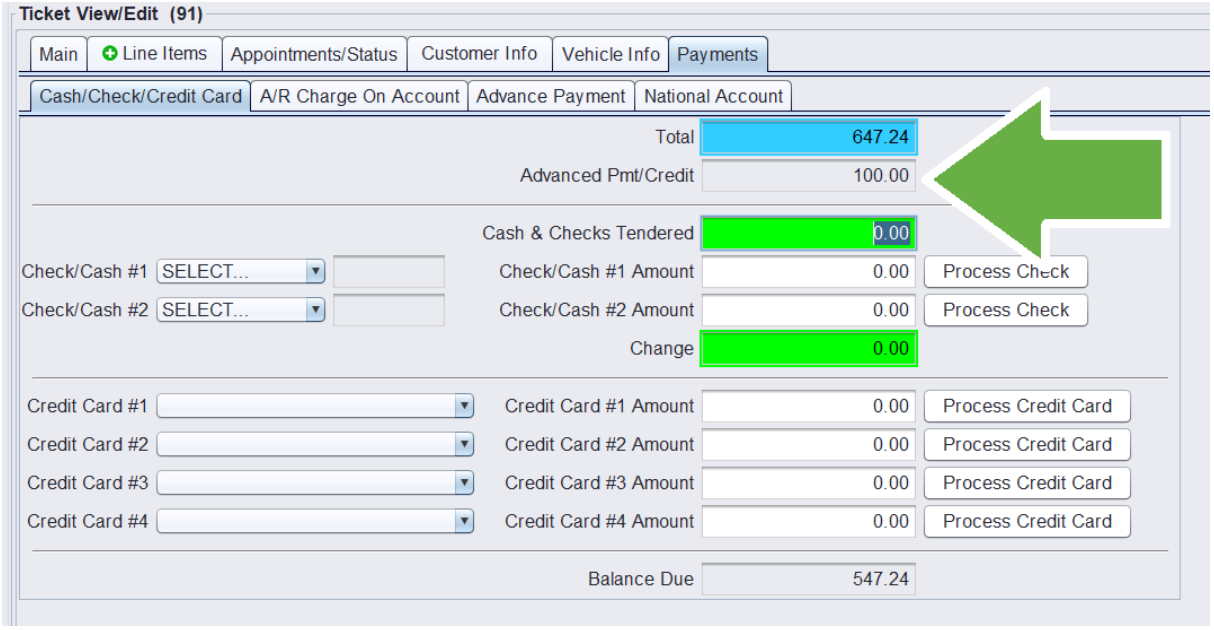
You may notice the Advance Payment looks similar to the ROA Payment, that is because Advance Payments actually flow through the Account Receivable system, giving retail customers the ability to carry a "credit only" balance while carrying Advance Payments on their account.

. . . . . .

All Advance Payments made by the customer will be shown in the table. You can click **Print** to print a payment receipt for the customer.



From the Payment, **Cash/ Check/ Credit Card** tab, you will see the total of any Advance Payments made, and the balance due will be reflected accordingly.



p. National Accounts

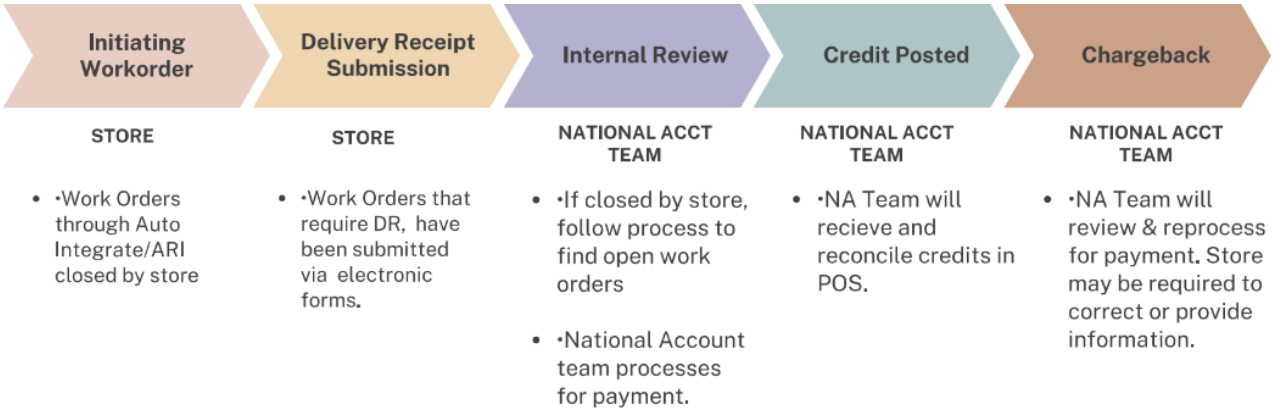
Customers who have a National Account will need to be properly set up with a National Account Ship To/Bill To.

Once they have been properly set up, the system will alert you that a customer has multiple Ship To / Bill To rules.

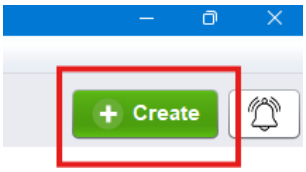
**Important*: If this is a work order for a fleet vehicle, please follow the appropriate billing procedure in the vendor portals such as Auto Integrate & ARI/Holman Partner Connect. Before billing the work order in HITS, please ensure you know the correct payment direction.

(*Example:* Enterprise Fleet approves work/PO through Auto Integrate portal.)

Billing Process Outline

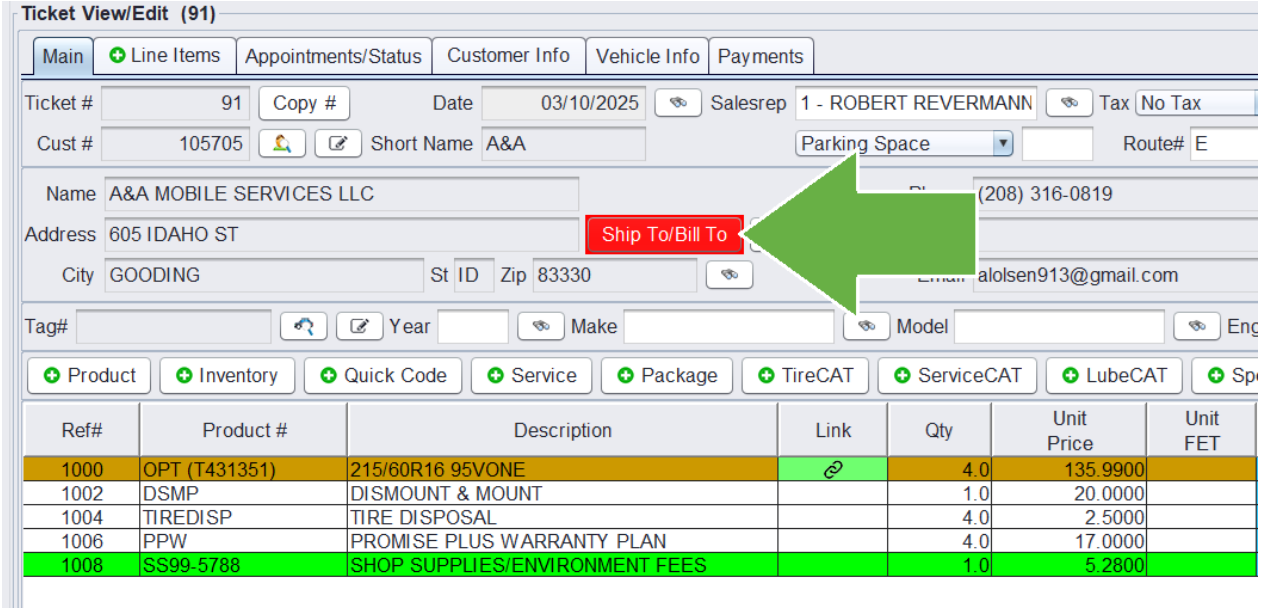


In HITS, Sales Counter view, select "+ Create" & create a new work order.



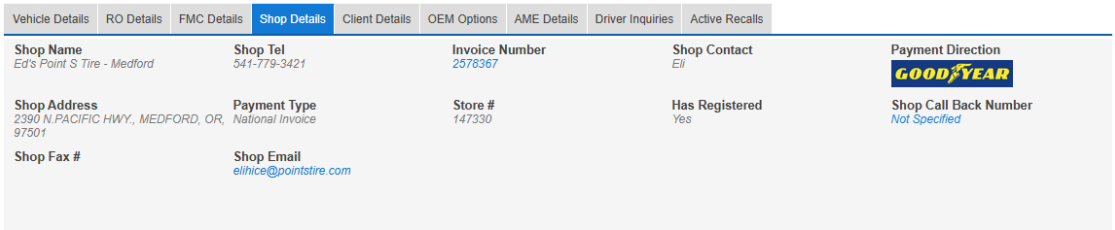
When prompted for customer information, please use the company who **owns** the vehicle (i.e. Element Fleet, BNSF, UPRR, etc.)

Click the **Ship To/ Bill To** button on the Main tab.



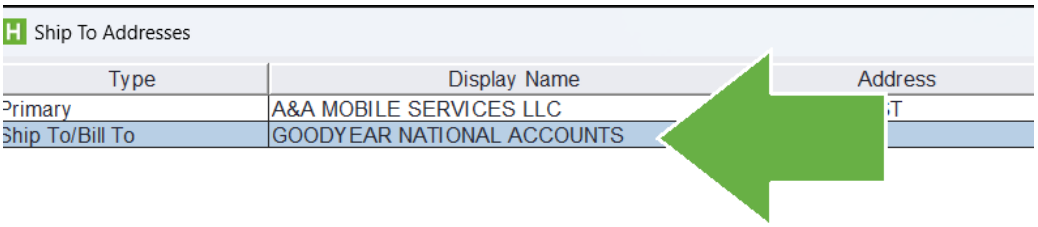
Make the appropriate selection.

If you are unsure of the payment direction, please refer to the client details in Auto Integrate. IF Preferred, this payment will be paid by ACH & should be charged to the AR account.



Pop-up window will appear, please select the correct billing “type”.

This will add line items to the work order specifying the billing type, utilize the “blank” line for any important billing notes.



Enter the vehicle information & purchase order number.

- ALL National Accounts require purchase orders to be paid for service. If purchase order requirements are unknown, please contact the fleet company or nationalaccounts@gillstire.com.
- The PO # is the salesman/stores responsibility. If the PO is not included when processing by the national accounts team, the store will be contacted to correct.

Navigate to add line items to the work order. All labor items will be entered using the specific "National Account...." Codes.

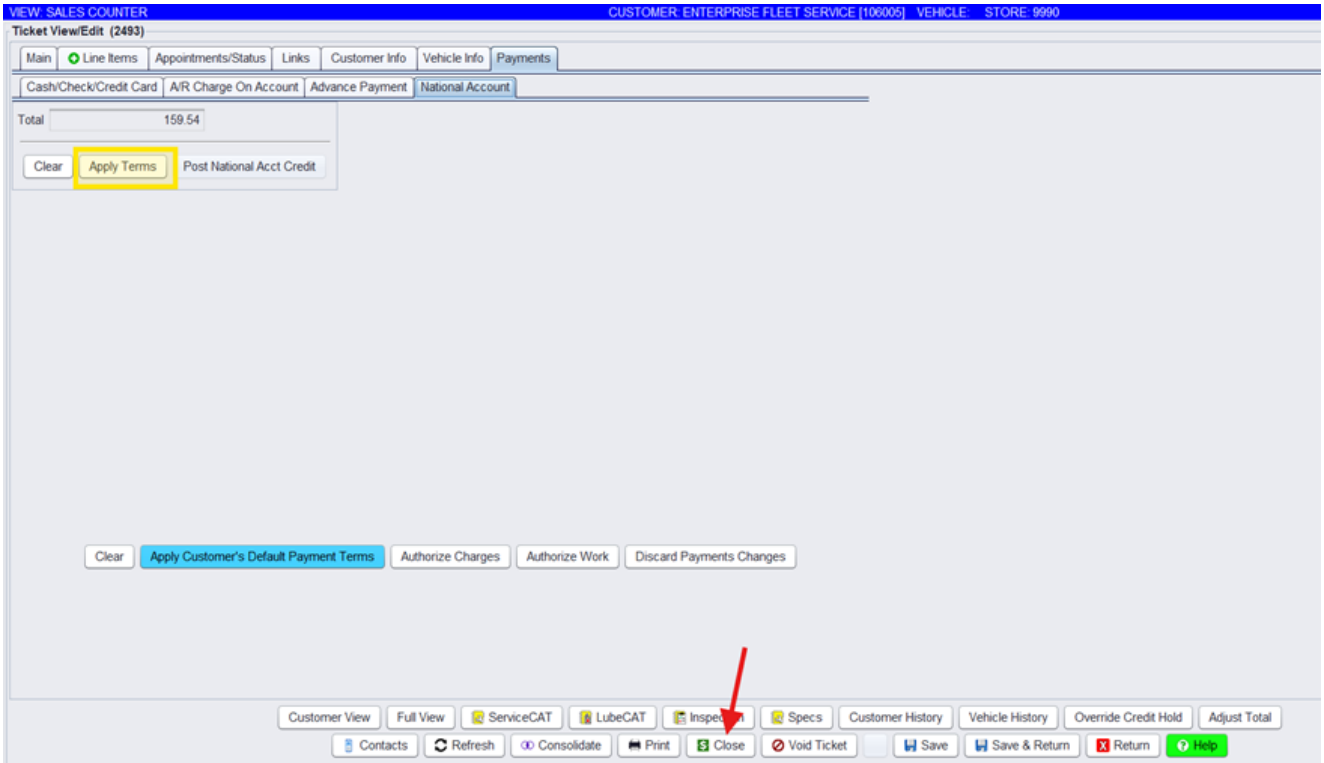
Product #	MFG	Size	Description	Qty St
NA-BD			NAT ACCT - BALANCE DIAGNOSTIC	
NA-BS			NAT ACCT - BALANCE STANDARD	
NA-CPT			NAT ACCT - COOLANT PRESSURE TEST	
NA-DIAGALI			NAT ACCT - ALIGNMENT DIAGNOSTIC	
NA-DIAGCOO			NAT ACCT - COOLANT SYSTEM DIAGNOSTIC	
NA-DIAGDRI			NAT ACCT - DRIVE TRAIN DIAGNOSTIC	
NA-DIAGELE			NAT ACCT - ELECTRICAL DIAGNOSTIC	
NA-DIAGENG			NAT ACCT - ENGINE DIAGNOSTIC	
NA-DIAGEXH			NAT ACCT - EXHAUST DIAGNOSTIC	
NA-DIAGSSP			NAT ACCT - STEERING AND SUSPENSION DIAG	
NA-DMLT			NAT ACCT - DISMOUNT & MOUNT - LIGHT TRUCK	
NA-DMP			NAT ACCT - DISMOUNT & MOUNT - PASSENGER	

If ARI or Auto Integrate are used, ensure the correct pricing is shown within the HITS workorder.

Once all items have been added, select the "payments" tab, select the "Apply Terms".

Select Close to close the work order.

The National Accounts team will process payment.



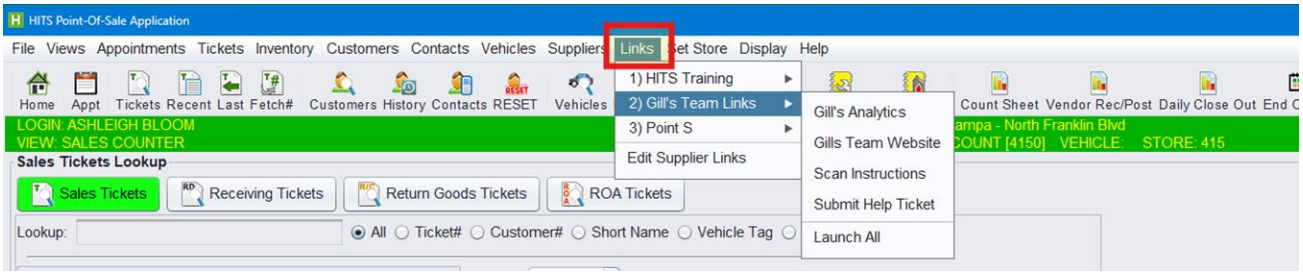
SOP – National Account Processing in HITS POS (w/ DR Requirement)

**Important*: For any commercial or "service call" work, and any purchases made through a government entity, must have a DR form filled out in entirety & provided to the National Account team for processing. Failure to submit a DR form will result in no payment being received.

(*Commercial fleet or service calls are for companies such as Amazon, Swift Leasing, Schneider Transport, etc.)*

(Government entities are specified on the Government DR Form. If you have any questions regarding government customers or billing, please contact our national accounts team for assistance.)

1. Submitting a DR form for National Accounts
    a. In HITS POS, the DR form is now electronic and can be accessed directly through HITS.
    b. Navigate to the HubSpot by following the process to Submit a Help Ticket.

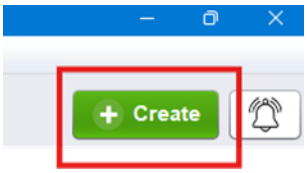


c. Fill out the electronic delivery receipt form in entirety.

   i. Failure to have the requested information when submitted will result in it being returned to correct.

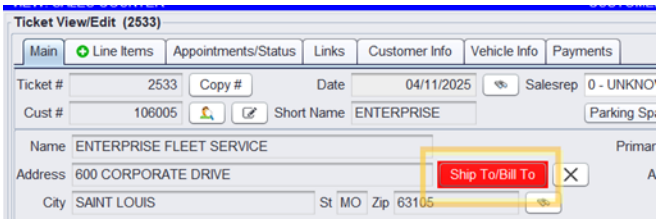
d. Once the form has been submitted, return the HITS POS.

2. In HITS, Sales Counter view, select "+ Create" & create a new work order.

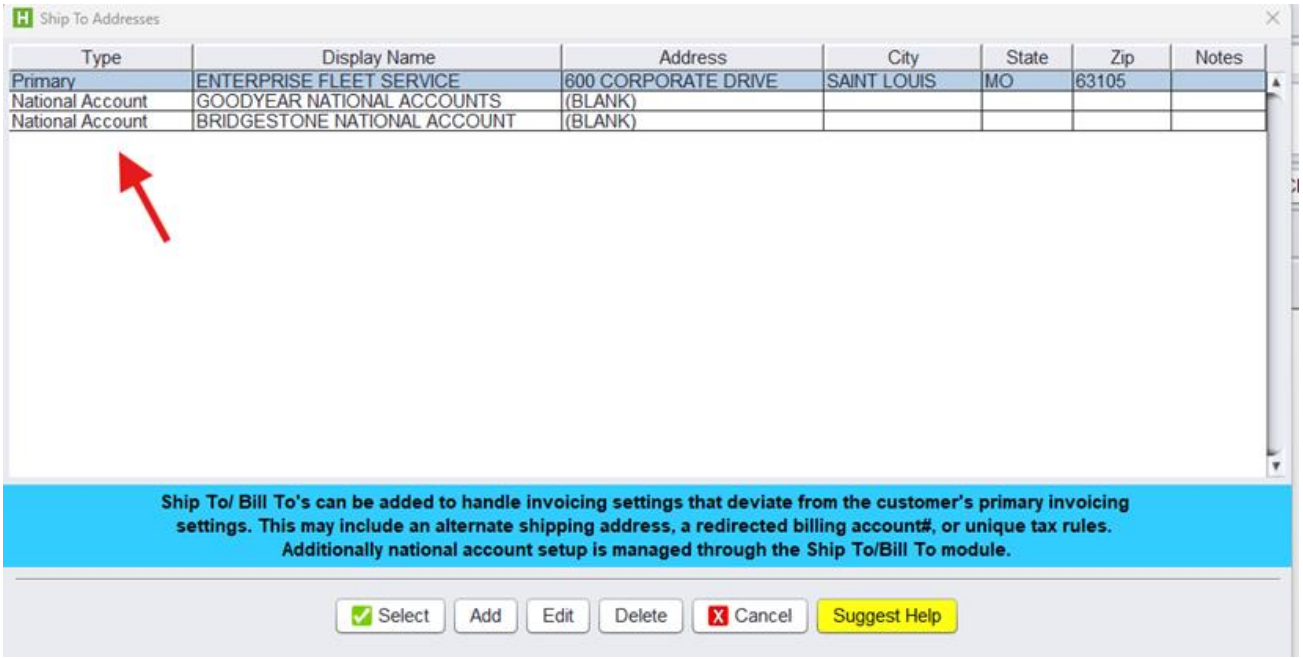


3. When prompted for customer information, please use the company who owns the vehicle.

4. Once the customer is selected, select the red "Ship To/Bill To" button to select the national account bill to.



a. Pop-up window will appear, please select the correct billing "type".



b. This will add line items to the work order specifying the billing type, utilize the “blank” line for any important billing notes.

5. Enter the vehicle information & purchase order number.
    a. ALL National Accounts require purchase orders to be paid for service. If purchase order requirements are unknown, please contact the fleet company or nationalaccounts@gillstire.com.
    b. The PO # is the salesman/stores responsibility. If the PO is not included when processing by the national accounts team, the store will be contacted to correct.

6. Navigate to add line items to the work order. *Using NA labor codes if needed.
    a. Please add all items to the work order, ensure all items added were also on the DR form when submitted.

7. Once all items have been added, DO NOT CLOSE the work order.

a. The National Accounts Team will receive the DR and process payment within 24-48 hours.

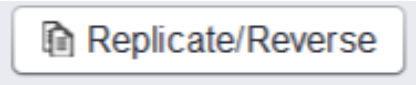
8. The National Accounts Team will verify and close the work order once processed for payment.

6. Refunds and other ticket functions

A few additional invoicing functions will be detailed in this section.

Replicate / Reverse (Refunds)

On the Main tab of the ticket (bottom of the screen) is the **Replicate / Reverse** button. This button can be used to replicate an invoice or reverse an invoice.



A reversed invoice would most often be used for a **refund**. If the customer qualifies for a refund, **reverse** the original invoice. This will turn all quantities on the ticket to negative. Tender the payment as you would for the reverse amount. If processing credit card, follow the normal process to Process Credit Card which will put the credited charge on the customer's credit card.

Tire Connect Refunds

As a reminder, we have a **no-refund policy for deposits** on Tire Connect orders. However, we recognize that certain situations may necessitate exceptions. In those rare cases, follow these steps:

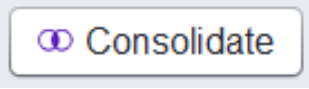
1. **Apply Deposits to Alternative Options First**:
    - Before considering a refund, attempt to apply the deposit to another order, such as a different set of tires or services offered by the store.

- If this is not feasible, assess whether a restocking fee is necessary (e.g., for special-order items that cannot be returned to the supplier).

2. **Store Manager Approval**:
   - Refund requests must be approved by the store manager before proceeding.
   - Approval can be given verbally or via email.
3. **Refunding the Deposit**:
   - Obtain the customer name, work order number, the reason for the refund, and the **amount to be refunded** (if the full deposit is not being refunded, specify what was applied to other charges such as a restocking fee).
   - Inform the customer that the refund will be processed by our corporate team and they will receive a receipt via email once completed.
   - The store manager must email Amy Robertson with the following details:
     - Customer name
     - Work order number
     - Refund amount
     - Reason for refund
4. **Corporate Processing**:
   - Amy will process the refund and email a receipt to both the customer and the store manager for records.

Consolidate

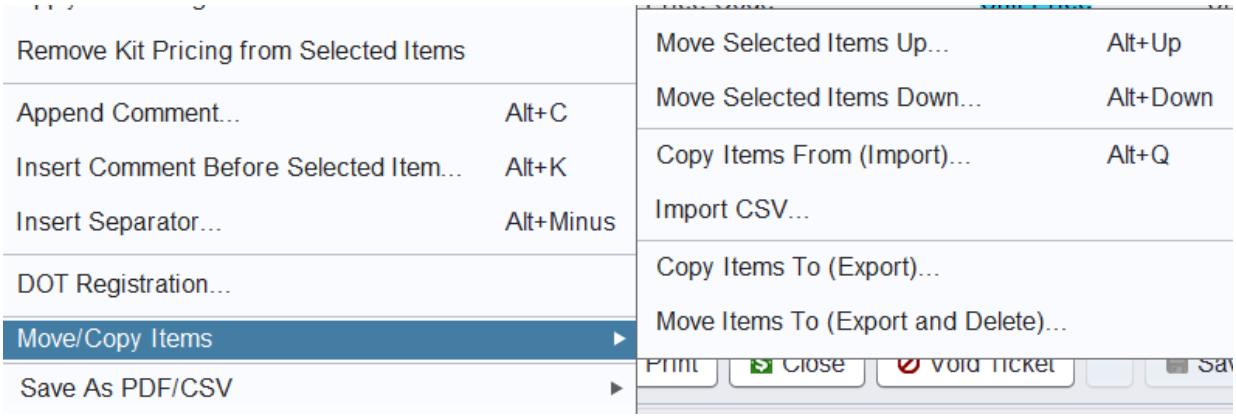
There may be cases for **Consolidate** customer's Quotes and Workorders. If the customer has multiple tickets, click the Consolidate button (button of the screen on the Main tab) to see tickets that are eligible for consolidation.



Highlight the tickets to consolidate and click the **Consolidate** button. All items will be merged onto one ticket.

Move Line Items To/ From tickets

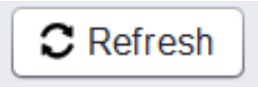
From the right-click menu on the Line Items tab is the ability to Copy Line From (Import) or Copy To (Export) another ticket.



Refresh

Occasionally you may receive a message that the ticket you are working on has become “Stale”. This means someone else is working on this ticket and has made edits.

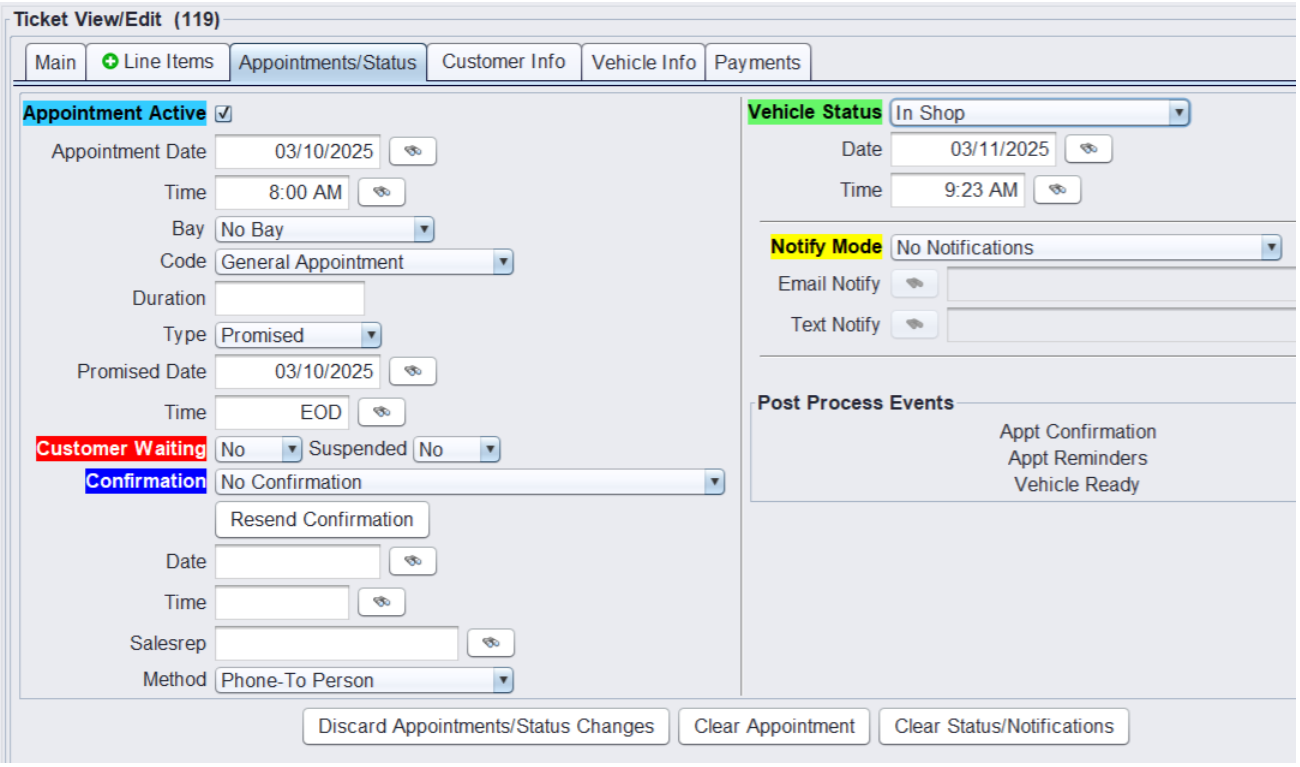
Click **Refresh** to see the most recent version of the ticket.



7. Appointments (and Autoflow appointment integration)

HITS tracks appointments and bay/ technician resources.

From the **Appointment/ Status** tab of the ticket, an appointment type, duration, and bay can be set.

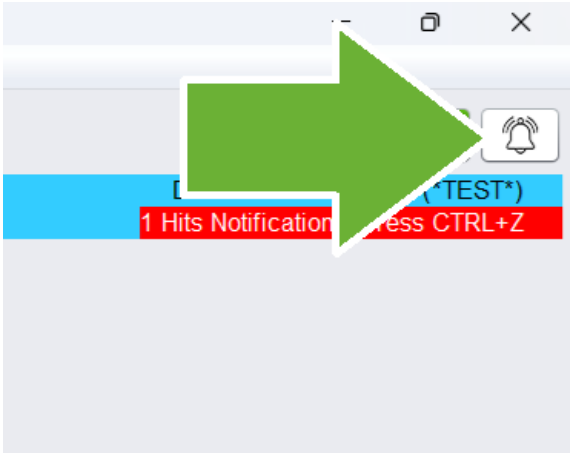


Important! In HITS, each appointment will need to be linked to a ticket (either a Quote or Workorder). There cannot be an appointment in HITS that is not linked to a ticket.

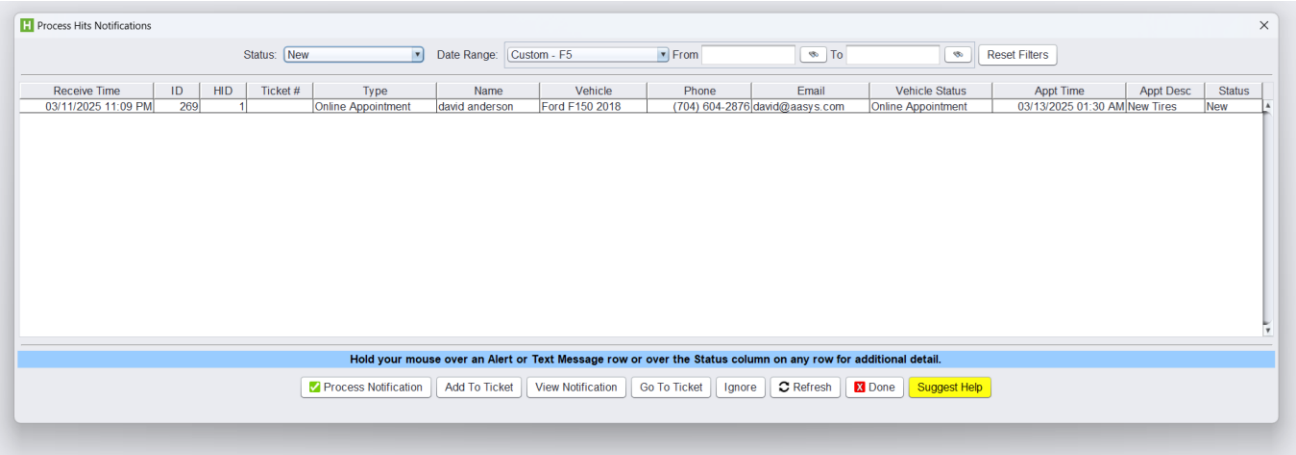
Consider Quotes will not allocate inventory and parts cannot be ordered from Quotes. Typically Quotes are the better ticket type to use for appointments set one-two weeks in the future, but if inventory needs to be allocated or parts ordered for the appointment, a Workorder is the best ticket type to use for the appointment.

Appointments made online (via Autoflow) will flow into HITS.

There will be a notification in the upper-right had corner to alert of new notifications. Click the **notification icon** to view new appointment requests (and other notifications).



Click on the notification to process the notification.



Clicking on this notification will create a **new ticket** for the requested appointment time in HITS.

If the customer and vehicle that have booked the appointment already exist in the system, the existing customer and vehicle record will be added onto the ticket. If the customer and vehicle are new, you will need to be added into the system like any other new customer/ vehicle.

8. Digital Inspections (by Autoflow)

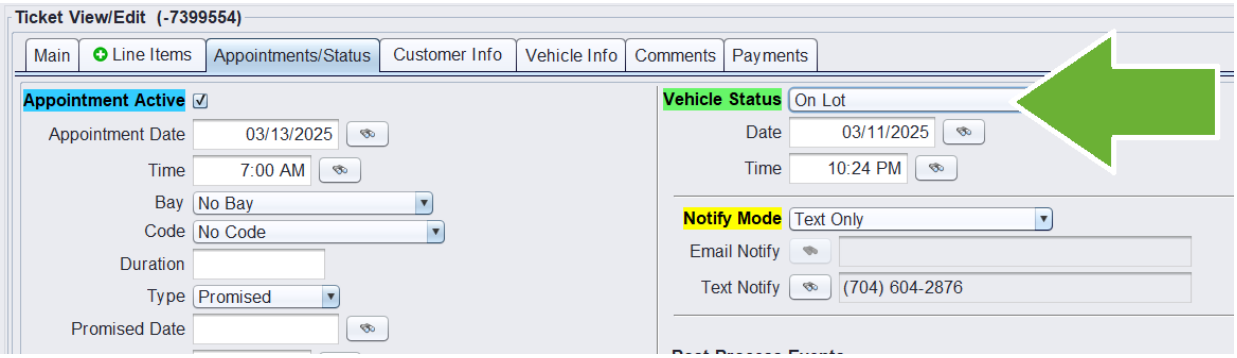
Workorders in HITS will flow automatically to the Autoflow board with the customer, vehicle, and vehicle status.

Important! For Workorders to be sent to Autoflow, a vehicle with license plate AND vehicle status must exist on the Workorder.

To set vehicle status, go the **Appointment/ Status** tab and set the vehicle status. Select the appropriate vehicle status and click **Save**.

You should be setting status on every work order any time you make a new one. The benefit to this is that when you sort your open work orders by status, you can easily see what is ready to be cashed out, waiting for a call back from the customer, waiting for parts etc...

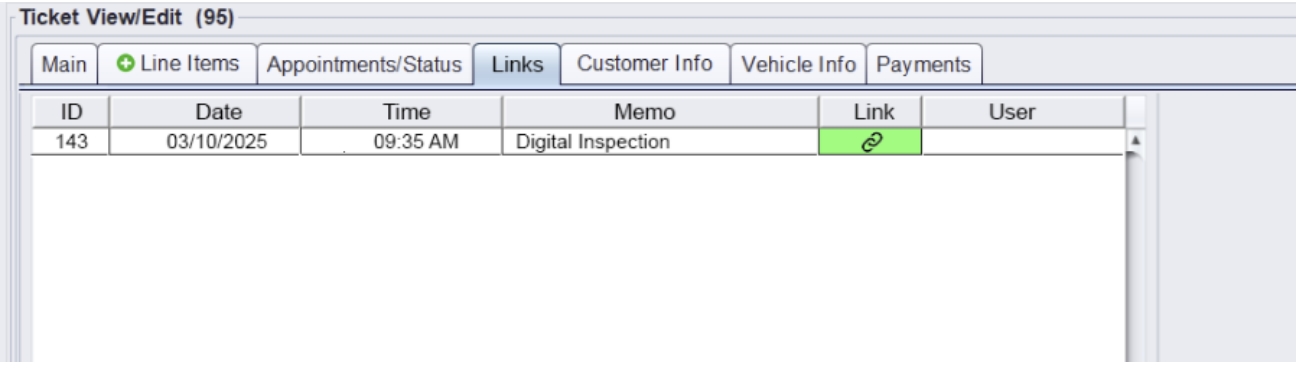
Model	Vehicle Status	Date
FOCUS	Ready	11/18/2025
FORESTER	Ready	11/18/2025
WRANGLERUNLIMITED	Ready	09/02/2025
MAVERICK	Ready	09/16/2025
	Ready	10/07/2025
	Ready	11/10/2025
ELANTRA	On Lot	11/18/2025
CR-V	On Lot	11/18/2025
ATLAS	On Lot	11/18/2025
TUNDRA	On Lot	09/17/2025
	On Lot	10/16/2025
	On Lot	10/29/2025
TIGUAN	On Lot	11/10/2025
NEON	On Lot	11/11/2025
	On Lot	11/12/2025
TACOMA	On Lot	11/12/2025
C300	On Lot	11/14/2025
FIT	On Lot	11/17/2025
	Not Here Yet	11/18/2025
	Not Here Yet	11/18/2025



Updates made in Autoflow will sync back into the HITS for vehicle status and digital inspections created.

Digital inspections linked to a ticket will be displayed on the **Links** tab on the ticket.

Click the **link icon** to access the inspection in Autoflow.



9. Receiving & Expenses

In HITS, stocking inventory, nonstock inventory, and expenses for vendors on account will need to be posted. Below is a quick guide for posting vendor receipts by type. More information for each type will be detailed below.

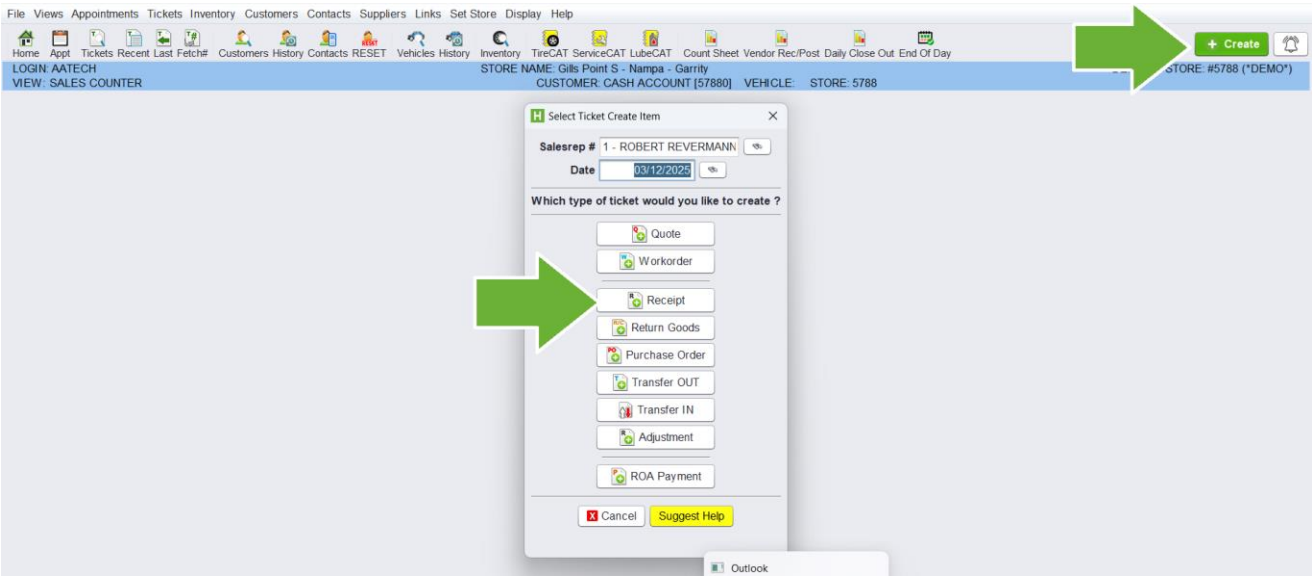
Type	Description	How To in HITS
Inventory products	Stocking inventory for which there is a unique product number (ie. 176236NXK)	**Create** > **Receipt** > Add product #, Qty, and Cost
Nonstock products	Nonstock product purchased for a customer's workorder (ie. OPP, OPT, OPW, etc.)	**Add to Workorder** with Vendor Invoice #. Receipt will be posted at Invoice close. Can be posted prior if necessary.
Expenses	Ongoing expenses for vendors that invoice the shop (ie. laundry services)	**Create** > **Receipt** > type **"X"** in the product code field, click **Function (fn), 4**, then select correct expense code
BREX Expenses	One-time expenses charged to BREX	Only add to HITS if purchase is for a customer's Workorder, **Add to Workorder** with BREX as vendor.

		In the Brex app: - check the Work Order checkbox - do NOT enter a GL account - in the Memo field, type "COGS"

a. Inventory Receipts

When receiving stocking items from a supplier, these receipts to inventory will need to be posted into the system.

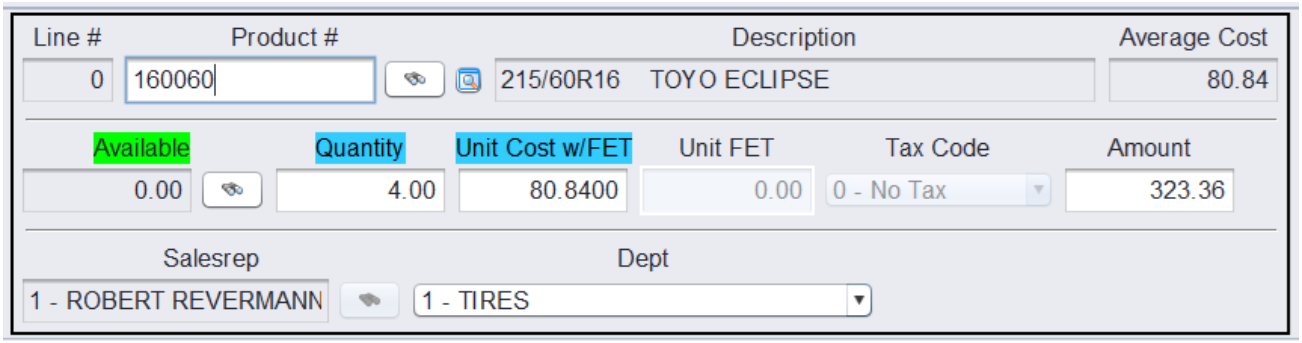
To receive inventory, click the **Create** button, then **Receipt**.



The system will prompt you to select the vendor you are receiving product from. Click **Select Vendor/ Store** and proceed to search for and add the correct vendor to the Receipt.

Next, click **+ Product** to add items by product number.

You can use your keyboard to batch entry items on your vendor invoice #, entering through all items.



After entering all items with correct cost on the Receipt, click the **Payments** tab.

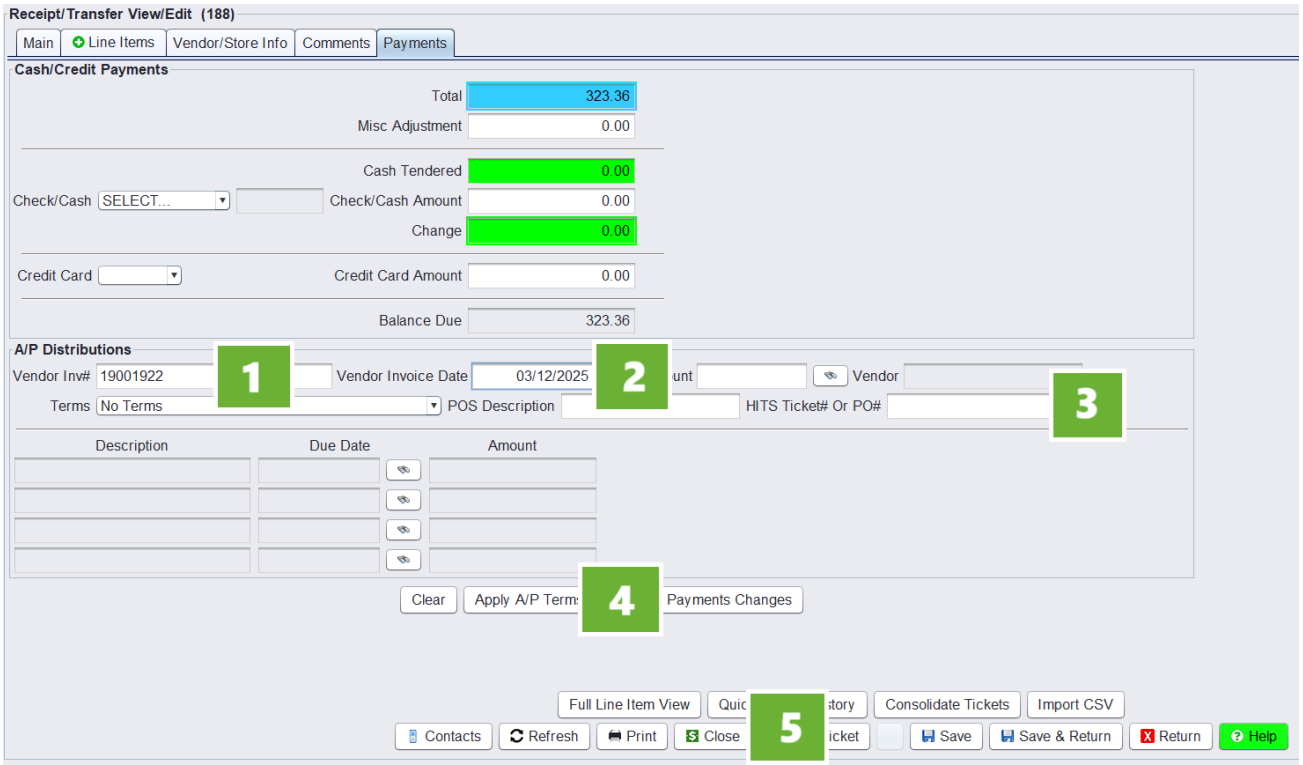
[1] Enter the **Vendor Invoice #**

[2] Tab or Enter over to fill in the Vendor Invoice Date

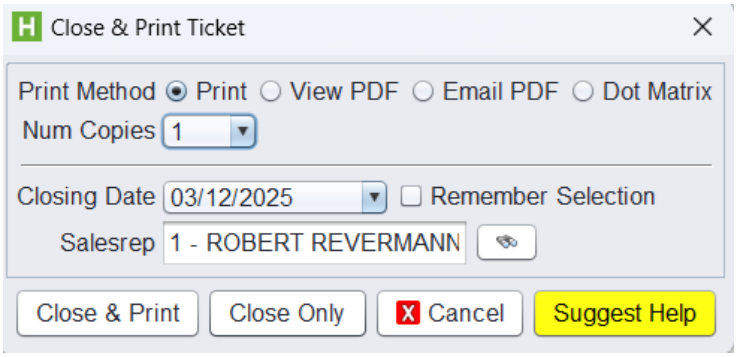
[3] (If applicable) enter the HITS Ticket # or PO# the purchase is for

[4] Click **Apply A/P Terms**

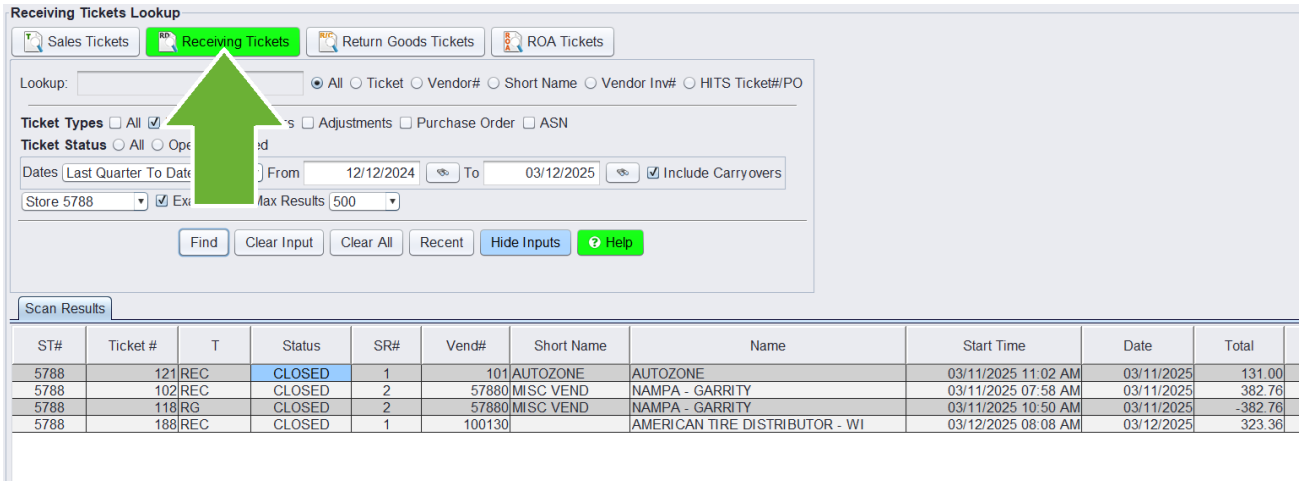
[5] Click **Close** to finalize the Receipt, follow prompt to close



Click **Close** to finalize the Receipt



All Receipts in HITS for inventory, nonstock, and expenses can be seen from the **Receiving Ticket Lookup** screen, found via the **Home** button.

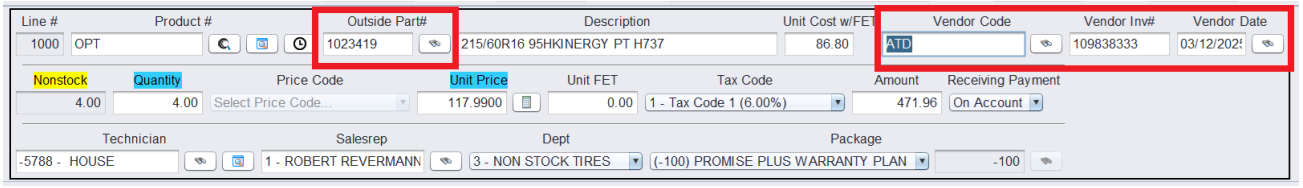


b. Nonstock (Outside Part) Receipts

Nonstock parts in HITS often start with “OP” for “Outside Purchase”

OPT (Outside Purchase Tire); OPP Outside Purchase Part, OPW Outside Purchase Wheel, are some examples.

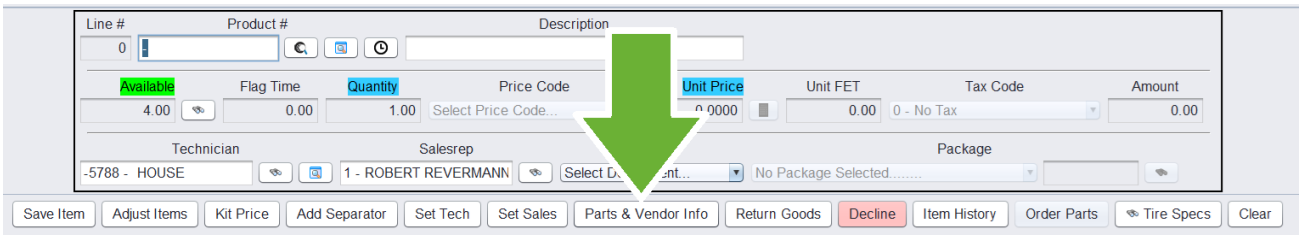
For nonstock parts added to customer Workorders, the system will **require** that Vendor; Outside Part #; Vendor Invoice #; Vendor Date be added to the Workorder before the Workorder can be closed.



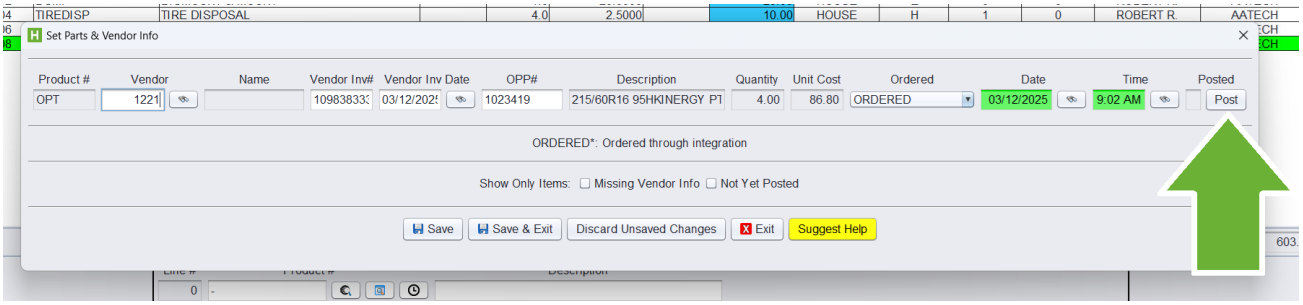
Upon finalizing the invoice at the end of the day all Nonstock part on (Batch) Invoices will be posted as received.

If it is required to post nonstock parts prior to the tickets being finalized, this can be done from the Workorder itself (or from the Vendor Reconciliation screen).

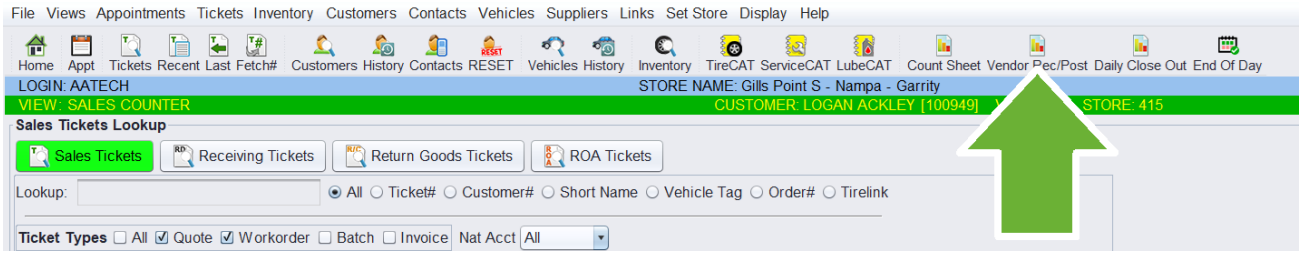
From the Workorder, click the **Parts & Vendor Info** button

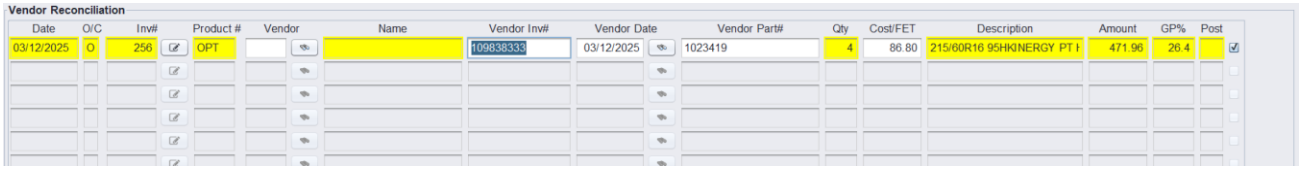


From the **Parts & Vendor Info** screen, you can click the **Post** button to post parts as received on Open Workorders which will create the Receipt for the part at the time you click the button as opposed when the Invoices is finalized.



You can also manage your nonstock parts from the **Vendor Reconciliation** screen which will show all nonstock parts on all of your Workorder and Batch Invoices, allowing you verify information is correct without needing to open each Workorder.

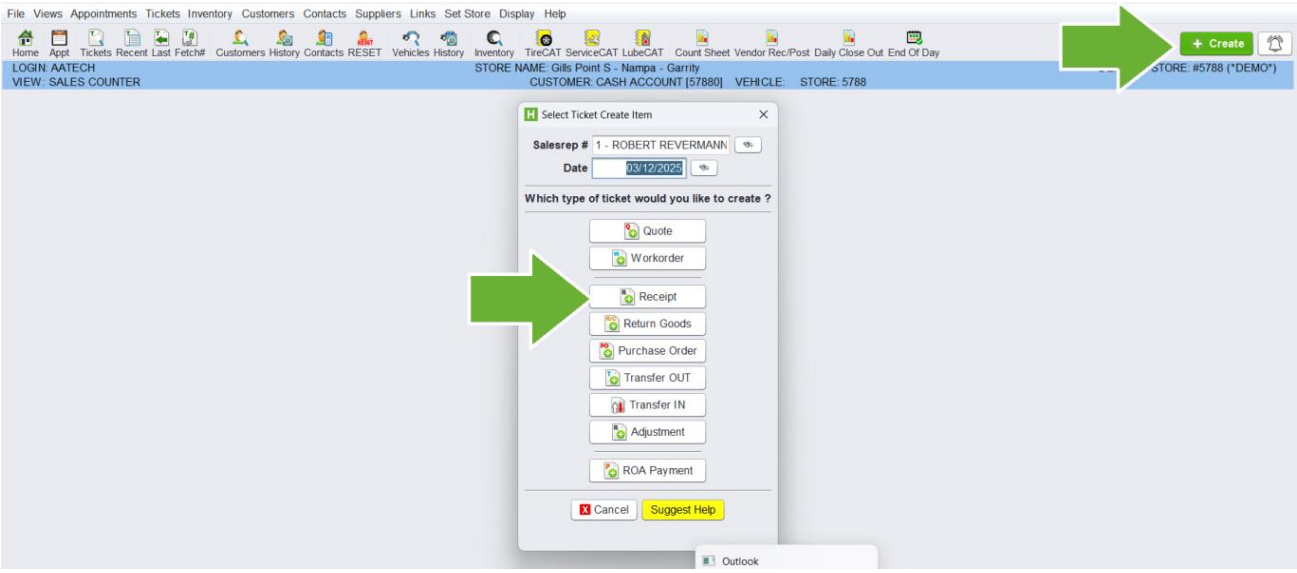




c. Posting Expenses

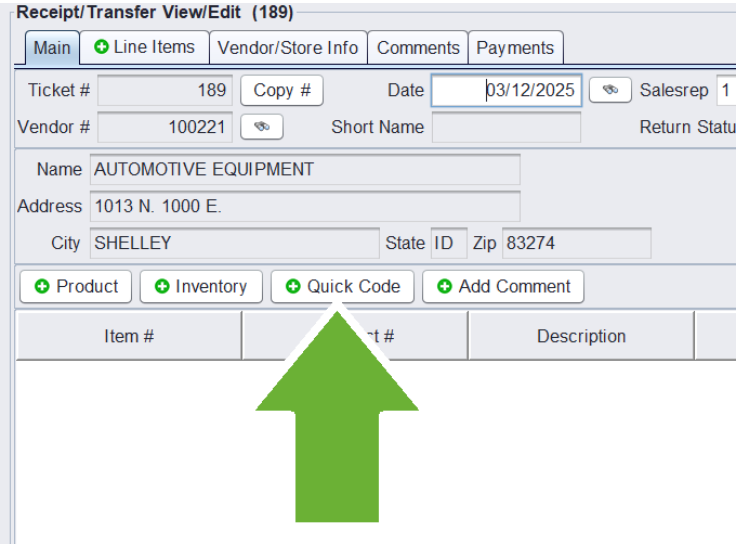
Ongoing expenses for vendors that invoice the shop such as laundry services and landscaping services will need to be posted into HITS.

To post expenses, go **Create**, then **Receipt**



Click to **Select Vendor/ Store** that the expense is for.

Click the **+ Quick Codes** button to see of the various expense codes.



Select the most appropriate expense code, edit the cost and **Save**.

Quick Items Lookup

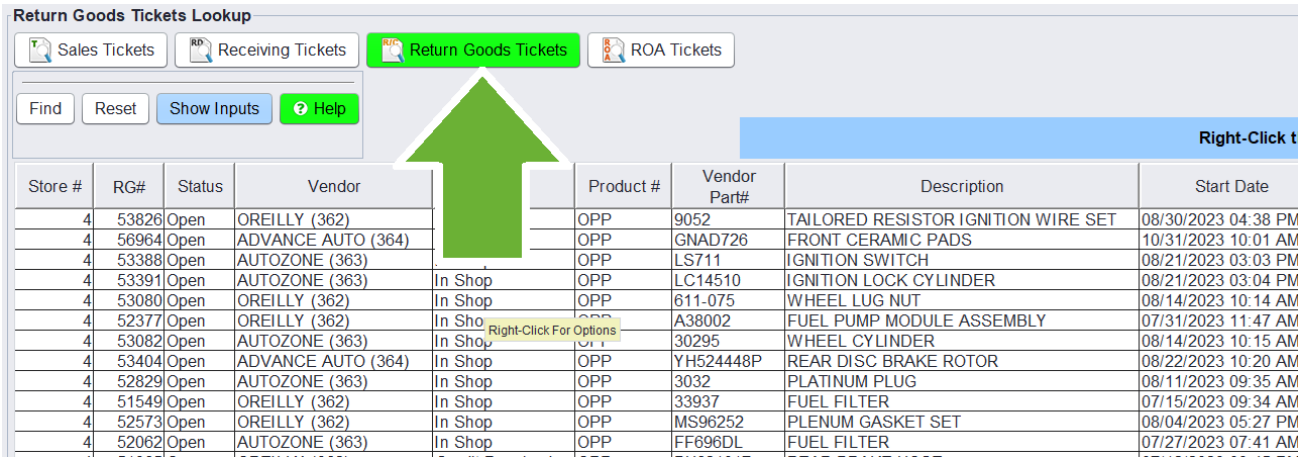
Services | Packages | Quick Codes

Product #	MFG	Size	Description	Qty St	Qty Corp	Aux	Price w/FET	GP%	W
MECH			GENERAL LABOR						
OPP		OUTSIDE	PURCHASE PART						
OPT		OUTSIDE	PURCHASE TIRE						
OPW		OUTSIDE	PURCHASE WHEEL						
OPA		OUTSIDE	PURCHASE ACCESSORY						
OPTUBE		OUTSIDE	PURCHASE TUBE						
X-SS			EXPENSE - SHOP SUPPLIES						
X-TIREDISPOSAL			EXPENSE - TIRE DISPOSAL						
X-COMPUTER			EXPENSE - COMPUTER						
X-FREIGHT			EXPENSE - FREIGHT/ POSTAGE						
X-JANITORIAL			EXPENSE - JANITORAL						
X-LAUNDRY			EXPENSE - LAUNDRY						
X-LOBBY			EXPENSE - LOBBY						
X-OFFICE			EXPENSE- OFFICE SUPPLIES						
X-REPAIRBUILDING			EXPENSE - BUIILDING REPAIR						
X-REPAIREQUIPMENT			EXPENSE - EQUIPMENT REPAIR						
X-REPAIRVEHICLE			EXPENSE- VEHICLE REPAIR						

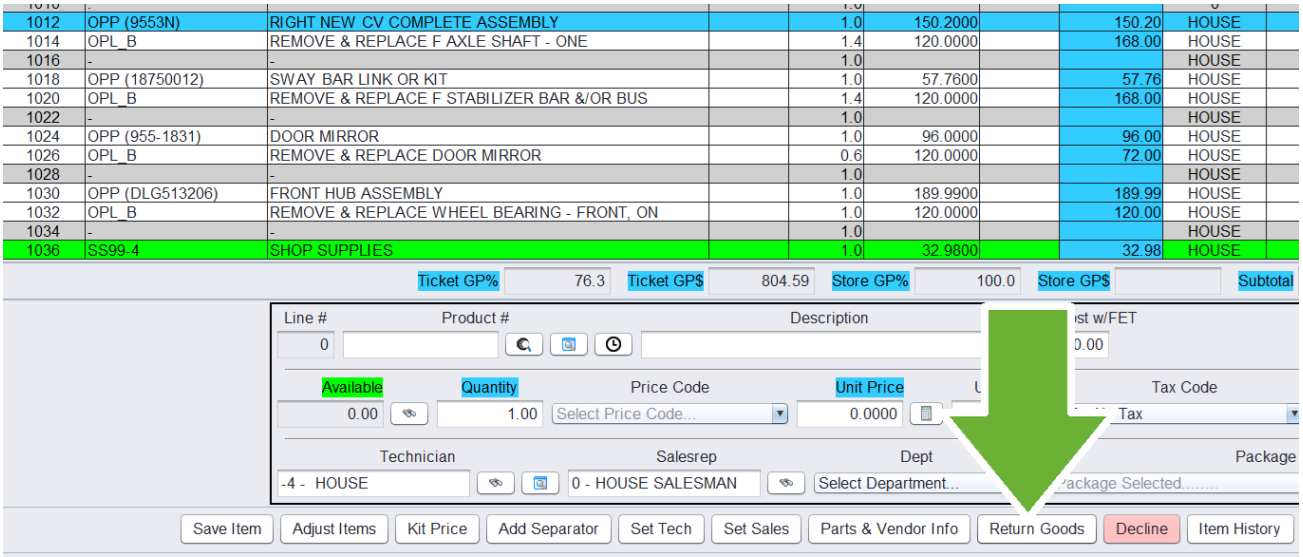
After adding the expense line item, go to the **Payments** tab and proceed to add **Vendor Invoice #** and close the Receipt with the same step as closing a Receipt for stocking inventory.

10. Managing Returns, Cores, & Credits

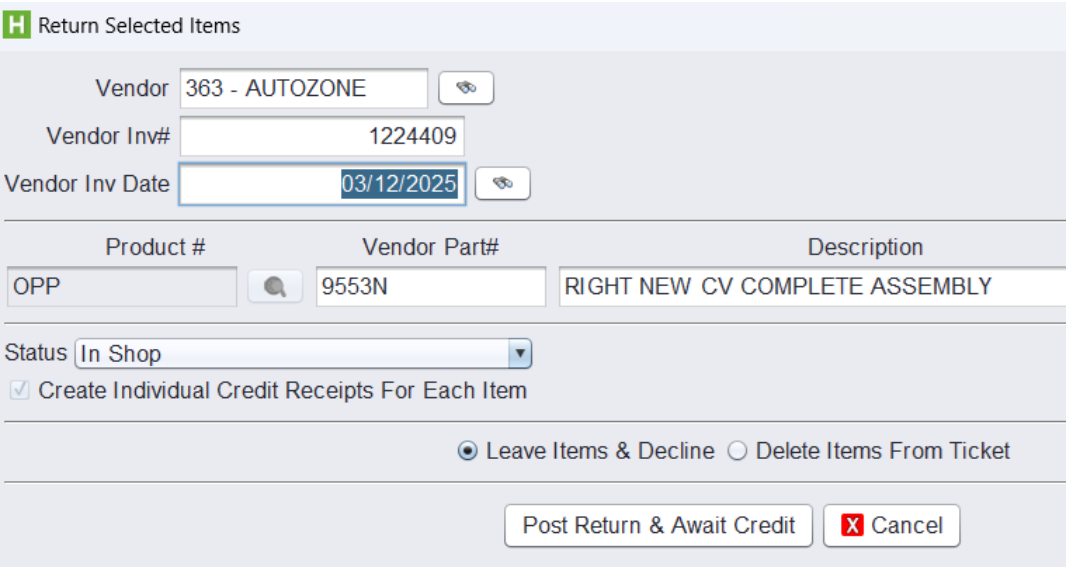
Returns, Cores, and Credits are managed from the **Home**, **Returned Goods Ticket** tab. This tab will track all the parts that are pending credit from vendors.



To add a part to this screen, from the **Workorder**, highlight the part that is needing to be returned and click **Return Goods.** *(This is the recommended process for returning nonstock parts)*.

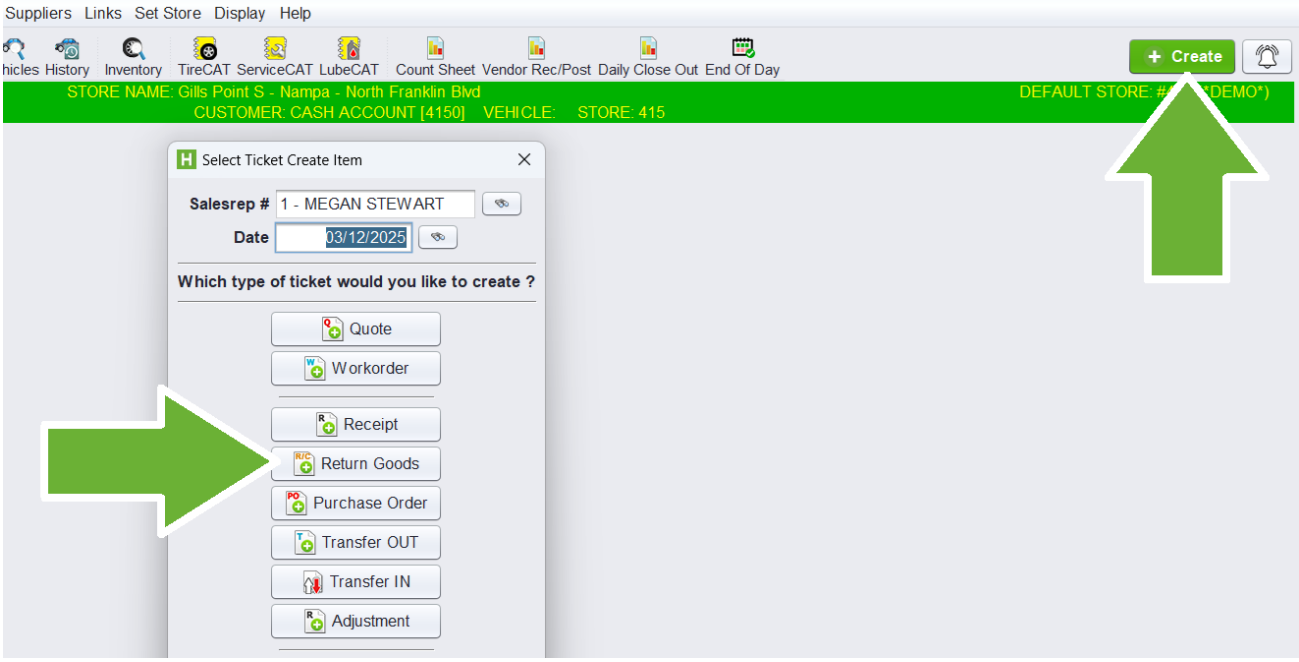


Fill in the required info and click **Post Return & Await Credit** :



This will post the initial Receipt of this part into the system, mark the item as declined on the customer's Workorder and add an open Credit Receipt on the Returned Goods Ticket tracking screen.

You can also create an Open Return Credit by clicking **Create**, **Returned Goods.**



This process is to be used if the item has <u>already been initially received</u> as this process will not post the initial Receipt, just the Credit. *(This is the recommended process for returning stocking parts as stocking parts have likely already been received)*.

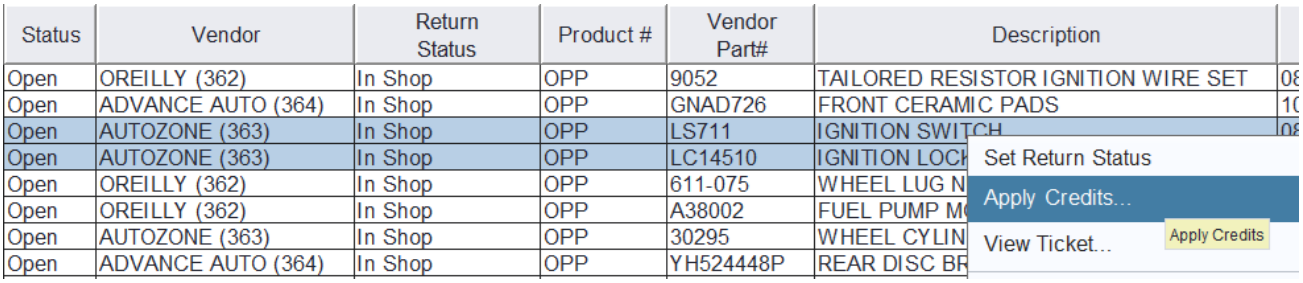
Once you have created this ticket, it can be left OPEN if still awaiting credit or CLOSED if the credit has been received.

Close the Credit like you would any other Receipt ticket in HITS, by going to the **Payments** tab, entering **Vendor Invoice #**, **Applying A/P Terms** and **Closing** the ticket.

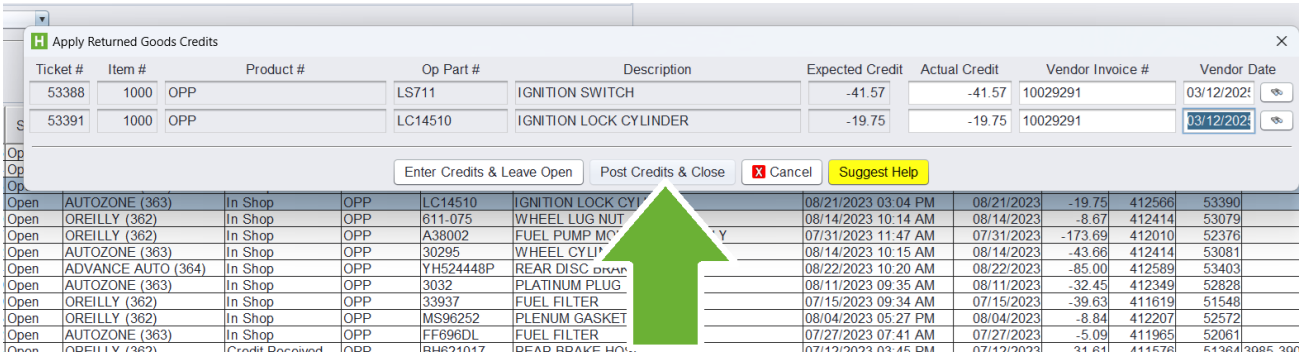
. . . . . .

Credit can also be applied directly on the **Returned Good Tickets** tracking screen.

Highlight one or multiple parts, right-click and select **Apply Credits .**



Enter the required information and click **Post Credit & Close** (assuming your username has permission to perform this function).

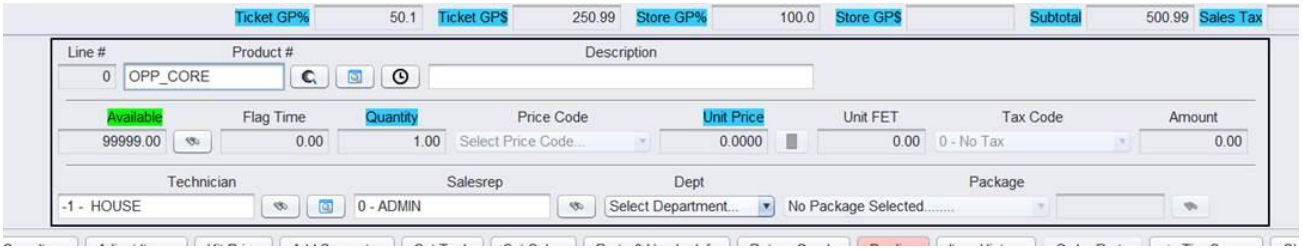


Entering an OPP_CORE line item

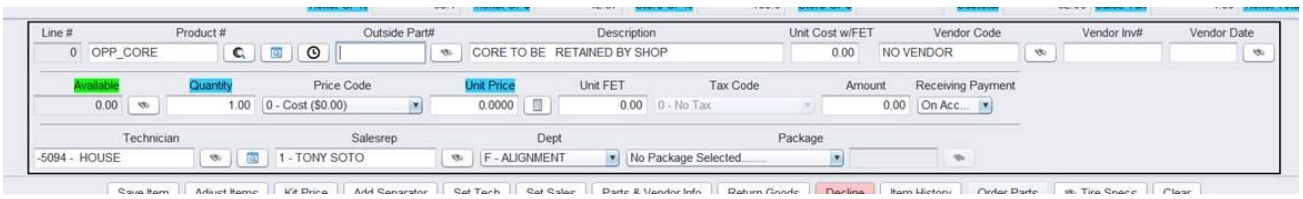
When purchasing a part with a core fee you will need to add a line for the core return.

Click **+Product**

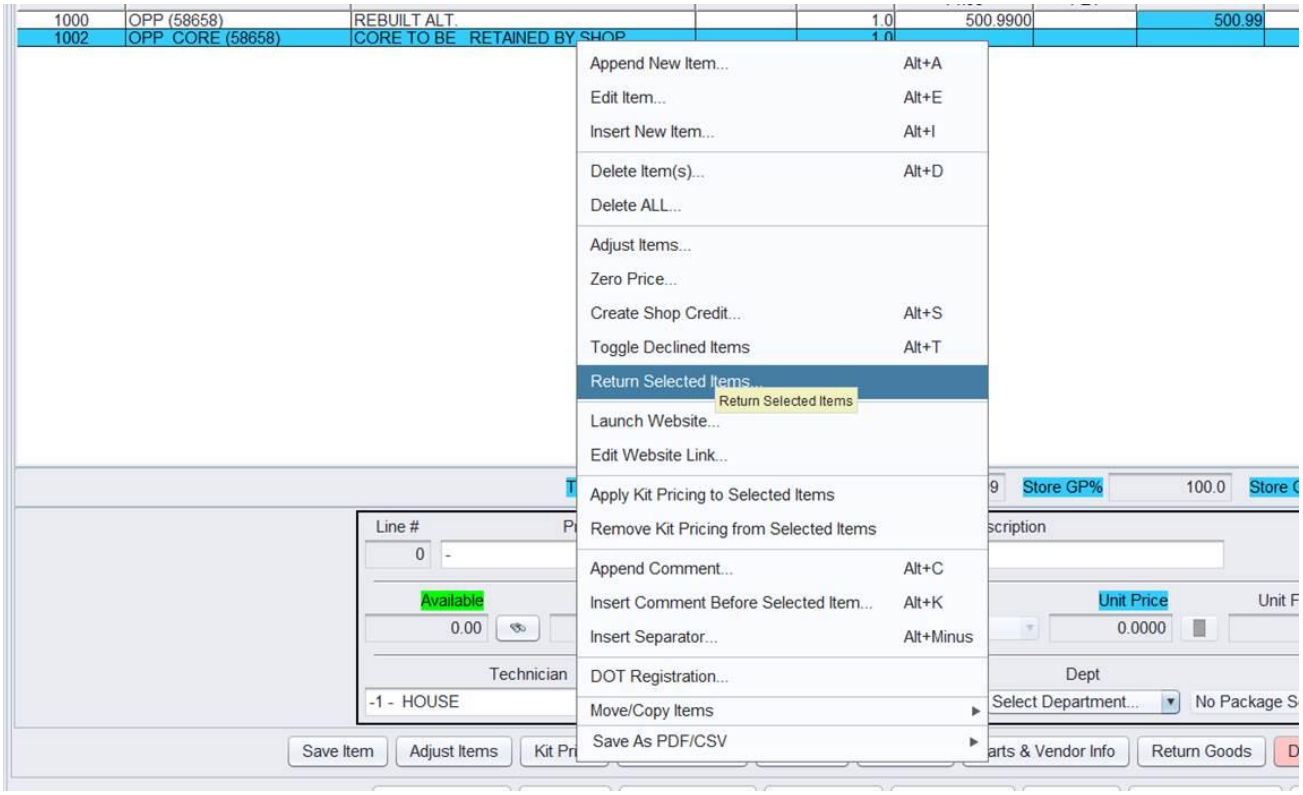
In the Product # type OPP_CORE



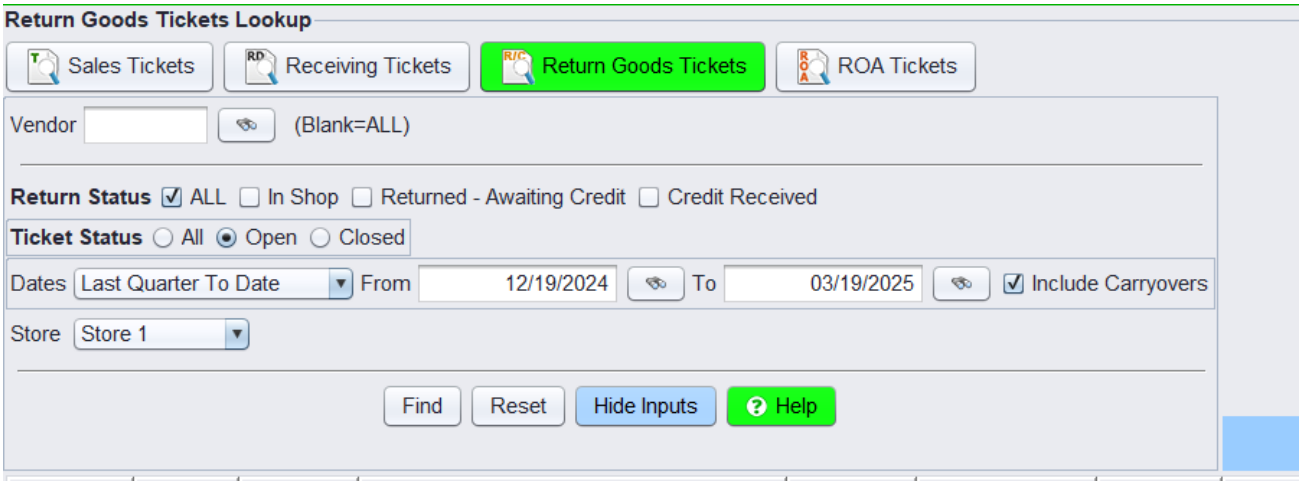
This will give you the core line item box to enter all the information: Fill in the part# and vendor inv# and core cost. Then **save item.**



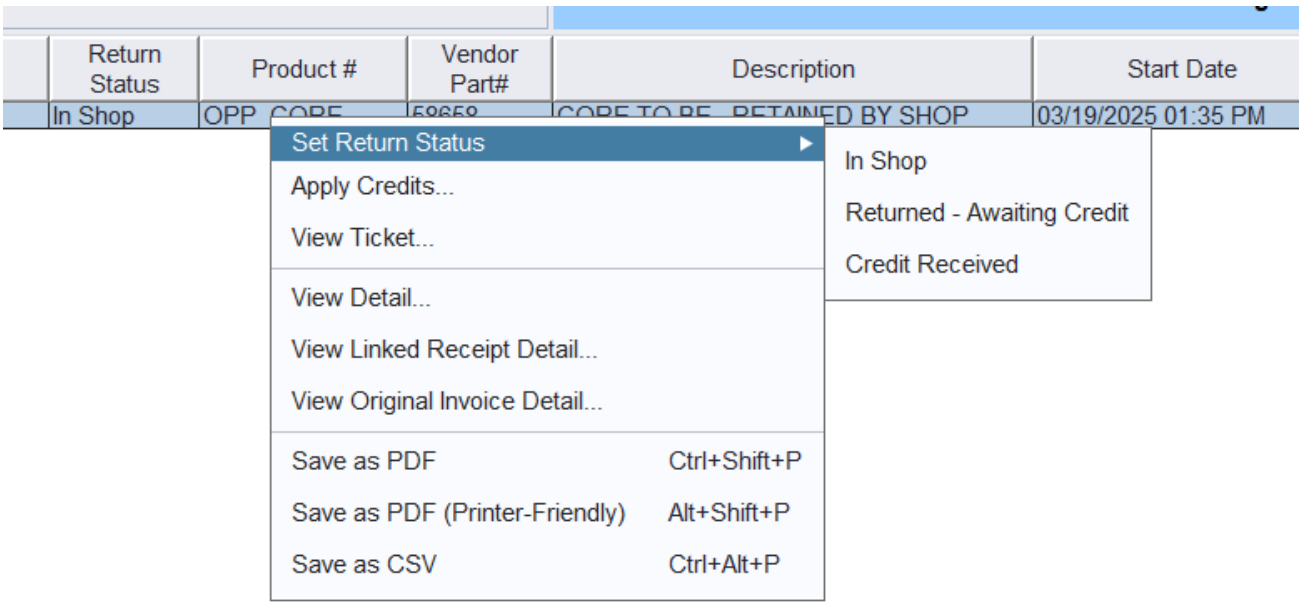
Once the line Item is on the ticket, the Item will need to be returned: to do this right click on the Core to be returned and select Return Selected Items.



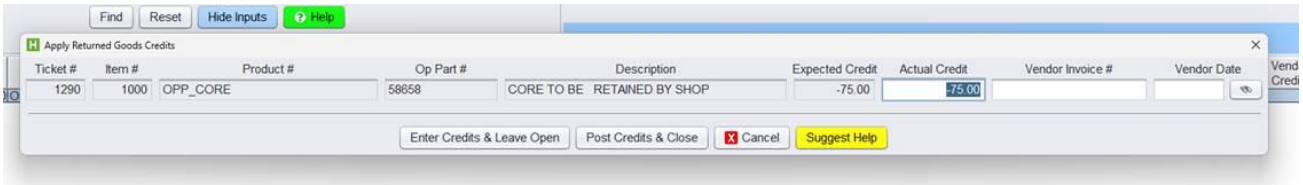
You can change the status of the item by going **to Return Goods Tickets**: Right-click on the line that you want to change the status of.



You can change the status to: In Shop, Returned – Awaiting Credit, Credit Received.

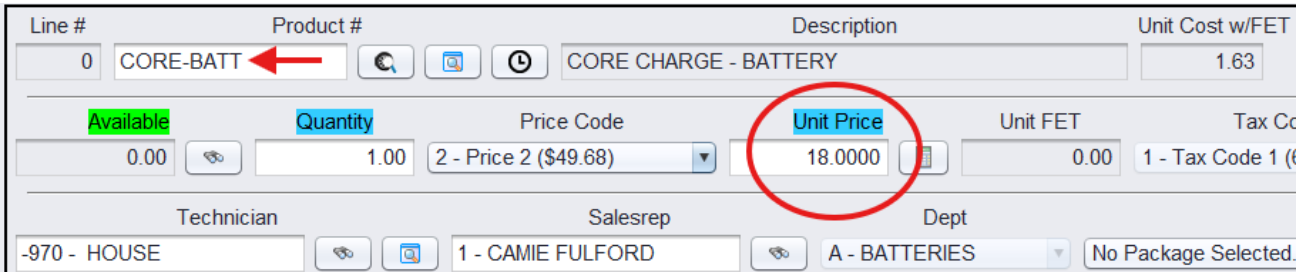


Once you receive the credit you need to Apply Credits by clicking on **Apply Credits**. Enter the Vendor credit Invoice # and the date and select post credits & close.



Entering A Stocking Core

You will have to enter cores when you sell stocking batteries from inventory. The process for this is very similar and uses code (core-batt). The price field is editable, so you can enter what your core credit amount is going to be. The rest of the process is the same as OPP. It will need to be returned from the ticket after you enter it.



11. Transfers

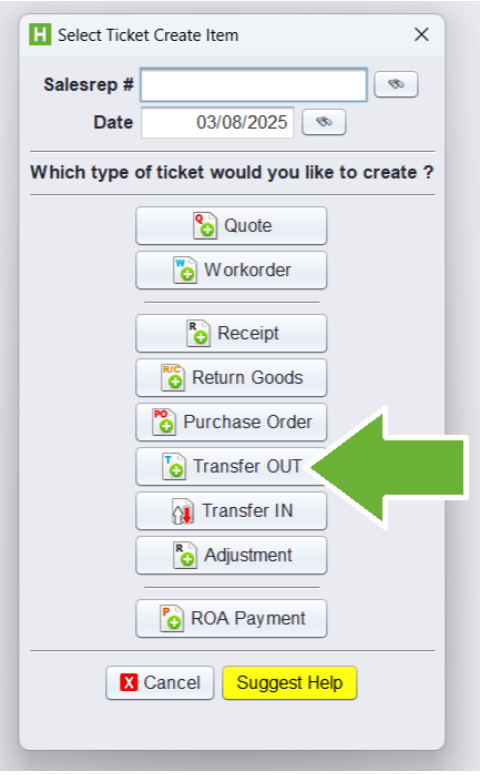
In HITS, stores can transfer inventory to other stores or to/from the warehouse.

Important! In HITS the OUTBOUND (shipping) store must be the store to initiate the transfer process.

There is also a transfer request feature, however this feature is not required to initiate the transfer process

OUTBOUND Transfer

For the OUTBOUND (shipping) store to initiate a transfer, click the **Create** button, then **Transfer OUT**



Click on the store product is being sent to:

Vendor Lookup

Transfer Mode OUTBOUND

Usable At Store #	Vendor#	Short Name	Name
CORPORATE	415	XFER #415	NAMPA - NORTH FRANKLIN BLVD
CORPORATE	417	XFER #417	CALDWELL - SOUTH 34TH AVE
CORPORATE	422	XFER #422	BOISE - N ORCHARD ST
CORPORATE	423	XFER #423	ONTARIO - EAST IDAHO AVE
CORPORATE	5003	XFER #5003	NAMPA - SOUTH

Click **Add Product** to add products to the transfer ticket, enter the Product # and Quantity.

Line #	Product #	Description	Average Cost
0	160070	225/60R16 TOYO ECLIPSE	75.50

Available	Quantity	Unit Cost w/FET	Unit FET	Tax Code	Amount
0.00	4.00	75.5000	0.00	0 - No Tax	302.00

Salesrep	Dept
1 - ROBERT REVERMANN	1 - TIRES

(*On the OUTBOUND transfer, HITS will automatically make the Quantity **MINUS** since products are being taken out of inventory*).

When finished adding products to the ticket, **Print** the OUTBOUND transfer ticket and arrange pickup/delivery of the products to the other store.

These items will be allocated out of the OUTBOUND store's inventory and will show as TIP (Transfer In Process).

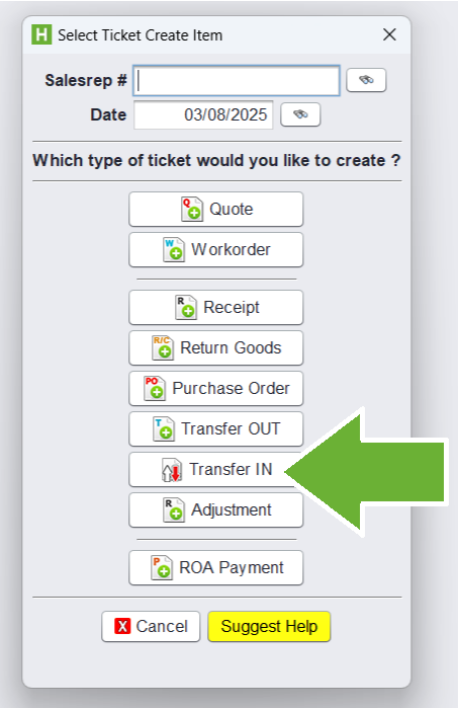
For the OUTBOUND store, there is nothing left to do, assuming the other location properly receives the products.

. . . . . .

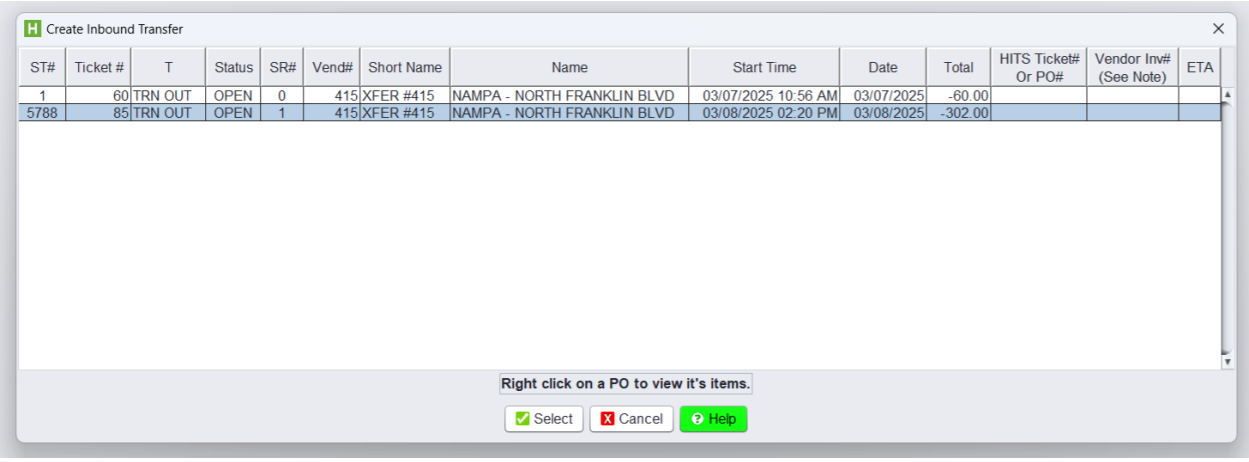
INBOUND Transfer

When products are received at the INBOUND (receiving) store, the receiving store should verify all the products on the shipping paperwork match the products that arrived.

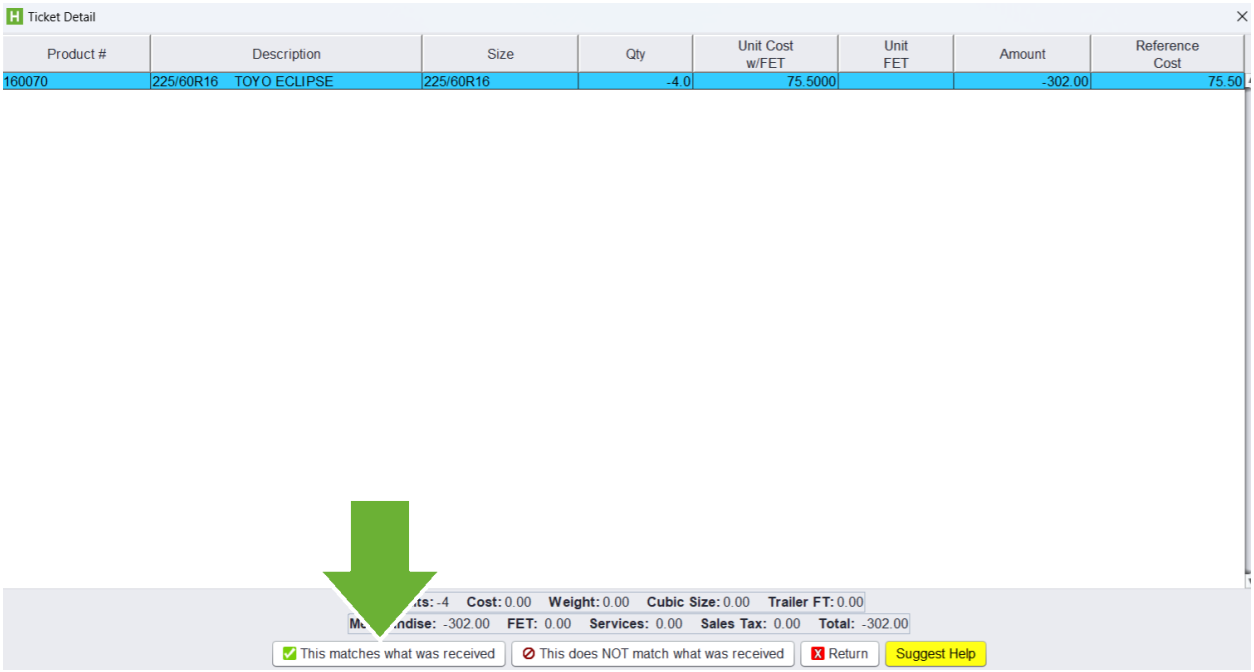
To post the INBOUND transfer in HITS, click the **Create** button, then **Transfer IN**.



This will display all transfers that are INBOUND into your store, select the transfer that matches the **Ticket #** for the shipping paperwork received with products.



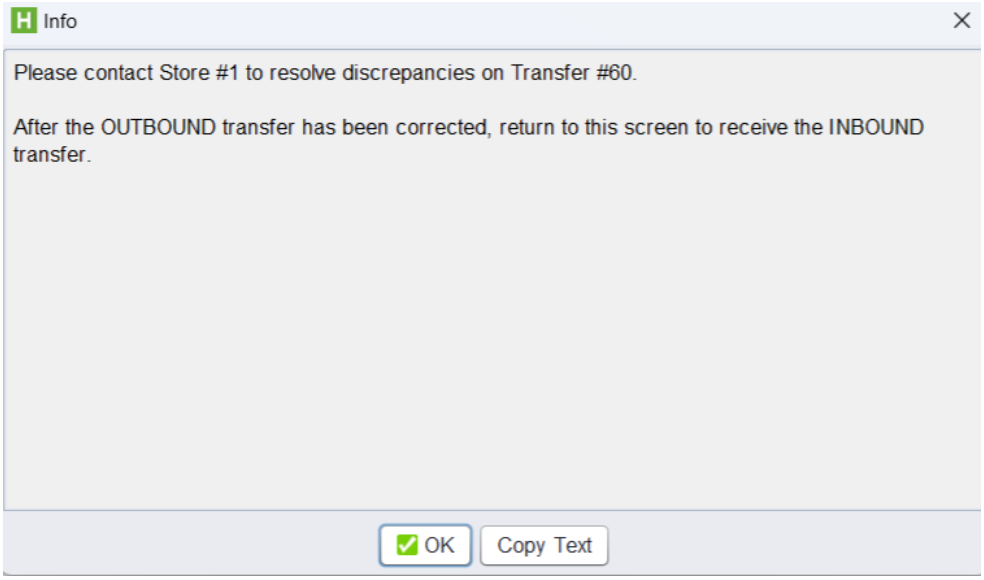
This will give you a preview of the items on transfer. If this matches what you received, click **This matches what was received**.



Then click **YES** to finalize the transfer. This will finalize the transfer on both sides.

If the transfer does not match, click **This does not match what was received.**

Doing so will show this screen and require you resolve the transfer discrepancy with the other store or your District Manager.

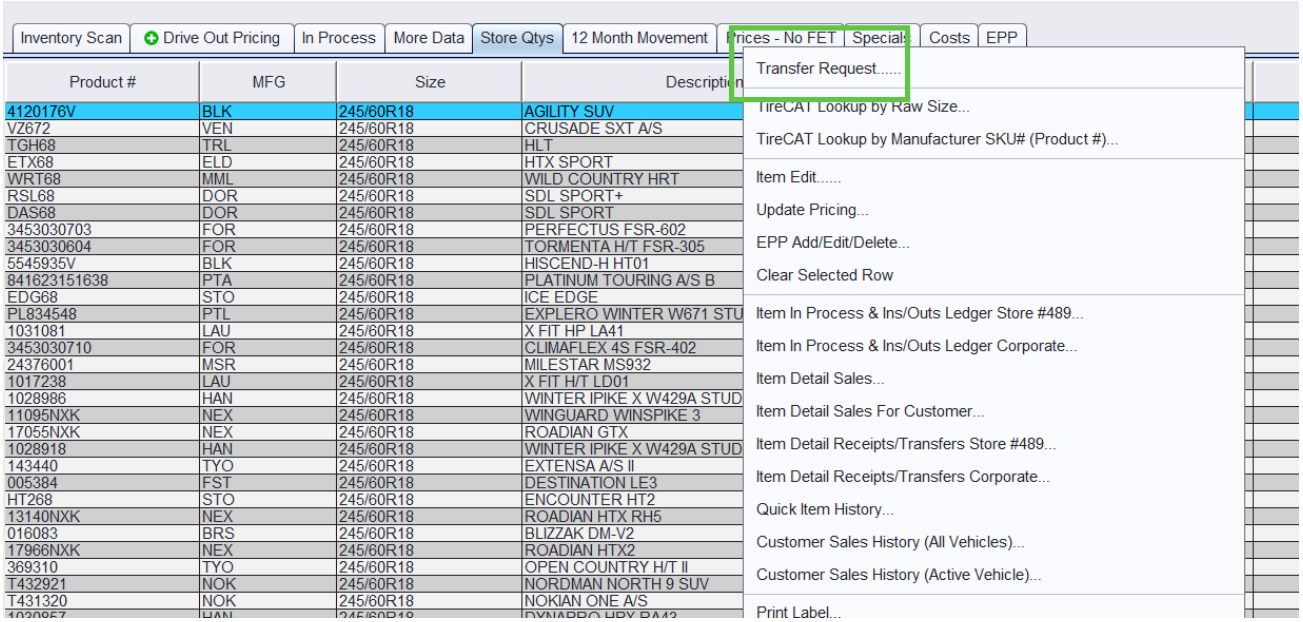


. . . . . .

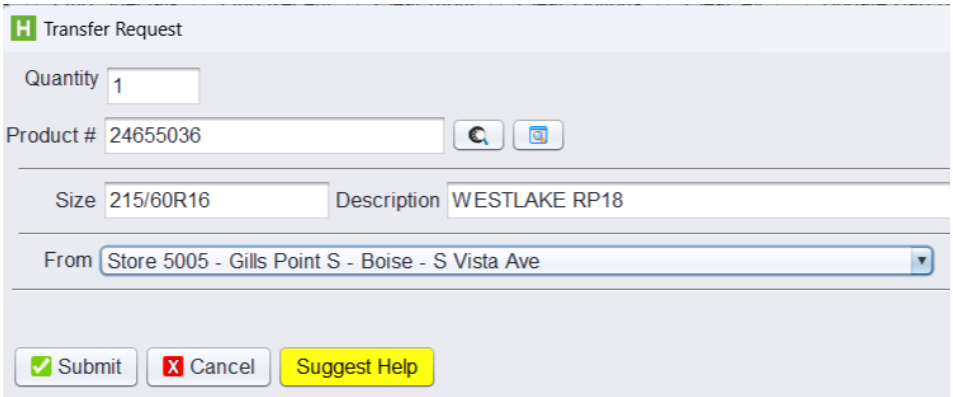
Transfer Request

The transfer process does not require a “request” , however the system allows you to make a transfer request that will alert the OUTBOUND store what you are requesting.

From the inventory Lookup screen, select Store Qtys, right-click on a product and select **Transfer Request.**

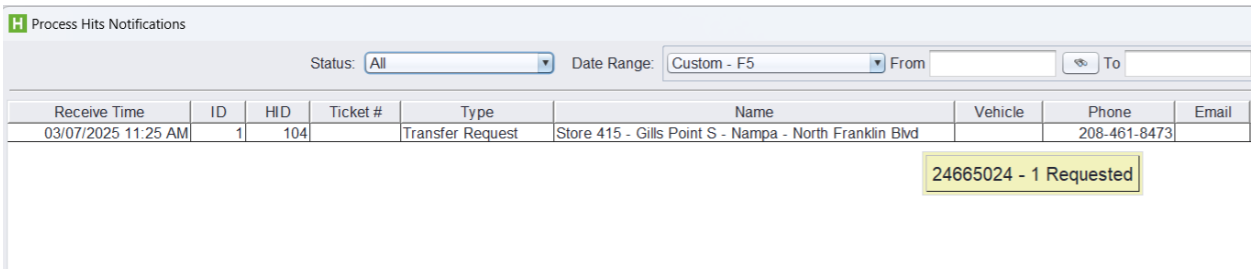


Enter the **Quantity** and **From Store** (*if you have clicked on the correct store on the Store Qty tab the From Store will automatically be filled*).

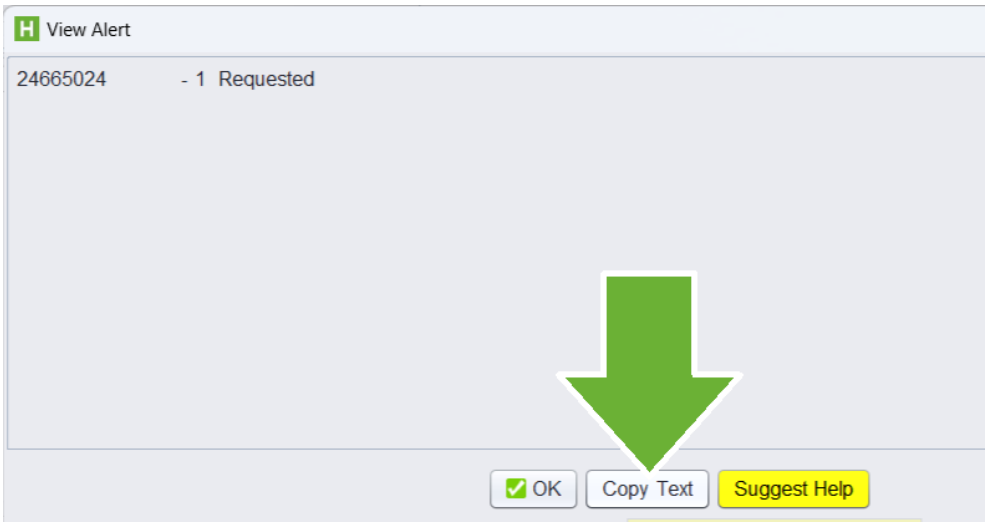


Click **Submit** to submit a transfer request.

This will as a notification in the other store.

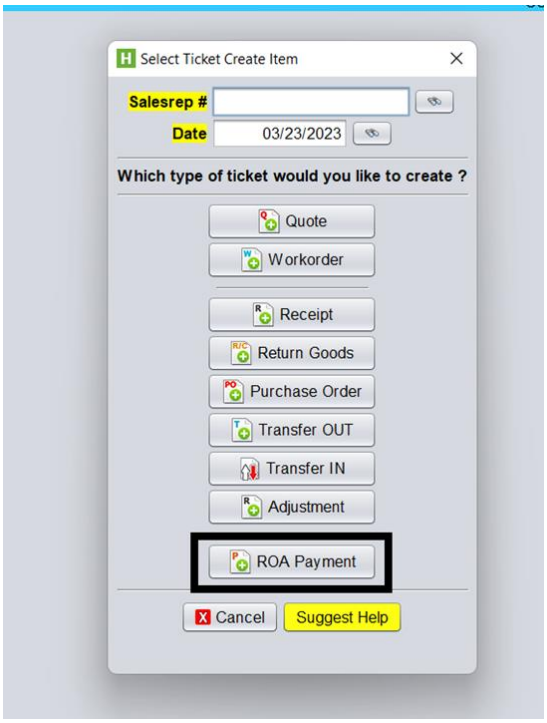


Click on the request, then **COPY TEXT** to copy the product requested to the clipboard.

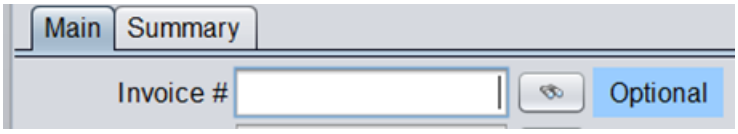


Proceed to generate an OUTBOUND transfer ticket and **PASTE** the product being requested into the OUTBOUND transfer ticket.

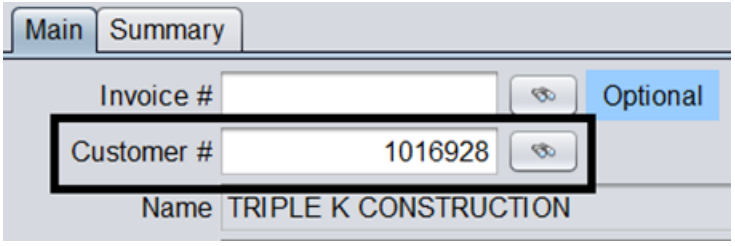
12. Post and Distribute Received on Account Payments (ROA) for A/R customers



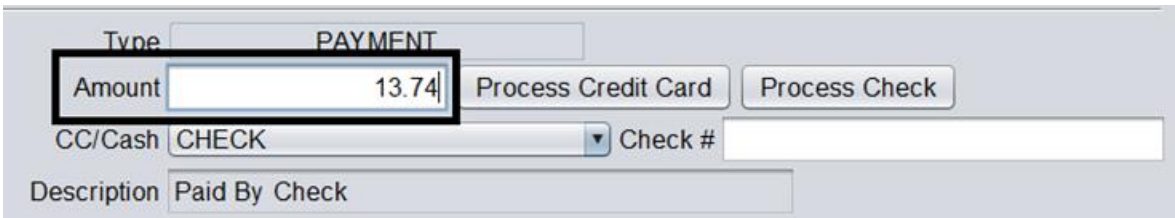
If applying payment to a single specific invoice, you can enter the **Invoice#** the customer is paying. This will pull up the customer and amount due. If posting payments for statement or multiple invoice, leave this field blank.



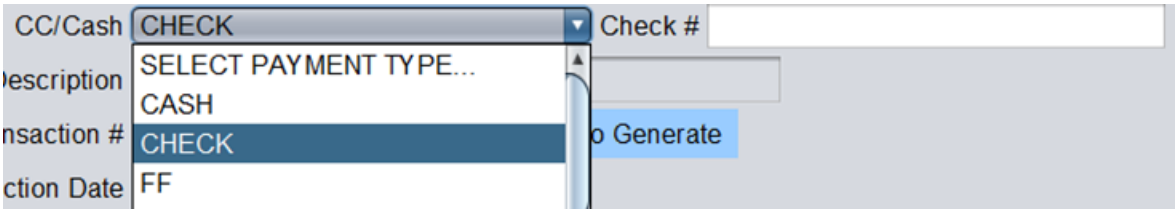
To look up the customer for payment, either type in the customer's account# or perform a customer lookup.



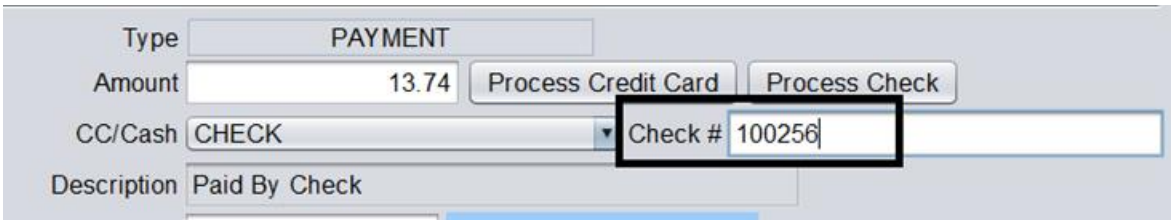
Next type in the **Amount** for payment and hit ENTER:



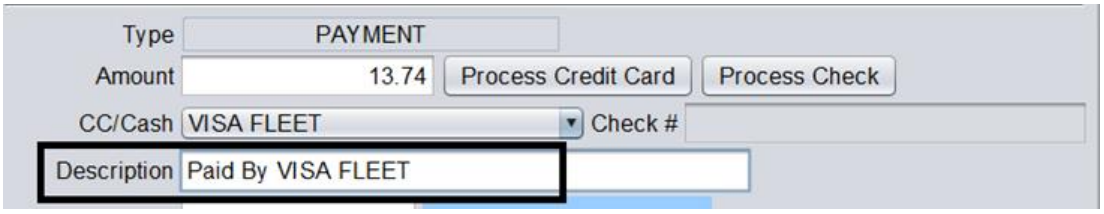
Select the payment method from the dropdown:



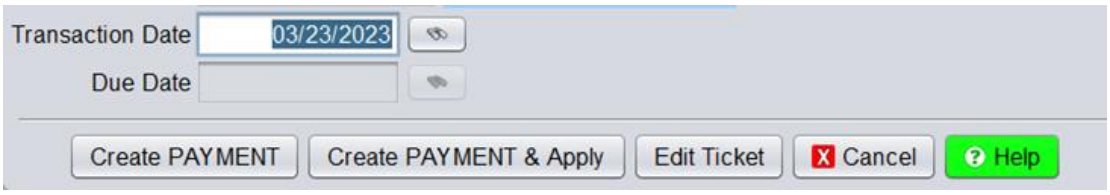
If the customer is paying with CHECK, a CHECK# can be added:



If the customer is paying with a different payment method, a description note can be added:



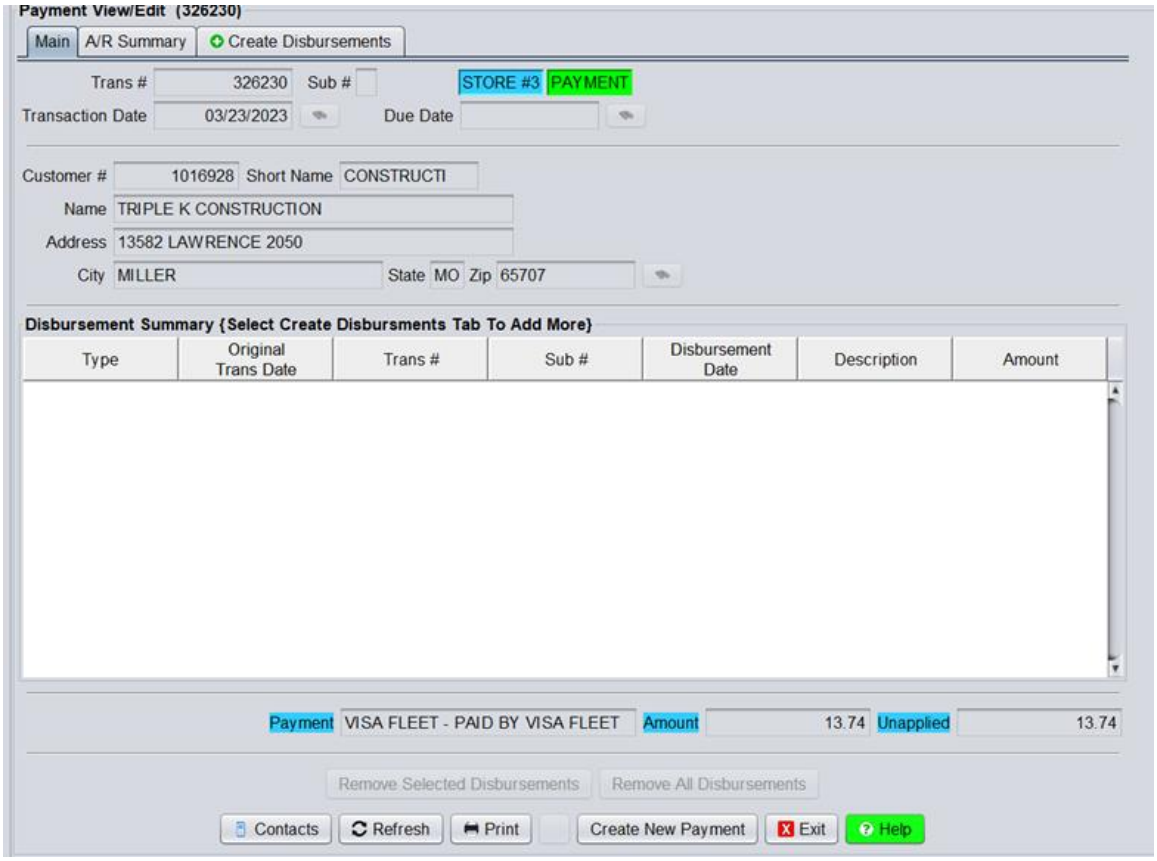
You will likely be posting payment to the current date, but if needed, you can put a previous date for the transaction as long as the store date is still open:



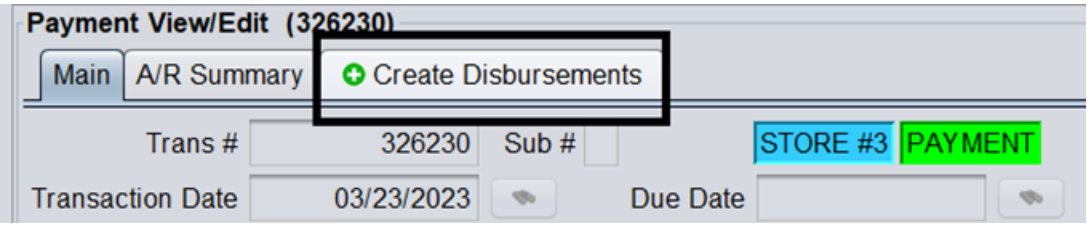
After all information has been added, click the **Create Payment** button.

(Only use the **Create Payment & Apply** button if you are applying to a single Invoice# or want to auto-apply the payment to the oldest transactions on the customer's account).

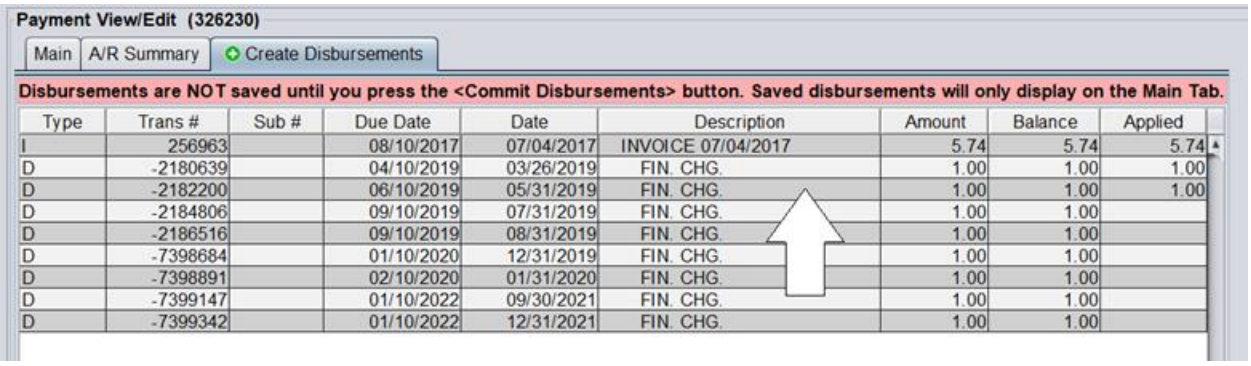
This will post the payment in the system. If needed, you can **Print** out this payment receipt ticket for the customer.



Now you need to continue to disburse the payment to specific invoices/ debits/ credits on the customer's account. o do so, click the **Create Disbursements** tab.

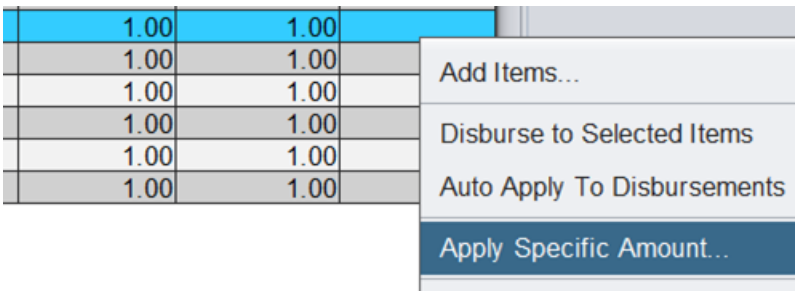


This will automatically retrieve all transactions on the customer's account. **Double-click** on each transaction you would like to disburse to attempt to clear the transaction. (You can also Double-click to un-disburse the transaction)

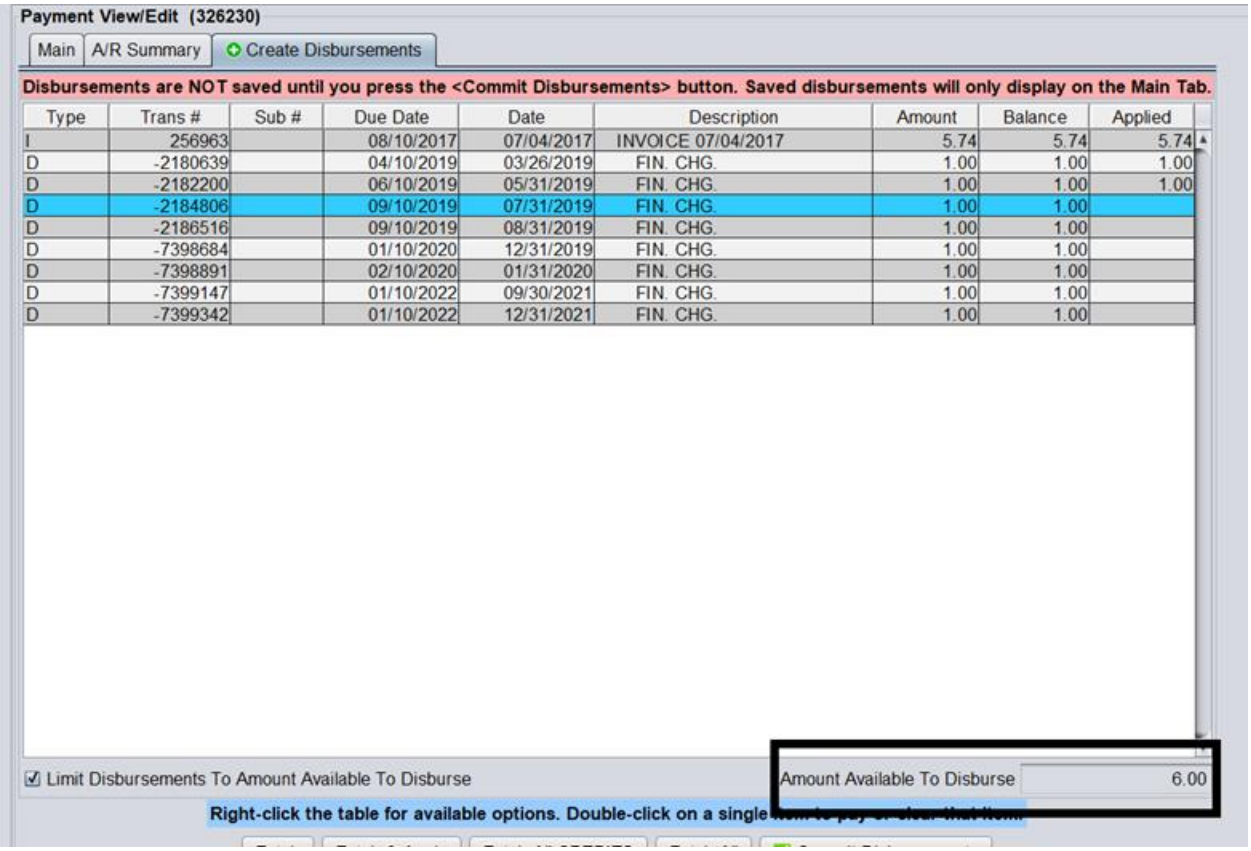


Type	Trans #	Sub #	Due Date	Date	Description	Amount	Balance	Applied
I	256963		08/10/2017	07/04/2017	INVOICE 07/04/2017	5.74	5.74	5.74
D	-2180639		04/10/2019	03/26/2019	FIN. CHG.	1.00	1.00	1.00
D	-2182200		06/10/2019	05/31/2019	FIN. CHG.	1.00	1.00	1.00
D	-2184806		09/10/2019	07/31/2019	FIN. CHG.	1.00	1.00	
D	-2186516		09/10/2019	08/31/2019	FIN. CHG.	1.00	1.00	
D	-7398684		01/10/2020	12/31/2019	FIN. CHG.	1.00	1.00	
D	-7398891		02/10/2020	01/31/2020	FIN. CHG.	1.00	1.00	
D	-7399147		01/10/2022	09/30/2021	FIN. CHG.	1.00	1.00	
D	-7399342		01/10/2022	12/31/2021	FIN. CHG.	1.00	1.00	

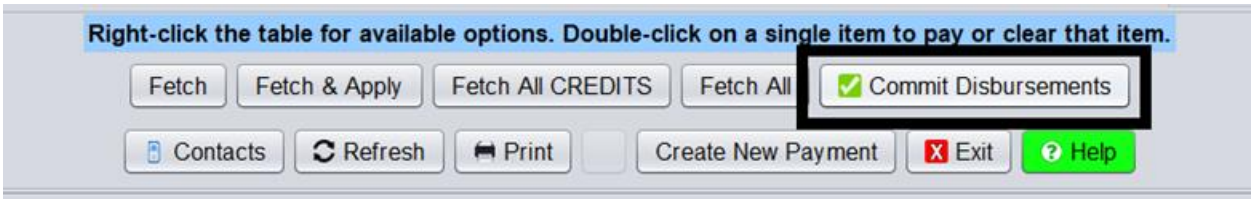
If you do not want to clear the entire amount of the transaction, **right-click** to **Apply Specific Amount.** This will allow you to enter how much to disburse.



As you disburse, the **Amount Available To Disburse** will be updated. This will decrease as you post payments to Invoices and Debits, and increase if you click on any NEGATIVE Invoices or CREDIT memos.

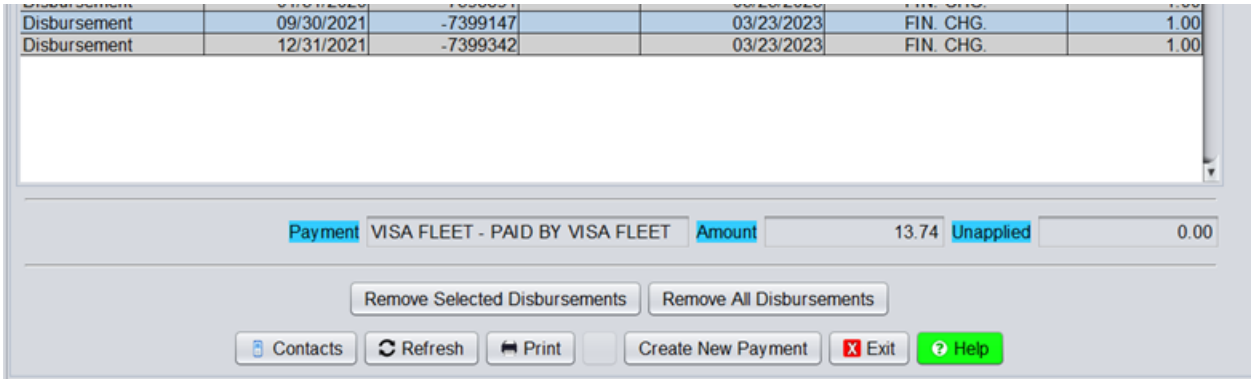


Once done with your disbursement, click the **Commit Disbursements** button to finalize your disbursement.



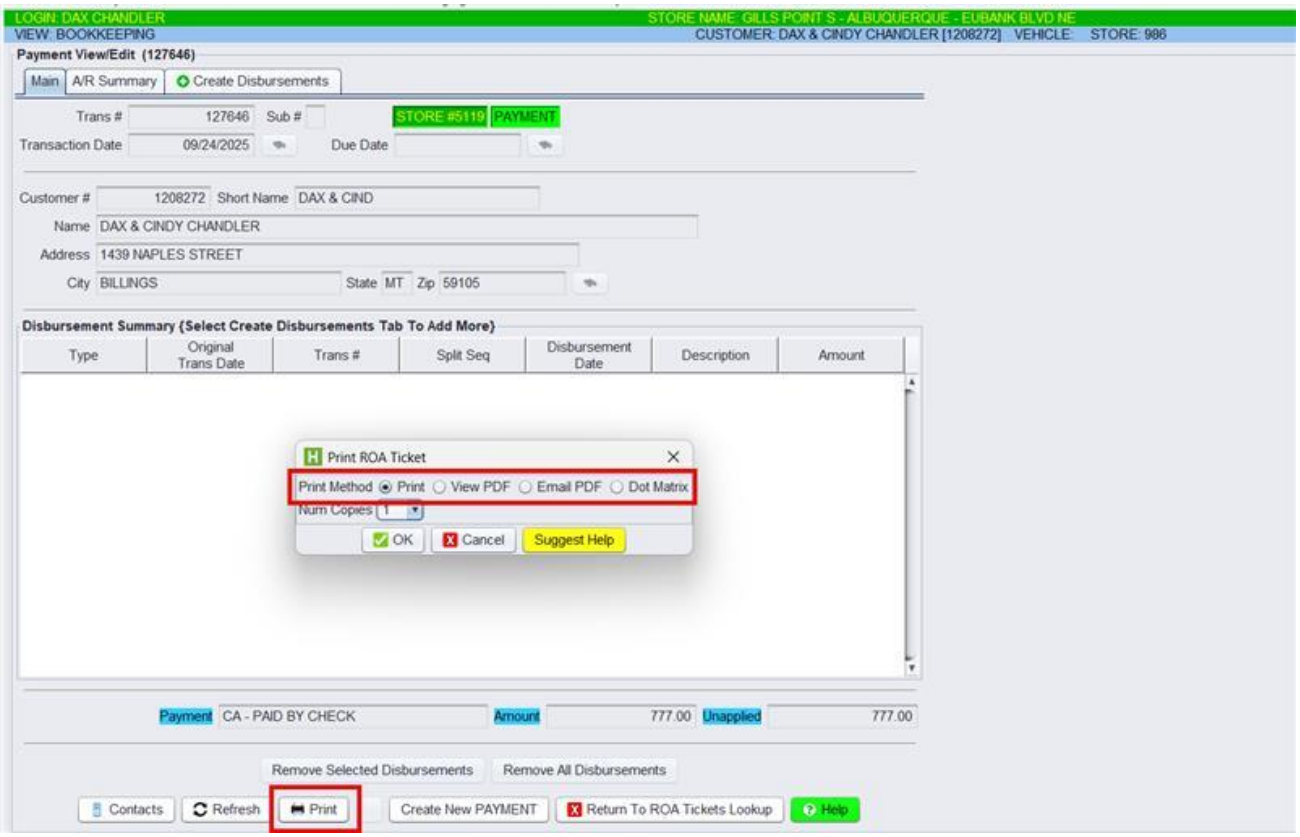
Disbursement can be edited at any time in the future. To remove disbursements, you can click the **Remove Selected Disbursements** or **Remove All Disbursements** button.

When done, you can **Exit**.



How to Print an ROA Receipt for a Customer

Print a receipt from the Payment/Edit Window. After you create a payment in ROA, enter the amount and select Create PAYMENT. On the next screen, you'll see a PRINT box at the bottom, which lets you email or print the payment receipt.



You can also go to ROA Tickets on the HOME screen, double-click the payment line item, and when the Payment/Edit box opens, select PRINT at the bottom to email or print the receipt.

Example of ROA Receipt:

Payment Receipt #127646

****

GILLS POINT S - ALBUQUERQUE - EUBANK BLVD NE
241 Eubank Blvd NE
ALBUQUERQUE, NM 87123
505-265-6405

DAX & CINDY CHANDLER
1439 NAPLES STREET
BILLINGS, MT 59105
Ph: (406)460-0464

ACCOUNT#: 1208272
DATE : 09/24/25
: 127646

Transaction#	Sub#	Trans.Date	Description	Disbursement Date	Trans.Amount

Check #/Description	Cash/CC Code	Transaction Amount
Paid By Check	CA	777.00

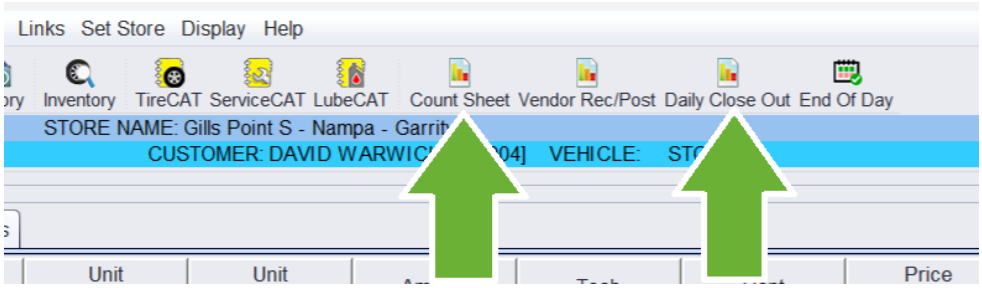
Future Due*	Current Due*	Past 1-30*	Past 31-60*	Past 61-90*	Past 90+*	AcctBalance*
-777.00	0.00	0.00	0.00	0.00	0.00	-777.00

*Aging & Account Balance Is As Of: 09/24/2025

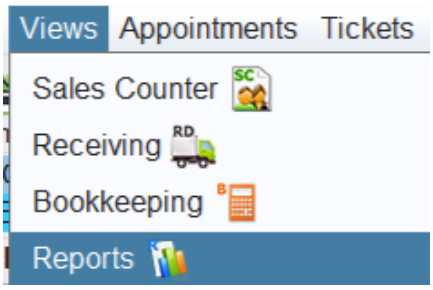
Page 1 of 1

13. Reports

Two of the commonly used reports will be listed on the main toolbar with shortcuts, the **Count Sheet** and the **Daily Close Out** report.



Other reports can be found by going to **Views** > Reports.



Some reporting may be limited by user permission. Check with your District Manager to learn if there is any additional reporting you will need to run.

14. End Of Day Closing Process

The end-of-day process will need to run each day at the end of the day to finalize the day of business.

Daily Checklist of Accounting Requirements:

- ❑ Close registers once the shop is cleared of customers
- ❑ Enter any fuel and/or towing sales or bills/receipts
- ❑ Verify customer work orders are closed on Sales Counter Home screen
- ❑ Reconcile and post all vendor bills/item receipts using the Vendor Rec/Post tab
- ❑ Count the cash, tally checks, reconcile card sales, and prepare bank deposit slips
- ❑ Validate the HITS summary, and post the batch
- ❑ Close the Day in HITS
- ❑ Log out of POS and other apps
- ❑ Scan daily deposit documents

- ❑ Secure the cash and till drawers in the safe
- ❑ Perform bank deposit on the way home, at least 3x/week

Activities you should perform throughout the day, real-time, to ensure a faster End of Day Close:

- ❑ Enter item receipts into HITS as soon as delivery has taken place; don't wait until end of day
- ❑ Document returned quantities and/or vendor credits in HITS
- ❑ Provide supporting documentation and submit Brex expenses/petty cash – at minimum, by end of day Friday

a. Close registers once the shop is cleared of customers

Do not remove till drawers until the last customer has left the store and all doors are locked. Remove the till and start the cash count activities in the presence of another employee.

b. Fuel and/or Towing

Fuel and Towing sales and bills must be collected from their respective systems and posted into HITS using a work order:

1. Create a new work order.
2. Enter a FUEL line item for fuel sales.
3. Enter a FUEL line item for fuel receipts/replenishments.
4. Make a cash ticket for all towing or fuel for the day.
5. Close work order.

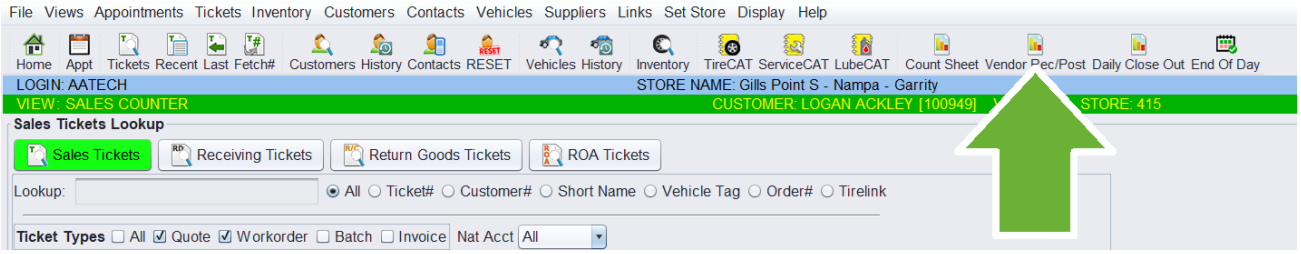
c. Verify the Customer Work Orders are Closed

1. On the Sales Order Home Screen
2. Find the open work orders
3. Close any work orders that (were paid and not closed? Any to be voided?)

d. Vendor Bill Reconciliation

To review your nonstock parts info and ensure Vendor Invoice #s have been entered correctly, you can go to the **Vendor Reconciliation/Post** screen to review.

This is not a required end-of-day process if you have been properly entering your vendor invoices throughout the day.



1. Click the Vendor Rec/Post button from the main screen
2. Ensure the correct day is populated (defaults to the current day)
3. Click Fetch Items
4. Click the box to the far right each line item to post - **need info from David A re: selecting items.

What “Paid and Not Closed” Means

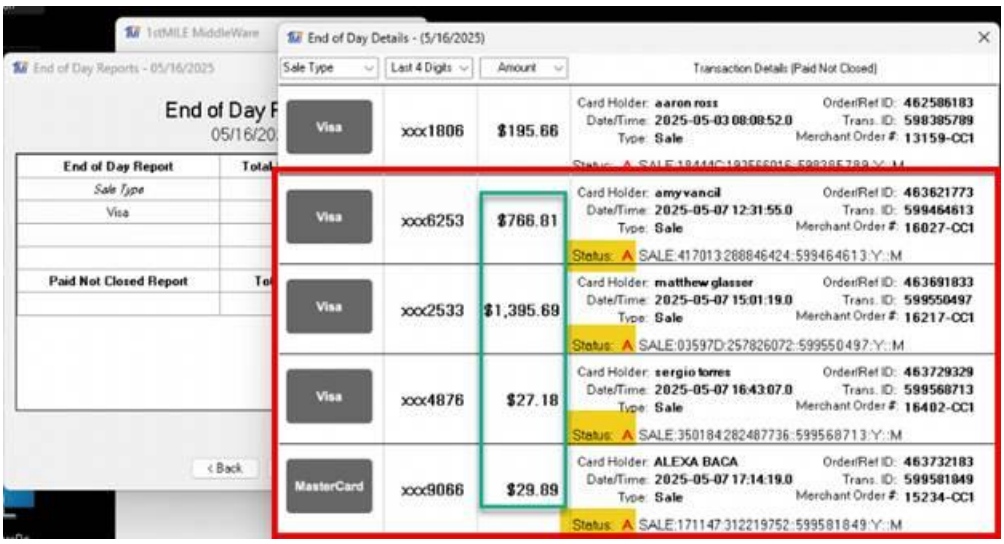
Here's an explanation of what "paid" but not "closed" might mean and how to address it:

- **What "Paid" Means**:
- The customer's credit card transaction has been authorized and approved by the payment processor.
- The amount has been charged to the customer's card.
- **What "Not Closed" Means**:
- The batch processing, which transfers funds from the payment processor to your account, has not yet completed.
- This process may take anywhere from a few hours to a couple of days.
- Once the batch is processed, the transaction will be marked as "closed".

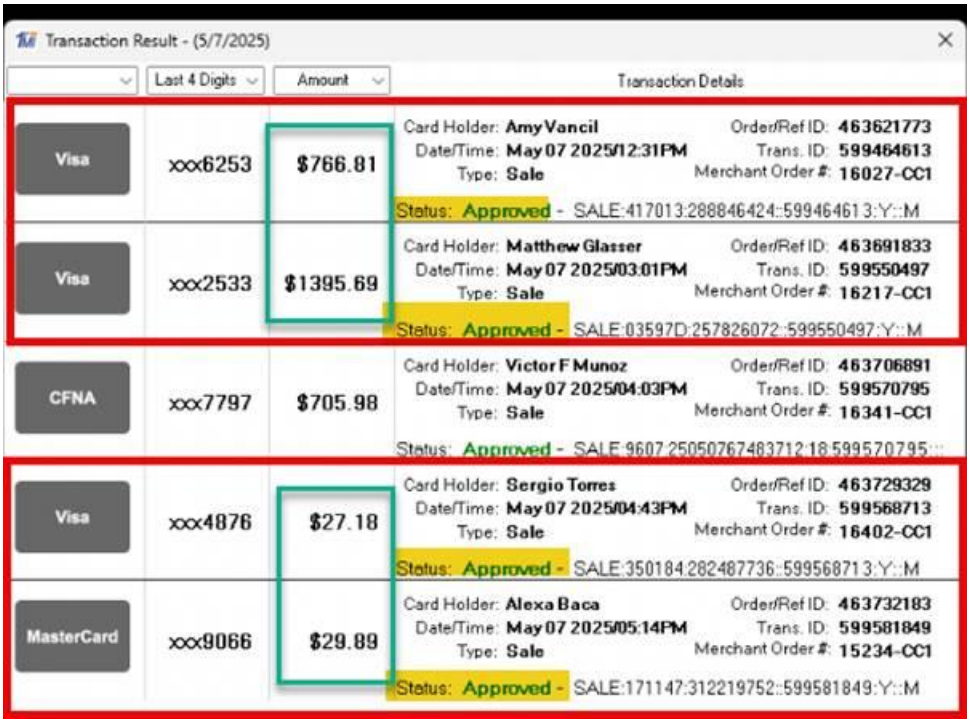
If your 1st Mile Middleware application indicates that a transaction is "paid" but not "closed," it likely means the payment has been processed and charged to the card, but the batch processing for transferring funds to your account hasn't completed yet. You can verify this by comparing the dates of the “paid not closed” transactions in the 1st Mile EOD reports with the Transaction reports for those days. For example, look at

transactions from today, dated 05/03 and 05/07. My examples focus on 05/07 to demonstrate what you are observing.

The first screenshot is the EOD Report from today, displaying the "Paid Not Closed" message along with the credit card transaction, amount, and status marked with a bright red "A."

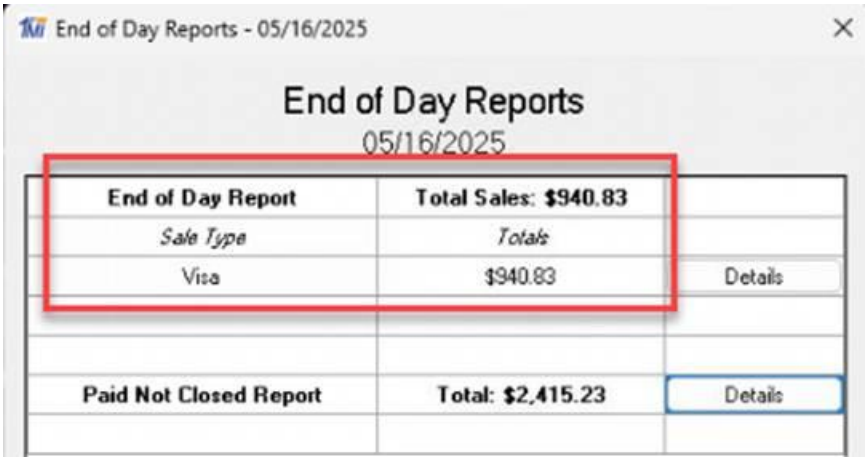


The second screenshot shows the Transaction search for 05/07. As seen, these transactions were approved, meaning the money was taken from the card. It corresponds with the red "A" on the EOD, indicating approval.

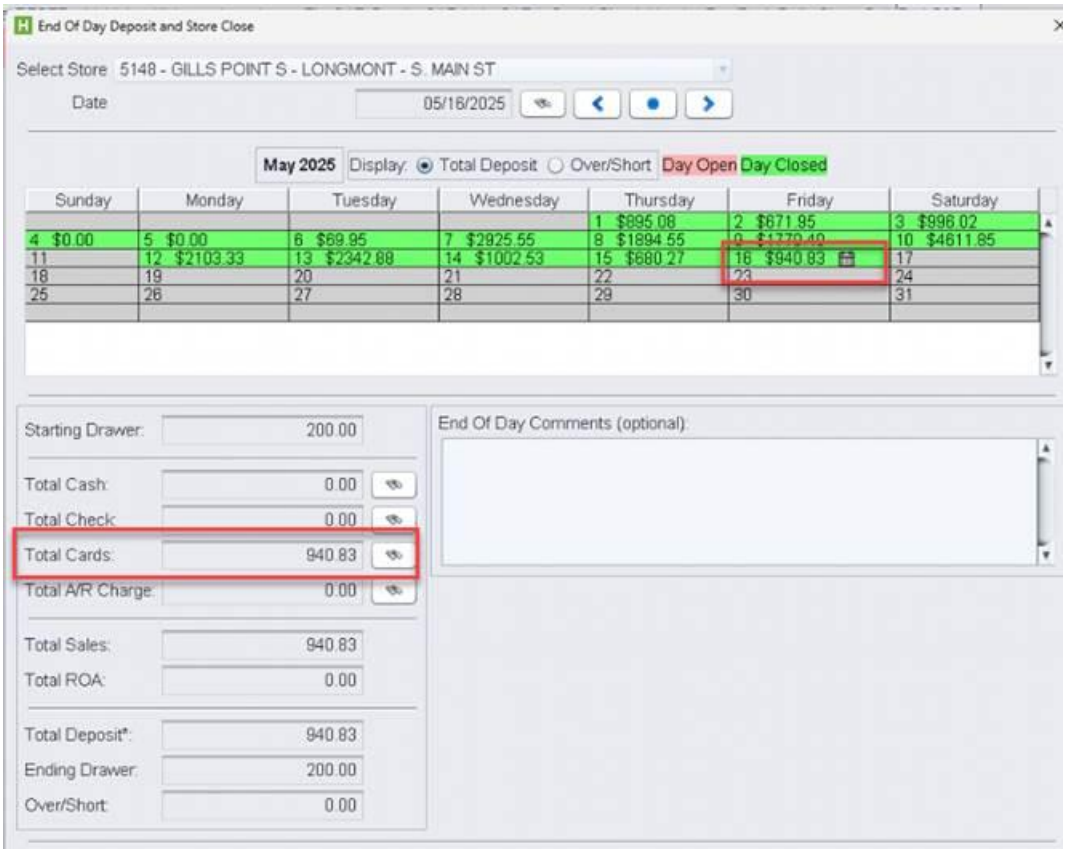


Additionally, the payment amounts in HITS match the End of Day totals in 1st Mile. The EOD totals in 1st Mile do not include "Paid Not Closed" transactions, yet they align with the payments recorded to invoices in your End of Day in HITS, confirming the accuracy of your EOD.

Here is your EOD Report in 1st Mile showing the credit card transactions for the day.



And here is your EOD Report in HITS showing your credit card transactions for the day.



The "Paid Not Closed" notifications are simply informational and require no action on your part, as the payments have been taken and are pending closure in the payment system. These items typically clear on their own, and generally, there is no need for concern. It is merely part of the transaction reporting in 1st Mile.

e. Verify tender, drawer, and post deposit

1. Go to the **End Of Day** screen to review sales, tender types, and drawer.

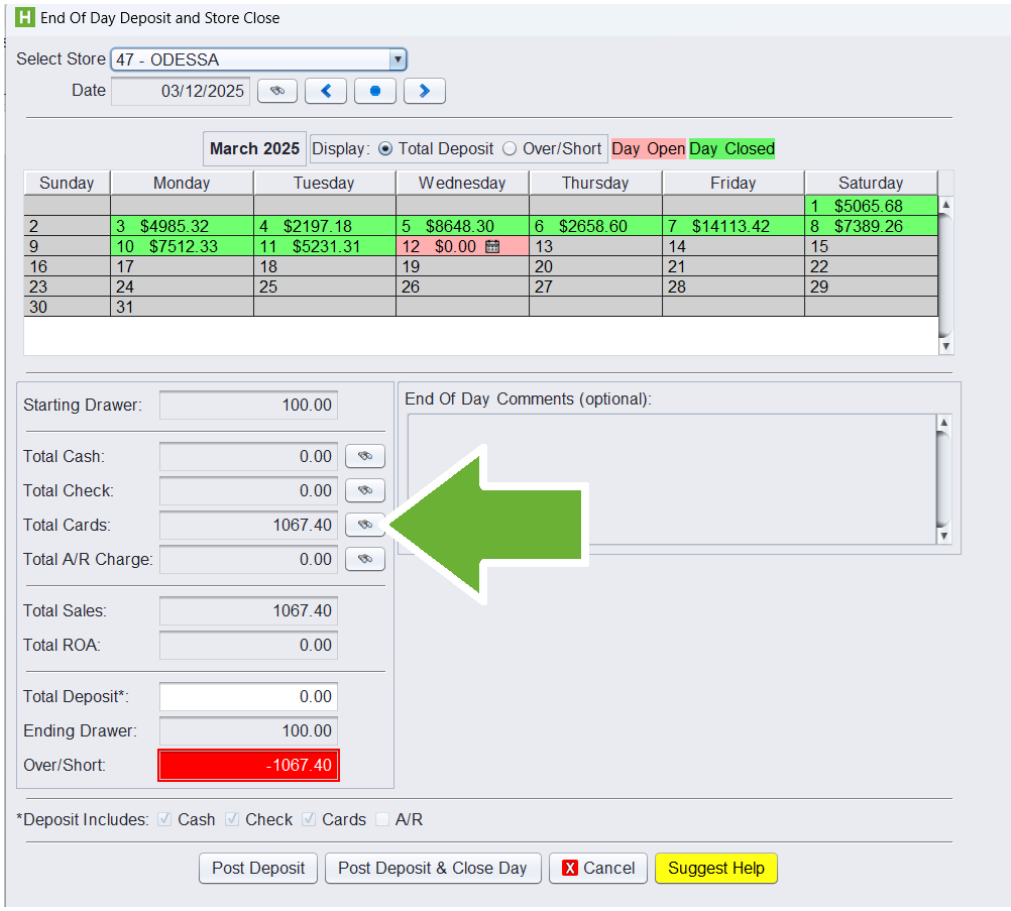
2. Reconcile total cash, check, and card transactions in each Totals category:

Totals Category	Reconcile Against	How
Total Cash	The physical cash in the till	Count the cash in the till and ensure that the amount matches Total Cash

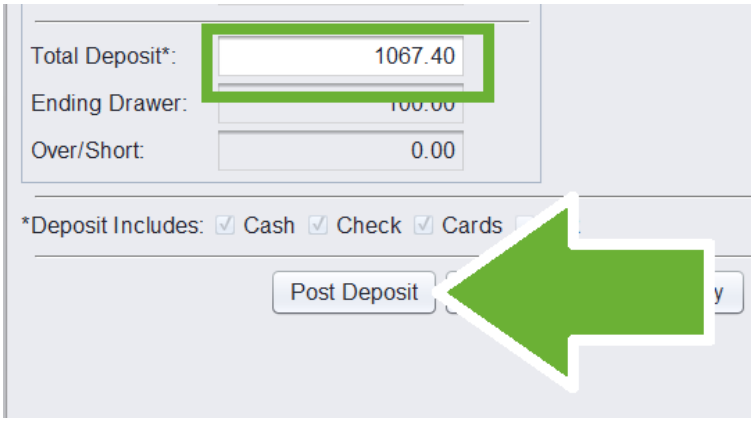
Total Checks	The physical checks in the till or safe	Click the magnifying glass in the End of Day screen next to Total Checks. Compare each physical check against the list of check payments in HITS. Research any discrepancies by looking at closed invoices and deposits; when you have identified the issue make the update within HITS by editing the payment type or closing the paid ticket.
Total Cards	First Mile End of Day report	Compare the total of the Total Cards field in HITS to the total in the First Mile End of Day report. If the totals do not match, use the magnifying glass in HITS to view the individual card transactions and compare to the First Mile report detail. If you find discrepancies, notify your SCM and SCA.

NOTE: You can click on the binoculars on each subtotal to investigate any discrepancies.

NOTE: Consider that **Batch tickets can still be edited prior to end of day close**, so if you need a fix made to any tickets, a user with permission access can make the fix prior to the ticket being finalized.



3. Enter the deposit amount for all tendered payments verified and click **Post Deposit.**



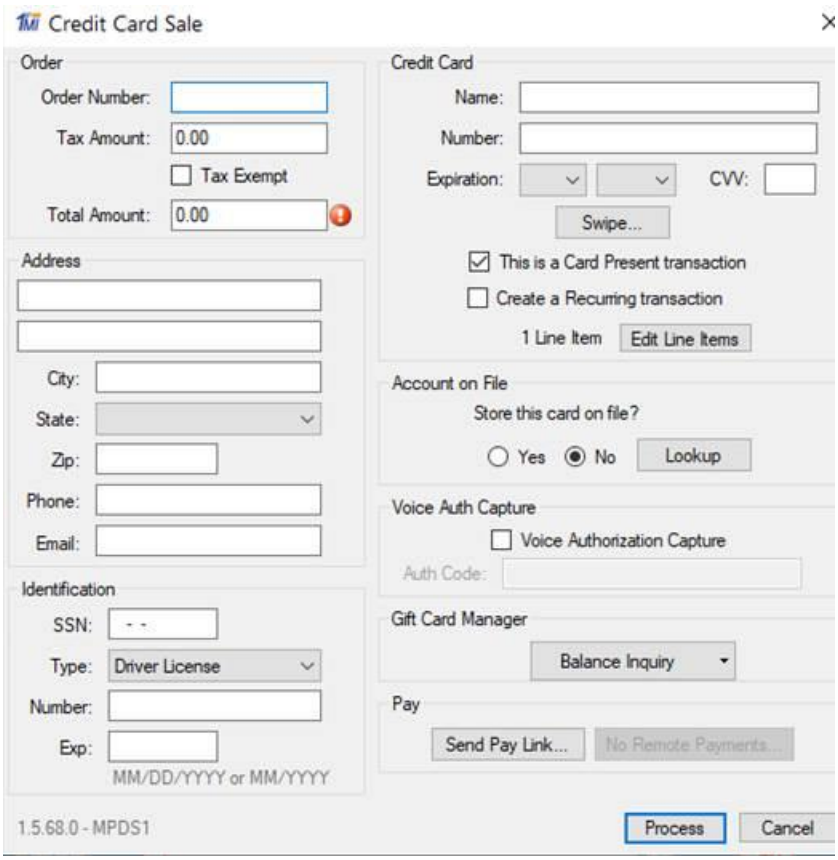
4. Fill out a bank deposit slip for cash (minus Ending Drawer amount) and checks

5. Insert the cash, checks, and deposit slips into the secure Night Drop deposit envelope.

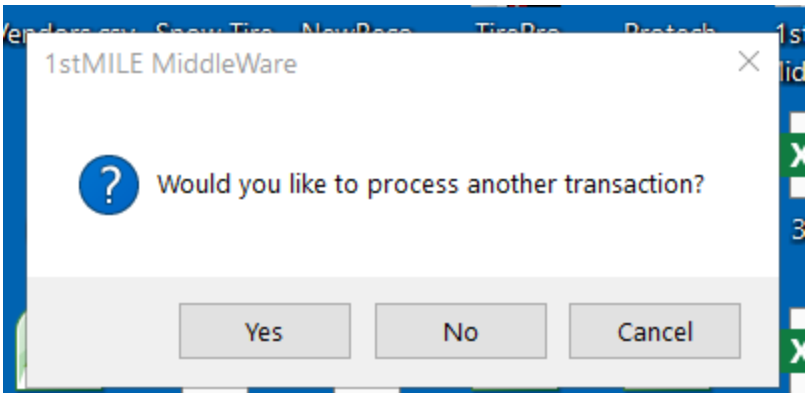
f. First Mile Close Process

Open First Mile Icon on the Desktop

This screen will pop up – Hit Cancel –

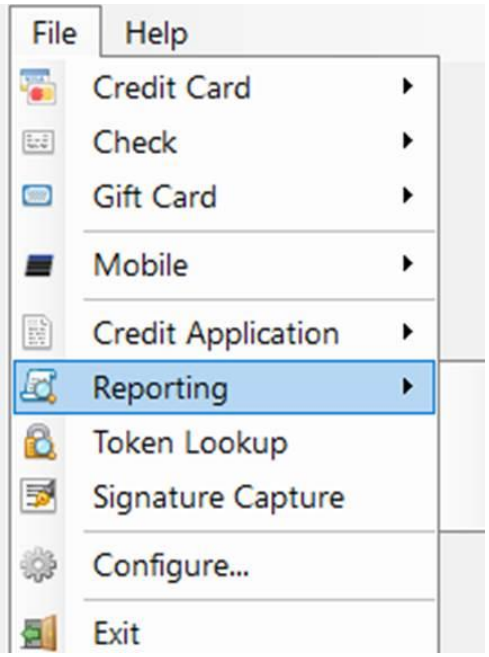


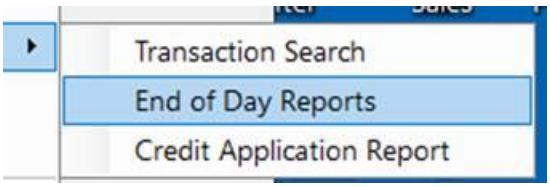
This screen will pop up – Hit Cancel



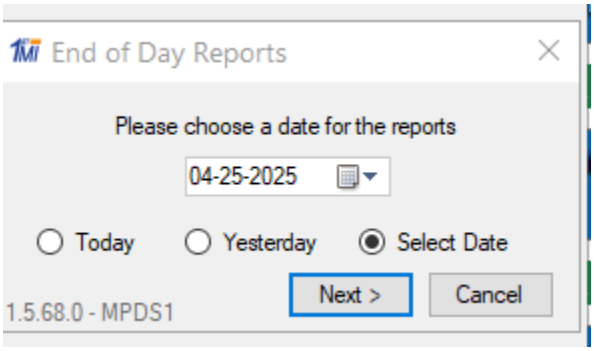
Go to >File > Reporting > End of day Reports

If End of Day Report is not an option choose Transaction Report

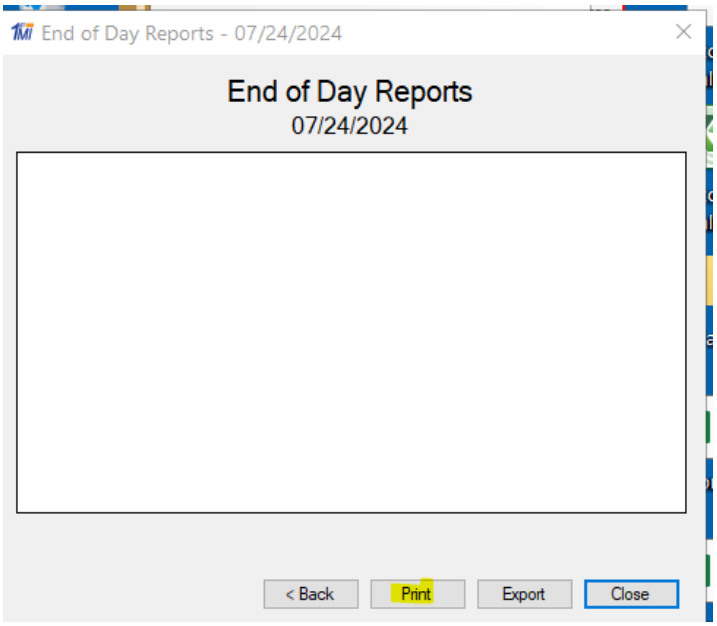




Select your Date



This will generate the report, and you can print it



g. Tire Connect EOD Procedure

Tire Connect orders will be received via the store's email inbox. To ensure all orders are properly accounted for during the daily closeout process, follow these instructions:

1. **Print All Tire Connect Orders Received**:
    - At the end of each day, print all Tire Connect orders received via email, regardless of whether they have been processed in Traction.
2. **Include Only Orders Needed to Balance the Till**:

- Review your till to identify any discrepancies.
- For orders that correlate to work orders in the system and are required to balance the till, include those printed orders in your daily closeout package.

3. **Store Unused Orders in the Till**:
   - If an order is not yet needed to balance the till or cannot be correlated to a work order in the system, keep it in the till until it is needed.
4. **Daily Closeout Package Requirements**:
   - Attach the relevant Tire Connect orders, credit card batch reports, bank receipts, and any other required documentation. Ensure that all totals match to avoid discrepancies.

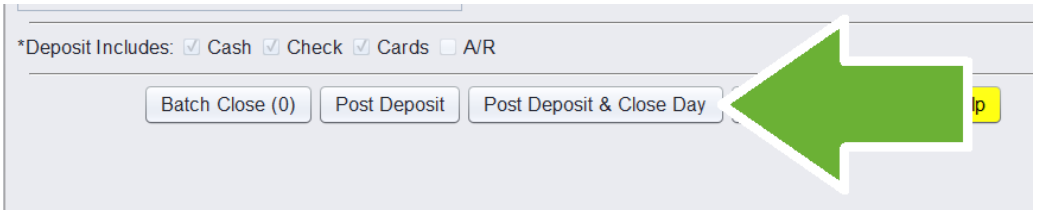
h. Finalize Batch tickets

This step is necessary to sync inventory data between HITS and RM Warehouse Management

1. From the **End Of Day** screen, click the **Batch Close** button.
2. This will take you to the screen to finalize all of your Batch Invoices.
3. Validate the summary total against the total in the Cash/Checks/CC report.
   a. Go to **Views** >> **Reports**>>**Cash/Check/CC**>>**Run Report**
4. Click the **Close** button, let the process run, and when complete, click **Return.**

i. Close Day in HITS

To finalize your day, click the **Post Deposit & Close Day** button, this will send your store's data to the NetSuite accounting system.
If you receive an error, please contact your Service Center Accountant (SCA)



j. Log out of HITS and other systems

For security purposes, log out of all apps, computers, and devices, turn them off or put them into Low Power/Sleep mode

k. Scan Daily Deposit Documents

Gills Daily Deposits – Daily Deposit Scans - **full scanning instructions located in the Miscellaneous section.

Daily scans should include:

- First Mile end of day report
- Hand-written deposit slips for cash and checks
- Any 3rd party funding authorization slips (Koalafi, Synchrony, CFNA, etc.)

Payment recap report Views>>Reports>>Recap and Summary>>Payment Recap

HP E52645 All-in-One Quick Guide

How to Use Quick Sets for Deposits and Invoices

1. Preparing Documents:
    - Place your document face-down on the scanner glass or face-up in the document feeder. Adjust paper guides to fit.
2. Accessing Quick Sets:
    - On the printer's Home Screen, tap the Quick Sets icon.
    - Choose the desired Quick Set: Gills Daily Deposit or Gills Invoices.
3. Gills Daily Deposit:
    - Insert your entire day's deposit paperwork into the scanner (ADF or flatbed).
    - Select Gills Daily Deposit Quick Set and hit Send.
    - For multiple pages, use the scan preview to add each page before sending.
    - No manual input needed—files are automatically named with date and time.
4. Gills Invoices:
    - Feed single-page invoices (up to 10–20 pages at a time) through the ADF.

- Select Gills Invoices Quick Set—each page will be saved as a separate file automatically.

5. Sending Documents:
   - Once your documents are ready, press Send to email them.

Note: The Gills Multi-Page Documents Quick Set is no longer available. Use the Invoices Quick Set for all invoice scanning.

l. Secure the Cash/Till Drawers

If you are not going to the bank en route home, then put the deposit envelope with the cash, checks, and deposit slip into the service center safe.

Put the till drawers into the Service Center safe and ensure that it is locked

m. Bank Deposit

You are required to deposit cash and checks at the bank at least three times per week. Daily is preferred.

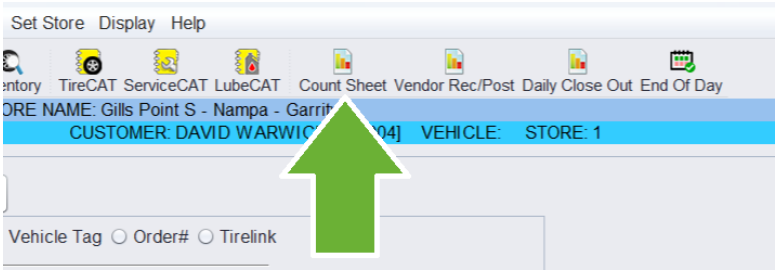
If you are going to the bank and using the bank Night Drop, then some best practices for doing so are:

- Choose well-lit locations for night deposit boxes.
    - Be mindful of your surroundings before approaching the night deposit box.
    - Only use the secure, tamper-evident deposit envelopes provided by the bank.
    - Follow scanning instructions (in the Miscellaneous section of this document) and add to OneDrive....:
        - the depository system's receipt
        - the completed bank deposit slip
        - the credit card report from the First Mile machine
        - EOD cash/check/cc screen from HITS
    - Avoid routine patterns when making night deposits.
    - Ensure that the chute is fully closed and locked before you walk away from the Night Drop box.

The issue	Where to get help
Error prevents completion of hard close	Contact the SCA
Vendor is not in the system	Use Brex card
GL account is missing	Contact SCA ASAP (escalation path is coming)
JEs are out of balance	Submit Hub ticket for HITS assistance
Customer related system issue	Submit a Hub ticket
Product code/pricing issues	Contact the SCA
Daily operational issues	Contact SCA or DM (depending on the issue)

15. Physical Inventory Count

The **Inventory Count Sheet** report can be found on the main toolbar by clicking Count Sheet.



There are no changes you need to make to the selections unless you are performing a cycle count on specific product type and need to only run the report for a single Department, such as “Tubes”.

Click **Run Report** to run the Count Sheet.

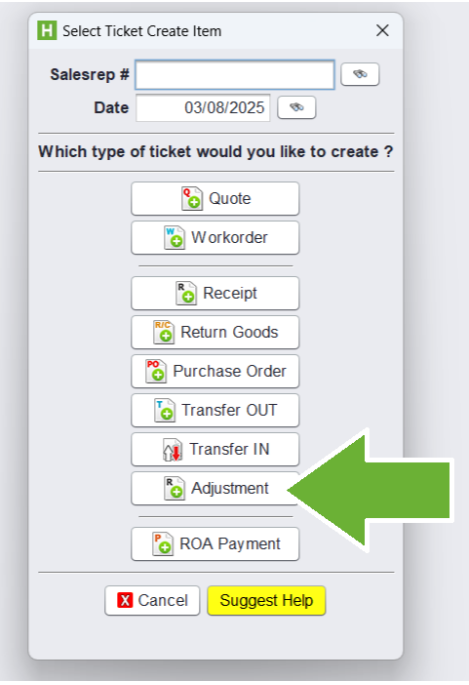
The report will provide totals for **True** count which reflect your inventory for all closed, finalized Invoices, as well as **Available** count which will reflect your inventory including any Workorder, Batch Invoice, Receipts, Returns, and Transfers.

Product #	Rawsize	Size	Description + Mfg#	Style	True	Count	WIP	RIP	TIP	OIP	Available
55 1252	33125022	33X12.50R22	TOYO OPEN COUNTRY		4						4
55 1257E	35125017	35X1250R17	A/T NITTO								
55 1257R	35125017	35X1250R17	A/T HERCULES		5						5
55 1258E	35125018	35X1250R18	A/T NITTO		16						16
55 1258R	35125018	35X1250R18	A/T HERCULES		4					4	4
55 1250E	35125020	35X1250R20	A/T NITTO					2			2
55 1250R	35125020	35X1250R20	A/T HERCULES		2			4			6

- **WIP** – Workorders In Process (and Batch Invoices)
- **RIP** – Receipts/ Returns In Process
- **TIP** – Transfers In Process
- **OIP** – Orders In Process (do not affect Available)

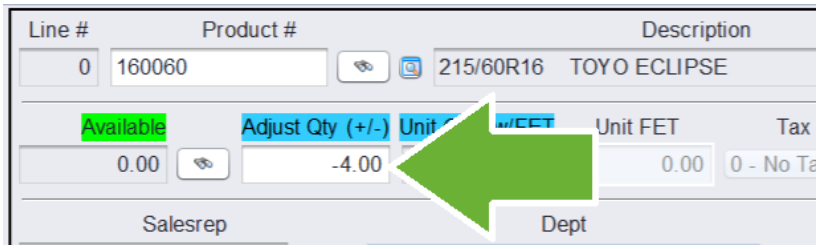
After performing your count and determining if the system accurately reflects your physical inventory, you may need to post an Inventory Adjustment in the system.

To post an Inventory Adjustment, click the **Create** button, then **Adjustment**.

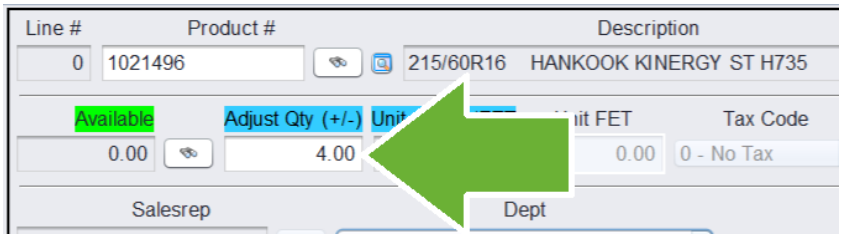


Enter any products that you are needing to adjust, and use **PLUS or MINUS** for the adjusting quantity.

For example: if you are *missing* 4 tires in inventory, you should post **MINUS 4** to decrease the count in the system.



For another example, if you found tires in your physical count that do not show in the system, you should post **4** to increase the count in the system.



Enter all products that need adjusting onto the adjustment ticket.

When complete click the **Close** button to finalize the adjustment.

16. Miscellaneous

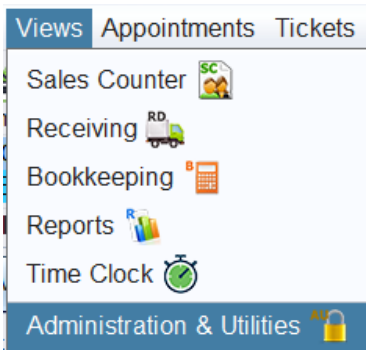
The following topics are miscellaneous how-tos.

a. Download Invoice Graphics

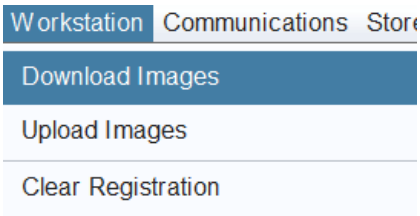
The logos and graphics that print on printed Quotes and Invoices will need to be downloaded to each workstation that prints.

To download images, go to:

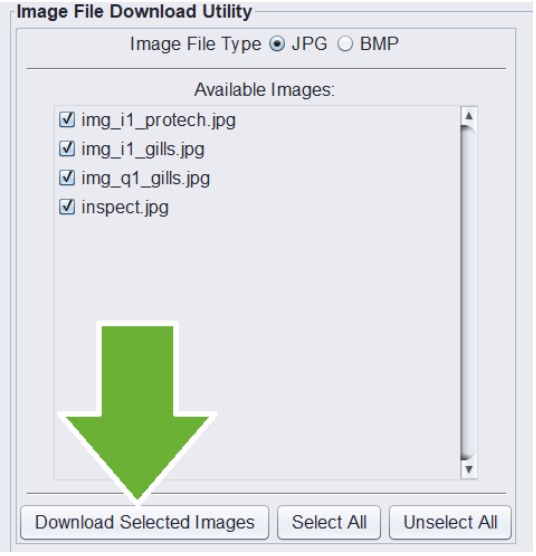
Views > Administration & Utilities



Workstation > Download Images



Ensure **ALL** checkboxes are selected and click **Download Selected Images**.



(actual options may differ in your system from the screenshot above).

After performing this download, printed Quotes and Invoices should contain the most recent graphics.

b. Scanning Instructions

WELCOME TO YOUR HP E52645 ALL-IN-ONE!

Below are the quick sets with a brief description of their purpose and how to utilize them.

Quick Sets

Gills Daily Deposits – Daily Deposit Scans

- NO LONGER REQUIRES any input by the individual – NO CHANGING DATES OR FILE NAMES
- Requires the use of the flatbed scanner (add multiple pages using the scan preview screen) or auto-document feed (ADF).
- All you need to do is put your SINGLE DAYs deposit paperwork in the ADF or flat bed, select the Gills Daily Deposit quick set, and hit send.
- The Gills Daily Deposit will now have all fields locked down like the invoices quick set. The system is programmed to automatically name the file using a date and time stamp.

**FILE NAME WILL LOOK LIKE THIS: STORE ###_DAILY DEPOSIT_11122025083400

Gills Invoices – Single Page Invoices

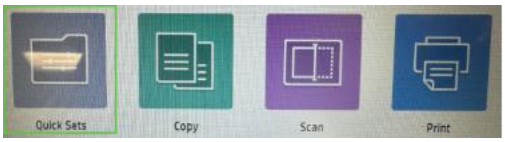
- Set does NOT require any adjustments or input by individual
- Set allows you to run multiple, invoices through the scanner and automatically creates individual files
- Documents can be fed using the auto-document feeder (ADF) on top of the scanner
- Recommend that you do not scan more than 10-20 pages at a time

Gills Multi-Page Documents – NO LONGER EXISTS. Run all invoice pages through the Invoices quick set.

SCAN DOCUMENTS:

1. On HP E52645, place the document face-down on the scanner glass, or put it face-up in the document feeder and adjust the paper guides to fit the document size.

2. From the Home Screen on the printer control panel, select the Quick Sets icon.



3. Select the Quick Set you wish to use: Gills Daily Deposit, or Gills Invoices.

4. When the document is ready, select Send to email it.

Example of Quick Set Use for Gills Daily Deposits:

Place your daily deposit face down on the scanner and close the lid. On the control panel, navigate to the Quick Sets. Load the Quick Set "Gills Daily Deposits." If you only have 1 page for the daily deposit, hit Send.

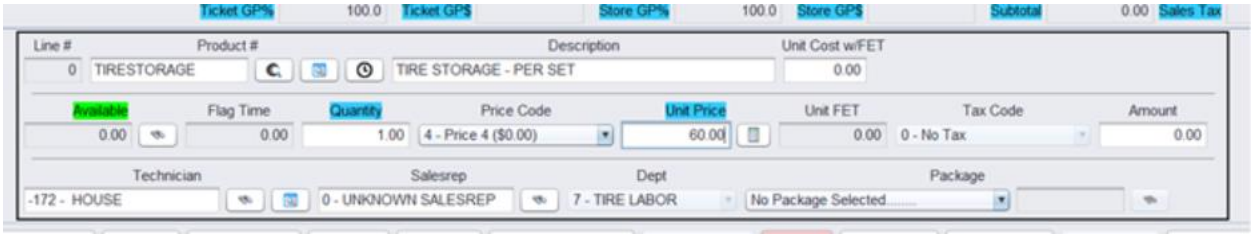
If you have more than one page, “Touch the scan and preview” option, then on the left side of the panel, select the double page with the + sign, then add the second page and scan. (Or if there are no staples, you can run the pages all together through the auto feeder)

After you have scanned all the pages, hit Send. Then, your daily deposit scan will contain all the pages in one file.

c. Tire Storage

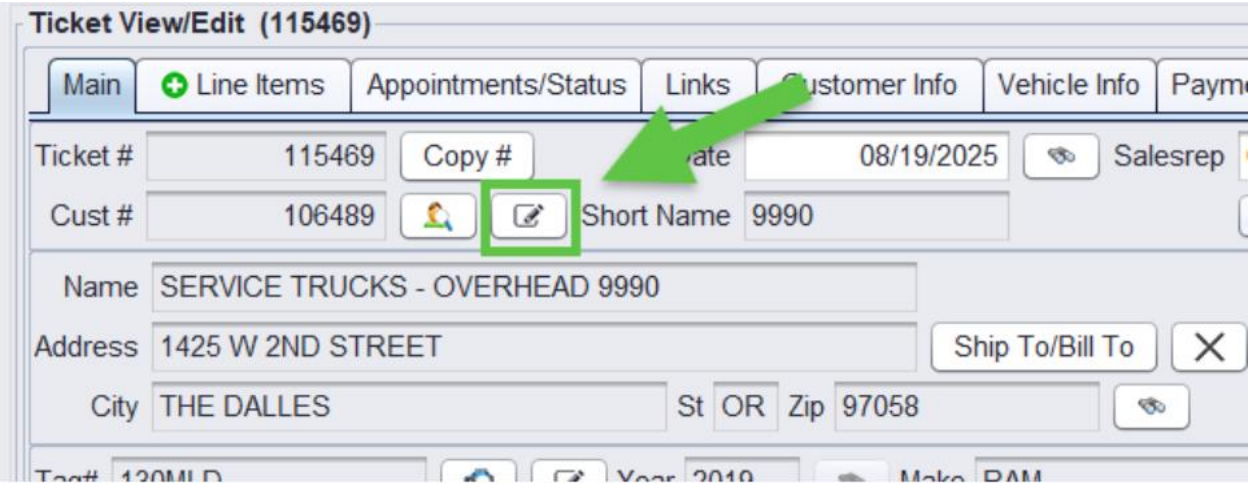
Adding Tire Storage to an Open Customer Ticket:

To store a customer's tire, add TIRESTORAGE to the product line. Also, Product # TIRESTORAGE is priced at $60 for bronze, $80 for Silver, and $100 for Gold per set. But the price field on the invoice is completely editable if your location charges more than the set amount.

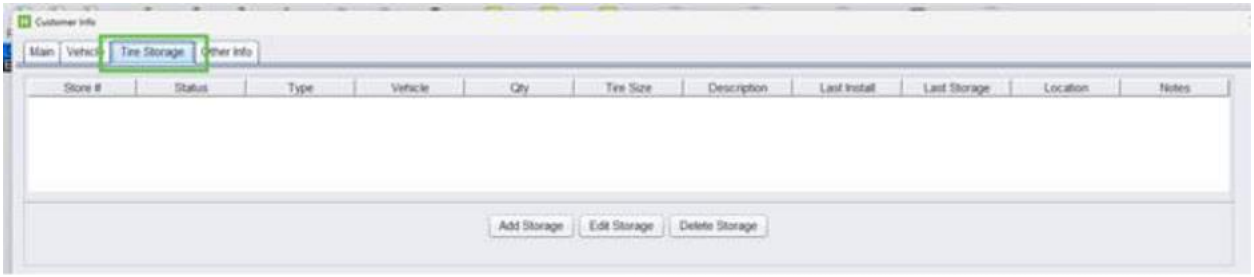


After you have added the line item, you will need to add the tire storage information to the Customer's Dashboard so you can locate and keep track of the tires for the next season.

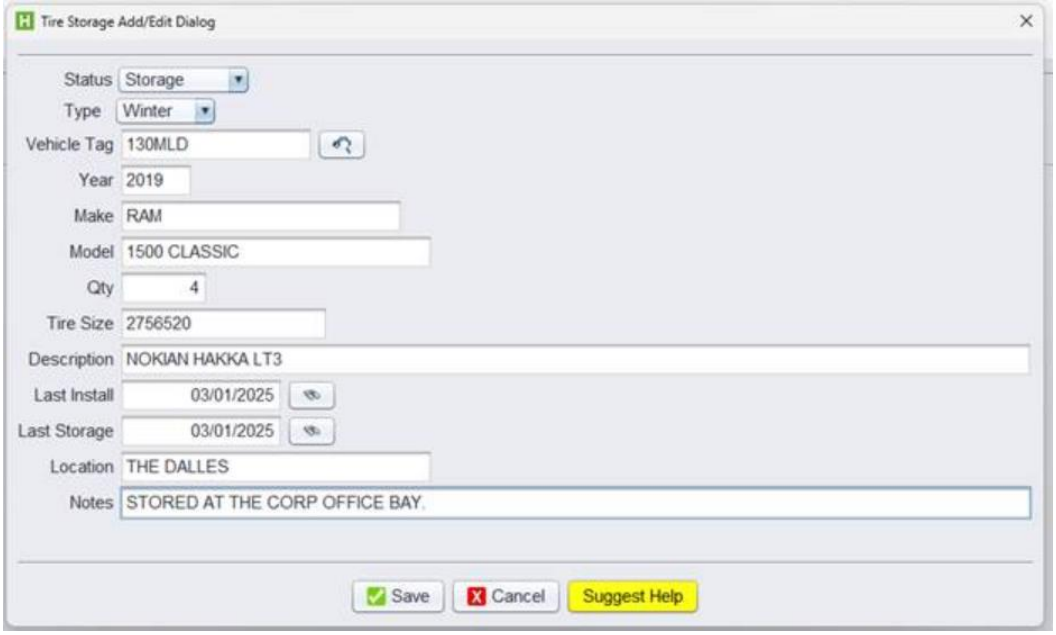
If you are still in the Customer's Ticket, you can access the Dashboard by clicking on the paper and pencil Icon next to the Cust # line.



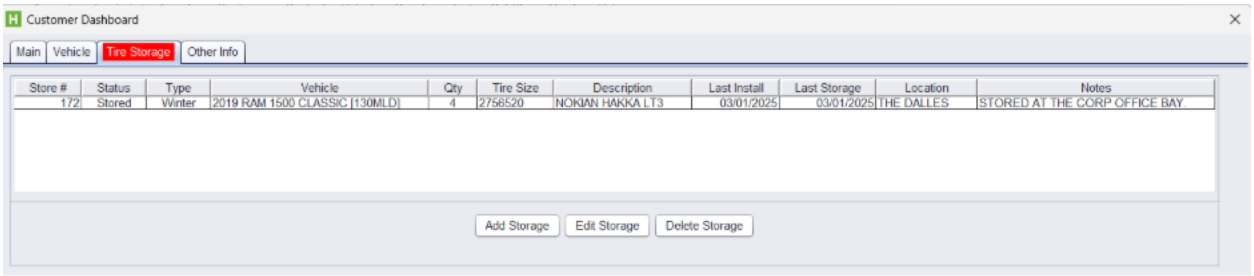
When on the customer's dashboard, click on Tire Storage and Add Storage:



You will get the Tire Storage Add/Edit Dialog box. Fill it in as much as possible.

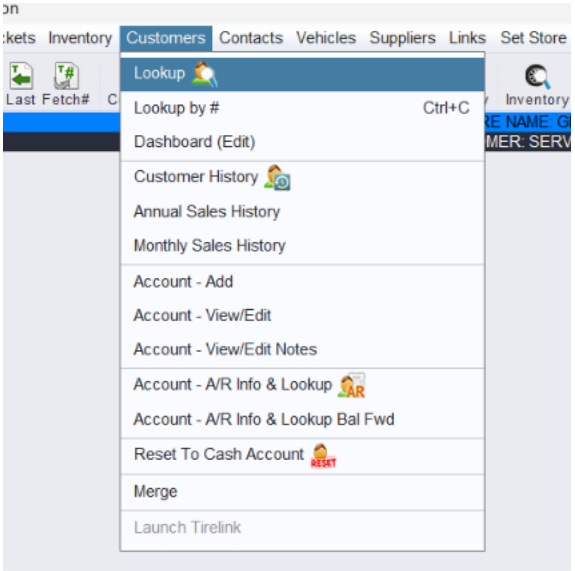


Once complete, select save and it should be displayed like below,

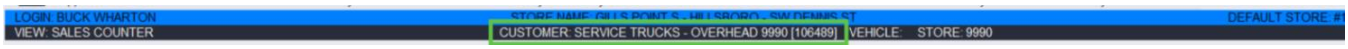


Adding Tire Storage by Accessing the Customer Dashboard:

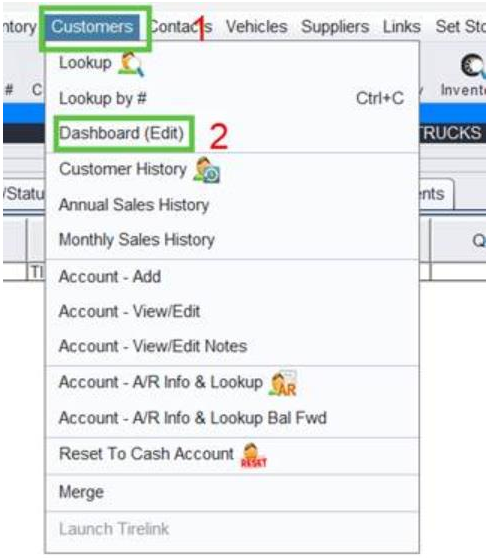
If you have closed the Ticket and need to access the Customer Dashboard at a later time, click on Customers, then look up.



Ensure that the customer you want to add tire storage to is displayed in the Header.



Click on Customers, then Dashboard (Edit).



Then follow the steps above to add the tires to storage.