



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.”

Each section below is hyperlinked. To be taken to the desired section, hover over the section and click on it when the cursor becomes a hand.

1. HITS Shop Suite	6
2. HITS Support	6
3. Login, Access, General.....	7
4. Sales Tickets (Workorders, Quotes, Batch, & Invoices)	10
5. Invoicing	15
a. Quotes and Workorders	15
Work Order Management Best Practices.....	25
b. Customers.....	26
c. Loyalty Program (BayIQ)	30
d. Vehicles.....	31
e. History.....	38
f. Ticket Notes & Comments	40
g. Products & Services	42
h. Setting Salesrep & Technician	60
i. Line items display	62
j. Declining Items	63
k. DOT #s.....	67
l. Discounts & Price Adjustments	68
m. First Mile/Paylink Payment Processing	75
n. Cashing Out / Closing Invoice.....	82
o. Advance Payment / Deposit.....	87
p. National Accounts.....	90
6. Refunds and other ticket functions.....	96
7. Appointments (and Autoflow appointment integration).....	98
8. Digital Inspections (by Autoflow).....	100
9. Receiving & Expenses	102

a. Inventory Receipts	103
b. Nonstock (Outside Part) Receipts	106
c. Posting Expenses	108
10. Managing Returns, Cores, & Credits	109
11. Transfers.....	116
12. Post and Distribute Received on Account Payments (ROA) for A/R customers	122
How to Print an ROA Receipt for a Customer	127
13. Reports	128
14. End Of Day Closing Process.....	129
a. Close registers once the shop is cleared of customers	130
b. Fuel and/or Towing	130
c. Verify the Customer Work Orders are Closed	130
d. Vendor Bill Reconciliation	130
e. Verify tender, drawer, and post deposit	134
f. First Mile Close Process.....	137
g. Tire Connect EOD Procedure	139
h. Finalize Batch tickets.....	140
i. Close Day in HITS	140
j. Log out of HITS and other systems	141
k. Scan Daily Deposit Documents.....	141
l. Secure the Cash/Till Drawers	142
m. Bank Deposit.....	142
15. Physical Inventory Count	143
16. Miscellaneous	146
a. Download Invoice Graphics.....	146
b. Scanning Instructions	147
c. Tire Storage.....	149

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:

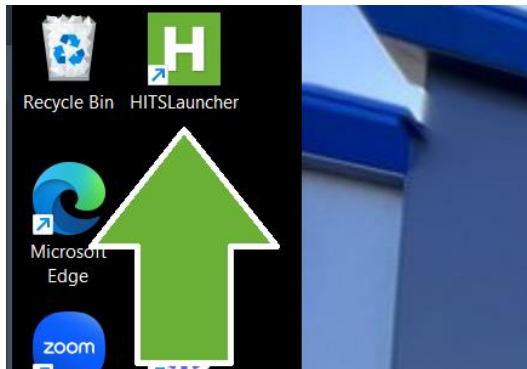
- Submit a ticket at: thehub.gillstire.com , OR
- Email: help@gillstire.com

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.

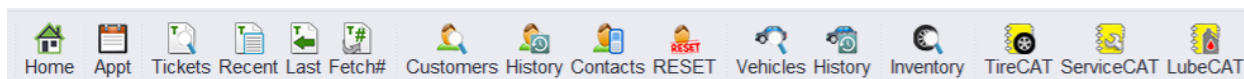
A screenshot of the 'HITS Point-Of-Sale Launcher v1.25' application window. The window has a title bar with a green 'H' icon and standard Windows window controls. The main area is titled 'Login Info' and contains three input fields: 'Account#' with the value '44000', 'Username' with the value 'BILL BAKER', and 'Password' with masked characters '*****'. To the right of the password field is an eye icon. Below the input fields are four checkboxes: 'Full Reload' (unchecked), 'Quick Reload' (unchecked), 'Save Password' (checked), and 'Do Not Exit After Launch' (checked). At the bottom are two buttons: 'Close HITS' and 'Launch HITS'. A green status bar at the very bottom of the window displays the text 'Connected to Login Server GO2HITS.COM'.

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

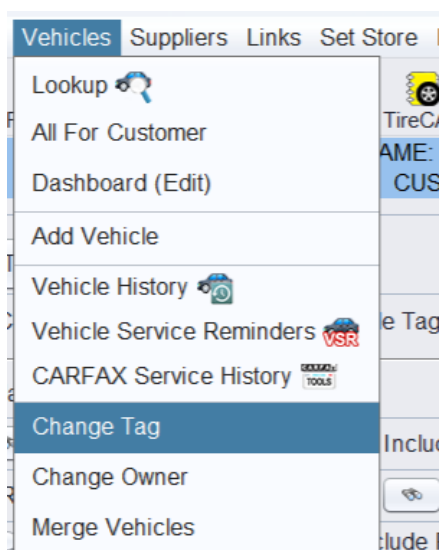
A close-up screenshot of the 'Do Not Exit After Launch' checkbox, which is checked and highlighted with a light gray background.

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.

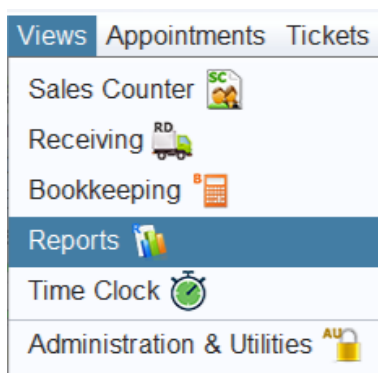
Most commonly used functions can be accessed from the main **toolbar** in the application. Over time, you may notice new functions being added to the toolbar.



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

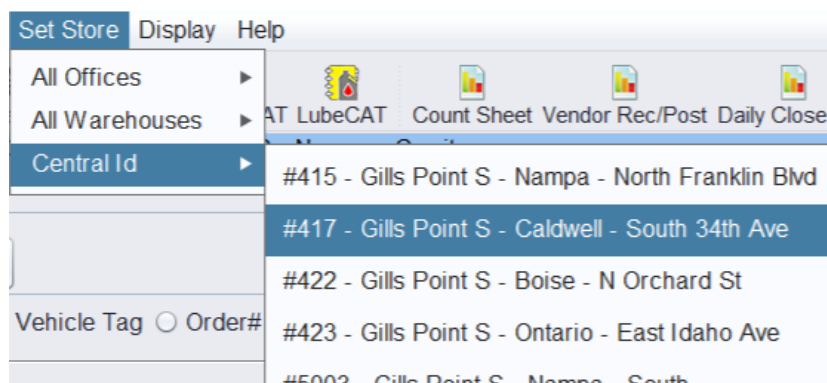


HITS contains different “views” for the various modules in the system, you may not use all modules or may not have permission to access certain modules or functions.

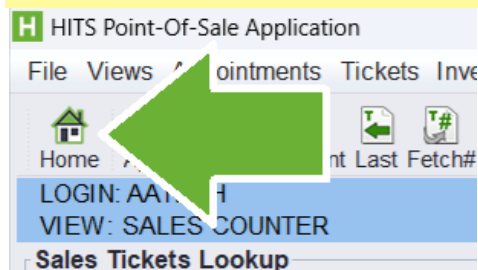


HITS is a **permission-based system** so there may be functions that only a Store Manager, District Manager, or Corporate Accountant can perform in HITS.

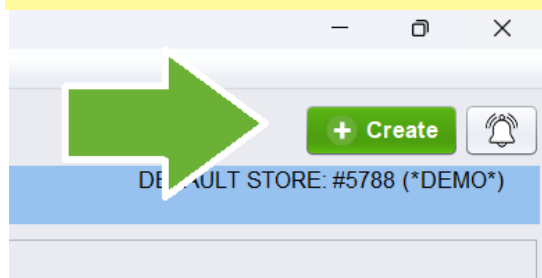
Some users will be able to access other locations in the HITS system. Other users will only be able to access their store. Users who can access more than one store will see the **Set Store** menu and can change their logged in store, by selecting the appropriate store.



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.

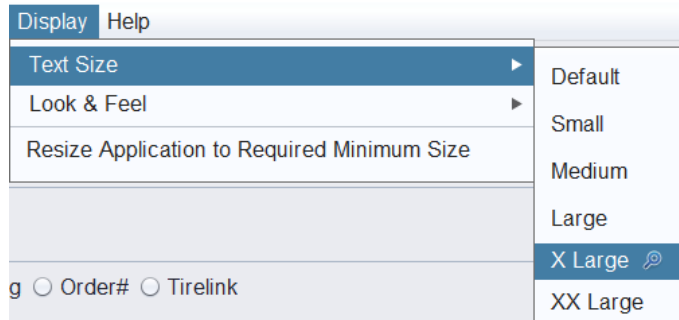


Additionally, any transaction type can be created by clicking the **Create** button (upper-right corner).



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.

Sales Tickets Lookup

Lookup:
☒ All ☐ Ticket# ☐ Customer# ☐ Short Name ☐ Vehicle Tag ☐ Order#

Ticket Types: ☐ All ☐ Quote ☒ Workorder ☒ Invoice ☐ Nat Acct ☐ All

Dates: Today From: 03/08/2025 To: 03/08/2025 ☐ Include Carryovers

Store# Store 59 ALL SALESREPS Route# Status All Print All

☒ Exact Match ☐ Max Results 100 ☐ Display View ☒ Retail ☐ Wholesale ☐ Stats Options: ☒ Include FET ☐ Include Sales Tax ☐ Disable Tooltips

*** 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

ST#	Ticket #	Type	NAT	A	SR#	Cust #	Short Name	Name	Note	Tag#	Year	Make	Model	Vehicle Status	Date	Total
59	5907576	Invoice			S	5908612	OLUGBEMI	AYOOLA OLUGBEMI	needs front passage	IYG378	2006	TOYOTA	HIGHLANDER		03/08/2025	629.74
59	5907577	Workorder			S	5909927	HARRISON	CORETTA HARRISON	customer filled out	VRR4699	2020	KIA	SPORTAGE		03/08/2025	118.75
59	5907578	Workorder			S	5902592	BATTLE	JOSSELYN BATTLE	est customer bring o	NYJ7376	2018	HONDA	CIVIC		03/08/2025	1131.91
59	5907579	Workorder			S	5904045	GRAHM	TACORA GRAHM	customer filled out	NGV3126	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	5907581	Invoice			S	5904770	MORRIS	DOUG MORRIS		JMK1631	2014	FORD TRUCKS	F150 PICKUP		03/08/2025	24.96
59	5907582	Workorder			S	1200002	TEMPCUST	TEMPORARY CUSTOMER	brough own oil only	SLY2128	2008	PONTIAC	TORRENT		03/08/2025	32.50
59	5907583	Invoice			S	5906665	ANEZ	YUBISAY H ANEZ		TMH4404	2013	HYUNDAI	SANTA FE		03/08/2025	119.08

☐ Indicates Tickets Which Are Carryovers ☐ Ticket is ready ☐ Ticket has been printed

The Sales Ticket Lookup also has **other filters** such as 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			2	18817	ELLIE	ELLIE							11/17/2025		1113.60
971	-7418039	Quote			2	1329255	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	-7417687	Quote			1	1329110	ARNOLD	MATTHEW ARNOLD							11/17/2025		938.29
971	-7417654	Quote			2	18491	ROBBINS	JIM ROBBINS							11/17/2025		1997.16
971	-7418205	Quote			1	1329666	HAYES	JODY HAYES							11/18/2025		1048.03
971	2611550	Workorder			1	1329119	RIVARD	CHRIS RIVARD		6X3117	2023	RIVIAN	R1S		11/18/2025		0.00
971	2672940	Workorder			1	16444	HO	MATTHEW HO	APPT 11/18/25	KXF367	2025	SUBARU	CROSSTREK		11/18/2025		894.00
971	2699450	Workorder			1	1331047	PALMERI	RICH PALMERI	APPT 11/25/25						11/18/2025		970.50
971	2725355	Workorder			1	1602832	PHILLIPS	KYLE PHILLIPS	APPT 11/18/25	KAY489	2018	JEEP	GRAND CHEROKEE		11/18/2025		1256.08
971	2769001	Workorder			2	1597558	JETTIE	BEN JETTIE	APPT 12/3						11/18/2025		903.08
971	2779311	Workorder			1	1328870	COOPER MEC	COOPER MECHANICAL		519A389	2023	FORD	TRANSIT-350 HD		11/18/2025		180.00
971	277549	Workorder			2	1329948	SMITH	BRAN SMITH		GWV518	2012	TOYOTA	PROUS		11/18/2025		136.40
971	2772533	Workorder			1	1297575	CRW CORPOR	CRW CORPORATION		NO TAG-51052	2020	VOLVO	X260		11/18/2025		1203.74
971	277978	Workorder			2	188761	USHAKOVA	KRISTINA USHAKOVA		KCD448	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 WHE
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	EELS	CAMERON EELS	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.

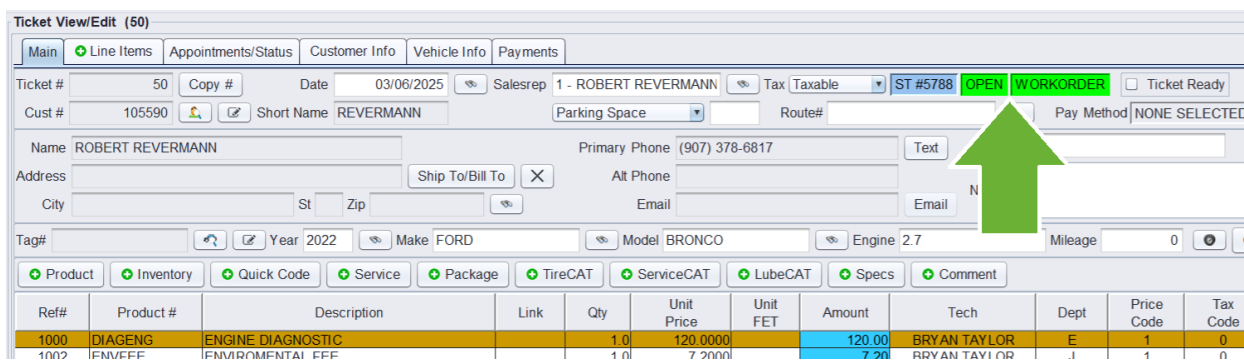
Sales Tickets Lookup More GP Data											
Ticket #	Salesrep	Goods	Goods C	\$	Goods GP%	Service	Service Cost	Service GP\$	Service GP%	Total GP\$	Total GP% ▲
5907579	SIDNEY A	46.99	36.6	10.38	22.1	-4.50	-0.01	-4.49	99.8	5.89	13.9
5907581	SIDNEY A	17.98	13.91	4.07	22.6	5.50	-0.01	5.51	100.2	9.58	40.8
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:



Ticket View/Edit (50)

Main | Line Items | Appointments/Status | Customer Info | Vehicle Info | Payments

Ticket # 50 Copy # Date 03/06/2025 Salesrep 1 - ROBERT REVERMANN Tax Taxable ST #5788 **OPEN** WORKORDER Ticket Ready

Cust # 105590 Short Name REVERMANN Parking Space Route# Pay Method NONE SELECTED

Name ROBERT REVERMANN Primary Phone (907) 378-6817 Text

Address Ship To/Bill To X Alt Phone

City St Zip Email

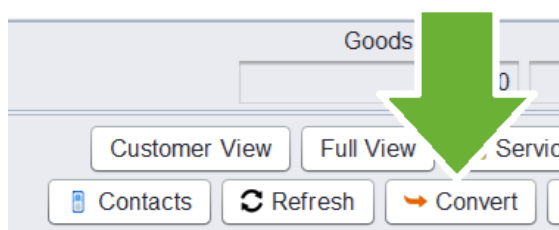
Tag# Year 2022 Make FORD Model BRONCO Engine 2.7 Mileage 0

Product Inventory Quick Code Service Package TireCAT ServiceCAT LubeCAT Specs Comment

Ref#	Product #	Description	Link	Qty	Unit Price	Unit FET	Amount	Tech	Dept	Price Code	Tax Code
1000	DIAGENG	ENGINE DIAGNOSTIC		1.0	120.0000		120.00	BRYAN TAYLOR	E	1	0
1002	ENV/FFF	ENVIRONMENTAL FFF		1.0	7.2000		7.20	BRYAN TAYLOR	J	1	0

- **Quotes** are OPEN tickets that can be provided to the customer for pricing. Products on Quotes do not allocate 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.



Goods

Customer View Full View Service

Contacts Refresh Convert

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.

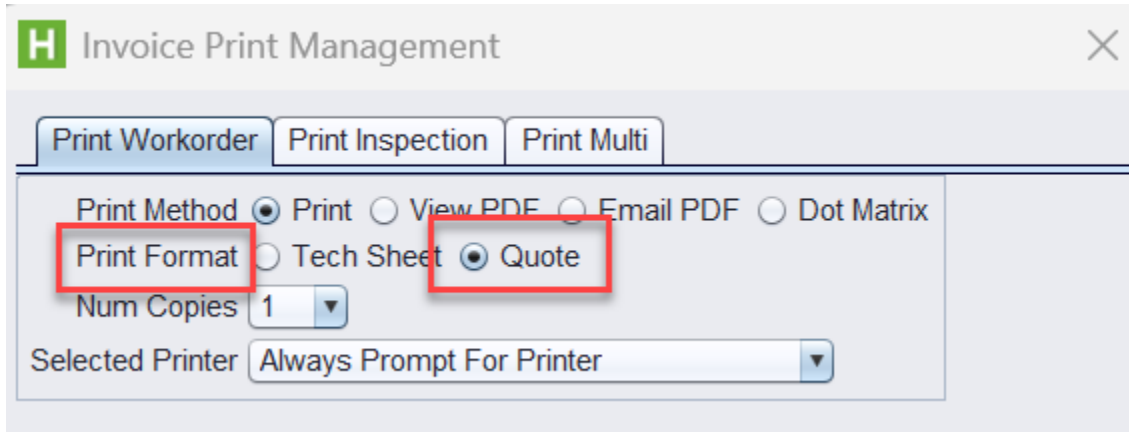
When placing electronic orders through the system, the Workorder # will be used automatically as the PO#. The Workorder # will stay the same ticket number as the finalized Invoice.

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	appling 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."



H Invoice Print Management

Print Workorder | Print Inspection | Print Multi

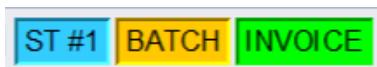
Print Method ☒ Print ☐ View PDF ☐ Email PDF ☐ Dot Matrix

Print Format ☐ Tech Sheet ☒ Quote

Num Copies 1

Selected Printer Always Prompt For Printer

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

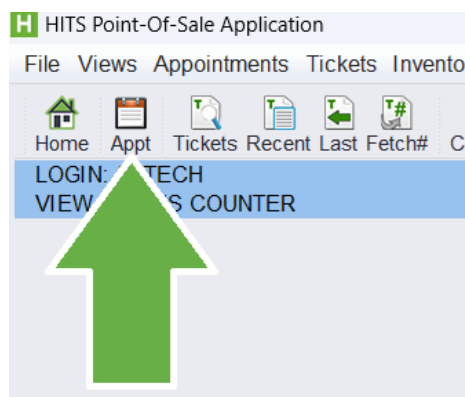
There are three primary retail customer sales interactions in a Service Center:

- **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]*?**

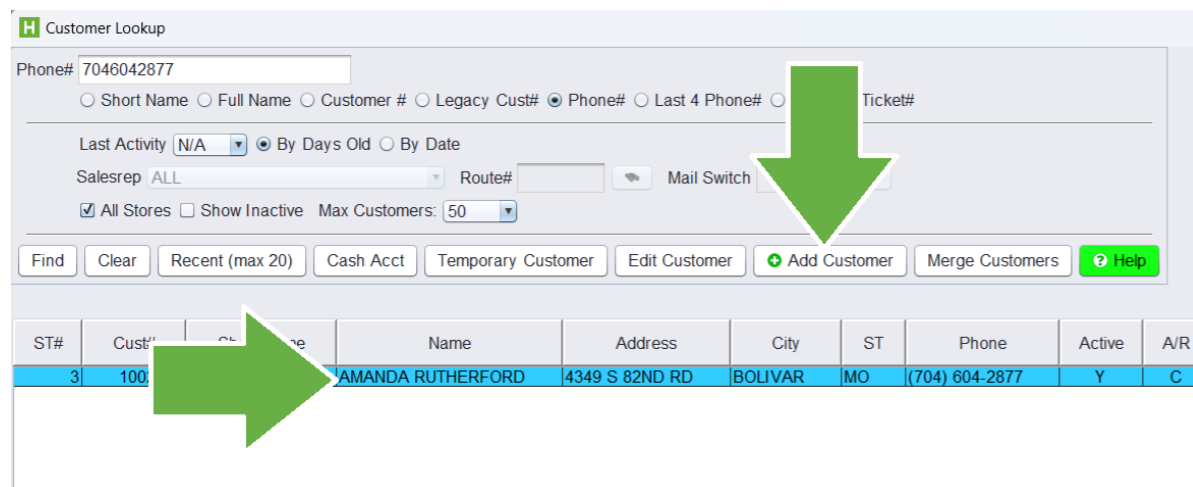
If the customer has booked an appointment online and the appointment was added correctly into HITS, go the **Appointment (Appt)** icon on the toolbar.



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).



Customer Lookup

Phone# 7046042877

☐ Short Name
 ☐ Full Name
 ☐ Customer #
 ☐ Legacy Cust#
 ☒ Phone#
 ☐ Last 4 Phone#
 ☐ Ticket#

Last Activity N/A ☒ By Days Old ☐ By Date

Salesrep ALL Route# Mail Switch ☐

☒ All Stores ☐ Show Inactive Max Customers: 50

Find Clear Recent (max 20) Cash Acct Temporary Customer Edit Customer Add Customer Merge Customers Help

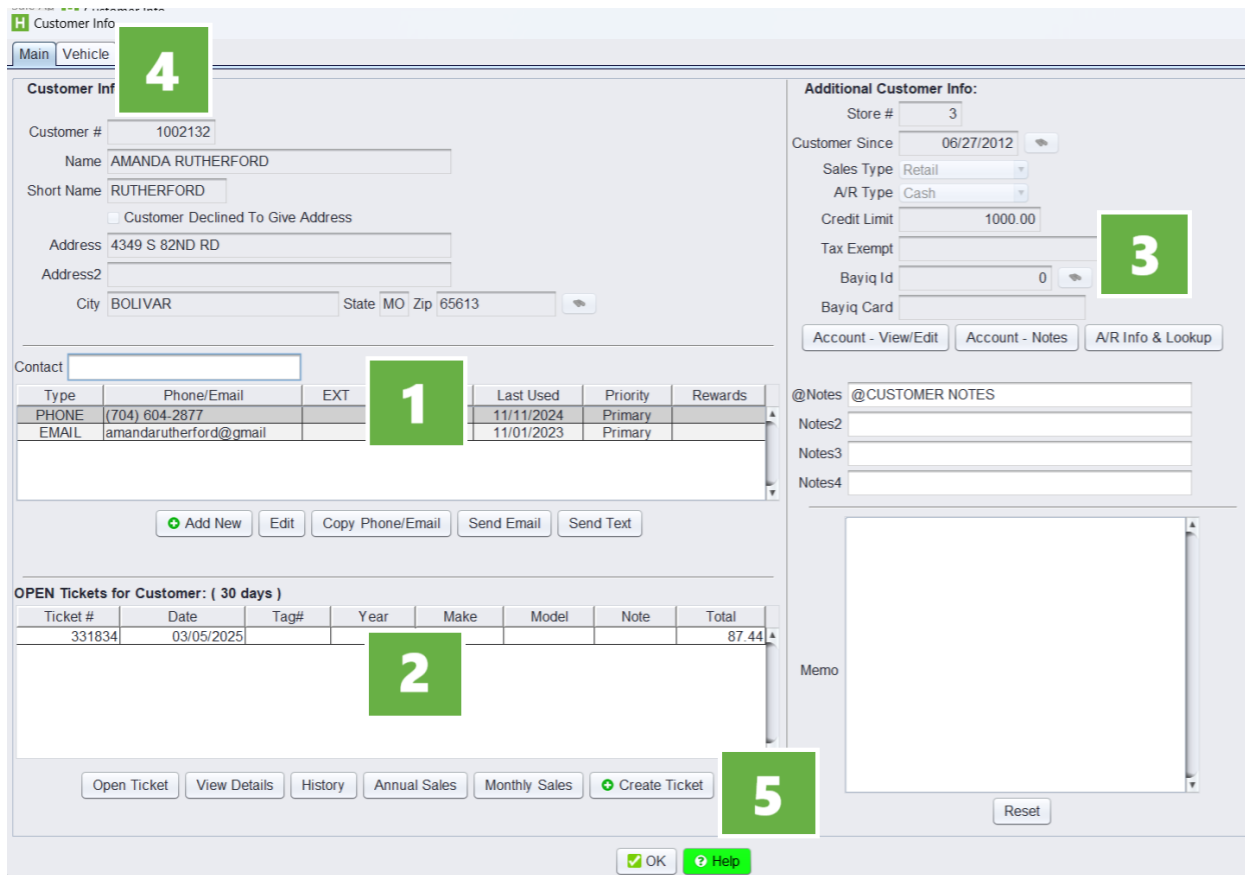
ST#	Cust#	Name	Address	City	ST	Phone	Active	A/R
3	100	AMANDA RUTHERFORD	4349 S 82ND RD	BOLIVAR	MO	(704) 604-2877	Y	C

>>> 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



The screenshot shows the 'Customer Info' form in the GILLS Shop Suite. The form is divided into several sections:

- Customer Info:** Contains fields for Customer # (1002132), Name (AMANDA RUTHERFORD), Short Name (RUTHERFORD), Address (4349 S 82ND RD), City (BOLIVAR), State (MO), and Zip (65613). A green box with the number 4 is placed over the 'Main' tab.
- Additional Customer Info:** Contains fields for Store # (3), Customer Since (06/27/2012), Sales Type (Retail), A/R Type (Cash), Credit Limit (1000.00), Tax Exempt, Bayiq Id (0), and Bayiq Card. A green box with the number 3 is placed over the Bayiq Id field.
- Contact:** A table with columns: Type, Phone/Email, EXT, Last Used, Priority, and Rewards. It lists two contacts: PHONE (704) 604-2877 and EMAIL amandarutherford@gmail. A green box with the number 1 is placed over the table.
- OPEN Tickets for Customer: (30 days)**: A table with columns: Ticket #, Date, Tag#, Year, Make, Model, Note, and Total. It shows one ticket with Ticket # 331834, Date 03/05/2025, and Total 87.44. A green box with the number 2 is placed over the table.
- Buttons:** At the bottom of the form are buttons for 'Add New', 'Edit', 'Copy Phone/Email', 'Send Email', 'Send Text', 'Open Ticket', 'View Details', 'History', 'Annual Sales', 'Monthly Sales', 'Create Ticket', 'OK', and 'Help'. A green box with the number 5 is placed over the 'Create Ticket' button.
- Notes:** A section for notes with fields for @Notes, @CUSTOMER NOTES, Notes2, Notes3, and Notes4.
- Memo:** A large text area for a memo.

>>> 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.

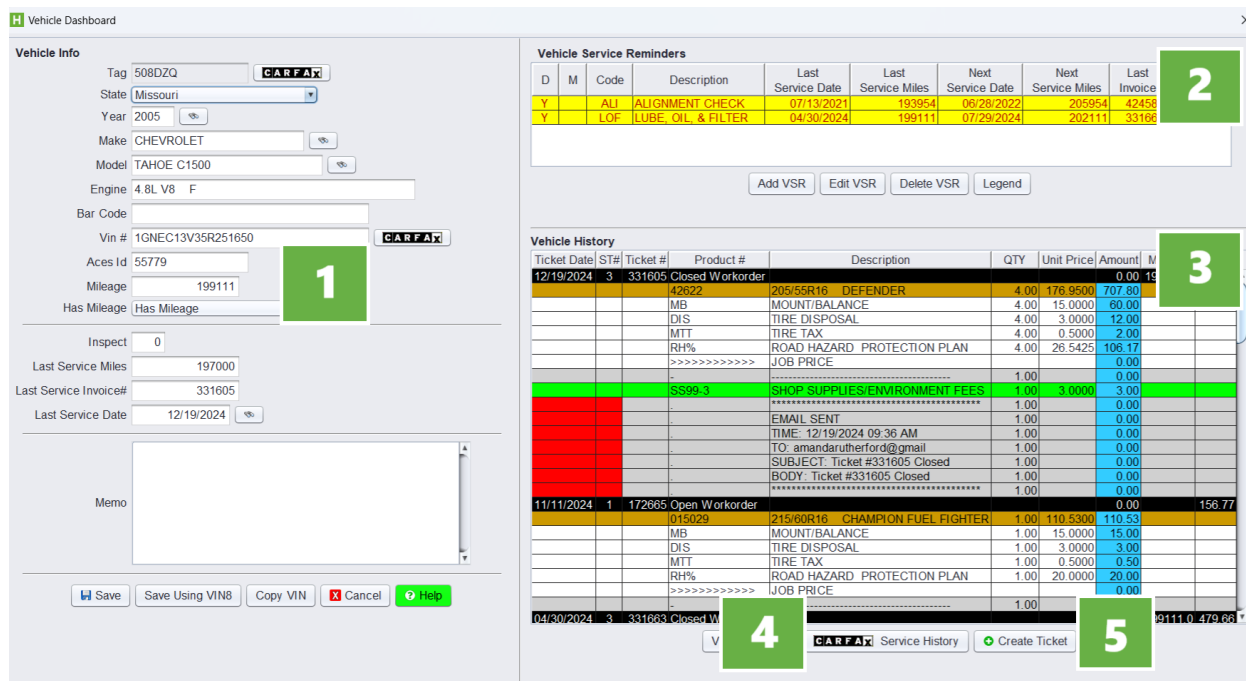
From here you can click on a vehicle already in the system or click to **Add Vehicle**.

.....

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



Vehicle Dashboard

Vehicle Info

Tag: 508DZQ **CARFAX**

State: Missouri

Year: 2005

Make: CHEVROLET

Model: TAHOE C1500

Engine: 4.8L V8 F

Bar Code:

Vin #: 1GNEC13V35R251650 **CARFAX**

Aces Id: 55779

Mileage: 199111

Has Mileage: Has Mileage

Inspect: 0

Last Service Miles: 197000

Last Service Invoice#: 331605

Last Service Date: 12/19/2024

Memo:

Save Save Using VIN8 Copy VIN Cancel Help

Vehicle Service Reminders

D	M	Code	Description	Last Service Date	Last Service Miles	Next Service Date	Next Service Miles	Last Invoice
Y		ALI	ALIGNMENT CHECK	07/13/2021	193954	06/28/2022	205954	42458
Y		LOF	LUBE, OIL, & FILTER	04/30/2024	199111	07/29/2024	202111	33168

Add VSR Edit VSR Delete VSR Legend

Vehicle History

Ticket Date	ST#	Ticket #	Product #	Description	QTY	Unit Price	Amount	M
12/19/2024	3	331605	Closed Workorder				0.00	15
		42622	205/55R16 DEFENDER		4.00	178.9500	707.80	
		MB	MOUNT/BALANCE		4.00	15.0000	60.00	
		DIS	TIRE DISPOSAL		4.00	3.0000	12.00	
		MTT	TIRE TAX		4.00	0.5000	2.00	
		RH%	ROAD HAZARD PROTECTION PLAN		4.00	26.5425	106.17	
		>>>>>>>>>>	JOB PRICE				0.00	
					1.00		0.00	
		SS99.3	SHOP SUPPLIES/ENVIRONMENT FEES		1.00	3.0000	3.00	
					1.00		0.00	
			EMAIL SENT		1.00		0.00	
			TIME: 12/19/2024 09:36 AM		1.00		0.00	
			TO: amandarutherford@gmail		1.00		0.00	
			SUBJECT: Ticket #331605 Closed		1.00		0.00	
			BODY: Ticket #331605 Closed		1.00		0.00	
					1.00		0.00	
11/11/2024	1	172665	Open Workorder				0.00	156.77
		015029	215/60R16 CHAMPION FUEL FIGHTER		1.00	110.5300	110.53	
		MB	MOUNT/BALANCE		1.00	15.0000	15.00	
		DIS	TIRE DISPOSAL		1.00	3.0000	3.00	
		MTT	TIRE TAX		1.00	0.5000	0.50	
		RH%	ROAD HAZARD PROTECTION PLAN		1.00	20.0000	20.00	
		>>>>>>>>>>	JOB PRICE				0.00	
					1.00		0.00	
04/30/2024	3	331663	Closed W				3111.0	479.66

V **CARFAX** Service History Create Ticket

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.

Select Ticket Create Item

Salesrep #

Date 03/06/2025

Which type of ticket would you like to create ?

Quote

Workorder

ROA Payment

Cancel Suggest Help

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

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

Pkg 1	Pkg 2	Pkg 3	Pkg 4
453.43	369.43	351.91	425.56
557.80	473.80	456.28	529.93
632.95	548.05	521.42	605.08
683.05			
800.02			
904.68			

Quick Detail...

Create Workorder/Quote...

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

Appts	Appt Date	Appt Time	Ticket#
SUN 03/09			
7:00 AM			
7:30 AM			
8:00 AM			
8:30 AM			
9:00 AM			
9:30 AM			
10:00 AM			
10:30 AM			
11:00 AM			
11:30 AM			
12:00 PM			
12:30 PM			
1:00 PM			
1:30 PM			
2:00 PM			
2:30 PM			
3:00 PM			

Edit Appointment...
Edit Appointment For Last...
Quick View...
Show Vehicle...
Text Customer...
Create New Ticket...

TireCAT (TireConnect) > Add To Ticket

SINCERA SN250 A/S
TOURING ALL SEASON 215/60R16/SL 95T MPN # 28294479

WARRANTY: **80000** MI

QTY: **4**

PER TIRE: **\$118.99**
Set of 4: \$475.96

[ORDER THIS TIRE](#)

TIRES

> [Falken Sincera SN250 A/S](#) Qty: 4 \$475.96

REQUIREMENTS

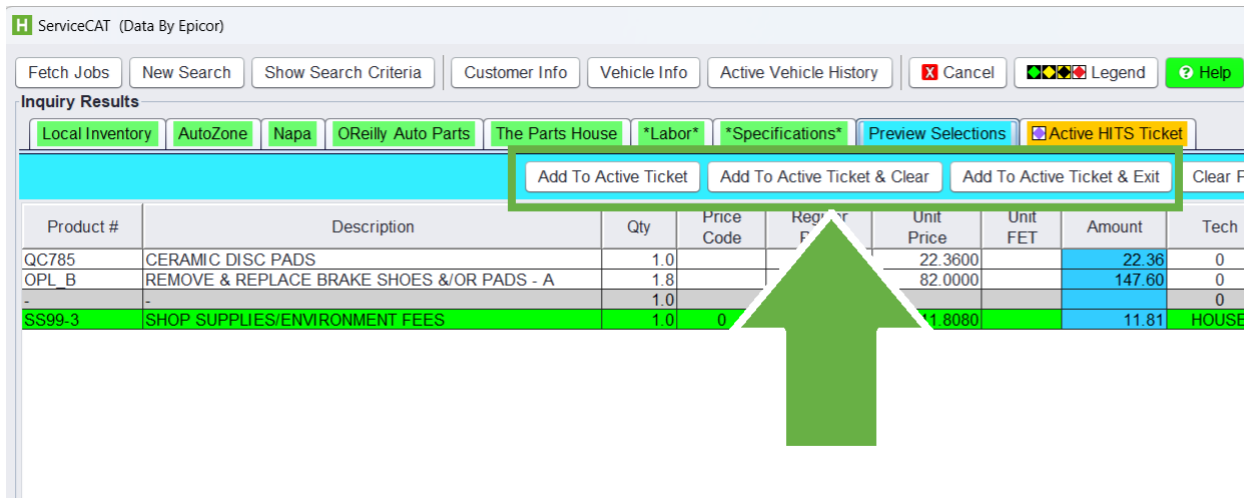
> [Install](#) \$87.96

[ADD CUSTOM SERVICE](#)

[Add To Ticket](#)
[Save Session & Return](#)
[Cancel](#)
[Suggest Help](#)

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



ServiceCAT (Data By Epicor)

Fetch Jobs New Search Show Search Criteria Customer Info Vehicle Info Active Vehicle History Cancel Legend Help

Inquiry Results

Local Inventory AutoZone Napa O'Reilly Auto Parts The Parts House *Labor* *Specifications* Preview Selections Active HITS Ticket

Add To Active Ticket Add To Active Ticket & Clear Add To Active Ticket & Exit Clear F

Product #	Description	Qty	Price Code	Reg. F.	Unit Price	Unit FET	Amount	Tech
QC785	CERAMIC DISC PADS	1.0			22.3600		22.36	0
OPL_B	REMOVE & REPLACE BRAKE SHOES &/OR PADS - A	1.8			82.0000		147.60	0
-	-	1.0						0
SS99.3	SHOP SUPPLIES/ENVIRONMENT FEES	1.0	0		11.8060		11.81	HOUSE

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.

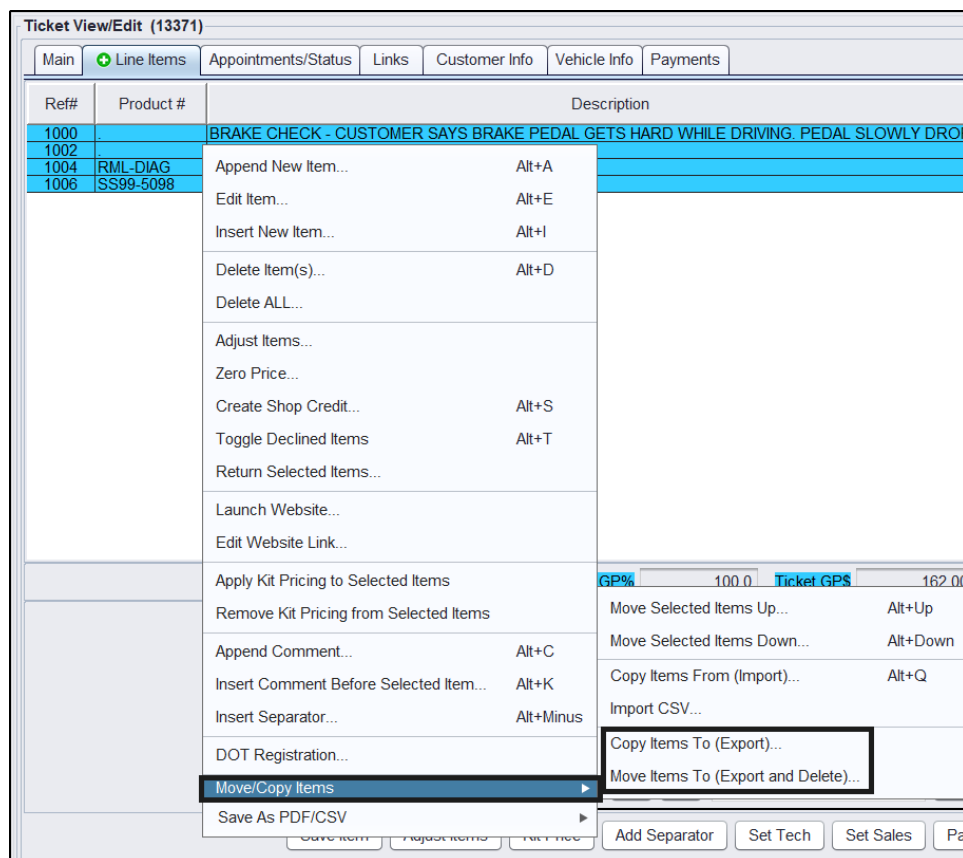
Converting a Workorder Back Into a Quote

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

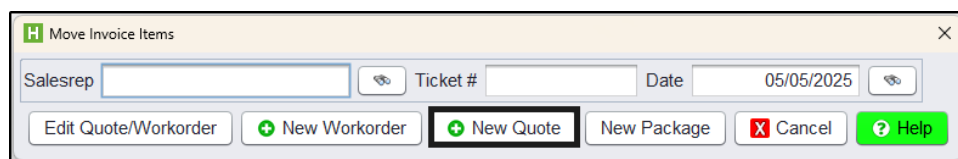
Currently, if you need to change a workorder back into a quote, you would need to take the steps below to move the line-items from the open workorder to a **new Quote** in HITS:

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)...**

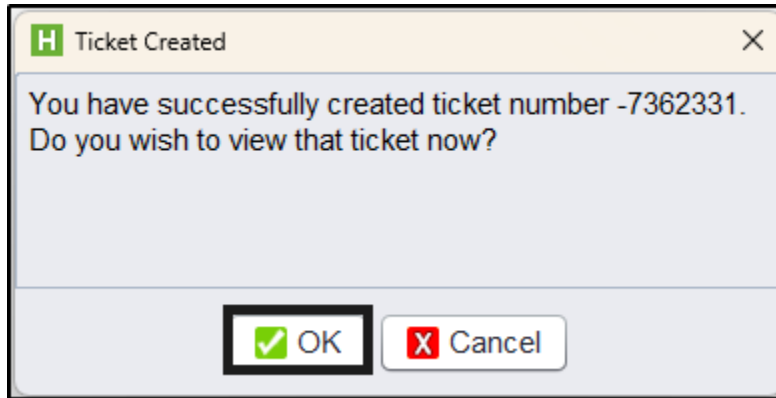


5. Click the **New Quote** button



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.

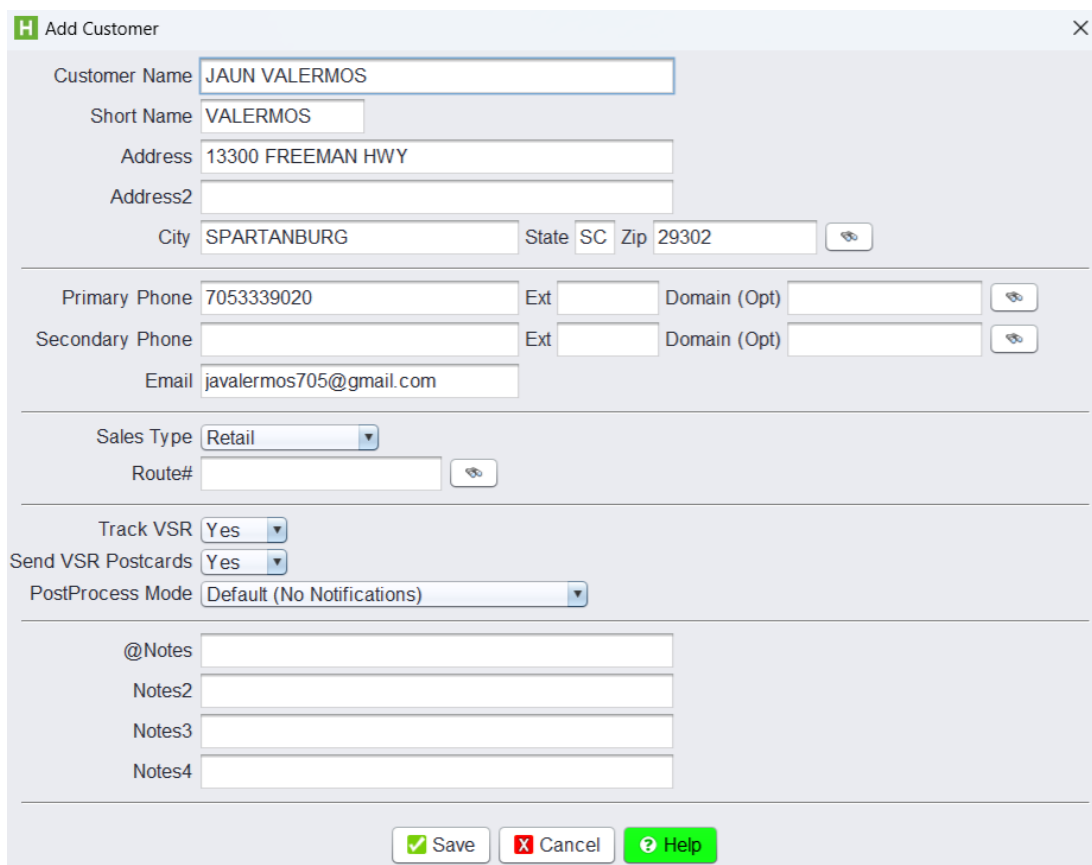
This information will be required for capturing in HITS.

- **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:



Add Customer

Customer Name: JAUN VALERMOS

Short Name: VALERMOS

Address: 13300 FREEMAN HWY

Address2:

City: SPARTANBURG State: SC Zip: 29302

Primary Phone: 7053339020 Ext: Domain (Opt):

Secondary Phone: Ext: Domain (Opt):

Email: javalermos705@gmail.com

Sales Type: Retail

Route#:

Track VSR: Yes

Send VSR Postcards: Yes

PostProcess Mode: Default (No Notifications)

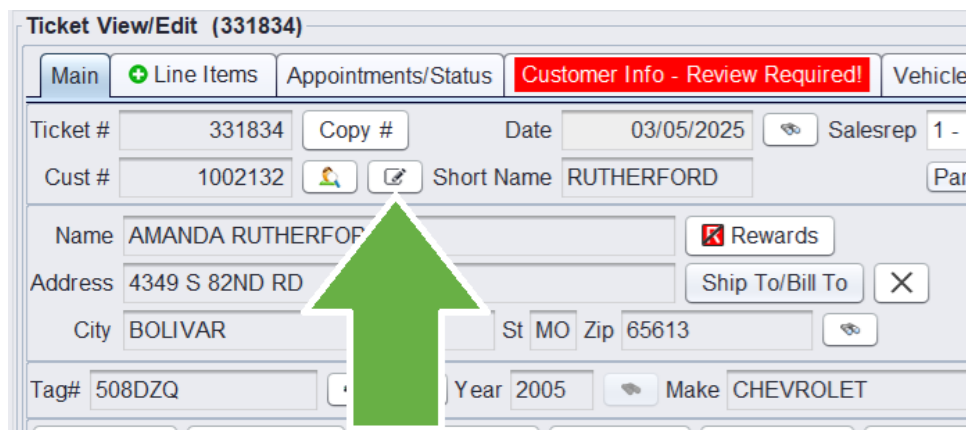
@Notes:

Notes2:

Notes3:

Notes4:

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.



Ticket View/Edit (331834)

Main | **Line Items** | Appointments/Status | **Customer Info - Review Required!** | Vehicle

Ticket # 331834 | Copy # | Date 03/05/2025 | Salesrep 1 -

Cust # 1002132 |   Short Name RUTHERFORD | Par

Name AMANDA RUTHERFORD |  Rewards

Address 4349 S 82ND RD | Ship To/Bill To X

City BOLIVAR | St MO | Zip 65613

Tag# 508DZQ | Year 2005 | Make CHEVROLET

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

Name	AMANDA RUTHERFORD
Short Name	RUTHERFORD

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.

Sales Type Retail

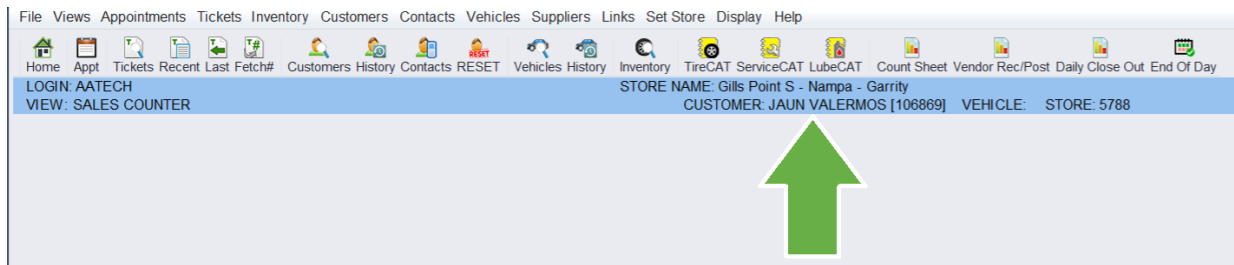
Cash Account

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.

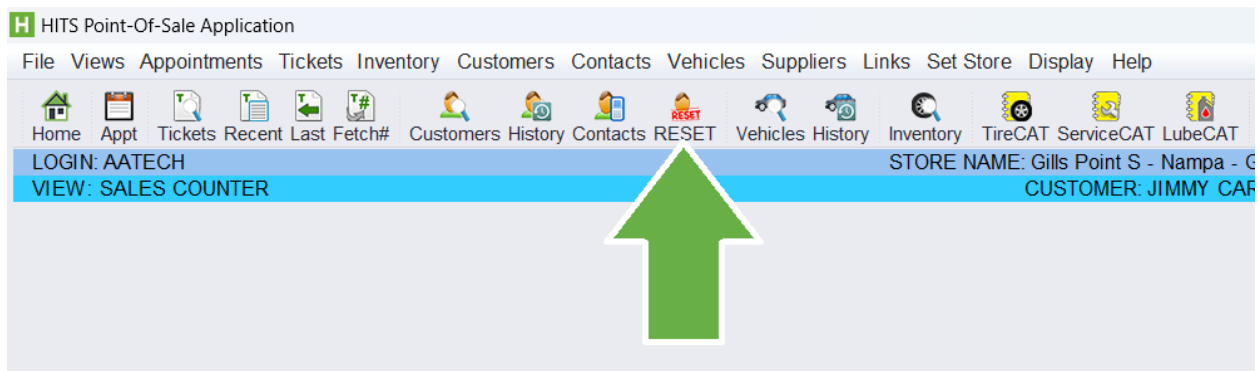
“Active Customer”

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 ...

H Customer Lookup

Short Name: VALERMOS Full Name: _____

☒ Short Name
 ☐ Full Name
 ☐ Customer #
 ☐ Legacy Cust#
 ☐ Phone#
 ☐ Last 4 Phone#
 ☐ Email
 ☐ Ticket#

Last Activity: N/A ☒ By Days Old ☐ By Date

Salesrep: ALL Route#: _____ Mail Switch: _____

☒ All Stores
 ☐ Show Inactive
 Max Customers: 100

Find Clear Recent (max 20) Cash Acct Temporary Customer Edit Customer Add Customer Merge Customers Help

ST#	Cust#	Short Name	Name	Address	City	State	Phone	Active	A/R	Balance
5788	106869	VALERMOS	JAUN VALERMOS	13300 FREEMAN HWY	SPARTANBURG	SC	803-9020	Y	C	
5788	106870	VALERMOS	JUAN VALERMOS				803-9020	Y	C	

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

Customers Contacts Vehicles Supplier

- Lookup
- Lookup by #
- Dashboard (Edit)
- Customer History
- Annual Sales History
- Monthly Sales History
- Account - Add
- Account - View/Edit
- Account - View/Edit Notes
- Account - A/R Info & Lookup
- Account - A/R Info & Lookup Bal Fwd
- Reset To Cash Account
- Merge**

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.

BayIQ ID	4397924	R Rewards
BayIQ Card	067516410312336	

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.

BayIQ ID	0	<input checked="" type="button" value="R Rewards"/>
BayIQ Card		

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

d. Vehicles

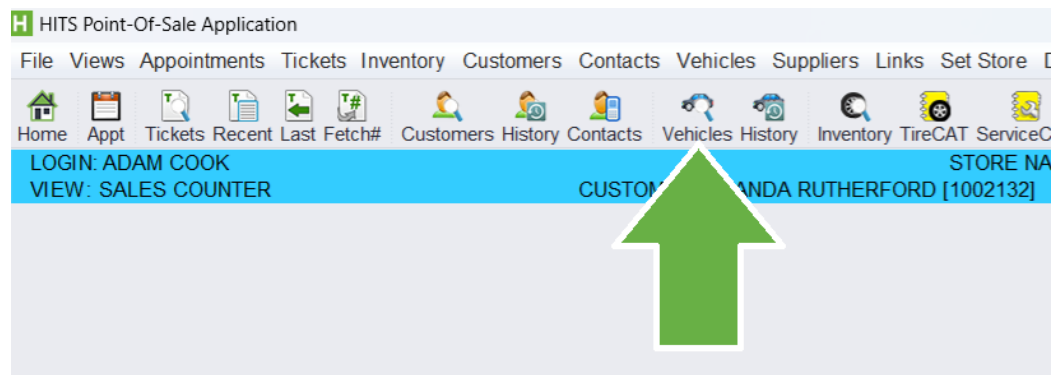
In HITS, vehicles are assigned to a customer. Vehicles cannot be added into the system or invoiced without being assigned to a customer.

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

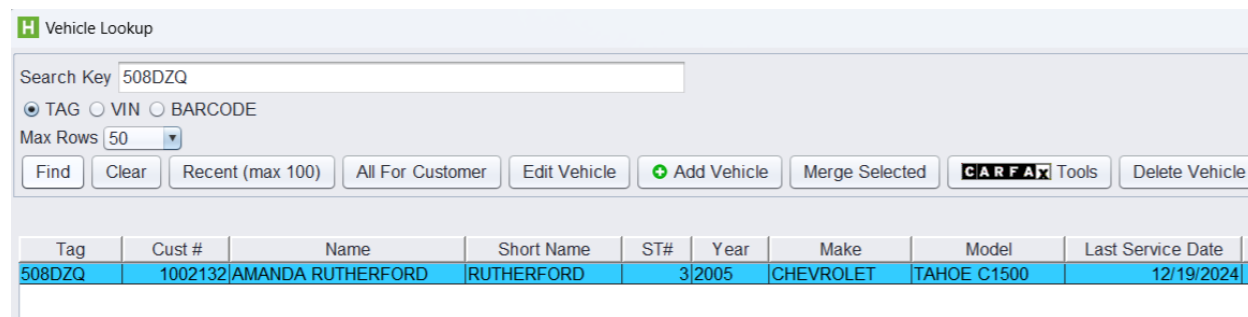
If a vehicle does not have a license plate (such as cars being sent from a dealership), it is recommended to save using the last 8 digits of the VIN.

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.



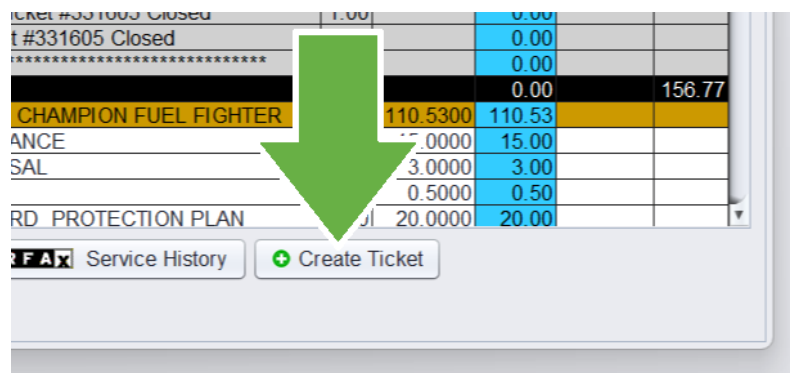
Enter the **TAG** (or VIN or Barcode) and hit **ENTER** (click FIND).



Tag	Cust #	Name	Short Name	ST#	Year	Make	Model	Last Service Date
508DZQ	1002132	AMANDA RUTHERFORD	RUTHERFORD	3	2005	CHEVROLET	TAHOE C1500	12/19/2024

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.



Item #331605 Closed	1.00	0.00	
t #331605 Closed		0.00	
*****		0.00	
		0.00	156.77
CHAMPION FUEL FIGHTER	110.5300	110.53	
ANCE	0.0000	15.00	
SAL	3.0000	3.00	
	0.5000	0.50	
RD PROTECTION PLAN	20.0000	20.00	

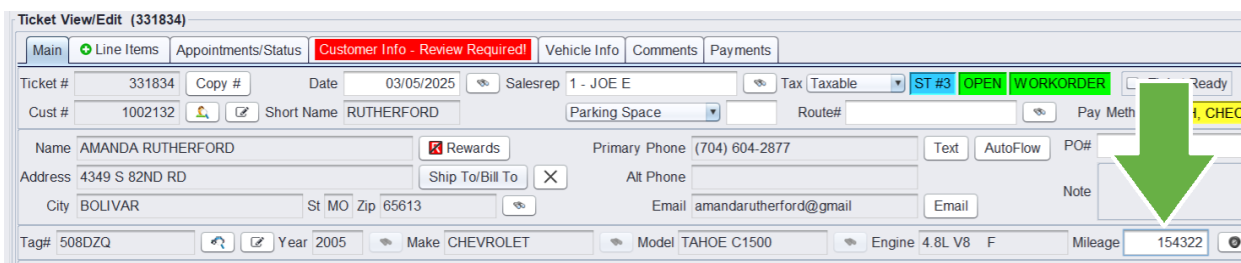
Service History **Create Ticket**

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**.



Ticket View/Edit (331834)

Main | Line Items | Appointments/Status | Customer Info - Review Required | Vehicle Info | Comments | Payments

Ticket # 331834 Copy # Date 03/05/2025 Salesrep 1 - JOE E Tax Taxable ST #3 OPEN WORKORDER Ready

Cust # 1002132 Short Name RUTHERFORD Parking Space Route# Pay Meth CHECK

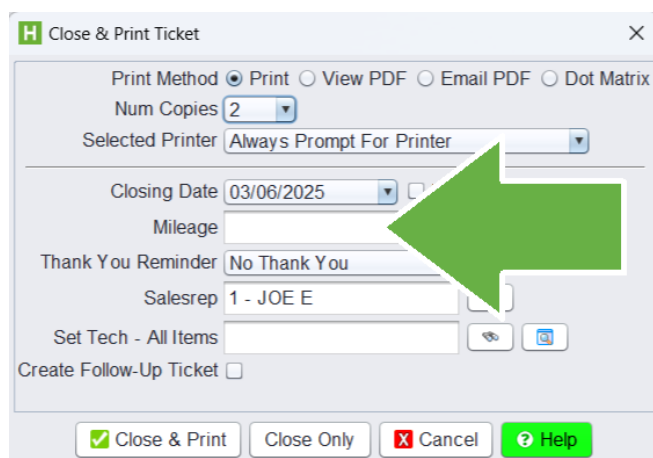
Name AMANDA RUTHERFORD Rewards Primary Phone (704) 604-2877 Text AutoFlow PO#

Address 4349 S 82ND RD Ship To/Bill To Alt Phone Note

City BOLIVAR St MO Zip 65613 Email amandarutherford@gmail.com Email

Tag# 508DZQ Year 2005 Make CHEVROLET Model TAHOE C1500 Engine 4.8L V8 F Mileage 154322

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.



Close & Print Ticket

Print Method ☒ Print ☐ View PDF ☐ Email PDF ☐ Dot Matrix

Num Copies 2

Selected Printer Always Prompt For Printer

Closing Date 03/06/2025

Mileage

Thank You Reminder No Thank You

Salesrep 1 - JOE E

Set Tech - All Items ☒

Create Follow-Up Ticket ☐

☒ Close & Print

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.

Vehicle Edit

Tag

State

Year

Make

Model

Engine

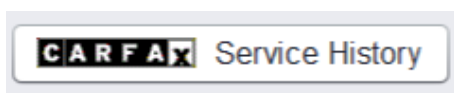
Aces Id

Bar Code

Vin #

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.



Service History Check™

Home Help

2005 CHEVROLET TAHOE LS
VIN: 1GNEC13V35R251650
4 Door Wagon/Sport Utility
4.8L V8 F
Rear wheel drive

This is an excerpt from the CARFAX Vehicle History Report.

This only includes service history reported to CARFAX.

The full CARFAX Report has **29 additional records which may reveal:**

- Accidents / Damage
- Ownership history

To purchase, go to carfax.com or your business account

Date	Mileage	Service Performed
12/19/2024		Vehicle serviced Tire condition and pressure checked Tire(s) balanced Tire(s) mounted Tire(s) replaced
04/30/2024	199,111	Vehicle serviced Oil and filter changed Tire condition and pressure checked

Merge Vehicles

Version 20250312

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 ...

Vehicle Lookup

Search Key

☒ TAG ☐ VIN ☐ BARCODE

Max Rows

Find Clear Recent (max 100) All For Customer Edit Vehicle **Add Vehicle** **Merge Selected** **CARFAX Tools** Delete Vehicle **Help**

Tag	Cust #	Name	Short Name	ST#	Year	Model	Last Service Date	Bar Code
CMD 336	785731	JOSHUA SCHARFENBERG	SCHARFENBE	44	2011	TOYOTA	12/09/2024	
CMD336	785731	JOSHUA SCHARFENBERG	SCHARFENBE	44	2011	TOYOTA	02/25/2025	
CMD336-1	785731	JOSHUA SCHARFENBERG	SCHARFENBE	44	2011	TOYOTA	08/11/2021	
CMD336-2	785731	JOSHUA SCHARFENBERG	SCHARFENBE	44	2011	TOYOTA	06/18/2021	
CMD336-3	785731	JOSHUA SCHARFENBERG	SCHARFENBE	44	2011	TOYOTA	06/16/2021	

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

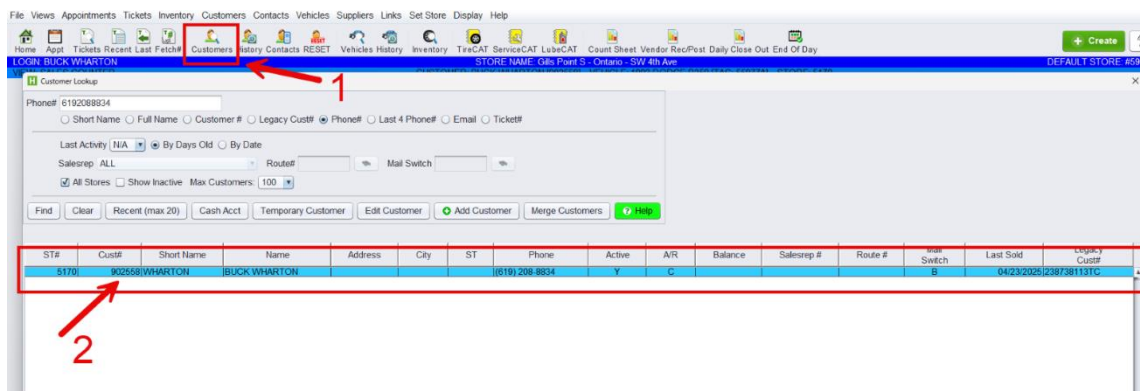
Vehicles Suppliers Links Set S

- Lookup
- All For Customer
- Dashboard (Edit)
- Add Vehicle
- Vehicle History
- Vehicle Service Reminders
- CARFAX Service History
- Change Tag
- Change Owner
- Merge Vehicles**

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:



Customer Lookup

Phone# 619208834

☐ Short Name
 ☐ Full Name
 ☐ Customer #
 ☐ Legacy Cust#
 ☒ Phone#
 ☐ Last 4 Phone#
 ☐ Email
 ☐ Ticket#

Last Activity: N/A | By Days Old: | By Date: |

Salesrep: ALL | Route# | Mail Switch: |

☒ All Stores
 ☐ Show Inactive
 Max Customers: 100

Find Clear Recent (max 20) Cash Acct Temporary Customer Edit Customer Add Customer Merge Customers Help

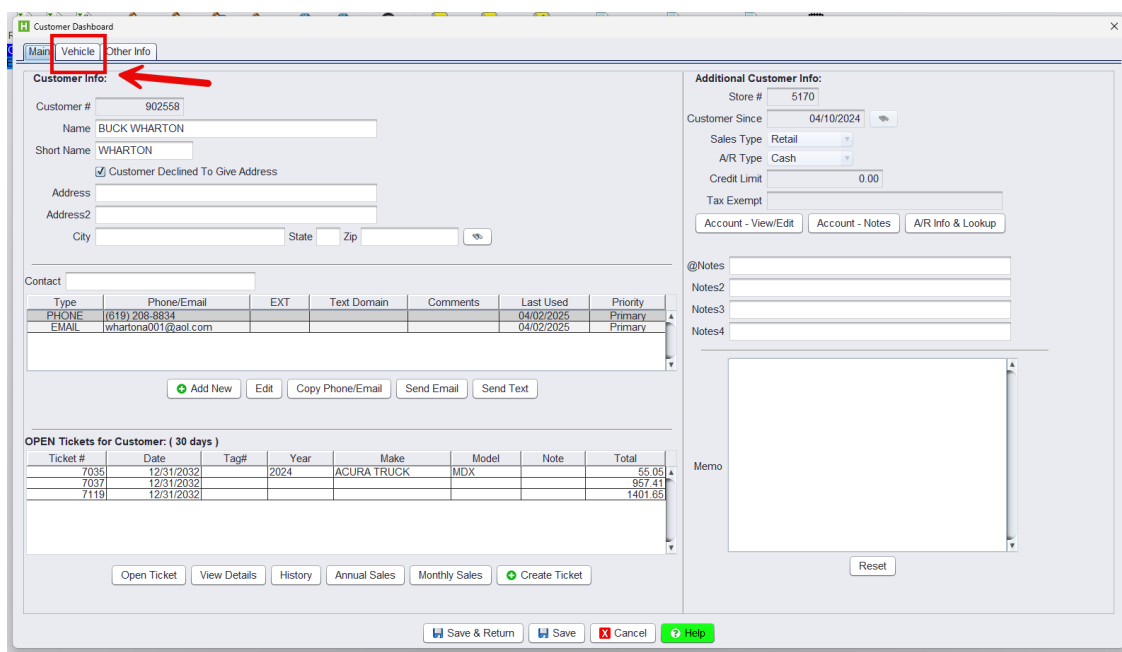
ST#	Cust#	Short Name	Name	Address	City	ST	Phone	Active	A/R	Balance	Salesrep #	Route #	Mail Switch	Last Sold	Legacy Cust#
S170	902558	WHARTON	BUCK WHARTON				(619) 208-8834	Y	C				B	04/23/2025	2387381131C

1. Choose the Customer:

- o Select the customer who has been mis-assigned the vehicle tag.

2. Access the Customer Dashboard:

- o Open the customer profile in the system. Select the Vehicle tag.



Customer Dashboard

Main Vehicle Other Info

Customer Info:

Customer # 902558

Name BUCK WHARTON

Short Name WHARTON

☒ Customer Declined To Give Address

Address

Address2

City State Zip

Contact

Type	Phone/Email	EXT	Text Domain	Comments	Last Used	Priority
PHONE	(619) 208-8834				04/02/2025	Primary
EMAIL	whartona001@aol.com				04/02/2025	Primary

Add New Edit Copy Phone/Email Send Email Send Text

OPEN Tickets for Customer: (30 days)

Ticket #	Date	Tag#	Year	Make	Model	Note	Total
7035	12/31/2032		2024	ACURA TRUCK	MDX		55.05
7037	12/31/2032						957.41
7119	12/31/2032						1401.65

Open Ticket View Details History Annual Sales Monthly Sales Create Ticket

Additional Customer Info:

Store # 5170

Customer Since 04/10/2024

Sales Type Retail

A/R Type Cash

Credit Limit 0.00

Tax Exempt

Account - View/Edit Account - Notes A/R Info & Lookup

@Notes

Notes2

Notes3

Notes4

Memo

Reset

Save & Return Save Cancel Help

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

Customer Dashboard

Main **Vehicle** Other Info

Tag	Year	Make	Model	Last Service Date	Bar Code	Vin #
385NEW	2018	FORD	EXPLORER	04/23/2025		1FM5K8GT6JGC01307
559ZZA	1993	DODGE	B350			2B6JB31Y8PK529570
C35158B	2014	FORD	F250			1FT7W2BT1EEB52038

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

Inventory TireCAT ServiceCAT LubricAT Count Sheet Vendor RecPost Daily Close Out End Of Day

STORE NAME: Gills Point S - Ontario - SW 4th Ave

CUSTOMER: BUCK WHARTON [902558] VEHICLE: 1993 DODGE B350 [TAG: 559ZZA] STORE: 5170

3. Reassign the Vehicle:

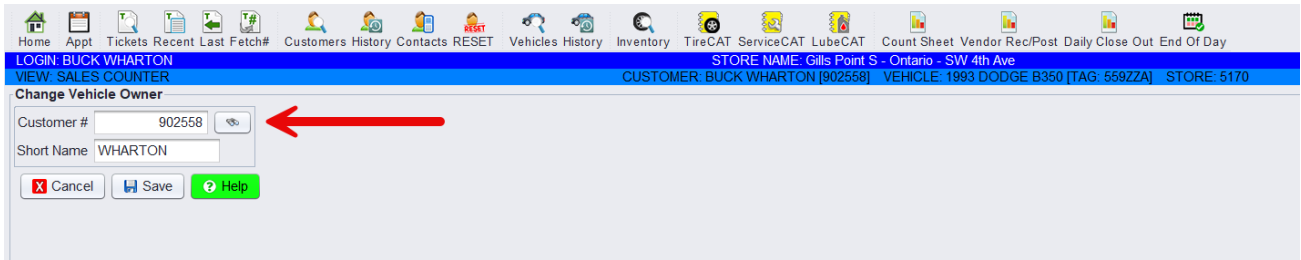
- Reassign the vehicle to the correct customer by updating the vehicle information in the system.

Customers Contacts **Vehicles** Suppliers Links Set Store Display Help

Lookup All For Customer Dashboard (Edit) Add Vehicle Vehicle History Vehicle Service Reminders CARFAX Service History Change Tag **Change Owner** Merge Vehicles Delete Vehicle

STORE NAME: Gills Point S - Ontario - SW 4th Ave
CUSTOMER: BUCK WHARTON [902558] VEHICLE: 1993 DODGE B350 [TAG: 559ZZA] STORE: 5170

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



Home Appt Tickets Recent Last Fetch# Customers History Contacts RESET Vehicles History Inventory TireCAT ServiceCAT LubeCAT Count Sheet Vendor Rec/Post Daily Close Out End Of Day

LOGIN: BUCK WHARTON
VIEW: SALES COUNTER
STORE NAME: Gills Point S - Ontario - SW 4th Ave
CUSTOMER: BUCK WHARTON [902558] VEHICLE: 1993 DODGE B350 [TAG: 559ZZA] STORE: 5170

Change Vehicle Owner

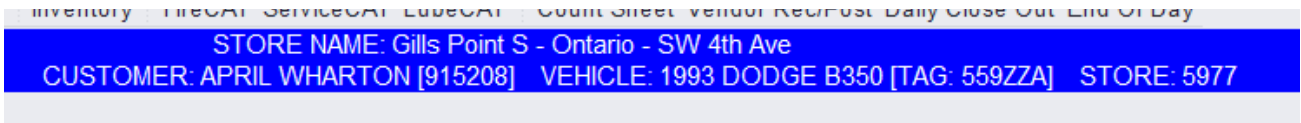
Customer # 902558
Short Name WHARTON

Cancel Save Help

- 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.



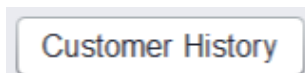
Inventory TireCAT ServiceCAT LubeCAT Count Sheet Vendor Rec/Post Daily Close Out End Of Day

STORE NAME: Gills Point S - Ontario - SW 4th Ave
CUSTOMER: APRIL WHARTON [915208] VEHICLE: 1993 DODGE B350 [TAG: 559ZZA] STORE: 5977

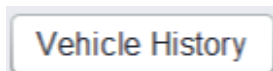
e. History

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.

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

[illegible]

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.

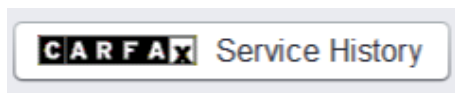
OPP	FRONT CERAMIC PADS	1.00	70.8900	70.89	D
OPL B	REMOVE & REPLACE BRAKE SHOES &/OR PADS - F	1.00	82.0000	82.00	D

“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 TRAILER...	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.

Ticket View/Edit (331835)

Ticket # 331835 Copy # Date 03/06/2025 Salesrep 1 - JOE E Tax Taxable ST #3 OPEN WORKORDER Ticket Ready

Cust # 1002132 Short Name RUTHERFORD Parking Space Route# Pay Method CASH, CHECK, CC

Name AMANDA RUTHERFORD Rewards Primary Phone (704) 604-2877 Text AutoFlow PO#

Address 4349 S 82ND RD Ship To/Bill To Alt Phone Note tire repair - left rear

City BOLIVAR St MO Zip 65613 Email amandarutherford@gmail.com Email

Tag# 385JNH Year 2004 Make GMC Model YUKON XL 1500 Engine 5.3L V8 F Mileage

Ref#	Product #	Description	Link	Qty	Unit Price	Unit FET	Amount	Tech	Price Code	Tax Code	Salesrep	I
1000	TR	TIRE REPAIR		1.0			No Charge	HOUSE	N	0	JOE	AI
1002	OPP (DG785)	FRONT CERAMIC PADS		1.0	70.8900		70.89	HOUSE		1	JOE	AI
1004	OPL_B	REMOVE & REPLACE BRAKE SHOES &/OR PADS - F		1.0	82.0000		82.00	HOUSE	A	0	JOE	AI
1006	-	-		1.0				HOUSE	Z	0	JOE	AI

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

Ticket View/Edit (331835)

Main | **Line Items** | Appointments/Status | **Customer Info - Review Required!** | Vehicle Info | Comments | Payments

Ticket # 331835 Copy # Date 03/06/2025 Salesrep 1 - JOE E Tax Taxable ST #3 OPEN WORKORDER Ticket Ready

Cust # 1002132 Short Name RUTHERFORD Parking Space Route# Pay Method CASH, CHECK, CC

Name AMANDA RUTHERFORD Rewards Primary Phone (704) 604-2877 Text AutoFlow PO#

Address 4349 S 82ND RD Ship To/Bill To X Alt Phone Note tire repair - left rear

City BOLIVAR St MO Zip 65613 Email amandarutherford@gmail.com Email

Tag# 385JNH Year 2004 Make GMC Model YUKON XL 1500 Engine 5.3L V8 F Mileage 0 Clear Write-In

Product Inventory Quick Code Service Package TireCAT ServiceCAT LubeCAT Specs **Comment**

Ref#	Product #	Description	Link	Qty	Unit Price	Unit FET	Ext	Tech	Dept	Price Code	Tax Code	Salesrep	M
1000	TR	TIRE REPAIR		1.0				HOUSE	B	N	0	JOE	AI
1002	OPP (DG785)	FRONT CERAMIC PADS		1.0	70.8900			HOUSE	E		1	JOE	AI
1004	OPL_B	REMOVE & REPLACE BRAKE SHOES &/OR PADS - F		1.0	82.0000			HOUSE	A		0	JOE	AI
1006	-	-		1.0				HOUSE	Z		0	JOE	AI

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).

Ref#	Product #	Description
1000	TR	TIRE REPAIR
1002	OPP (DG785)	FRONT CERAMIC PADS
1004	OPL_B	REMOVE & REPLACE BRAKE SHOES &/OR PADS - F
1006	-	-

Append New Item...

Edit Item...

Insert New Item...

Delete Item(s)...

Delete ALL...

Adjust Items...

Zero Price...

Create Shop Credit...

Toggle Declined Items

Return Selected Items...

Line

Launch Website...

Edit Website Link...

Apply Kit Pricing to Selected Items

Remove Kit Pricing from Selected Items

Append Comment...

Insert Comment Before Selected Item...

Insert Separator...

Save Item

Ad

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

Comments

Enter Comments

Customer was very adamant about not replacing brakes at this time, and claimed they were planning to replace their own brakes.

Add Separator: ☐ Header ☐ Footer ☒ Do Not Print

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

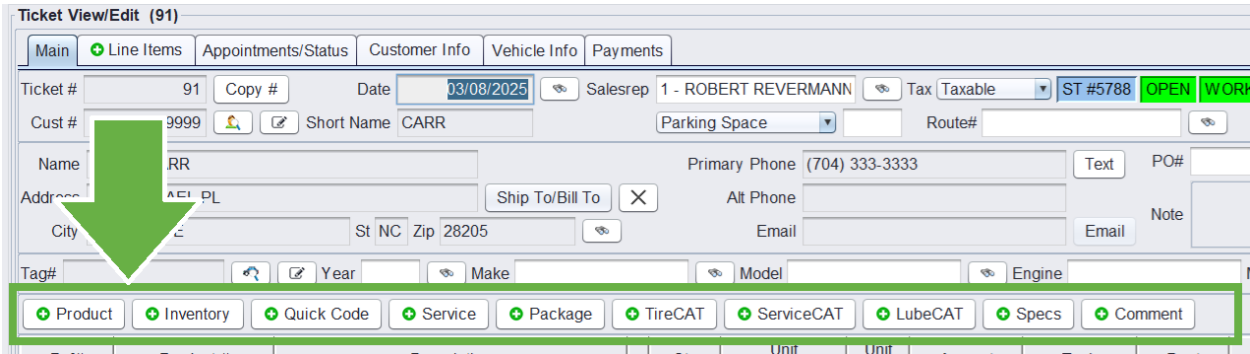
These comments will print on the TECHNICIAN SHEET WORKORDER , but not on the customer's final Invoice.

Ticket View/Edit (331835)								
Main		Line Items	Appointments/Status	Customer Info - Review Required!	Vehicle Info	Comments	Payments	
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 adamant 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 ServiceCAT (powered 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 EPICOR

+ 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.

Ticket View/Edit (91)

Main **Line Items** Appointments/Status Customer Info Vehicle Info Payments

Ref#	Product #	Description	Link	Qty	Unit Price	Unit FET

Ticket 100.0 Ticket GP\$ Store GP% 100.0

Line # 0 Product # Description

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”.

2055516 Tire Fitment TireCAT (powered

☒ Raw Size ☐ Size ☐ Product ☐ Description ☐ Wheel ☐ UID ☐ Alt Product

☐ Exact Match ☒ Starts With ☐ Starting From Max Results 200

☒ Show Zero & Negative Quantities Cutoff Date N/A By Days Old

Find Package Shortcuts Find Services Find Specials Find Rece

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.

Inventory Scan	Drive Out Pricing	In Process	More Data	Store Qtys	12 Month Movement	Prices - No FET	Specials	Costs	EPP										
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	478.34	478.34	407.70	407.70	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.

Pkg 1	Pkg 2	Pkg 3	Pkg 4	Pkg 5
103.28	103.28	32.50	32.50	
387.36	387.36	316.58	316.58	284.08
431.20	431.20	360.42	360.42	327.92
447.57	447.57	376.79	376.79	344.29
				375.07
				375.20
				399.83
				426.42

Quick Detail...

Create Workorder/Quote...

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

File Views Appointments Tickets Inventory Customers Contacts Vehicles Suppliers Links Set Store Display Help

Home Appt Tickets Recent Last Fetch# Customers History Contacts RESET Vehicles History Inventory TireCAT ServiceCAT LubeCAT

LOGIN: AATECH STORE NAME: Gills Point S - Nampa - Ge VIEW: SALES COUNTER (LC CUSTOMER: JIMMY

Inventory Scan - Sales Counter

Customer JIMMY CARR (99999)

Inventory 2156016

Tire Fitment TireCAT (powered by TireConnect)

Raw Size Size Product Description Wheel UD Alt Product Alt Product 2 MFG SKU Barcode

Exact Match Starts With Starting From Max Results 100 Tire Format Wheel Format

Show Zero & Negative Quantities Cutoff Date N/A By Date Show GP%

Find Find Package Shortcuts Find Services Find Specials Clear Input Clear Options Clear

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**

TOP RECOMMENDATIONS:

1 2 3 4 .. Next »

☐ Add to compare


HITS - Peerless Tire 4
ONE
 ALL SEASON
 WARRANTY: **80000** MI
 QTY: 4 PER TIRE: **\$135.99**
 Set of 4: \$543.96
 SEE OUT-THE-DOOR PRICE
 SPECS

☐ Add to compare


U.S. AutoForce/TWI 8
N'PRIZ AH5
 TOURING ALL SEASON
 WARRANTY: **50000** MI
 QTY: 4 PER TIRE: **\$107.99**
 Set of 4: \$431.96
 SEE OUT-THE-DOOR PRICE
 SPECS

☐ Add to compare


U.S. AutoForce/TWI 8
KINERGY PT H737
 TOURING ALL SEASON
 WARRANTY: **90000** MI
 QTY: 4 PER TIRE: **\$117.99**
 Set of 4: \$471.96
 SEE OUT-THE-DOOR PRICE
 SPECS

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

← CHOOSE DIFFERENT TIRE

215/60R16 95V



ONE
 ALL SEASON 215/60R16 95V MPN # T431351
 WARRANTY: **80000** MI
 QTY: 4 PER TIRE: **\$135.99**
 Set of 4: \$543.96

TIRES

> Nokian ONE Qty: 4 \$543.96

REQUIRED SERVICES

> Install + Balance  \$87.96

Launch Native Show Source **Add To Ticket** Save Session & Return Cancel Suggest Help

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.

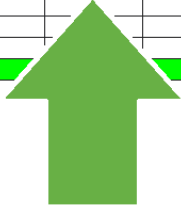
Ticket View/Edit (91)

Main | **+ Line Items** | Appointments/Status | Customer Info | Vehicle Info | Payments

Ticket # 91 | Copy # | Date 03/08/2025 | Salesrep 1 - ROBERT REVERMANN | Tax Taxable | ST #5788 **OP**
 Cust # 99999 | Short Name CARR | Parking Space | Route#
 Name JIMMY CARR | Primary Phone (704) 333-3333 | Text | PC
 Address 613 RAPHAEL PL | Ship To/Bill To X | Alt Phone | No
 City CHARLOTTE | St NC | Zip 28205 | Email | Email
 Tag# | Year | Make | Model | Engine

+ Product | + Inventory | + Quick Code | + Service | + Package | + TireCAT | + ServiceCAT | + LubeCAT | + Specs | + Comme

Ref#	Product #	Description	Link	Qty	Unit Price	Unit FET	Amount
1000	OPT (1023419)	215/60R16 95HKINERGY PT H737		4.0	117.9900		471.96
1002	DSMP	DISMOUNT & MOUNT		1.0	20.0000		20.00
1004	TIREDISP	TIRE DISPOSAL		4.0	2.5000		10.00
1006	PPW	PROMISE PLUS WARRANTY PLAN		4.0	17.0000		68.00
1008	SS99-5788	SHOP SUPPLIES/ENVIRONMENT FEES		1.0	5.2800		5.28



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.

H Quick Items Lookup

Services | Packages | **Quick Codes**

Product #	MFG	Size	Description
MECH			GENERAL LABOR
OPP		OUTSIDE	PURCHASE PART
OPT		OUTSIDE	PURCHASE TIRE
OPW		OUTSIDE	PURCHASE WHEEL
OPA		OUTSIDE	PURCHASE ACCESSORY
OPTUBE		OUTSIDE	PURCHASE TUBE

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

Line #	Product #	Outside Part#	Description	Unit Cost w/FET	Vendor Code	Vendor Inv#	Vendor Date
0	OPW	M899902220	MISSION RF42 BLACK CHROME SPOKE	234.00	NO VENDOR		

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.

H 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.

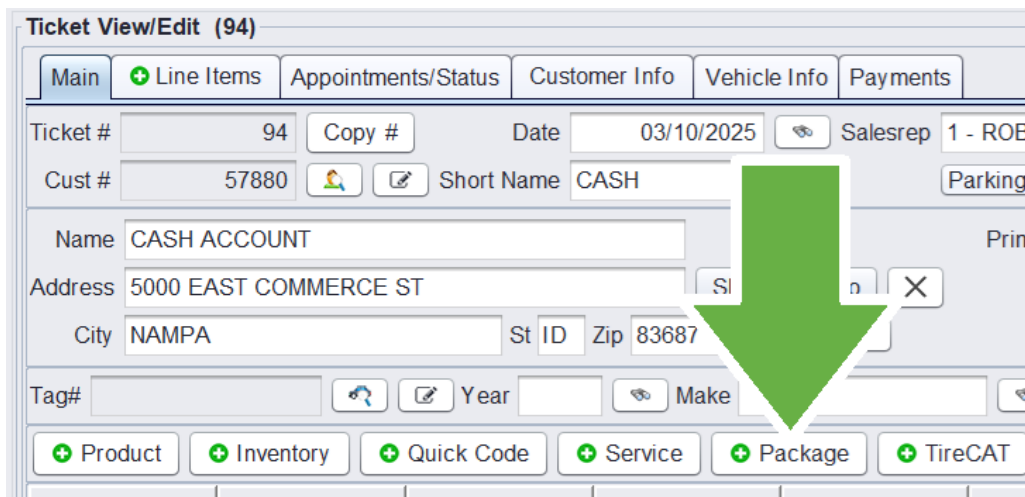
You can edit the **Quantity** if you need to adjust the time billed for hourly labor code.

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...



Ticket View/Edit (94)

Main + Line Items Appointments/Status Customer Info Vehicle Info Payments

Ticket # 94 Copy # Date 03/10/2025 Salesrep 1 - ROBE

Cust # 57880 Short Name CASH

Name CASH ACCOUNT

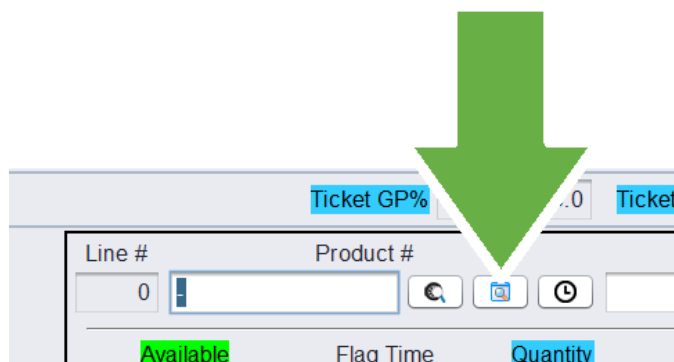
Address 5000 EAST COMMERCE ST

City NAMPA St ID Zip 83687

Tag# Year Make

+ Product + Inventory + Quick Code + Service + Package + TireCAT

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



Ticket GP% .0 Ticket

Line #	Product #	Quantity
0		

Available Flag Time

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

Quick Items Lookup						
Quick Lookup Services Packages Quick Codes						
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**.

The screenshot shows the ServiceCAT interface. At the top, there are sections for 'Suppliers' (with checkboxes for Local Inventory, AutoZone, Factory Motor Parts, O'Reilly) and 'Display Items That Are...' (with checkboxes for In Stock, Out of Stock, Non-Stocking). Below these are 'General Options' including checkboxes for Epicor Parts Pricing, Epicor Labor Pricing, Show Cost, LI-OPP2COM, Short Descriptions, and Auto-Answer. A green arrow points to the 'Fetch Jobs' button. Below the buttons are tabs for 'Jobs', 'Categories - Parts/Labor', 'Description - Parts/Labor', and 'Service Intervals'. The 'Jobs' tab is selected, showing a list of job categories on the left (My Jobs, Lookup Jobs, Accessories, Brakes, Cooling, Electrical, Engine, Exhaust, Final Drive, Fuel & Emission) and a list of specific jobs on the right, including 2 Wheel Alignment, 4 Wheel Alignment, Air Bag Control Module, Air Bag Sensor, Ball Joint - Front Suspension, Ball Joint - Rear Suspension, Center Link, Check Alignment Settings, Coil Springs - Front Suspension, Coil Springs - Rear Suspension, Control Arm - Front Suspension, Control Arm - Rear Suspension, Control Arm Bushings - Front Suspension, Control Arm Bushings - Rear Suspension, Leveling System, Pitman Arm, Power Steering Hi-Pressure Hose, Power Steering Pump, Power Steering Return Hose, Rack & Pinion Assembly, Rear Struts or Shocks, Spring Shackle Kit-Front Suspension, Spring Shackle Kit-Rear Suspension, Stability Control, Stabilizer Bar - Front Suspension, Stabilizer Bar - Rear Suspension, and Steering Coupling Disc.

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.

The screenshot shows the ServiceCAT interface with the 'Preview Selections' tab selected. The table below lists the selected items:

Product #	Description	Qty	Price Code	Unit Price	Unit FET	Amount	Unit Cost	GP%
	* FRONT STRUTS OR SHOCKS (SRSF) *	1.0					0.00	
OPP (72685)	FRONT OESPECTRUM STRUT	2.0		1.9900		483.98	120.66	50.1
OPL_B	REMOVE & INSTALL OR REMOVE & REPLACE FRONT SHOCK &/OR STRUT AS	2.2					0.00	
		1.0					0.00	
	* CONTROL ARM - FRONT SUSPENSION (SCAF) *	1.0					0.00	
OPP (2CB25198)	CONTROL ARM WITH BALL JOINT	1.0		164.9900		164.99	59.63	63.9
OPL_B	REMOVE & REPLACE F CONTROL ARM - ONE SIDE	2.2					0.00	
OPL_B	REMOVE & REPLACE F CONTROL ARM - UPPER, ONE SIDE	1.3					0.00	
		1.0					0.00	

At the top of the table, there are buttons: 'Add To Active Ticket', 'Add To Active Ticket & Clear', 'Add To Active Ticket & Exit', and 'Clear Preview Selections'. A green arrow points to the 'Add To Active Ticket & Exit' button.

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 screenshot shows the 'Order Parts' screen with a table of items. A green arrow points to the 'Order Parts' button at the bottom right.

Line #	Product #	Description	Unit Cost w/FET
1004	OPL_B	REMOVE & INSTALL OR REMOVE & REPLACE FRC	0.00

Below the table, there are fields for 'Nonstock', 'Flag Time', 'Quantity', 'Price Code', 'Unit Price', 'Unit FET', 'Tax Code', 'Technician', 'Salesrep', 'Dept', and 'Package'. The 'Order Parts' button is highlighted in red.

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.

The screenshot shows the 'LubeCAT' Specification tab with a table of specifications. The 'Local Inventory' tab is selected.

	Description	Part#	
☒	Engine Oil Drain Plug Torque	30FT-LBS	INSTALL A NEW WASHER ON T
☐	Engine Oil Capacity Liters	4.40	INCLUDES FILTER CAPACITY
☒	Engine Oil Capacity Quarts	4.60	INCLUDES FILTER CAPACITY
☒	Recommended Viscosity	0W-20	ALL TEMPERATURES; PREM GI
☐	Recommended Engine Oil	API	USE OIL CERTIFIED BY THE AN
☒	Recommended Viscosity	0W-20	ALL TEMPERATURES; PREM GI

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.

Local Inventory AutoZone Factory Motor Parts O'Reilly *Labor* *Specifications* Preview Selections Active Hi

Lube Oil & Filter Service (LOFS)

Avail	Quantity	Part#	Description
Oil Filter			
☐	1	R7356	FVP CAN EQPD; MEXICO; US EQPD; ALSO AVAILABLE IN MASTER PK VERSION WARNING: MFR INDICATES THIS IS A CA PROP 65 ITEM
☒	1	VO106	VALVOLINE
Oil [b] Synthetic Blend {Local}			
☐	4.60	VBB881052 (10W-30)	SYNTHETIC BLEND EPAK 10W-30 MOTOR OIL
☒	4.60	VV1740 (5W-20)	DAILY PROTECTION 5W-20 SYNTHETIC BLEND
☐	4.60	VV1770 (5W-30)	DAILY PROTECTION 5W-30
Oil [c] High Mileage {Local}			
☐	4.60	VV1550 (5W-30)	SYNTHETIC BLEND MOTOR OIL 5W-30 HIGH MILEAGE

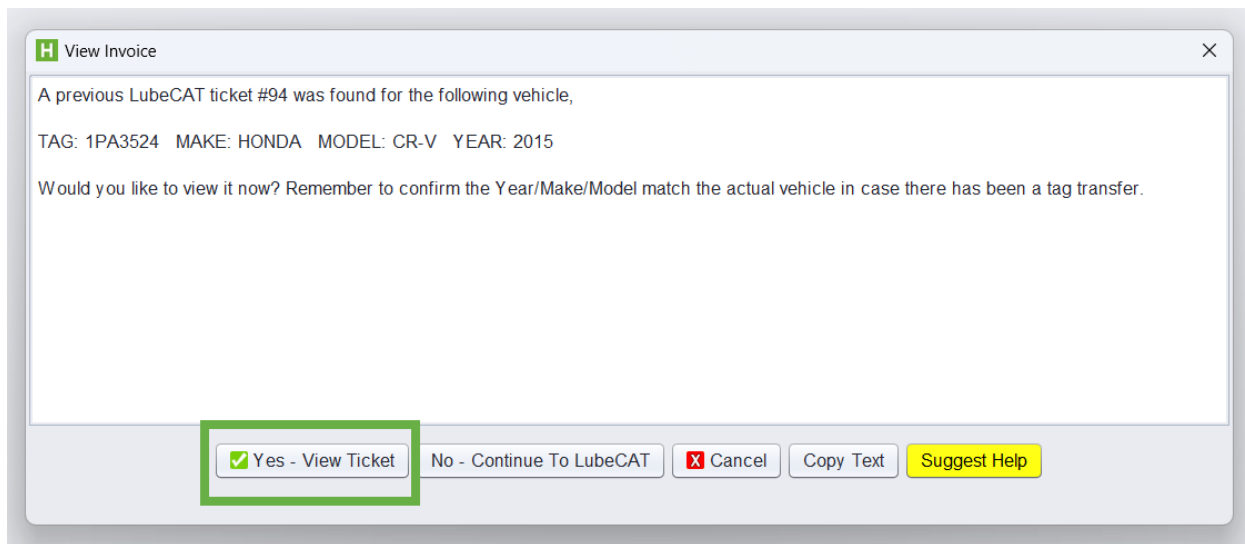
Click the **Preview Selections** tab to verify the oil change items are correct, and then click **Add To Active Ticket & Exit**.

Local Inventory AutoZone Factory Motor Parts O'Reilly *Labor* *Specifications* Preview Selections Active HITS Ticket

Add To Active Ticket Add To Active Ticket & Clear Add To Active Ticket & Exit Clear Preview Selections

Product #	Description	Qty	Price	Unit Price	Unit FET	Unit	Unit Cost	GP%	Tech	Tax Code
* LUBE OIL & FILTER SERVICE (LOFS) *										
	*** SPEC: RECOMMENDED VISCOSITY [0W-20]	1.0	!				0.00		0	
	*** SPEC: ENGINE OIL DRAIN PLUG TORQUE [30FT-LBS]	1.0	!				0.00		0	
	*** SPEC: RECOMMENDED VISCOSITY [0W-20]	1.0	!				0.00		0	
	*** SPEC: ENGINE OIL CAPACITY QUARTS [4.60]	1.0	!				0.00		0	
OPP	OIL FILTER	1.0		4.9900		4.99	1.99	60.1	0	1
VV1740	5W-20 DAILY PROTECTION 5W-20 SYNTHETIC BLEND	4.6					0.00		0	1
MECHLUBE	LUBE - OIL CHANGE	1.0	0				0.00		0	0
-	-	1.0					0.00		0	

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.



H View Invoice [X]

A previous LubeCAT ticket #94 was found for the following vehicle,

TAG: 1PA3524 MAKE: HONDA MODEL: CR-V YEAR: 2015

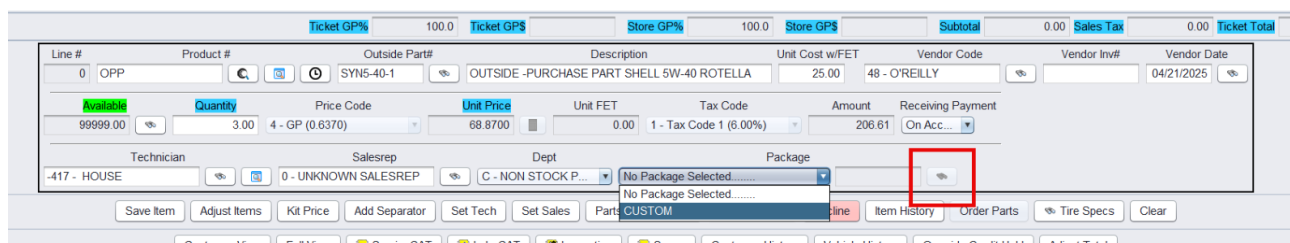
Would you like to view it now? Remember to confirm the Year/Make/Model match the actual vehicle in case there has been a tag transfer.

☒ Yes - View Ticket

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".



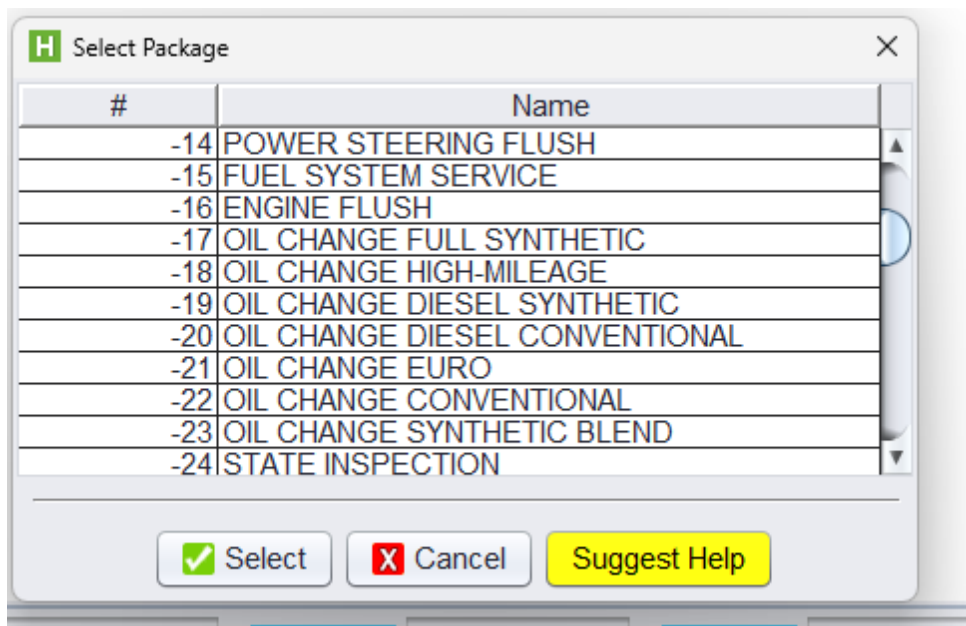
Line #	Product #	Outside Part#	Description	Unit Cost w/FET	Vendor Code	Vendor Inv#	Vendor Date
0	OPP	SYN5-40-1	OUTSIDE -PURCHASE PART SHELL 5W-40 ROTELLA	25.00	48 - O'REILLY		04/21/2025

Available	Quantity	Price Code	Unit Price	Unit FET	Tax Code	Amount	Receiving Payment
	3.00	4 - GP (0.6370)	68.8700	0.00	1 - Tax Code 1 (6.00%)	206.61	On Acc...

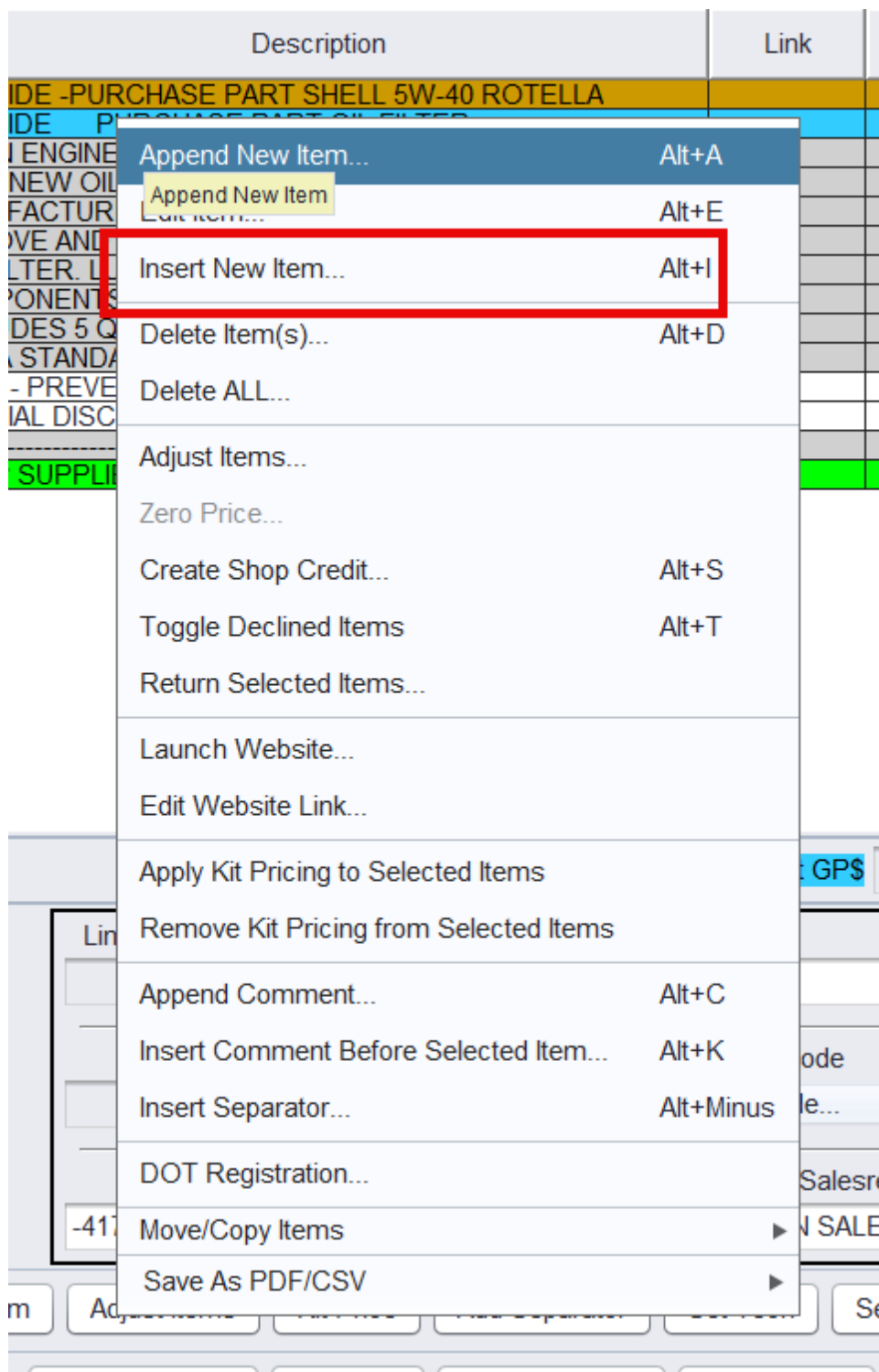
Technician	Salesrep	Dept	Package
-417 - HOUSE	0 - UNKNOWN SALESREP	C - NON STOCK P...	No Package Selected

Buttons: Save Item, Adjust Items, Kit Price, Add Separator, Set Tech, Set Sales, Parts, CUSTOM, Item History, Order Parts, Tire Specs, Clear

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.

LOGIN: BUCK WHARTON STORE NAME: Gills Point S - Caldwell - South 34th Ave DEFAULT STORE: #417
VIEW: SALES COUNTER CUSTOMER: SERVICE TRUCKS - OVERHEAD [904786] VEHICLE: 2019 RAM 1500 CLASSIC [TAG: 130MLD] STORE: 422

Ticket View/Edit (5214)

Main Line Items Appointments/Status Links **Customer Info - Review Required!** Vehicle Info Payments

Ref#	Product #	Description	Link	Qty	Unit Price	Unit FET	Amount	Tech	Dept	Price Code	Tax Code	Salesrep	Last Modified By
1000	OPP (SYN5-40-1)	OUTSIDE -PURCHASE PART SHELL 5W-40 ROTELLA		3.0	68.8700		206.61	HOUSE	C	4	1		BUCK WHARTON
1002	OPP (WL10060)	OUTSIDE - PURCHASE PART OIL FILTER		1.0	41.3200		41.32	HOUSE	C	4	1		BUCK WHARTON
1004		DRAIN ENGINE OIL AND REPLACE		1.0				HOUSE	0	0	0		BUCK WHARTON
1006		WITH NEW OIL MEETING		1.0				HOUSE	0	0	0		BUCK WHARTON
1008		MANUFACTURER SPECIFICATION		1.0				HOUSE	0	0	0		BUCK WHARTON
1010		REMOVE AND REPLACE ENGINE		1.0				HOUSE	0	0	0		BUCK WHARTON
1012		OIL FILTER LUBRICATE CHASSIS		1.0				HOUSE	0	0	0		BUCK WHARTON
1014		COMPONENTS AS NEEDED		1.0				HOUSE	0	0	0		BUCK WHARTON
1016		INCLUDES 5 QUARTS OF OIL		1.0				HOUSE	0	0	0		BUCK WHARTON
1018		AND A STANDARD SPIN-ON FILTER		1.0				HOUSE	0	0	0		BUCK WHARTON
1020	MECHPM	LUBE - PREVENTATIVE MAINTENANCE SERVICE		1.0	32.0000		32.00	HOUSE	0	1	0		BUCK WHARTON
1022	LOP-SPEC	SPECIAL DISCOUNT		-1.0	6.9400		-6.94	HOUSE	V	0	0		BUCK WHARTON
1024				1.0				HOUSE	0	0	0		BUCK WHARTON
1026	SS99-417	SHOP SUPPLIES/ENVIRONMENT FEES		1.0	2.5000		2.50	HOUSE	K	0	1		BUCK WHARTON

Ticket GP% 67.3 Ticket GP\$ 185.49 Store GP% 100.0 Store GP\$ Subtotal 275.49 Sales Tax 15.03 Ticket Total 290.52

Line # Product # Description Unit Cost w/FET
0 0.00

Available Quantity Price Code Unit Price Unit FET Tax Code Amount
99999.00 1.00 Select Price Code... 0.0000 0.00 0 - No Tax 0.00

Technician Salesrep Dept Package
-417 - HOUSE 0 - UNKNOWN SALESREP Select Department... No Package Selected

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.

HITS Point-Of-Sale Application

File Views Appointments Tickets Inventory Customers Contacts Vehicles Suppliers Links Set Store Display Help

Home Appt Tickets Recent Last Fetch# Customers History Contacts Vehicles History Inventory TireCAT ServiceCAT LubeCAT End Of Day

LOGIN: ADAM COOK STORE NAME: MAVERICK TOAS RETAIL #3
VIEW: SALES COUNTER CUSTOMER: AMANDA RUTHERFORD [1002132] VEHICLE: 2004 GMC YUKON XL 1500 [TAG: 385JNH] STORE

Ticket View/Edit (331835)

Main Line Items Appointments/Status Customer Info Vehicle Info Comments Payments

Ticket # 331835 Copy # Date 03/06/2025 Salesrep 1 - JOE E Tax Taxable ST #3 OPEN WORKORDER

Cust # 1002132 Short Name RUTHERFORD Parking Route# Pay M

Name AMANDA RUTHERFORD Rewards (704) 604-2877 Text AutoFlow PO#

Address 4349 S 82ND RD Ship To/Bill To X

City BOLIVAR St MO Zip 65613 Email amandarutherford@gmail.com Note

Tag# 385JNH Year 2004 Make GMC YUKON XL 1500 Engine 5.3L V8 F Mileage

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.

Ticket View/Edit (331835)

Main Line Items Appointments/Status Customer Info Vehicle Info Comments Payments

Ref#	Product #	Description	Link	Qty	Unit Price	Unit FET	Amount	Tech	Dept	Price Code	Tax Code	Salesrep	Last Modified By
1000	TR	TIRE REPAIR		1.0			No Charge	HOUSE	B	N	0	JOE	ADAM COOK
1002	OPP (DG785)	FRONT CERAMIC PADS		1.0	70.8900		70.89	HOUSE	E	1	0	JOE	ADAM COOK
1004	OPL B	REMOVE & REPLACE BRAKE SHOES &/OR PADS - F		1.0	82.0000		82.00	HOUSE	A	0	0	JOE	ADAM COOK
1006		Customer was very adamant about not		1.0				0	Z	1	0	HOUSE	ADAM COOK
1008		replacing brakes at this time, and claimed		1.0				0	Z	1	0	HOUSE	ADAM COOK
1010		they were planning to replace their own		1.0				0	Z	1	0	HOUSE	ADAM COOK
1012		brakes.		1.0				0	Z	1	0	HOUSE	ADAM COOK
1014				1.0				HOUSE	Z	0	0	JOE	ADAM COOK

Subtotal: 0.00 Sales Tax: 0.00 Ticket Total: 0.00

Line # Product # Description Unit Cost w/FET

0 0.00

Available Quantity Price Code Unit Price Unit FET Tax Code Amount

0.00 1.00 Select Price Code 0.0000 0.00 0 - No Tax 0.00

Technician Sales Dept Package

3 - HOUSE 1 - JOE E Select Department No Package Selected

Save Item Adjust Items Kit Price Add Separator Set Tech Set Sales Parts & Vendor Info Return Goods Decline Item History Order Parts Tire Specs Clear

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).

Ticket View/Edit (331835)

Main Line Items Appointments/Status Customer Info Vehicle Info Comments Payments

Ref#	Product #	Description	Link	Qty	Unit Price	Unit FET	Amount	Tech	Dept	Price Code	Tax Code	Salesrep	Last Modified By
1000	TR	TIRE REPAIR		1.0			No Charge	HOUSE	B	N	0	JOE	ADAM COOK
1002	OPP (DG785)	FRONT CERAMIC PADS		1.0	70.8900		70.89	HOUSE	E	1	0	JOE	ADAM COOK
1004	OPL B	REMOVE & REPLACE BRAKE SHOES &/OR PADS - F		1.0	82.0000		82.00	HOUSE	A	0	0	JOE	ADAM COOK
1006		Customer was very adamant about not		1.0				0	Z	1	0	HOUSE	ADAM COOK
1008		replacing brakes at this time, and claimed		1.0				0	Z	1	0	HOUSE	ADAM COOK
1010		they were planning to replace their own		1.0				0	Z	1	0	HOUSE	ADAM COOK
1012		brakes.		1.0				0	Z	1	0	HOUSE	ADAM COOK
1014				1.0				HOUSE	Z	0	0	JOE	ADAM COOK

Subtotal: 0.00 Sales Tax: 0.00 Ticket Total: 0.00

Line # Product # Description Unit Cost w/FET

0 0.00

Available Quantity Price Code Unit Price Unit FET Tax Code Amount

0.00 1.00 Select Price Code 0.0000 0.00 0 - No Tax 0.00

Technician Sales Dept Package

3 - HOUSE 1 - JOE E Select Department No Package Selected

Save Item Adjust Items Kit Price Add Separator Set Tech Set Sales Parts & Vendor Info Return Goods Decline Item History Order Parts Tire Specs Clear

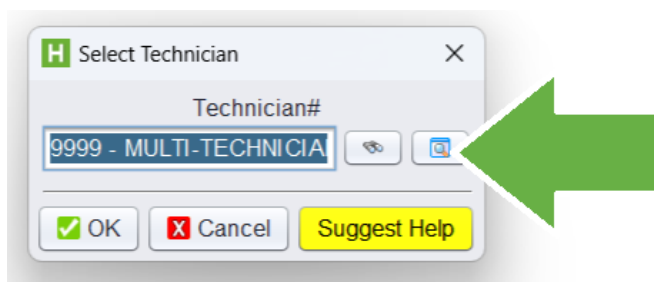
A pop-up window will allow you to enter the technician's code.

Select Technician

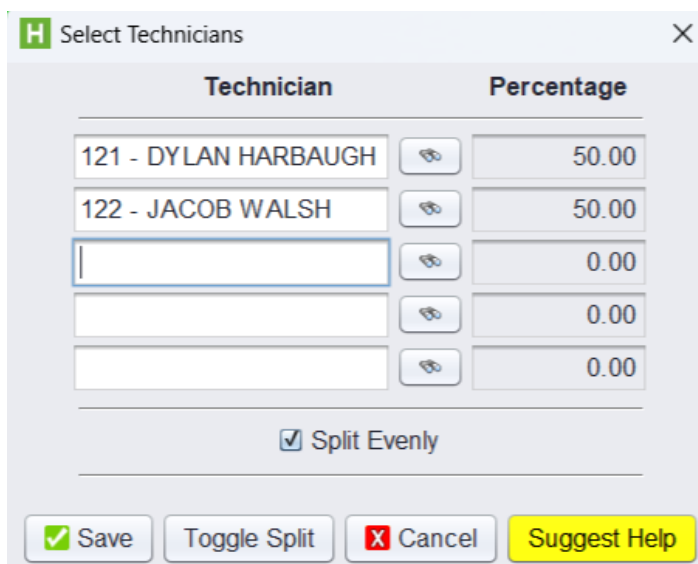
Technician#

OK Cancel Suggest Help

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

Ref#	Product #	Description	Link	Qty	Unit Price	Unit FET	Amount	Tech	Dept	Price Code	Tax Code	Salesrep	Last Modified By
1000	OPP (D3920302)	CERAMIC BRAKE PADS		1.0	123.9900		123.99	HOUSE	C	K	1	ROBERT R.	AATECH
1002	MECH	BRAKE PAD INSTALLATION		1.0	120.0000		120.00	HOUSE	E	K	0	ROBERT R.	AATECH
1004	>>>>>>>>>>	PACKAGE TOTAL		1.0				HOUSE	Z	0	0	ROBERT R.	AATECH
1006	-	*****						HOUSE	Z	0	0		AATECH
1008	SS99 5788	SHOP SUPPLIES/ENVIRONMENT FEES		1.0	7.2000		7.20	HOUSE	J	0	0	ROBERT R.	AATECH

Ticket GP% 82.1
 Ticket GPs 206.19
 Store GP% 100.0
 Store GPs
 Subtotal 251.19
 Sales Tax 7.44
 Ticket Total 258.63

Line # Product # Description

Available
 Flag Time
 Quantity
 Price Code
 Unit Price
 Unit FET
 Tax Code
 Amount

1.00 0.00 1.00 0 - No Price Code 0.0000 No Tax 0.00

Technician Salesrep Dept Package

.5788 - HOUSE 1 - ROBERT REVERMANN Select Department... No Package S...



Save Item Adjust Items Kit Price Add Separator Set Tech Set Sales Parts & Vendor Info Return Goods Decline Item History Order Parts Tire Specs Clear

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

Ticket View/Edit (91)

Main **Line Items** Appointments/Status Customer Info Vehicle Info Payments

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 be 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”.

Customer Dashboard

Main Vehicle **Tire Storage** Other Info

Customer Info:

Customer # 1209957
 Name ROBERT ROBBINS
 Short Name ROBBINS
☐ Customer Declined To Give Address
 Address 227 GRAFTON TURNPIKE RD
 Address2
 City CANAAN State NH Zip 03741

Additional Customer Info:

Store # 965
 Customer Since 06/23/2025
 Sales Type Retail
 A/R Type Cash
 Credit Limit 0.00
 Tax Exempt
 Bayiq Id 2829922 **Rewards**
 Bayiq Card 102432635039278
 Account - View/Edit Account - Notes A/R Info & Lookup

Contact

Type	Phone/Email	EXT	Text Domain	Comments	Last Used	Priority	Rewards
PHONE	(603) 657-0969				06/23/2025	Primary	YES
PHONE	(603) 298-5751				08/05/2025		
EMAIL	robertrobbins@gillstire.com				06/23/2025	Primary	YES
EMAIL	robbins78@msn.com				08/05/2025		

OPEN Tickets for Customer: (30 days)

Ticket #	Date	Tag#	Year	Make	Model	Note	Total
-7418237	11/18/2025	501A555	2023	TOYOTA	TACOMA		0.00

@Notes

Notes2
 Notes3
 Notes4

Memo

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

Quick Ticket History

Years: From: To:

Show Future Dates: ☒

Customer:

All Stores: ☒

Type: ☒ All ☐ Workorder ☐ Quote

Status: ☒ All ☐ Open ☐ Closed

Items To Show: ☒ Open/Billed ☒ Declined ☐ Rebilled ☒ Hidden ☒ Legacy

Item Filters

Dept(s) Filter:

Product Filter:

Show Cost: ☐

Max Tickets:

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”.

Ticket # Copy # Date Salesrep Tax ST #965 ☐ Ticket Ready

Cust # Short Name Parking Space Route# Pay Method

Name Rewards ☐ Primary Phone Text ☐ AutoFlow ☐ PO#

Address Ship To/Bill To ☐ Alt Phone

City St Zip Email Email Note

Tag# Year Make Model Engine Mileage Clear

Ref#	Product #	Description	Link	Qty	Unit Price	Unit FET	Amount	Tech	Dept	Price Code	Tax Code	Sales
Goods Service Fet Subtotal Sales Tax Total 0.00 0.00 0.00 0.00 0.00 0.00												

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

H Quick Ticket History

Years: From: To:

Show Future Dates: ☒

Tag:

All Stores: ☒

Current Owner Only: ☒

Type: ☒ All ☐ Workorder ☐ Quote

Status: ☒ All ☐ Open ☐ Closed

Items To Show: ☒ Open/Billed ☒ Declined ☐ Rebilled ☒ Hidden ☒ Legacy

Item Filters

Dept(s) Filter:

Product Filter:

Show Cost: ☐

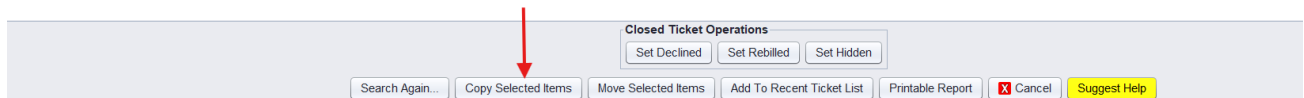
Max Tickets:

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	125880	Closed Workorder				0.00							150000.0
			TIRE STORAGE	TIRE STORAGE - PER SET	1.00	80.0000	80.00	2	R	7	-965	5		
			PCDI	ITEMS ADJUSTED BY \$20.00	-1.00	20.0000	-20.00	0	R	1	-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		

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
			TIRE STORAGE	TIRE STORAGE - PER SET	1.00	80.0000	80.00	2	R	7	-965	5		
			PCDI	ITEMS ADJUSTED BY \$20.00	-1.00	20.0000	-20.00	0	R	7	-965	5		
			TCOP	TIRE CHANGE OVER PLY	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		



Closed Ticket Operations
 Set Declined Set Rebilled Set Hidden
 Search Again... Copy Selected Items Move Selected Items Add To Recent Ticket List Printable Report Cancel Suggest Help

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**.

 DOT Registration Info

24655036 - 215/60R16 WESTLAKE RP18

Manufacturer:

Quantity: Dot #:

1. Suspicious/Bad DOT#'s reported to management.
 2. DOT#'s validated for correct format on entry, sent for registration at store closing.
 3. HITS is integrated with CIMS for automated DOT# registration. Contact HITS Support for more info.

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	TIRE DISP	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

I. 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*.

Line #	Product #	Description	Unit C
1008	24655036	215/60R16 WESTLAKE RP18	
Available	Quantity	Price Code	Unit Price
0.00	1.00	1 - Price 1 (\$100.57)	100.5700
			Unit FET
			0.00

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

Line #	Product #	Outside Part#	Description
0	OPT	W322098	PIRELLI C2
Available	Quantity	Price Code	Unit Price
10000.00	1.00	8 - GP (0.1000)	161.9900
			Unit FET
			0.00

DISCOUNT CATEGORIES:

There are two distinct categories of discounts that can be offered. **Standing loyalty discounts** 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 can 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.

Ticket View/Edit [91]													
Main		Line Items		Appointments/Status		Customer Info		Vehicle Info		Payments			
Ref#	Product #	Description	Link	Qty	Unit Price	Unit FET	Amount	Tech	Dept	Price Code	Tax Code	Salesrep	Last Modified By
1000	OPP (D3920302)	CERAMIC BRAKE PADS		1.0	123.9900		123.99	HOUSE	C	K	1	ROBERT R.	AATECH
1002	MECH	BRAKE PAD INSTALLATION		1.0	120.0000		120.00	HOUSE	E	K	0	ROBERT R.	AATECH
1004	>>>>>>>>>>>>	PACKAGE TOTAL		1.0				HOUSE	Z	0	0	ROBERT R.	AATECH
1006								HOUSE	Z	0	0		
1008	24655036	215/60R16 WESTLAKE RP18		1.0	100.5700		100.57	HOUSE	I	1	1	ROBERT R.	AATECH
1010	DSMP	DISMOUNT & MOUNT		1.0	20.0000		20.00	HOUSE	E	0	0	ROBERT R.	AATECH
1012	TIREDISP	TIRE DISPOSAL		1.0	2.5000		2.50	HOUSE	H	1	0	ROBERT R.	AATECH
1014	PPW	PROMISE PLUS WARRANTY PLAN		1.0	17.0000		17.00	HOUSE	G	1	0	ROBERT R.	AATECH
1016	DOT## (24655036)	WESTLAKE C69LXYZ1013		1.0				HOUSE	J	0	0	ROBERT R.	AATECH
1018	SS9H 5788	SHOP SUPPLIES-ENVIRONMENT FEES		1.0	2.5000		2.50	HOUSE	J	0	0	ROBERT R.	AATECH

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

Adjust Ticket Price

Discount Type

COMMERICAL/ FLEET DISCOUNT (PCD!FLEET)

Show Hidden

Description

COMMERICAL/ FLEET DISCOUNT

Current Price

148.60

Target Price

148.60

☒ Target Price

☐ Dollar Discount

☐ Percent Discount

☐ Warranty Discount

☐ Target Price Is Before Sales Tax

NOTICE: If PCD! item is TAXABLE, Adjusted Price may be off by +/- \$.01.

If non-taxable adjustments are permitted, set PCD! to non-taxable in the Inventory Master File.

The symbol "###" in Description will be replaced by the adjustment amount or percentage.

The symbol "@@@" in Description will be replaced by the word "Ticket".

Adjust Ticket Price

Cancel

Help

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.

Ticket GP%	20.9	Ticket GPS	218.56	Store GP%	58.6	Store GPS	6419.63	Subtotal	104
Product #		Description				Unit Cost w/FET			
001145		235/50R19 BLIZZAK WS-90 STUCL				207.31			
available	Quantity	Price Code	Unit Price	Unit FET	Tax Code	Amount			
0.00	4.00	3 - Price 3 (\$235.00)	235.0000	0.00	1 - Tax Code 1 (7.00%)	940.00			

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

H

Apply Pricing Factor

X

Cost With FET	207.31
FET	
Cost NO FET	207.31

GP Factor	0.1178	(0.0000 - 0.9999)
Markup Factor	1.1336	(1.0000 - 1.9999)
Dollar Add Factor	27.6900	(2.0000 Or More)

Price	235.00
-------	--------

New Factor	
New Price	256.00

☒ Use Cost NO FET
 ☐ Use Cost With FET

↓

Apply

X Cancel

Suggest Help

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-”

PCDIFLEET	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)”

- I.e. 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.

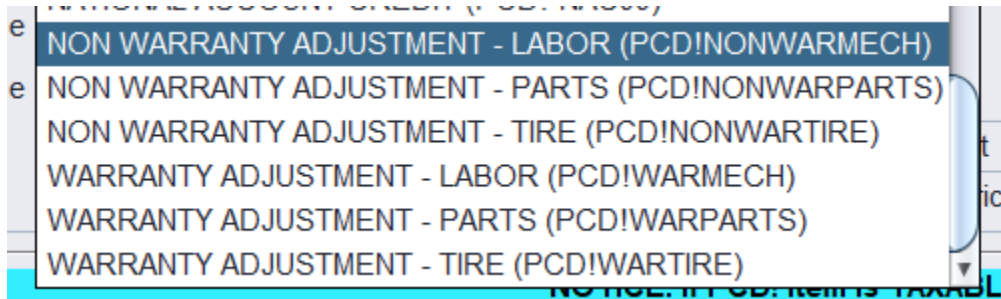
Undo / Delete

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.

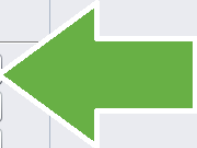
1. On the payment screens, click the **Process Credit Card** button to send the amount to the credit card machine to be processed.

Ticket View/Edit (91)

[Main](#)
[Line Items](#)
[Appointments/Status](#)
[Customer Info](#)
[Vehicle Info](#)
[Payments](#)

[Cash/Check/Credit Card](#)
[A/R Charge On Account](#)
[Advance Payment](#)
[National Account](#)

Total	679.88
Advanced Pmt/Credit	0.00
Cash & Checks Tendered	0.00
Check/Cash #1 SELECT...	Check/Cash #1 Amount 0.00 Process Check
Check/Cash #2 SELECT...	Check/Cash #2 Amount 0.00 Process Check
Change	0.00
Credit Card #1	Credit Card #1 Amount 0.00 Process Credit Card
Credit Card #2	Credit Card #2 Amount 0.00 Process Credit Card
Credit Card #3	Credit Card #3 Amount 0.00 Process Credit Card
Credit Card #4	Credit Card #4 Amount 0.00 Process Credit Card
Balance Due	679.88



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

Credit Card Sale

Order

Order Number:

Cashback:

Tax Amount:

☐ Tax Exempt

Total Amount:

Address

City:

State:

Zip:

Phone:

Email:

Credit Card

Name:

Number:

Expiration: CVV:

☐ This is a Card Present transaction

Waiting for swipe, tap, or insert...

Request signature

Voice Auth Capture

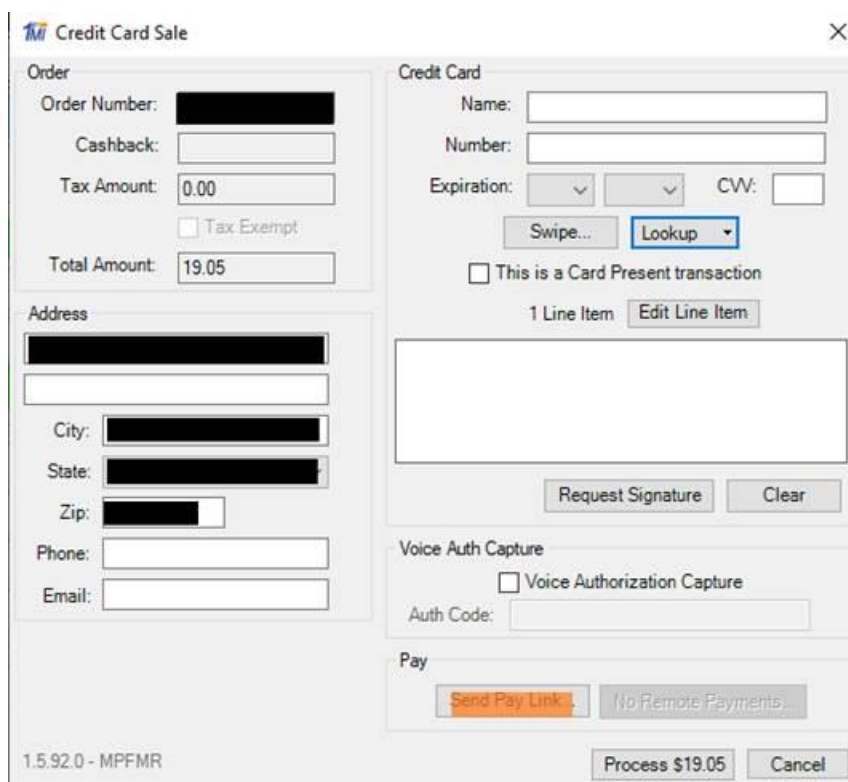
☐ Voice Authorization Capture

Auth Code:

Pay

1.5.92.0 - MPFMR

- Send Pay Link



Credit Card Sale

Order

Order Number: [Redacted]
Cashback: [Redacted]
Tax Amount: 0.00
☐ Tax Exempt
Total Amount: 19.05

Address

[Redacted]
[Redacted]
City: [Redacted]
State: [Redacted]
Zip: [Redacted]
Phone: [Redacted]
Email: [Redacted]

Credit Card

Name: [Redacted]
Number: [Redacted]
Expiration: [Redacted] [Redacted] CW: [Redacted]
Swipe... **Lookup**
☐ This is a Card Present transaction
1 Line Item **Edit Line Item**

[Redacted]

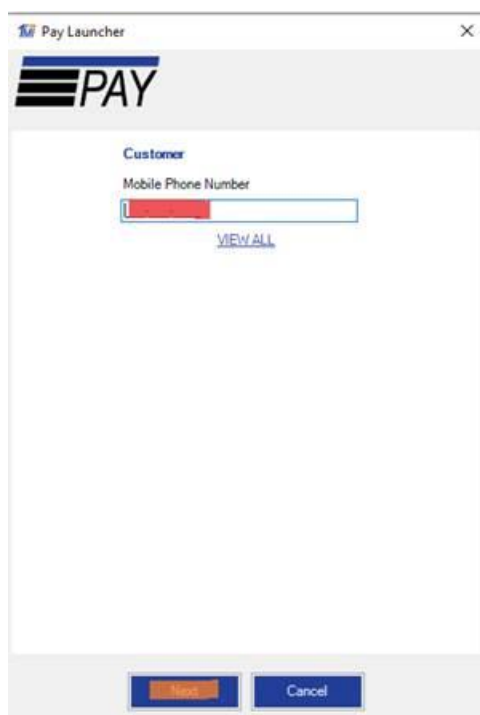
Request Signature **Clear**

Voice Auth Capture
☐ Voice Authorization Capture
Auth Code: [Redacted]

Pay
Send Pay Link **No Remote Payments**

1.5.92.0 - MPFMR **Process \$19.05** **Cancel**

5. Enter customer phone number, Next.



Pay Launcher

PAY

Customer
Mobile Phone Number
[Redacted]
[VIEW ALL](#)

Next **Cancel**

6. Enter customer name, Select message, Next.

Pay Launcher

PAY

Pay Form: [REDACTED]

Customer Name
[REDACTED]

Please Select Message
[REDACTED]

[EDIT VARIABLES](#)

Work Order Number
[REDACTED]

Tax
[REDACTED]

Total Amount
19.05

Work Order (PDF) [Clear](#)

[REDACTED]

[SELECT WORK ORDER](#)

[Next](#) [Cancel](#)

7. Click check box, Send

Pay Launcher

PAY

[Review](#) [REDACTED]

[REDACTED] - Gills Point S

Message:
Thank you for your business.

Work Order: [REDACTED]

Subtotal	\$19.05
Tax	\$0.00
Total Amount	\$19.05

☒ I acknowledge that I have received verbal authorization from the consumer to send text messages to his/her mobile device.

[EDIT](#)

[Send](#) [Cancel](#)

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



9. Repeat steps 1 & 2

Main Line Items Appointments/Status Links Customer Info Vehicle Info Payments			
Cash/Check/Credit Card A/R Charge On Account Advance Payment National Account			
		Total	104.05
		Advanced Pmt/Credit	0.00
		Cash & Checks Tendered	85.00
Check/Cash #1	CASH	Check/Cash #1 Amount	85.00
Check/Cash #2	SELECT	Check/Cash #2 Amount	0.00
		Change	0.00
Credit Card #1		Credit Card #1 Amount	0.00
Credit Card #2		Credit Card #2 Amount	0.00
Credit Card #3		Credit Card #3 Amount	0.00
Credit Card #4		Credit Card #4 Amount	0.00
		Balance Due	19.05

The screenshot shows the 'Credit Card Sale' window. On the left, the 'Order' section displays: Order Number (redacted), Cashback (empty), Tax Amount (0.00), Total Amount (19.05), and a 'Tax Exempt' checkbox. Below this is the 'Address' section with fields for City, State, Zip, Phone, and Email. The 'Credit Card' section on the right includes fields for Name, Number, Expiration, and CVV, along with a 'Swipe' button, a 'Lookup' dropdown, and a checkbox for 'This is a Card Present transaction'. A modal window titled 'Ingenico Lane/7000' is overlaid in the center, displaying 'Waiting for swipe, tap, or insert...' with a green progress bar and a 'Cancel' button. At the bottom right, there are buttons for 'Process \$19.05' and 'Cancel'. The version '1.5.92.0 - MPFMR' is visible in the bottom left corner.

10. Click Remote Payment

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

This screenshot shows the 'Credit Card Sale' window after the payment modal has been closed. The 'Credit Card' section now shows '1 Line Item' and an 'Edit Line Item' button. In the 'Pay' section, the 'Send Pay Link...' button is highlighted with an orange border, and next to it is a button labeled '1 Remote Payment' in orange. The 'Process \$19.05' and 'Cancel' buttons remain at the bottom right. The version '1.5.92.0 - MPFMR' is still visible in the bottom left corner.

11. Select the appropriate payment, View

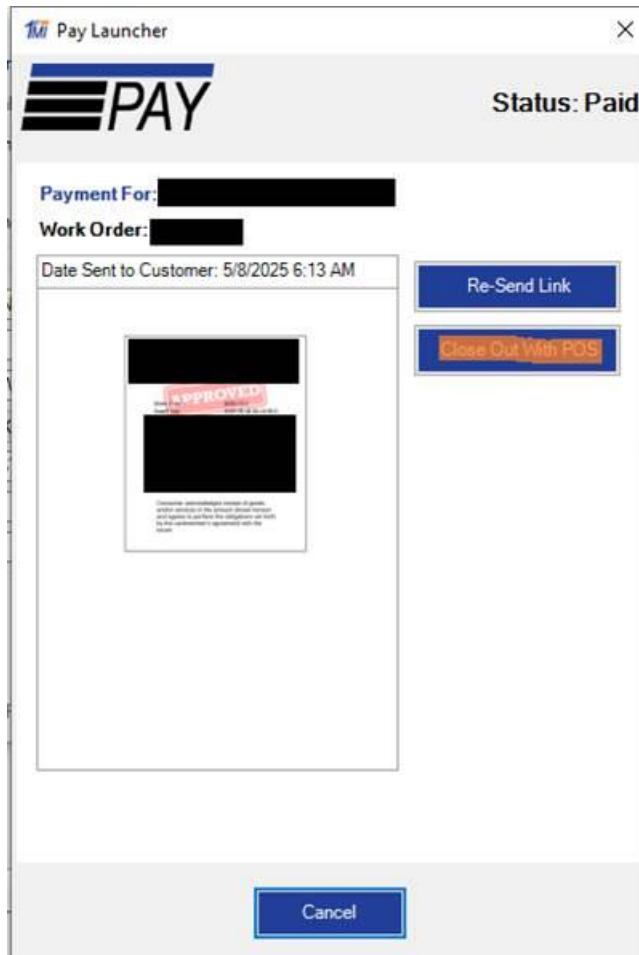
Pay Status [X]

Status: Paid Date Range: Past 7 Days Lookup

Status	Type	Date	Mobile Phone	Name	Work Order	Total Amount
Paid	Pay Log	5-8-2025 8:15 AM				\$12.00

View New

12. Review the payment and click Close Out With POS



Pay Launcher [X]

PAY Status: Paid

Payment For: [REDACTED]

Work Order: [REDACTED]

Date Sent to Customer: 5/8/2025 6:13 AM

[RE-Send Link]

[Close Out With POS]

[APPROVED]

[Cancel]

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.

Ticket View/Edit (91)

Main | Line Items | Appointments/Status | Customer Info | Vehicle Info | Payments

Ticket # 91 Copy # Date 03/10/2025 Salesrep 1 - ROBERT REVERMANN Tax Taxable ST #5788 OPEN WORKORDER Ticket Ready

Cust # 102216 Short Name WAGSTAFF Parking Space Route# Pay Method NONE SELECTED

Name CRAIG WAGSTAFF Primary Phone (208) 830-3587 Text PO#

Address 3000 SOUTH WAGMORE Ship To/Bill To X Alt Phone Email Note

City NAMPA St ID Zip 83687 Email

Tag# ASD1234 Year 2013 Make FORD Model F150 Engine Mileage 0 Clear

Product Inventory Quick Code Service Package TireCAT ServiceCAT LubeCAT Specs Comment

Ref#	Product #	Description	Link	Qty	Unit Price	Unit FET	Amount	Tech	Dept	Price Code	Tax Code	Salesrep	Last Modified By
1000	OPT (1431351)	215/60R16 95VONE		4.0	135.9900		543.96	HOUSE	3	1	1	ROBERT R	AATECH
1002	DSMP	DISMOUNT & MOUNT		1.0	20.0000		20.00	HOUSE	E	0	0	ROBERT R	AATECH
1004	TIREDISP	TIRE DISPOSAL		4.0	2.5000		10.00	HOUSE	H	1	0	ROBERT R	AATECH
1006	PPW	PROMISE PLUS WARRANTY PLAN		4.0	17.0000		68.00	HOUSE	G	1	0	ROBERT R	AATECH
1008	SS99-5788	SHOP SUPPLIES/ENVIRONMENT FEES		1.0	5.2800		5.28	HOUSE	J	0	0	ROBERT R	AATECH

Goods 543.96 Service 103.28 Subtotal 647.24 Sales Tax 32.64 Total 679.88

Customer View Full View ServiceCAT LubeCAT Inspect Specs Customer History Vehicle History Override Credit Hold Adjust Total

Contacts Refresh Consolidate Print Close Void Ticket Save Save & Exit Exit Help

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

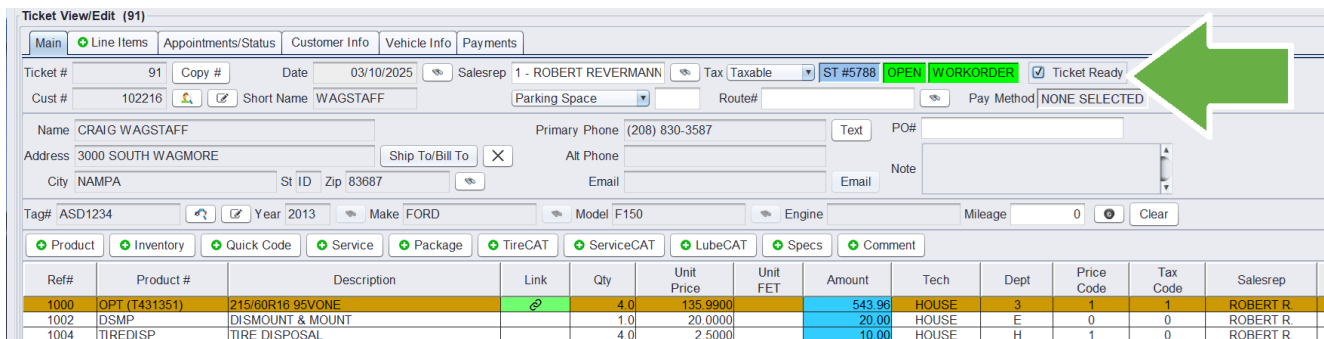
Error

You must enter a vendor number, invoice#, and date for ALL non-stocking items before you can close this ticket.

OK Copy Text

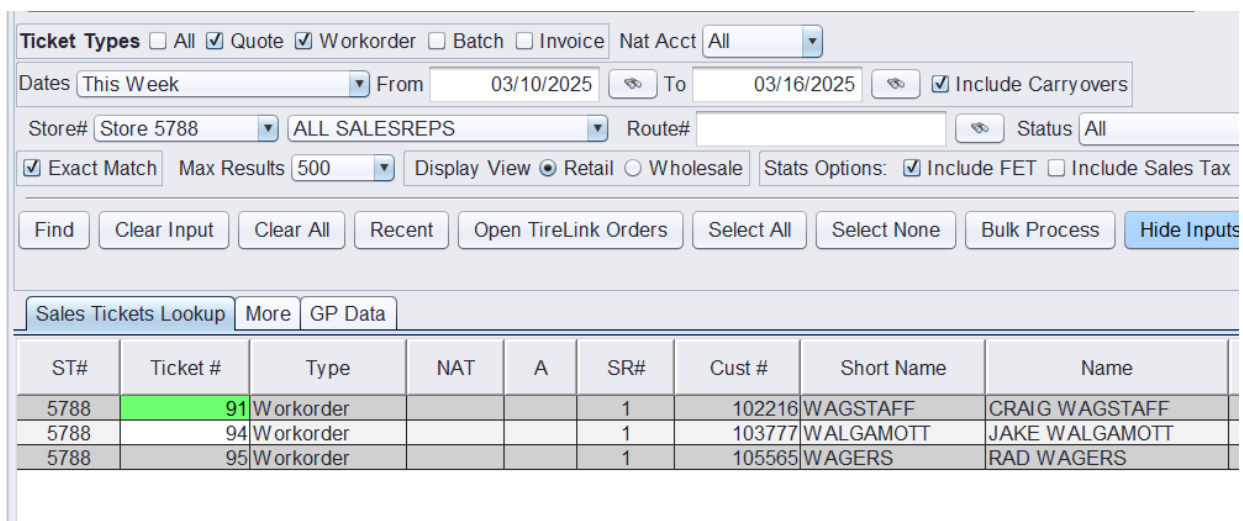
Once the ticket is ready to be closed, you can use the **Ticket Ready** checkbox to alert your team that the ticket is ready to be checked out.

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



Ref#	Product #	Description	Link	Qty	Unit Price	Unit FET	Amount	Tech	Dept	Price Code	Tax Code	Salesrep
1000	OPT (T431351)	215/60R16 95VONE		4.0	135.9900		543.96	HOUSE	3	1	1	ROBERT R
1002	DSMP	DISMOUNT & MOUNT		1.0	20.0000		20.00	HOUSE	E	0	0	ROBERT R
1004	TIREDISP	TIRE DISPOSAL		4.0	2.5000		10.00	HOUSE	H	1	0	ROBERT R

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



ST#	Ticket #	Type	NAT	A	SR#	Cust #	Short Name	Name
5788	91	Workorder			1	102216	WAGSTAFF	CRAIG WAGSTAFF
5788	94	Workorder			1	103777	WALGAMOTT	JAKE WALGAMOTT
5788	95	Workorder			1	105565	WAGERS	RAD WAGERS

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

Ticket View/Edit (91)

Main **Line Items** Appointments/Status Customer Info Vehicle Info Payments

Cash/Check/Credit Card **A/R Charge On Account** Advance Payment National Account

1 2 T 3 679.88

Advanced Pmt/Cr 0.00

Cash & Checks Tendered 0.00

Check/Cash #1 SELECT... 0.00 Process Check

Check/Cash #2 SELECT... 0.00 Process Check

Change 0.00

Credit Card #1 0.00 Process Credit Card

Credit Card #2 0.00 Process Credit Card

Credit Card #3 0.00 Process Credit Card

Credit Card #4 0.00 Process Credit Card

Balance Due 679.88

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.

Ticket View/Edit (91)

Main **Line Items** Appointments/Status Customer Info Vehicle Info Payments

Cash/Check/Credit Card **A/R Charge On Account** Advance Payment National Account

Total 679.88

Balance 679.88

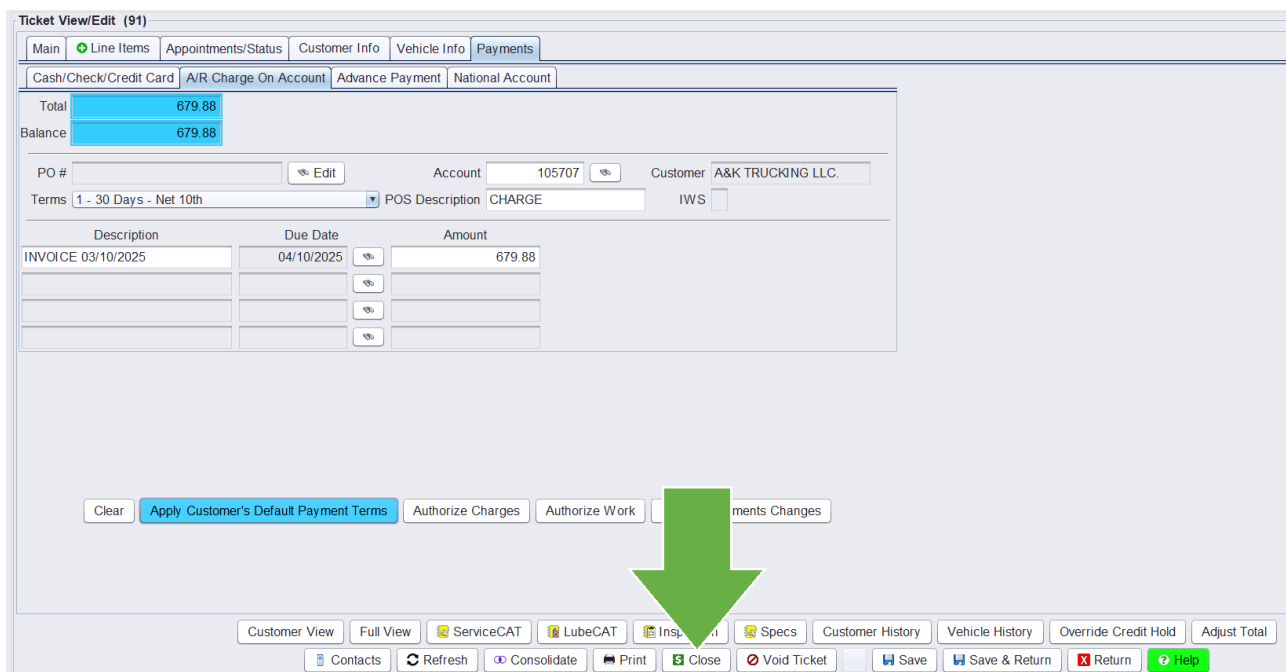
PO # Edit Account 105707 Customer A&K TRUCKING LLC.

Terms 1 - 30 Days - Net 10th POS Description CHARGE IWS

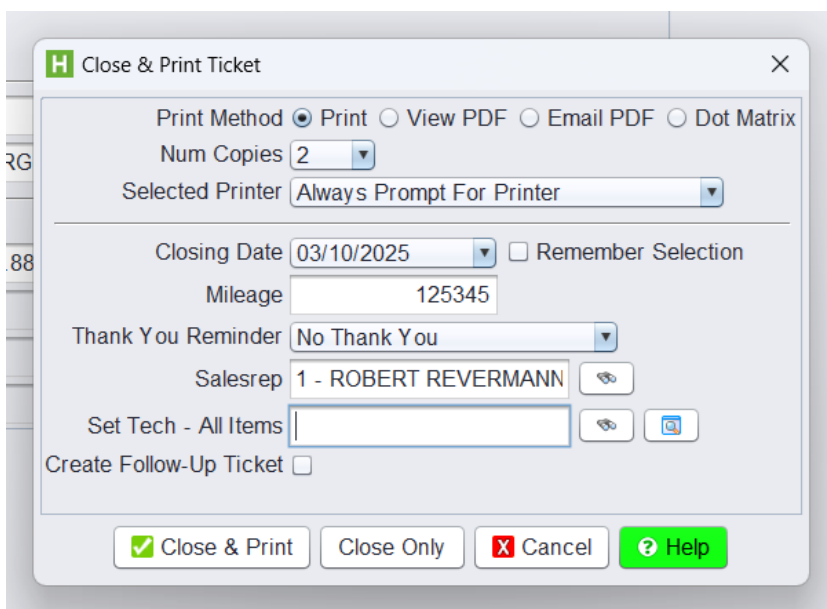
Description	Due Date	Amount
INVOICE 03/10/2025	04/10/2025	679.88

Clear **Apply Customer's Default Payment Terms** Authorize Charges Authorize Work Discard Payments Changes

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 screenshot shows the 'Ticket View/Edit (91)' window. The 'Payments' tab is selected in the top navigation bar. Within the 'Payments' tab, the 'Advance Payment' sub-tab is selected. A table with columns 'Allocate Inv #', 'Date', 'Description', and 'Amount' is visible. A green arrow points to the 'Advance Payment' sub-tab. Another green arrow points to the 'Make Payment' button at the bottom of the window. Other buttons at the bottom include 'Allocate ROA Credit', 'Remove Allocation', and 'Print'.

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**.


Create Advanced Payment

×

Main
Summary

Invoice #
91
Optional

Customer #
105705

Name
A&A MOBILE SERVICES LLC

Address
605 IDAHO ST

Address2

City
GOODING
State
ID
Zip
83330

Contact
Phone
2083160819

Type
PAYMENT

Amount
100.00
Process Credit Card
Process Check

CC/Cash
CHECK
Check #

Description
Paid By Check

Transaction Date
03/10/2025

Due Date

Create PAYMENT
Cancel
Suggest Help

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.

Allocate Inv #	Date	Description	Amount
91	03/10/2025	Paid By Check	100.00

Make Payment
Allocate ROA Credit
Remove Allocation
 Print

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.

Ticket View/Edit (91)

Main
 Line Items
Appointments/Status
Customer Info
Vehicle Info
Payments

Cash/Check/Credit Card
A/R Charge On Account
Advance Payment
National Account

Total
647.24

Advanced Pmt/Credit
100.00

Cash & Checks Tendered
0.00

Check/Cash #1 SELECT...

Check/Cash #1 Amount 0.00
Process Check

Check/Cash #2 SELECT...

Check/Cash #2 Amount 0.00
Process Check

Change
0.00

Credit Card #1 SELECT...

Credit Card #1 Amount 0.00
Process Credit Card

Credit Card #2 SELECT...

Credit Card #2 Amount 0.00
Process Credit Card

Credit Card #3 SELECT...

Credit Card #3 Amount 0.00
Process Credit Card

Credit Card #4 SELECT...

Credit Card #4 Amount 0.00
Process Credit Card

Balance Due
547.24

p. National Accounts

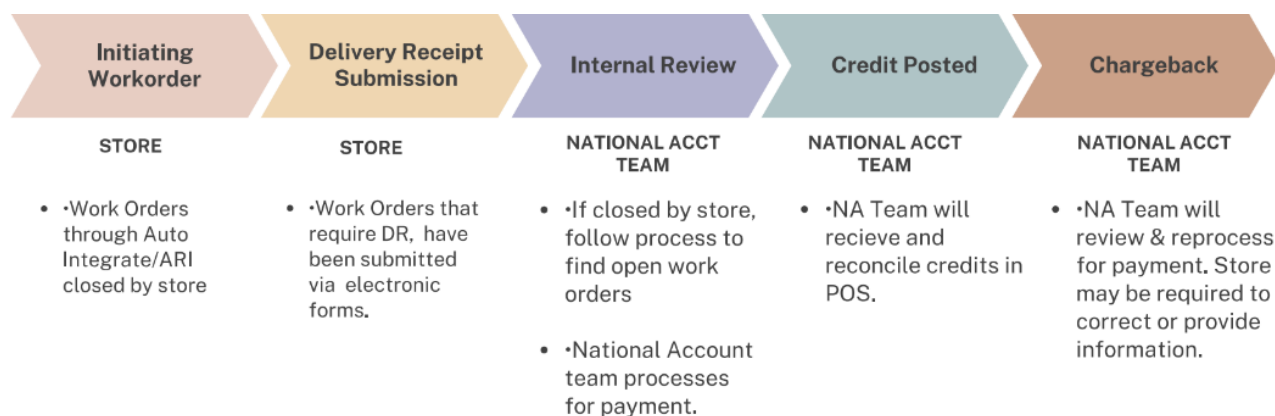
Customers who have a National Account will need to be properly set up with a National Account Ship To/Bill To.

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

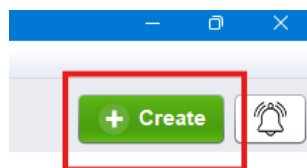
**Important:* If this is a work order for a fleet vehicle, please follow the appropriate billing procedure in the vendor portals such as Auto Integrate & ARI/Holman Partner Connect. Before billing the work order in HITS, please ensure you know the correct payment direction.

(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.

Ticket View/Edit (91)

Main | + Line Items | Appointments/Status | Customer Info | Vehicle Info | Payments

Ticket # 91 Copy # Date 03/10/2025 Salesrep 1 - ROBERT REVERMANN Tax No Tax
 Cust # 105705 Short Name A&A Parking Space Route# E
 Name A&A MOBILE SERVICES LLC (208) 316-0819
 Address 605 IDAHO ST Ship To/Bill To
 City GOODING St ID Zip 83330 Email alolsen913@gmail.com
 Tag# Year Make Model Eng

+ Product + Inventory + Quick Code + Service + Package + TireCAT + ServiceCAT + LubeCAT + Sp

Ref#	Product #	Description	Link	Qty	Unit Price	Unit FET
1000	OPT (T431351)	215/60R16 95VONE		4.0	135.9900	
1002	DSMP	DISMOUNT & MOUNT		1.0	20.0000	
1004	TIREDISP	TIRE DISPOSAL		4.0	2.5000	
1006	PPW	PROMISE PLUS WARRANTY PLAN		4.0	17.0000	
1008	SS99-5788	SHOP SUPPLIES/ENVIRONMENT FEES		1.0	5.2800	

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.

Vehicle Details	RO Details	FMC Details	Shop Details	Client Details	OEM Options	AME Details	Driver Inquiries	Active Recalls
Shop Name Ed's Point S Tire - Medford		Shop Tel 541-779-3421		Invoice Number 2576367		Shop Contact El		Payment Direction
Shop Address 2390 N.PACIFIC HWY., MEDFORD, OR, 97501		Payment Type National Invoice		Store # 147330		Has Registered Yes		Shop Call Back Number Not Specified
Shop Fax #		Shop Email el@pointstire.com						

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.

H Ship To Addresses		
Type	Display Name	Address
Primary	A&A MOBILE SERVICES LLC	605 IDAHO ST
Ship To/Bill To	GOODYEAR NATIONAL ACCOUNTS	

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.

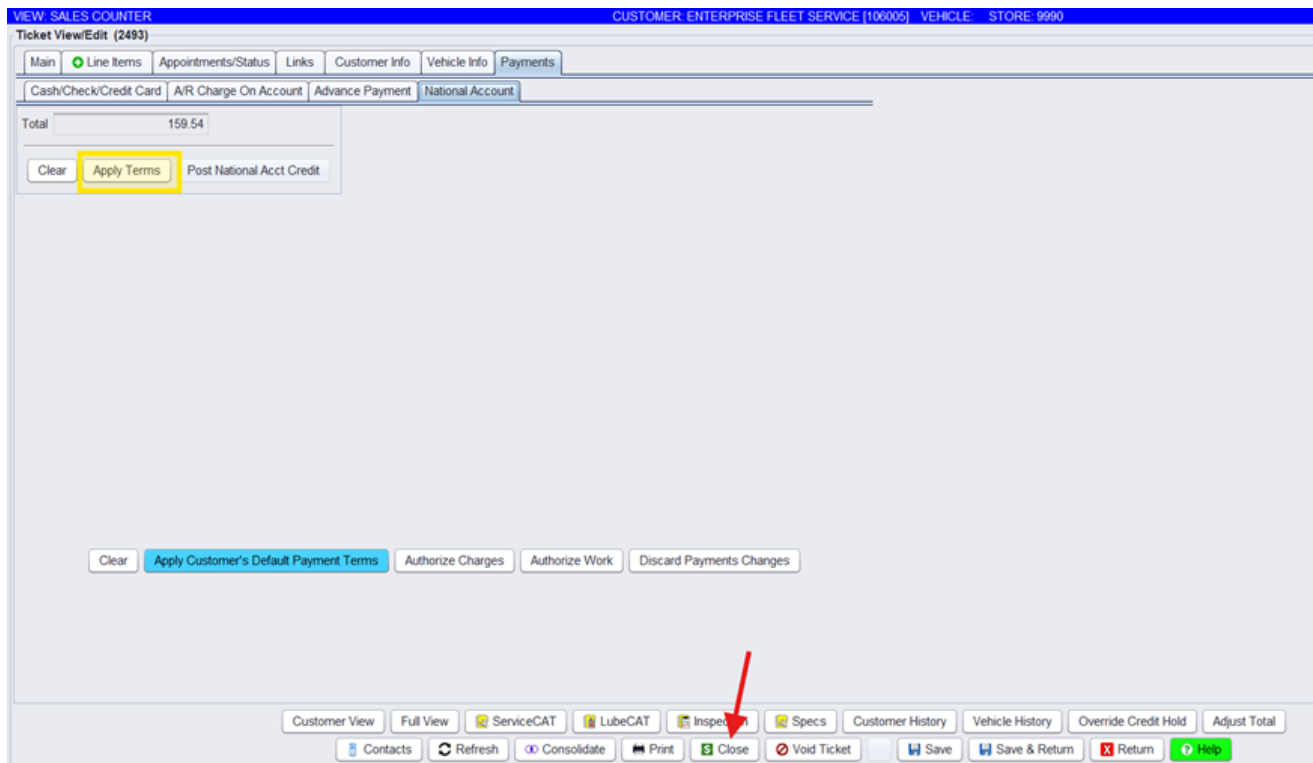
Product #	MFG	Size	Description	Qty St
NA-BD			NAT ACCT - BALANCE DIAGNOSTIC	
NA-BS			NAT ACCT - BALANCE STANDARD	
NA-CPT			NAT ACCT - COOLANT PRESSURE TEST	
NA-DIAGALI			NAT ACCT - ALIGNMENT DIAGNOSTIC	
NA-DIAGCOO			NAT ACCT - COOLANT SYSTEM DIAGNOSTIC	
NA-DIAGDRI			NAT ACCT - DRIVE TRAIN DIAGNOSTIC	
NA-DIAGELE			NAT ACCT - ELECTRICAL DIAGNOSTIC	
NA-DIAGEN			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.



VIEW: SALES COUNTER CUSTOMER: ENTERPRISE FLEET SERVICE (100005) VEHICLE: STORE: 9990

Ticket View/Edit (2493)

Main Line Items Appointments/Status Links Customer Info Vehicle Info Payments

Cash/Check/Credit Card A/R Charge On Account Advance Payment National Account

Total 159.54

Clear Apply Terms Post National Acct Credit

Clear Apply Customer's Default Payment Terms Authorize Charges Authorize Work Discard Payments Changes

Customer View Full View ServiceCAT LubeCAT Inspection Specs Customer History Vehicle History Override Credit Hold Adjust Total

Contacts Refresh Consolidate Print Close Void Ticket Save Save & Return Return Help

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

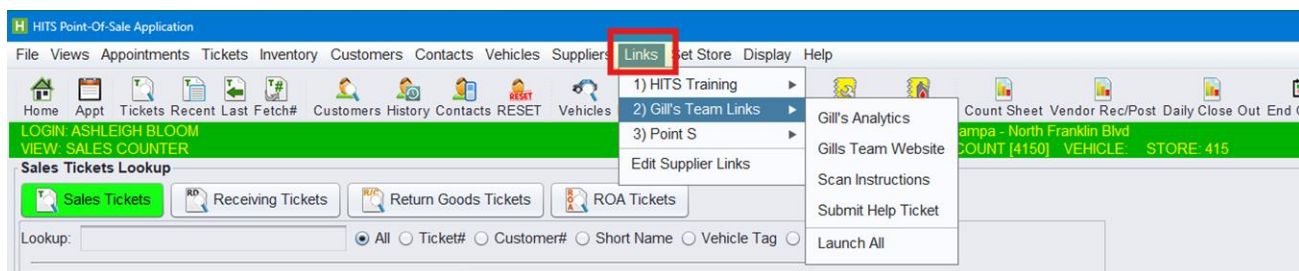
**Important:* For any commercial or “service call” work, and any purchases made through a government entity, must have a DR form filled out in entirety & provided to the National Account team for processing. Failure to submit a DR form will result in no payment being received.

(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.)

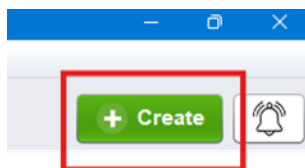
1. Submitting a DR form for National Accounts

- 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.

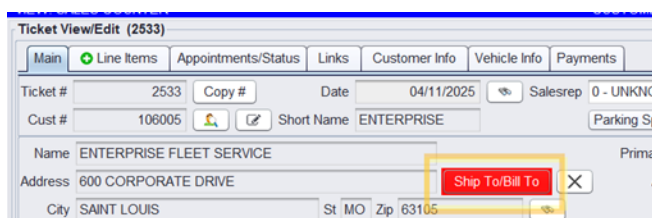


- c. Fill out the electronic delivery receipt form in entirety.
 - i. Failure to have the requested information when submitted will result in it being returned to correct.
- d. Once the form has been submitted, return the HITS POS.

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”.

Ship To Addresses

Type	Display Name	Address	City	State	Zip	Notes
Primary	ENTERPRISE FLEET SERVICE	600 CORPORATE DRIVE	SAINT LOUIS	MO	63105	
National Account	GOODYEAR NATIONAL ACCOUNTS	(BLANK)				
National Account	BRIDGESTONE NATIONAL ACCOUNT	(BLANK)				

Ship To/ Bill To's can be added to handle invoicing settings that deviate from the customer's primary invoicing settings. This may include an alternate shipping address, a redirected billing account#, or unique tax rules. Additionally national account setup is managed through the Ship To/Bill To module.

☒ Select

- 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.

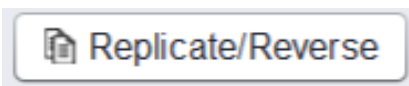
- a. The National Accounts Team will receive the DR and process payment within 24-48 hours.
8. The National Accounts Team will verify and close the work order once processed for payment.

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

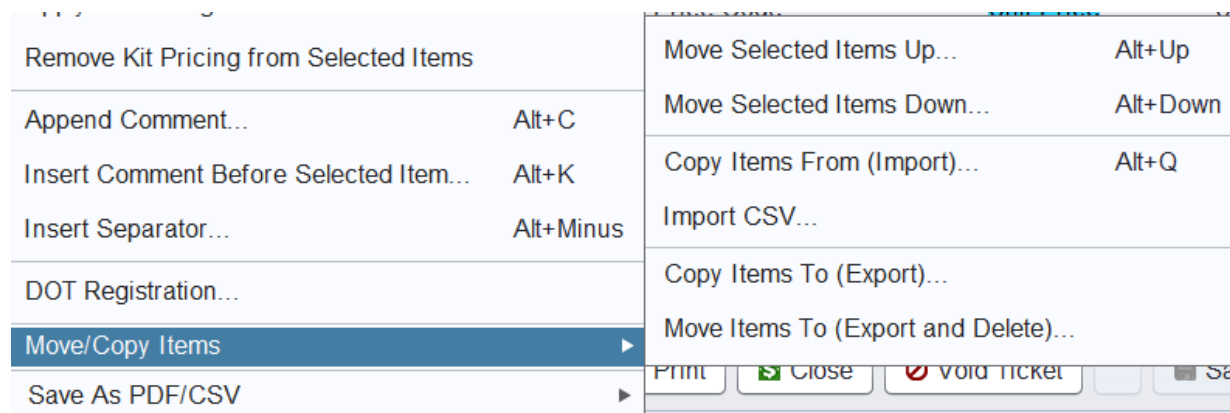
There may be cases for **Consolidate** customer's Quotes and Workorders. If the customer has multiple tickets, click the Consolidate button (button of the screen on the Main tab) to see tickets that are eligible for consolidation.



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.

Ticket View/Edit (119)

Main **Line Items** Appointments/Status Customer Info Vehicle Info Payments

Appointment Active ☒

Appointment Date 03/10/2025

Time 8:00 AM

Bay No Bay

Code General Appointment

Duration

Type Promised

Promised Date 03/10/2025

Time EOD

Customer Waiting No Suspended No

Confirmation No Confirmation

Resend Confirmation

Date

Time

Salesrep

Method Phone-To Person

Vehicle Status In Shop

Date 03/11/2025

Time 9:23 AM

Notify Mode No Notifications

Email Notify

Text Notify

Post Process Events

Appt Confirmation

Appt Reminders

Vehicle Ready

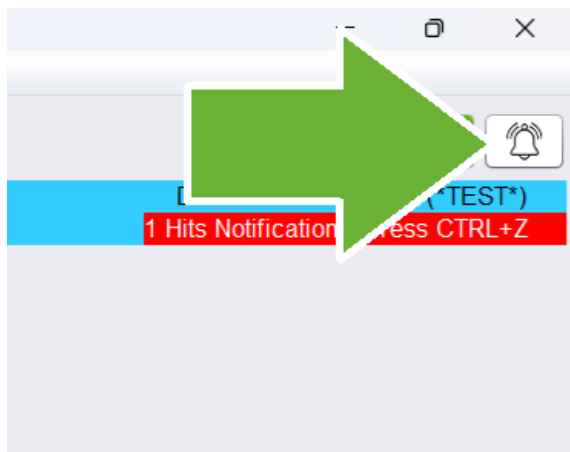
Discard Appointments/Status Changes Clear Appointment Clear Status/Notifications

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.

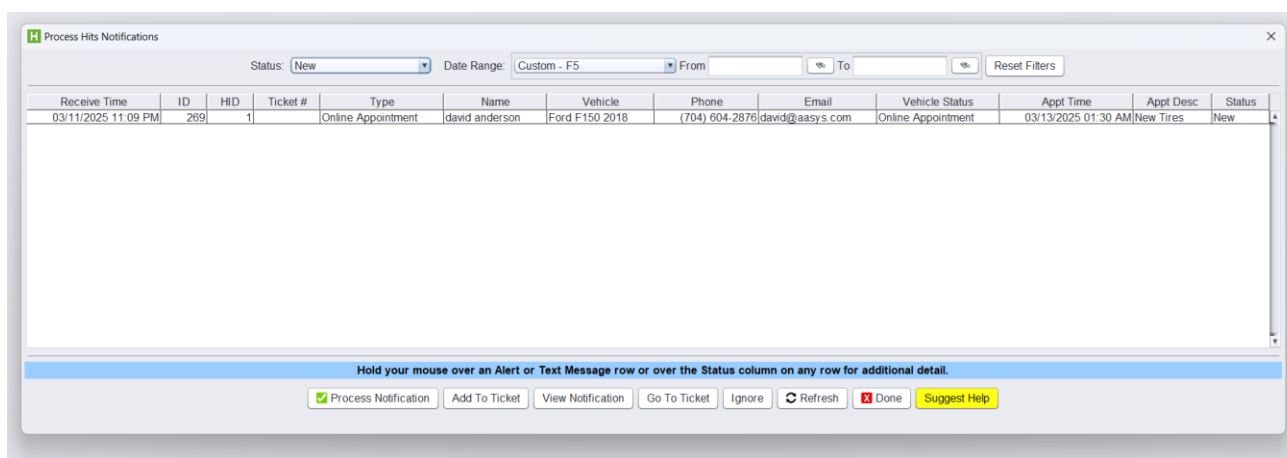
Consider Quotes will not allocate inventory and parts cannot be ordered from Quotes. Typically Quotes are the better ticket type to use for appointments set one-two weeks in the future, but if inventory needs to be allocated or parts ordered for the appointment, a Workorder is the best ticket type to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

Ticket View/Edit (-7399554)

Main  Line Items Appointments/Status Customer Info Vehicle Info Comments Payments

Appointment Active ☒

Appointment Date 

Time 

Bay

Code

Duration

Type

Promised Date

Vehicle Status 

Date 

Time 

Notify Mode

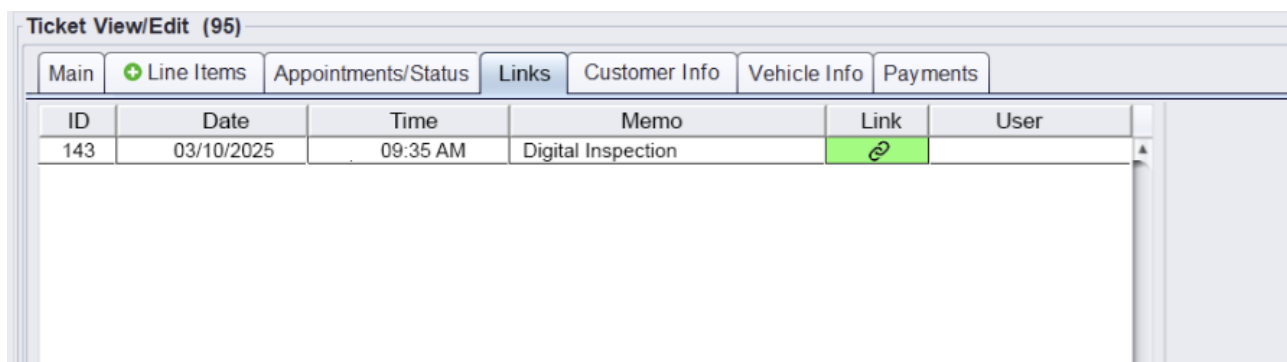
Email Notify

Text Notify

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.

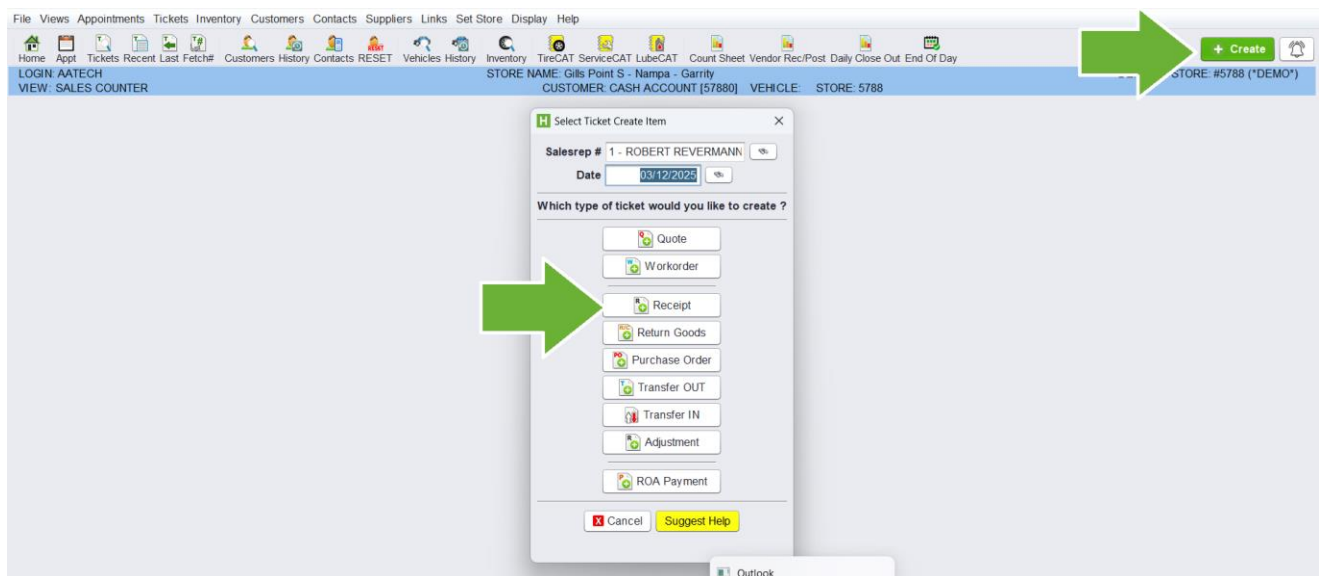
Type	Description	How To in HITS
Inventory products	Stocking inventory for which there is a unique product number (ie. 176236NXK)	Create > Receipt > Add product #, Qty, and Cost
Nonstock products	Nonstock product purchased for a customer's workorder (ie. OPP, OPT, OPW, etc.)	Add to Workorder with Vendor 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.

 Attention
✕

Do you want to use the active vendor/store displayed in the store's information bar at the top of the screen?

☒ OK
Select Vendor/Store
Reset To Misc Vendor

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.

Line #	Product #		Description	Average Cost
0	160060	 	215/60R16 TOYO ECLIPSE	80.84
	Available	Quantity	Unit Cost w/FET	Unit FET
	0.00	 4.00	80.8400	0.00
			Tax Code	Amount
			0 - No Tax	323.36
Salesrep		Dept		
1 - ROBERT REVERMANN		1 - TIRES		

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

Receipt/Transfer View/Edit (188)

Main **Line Items** Vendor/Store Info Comments **Payments**

Cash/Credit Payments

Total **323.36**

Misc Adjustment 0.00

Cash Tendered **0.00**

Check/Cash **SELECT...** Check/Cash Amount 0.00

Change **0.00**

Credit Card **SELECT...** Credit Card Amount 0.00

Balance Due 323.36

A/P Distributions

Vendor Inv# **19001922** Vendor Invoice Date **03/12/2025** Unit **SELECT...** Vendor **SELECT...**

Terms **No Terms** POS Description **SELECT...** HITS Ticket# Or PO# **SELECT...**

Description	Due Date	Amount

Clear Apply A/P Terms **Payments Changes**

Full Line Item View Quick **Close** Consolidate Tickets Import CSV

Contacts Refresh Print **Close** Save Save & Return Return Help

Click **Close** to finalize the Receipt

H Close & Print Ticket

Print Method ☒ Print ☐ View PDF ☐ Email PDF ☐ Dot Matrix

Num Copies **1**

Closing Date **03/12/2025** ☐ Remember Selection

Salesrep **1 - ROBERT REVERMANN**

Close & Print Close Only **Cancel** Suggest Help

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

Receiving Tickets Lookup

Lookup: ☒ All ☐ Ticket ☐ Vendor# ☐ Short Name ☐ Vendor Inv# ☐ HITS Ticket#/PO

Ticket Types ☐ All ☒ ☐ s ☐ Adjustments ☐ Purchase Order ☐ ASN
 Ticket Status ☐ All ☐ Open ☐ Closed

Dates Last Quarter To Date From 12/12/2024 To 03/12/2025 ☒ Include Carryovers
 Store 5788 ☒ Exclude Max Results 500

Scan Results

ST#	Ticket #	T	Status	SR#	Vend#	Short Name	Name	Start Time	Date	Total
5788	121	REC	CLOSED	1	101	AUTOZONE	AUTOZONE	03/11/2025 11:02 AM	03/11/2025	131.00
5788	102	REC	CLOSED	2	57880	MISC VEND	NAMPA - GARRITY	03/11/2025 07:58 AM	03/11/2025	382.76
5788	116	RG	CLOSED	2	57880	MISC VEND	NAMPA - GARRITY	03/11/2025 10:50 AM	03/11/2025	-382.76
5788	188	REC	CLOSED	1	100130		AMERICAN TIRE DISTRIBUTOR - WI	03/12/2025 08:08 AM	03/12/2025	323.36

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.

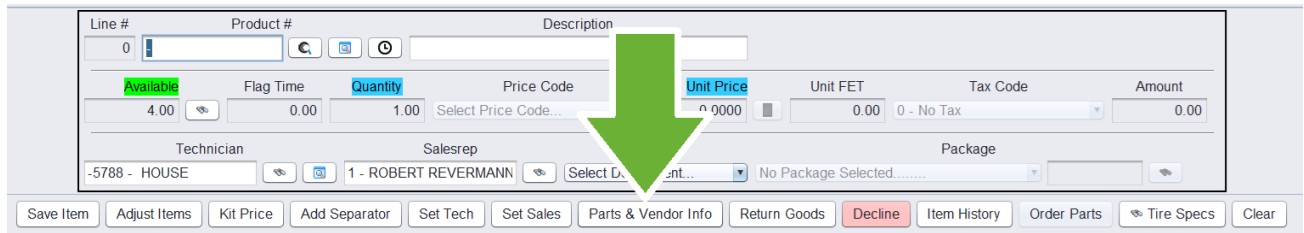
For nonstock parts added to customer Workorders, the system will **require** that Vendor; Outside Part #; Vendor Invoice #; Vendor Date be added to the Workorder before the Workorder can be closed.

Line #	Product #	Outside Part#	Description	Unit Cost w/FET	Vendor Code	Vendor Inv#	Vendor Date
1000	OPT	1023419	215/60R16 95HKINERGY PT H737	86.80	ATD	109838333	03/12/2025
Nonstock	Quantity	Price Code	Unit Price	Unit FET	Tax Code	Amount	Receiving Payment
4.00	4.00	Select Price Code...	117.9900	0.00	1 - Tax Code 1 (6.00%)	471.96	On Account
Technician		Salesrep		Dept		Package	
5788 - HOUSE		1 - ROBERT REVERMANN		3 - NON STOCK TIRES		(-100) PROMISE PLUS WARRANTY PLAN	

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



Line # 0 Product # Description

Available Flag Time Quantity Price Code Unit Price Unit FET Tax Code Amount

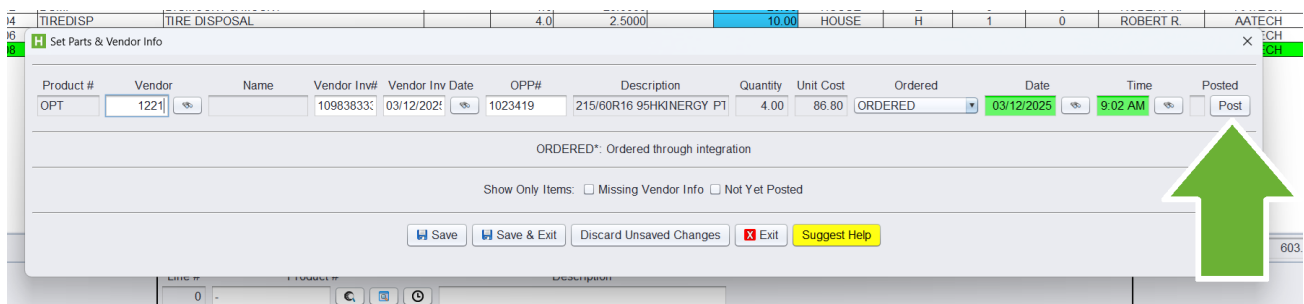
4.00 0.00 1.00 Select Price Code... 0.0000 0.00 0 - No Tax 0.00

Technician Salesrep Package

-5788 - HOUSE 1 - ROBERT REVERMANN Select Price Code... No Package Selected.....

Save Item Adjust Items Kit Price Add Separator Set Tech Set Sales Parts & Vendor Info Return Goods Decline Item History Order Parts Tire Specs Clear

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.



Product # Vendor Name Vendor Inv# Vendor Inv Date OPP# Description Quantity Unit Cost Ordered Date Time Posted

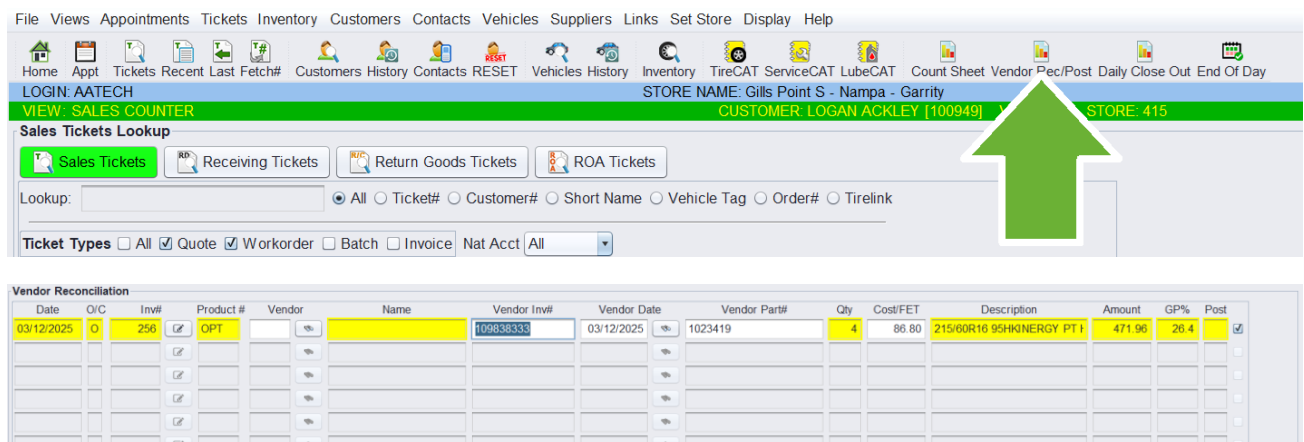
OPT 1221 10983833 03/12/2025 1023419 215/60R16 95HKENERGY PT 4.00 86.80 ORDERED 03/12/2025 9:02 AM

ORDERED*: Ordered through integration

Show Only Items: ☐ Missing Vendor Info ☐ Not Yet Posted

Save Save & Exit Discard Unsaved Changes Exit Suggest Help

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.



File Views Appointments Tickets Inventory Customers Contacts Vehicles Suppliers Links Set Store Display Help

Home Appt Tickets Recent Last Fetch# Customers History Contacts RESET Vehicles History Inventory TireCAT ServiceCAT LubeCAT Count Sheet Vendor Pec/Post Daily Close Out End Of Day

LOGIN: AATECH STORE NAME: Gills Point S - Nampa - Garrity

VIEW: SALES COUNTER CUSTOMER: LOGAN ACKLEY [100949] STORE: 415

Sales Tickets Lookup

Sales Tickets Receiving Tickets Return Goods Tickets ROA Tickets

Lookup: ☒ All ☐ Ticket# ☐ Customer# ☐ Short Name ☐ Vehicle Tag ☐ Order# ☐ Tirelink

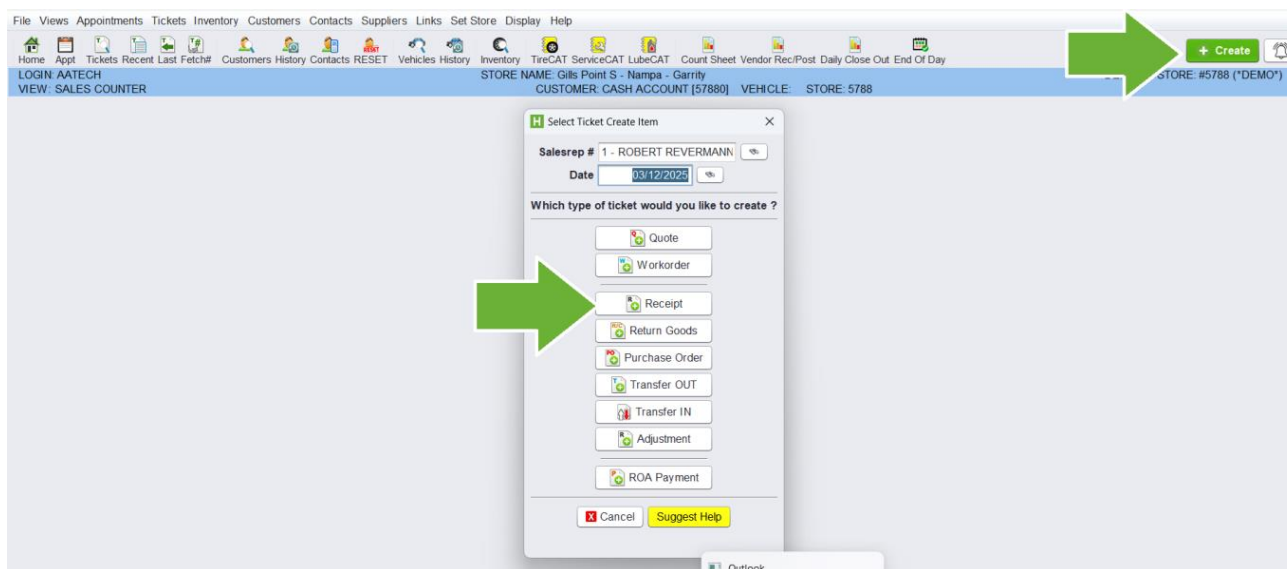
Ticket Types ☐ All ☒ Quote ☒ Workorder ☐ Batch ☐ Invoice Nat Acct All

Date	O/C	Inv#	Product #	Vendor	Name	Vendor Inv#	Vendor Date	Vendor Part#	Qty	Cost/FET	Description	Amount	GP%	Post
03/12/2025	O	256	OPT			10983833	03/12/2025	1023419	4	86.80	215/60R16 95HKENERGY PT	471.96	26.4	☒

c. Posting Expenses

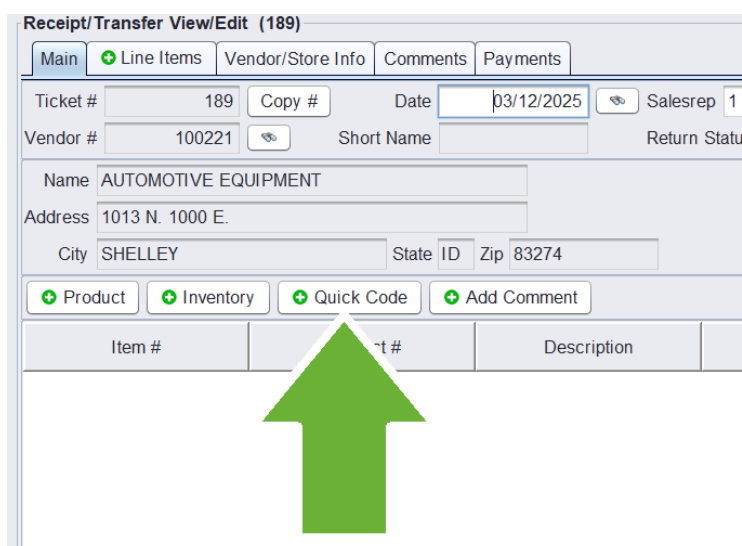
Ongoing expenses for vendors that invoice the shop such as laundry services and landscaping services will need to be posted into HITS.

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**.

H Quick Items Lookup

Services

Packages

Quick Codes

Product #	MFG	Size	Description	Qty St	Qty Corp	Aux	Price w/FET	GP%	V
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 - JANITORIAL						
X-LAUNDRY			EXPENSE - LAUNDRY						
X-LOBBY			EXPENSE - LOBBY						
X-OFFICE			EXPENSE- OFFICE SUPPLIES						
X-REPAIRBUILDING			EXPENSE - BUILDING 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.

Return Goods Tickets Lookup

Right-Click t

Store #	RG#	Status	Vendor	Product #	Vendor Part#	Description	Start Date
4	53826	Open	OREILLY (362)	OPP	9052	TAILORED RESISTOR IGNITION WIRE SET	08/30/2023 04:38 PM
4	56964	Open	ADVANCE AUTO (364)	OPP	GNAD726	FRONT CERAMIC PADS	10/31/2023 10:01 AM
4	53388	Open	AUTOZONE (363)	OPP	LS711	IGNITION SWITCH	08/21/2023 03:03 PM
4	53391	Open	AUTOZONE (363)	OPP	LC14510	IGNITION LOCK CYLINDER	08/21/2023 03:04 PM
4	53080	Open	OREILLY (362)	OPP	611-075	WHEEL LUG NUT	08/14/2023 10:14 AM
4	52377	Open	OREILLY (362)	OPP	A38002	FUEL PUMP MODULE ASSEMBLY	07/31/2023 11:47 AM
4	53082	Open	AUTOZONE (363)	OPP	30295	WHEEL CYLINDER	08/14/2023 10:15 AM
4	53404	Open	ADVANCE AUTO (364)	OPP	YH524448P	REAR DISC BRAKE ROTOR	08/22/2023 10:20 AM
4	52829	Open	AUTOZONE (363)	OPP	3032	PLATINUM PLUG	08/11/2023 09:35 AM
4	51549	Open	OREILLY (362)	OPP	33937	FUEL FILTER	07/15/2023 09:34 AM
4	52573	Open	OREILLY (362)	OPP	MS96252	PLENUM GASKET SET	08/04/2023 05:27 PM
4	52062	Open	AUTOZONE (363)	OPP	FF696DL	FUEL FILTER	07/27/2023 07:41 AM

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).

1012	OPP (9553N)	RIGHT NEW CV COMPLETE ASSEMBLY	1.0	150.2000	150.20	HOUSE
1014	OPL_B	REMOVE & REPLACE F AXLE SHAFT - ONE	1.4	120.0000	168.00	HOUSE
1016	-	-	1.0	-	-	HOUSE
1018	OPP (18750012)	SWAY BAR LINK OR KIT	1.0	57.7600	57.76	HOUSE
1020	OPL_B	REMOVE & REPLACE F STABILIZER BAR &/OR BUS	1.4	120.0000	168.00	HOUSE
1022	-	-	1.0	-	-	HOUSE
1024	OPP (955-1831)	DOOR MIRROR	1.0	96.0000	96.00	HOUSE
1026	OPL_B	REMOVE & REPLACE DOOR MIRROR	0.6	120.0000	72.00	HOUSE
1028	-	-	1.0	-	-	HOUSE
1030	OPP (DLG513206)	FRONT HUB ASSEMBLY	1.0	189.9900	189.99	HOUSE
1032	OPL_B	REMOVE & REPLACE WHEEL BEARING - FRONT, ON	1.0	120.0000	120.00	HOUSE
1034	-	-	1.0	-	-	HOUSE
1036	SS99.4	SHOP SUPPLIES	1.0	32.9800	32.98	HOUSE

Ticket GP% 76.3 Ticket GP\$ 804.59 Store GP% 100.0 Store GP\$ Subtotal

Line #	Product #	Description	Available	Quantity	Price Code	Unit Price	Tax Code
0			0.00	1.00	Select Price Code...	0.0000	Tax

Technician: -4 - HOUSE Salesrep: 0 - HOUSE SALESMAN Dept: Select Department... Package: Package Selected.....

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

H Return Selected Items

Vendor: 363 - AUTOZONE

Vendor Inv#: 1224409

Vendor Inv Date: 03/12/2025

Product #	Vendor Part#	Description
OPP	9553N	RIGHT NEW CV COMPLETE ASSEMBLY

Status: In Shop

☒ Create Individual Credit Receipts For Each Item

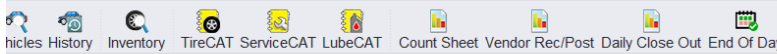
☒ Leave Items & Decline ☐ Delete Items From Ticket

Post Return & Await Credit X Cancel

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**.

Suppliers Links Set Store Display Help



+ Create


STORE NAME: Gills Point S - Nampa - North Franklin Blvd
 CUSTOMER: CASH ACCOUNT [4150] VEHICLE: STORE: 415

DEFAULT STORE: # "DEMO"

H Select Ticket Create Item

Salesrep #: 1 - MEGAN STEWART

Date: 03/12/2025

Which type of ticket would you like to create ?

 Quote

 Workorder

 Receipt

 Return Goods

 Purchase Order

 Transfer OUT

 Transfer IN

 Adjustment

This process is to be used if the item has already been initially received 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**.

Status	Vendor	Return Status	Product #	Vendor Part#	Description	
Open	OREILLY (362)	In Shop	OPP	9052	TAILORED RESISTOR IGNITION WIRE SET	08/20/2017
Open	ADVANCE AUTO (364)	In Shop	OPP	GNAD726	FRONT CERAMIC PADS	10/20/2017
Open	AUTOZONE (363)	In Shop	OPP	LS711	IGNITION SWITCH	08/20/2017
Open	AUTOZONE (363)	In Shop	OPP	LC14510	IGNITION LOCK	08/20/2017
Open	OREILLY (362)	In Shop	OPP	611-075	WHEEL LUG NUT	08/20/2017
Open	OREILLY (362)	In Shop	OPP	A38002	FUEL PUMP MOUNT	08/20/2017
Open	AUTOZONE (363)	In Shop	OPP	30295	WHEEL CYLINDER	08/20/2017
Open	ADVANCE AUTO (364)	In Shop	OPP	YH524448P	REAR DISC BRAKE	08/20/2017

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

Ticket #	Item #	Product #	Op Part #	Description	Expected Credit	Actual Credit	Vendor Invoice #	Vendor Date
53388	1000	OPP	LS711	IGNITION SWITCH	-41.57	-41.57	10029291	03/12/2021
53391	1000	OPP	LC14510	IGNITION LOCK CYLINDER	-19.75	-19.75	10029291	03/12/2021

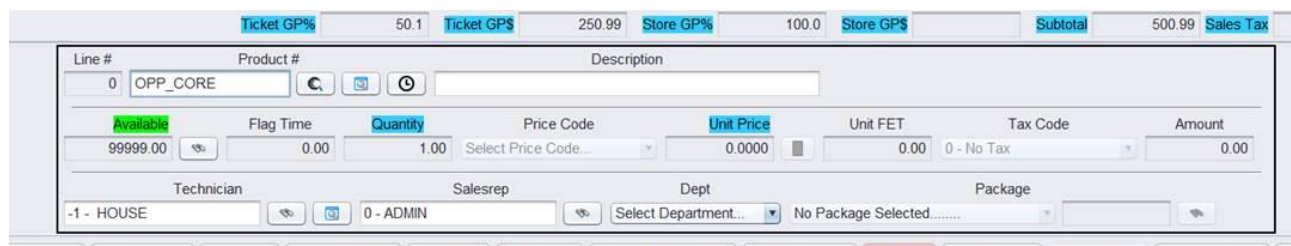
Open	AUTOZONE (363)	In Shop	OPP	LC14510	IGNITION LOCK CYLINDER	08/21/2023 03:04 PM	08/21/2023	-19.75	412566	53390
Open	O'REILLY (362)	In Shop	OPP	611-075	WHEEL LUG NUT	08/14/2023 10:14 AM	08/14/2023	-8.67	412414	53079
Open	O'REILLY (362)	In Shop	OPP	A38002	FUEL PUMP MOTOR	07/31/2023 11:47 AM	07/31/2023	-173.69	412010	52376
Open	AUTOZONE (363)	In Shop	OPP	30295	WHEEL CYLINDER	08/14/2023 10:15 AM	08/14/2023	-43.66	412414	53081
Open	ADVANCE AUTO (364)	In Shop	OPP	YH524448P	REAR DISC BRAKE	08/22/2023 10:20 AM	08/22/2023	-85.00	412589	53403
Open	AUTOZONE (363)	In Shop	OPP	3032	PLATINUM PLUG	08/11/2023 09:35 AM	08/11/2023	-32.45	412349	52828
Open	O'REILLY (362)	In Shop	OPP	33937	FUEL FILTER	07/15/2023 09:34 AM	07/15/2023	-39.63	411619	51548
Open	O'REILLY (362)	In Shop	OPP	MS96252	PLENUM GASKET	08/04/2023 05:27 PM	08/04/2023	-8.84	412207	52572
Open	AUTOZONE (363)	In Shop	OPP	FF696DL	FUEL FILTER	07/27/2023 07:41 AM	07/27/2023	-5.09	411965	52061
Open	O'REILLY (362)	Credit Returned	OPP	BH634047	DEAD BRAKE HOSE	07/27/2023 02:45 PM	07/27/2023	-2.64	411550	51895

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**

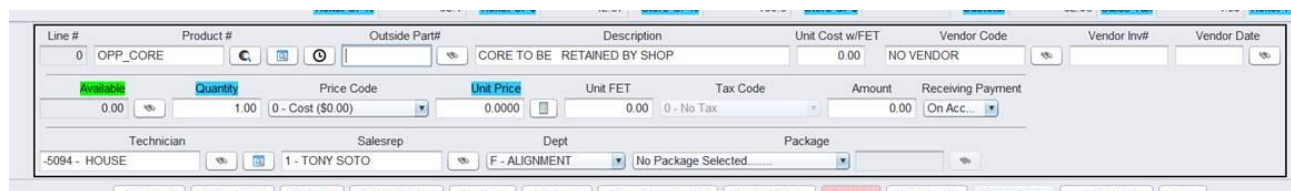
In the Product # type OPP_CORE



The screenshot shows the 'Enter Product' form in the HITS Shop Suite. At the top, there are summary fields: Ticket GP% (50.1), Ticket GP\$ (250.99), Store GP% (100.0), Store GP\$ (500.99), Subtotal (500.99), and Sales Tax. The main form has the following fields:

- Line #: 0
- Product #: OPP_CORE
- Description: (empty)
- Available: (checked)
- Flag Time: 0.00
- Quantity: 1.00
- Price Code: Select Price Code...
- Unit Price: 0.0000
- Unit FET: 0.00
- Tax Code: 0 - No Tax
- Amount: 0.00
- Technician: -1 - HOUSE
- Salesrep: 0 - ADMIN
- Dept: Select Department...
- Package: No Package Selected

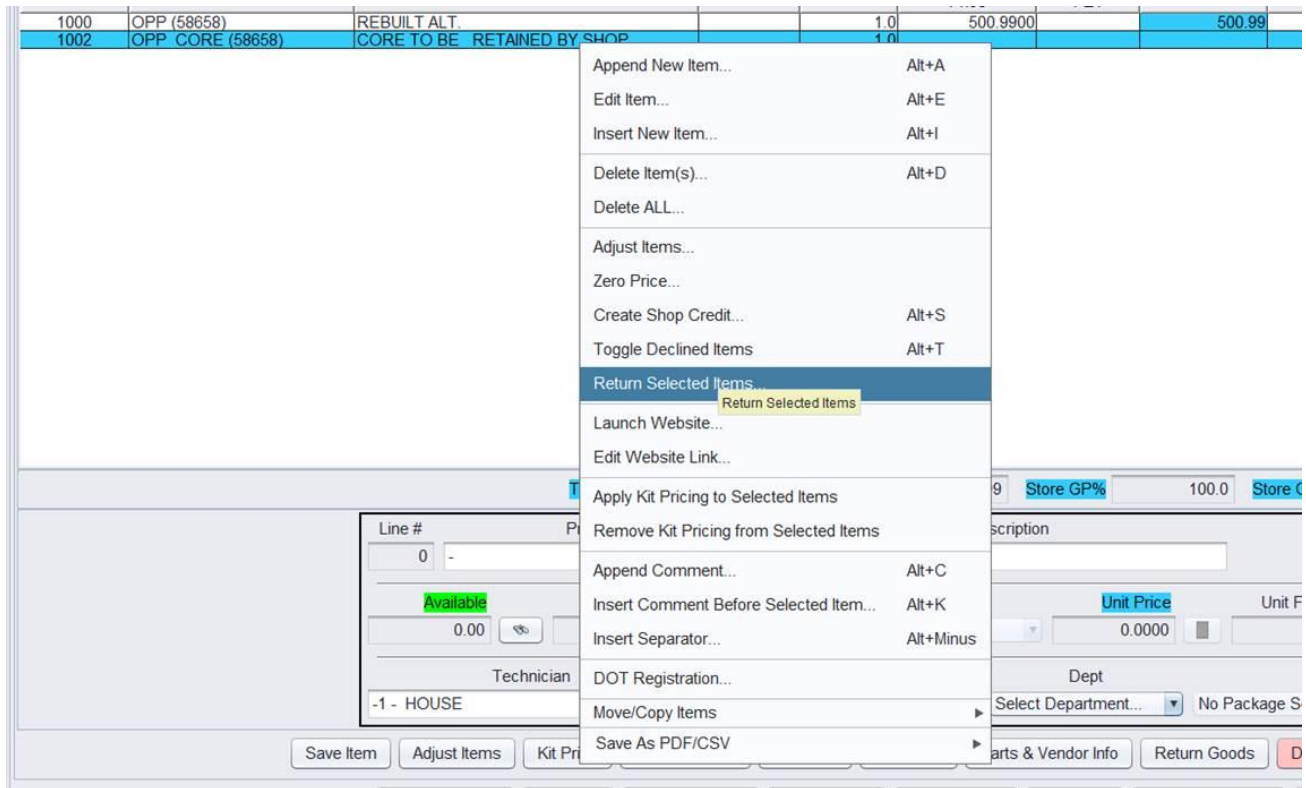
This will give you the core line item box to enter all the information: Fill in the part# and vendor inv# and core cost. Then **save item**.



The screenshot shows the 'Core Line Item' form in the HITS Shop Suite. The form has the following fields:

- Line #: 0
- Product #: OPP_CORE
- Outside Part#: (empty)
- Description: CORE TO BE RETAINED BY SHOP
- Unit Cost w/FET: 0.00
- Vendor Code: NO VENDOR
- Vendor Inv#: (empty)
- Vendor Date: (empty)
- Available: (checked)
- Quantity: 1.00
- Price Code: 0 - Cost (\$0.00)
- Unit Price: 0.0000
- Unit FET: 0.00
- Tax Code: 0 - No Tax
- Amount: 0.00
- Receiving Payment: On Acc...
- Technician: -5094 - HOUSE
- Salesrep: 1 - TONY SOTO
- Dept: F - ALIGNMENT
- Package: No Package Selected

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.

Return Goods Tickets Lookup

Vendor (Blank=ALL)

Return Status ☒ ALL ☐ In Shop ☐ Returned - Awaiting Credit ☐ Credit Received

Ticket Status ☐ All ☒ Open ☐ Closed

Dates From To ☒ Include Carryovers

Store

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

Return Status	Product #	Vendor Part#	Description	Start Date
In Shop	OPP_CORE	58658	CORE TO BE RETAINED BY SHOP	03/19/2025 01:35 PM

Set Return Status ▶
Apply Credits...
View Ticket...
View Detail...
View Linked Receipt Detail...
View Original Invoice Detail...
Save as PDF Ctrl+Shift+P
Save as PDF (Printer-Friendly) Alt+Shift+P
Save as CSV Ctrl+Alt+P

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.

Find Reset Hide Inputs Help

Apply Returned Goods Credits

Ticket #	Item #	Product #	Op Part #	Description	Expected Credit	Actual Credit	Vendor Invoice #	Vendor Date
1290	1000	OPP_CORE	58658	CORE TO BE RETAINED BY SHOP	-75.00	75.00		

Enter Credits & Leave Open Post Credits & Close Cancel Suggest Help

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.

Line #	Product #	Description	Unit Cost w/FET
0	CORE-BATT	CORE CHARGE - BATTERY	1.63

Available Quantity Price Code Unit Price Unit FET Tax Code

0.00 1.00 2 - Price 2 (\$49.68) 18.0000 0.00 1 - Tax Code 1 (

Technician Salesrep Dept

-970 - HOUSE 1 - CAMIE FULFORD A - BATTERIES No Package Selected.

11. Transfers

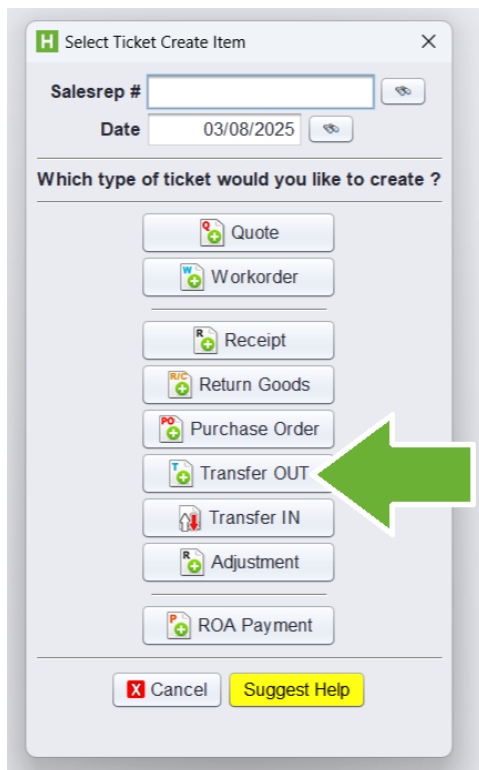
In HITS, stores can transfer inventory to other stores or to/from the warehouse.

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**



Select Ticket Create Item

Salesrep #

Date 03/08/2025

Which type of ticket would you like to create ?

- Quote
- Workorder
- Receipt
- Return Goods
- Purchase Order
- Transfer OUT
- Transfer IN
- Adjustment
- ROA Payment

Cancel Suggest Help

Click on the store product is being sent to:

H Vendor Lookup

Transfer Mode

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.

.....

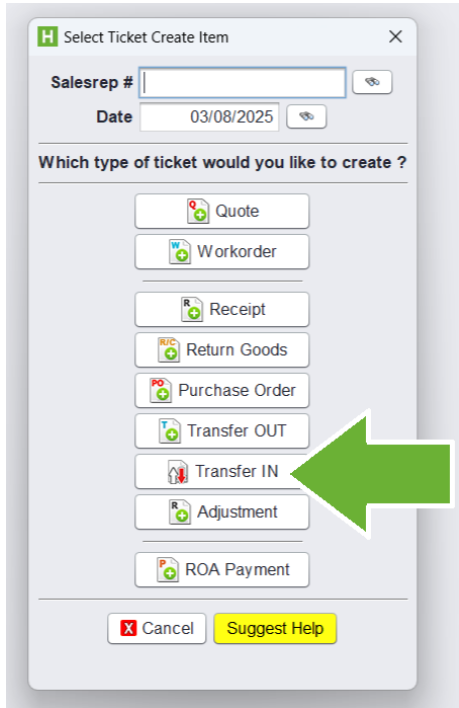
INBOUND Transfer

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.

.....

110

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



Select Ticket Create Item

Salesrep #

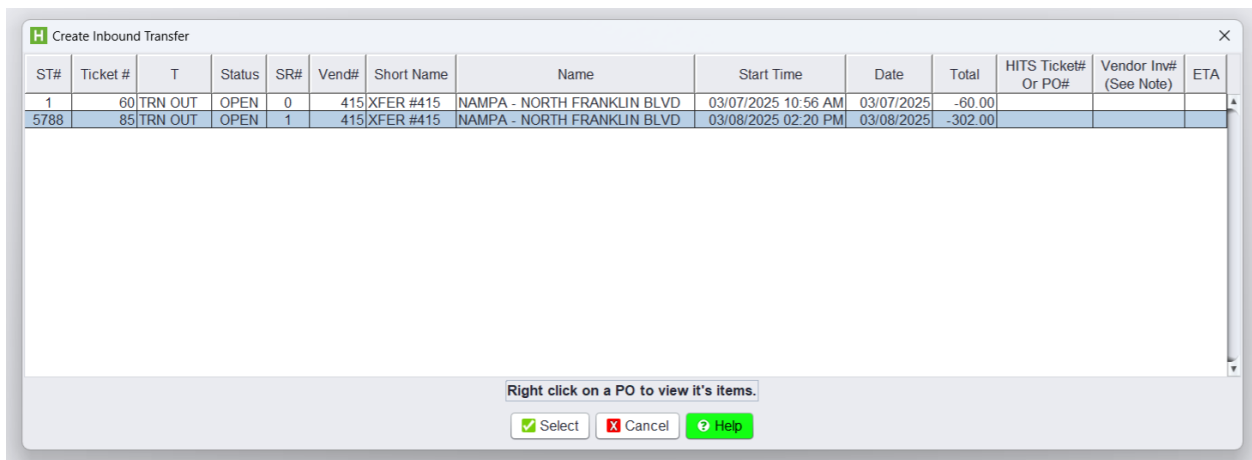
Date 03/08/2025

Which type of ticket would you like to create ?

- Quote
- Workorder
- Receipt
- Return Goods
- Purchase Order
- Transfer OUT
- Transfer IN**
- Adjustment
- ROA Payment

Cancel Suggest Help

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.



Create Inbound Transfer

ST#	Ticket #	T	Status	SR#	Vend#	Short Name	Name	Start Time	Date	Total	HITS Ticket# Or PO#	Vendor Inv# (See Note)	ETA
1	60	TRN OUT	OPEN	0	415	XFER #415	NAMPA - NORTH FRANKLIN BLVD	03/07/2025 10:56 AM	03/07/2025	-60.00			
5788	85	TRN OUT	OPEN	1	415	XFER #415	NAMPA - NORTH FRANKLIN BLVD	03/08/2025 02:20 PM	03/08/2025	-302.00			

Right click on a PO to view it's items.

Select Cancel Help

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

Ticket Detail [X]

Product #	Description	Size	Qty	Unit Cost w/FET	Unit FET	Amount	Reference Cost
160070	225/60R16 TOYO ECLIPSE	225/60R16	-4.0	75.5000		-302.00	75.50

Qty: -4 Cost: 0.00 Weight: 0.00 Cubic Size: 0.00 Trailer FT: 0.00
 Merchandise: -302.00 FET: 0.00 Services: 0.00 Sales Tax: 0.00 Total: -302.00

☒ This matches what was received
 ☐ This does NOT match 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.

Info [X]

Please contact Store #1 to resolve discrepancies on Transfer #60.

After the OUTBOUND transfer has been corrected, return to this screen to receive the INBOUND transfer.

This will as a notification in the other store.

H Process Hits Notifications

Status: Date Range: From To

Receive Time	ID	HID	Ticket #	Type	Name	Vehicle	Phone	Email
03/07/2025 11:25 AM	1	104		Transfer Request	Store 415 - Gills Point S - Nampa - North Franklin Blvd		208-461-8473	

24665024 - 1 Requested

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

H View Alert

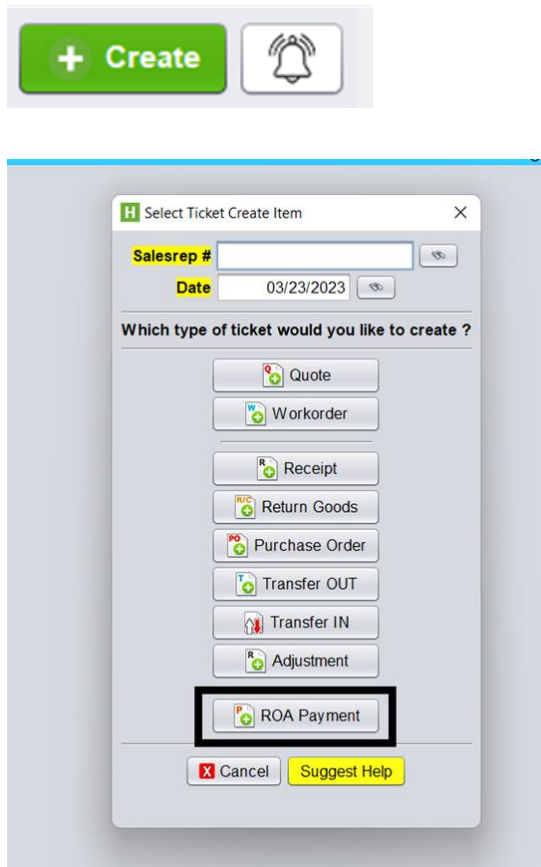
24665024 - 1 Requested



☒ OK

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



+ Create 

Select Ticket Create Item X

Salesrep # 

Date 03/23/2023 

Which type of ticket would you like to create ?

 Quote

 Workorder

 Receipt

 Return Goods

 Purchase Order

 Transfer OUT

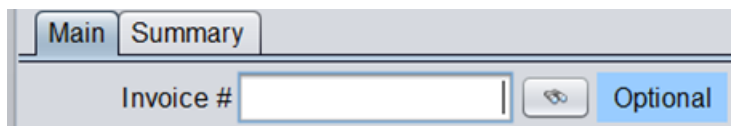
 Transfer IN

 Adjustment

 **ROA Payment**

 Cancel  Suggest Help

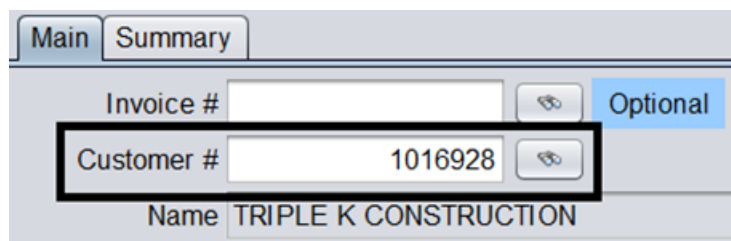
If applying payment to a single specific invoice, you can enter the **Invoice#** the customer is paying. This will pull up the customer and amount due. If posting payments for statement or multiple invoice, leave this field blank.



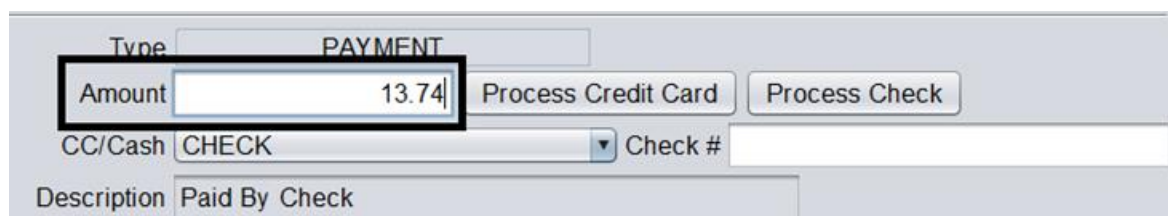
Main **Summary**

Invoice #  **Optional**

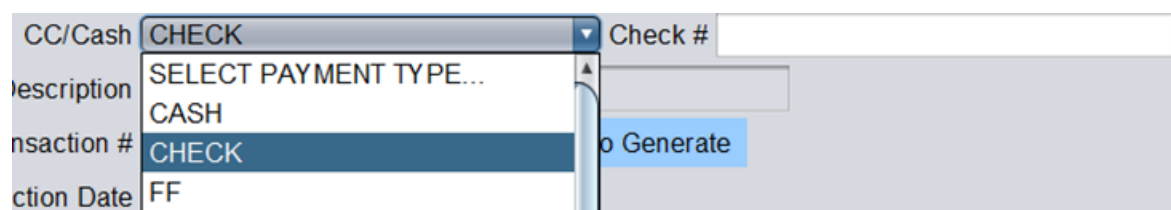
To look up the customer for payment, either type in the customer's account# or perform a customer lookup.



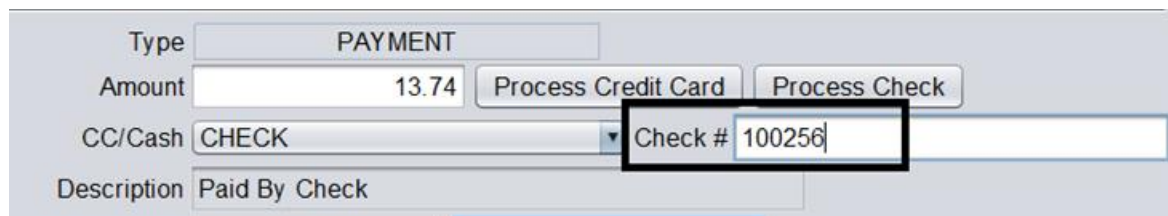
Next type in the **Amount** for payment and hit ENTER:



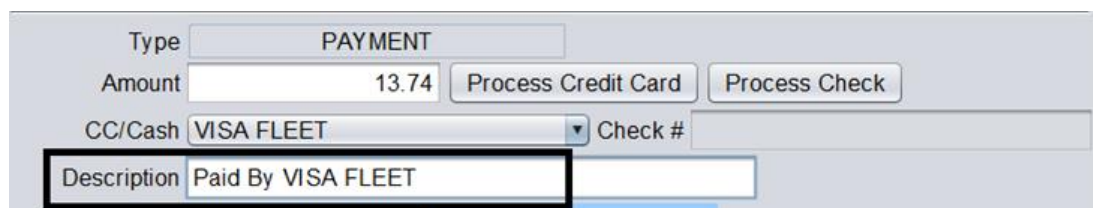
Select the payment method from the dropdown:



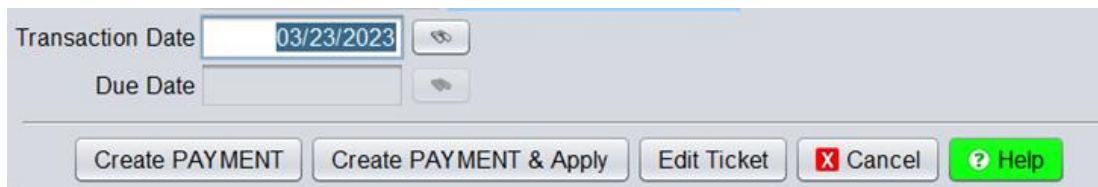
If the customer is paying with CHECK, a CHECK# can be added:



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:



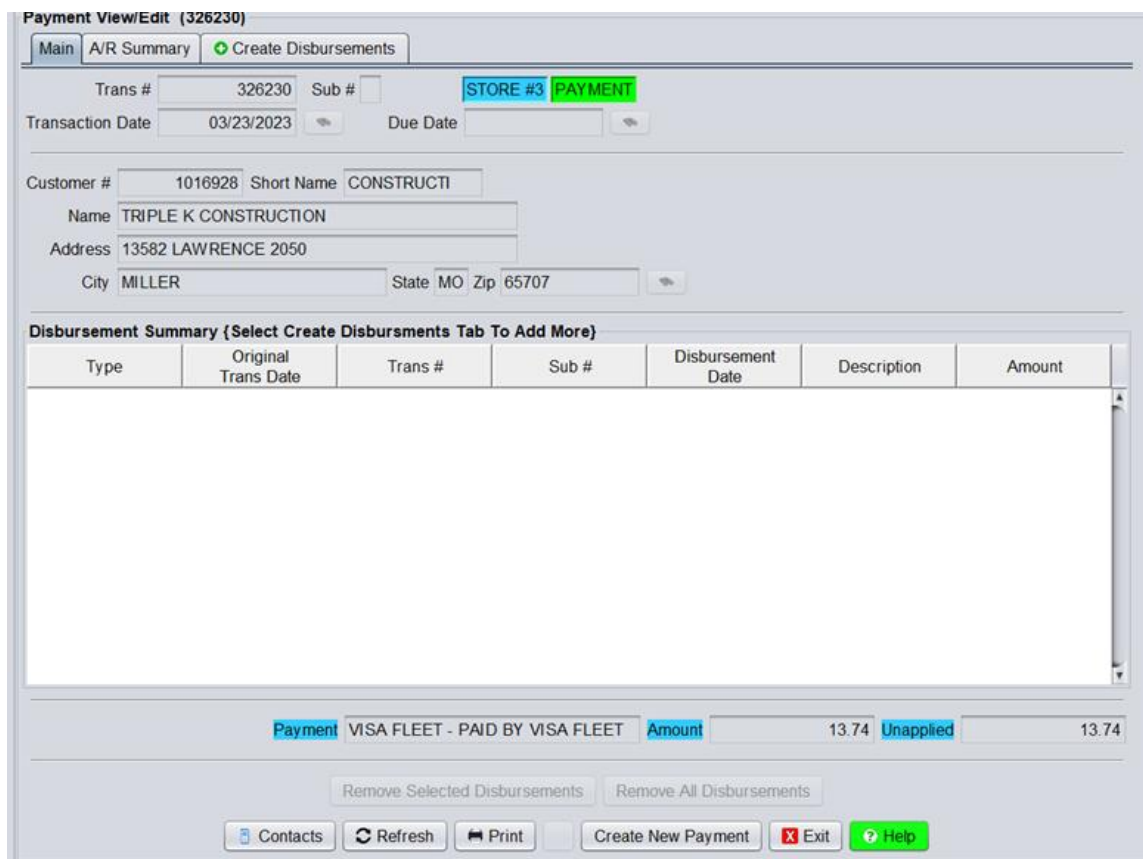
Transaction Date 

Due Date 

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.



Payment View/Edit (326230)

Trans # Sub # STORE #3 PAYMENT

Transaction Date  Due Date 

Customer # Short Name

Name

Address

City State Zip 

Disbursement Summary (Select Create Disbursements Tab To Add More)

Type	Original Trans Date	Trans #	Sub #	Disbursement Date	Description	Amount

Payment VISA FLEET - PAID BY VISA FLEET
Amount
Unapplied

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

Payment View/Edit (326230)

Main A/R Summary **+ Create Disbursements**

Trans # 326230 Sub # STORE #3 PAYMENT

Transaction Date 03/23/2023 Due Date

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)

Payment View/Edit (326230)

Main A/R Summary **+ Create Disbursements**

Disbursements are NOT saved until you press the <Commit Disbursements> button. Saved disbursements will only display on the Main Tab.

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.

1.00	1.00	
1.00	1.00	
1.00	1.00	
1.00	1.00	
1.00	1.00	
1.00	1.00	

Add Items...
 Disburse to Selected Items
 Auto Apply To Disbursements
Apply Specific Amount...

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.

Payment View/Edit (326230)

Main A/R Summary **Create Disbursements**

Disbursements are NOT saved until you press the <Commit Disbursements> button. Saved disbursements will only display on the Main Tab.

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	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	

☒ Limit Disbursements To Amount Available To Disburse

Amount Available To Disburse

Right-click the table for available options. Double-click on a single item to pay or clear that item.

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

Right-click the table for available options. Double-click on a single item to pay or clear that item.

Fetch Fetch & Apply Fetch All CREDITS Fetch All **Commit Disbursements**

Contacts Refresh Print Create New Payment Exit Help

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**.

Disbursement	Original Date	Trans #	Split Seq	Disbursement Date	Description	Amount
Disbursement	09/30/2021	-7399147		03/23/2023	FIN. CHG.	1.00
Disbursement	12/31/2021	-7399342		03/23/2023	FIN. CHG.	1.00

Payment **VISA FLEET - PAID BY VISA FLEET** Amount **13.74** Unapplied **0.00**

Remove Selected Disbursements Remove All Disbursements

Contacts Refresh Print Create New Payment Exit Help

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.

LOGIN: DAX CHANDLER VIEW: BOOKKEEPING STORE NAME: GILLS POINT S - ALBUQUERQUE - EUBANK BLVD NE
 CUSTOMER: DAX & CINDY CHANDLER [1208272] VEHICLE: STORE: 986

Payment View/Edit (127646)

Main A/R Summary Create Disbursements

Trans # 127646 Sub # STORE #5119 PAYMENT
 Transaction Date 09/24/2025 Due Date

Customer # 1208272 Short Name DAX & CIND
 Name DAX & CINDY CHANDLER
 Address 1439 NAPLES STREET
 City BILLINGS State MT Zip 59105

Disbursement Summary (Select Create Disbursements Tab To Add More)

Type	Original Trans Date	Trans #	Split Seq	Disbursement Date	Description	Amount
------	---------------------	---------	-----------	-------------------	-------------	--------

Print ROA Ticket X
 Print Method ☒ Print ☐ View PDF ☐ Email PDF ☐ Dot Matrix
 Num Copies 1
 OK Cancel Suggest Help

Payment CA - PAID BY CHECK Amount 777.00 Unapplied 777.00

Remove Selected Disbursements Remove All Disbursements

Contacts Refresh Print Create New PAYMENT Return To ROA Tickets Lookup Help

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					

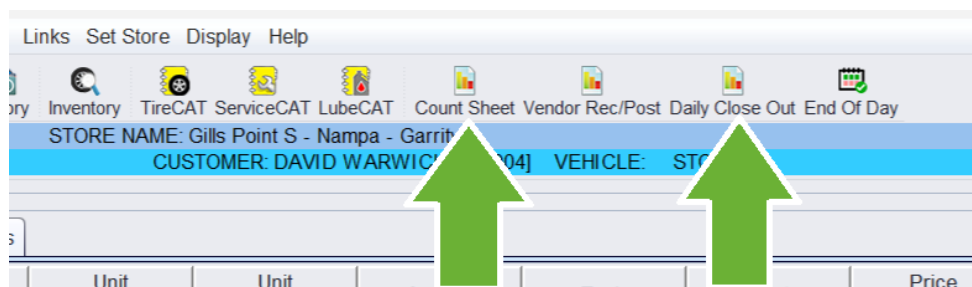
GILLS POINT S - ALBUQUERQUE - EUBANK BLVD NE 241 Eubank Blvd NE ALBUQUERQUE, NM 87123 505-265-6405					
DAX & CINDY CHANDLER 1439 NAPLES STREET BILLINGS, MT 59105					ACCOUNT#: 1208272 DATE : 09/24/25 : 127646
Ph: (406)460-0464					
Transaction#	Sub#	Trans.Date	Description	Disbursement Date	Trans.Amount

Check #/Description	Cash/CC Code	Transaction Amount
Paid By Check	CA	777.00
Future Due*	Current Due*	Past 1-30*
-777.00	0.00	0.00
		Past 31-60*
		0.00
		Past 61-90*
		0.00
		Past 90+*
		0.00
		AcctBalance*
		-777.00

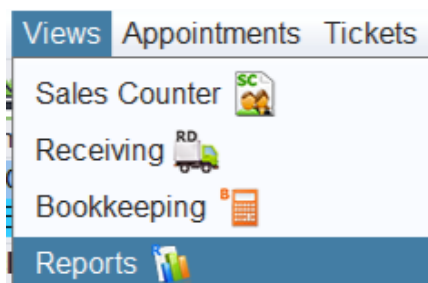
*Aging & Account Balance Is As Of: 09/24/2025

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.

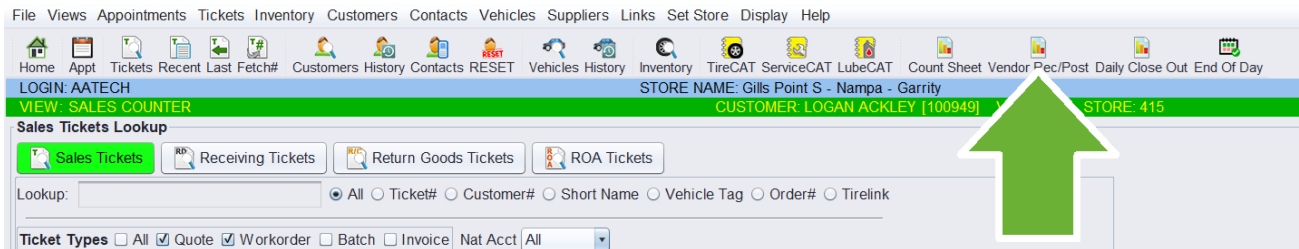
c. Verify the Customer Work Orders are Closed

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

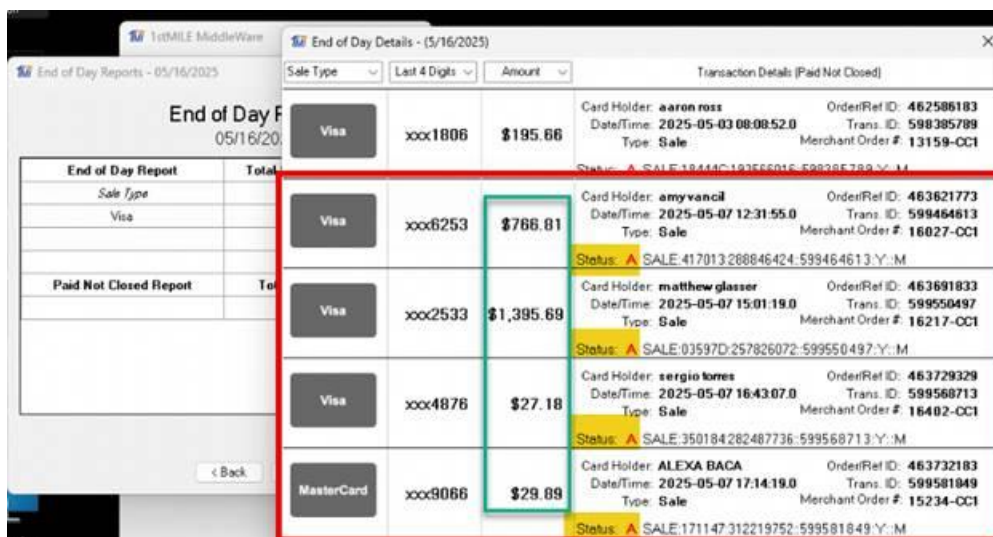
Here's an explanation of what "paid" but not "closed" might mean and how to address it:

- **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 screenshot shows the 'End of Day Details - (5/16/2025)' window. On the left is a summary table, and on the right is a detailed list of transactions. A red box highlights a subset of transactions, and a green box highlights the amount column within that subset.

End of Day Report		Total
Sale Type		
Visa		
Paid Not Closed Report		

Sale Type	Last 4 Digits	Amount	Transaction Details (Paid Not Closed)
Visa	xxx1806	\$195.86	Card Holder: aaron ross Date/Time: 2025-05-03 08:08:52.0 Type: Sale OrderRef ID: 462586183 Trans. ID: 598385789 Merchant Order #: 13159-CC1 Status: A SALE 18444C193F6601E-598385789-Y:M
Visa	xxx6253	\$766.81	Card Holder: amy vancil Date/Time: 2025-05-07 12:31:55.0 Type: Sale OrderRef ID: 463621773 Trans. ID: 599464613 Merchant Order #: 16027-CC1 Status: A SALE 417013268846424-599464613-Y:M
Visa	xxx2533	\$1,395.69	Card Holder: matthew glasser Date/Time: 2025-05-07 15:01:19.0 Type: Sale OrderRef ID: 463691833 Trans. ID: 599550497 Merchant Order #: 16217-CC1 Status: A SALE 03597D257826072-599550497-Y:M
Visa	xxx4876	\$27.18	Card Holder: sergio torres Date/Time: 2025-05-07 16:43:07.0 Type: Sale OrderRef ID: 463729329 Trans. ID: 599568713 Merchant Order #: 16402-CC1 Status: A SALE 350184262487736-599568713-Y:M
MasterCard	xxx9066	\$29.89	Card Holder: ALEXA BACA Date/Time: 2025-05-07 17:14:19.0 Type: Sale OrderRef ID: 463732183 Trans. ID: 599581049 Merchant Order #: 15234-CC1 Status: A SALE 171147312219752-599581049-Y:M

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.

Transaction Result - (5/7/2025)			Transaction Details
	Last 4 Digits	Amount	
Visa	xxx6253	\$766.81	Card Holder: Amy Vancil Order/Ref ID: 463621773 Date/Time: May 07 2025/12:31PM Trans. ID: 599464613 Type: Sale Merchant Order #: 16027-CC1 Status: Approved - SALE:417013:288846424:599464613:Y::M
Visa	xxx2533	\$1395.69	Card Holder: Matthew Glasser Order/Ref ID: 463691833 Date/Time: May 07 2025/03:01PM Trans. ID: 599550497 Type: Sale Merchant Order #: 16217-CC1 Status: Approved - SALE:03597D:257826072:599550497:Y::M
CFNA	xxx7797	\$705.98	Card Holder: Victor F Munoz Order/Ref ID: 463706891 Date/Time: May 07 2025/04:03PM Trans. ID: 599570795 Type: Sale Merchant Order #: 16341-CC1 Status: Approved - SALE:9607:25050767483712:18:599570795:Y::M
Visa	xxx4876	\$27.18	Card Holder: Sergio Torres Order/Ref ID: 463729329 Date/Time: May 07 2025/04:43PM Trans. ID: 599568713 Type: Sale Merchant Order #: 16402-CC1 Status: Approved - SALE:350184:282487736:599568713:Y::M
MasterCard	xxx9066	\$29.89	Card Holder: Alexa Baca Order/Ref ID: 463732183 Date/Time: May 07 2025/05:14PM Trans. ID: 599581849 Type: Sale Merchant Order #: 15234-CC1 Status: Approved - SALE:171147:312219752:599581849:Y::M

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.

End of Day Reports - 05/16/2025		
End of Day Reports 05/16/2025		
End of Day Report	Total Sales: \$940.83	
Sale Type	Totals	
Visa	\$940.83	Details
Paid Not Closed Report	Total: \$2,415.23	Details

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

End Of Day Deposit and Store Close

Select Store: 5148 - GILLS POINT S - LONGMONT - S. MAIN ST

Date: 05/16/2025

May 2025 Display: ☒ Total Deposit ☐ Over/Short ☐ Day Open ☐ Day Closed

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
4 \$0.00	5 \$0.00	6 \$89.95	7 \$2825.55	8 \$1894.55	9 \$1770.40	10 \$4611.85
11	12 \$2103.33	13 \$2342.88	14 \$1002.53	15 \$680.27	16 \$940.83	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

Starting Drawer: 200.00

Total Cash: 0.00

Total Check: 0.00

Total Cards: 940.83

Total A/R Charge: 0.00

Total Sales: 940.83

Total ROA: 0.00

Total Deposit*: 940.83

Ending Drawer: 200.00

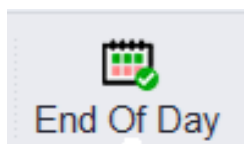
Over/Short: 0.00

End Of Day Comments (optional):

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.

End Of Day Deposit and Store Close

Select Store: **47 - ODESSA**

Date: **03/12/2025**

March 2025 Display: ☒ Total Deposit ☐ Over/Short ☐ Day Open ☒ Day Closed

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
						1 \$5065.68
2	3 \$4985.32	4 \$2197.18	5 \$8648.30	6 \$2658.60	7 \$14113.42	8 \$7389.26
9	10 \$7512.33	11 \$5231.31	12 \$0.00	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

Starting Drawer: 100.00

Total Cash: 0.00

Total Check: 0.00

Total Cards: 1067.40

Total A/R Charge: 0.00

Total Sales: 1067.40

Total ROA: 0.00

Total Deposit*: 0.00

Ending Drawer: 100.00

Over/Short: -1067.40

End Of Day Comments (optional):

*Deposit Includes: ☒ Cash ☒ Check ☒ Cards ☐ A/R

Post Deposit Post Deposit & Close Day Cancel Suggest Help

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

Total Deposit*: 1067.40

Ending Drawer: 100.00

Over/Short: 0.00

*Deposit Includes: ☒ Cash ☒ Check ☒ Cards ☐ A/R

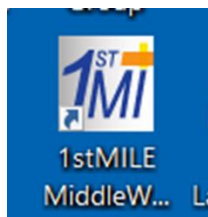
Post Deposit

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

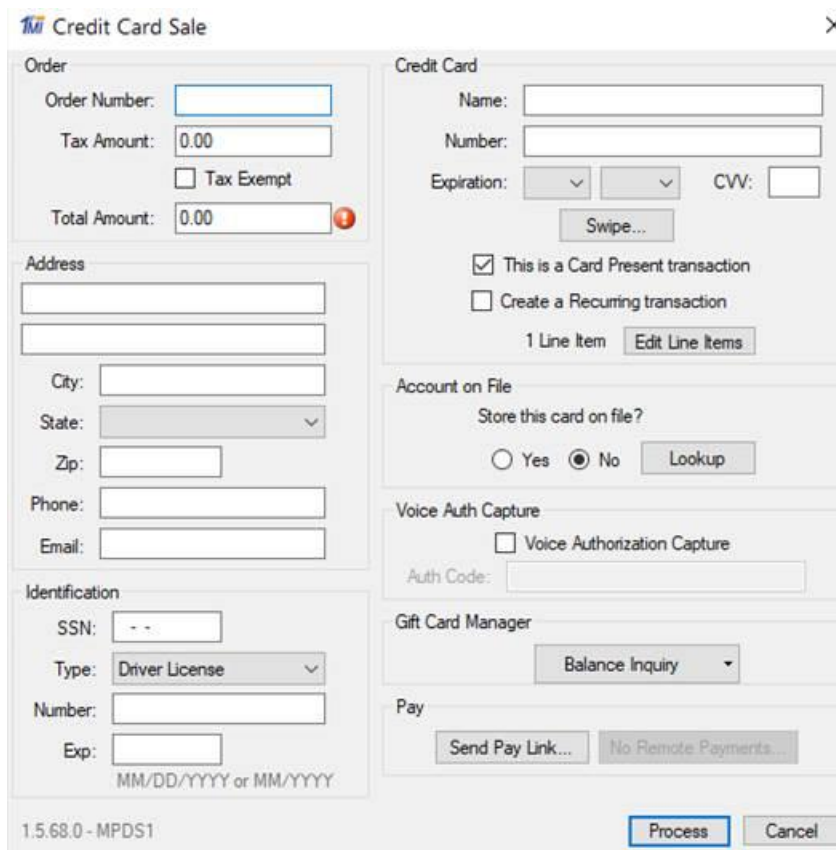
5. Insert the cash, checks, and deposit slips into the secure Night Drop deposit envelope.

f. First Mile Close Process

Open First Mile Icon on the Desktop



This screen will pop up – Hit Cancel –

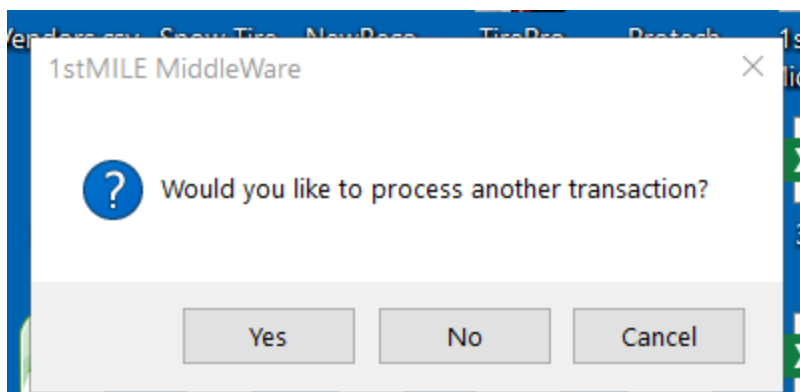


The screenshot shows the "1stMILE Credit Card Sale" window. It contains several sections for data entry:

- Order:** Order Number, Tax Amount (0.00), Tax Exempt checkbox, Total Amount (0.00).
- Address:** Address line, City, State (dropdown), Zip, Phone, Email.
- Identification:** SSN, Type (Driver License dropdown), Number, Exp (MM/DD/YYYY or MM/YYYY).
- Credit Card:** Name, Number, Expiration (dropdowns), CVV, Swipe... button, checkboxes for "This is a Card Present transaction" (checked) and "Create a Recurring transaction", "1 Line Item" and "Edit Line Items" buttons.
- Account on File:** "Store this card on file?" with Yes/No radio buttons and a "Lookup" button.
- Voice Auth Capture:** "Voice Authorization Capture" checkbox and "Auth Code" field.
- Gift Card Manager:** "Balance Inquiry" dropdown.
- Pay:** "Send Pay Link..." and "No Remote Payments..." buttons.

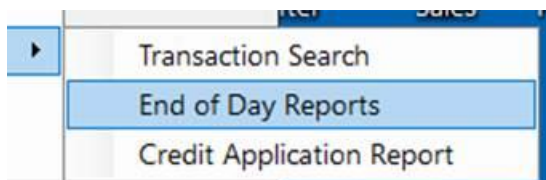
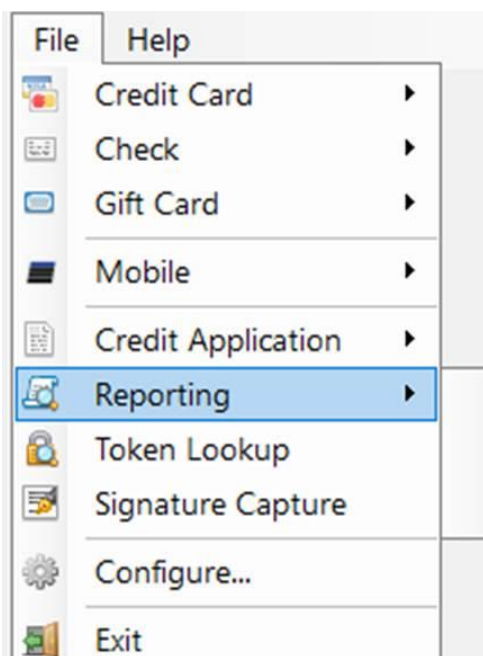
At the bottom, there is a version number "1.5.68.0 - MPDS1" and "Process" and "Cancel" buttons.

This screen will pop up – Hit Cancel

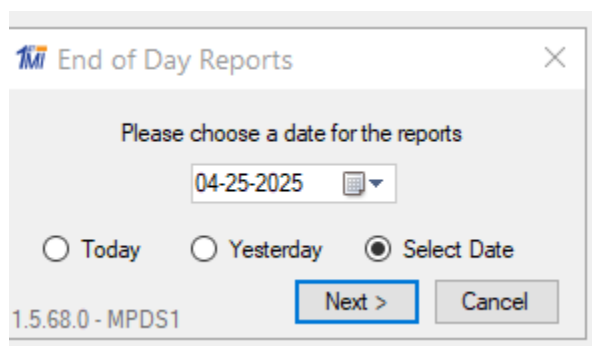


Go to >File > Reporting > End of day Reports

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



Select your Date



End of Day Reports

Please choose a date for the reports

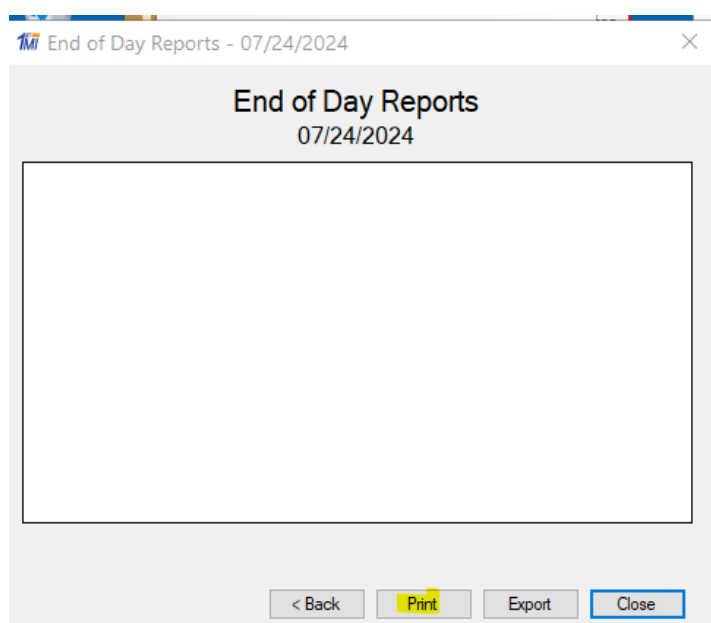
04-25-2025

☐ Today ☐ Yesterday ☒ Select Date

Next > Cancel

1.5.68.0 - MPDS1

This will generate the report, and you can print it



End of Day Reports - 07/24/2024

End of Day Reports
07/24/2024

< Back Print Export Close

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

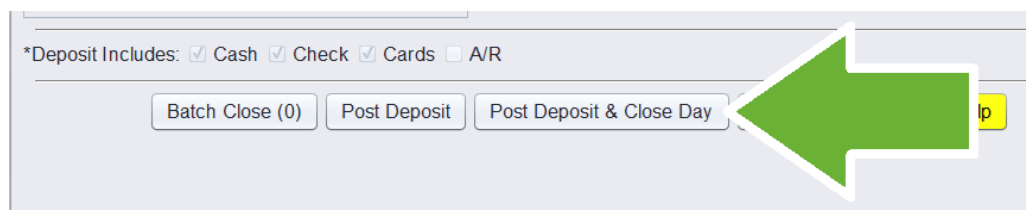
This step is necessary to sync inventory data between HITS and RM Warehouse Management

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.

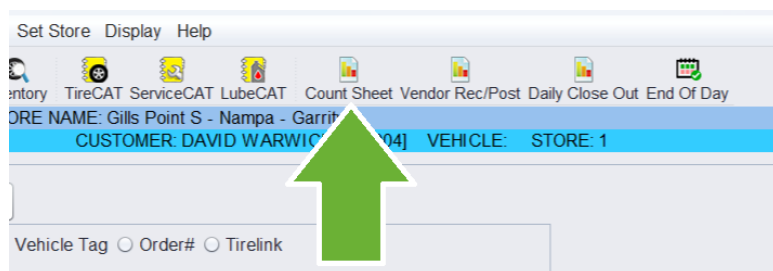
If you are going to the bank and using the bank Night Drop, then some best practices for doing so are:

- 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)
JE's 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**.

Select Ticket Create Item

Salesrep #

Date 03/08/2025

Which type of ticket would you like to create ?

Quote

Workorder

Receipt

Return Goods

Purchase Order

Transfer OUT

Transfer IN

Adjustment

ROA Payment

Cancel Suggest Help

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.

Line #	Product #	Description
0	160060	215/60R16 TOYO ECLIPSE
Available	Adjust Qty (+/-)	Unit FET
0.00	-4.00	0.00

Salesrep Dept

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.

Line #	Product #	Description
0	1021496	215/60R16 HANKOOK KINERGY ST H735
Available	Adjust Qty (+/-)	Unit FET
0.00	4.00	0.00

Salesrep Dept

Enter all products that need adjusting onto the adjustment ticket.

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

16. Miscellaneous

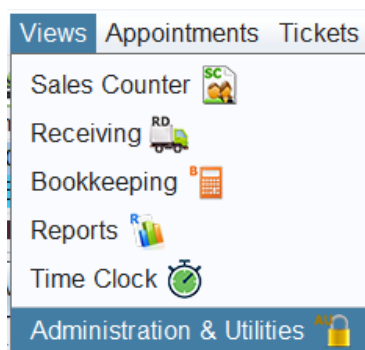
The following topics are miscellaneous how-tos.

a. Download Invoice Graphics

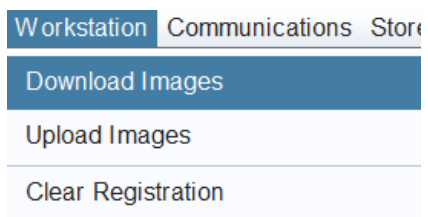
The logos and graphics that print on printed Quotes and Invoices will need to be downloaded to each workstation that prints.

To download images, go to:

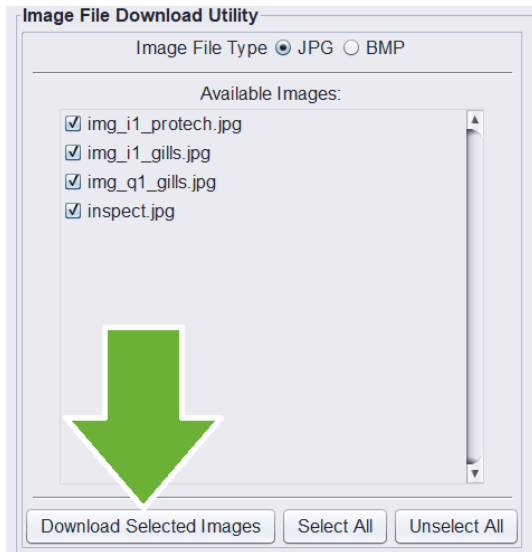
Views > Administration & Utilities



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

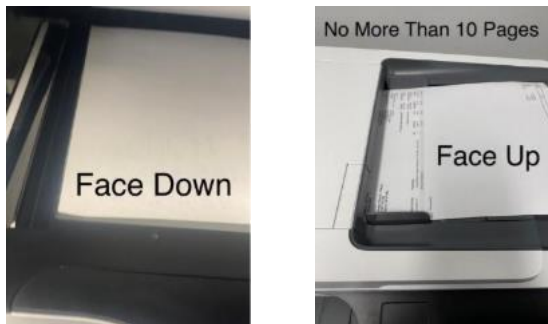
Gills Invoices – Single Page Invoices

- 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

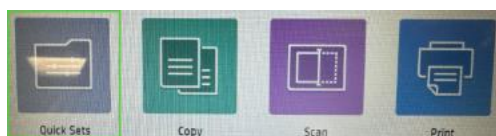
Gills Multi-Page Documents – **NO LONGER EXISTS.** Run all invoice pages through the Invoices quick set.

SCAN DOCUMENTS:

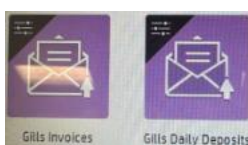
1. On HP E52645, place the document face-down on the scanner glass, or put it face-up in the document feeder and adjust the paper guides to fit the document size.



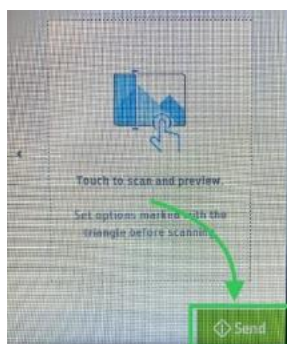
2. From the Home Screen on the printer control panel, select the Quick Sets icon.



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.

Line #	Product #	Description	Unit Cost w/FET
0	TIRESTORAGE	TIRE STORAGE - PER SET	0.00
Available Flag Time Quantity Price Code Unit Price Unit FET Tax Code Amount			
	0.00	0.00	1.00
		4 - Price 4 (\$0.00)	60.00
			0.00
		0 - No Tax	0.00
Technician Salesrep Dept Package			
	-172 - HOUSE	0 - UNKNOWN SALESREP	7 - TIRE LABOR
			No Package Selected

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.

Ticket View/Edit (115469)

Main	+ Line Items	Appointments/Status	Links	Customer Info	Vehicle Info	Paym
------	--------------	---------------------	-------	---------------	--------------	------

Ticket #	115469	Copy #		Date	08/19/2025	Salesrep
Cust #	106489			Short Name	9990	

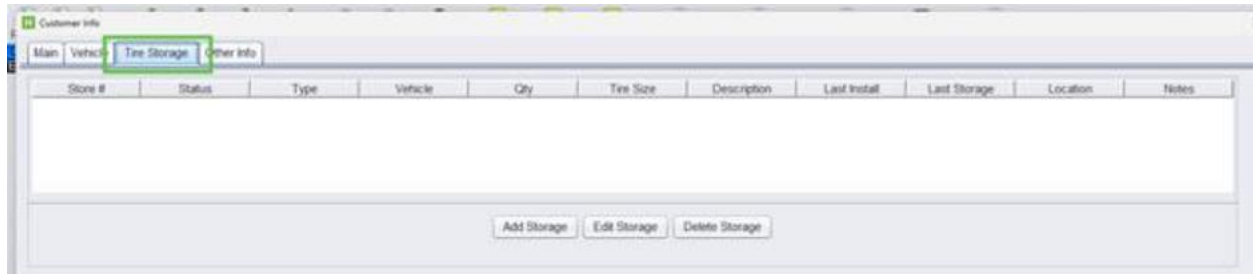
Name SERVICE TRUCKS - OVERHEAD 9990

Address 1425 W 2ND STREET Ship To/Bill To X

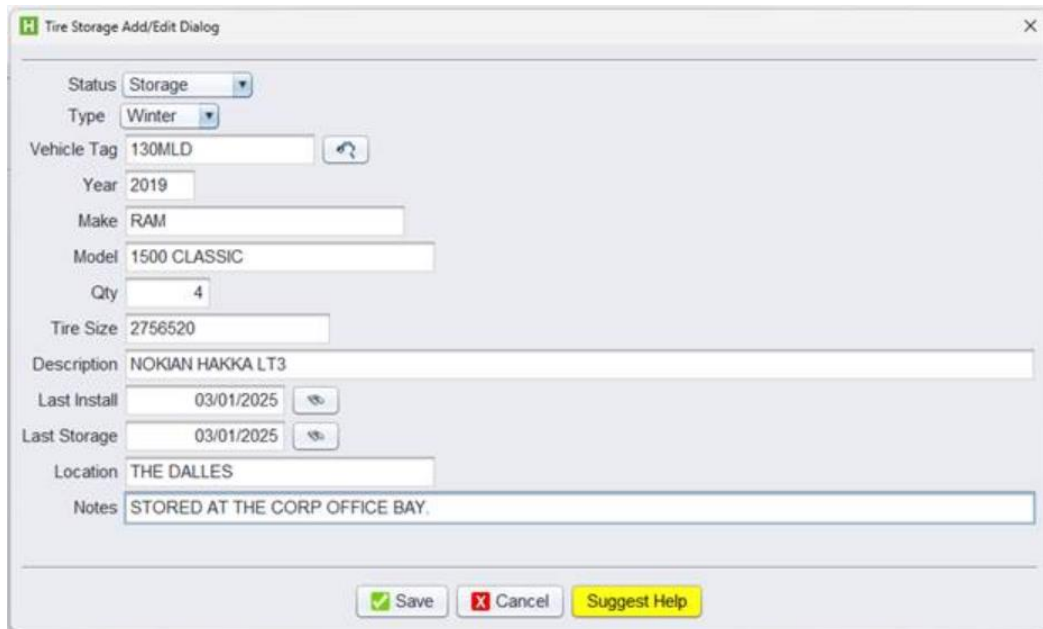
City THE DALLES St OR Zip 97058

Tec# 120MID Year 2010 Make RAM

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.

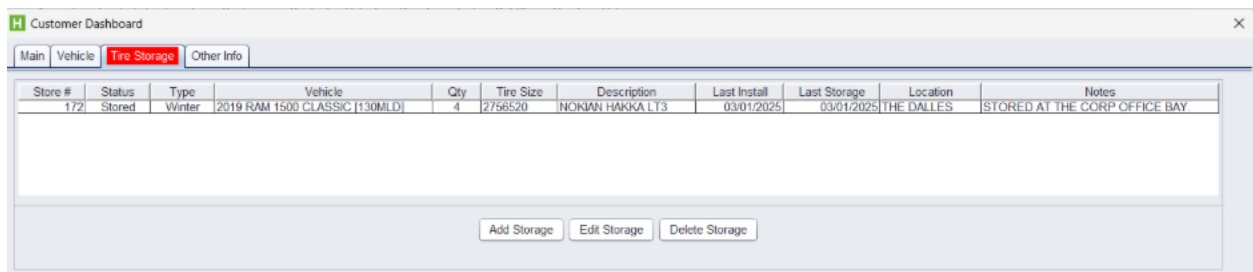


The dialog box contains the following fields and values:

- Status: Storage
- Type: Winter
- Vehicle Tag: 130MLD
- Year: 2019
- Make: RAM
- Model: 1500 CLASSIC
- Qty: 4
- Tire Size: 2756520
- Description: NOKIAN HAKKA LT3
- Last Install: 03/01/2025
- Last Storage: 03/01/2025
- Location: THE DALLES
- Notes: STORED AT THE CORP OFFICE BAY.

Buttons at the bottom: Save, Cancel, Suggest Help.

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



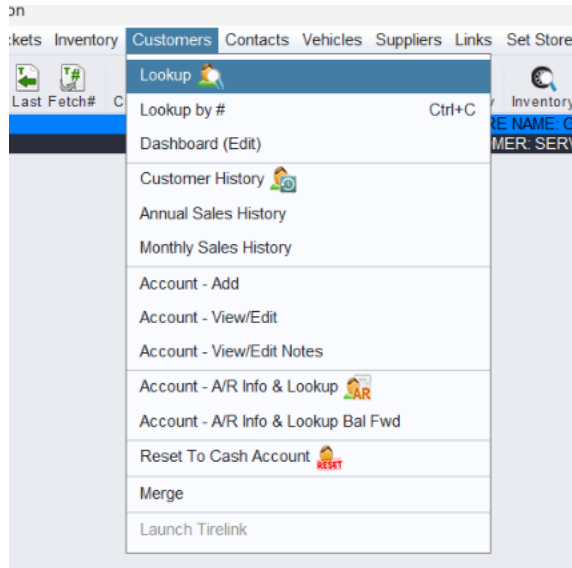
The screenshot shows the 'Customer Dashboard' with the 'Tire Storage' tab selected. The table below contains one record:

Store #	Status	Type	Vehicle	Qty	Tire Size	Description	Last Install	Last Storage	Location	Notes
172	Stored	Winter	2019 RAM 1500 CLASSIC [130MLD]	4	2756520	NOKIAN HAKKA LT3	03/01/2025	03/01/2025	THE DALLES	STORED AT THE CORP OFFICE BAY.

Buttons at the bottom: Add Storage, Edit Storage, Delete Storage.

Adding Tire Storage by Accessing the Customer Dashboard:

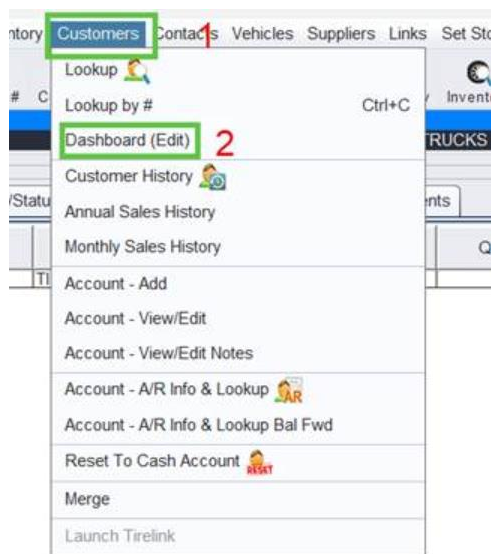
If you have closed the Ticket and need to access the Customer Dashboard at a later time, click on Customers, then look up.



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.