Maintenance Module Guide

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Account Groups

Account groups are a way to organize your accounts

1) Click Add Group

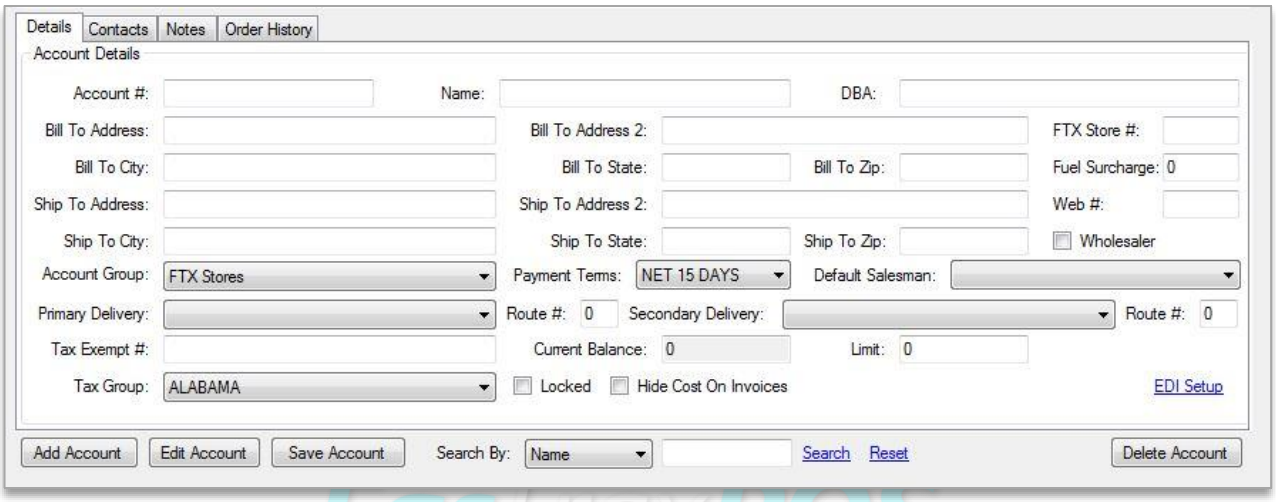
2) Enter the group name
3) Select the appropriate price list from the drop down menu
4) Click Save Group

Accounts

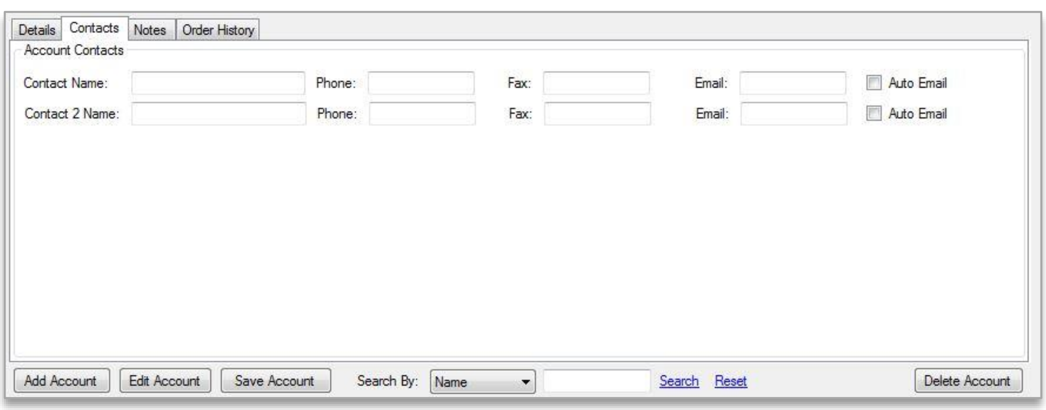
Before Setting up an account make sure to have set up your Account Groups, Payment Terms, Tax Groups and Sales Reps.

1) Click Add Account

2) Enter the Account Details

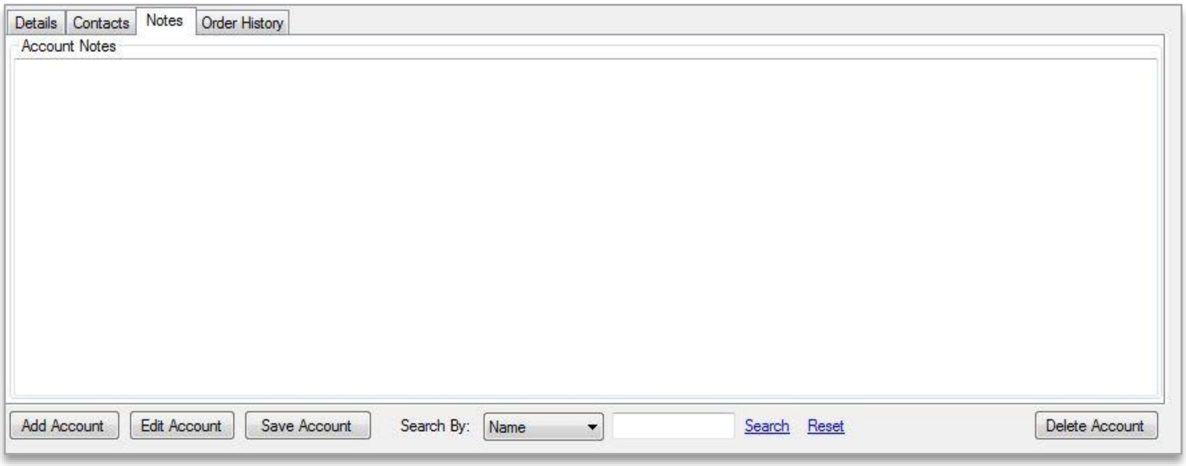


3) After all the details are entered click on the Contacts tab

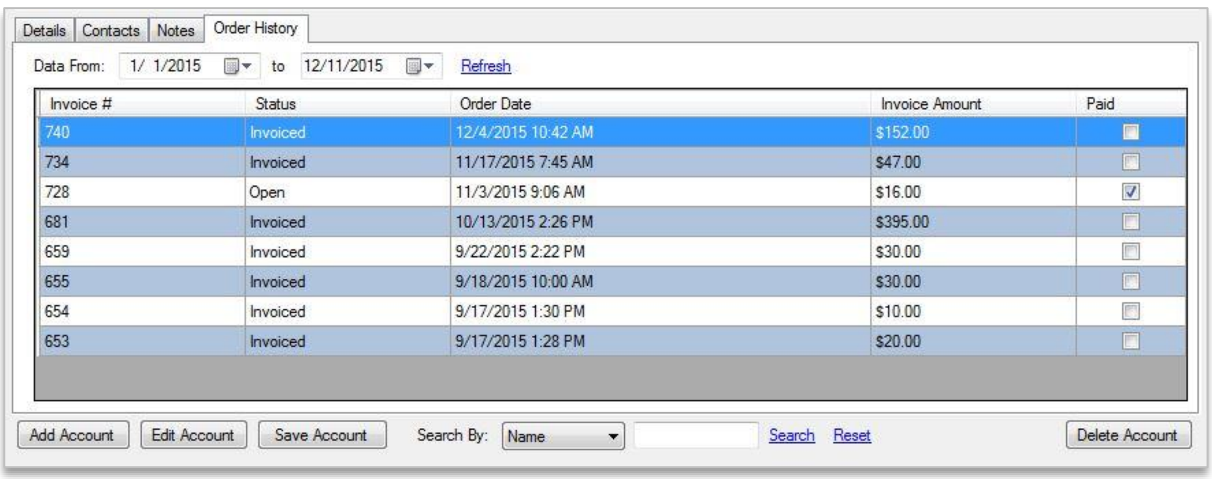


4) Enter the contact information for this account

5) The Notes tab allows you to enter notes for this specific account



6) The order History tab will allow you to see previous invoices for this account



Product Lines

Product Lines are like departments. They are categories for your products

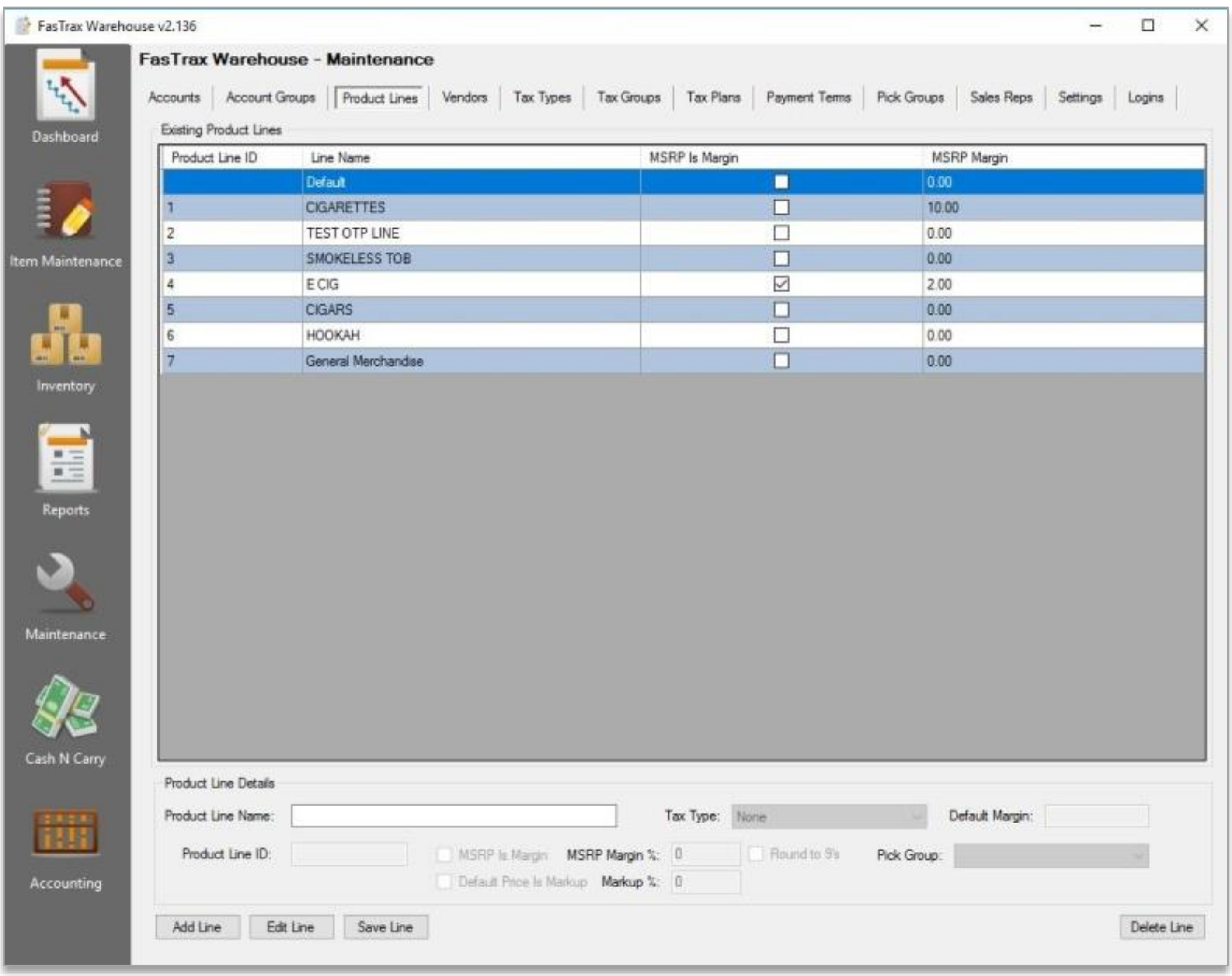
1) Click "Add Line"

2) Enter the name of the product line.

3) Select the tax type

4) Enter the Default margin for the product line.

5) Click on "Save Line"



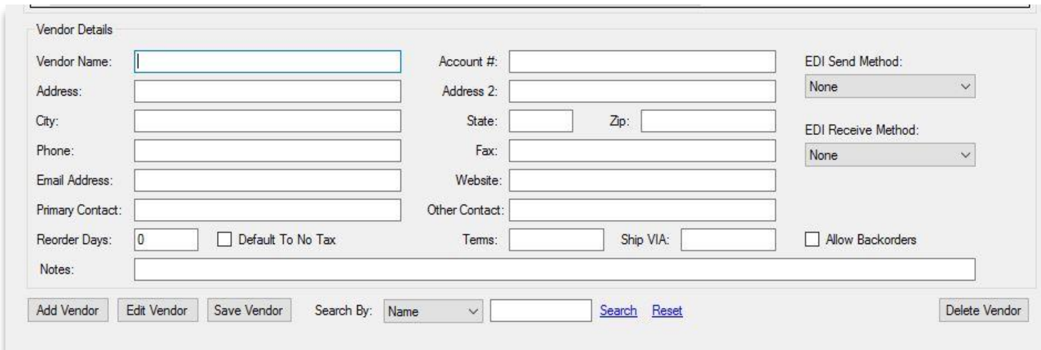
Vendors

To add new vendors

1) Click "Add Vendor"

2) Enter all applicable information (vendor name, address, primary contact, ect...)

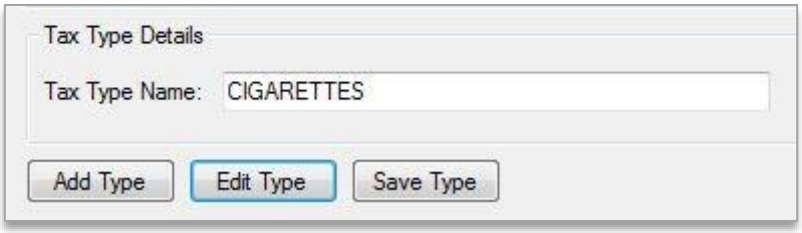
3) Click "Save Vendor" once finished with step 2



Tax Types

1) Click Add Type

2) Enter the name for the tax type



3) Click Save Type

Tax types are your different taxes: cigarettes, cigars, OTP, ect.

Tax Groups

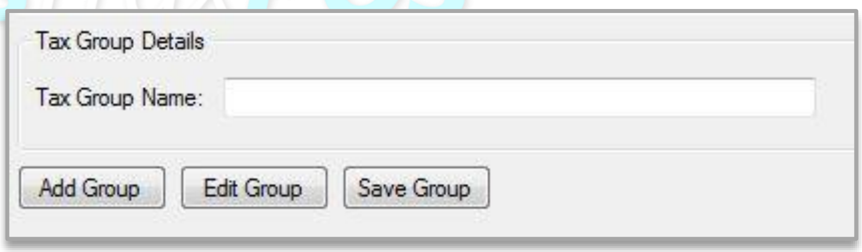
Tax groups can be areas where tax will be different. For example if you sale to two different states, you would create a tax group for both states

1) Click Add Group

2) Name the Tax Group

3) Click Save Group

4) Continue until you have all your tax groups created.



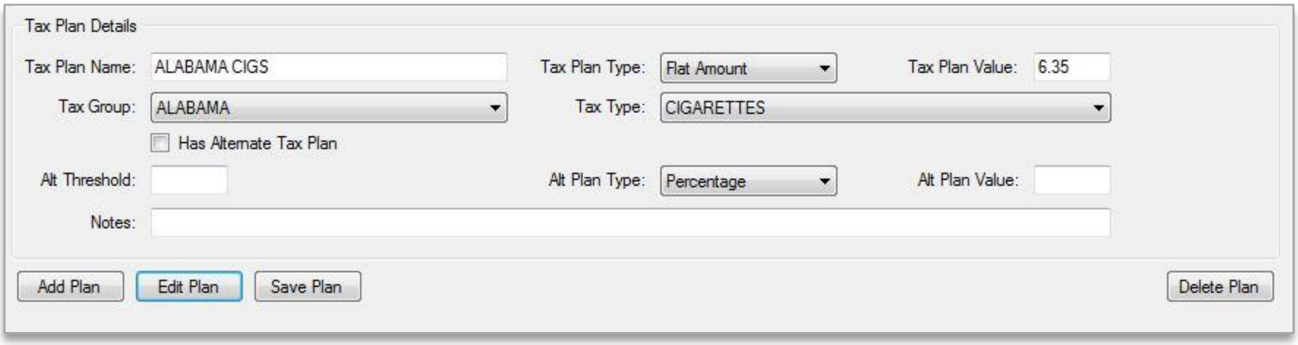
Tax Plans

Tax Plans tie the tax groups to the tax types.

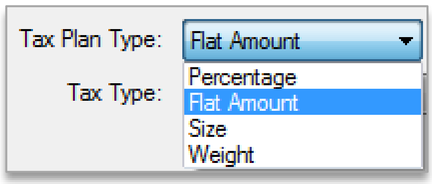
1) Click Add Plan

2) Enter the name of the tax plan

3) Set the tax plan type



4) Set the tax plan value



5) Select the tax group the plan will belong to

6) Select the tax type

7) Click Save Plan

If there is an alternative tax plan for Purchase Taxes:

1) check the box "Has Alternate Tax Plan"

2) Enter the Alt Threshold

3) Enter the Alt Plan Type

4) Enter Alt Plan Value

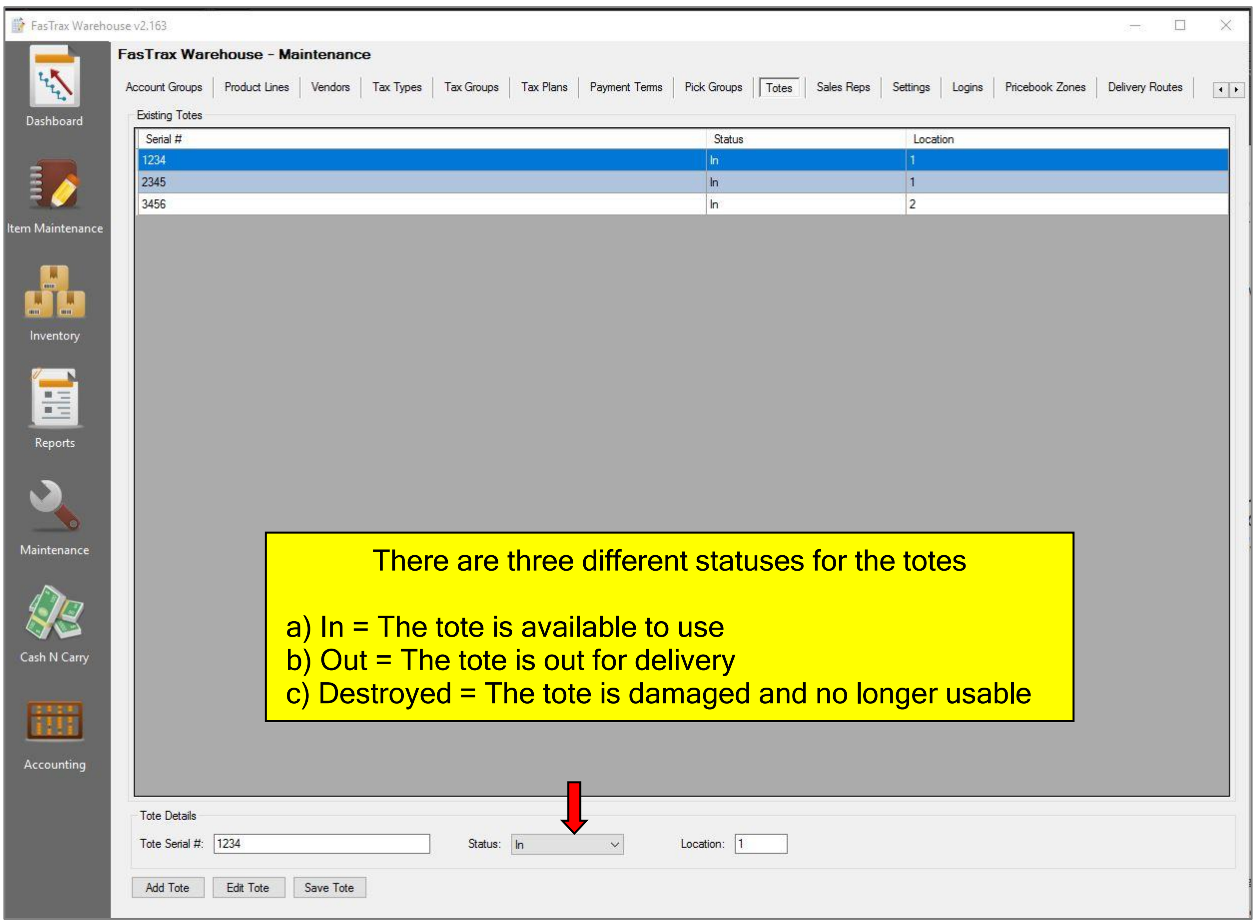
Totes

1) Click the add tote button to create a new tote

2) Enter the serial number for the tote

3) Enter the location of the tote

4) Click save tote



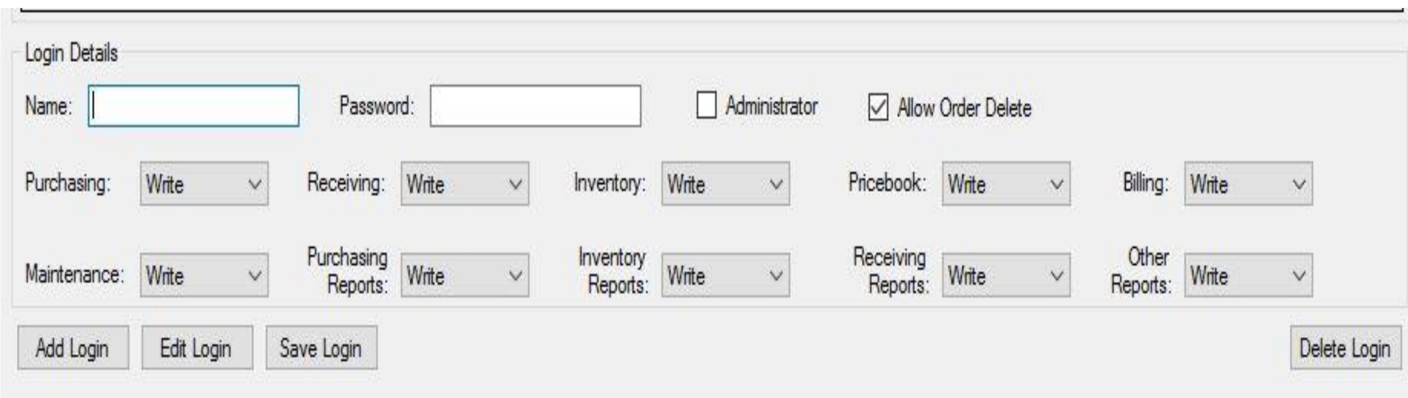
Logins

Create users and permissions to log into Warehouse

1) Click "Add Login"

2) Enter Name, password, and set permissions (give users read, write or no permissions for each field.)

3) Click "Save Login" once step 2 is complete.



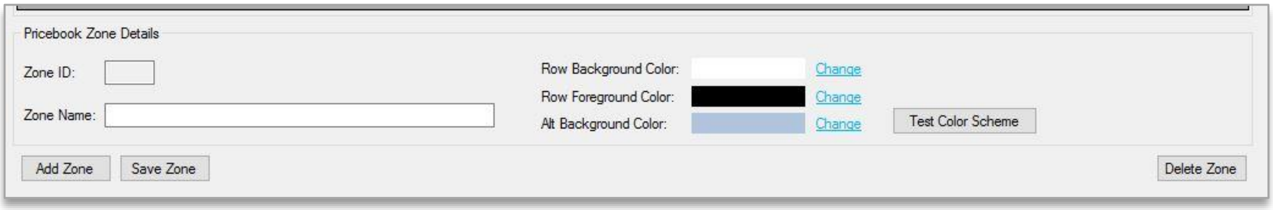
Pricebook Zones

Pricebook zones can be used like a pricing exception for specific accounts

1) Click Add Zone

2) Give the new zone a name (you can also set up different colors for different zones)

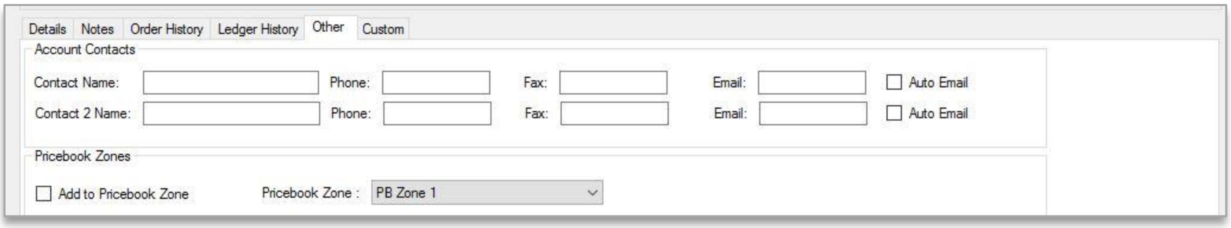
3) Click Save Zone



4) To add an account to the pricebook zone; go to the accounts tab.

5) Select to edit the account and go to the "Other" tab.

6) Check the box to Add to Pricebook Zone and select the zone.

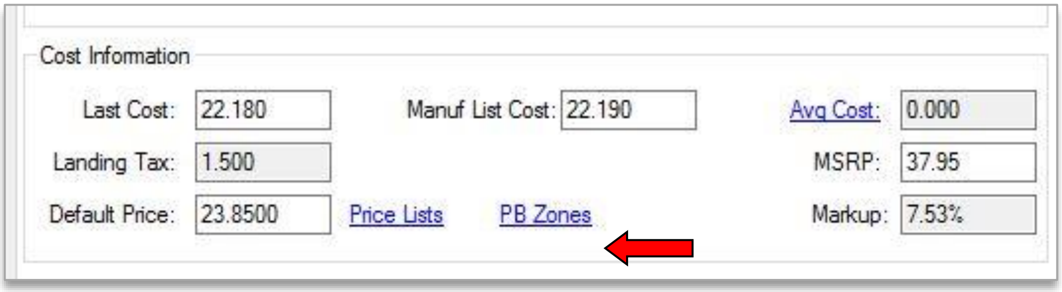


7) Save the account

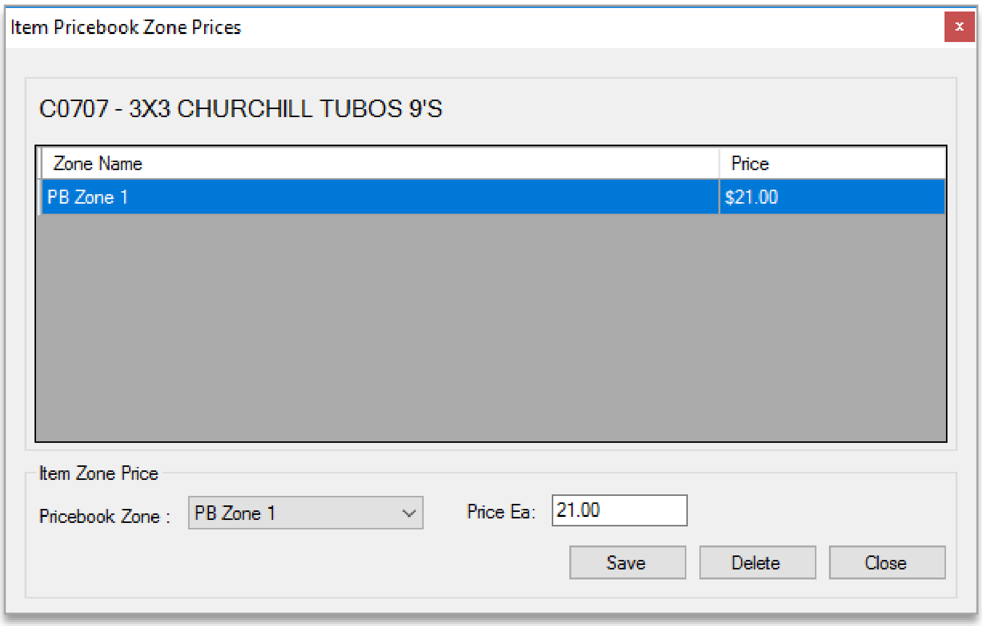
Now we need to set the items that will be in the Pricebook Zone

8) Go to Item maintenance and look up the item

9) Under cost information click on the link for PB Zones



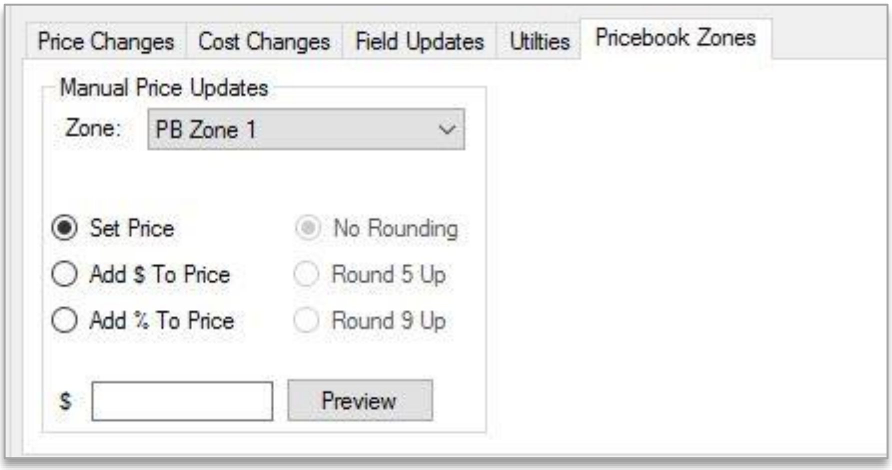
10) Select the Pricebook Zone to use and set the price for the item.



11) Save the price for the pricebook zone

You can also add items to a Pricebook Zone from Mass Updates

1) Under mass updates, go to the Pricebook Zones tab



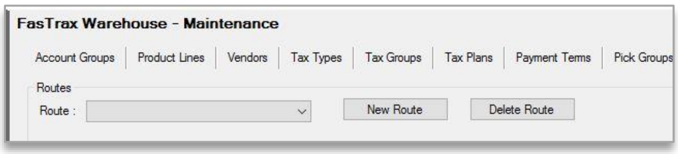
2) Filter to the items you want to add to the pricebook zone
(Remember that all items that show in the window will be affected)

3) Set the price and then click preview

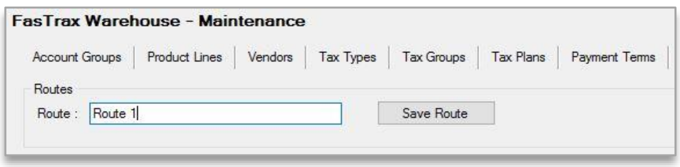
4) Click Apply Changes to save

Delivery Routes

1) Click new route



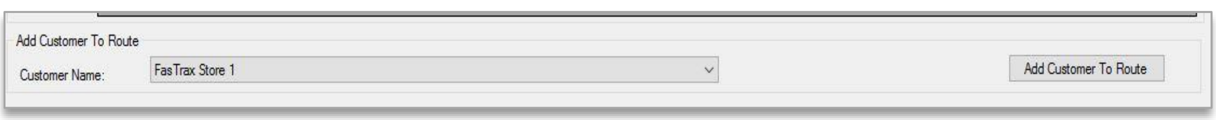
2) Enter the route name



3) Click Save route

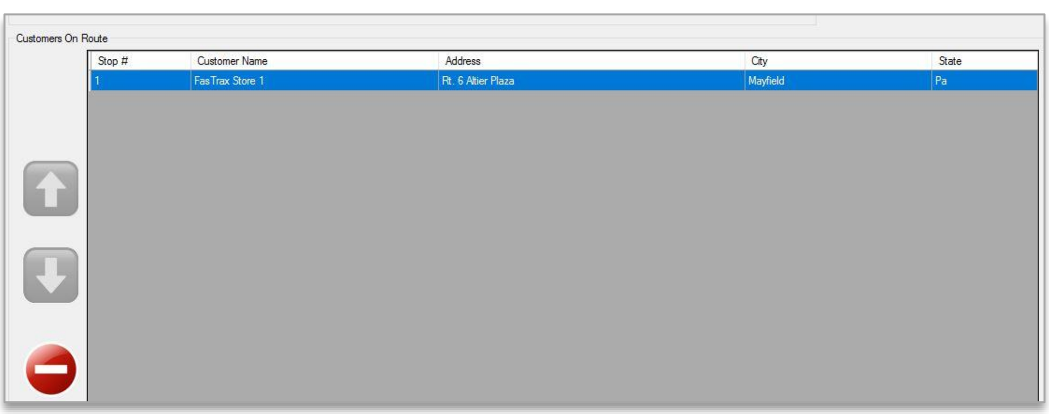
Now from the bottom of the screen we can add customers to the new route.

4) Select the customer name

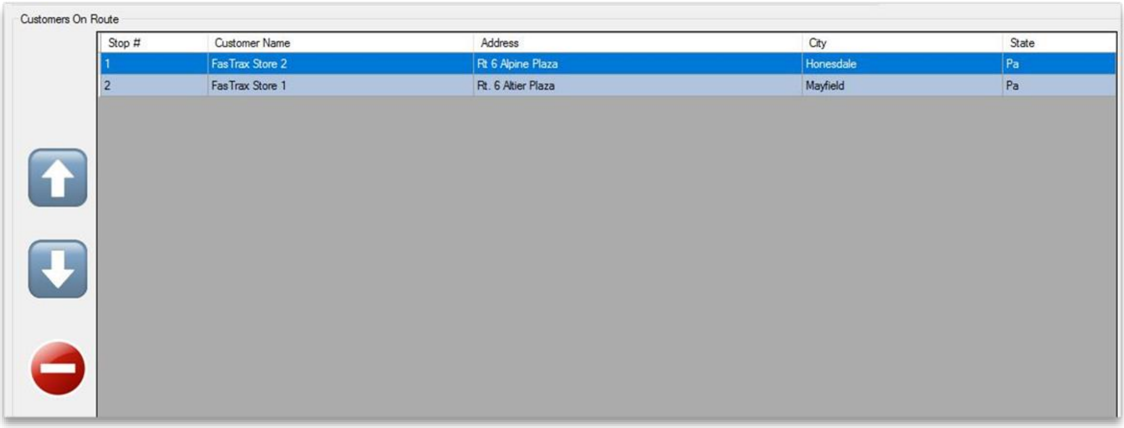


5) Click add customer to route

6) That customer now shows on the route.



7) After adding more customers you can change their stop number order by highlighting the customer and clicking the up and down arrow.



If you need to delete a customer from the route

8) Highlight the customer

9) Click on the red button

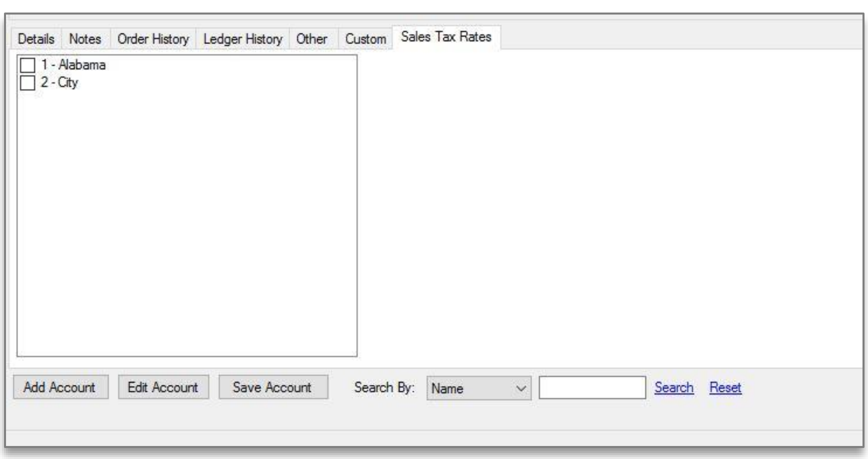
For Information on how to use totes/delivery routes please see "How to pick an order" in the Inventory Guide

Sales Tax Rates

Sales Tax are for items that will not be resold. An example is items that are sent to stores that will be used as store use items like paper towels.

1) Click Add Rate

2) Enter the Name for the tax rate.
3) Enter the amount for the tax rate.
4) Click save rate
5) To apply the sales tax rate to an account go to the Accounts tab in Maintenance
6) Select the account
7) Click edit account
8) Go to the "Sales Tax Rate" tab on the bottom portion of the screen.
9) Select the tax rate to apply to this account.
10) Click "Save Account"



For assistance, please contact Technical Support at Support@FasTraxPOS.com