

RQ4

Professional Services 12/28/2011

RQ4 Setup Guide

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RQ4 Setup Guide

The following document is intended as a reference guide. While much of the launch process will be completed for you by the Launch Specialist at each stage, you will be responsible for providing all requested data, and for completing the tasks described within. Any questions about the processes described within should be directed to setup@iqmetrix.com.

Introduction

Welcome to the RQ4 setup guide. This launch guide will guide you through the RQ4 setup/upgrade process from beginning to end. The setup process is broken down into 5 major stages.

Stage 1 – Getting Started

Stage 2 – Information Gathering & Data Import

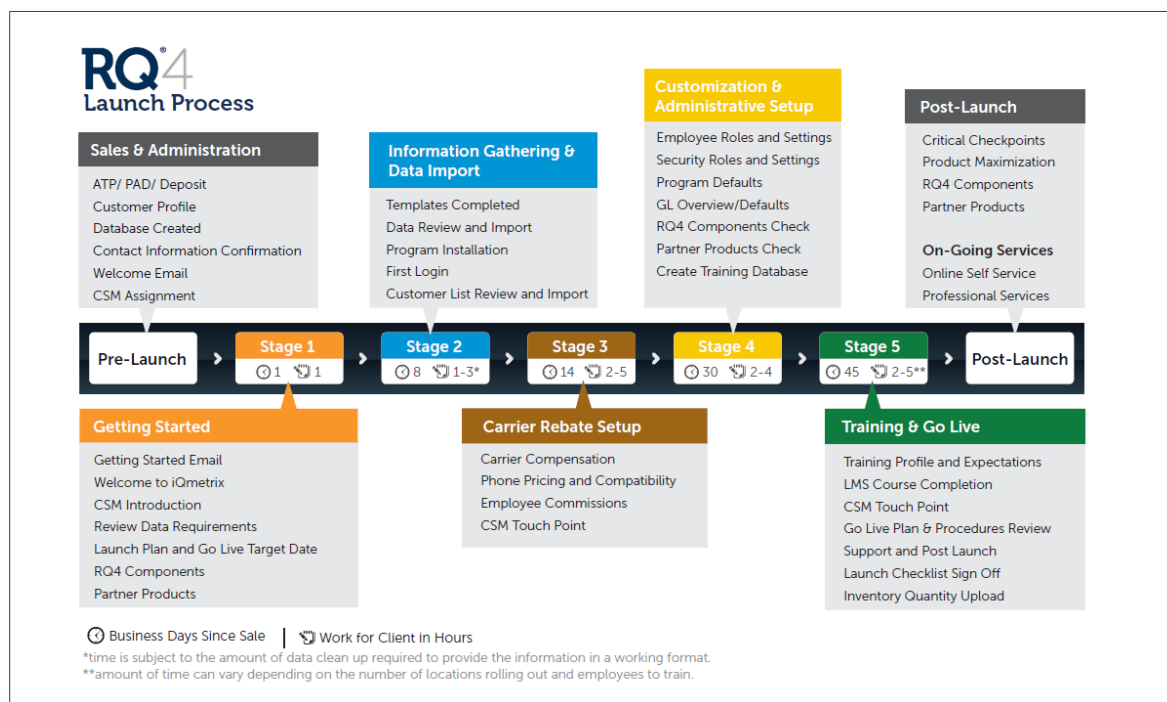
Stage 3 – Carrier Rebate Setup

Stage 4 – Customization and Administrative Setup

Stage 5 – Training/Going Live

Support and training information is available at <http://support.RQ4.com/content/impchart>. Access to this site and login information will be provided during Stage 1 of the launch process.

Diagram - Implementation Flow



NOTES:

- Average launch time is 3 – 6 weeks.
- Best Practice is to have a company employee 'own' this project (i.e. take responsibility for its success).
- Due to time constraints, a junior employee may be a more effective 'owner' of this project than a high-level employee.
- Delays will occur if crucial setup information is not made available to iQmetrix when requested.

Stage 1 - Getting Started

Overview of Stage 1 Steps:

1. Getting Started Email Received
2. Launch Plan and Go Live Target Date Set
3. Download RQ4 Setup and Import Template
4. Install RQ4 Software
5. Review RQ4 Components and Partner Products
6. CSM Check Point

Getting Started Email

At this point, you should have received the RQ4 Getting Started email. This email contains important information to help start the Launch Process for your Company. If you do not have this email contact our Launch team at setup@iQmetrix.com.

Getting Started Email Includes:

- RQ4 setup and import template link for download
- Setup and user instructions link for download
- RQ4 installer link
- Your database name, user name, & password (temporary)
- Link to free live training webinars

Launch Plan and Go Live Target Date Set

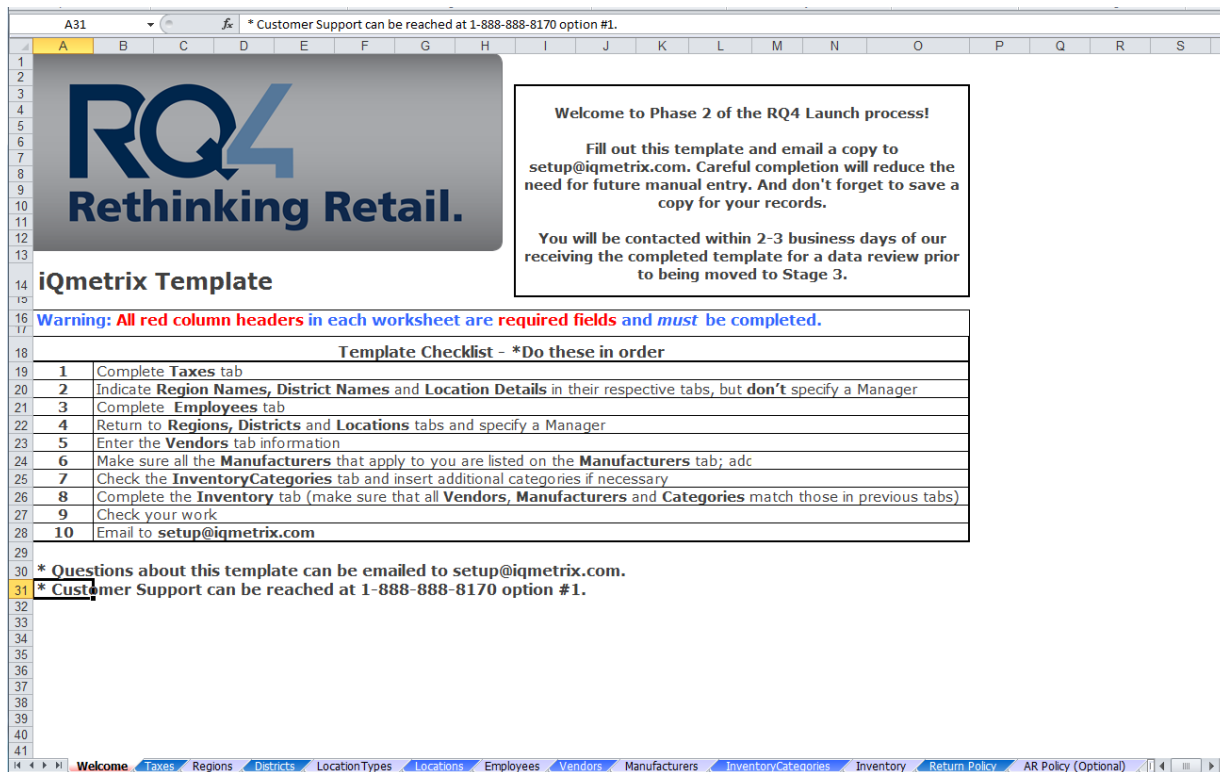
The Launch Plan is a five stage process to configure RQ4 for your business and have it ready to GO LIVE by the GO Live Launch date.

NOTE: Due to the fast pace and frequent changes inherent to the cellular or retail industries, adhering to the GO LIVE TARGET DATE is very important to ensure that all information entered into RQ4 does not become outdated prior to launch.

RQ4 Setup and Import Template (Data Requirements)

The RQ4 Setup and Import Template is an MS Excel template designed to guide you Stage 2 of the launch process. Download this template from the Getting Started email and save it to a convenient place on your computer. Directions for filling out this template are in Stage 2 of this document.

Click here to download the RQ4 Setup and Import Template: [RQ4 Data Import Template](#)



Program Installation

Installation of RQ4 Retail Management software on any computer involves a few easy steps. Before the software installation can begin, however, the following requirements must first be met on each workstation.

Minimum Workstation Specifications

- Workstation CPU Speed: Recommended 1.0 GHz PC +
- Workstation Memory:
- Windows XP: Minimum 500 MB RAM / Recommended 1GB RAM +
- Windows Vista: Minimum 1GB RAM / Recommended 2GB RAM +
- Windows 7: Minimum 1GB RAM / Recommended 2GB RAM +
- Monitor Resolution: Minimum 1024 x 768 / Recommended 1280 X 1024 +
- Monitor Size: Minimum 14" / Recommended 17"

- Video Card: Minimum 32MB + ATI or NVIDIA Graphics / Recommended 128MB +
- (Graphics with dual head required for customer facing support.)
- Hard Drive Space: Minimum 500 MB Available / Recommended 1GB Available
- Media Device: Recommended CD-ROM (not required)
- Workstation OS: Minimum Windows XP service pack 2, Microsoft .Net 4.0 (Client Profile & Extended Packages)
- Recommended Windows Vista, Microsoft .Net 4.0 (Client Profile & Extended Packages)
- Office Productivity Software: Recommended MS Office 2003 +
- Connection Speed: Minimum 56 kbps / Recommended 100 kbps + (Broadband, T1)
- Network firewalls / web filters must be configured to allow all files that contain iqmetrix.net, akami.net and filekicker.com.

NOTES:

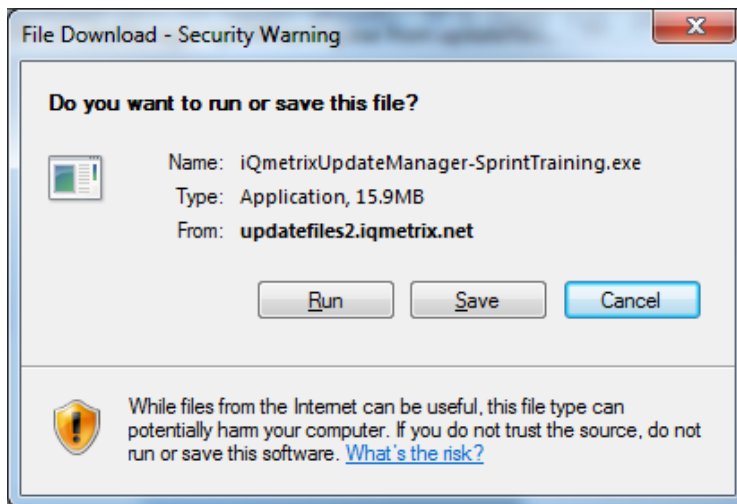
- IQmetrix has multiple server facilities in Canada and the US using a Sun Guard Data System which is a SAS70 compliant company. Their data integrity and back-up processes are sufficient to meet the most stringent of publicly traded company's requirements.
- All data is backed-up daily from the primary to a secondary to offsite storage facilities.

Program Installation Steps

If you have met the requirements in the previous section, you are ready to begin installing RQ4. Use the following steps to install RQ4 on your workstations:

1. To begin the installation process, you must ensure that you are logged onto Windows with an administrative login.
2. Using the link provided in the Getting Started email, click on the RQ4/RetailiQ installer link. Alternatively, go to <http://support.RQ4.com/> and log in with the database name, user name and password provided in the Getting Started Email. Go to **Support | Downloads | RetailiQ / RQ4** and click on **RetailiQ / RQ4.exe**.

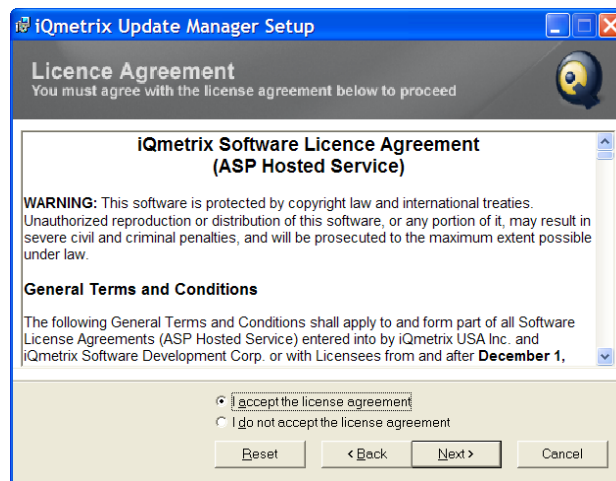
3. The following message will appear:



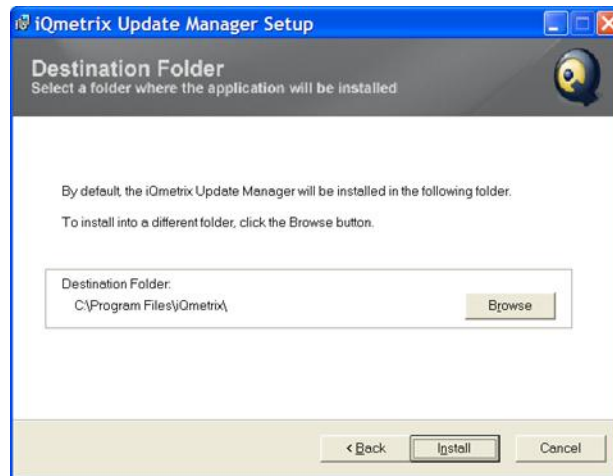
4. Click **Save**, and download the installer to your computer desktop or to another location of your choice.
5. Double click the downloaded installer file to begin the installation of RQ4. The installer will now check for the existence of Microsoft .NET Framework 4.0. The following message will be displayed.



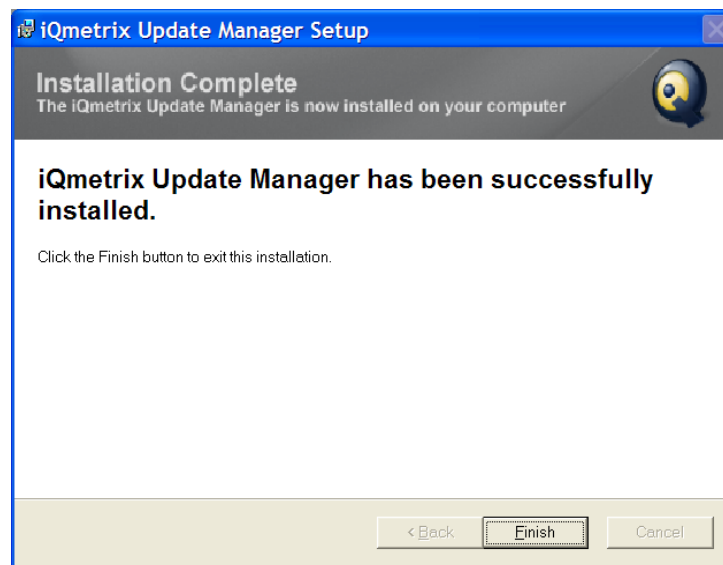
6. You must click **Install** to continue with the installation. The Licence Agreement will display.
7. Read the License Agreement, select *I accept the licence agreement* and click the **Next** button.



8. Leave the default settings for the program destination folder (below) and click the **Install** button to continue.



9. The following screen will be displayed when the installation is complete. Click **Finish** to close the screen.



10. Restart your computer to complete the installation.

Component & Partner Products

In addition to RQ4, iQmetrix is proud to offer you a variety of products to maximize your business potential. If you haven't already ordered any of the following products but wish to do so, contact setup@iqmetrix.com to begin the ordering process.

Biometrics

Directly integrated with RQ4, Biometrics provides your company with an added level of business security – using fingerprint scanning technology instead of passwords.

Customer Facing Screens

Fully integrated with RQ4, this service allows you to introduce a second monitor at the point of sale to enhance the in-store experience for customer.

Epins

Sell prepaid directly through RQ4 and earn competitive margins. Epins are bought and sold in one step, which saves you time and eliminates inventory errors and theft. You are only charged for what you sell.

Handset Protection

(no charge)

Streamline the warranty process at the point of sale with handset protection programs integrated with RQ4.

Protect Cell

Protect Cell Contact	Position	Email	Phone Number
Stephanie Allen	Support Contact	cgentry@esecuritel.com	(248) 319-0450

eSecuritel

eSecuritel Contact	Position	Email	Phone Number
Carter Gentry	Director of Account Management	Stephanie.Allen@protectcell.com	(678)436-5834
Clay Bodnarek	Sales	cbodnarek@esecuritel.com	(678)389-6238
April Hughes	Sales	ahughes@esecuritel.com	(678) 436-5845

Handset Trade-In

(no charge)

iQmetrix offers integrated handset trade-in programs that offer your customers in-store credit for their used handsets – this increases sales and attachment ratios.

We are proud to offer this service through Flipswap and Sprint Buyback.

Flipswap

Flipswap Contact	Position	Email	Phone Number
Chana Ming	Program Manager	cming@flipswap.com	(424) 237-1507

Sprint Buyback

Sprint Buyback Contact	Position	Email	Phone Number
Michelle Breashears	Program Manager	michelle.breashears@erecyclingcorps.com	(972) 573-0303

Integrated Bill Pay

(no charge)

Automate cash payment acceptance, making it faster, easier and more secure to sell wireless plans and services to cash-paying customers.

We are proud to offer this service through Precash and Tio.

PreCash

Many carriers accept payments through PreCash. Check with your carrier to confirm.

Precash Contact	Position	Email	Phone Number
Juan Correa	Support Contact	Juan.Correa@precash.com	(713) 600-2245

TIO

Carriers who accepted payments via TIO integration are AT&T Wireless Post Paid, Cricket Wireless Post Paid, Cricket Flex Bucket, and Cricket Paygo payments.Dealer

Tio Contact	Position	Email	Phone Number
Yasmin Ebrahimi	Support Contact	Yasmin.Ebrahimi@tionetworks.com	(604) 298-4636 Ext. 274

Payment Integration

iQmetrix offers an integrated payment processing solution to streamline the point-of-sale process and reduce the overall cost of credit card processing.

We are proud to offer this service through the following 3 partners: Heartland, Elavon and Chase Paymentech. After setting up an account with the provider that best suits your needs, contact us at setup@iqmetrix.com to integrate with RQ4.

Heartland Payment Systems

Currently offering Credit, Debit, Check and E3 functionality

Heartland Contact	Position	Email	Phone Number
Bob Payne	Sales/Technical/Support Contact	Robert.Payne@e-hps.com	(408) 293-7001

Elavon

Elavon offers credit, debit and check for U.S. clients.

Elavon Contact	Position	Email	Phone Number
Denise Atkinson	Account Manager/Tech & Support Contact	Denise.Atkinson@elavon.com	(281) 288-4917

Chase Paymentech

Chase Paymentech offers credit for U.S. and CDN clients.

Chase USA Contact

Chase CA Contact	Position	Email	Phone Number
Thom Thorne	Account Executive	Tom.Thorne@ChasePaymentech.com	(214) 849-3626
Jason Alldredge	USA Account Manager/Tech & Support Contact	Jason.Alldredge@chasepaymentech.com	(214) 849-3612

Chase Canada Contact

Chase USA Contact	Position	Email	Phone Number
Dwight Hildebrandt	CDN Account Manager/Tech & Support Contact	Dwight.Hildebrandt@chasepaymentech.ca	(204) 831-0239

PocketRQ

Ideal for many departments in your wireless retail business, PocketRQ allows you to access key RQ4 performance metrics, dashboard, and other reports from your smartphone or mobile browsing device,

TracPoint Loyalty Program

Create unique gift cards, mailers and loyalty programs that will build top-of-mind recognition for your business, with TracPoint Loyalty.

TracPoint Contact	Position	Email	Phone Number
Brad MacArthur	Account Manager	bmacarthur@tracpoint.com	(800) 404-4450 Ext. 801

Vendor Managed Inventory (VMI)

(no charge)

VMI is an automated inventory system that links processes and information from RQ4 directly to your supplier, creating an efficient and intelligent inventory solution that allows you to:

We are proud to offer this service through the following partners. Choose a partner, then contact setup@iqmetrix.com to get started.



Company	Company Contact	Email	Phone Number
Offwire	Kevin Lubbers	klubbers@offwire.com	(402) 884-2911
Tessco	Mollie McDonnell	mcdonnellm@tessco.com	(410) 229-1246
Technocel	Byron Williams	byron.williams@technocel.com	(800) 843-5600 Ext. 106
Mobile Line	Lucien Eldred	lucien.eldred@mobileline.com	(714) 247-2547
WireX	Scott Johnson	sjohnson@wirexgroup.com	(866) 848-7602

CSM Checkpoint

Every iQmetrix client is assigned a Customer Success Manager (CSM) to provide you with a consistent resource / contact person after the launch process is complete. At this point you will be contacted by your CSM for an introductory call. Throughout the launch process, however, your main contact person will continue to be the Launch Specialist in each stage. Use the setup@iqmetrix.com email address to contact any Launch Specialist or email them individually.

Stage 2: Information Gathering and Data Import

Overview of Stage 2 Steps:

1. Complete the RQ4 Setup and Import Template / submit to Launch Team
2. Database Review
3. Customer List Review and Import (optional)

Complete RQ4 Setup and Import Template

The RQ4 Setup and Import Template is used by the RQ4 Launch team to enter starting information into your new RQ4 database. This template is an MS Excel workbook containing multiple worksheets (tabs). Note the following:

Welcome Sheet

The Welcome sheet contains a **Template Checklist** describing the order required for completing the sheets. Since many of the worksheets contain 'linked' information, you *must* follow these steps in the exact order described, or you may not be able to fill out some of the sheets.

Inventory Sheet

It is critical that you complete **all** required (red) columns on the Inventory sheet. Failure to do so will prevent the Stage 2 Launch Specialist from successfully completing the data import.

Some columns in the Inventory sheet will be based on previously completed sheets. For instance, only categories already entered on the **Inventory Category** sheet will be available for selection in the Inventory sheet.

You may not have all your accessory product information at this time. You should, however, have a list of the phones you will be selling. If you can submit your list of phones now, you may send us your list of accessories later in the launch process. Phones *must* be imported prior to advancement to Stage 3 since they are an integral part of the Stage 3 setup.

*Although it is more time consuming now, it is suggested that you complete at least one of the optional product identifier columns in this sheet (i.e. Vendor SKU, Manufacturer SKU or HPC Barcode). Best practices suggest that product identifier currently on your product labels be used to allow scanning products for easy search, sales or purchase order addition.

Questions about the Template

Email any questions or requests for a phone call to setup@iqmetrix.com.

Completed Template

When you have completed the import template, send it to setup@iqmetrix.com. The Stage 2 Launch Specialist will import this data into your customized database.

Database Review

You will be contacted by the RQ4 Stage 2 Launch Specialist when your data has been successfully entered into your database. You will complete a brief database review with the Launch Specialist who will then move you to Stage 3.

At this point, you should log into your RQ4 database and familiarize yourself with your inventory structure (Inventory icon). Use the following steps to log into RQ4:

RQ4 Login

1. Double click the **RQ4** icon on your desktop. RQ4 will check for updates and download any that are outstanding prior to displaying the the login screen.
2. From the login screen, choose the correct client name and environment. For normal business purposes, choose **(Live)**. Click **OK**. The Login window will appear.



3. Enter the user name and password provided by iQmetrix in the Stage 1 Getting Started email.



4. The RQ4 main form will be displayed. All menu options are available by clicking on the menu icons at the bottom of the screen, or the menu drop down lists at the top.

Customer List Import (Optional)

You may wish to copy your existing customer base from your previous POS into RQ4. Although there is an Import Customer Wizard available in RQ4, we suggest that you let us do that import for you.

For your part, copy your customer data into this MS Excel template after reading the NOTES: below:
[Customer Import Template](#)

Send completed template to setup@iqmetrix.com for import.

Required Fields

The only required fields are the First Name and Last Name columns OR the Company Name column. If you fill in all 3 of these columns for a customer, 2 separate customer profiles will be created with the same address information. They can be linked later in RQ4 in the Customer module.

Data Formatting

Be sure to 'clean up' your data, ensuring that it meets formatting standards. For instance, all phone number fields must contain exactly 10 digits, and must be numeric. I.E. (555)555-5555 is acceptable. Do not enter any alphabetic characters in the number fields.

Customer Profile Custom Fields

In addition to the columns listed in the template, you can request up to 6 custom fields: 2 numeric, 2 text, and 2 date fields. Data can be uploaded to these custom fields. Be sure to label the new columns in the template according to the names you want to see in the custom fields.

Stage 3: Carrier Rebate Setup

Overview of Stage 3 Steps:

1. Stage 3 Introductory Email Received
2. Carrier Commission Schedule Provided to Launch Specialist
3. Price Sheet Template: Fill In Phone Prices and Rebate (Subsidy) Amounts
4. Stage 3 Training Call / Employee Commissions Setup

Stage 3 Introductory Email Received

At this point you should have received the Stage 3 Introductory email from the Launch Specialist. If you haven't received this, please contact setup@iqmetrix.com.

Stage 3 Introductory Email Includes:

- Overview of Stage 3 steps
- Request for carrier compensation schedule and features list
- Contact information for submitting this data

Carrier Compensation Provided to Launch Team

Fax or email a copy of your carrier commission schedule containing the list of your rate with the rebate amount you will earn under each term. Usually, the commission schedule pages out of your contract will be ideal.

You should also provide a list of your features (add-ons) at this time, and the rebate (spiff or subsidy) amounts you will earn from the carrier for each feature.

If you do not know what to send, please reply to the Stage 3 Introductory email with questions or to request a phone call from the Launch Specialist.

Send all information to the contact information provided in the Stage 3 Introductory Email, or to setup@iqmetrix.com.

The Launch Specialist will set up a Carrier Pricing Sheet in your database using the information provided. Allow 2 – 5 days for this initial setup phase.

Price Sheet Template: Fill In Phone Prices

After your initial price sheet setup is complete, your Launch Specialist will use it to create a price sheet template, which will be emailed to you as an Excel workbook. This template will contain a list of your phones under your Carrier Terms.

You must enter the following information into this template:

1. Retail Phone Price: This is the suggested retail price (not including tax) for each phone under each term. I.E. It is the retail price that the customer will pay at the point of sale.
2. Equipment Rebate Amount: This is the equipment spiff or subsidy that you expect to receive from the carrier for each phone (equipment) on the template. If you do not receive a rebate for a phone, enter 0.

After completing your price sheet template, send to the Stage 3 Launch Specialist, who will import the data into your database.

At this point, you will be contacted by email to book the Stage 3 training call. You will also receive the **Employee Commission Setup** document.

If you do not receive a meeting request within 2 business days, please contact setup@iqmetrix.com.

NOTE: Before taking the Stage 3 Training call you should have:

- Installed RQ4 on the computer used for the call
- Read the Employee Commission Setup document: [Employee Commission Setup](#)

Stage 3 Training Call / Employee Setup

The Stage 3 training call typically takes 1 to 1 ½ hours and will cover the following:

- How the price sheet works
- How to keep price sheet up to date
- Promotions
- Employee Commissions Setup

Anyone who will be doing inventory / carrier commission type updates should be included in the training call.

You will receive the Update Price Sheet Guide to provide you with easy reference for all future price sheet updates. [Update Price Sheet Guide](#)

Reconciling Your Vendor Rebates

RQ4 will track of all transactions regarding your Carrier rebates earned, however best practices require that you do monthly reconciliations between the RQ4 data and the monthly reports you receive from your Carrier, and update RQ4 using adjusting entries.

You will not be able to reconcile your vendor rebates until at least a month of transactions have been made. You are responsible for ensuring that you understand this process, and we recommend that you make use of the free training webinars that are held on this topic each month, or use the RQ4 training videos or Help Files.

Monthly Training Webinar: Occurs at 2 pm Central time on the second Tuesday of each month. Register at <http://iqmetrix.webex.com>.

Training Video: Go to RQ4 | Videos | Finance | Reconcile Vendor Rebates.

Stage 4 – Customization and Administrative Settings

Stage 4 Training Call Topics

1. Employee Roles and Settings
2. Security Roles and Settings
3. G/L Setup
4. Bill Pay Setup (Non-Integrated)
5. Create Training Database

Stage 4 Training Call

This stage consists of the Stage 4 training call which takes between 1 ½ and 2 hours. The following topics will be covered during the training. Use the following sections for review:

Employee Roles and Settings

Employee roles are used in RQ4 for enabling, disabling or locking Widget access on the Home screen. Force Punch-in and Idle Time (Screen Lock) settings are also found in this module.

Set up or modify employee roles in **Employees | Employee Role Setup**.

Security Roles

Security roles are assigned while creating new Employees. The 3 initial security roles are Administrator (unrestricted), Store Manager, and Store Clerk. The Store Manager and Store Clerk roles by default have very limited access in RQ4.

Adding / Removing Security Access

Go to **Settings | Human Resources | Security Screen Setup** to change access levels to any security role on a screen by screen basis.

Creating New Security Roles

Any number of new security roles can be created in **Settings | Human Resources | Security Screen Setup | Security Role Setup**.

G/L Account Setup / QuickBooks Export (Optional)

If you intend to export all financial data to QuickBooks or some other accounting software, you may need to make changes to the default G/L settings in RQ4 prior to exports.

We recommend that you create a QuickBooks database backup to use as a 'test' environment to do your first RQ4 import. This way any issues can be dealt with before exporting to your live QuickBooks database.

Preparation Prior to QuickBooks Export

Use the following steps to set up RQ4 and QuickBooks prior to export.

1. **Match G/L Accounts in RQ4 to QuickBooks:** Go to **RQ4 | Finance | G/L | G/L Account Setup**. Makes sure that all G/L accounts here match all G/L accounts in QuickBooks. Use the G/L Account List report (found in the same place) for a list of current RQ4 accounts.

NOTES:

- The G/L and QUICKBOOKS account numbers must match. Best Practice says the names should match too, but this is not required unless you are using the Bills option (mentioned below).
- Any G/L names / numbers can be changed and will still be mapped to the same products. However if you are changing any product G/L defaults and then deleting the old ones, be

sure to change all default G/Ls using the **RQ4 | Reports | Regular Product Master List**, **Non-Stocked Product Master List** or **Vendor Rebate Master List** report first.

2. **Change Product G/L Defaults:** (Optional) Go to **RQ4 | Settings | Finance | G/L | G/L Defaults**. You can change the G/L Defaults for each product. If you do, you must change all existing products to reflect the same G/L accounts. Use one of the 3 Product Master List reports to make the changes. You may want to leave the default blank for new products if provide g/l accounts with choices – such as COGS Phones and COGS Accessories - which will force the user to choose the correct account when making new product.
3. **Create RQ4 Customers in QuickBooks:** Two customers must be created in QuickBooks prior to the export.
 - RetailiQ Customer AR – for all of the accounts receivables
 - RetailiQ Vendor AR – for all of the vendor rebates
4. **Create Tax Vendor:** In **RQ4 | Settings | Finance | Inventory | Vendor**, click new to set up a Vendor named “Receiver General” or “Tax Vendor” etc. Do the same in **RQ4 | Settings | Finance | Inventory | Vendor Account**. Make sure this Vendor is mapped to the A/P Control (or some other) liability account. Now go to **RQ4 | Settings | Finance | G/L Account Setup | 2000: Tax Collected Account** and set the QuickBooks tax accounts require a vendor dropdown list to reflect the vendor account you just made. Do the same for 5300:Tax Paid Account.
5. **Use Location Abbreviation as Class:** (Optional but recommended) Go to **Settings | Location Setup | Code** and in the Code field, enter the abbreviations for the location (ideally, preface with a colon). This will show up in the G/L Activity report as well as the QuickBooks export to indicate location (called Class in export).

ISTYPE	DATE	ACCNT	CLASS	AMOUNT
JAL JOURNAL	09/29/10	1050		8426.85
JAL JOURNAL	09/29/10	1200	AHO	20542.66
JAL JOURNAL	09/29/10	1200		19167.96
JAL JOURNAL	09/29/10	2000		-559.52
JAL JOURNAL	09/29/10	2000	AHO	-107.45
JAL JOURNAL	09/29/10	2400		-761.59
JAL JOURNAL	09/29/10	4000		-5392.46
JAL JOURNAL	09/29/10	4000	AHO	-2148.89
JAL JOURNAL	09/29/10	4100		-6972.13

6. Read the documents in **Help Files | Index | Finance | General Ledger Overview** and especially the following:
 - Understanding the QuickBooks Export
 - Integrating RQ4 with Accounting Systems

- QuickBooks FAQs
- Posting to Accounting Software - Recommended Practices
- General Ledger Account Mapping

Quick Books Export

When you are ready to batch out, go to **Finance | G/L | G/L Account Activity Report**, choose the correct date range, and click the **Export to QuickBooks** button.

Each item exported from RQ4 will be flagged as exported and cannot be exported again. To toggle an export back so it can be re-imported, go to **Finance | G/L | Update Exported Items** to display the exported files. Use the **Toggle** button to remove the Exported check boxes and click **Save**.

Exported	Date	Location	Account #	Source	Source Type	Debit	Credit
<input checked="" type="checkbox"/>	9/14/2010	Whistler	2300	BCLNBP01	Receive PO (& Come...	\$0.00	
<input checked="" type="checkbox"/>	9/14/2010	Whistler	1200	BCLNBP01	Receive PO (& Come...	\$180.00	
<input checked="" type="checkbox"/>	9/14/2010	Whistler	1200	ABAHOT01	Transfer	\$0.00	
<input checked="" type="checkbox"/>	9/14/2010	Calgary Head Office	1200AHO	ABAHOT01	Transfer	\$180.00	
<input checked="" type="checkbox"/>	9/16/2010	Calgary Head Office	2300AHO	ABAHOT01	Receive PO (& Come...	\$0.00	
<input checked="" type="checkbox"/>	9/16/2010	Calgary Head Office	1200AHO	ABAHOT01	Receive PO (& Come...	\$200.00	
<input checked="" type="checkbox"/>	9/16/2010	Calgary Head Office	1200AHO	ABAHOT02	Inventory Adjustment	\$0.00	
<input checked="" type="checkbox"/>	9/16/2010	Calgary Head Office	5050AHO	ABAHOT02	Inventory Adjustment	\$180.00	
<input checked="" type="checkbox"/>	9/16/2010	Calgary Head Office	1200AHO	ABAHOT03	Inventory Adjustment	\$0.00	

QuickBooks Optional Settings

Bills Option

Found in **Settings | Company Settings | Finance**, default setting is deselected so all transactions will be exported as General Journal listings. If this setting is selected, the A/Ps will be exported as Bills.

No Purchase or Transfer Order Export

When this is selected in **Settings | Company Settings | Finance**, the PO and TO items will not copy down during export.

Bill Pay / Deposit Setup (Non-Integrated)

The Bill Pay section is used to track any transaction where you collect money to give to a vendor. This will remove those types of transactions from your gross profit calculations. The following components can be used to set up Bill Pay in **Settings | Point of Sale | Bill Pay Setup**.

Vendor Deposit

This is a fee collected from the customer and given to the vendor. This is added to the payment on the Bill Pay invoice. This is not taxable.

Vendor Rebate

Tracks any rebate amount received from the vendor. This will count towards your gross profit.

A \$0, serialized Vendor Rebate Product with tracking number and enforced length must be created in inventory and mapped in Bill Pay Setup. It is taxable but is not normally taxed.

Store Charge

This tracks any fee that you charge the customer for the Bill Pay and will be added to the payment on the Bill Pay invoice. This will count towards your gross profit.

A \$0, Non-Stocked Product must be created in inventory. This can be serialized if you want to force a tracking number to be added. It is taxable but is not normally taxed.

Payment

The payment is the payment amount received from the customer that is given to the vendor. This is not taxable. (Tax should be included in payment amount where required.)

Bill Pay Transaction

After setup, collect a Bill Pay in **Sales | Tools | New Bill Pay / Deposit**.

Bill Pay Report

Track your bill pay transactions in **Reports | Bill Pay History Report**.

Create Training Database

Your Stage 4 Launch Specialist will create you a training database. It is an exact copy of your live database as of 12 am last night. It is a separate database, however, so you may use this for testing and training without affecting Live data.

The training database is free during launch and until 2 months after your 'Go Live' (commencement) date. At that point you will be given the option to 'Opt Out' or to keep the training database for a monthly charge.

Refresh Training DB

We can 'refresh' your training database at any time by overwriting it with a new copy of your live database (from 12 am on the previous evening). You may send any 'refresh' requests to setup@iqmetrix.com.

Logging in

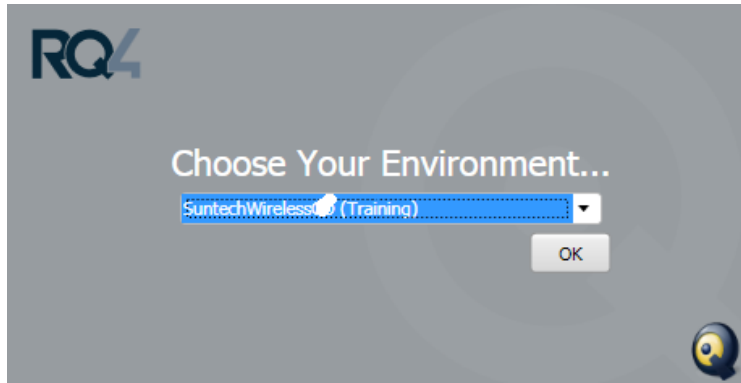
Log in to the training database by opening the RQ4 shortcut, as usual, and choosing the training database from the drop-down list that displays. Use the same username and passwords that you use in the Live database.

Login Error

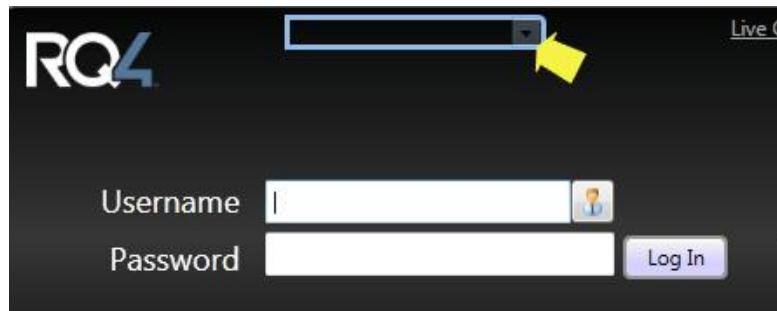
If you are getting a 'Please select a client' error when trying to log into your RQ4 training database, and you are sure you are using the correct password, use the following workaround:

There is a 'hidden' dropdown list at the top of the login screen. Hover over it with your mouse to see the database names (i.e. live and training). You must select it from the database drop-down list before you log into RQ4. See the steps below:

1. Choose your training database.



2. Now hover over the blank space at the top of the login screen and choose the training database again.



3. Enter your username and password and click Log In.



Miscellaneous Administrative Settings

Setting the Company Name

The company name will appear on till tape receipts only if a logo is not uploaded. Enter your company name in **Settings | General Setup | Company** text box.

Upload Company Logo

Your company logo will appear at the top of sales and returns invoices. The location address will display under the company. Go to **Settings | General Setup | Logo** to upload your logo file.

Use an appropriately sized gif, bmp or jpg image file. Maximum logo size is 100kb, 2 inches wide x 0.667 inches high. If the uploaded logo is not displaying correctly, please forward the logo file to setup@iqmetrix.com.

SMTP Server Setup

Create the SMTP Server connection [**Settings | SMTP Server Setup**] and set up each employee's personal email settings in their Employee Profiles.

Stage 5 Training / Go Live

Stage 5 Training Call Topics:

1. Training Profile and Expectations
2. Inventory Management / Import Inventory Quantities
3. Procedures Review
4. Support and Post launch Expectations
5. CSM Check Point

Stage 5 Training Call

This stage consists of the Stage 5 training call which takes between 1 and 1 ½ hours. The following topics will be covered during the training.

Training Profile and Expectations

A training plan will be discussed with the Launch Specialist regarding general training. Expectations for actual 'Go Live' date will be set.

Inventory Management / Import Inventory Quantities

Overview

Congratulations for completing the RQ4 setup! You are now ready set up your inventory quantities and begin selling product. This following section will provide you with instructions for setting up your inventory quantities whether or not you are starting with existing or brand new inventory.

You have 2 options for setting your inventory quantities.

- Starting Count Sheets: Recommended with existing inventory / legacy POS system
- Starting Purchase Orders: Recommended with new inventory / new store or when you are only using 1 or 2 vendors.

Starting Count Sheets

If you are already selling inventory in your store, you can import the product counts (quantities) into RQ4 using count sheets to do a manual count or to enter a count exported from your current POS system. This process has been broken down into 2 steps as follows:

- Step 1 – Create the Starting Count Sheets
- Step 2 – Import Count Sheets into RQ4

Note: A starting Count Sheet can only be used *once* at a location. All subsequent inventory must be added with purchase orders.

Step 1 – Create the Starting Count Sheets


All of your inventory products were added to RQ4 during Stage 2 of the Launch process. Using the **Regular Product Master List**, you will create 2 Starting Count Sheets (one each for serialized and non-serialized products) for each location. Use the following sections:

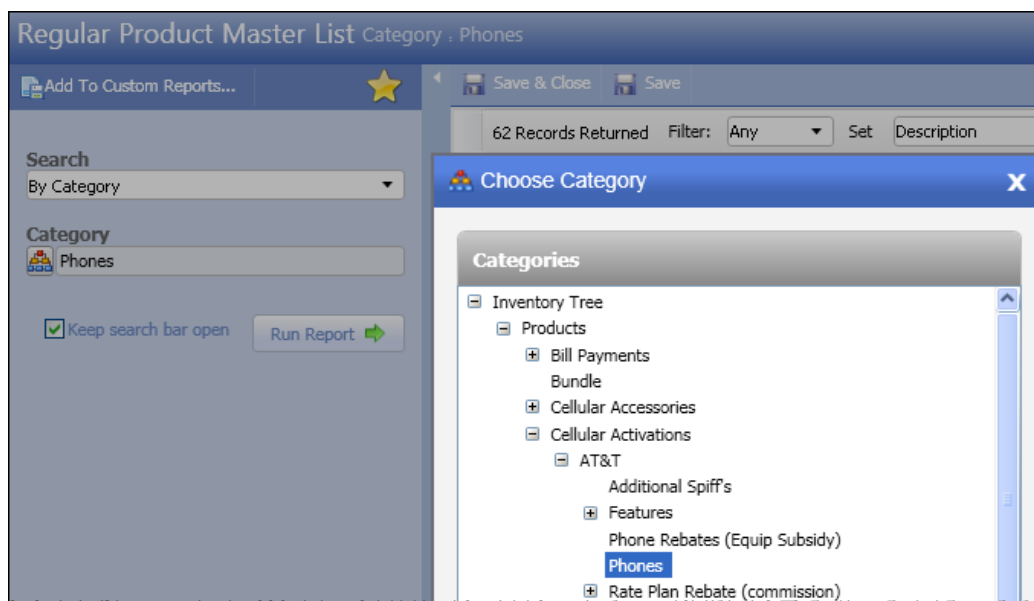
Warnings:

- Your inventory **must** be current. Add any new products *before* creating your count sheets (see **Support | Help Files** or the RQ4 Setup Guide for details.)
- The **Description** column values should **not** be modified. They must be an exact match to the description values in RQ4. Any description changes should be made before you create the Starting Count Sheets.
- The **Vendor SKU** and **Manufacturer SKU** column values are optional. They can be included **only** if they are *not* already existing in the product SKU properties in RQ4 for that item.

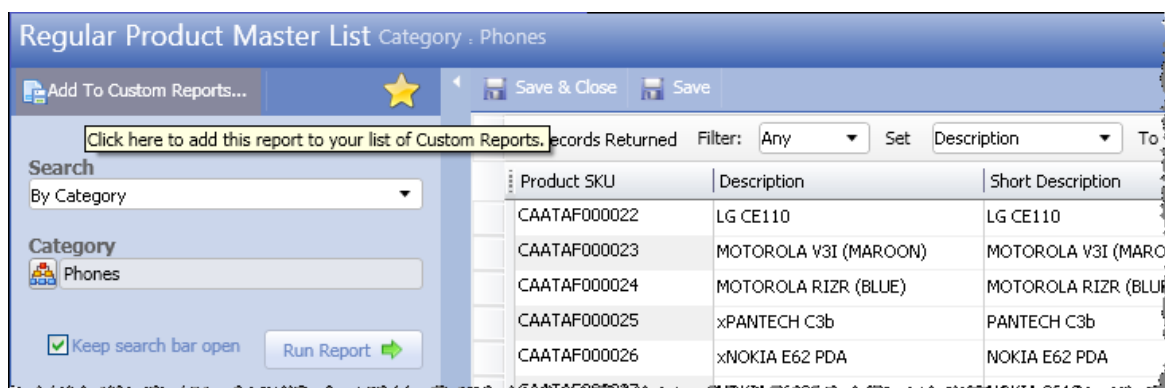
Create Starting Count Sheet for Phones (Serialized Items)

Use the following steps to create the Starting Count sheets for phones and other serialized items.

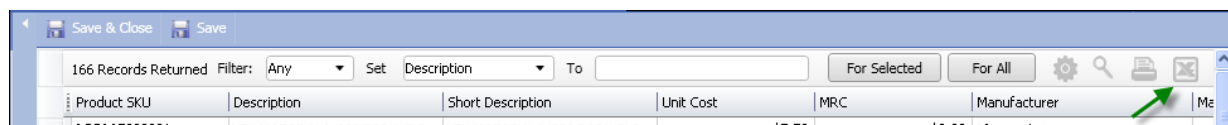
1. In RQ4, go to **Reports** and search for **Regular Product Master List**. Double click to open the Regular Product Master List screen.
2. In the Search Options frame, choose to search **By Category**. Under Category, click the **Mapping** button  and choose **Phones (or Equipment)** from the Product tree to ensure that all serialized products are included.



- Click Run Report. All of your serialized items will be displayed.



- Click on the Excel icon to open the report in MS Excel. Save it to your computer as **Phone Count Sheet LocationName** or something similar. This will be your Starting Count Sheet for phones (serialized items.)



- To finish the count sheet, open **Phone Count Sheet LocationName** in Excel.

Product SKU	Description	Short Description	Unit Cost	MRC	Manufacturer	Manufacturer SKU
CAATAF000022	LG CE110	LG CE110	\$139.28	#####	Aftermarket	64736 P
CAATAF000023	MOTOROLA V3i (MAROON)	MOTOROLA V3i (MAROON)	\$0.00	\$0.00	Aftermarket	SA3744AT
CAATAF000024	MOTOROLA RIZR (BLUE)	MOTOROLA RIZR (BLUE)	\$0.00	\$0.00	Aftermarket	5.02532E+12 P
CAATAF000025	xPANTECH C3b	PANTECH C3b	\$0.00	\$0.00	Aftermarket	64686 P
CAATAF000026	xNOKIA E62 PDA	NOKIA E62 PDA	\$0.00	\$0.00	Aftermarket	64591 P
CAATAF000027	NOKIA 2610	NOKIA 2610	\$0.00	\$0.00	Aftermarket	64681 P
CAATAF000028	xNOKIA 6085	NOKIA 6085	\$0.00	\$0.00	Aftermarket	64687 P
CAATAF000029	MOTOROLA RAZR2 V9	MOTOROLA RAZR2 V9	\$0.00	\$0.00	Aftermarket	64753 P

- Remove all columns (right-click on column letter and choose Delete) except Description. Add a new column header titled ESN or IMEI. (See below). This is your Starting Count Sheet for phones.

Description	ESN
LG CE110	
MOTOROLA V3i (MAROON)	
MOTOROLA RIZR (BLUE)	
xPANTECH C3b	
xNOKIA E62 PDA	


- The Phone Starting Count Sheet is completed by entering the ESN numbers each phone. Copy each row containing a phone description and paste it below the original, creating one for each ESN number.

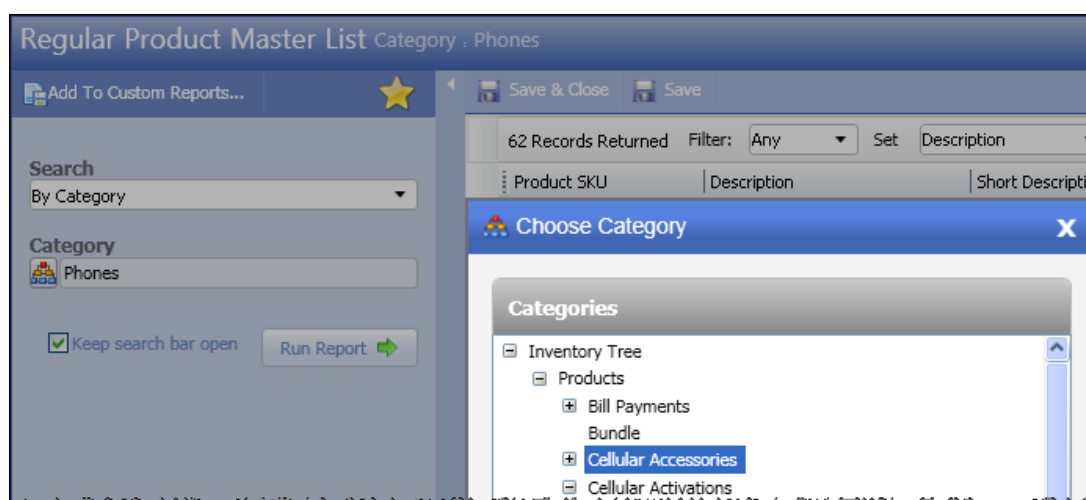
	A	B	C
2			
3	Description	ESN	
4	LG CE110	123456789	
5	LG CE110	123456790	
6	LG CE110	123456791	
7	NOKIA 2610	234567891	
8	NOKIA 2610	234567892	
9	NOKIA 2610	234567893	
10	MOTOROLA RAZR2 V9	345678912	
11	MOTOROLA RAZR2 V9	345678913	

- Repeat the previous steps for each location.

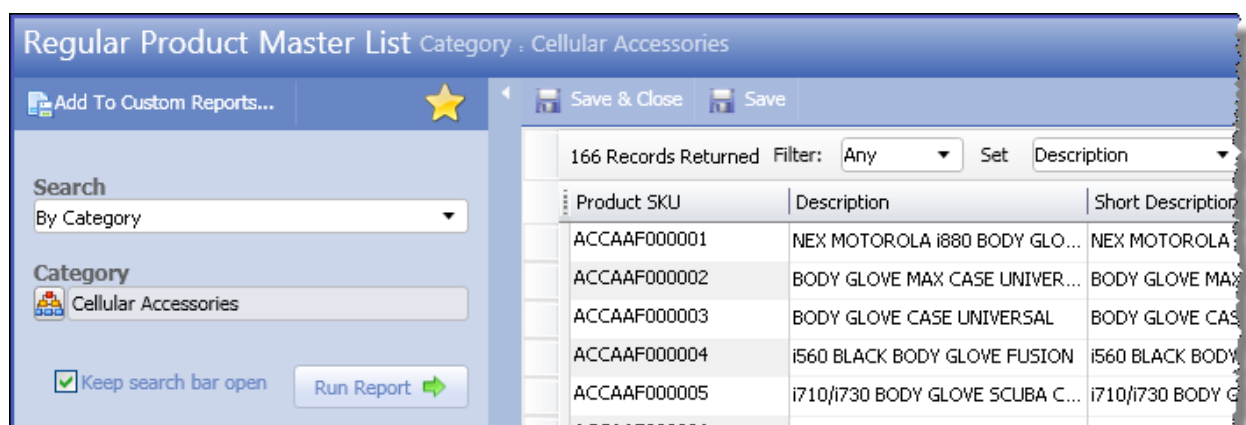
Create Starting Count Sheet for Accessories (Non-Serialized Items)

Use the following steps to create the Starting Count sheets for accessories (non-serialized items.)

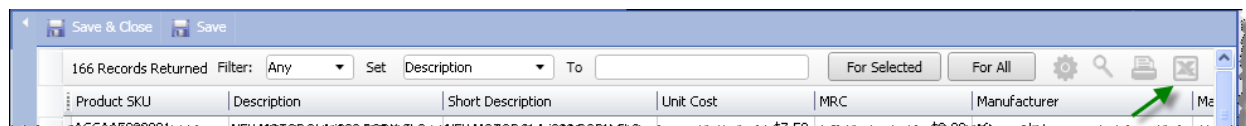
- To create the Starting Count Sheet for Accessories, return to the Search Options frame. Under Category, click the **Mapping** button  and choose Cellular Accessories.



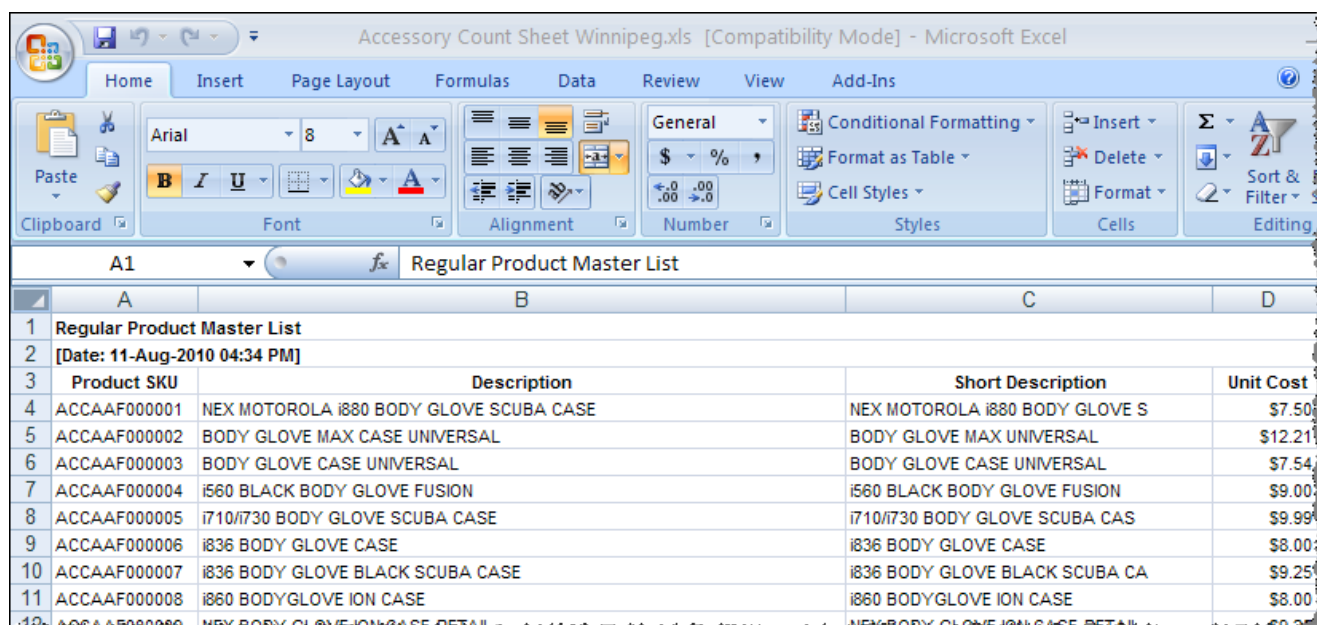
- Click **Run Report** to create the list of accessories.



- Click on the Excel icon to open the report in MS Excel. Save it to your computer as **Accessory Count Sheet LocationName** or something similar. This will be your Starting Count Sheet for accessories (non-serialized items.)

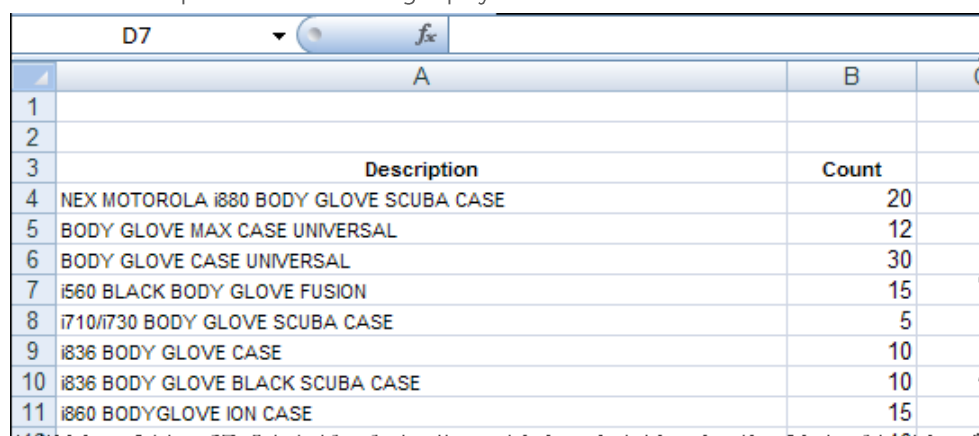


- To finish the count sheet, open **Accessory Count Sheet LocationName** in Excel.



- Delete all columns except **Description**. Add a new column header titled **Count**. (See below). This is your Starting Count Sheet for accessories. Fill out the **Count** column with the quantity

value of each product after doing a physical count of stock.



	A	B	C
1			
2			
3	Description	Count	
4	NEX MOTOROLA i880 BODY GLOVE SCUBA CASE	20	
5	BODY GLOVE MAX CASE UNIVERSAL	12	
6	BODY GLOVE CASE UNIVERSAL	30	
7	i560 BLACK BODY GLOVE FUSION	15	
8	i710/i730 BODY GLOVE SCUBA CASE	5	
9	i836 BODY GLOVE CASE	10	
10	i836 BODY GLOVE BLACK SCUBA CASE	10	
11	i860 BODYGLOVE ION CASE	15	

Figure 2: Starting Count Sheet for Accessories Example

- Repeat the previous steps for each location.

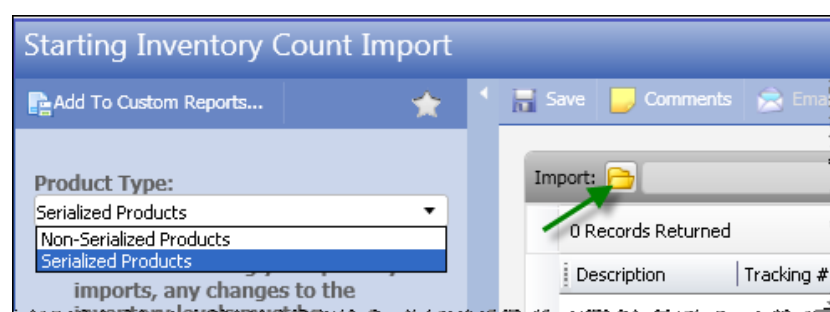
Step 2 – Import Count Sheets to RQ4

Use the following steps to import your completed Starting Count sheets into RQ4 using the **Starting Inventory Count Import** tool. The Phones and Accessories Starting Count sheets will be imported separately, one location at a time, as follows:

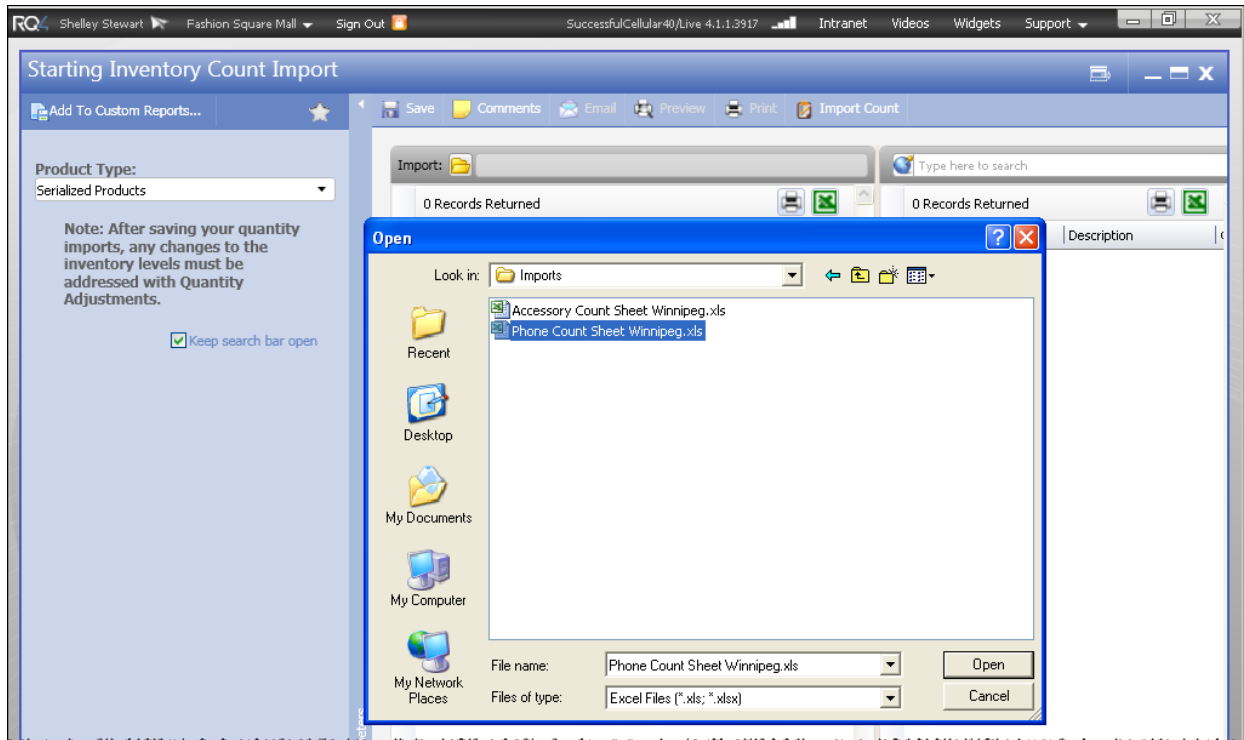
Serialized Inventory Count Sheet Upload

Use the following steps to import the Starting Count sheets for phones and other serialized items.

- In RQ4, go to **Reports** and search for the **Starting Inventory Count Import** tool. Double-click to display the Starting Inventory Count Import screen.
- From the **Product Type** drop-down list select **Serialized Products**.



- Click on the Import icon to navigate to the Phones Count Sheet created in the previous step.



4. The Get Excel Details screen will appear (see below). Fill in the text fields using the following guidelines:

Sheet Name: Defaults to 'Sheet1' (as in the example below) but should be changed to whatever the current sheet name is for the non-serialized items.

First Row: Enter row # of first item.

Last Row: Enter row # of last item.

Description Column: Enter letter of Description column.

Tracking # Column: Enter letter of tracking number (ESN or IMEI) column.

Quantity Column: Enter letter of Quantity column.

Vendor SKU Column: Enter letter of Vendor SKU column (Optional – don't use if already in product properties).

Manufacturer SKU Column: Enter letter of Manufacturer SKU column (Optional – don't use if already in product properties).

Warning: At this point you should double check your Count Sheet data. Any blanks or 0 values in the ESN column will cause an error in the next step. Also, do not change any value in the Description column. Changing the **Description** column values will prevent the import from succeeding.

Get Excel Details

Sheet Name: Sheet1

First Row:

Last Row:

Description Column:

Tracking # Column:

Vendor SKU Column (optional):

Manufacturer SKU Column (optional):

Cancel

Get Excel Details

Sheet Name: Sheet1

First Row: 4

Last Row: 11

Description Column: A

Tracking # Column: B

Vendor SKU Column (optional):

Manufacturer SKU Column (optional):

Cancel OK

Phone Count Sheet

Home Insert Page Layout Formulas Data Review View

Paste

Clipboard

Font

Alignment

Number

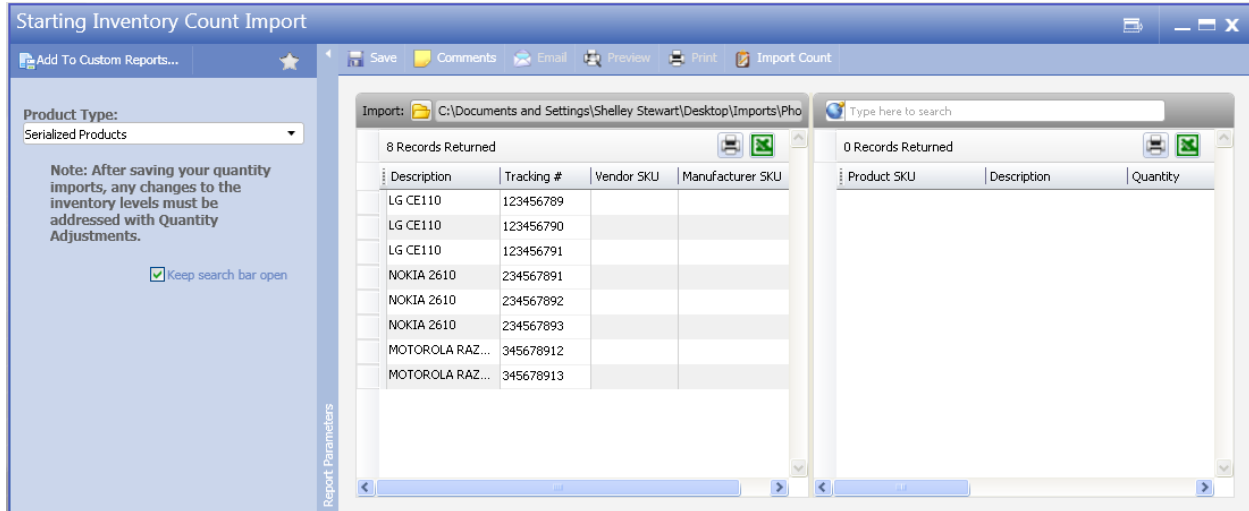
A12 xSAMSUNG ZX20

	A	B	C	D
1				
2				
3	Description	ESN		
4	LG CE110	123456789		
5	LG CE110	123456790		
6	LG CE110	123456791		
7	NOKIA 2610	234567891		
8	NOKIA 2610	234567892		
9	NOKIA 2610	234567893		
10	MOTOROLA RAZR2 V9	345678912		
11	MOTOROLA RAZR2 V9	345678913		

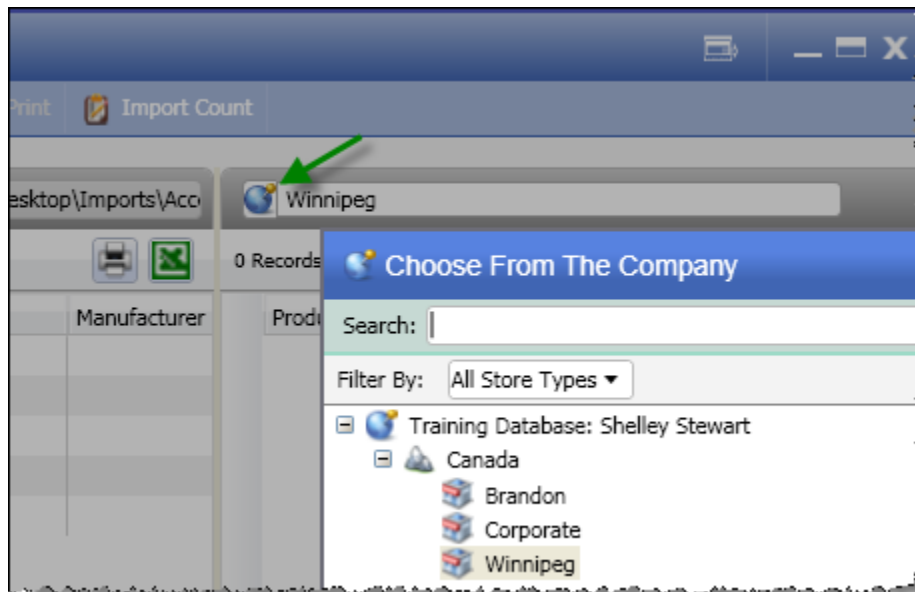
Sheet1

Ready Scroll Lock Average: 4567891234 Count:

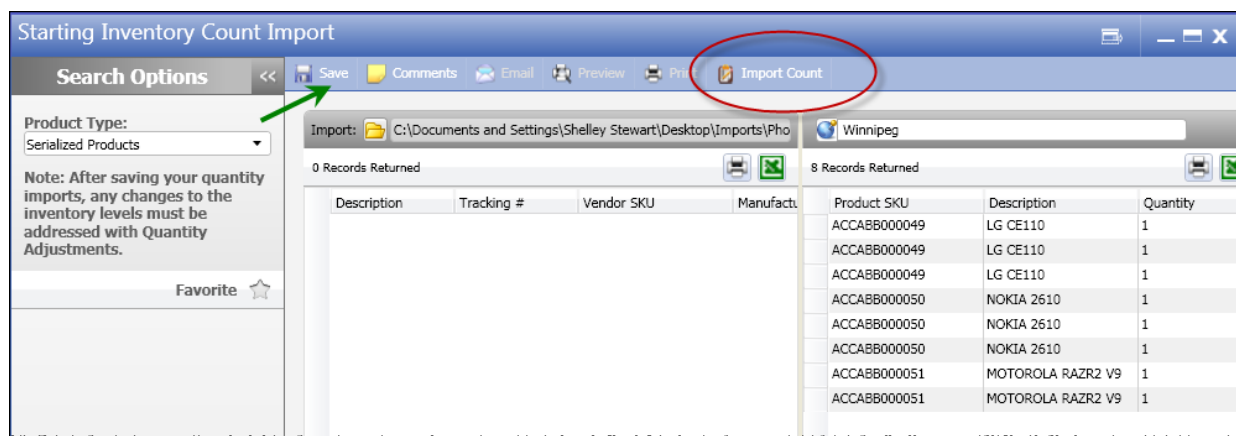
5. Click OK to begin the import.
6. The import items will be displayed in a data grid.



7. Select the location(s) to be imported to by clicking on the Location icon.



8. You are ready to import your count. Select the **Import Count** button on the top tool bar.
9. When the import is complete, the grid on the left side of the screen will be blank and the products should now be in the grid on the right side of the screen.



10. Click **Save** to complete the import.

11. Use the **Starting Inventory Count History Report** to refer back to this import.

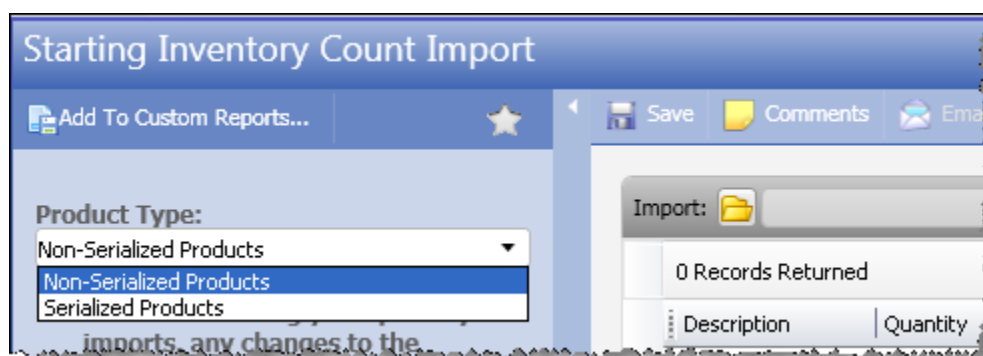
Note: The Starting Inventory Import can only be used during initial setup. *All future inventory counts should be entered using purchase orders or by using the Quantity Adjustment module.*

12. Repeat for each location.

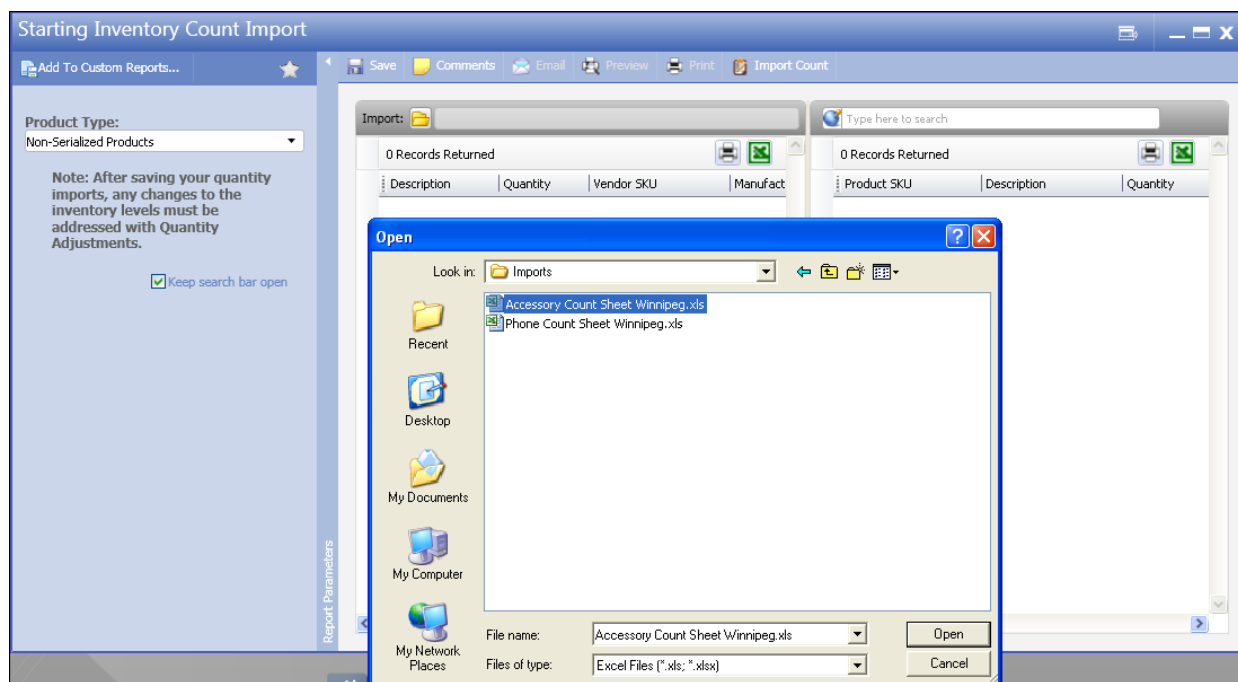
Non-Serialized Inventory Count Sheet Upload

Use the following steps to import the Starting Count sheets for accessories (all non-serialized products.)

1. In RQ4, go to **Reports** and search for the Starting Inventory Count Import tool. Double click to display the Starting Inventory Count Import screen.
2. From the **Product Type** drop-down list choose **Non-Serialized Products**.



3. Click on the **Import** icon to navigate to the Accessory Count Sheet created in the previous step.



4. The Get Excel Details screen will appear. Fill in the text fields using the following guidelines:

Sheet Name: Defaults to 'Sheet1' (as in the example below) but should be changed to whatever the current sheet name is for the non-serialized items.

First Row: Enter row # of first item.

Last Row: Enter row # of last item.

Description Column: Enter letter of Description column.

Quantity Column: Enter letter of Quantity column.

Vendor SKU Column: Enter letter of Vendor SKU column (Optional – don't use if already in product properties).

Manufacturer SKU Column: Enter letter of Manufacturer SKU column (Optional – don't use if already in product properties).

Warning: At this point you should double-check your Count Sheet data. Any blanks or 0 values in the ESN column will cause an error in the next step. Also, do not change any value in the Description column. Changing the **Description** column values will prevent the import from succeeding.

Get Excel Details

Sheet Name:

First Row:

Last Row:

Description Column:

Quantity Column:

Vendor SKU Column (optional):

Manufacturer SKU Column (optional):

Cancel

Get Excel Details

Sheet Name:

First Row:

Last Row:

Description Column:

Quantity Column:

Vendor SKU Column (optional):

Manufacturer SKU Column (optional):

Cancel

OK

Accessory

Home Insert Page Layout Formulas

Paste

Clipboard

Font

Alignment

Number

General

\$ % ,

0.00 .00

A15 f*x* i530 BODYGLOVE FUSION CASE

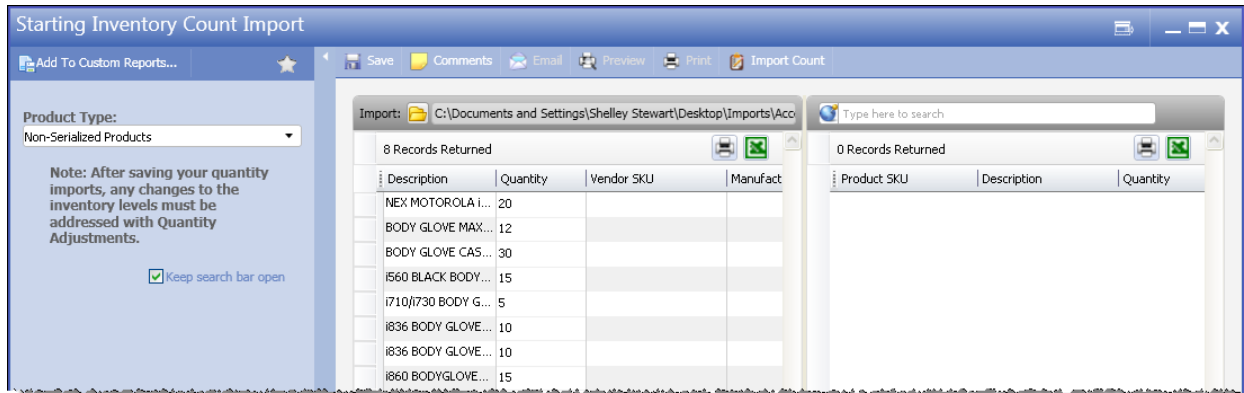
	A	B	C
1			
2			
3	Description	Count	
4	NEX MOTOROLA i880 BODY GLOVE SCUBA CASE	20	
5	BODY GLOVE MAX CASE UNIVERSAL	12	
6	BODY GLOVE CASE UNIVERSAL	30	
7	i560 BLACK BODY GLOVE FUSION	15	
8	i710/i730 BODY GLOVE SCUBA CASE	5	
9	i836 BODY GLOVE CASE	10	
10	i836 BODY GLOVE BLACK SCUBA CASE	10	
11	i860 BODYGLOVE ION CASE	15	

Sheet1

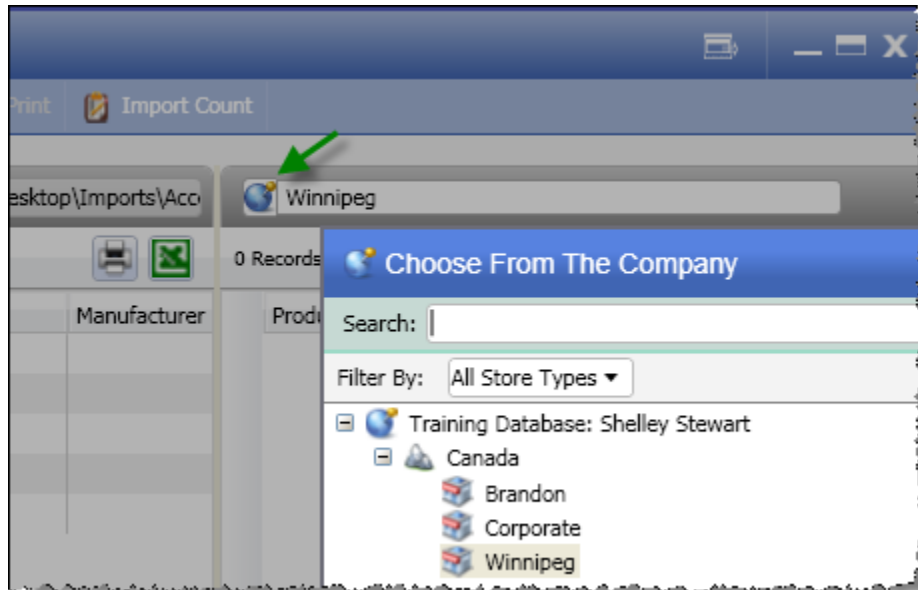
Ready Scroll Lock

- Click OK to begin the import.

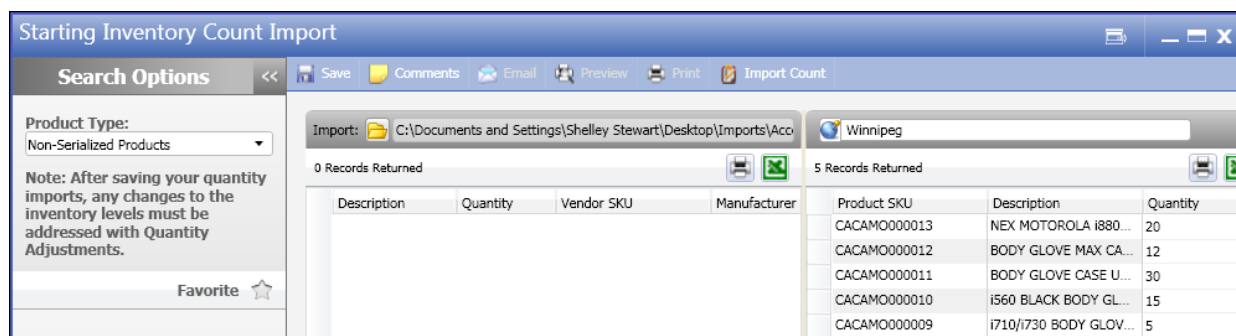
6. The uploaded items will be displayed in a data grid.



7. Select the location(s) to be imported to by clicking on the **Location** icon.



8. You are ready to import your count. Select the **Import Count** button on the top tool bar to begin the import.
9. When the import is complete, the grid on the left side of the screen will be blank and the products should now be in the grid on the right side of the screen.



10. Click **Save** to complete the import.
11. Use the **Starting Inventory Count History Report** to refer back to this import.
12. Repeat for each location.

NOTES:

- The Starting Inventory Import can only be used during initial setup. All future inventory counts should be managed using purchase orders or by using the Quantity Adjustment module highlighted at the end of this document.
- If you get stuck on this section and cannot access Support, use the Purchase Orders section that follows.

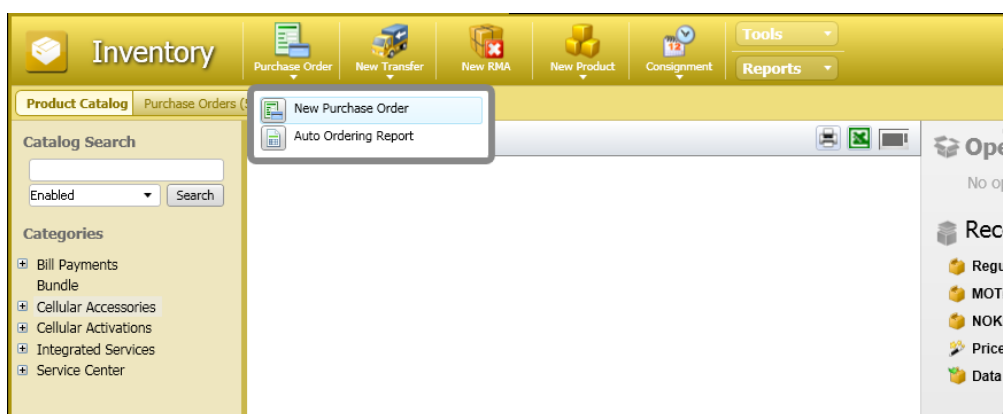
Starting Purchase Orders

If you are setting up a new store you may use Starting Purchase Orders to add your inventory quantities. Purchase orders must be created, committed and then received into each location.

Create and Commit Purchase Orders

Use the following steps to create and commit your purchase orders:


1. Go to **Inventory | Purchase Order | New Purchase Order**. The New Purchase Order screen will be displayed.



2. Select a vendor from the **Vendor** drop-down list. Select the **Receive At** and **Bill To** locations, **Shipping Method** and **ETA** (Estimated Time of Arrival - by default the ETA will be today + 5 days) from the corresponding drop-down lists.

The screenshot shows the 'New Purchase Order' window. The 'Vendor' dropdown is set to 'Test vendor'. The 'Receive At' location is 'Fashion Square Mall' and the 'Bill To' location is 'Corporate Office'. The 'Shipping Method' is 'Regular' and the 'ETA' is '08/17/2010'. The 'Estimated Cost' is '\$0.00'. The 'Drop ship to customer' checkbox is unchecked. Below the form is a table with columns: Product SKU, Description, Vendor SKU, Qty, Unit Cost (Exp), and Total Unit Cost. An 'Add' button is next to the table header.

Note: You must create a new purchase order for each vendor. Only products from the selected vendor will be available to add to the purchase order.

3. To select the products to be included, use one of the following options:
4. Click on the **Search** icon  to open the **Choose Product** screen and search for your products on the Inventory tree (see below).
5. Enter the Product SKU number in the product search field and click **Add**.
6. Use the barcode scanner to scan in the **Manufacturer Part Number**, **Vendor Part Number**, or **Barcode**. If you are printing your own labels, you may use the **RetailIQ Product SKU**.

New Purchase Order

Pending Committed Auto Order Report Comments Email Preview Print

Vendor: Test vendor

Receive At: Winnipeg

Bill To: Corporate Office

Drop ship to customer ☐

PO #:
Reference #: Starting Inventory 2010-08-12
Shipping Method: Regular
ETA: 08/17/2010
Estimated Cost: \$0.00

Choose Product For Purchase Order

body Search 4 matches for body

Product SKU	Description	Qty
ACCAAF000003	BODY GLOVE CASE UNIVERSAL (black)	10
ACCAMO000074	BODY GLOVE CASE UNIVERSAL (red)	0
ACCAAF000002	BODY GLOVE MAX CASE UNIVERSAL (black)	9
ACCAMO000075	BODY GLOVE MAX CASE UNIVERSAL (red)	0

Cancel Select All OK

- Enter the correct quantities to be received by clicking in the **Quantity** column beside each product.

New Purchase Order

Pending Committed Auto Order Report Comments Email Preview Print

Vendor: Test vendor

Receive At: Winnipeg

Bill To: Corporate Office

Drop ship to customer ☐

PO #:
Reference #: Starting Inventory 2010-08-12
Shipping Method: Regular
ETA: 08/17/2010
Estimated Cost: \$636.00

Product SKU	Description	Vendor SKU	Qty	Unit Cost (Exp)	Total Unit Cost
ACCAAF000003	BODY GLOVE CASE UNIVERSAL (black)		20	\$10.00	\$200.00
ACCAMO000074	BODY GLOVE CASE UNIVERSAL (red)		10	\$10.00	\$100.00
ACCAAF000002	BODY GLOVE MAX CASE UNIVERSAL (bla...		9	\$12.00	\$108.00
ACCAMO000075	BODY GLOVE MAX CASE UNIVERSAL (red)		19	\$12.00	\$228.00

- After all products are entered to your satisfaction, click the **Committed** button. This will save the purchase order, and provide you with a **PO #**.

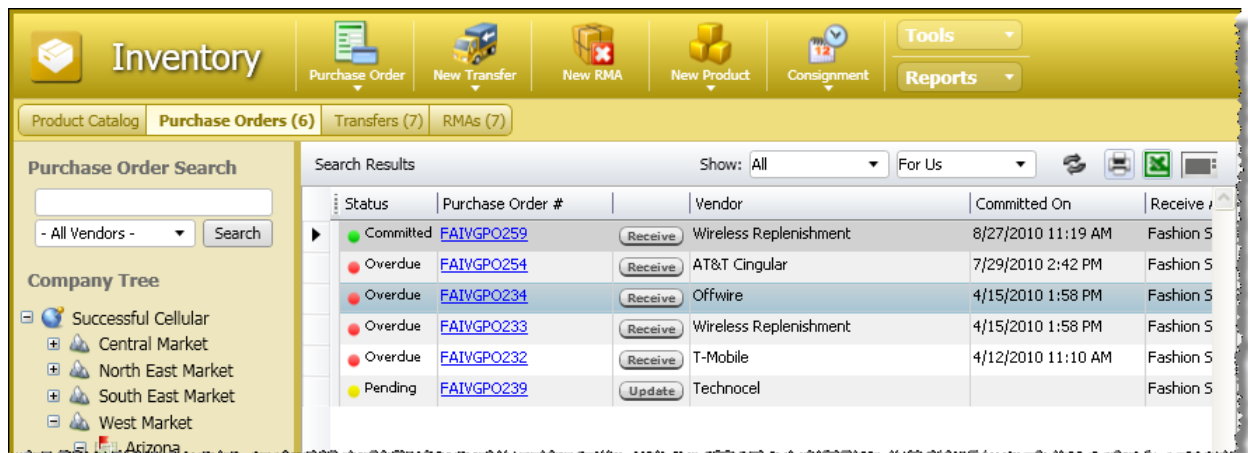
Note: If you choose not to **Commit** the purchase order, you may use the **Pending** button to save it for future updating. After the purchase order is committed, you can no longer make any changes to it unless you un-commit it in the Receive Purchase Order screen.

- Repeat this process for each vendor at each location, or receive all products into one location and use transfers to distribute it to multiple locations.

Receive Committed Purchase Orders

Use the following steps to 'receive' committed purchase orders into your inventory:

- From the main form, click on the **Inventory** icon and select the **Purchase Orders** tab.



- If necessary, select the correct search location from the **Company Tree** and select the correct vendor from the **Vendor** drop-down list to search for all committed purchase orders for your location. You must be logged into the location set as **Receiving At** location on the original purchase order.
- Click the **Receive** button on the purchase order you are receiving. The Receive Purchase Order Screen will be displayed.

Receive Purchase Order

Save Uncommit Email Preview Print Print Labels

Receiving Today Receiving Summary ☐ Completed

Ship To: Fashion Square Mall Vendor Invoice #: PO #: FAIVGPO259
 Vendor: Wireless Replenishment Receiving #: Reference #: Starting Purchase Order

Products Ordered 2 Records Returned Receive Receive All Comments

Product SKU	Description	Vendor SKU	Qty	Unit Cost	Total Cost
ACBAKY000017	Motorola battery		20	\$0.00	\$0.00
ACBAMO000007	OEM STANDARD BATTERY		20	\$25.00	\$500.00

Products Received Today Add

Product SKU	Description	Vendor SKU	Tracking #	Qty	Old Cost	Unit Cost	Total Cost	Print	Unit Price
-------------	-------------	------------	------------	-----	----------	-----------	------------	-------	------------

Subtotal: \$0.00
 Shipping: \$0.00
 Tax 1: N/A Amount: \$0.00
 Tax 2: N/A Amount: \$0.00
 Invoice Total: \$0.00

- The top pane of the purchase order contains the products waiting to be received.
- Move the products to be received to the bottom pane by highlighting each product in the top pane and clicking the **Receive** button, or select **Receive All** to select them all. The products to be received must be displayed in the Products Received Today grid (bottom pane.)

Receive Purchase Order

Save Uncommit Email Preview Print Print Labels

Receiving Today Receiving Summary ☐ Completed

Ship To: Fashion Square Mall Vendor Invoice #: PO #: FAIVGPO259
 Vendor: Wireless Replenishment Receiving #: Reference #: Starting Purchase Order

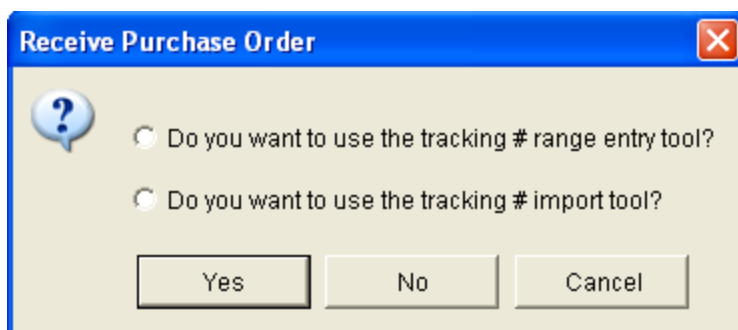
Products Ordered 2 Records Returned Receive Receive All Comments

Product SKU	Description	Vendor SKU	Qty	Unit Cost	Total Cost
ACBAKY000017	Motorola battery		20	\$0.00	\$0.00
ACBAMO000007	OEM STANDARD BATTERY		20	\$25.00	\$500.00

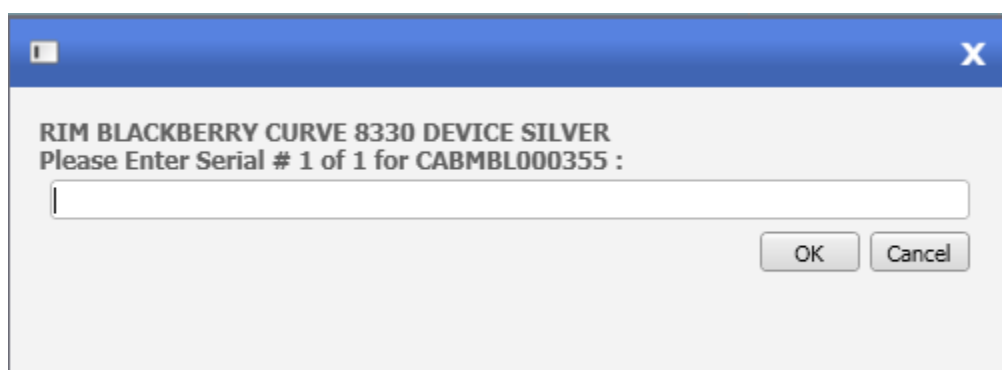
Products Received Today Add

Product SKU	Description	Vendor SKU	Tracking #	Qty	Old Cost	Unit Cost	Total Cost	Print	Unit Price
ACBAKY000017	Motorola battery			20	\$0.00	\$0.00	\$0.00	20	\$29.99
ACBAMO000007	OEM STANDARD BATTERY			20	\$25.00	\$25.00	\$500.00	20	\$59.99

- If you are receiving a phone or other serialized product, the following screen will be displayed.



7. Click no to proceed to the Tracking Number entry screen. Scan in your serial number (ESN or IMEI).



8. Repeat the previous steps until all products are at the bottom of the grid.
9. If the purchase order was completed at this time, select the **Completed** check box.
10. Fill in the following fields:

Vendor Invoice Number: On most vendor invoices, you will see an invoice number in the top corner. You will enter that number for future reference. If this is the first time you are receiving products into your system, enter 'Original Inventory' or something similar in this field for reference purposes.

Comments: optional

Tax 1: optional - If this is the first time you are receiving product into your system you will not need to enter a tax amount, because you already own the product. Normally you would enter the tax amount from the vendor invoice.

Tax 2: optional - If this is the first time you are receiving product into your system you will not need to enter a tax amount, because you already own the product. Normally you would enter the tax amount from the vendor invoice.

11. Press the **Save** button on the tool bar.

12. The **Print** screen will be displayed. Choose to **Print**, **Email**, **Print & Email**, or **Close** your receiving invoice.

Note: Received invoices in RQ4 can be viewed at any time in **Reports | Receiving Invoice History Report**.

13. Repeat these steps until you have received your entire inventory.

Inventory Quantity Adjustments

To make last minute updates to your inventory counts, you can use the Quantity Adjustment tool. For convenience sake, however, it is recommended that you use Purchase Orders for your regular inventory management.

Non-Serialized Item Adjustments

Use the following steps to update quantities of non-serialized products such as accessories.

1. Go to **Inventory | Tools | Quantity Adjustments**.
2. Choose the location from the **Adjusts At** field.
3. In the **Product** field, enter the product SKU to be adjusted, or use the icon to search for the correct product.

4. Click **Add**.

The screenshot shows the 'Inventory Quantity Adjustments' window. On the left, there are input fields for 'Inventory Adjustment #:', 'Adjust At' (set to 'Corporate'), 'Product' (set to 'CABAMO000001'), and 'Tracking #'. Below these is an 'Add' button with a green plus icon, which is circled in red. On the right, there is a table with columns 'Location', 'Product SKU', and 'Description'. Above the table are buttons for 'Save', 'Comments', 'Email', 'Preview', and 'Print'.

5. In the **Adjust** column, enter the quantity to be added or removed (use a negative quantity to decrease product quantity). The **New Quantity** field will adjust accordingly.

The screenshot shows the 'Inventory Quantity Adjustments' window with the table populated. The table has columns: 'Location', 'Description', 'In Stock', 'Adjust', 'New Quantity', 'Reason Code', and 'Tracking #'. The first row is highlighted, showing 'Corporate' as the location, 'Standard Battery X25' as the description, '106' as the in-stock quantity, '-10' as the adjustment, and '96' as the new quantity. The 'Add' button is still visible at the bottom left.

6. From the **Reason Code** column, select a reason for your adjustment (this is a required entry).
7. Click **Save**. Your product quantity is adjusted.

Serialized Item Adjustments

Use the following steps to update quantities of serialized products such as phones.

1. Go to **Inventory | Tools | Quantity Adjustments**.
2. Choose the location from the **Adjusts At** field.
3. In the **Product** field, enter the product SKU to be adjusted, or use the icon to search for the correct product.
4. In the **Tracking #** field, enter or scan the ESN or IMEI number of the phone (serialized product).
5. Click **Add**.

The screenshot shows the 'Inventory Quantity Adjustments' window. On the left, there are form fields: 'Inventory Adjustment #' (empty), 'Adjust At' (set to 'Corporate'), 'Product' (set to 'ACCABB000003'), and 'Tracking #' (set to '12345'). An 'Add' button with a green arrow is at the bottom of these fields. On the right, there is a table with columns: 'Location', 'Description', 'In Stock', 'Adjust', and 'New'. The 'Set' dropdown is set to 'Adjust' and the 'To' field is empty.

6. In the **Adjust** column, the quantity will be automatically adjusted according to your entry (i.e. if you entered a tracking number that is already in the system, RQ4 will assume this is a quantity removal and display -1).
7. From the **Reason Code** column, select a reason for your adjustment (this is a required entry).
8. Click **Save**. Your product quantity is adjusted.

The screenshot shows the 'Inventory Quantity Adjustments' window after saving. The form fields on the left are the same. The table on the right now has one row: 'Corporate' | 'Standard Battery X25' | '106' | '-10' | '96'. The 'Reason Code' column has a dropdown menu open, showing 'Inventory Count' selected. The 'Tracking #' column is also visible.

Procedures Review

During your Stage 5 training call you will also review the following procedures:

- Setting up workstations with printers, cash drawers, credit card swipers, etc.
- Complete setup of all Value Added Products that require client setup such as Merchant ID entries. This may include Payment Integration (credit card processing), Precash, Handset Protection, Flipswap, etc.
- Add any new product using **Inventory | New Product** or **Reports | Regular Product Import Wizard**. Any new phones must also be added with prices to the Price Sheet in **Inventory | Tools | Update Carrier Pricing Sheet**.
- Remove any obsolete product using **Inventory | Tools | Inventory Removal Tool** (Any phones that your remove must first be removed from the Carrier Pricing Sheet.)
- Ensure that you can cash in and out.

Support and Post launch Expectations

Success Team: Your CSM (Customer Success Manager) can be reached at 1.888.888.8170 – choose from the directory listings of available managers.

Launch Team: Your Launch team can be reached at setup@iQmetrix.com or call 1-888-888-8170 and choose extension 1.

Software Support: Direct general support questions to 1.888.888.8170 (Regular hours are Mon. – Fri. 7:00am to 6:00pm CST / 8:00am to 7:00pm EST).

Online Support & Training: Help files, training videos, and webinar (live training) registration are available at <http://support.Retailiq.com>. While logged into RQ4, Help files, training videos and Chat support are available from the **Support** menu.

Incident Manager: Report an issue by logging a report at <http://incidents.iqmetrix.com> or from the RQ4 Support Menu.

Extended Hours & Weekend Support: iQmetrix offers after-hours and weekend support in case of emergency. An emergency constitutes any issue that prevents the end user from operating their day to day business. Callers must leave a message with the help desk and will receive a response when a resolution has been reached.

CSM Check Point

At this point you should be contacted by your CSM who can help you with any concerns and issues going forward.

Going Live

Congratulations for completing the RQ4 setup! You are now ready to Go Live.