



Part IV Marketing

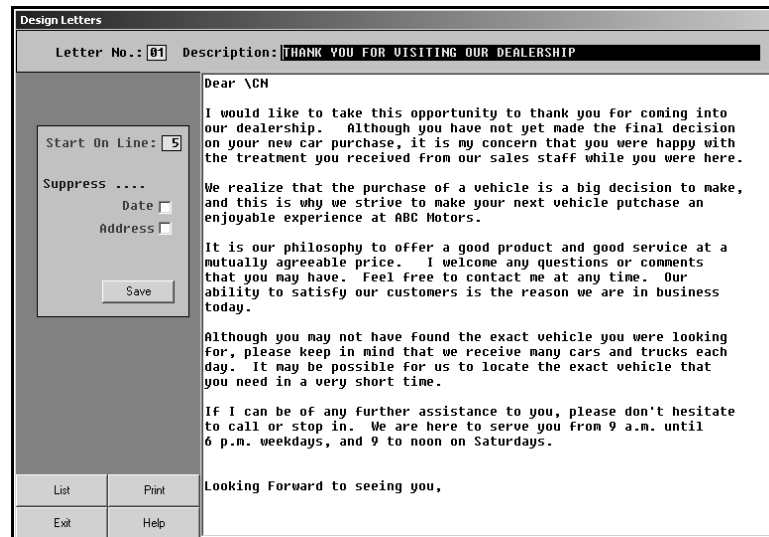
Chapter 27 Marketing Overview and Setup

The Marketing module helps you manage your marketing activities. You can use it to compile marketing lists and to print customer lists, mailing labels, and file cards. You can also use the menu to view a customer's service history.



Creating Customer Letters

When you click **Setup & Data Utilities**, the Setup /Customer Data Utilities menu opens. Before you begin using the Marketing module, you can use the **Compose Letters** button to create letters. You compose letters in the Showroom Traffic module the same way you do in the CSI & SSI module. Remember, all letters you create in CSI/SSI, Showroom Traffic, and Marketing are available in a common letter database. See "Creating a New Letter" on page 16 for instructions on creating letters.



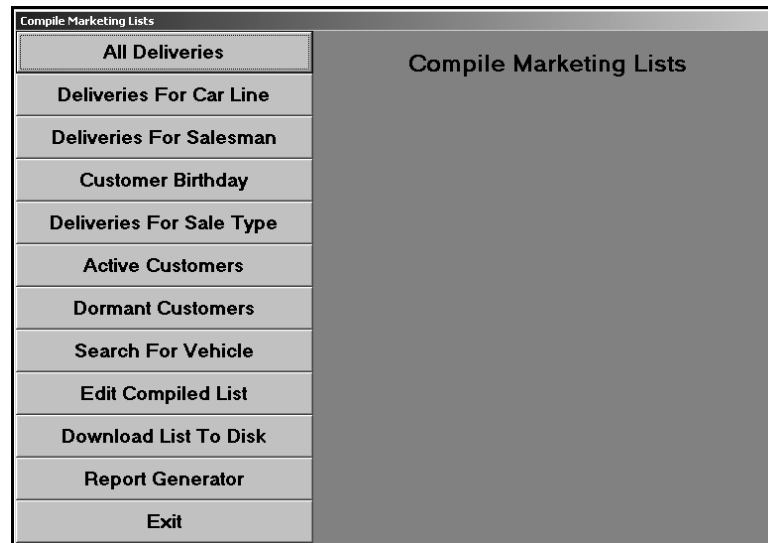
Viewing Customer History

The View Customer History button opens the Customer Information screen. You use this screen the same way you use the Customer Information screen in Desk Manager to view a customer's/vehicle's service history. Refer to chapter 17, "Customer History," on page 103 for instructions on using this screen.

Customer Information (ABC Motors)			
Customer Number:	SMI100095	Last 8:	4K100095
VIN:	1GNCT00X04K100095	Active/Inactive (A/I):	<input type="checkbox"/>
Name:	STEVE SMITH	Home:	724 555 1234
Name:	STEVE SMITH	Work:	724 555 9876
Address:	555 MAIN STREET		
City/State:	WEST MIDDLESEX PA	16159	
e-Mail:			
Salutation:	STEVE		
Memo:			
Birthdate:	05	19	60
Salesman:	02	STEPHEN WILLIAMS	
Cars Purch Here:	1		
Stock No:	4C009	Year:	2004
Color:	BLACK		
Delivered:	09	21	04
Car Line:	1	Make:	CHEVROLET
Keys:			
Odometer:			
New/Used/Other:	N	Model:	BLAZER
License:	QXK999		
In Service:	09	21	04
Lease/Purch/Finance:	F	Body:	2WD
Finance Term:	60	Monthly Payment:	354.92
Total Cash Price:	20051.90		
Last Service:	09	22	04
Next Service:	00	dd	00
Total Service Visits:	5		
Inspection Month:	05		
Service Contract:			
Term:	<input type="checkbox"/>	Expires:	<input type="checkbox"/>
If Multiple Vehicles For This Customer "Click" Car From List			
Exit	< Search Customers >	Print	Clear History Save

Chapter 28 Compile Marketing Lists

The **Compile Marketing Lists** button opens the Compile Marketing Lists menu. You use this menu to compile a list of customers based on specific criteria. Once you generate the list, you edit it as needed to ensure it includes the correct customers. You can then download the list to a disk if an outside company conducts marketing activities for your dealership, or you use the list to print marketing letters and mailing labels. (Chapter 29 covers printing documents using the compiled list).



The first eight buttons on the menu are your compiling options. Click the button that corresponds to the list you want to generate. The system prompts you to enter any additional criteria you can specify to generate the list. You can only use one option to generate the marketing list. When the system generates the list, it overwrites the last generated list.

When the system scans to compile the list, it scans all customer files and includes all customers that meet the criteria you specify. This includes any internals, dealer trades, etc. that have customer files in the customer database. Because of this, you should always edit the list to remove any customers you do not want to remain on the list. When you choose a “print all” option based on the compiled list, the system prints labels or letters for all customers on the list, including any internals, dealer trades, etc. you did not remove from the compiled list.

Tip: Federal law prohibits telemarketing of customers who you have not done business with in the last 18 months. Keep this in mind when specifying the dates you want to use for a marketing list you will use for telemarketing purposes.

All Deliveries

Use this button to compile a marketing list based on the vehicle type (new, used, other, or all) delivered to customers for a specific date range.

1. Click **All Deliveries**.
2. Indicate the type of vehicle you want to use to generate the list. Type **N** for new, **U** for used, **O** for other, or **A** for all.
3. Type the date ranges. You must enter the date in an eight-character format with or without slashes (mm/dd/yyyy or mmddyyyy). Press ENTER to continue if you do not use slashes.
4. Click **OK** when prompted to verify you want to compile the list.
5. When the system is finished compiling the list, it displays a message indicating the total number of files added to the list. Click **OK** to acknowledge the message.

Deliveries For Car Line

Use this button to generate a marketing list based on the vehicle sales from a specific car line for a specific date range. The car line is a number from 1-9. The car lines were created in the Accounting module.

1. Click **Deliveries For Car Line**.
2. Type the car line.
3. Type the date ranges. You must enter the date in an eight-character format with or without slashes (mm/dd/yyyy or mmddyyyy). Press ENTER to continue if you do not use slashes.
4. Click **OK** when prompted to verify you want to compile the list.
5. Click **OK** to acknowledge the number of records added to the list.

Deliveries For Salesman

Use this button to generate a list of vehicle sales for a specific salesperson for a specific date range.

1. Click **Deliveries For Salesman**.
2. Type the salesperson's number, or select the salesperson from the drop-down list.
3. Indicate the type of sale you want to use to generate the list. Type **N** for new, **U** for used, or **A** for all.
4. Type the date ranges. You must enter the date in an eight-character format with or without slashes (mm/dd/yyyy or mmddyyyy). Press ENTER to continue if you do not use slashes.
5. Click **OK** when prompted to verify you want to compile the list.
6. Click **OK** to acknowledge the number of records added to the list.

Customer Birthday

Use this button to generate a list based on the customers' birthday. The service writer should have entered the birthday on the Customer Information screen in the Service Writing module. The system only pulls customers with birthdays recorded in their files.

1. Click **Customer Birthday**.
2. Type the month and the range of days within the month you want to use to generate the list.
3. Click **OK** when prompted to verify you want to compile the list.
4. Click **OK** to acknowledge the number of records added to the list.

Deliveries For Sale Type

Use this button to generate a list of vehicle sales based on sale type (lease, purchase, finance) for a specific date range.

1. Click **Deliveries For Sale Type**.
2. Indicate the type of sale you want to use to generate the list. Type **L** for lease, **P** for purchase, or **F** for financed.
3. Type the date ranges. You must enter the date in an eight-character format with or without slashes (mm/dd/yyyy or mmdyyy). Press ENTER to continue if you do not use slashes.
4. Click **OK** when prompted to verify you want to compile the list.
5. Click **OK** to acknowledge the number of records added to the list.

Active Customers

Use this button to print a list of customers who came to the dealership for service within a specific number of months. If you want to print a list of customers due to come in for service, you can print the list from the Follow Up & Marketing menu in the Service Writing module.

1. Click **Active Customers**.
2. Type the number of months you want to use to generate the list.
3. Click **OK** when prompted to verify you want to compile the list.
4. Click **OK** to acknowledge the number of records added to the list.

Dormant Customers

Use this button to generate a list of customers that have *not* visited the dealership within a specific number of months. The system compiles the list based on the last service date. If there is no last service date, the system uses the delivery date.

1. Click **Dormant Customers**.
2. Type the number of months you want to use to generate the list.
3. Click **OK** when prompted to verify you want to compile the list.
4. Click **OK** to acknowledge the number of records added to the list.

Search For Vehicle

Use this button to generate a list of customers based on vehicle year, make, and/or model.

1. Click **Search For Vehicle**.
2. Type the year, make, and model you want to use to generate the list. If you leave a field blank, the system ignores the field during the search.
3. Click **OK** when prompted to verify you want to compile the list.
4. Click **OK** to acknowledge the number of records added to the list.

Edit Compiled List

Click **Edit Compiled List** to open the Edit Compiled List screen. You use this screen to review the compiled list, remove customers from the list, and edit customer information. The system saves any changes you make to a customer's information on this screen to the customer's master file in the Autosoft FLEX DMS system.

7RH37663	AMANDA KING	YOUNGSTOWN	OH 44505
RH376634	ROGER KINSER	WEST MIDDLESEX	PA 16159
RH476730	CHARLES WALKER	WEST MIDDLESEX	PA 16159
RH478676	THOMAS HILLER	YOUNGSTOWN	OH 44504
RH488997	DELLIA CHRISTOPHER	YOUNGSTOWN	OH 44505
RR624715	KENNETH R DILLING JR	WEST MIDDLESEX	PA 16159
S1428626	GRAHM STONE	YOUNGSTOWN	OH 44505
T9872322	MARY LEVINE	HERMITAGE	PA 16148
TK179550	LOUIS MOORE	YOUNGSTOWN	OH 44505
XG104565	PATRICIA ALBERT	WEST MIDDLESEX	PA 16159
YF300314	VIRGINIA NEWTON	YOUNGSTOWN	OH 44505
YF301186	RACHEL HARLEY	YOUNGSTOWN	OH 44505

Previous
Next

12 Total Records
Compiled

Active/Inactive (A/I)

Last 8:
 Name:
 Address:
 City/State/ZIP:
 Salutation:
 Phone:

Edits here are saved permanently to the Customer Master File.

Last 8 Sort
 Account Sort
 ZIP Sort
 Last Name Sort

Editing Customer Information

1. Click **Edit Compiled List**.
2. The screen displays the customers on the compiled list. The customers on the list are organized according to the last eight digits of the VIN. Click **Prev** and **Next** to advance to the previous and next pages of the list.
3. Use the sort options in the bottom right corner to sort the list based on the last eight characters of the VIN, the customers' account number, the customers' ZIP Code, or the customers' last name. Click the circle next to the sort option you want to select.
4. Click a customer in the list to view the customer's information.
5. Edit any information as needed. Remember, the system saves the changes to the customer's master file.
6. If you edit the **Active/Inactive** field, the edit is saved in the customer's file. Only customer flagged **A** for active will pull to the marketing list. If you change the status to **I** for inactive on this screen, the customer will be removed from the current marketing list, and the change will be saved to the customer's master file.
7. Make sure there is a name in the **Salutation** field. If this field is blank, no name will print for the customer name merge field (\CN) on letters you print for the customer.
8. If you edit any information, click **Save** to save the changes.

Removing Customers from the List

You should always edit the list to remove any customer you do not want on the list. Remember, the system may include internals or dealer trades that have customer files in the system, so you should edit the list to remove these "customers." Editing the list only removes customers from the current compiled list; this does not remove the customer records from the system. There are two ways to remove customers from the list. You can use the **Pre-Edit List** button or the **Remove Record** button.

Pre-Editing the List

The **Pre-Edit List** button allows you to view a list of all the customers on the compiled list. This option allows you to remove customers from the list without viewing their information. This only removes the customers from the current compiled list. It does not remove the customer records from the system.

1. Click **Pre-Edit List**.
2. Click **Previous** and **Next** to advance to the previous and next pages of the list.
3. Click the customer's name to remove the customer from the list. The customer's status changes from "Active" to "Remove." (Click the customer again to change the status back to "Active" if needed.) Continue to work your way through the list until you have removed all of the customers you do not want on the list.
4. Click **Back** to return to the edit screen. The customers you removed no longer appear in the list on this screen.

Removing Customers on the Edit screen

The **Remove Record** button allows you to remove customers on the list after viewing their information. This only removes the customers from the current compiled list. It does not remove the customer records from the system.

1. Click **Prev** and **Next** to advance to the previous and next pages of the list.
2. Click the customer's name, and the information fills in the fields on the bottom of the screen.
3. Click **Remove Record**.
4. Click **OK** when prompted to verify you want to delete the record. The system removes the customer from the list.

Download List To Disk

If a marketing company performs marketing activities for your dealership, you use this button to download the compiled list to a disk. You can download the list to a floppy disk (A drive) or the local hard drive (C drive). If you select to download the disk to a floppy disk, you are limited to the size of the floppy disk.

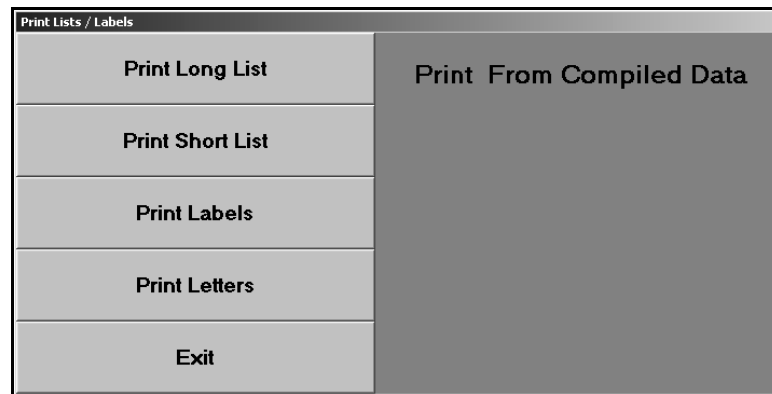
1. Click **Download List To Disk**.
2. When prompted to select the format, click **Flat ASCII** to save the list as an ASCII file or **Comma Delim** to save the file as a Comma Delimited file. (Comma Delimited is the format commonly required by vendors.)
3. When prompted to select a location for the download, click **A Drive** to download the file to a floppy disk or **C Drive** to download the file to the local hard drive. If you select to download the file to a floppy disk, make sure a formatted disk is in the disk drive.
4. Click **OK** when prompted to verify you want to download the file.
5. The system displays a "Did That" message when it is finished with the download. Click **OK** to acknowledge the message.

Report Generator

Use this button to open the report generator to create customer reports and lists. Please refer to your dealership's *Report Generator* manual. You can also view a complete online manual from the Report Generator. Click the Help icon (question mark) in the Report Generator, and click the "Download the complete Report Generator manual" link on any of the help screens.

Chapter 29 Print from Compiled List

Once you compile the marketing list, click **Print From Compiled List** on the Marketing menu. This opens the Print From Compiled Data menu. You use the options on this menu to print the compiled list and to print labels and letters for the customers on the list.



Print Long List

Use this button to print a detailed version of the compiled list. The long list displays the customer's name, the vehicle delivery date, model year, make, model, last eight characters of the VIN, last service date, next service date, description for the next service due, the customer's home and work telephone numbers, and the customer's salesperson.

1. Click **Print Long List**.
2. When prompted to verify your printer is ready, click to select **To Printer** to print the list or **To Screen** to view the list on your screen.
3. Once you select your print criteria, click **Print**.
4. If you select to print the information to your screen, you can print the report from the viewing screen by clicking **File** and **Print**. To exit the viewing screen, click **File** and **Exit**.

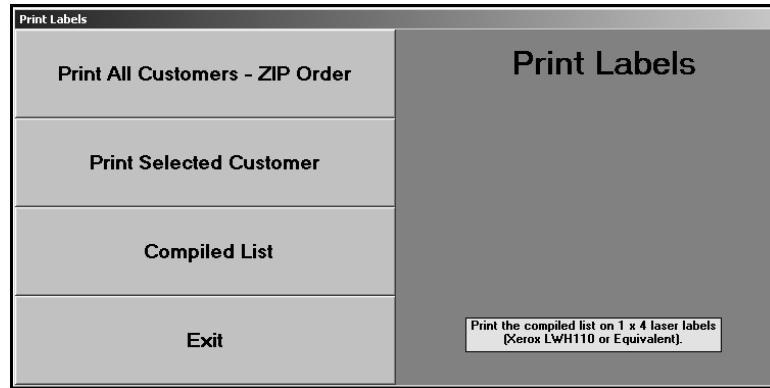
Print Short List

Use this button to print an abridged version of the compiled list. The short list displays the customer's name, address, and home telephone number.

1. Click **Print Short List**.
2. When prompted to verify your printer is ready, select your print criteria.

Print Labels

This button advances you to the Print Labels menu. You use this menu to print mailing labels for the customers on the compiled list. You must use 1x4 laser-compatible labels. You have the option of printing labels for all customers on the list or for a selected customer. Although you can select to print to screen to preview the labels, only print the labels from Autosoft FLEX DMS. This ensures your labels will print properly.



Print All Customers—Zip Code Order

Use this button to print labels for **all** the customers on the list. Remember, this includes any internals or dealer trades that may be on the list that you did not remove. The system sorts the customers by ZIP Code and prints the labels in ZIP Code order. You can select a customer on the list, and the labels will begin printing from the customer's ZIP Code.

Printing Labels for all Customers on the List

1. Click **Print All Customers-ZIP Order**.
2. Leave the **Starting With Zip** field blank, and press TAB or ENTER.
3. Click to select **To Printer**, and click **Print**.

Printing Labels Starting with a Selected Zip Code

1. Click **Print All Customers-ZIP Order**.
2. Click **Compiled List** when prompted to enter the ZIP Code you want to use as the starting point.
3. Click **Zip Sort** to sort the list by ZIP Code or **Cust Sort** to sort the list by the customers' last names.
4. Click the customer who you want to use as the starting point for the print job. The customer's ZIP Code is displayed on the screen. Press the TAB or ENTER key.
5. Click to select **To Printer**, and click **Print**.

Print Selected Customer

Use this button to print a label for a specific customer.

- 1. Click **Print Selected Customer**.
- 2. Click **Compiled List** when prompted to select a customer.
- 3. Click **Zip Sort** to sort the list by ZIP Code or **Cust Sort** to sort the list by the customers' last names.
- 4. Click the customer you want to select, and press TAB or ENTER.
- 5. Click to select **To Printer**, and click **Print**.

Compiled List

In addition to selecting customers when printing labels, you can use the **Compiled List** button to view the list as needed. Click **Zip Sort** to sort the list by ZIP Code or **Cust Sort** to sort the list by the customers' last names. Click **Exit** to return to the Print Labels menu.

Print Letters

This button advances you to the Print Letters menu. You use this menu to print letters for customers on the compiled list. When printing letters, you must specify the letter you want to print. Once you select the letter, the system prompts you to enter the signature and title that should print on the letter. Your letter must contain merge fields for the sender's name (\SG) and title (Tl) for on the signature line, or the system will not pull the information you enter.



Edit Compiled List

Before you print the letters, you can use the **Edit Compiled List** button to edit the compiled list. You can edit customer information, mark which customers you want to receive letters, and remove customers from the list. By default, all customers on the compiled list are flagged not receive a letter. You must edit the list to mark the customers you want to receive a letter.

The screenshot shows the 'Edit Compiled List' window. On the left side, there is a form with the following fields:

- Account:
- Name:
- Address:
- City:
- Salutation:

Below the form are three buttons: **OK**, **NO**, and **Remove**. At the bottom of the window are four buttons: **Back**, **Set All Records**, **Prev**, and **Next**. On the right side, there is a list of customers:

Account Number	Customer Name	Status
ALB104565	PATRICIA ALBERT	Letter
CHR480397	DELLIA CHRISTOPHER	Letter
DIL624715	KENNETH R DILLING JR	No
HAR301186	RACHEL HARLEY	Letter
KIN376634	ROGER KINSEY	No
KIN37663	AMANDA KING	No
LEU872322	MARY LEVINE	No
MIL478676	THOMAS MILLER	No
MOO179550	LOUIS MOORE	No
NEW300314	VIRGINIA NEWTON	No
STO428626	GRAHAM STOWE	No
VAL476730	CHARLES WALKER	No

1. Click **Edit Compiled List**.
2. The window on the right side of the screen displays the list of customers (organized according to the customer account number). The information for the first customer on the list automatically fills in the fields on the left side of the screen. You can also select individual customers by entering the account number or by clicking the customer in the list on the right side of the screen. (Use the **Prev** and **Next** buttons to scroll through the customer list.) The selected customer's information fills in on the screen.
3. Verify the customer's information. You can edit a customer's information on this screen, but the changes will not update to the customer's master file. The edits only affect how the information prints on the letters. If you need to permanently edit the information, you must edit it in the customer's master file.
4. Verify a name appears in the **Salutation** field. Type a name if one does not fill in this field. If this field is blank, no name will print for the customer name merge code (\CN) on the letter.
5. Click one of the three buttons to select the action you want to take:
 - Click **OK** to flag the customer to receive a letter. Customers flagged to receive letters have a status of "Letter."
 - Click **NO** to flag the customer not to receive a letter. Customers flagged not to receive letters have a status of "No."
 - Click **Remove** to remove the customer from the list.

Tip: If you want to set the whole list to the same status, you can click **Set All Records**. Click **Send Letter** to set all records to receive a letter or **No Letter** to set all records not to receive a letter.

6. As you click the buttons, the screen automatically displays the next customer's information. Continue to work your way through the list.
7. The system will prompt you with a "That's All" message when you have finished editing the entire list. Click **OK** to acknowledge the message.

Compiled List

The **Compiled List** button displays the current compiled list. For each customer on the list, it displays the customer's account number and vehicle's model year, make, and model name. You can use this list to select customers when you are printing letters.

1. Click **Compiled List** when prompted to select the customer you want to use as the starting point for the print job or to select the customer for the letter.
2. Click the customer you want to select. The **Account** field displays the customer's account number for your reference.

Master List

For the most part, this button only serves to select customers from the master customer database so you can print a letter for that customer. When you search for a customer, the master list, like the compiled list, displays the customer's account number and vehicle's model year, make, and model name. Because it displays such limited information, it may not serve as a good reference when inquiring about a customer in the master customer database. Use the **View Customer History** button on the Marketing menu to view the detail in a customer's master file.

1. Click **Master List** when prompted to select a customer for the letter.
2. Type the first three letters of the customer's last name. The system will take you to the first customer on the list whose name begins with the letters you entered.
3. Click the customer you want to select. The **Account** field displays the customer's account number for your reference.

Print Letters For Edited Records Only

Use this button to print letters for the edited records starting with a specific account. This only prints letters for customers whom you flagged to receive a letter on the Edit Compiled List screen.

1. Click **Print Letters For Edited Records Only**.
2. When prompted to select a customer as the starting point, click **Compiled List** to select the customer.
3. Type the letter number, or select the letter from the drop-down list. The name of the letter is displayed for your reference.
4. Type the signature and title as needed.
5. When prompted to verify your printer is ready, select your print criteria.

Print Letters for All Records

Use this button to print letters for all of the customers on the compiled list starting with a specific customer.

1. Click **Print Letters For All Records**.
2. When prompted to select a customer as the starting point, click **Compiled List** to select the customer.
3. Type the letter number, or select the letter from the drop-down list. The name of the letter is displayed for your reference.
4. Type the signature and title as needed.
5. When prompted to verify your printer is ready, select your print criteria.

Print Letters For One Account

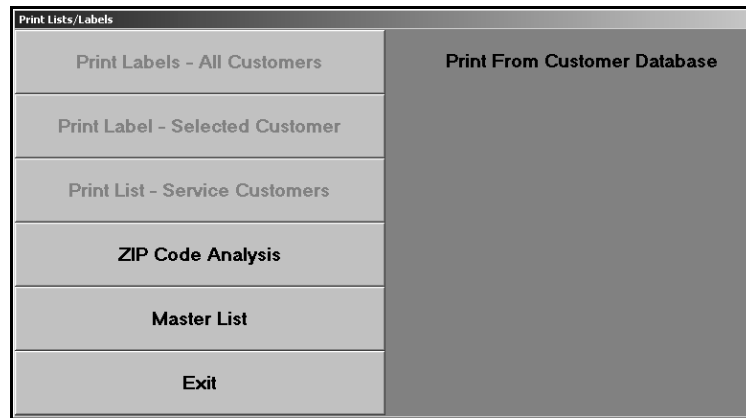
Use this button to print a letter for a specific customer.

1. Click **Print Letters For One Account**.
2. When prompted to select a customer as the starting point, click **Compiled List** to print a letter for a customer on the compiled list or **Master List** to print a letter for a customer from the master customer database.
3. Type the letter number, or select the letter from the drop-down list. The name of the letter is displayed for your reference.
4. Type the signature and title as needed.
5. When prompted to verify your printer is ready, select your print criteria.

Chapter 30 Print Customer Lists/Labels

In addition to printing lists and labels for customers on the compiled marketing list, you can print lists and labels for customers in the master customer database. Click **Print Customer Lists/Labels** on the Marketing menu to open the Print From Customer Database menu. The “All” options on this menu will print every customer who has a file in the system’s customer database, including internals, dealer trades, etc.

One option you have is to use the Report Generator to compile a customer list from the Service Writing module. Then, export the list to Microsoft® Excel. The list will help you identify any customer files for internals, dealer trades, etc. It will also help you identify customers whose files are missing information or customers with multiple customer files in the database. (You can use the list to delete duplicate customer files as needed.) You should edit the list in Microsoft Excel before saving or printing it. You would then use the list to print labels from another program (Microsoft Word, etc.). You cannot use the edited list in the Autosoft FLEX DMS system.



Print Labels—All Customers

This option is currently unavailable.

Print Label—Selected Customer

This option is currently unavailable.

Print List—Service Customers

This option is currently unavailable.

Print ZIP Code Analysis

Use this button to print a ZIP Code analysis for sales within a specific date range. The printout lists all of the ZIP Codes found in the system. For each ZIP Code, it lists the city, the number of customers who have the ZIP Code, and the percentage of the customer base these customers make up. The end of the printout lists the total number of customers and the total number of ZIP Codes.

1. Click **Print ZIP Code Analysis**.
2. When prompted, indicate the vehicle type you want to use to generate the list. Type **N** for new, **U** for used, or **A** for all.
3. Type the date range for the sales. You must enter the date as eight characters with or without slashes (mm/dd/yyyy or mmdyyy). Press ENTER if you do not use slashes.
4. When prompted to verify your printer is ready, click to select **To Printer** to print the information or **To Screen** to view the information on your screen.
5. Once you select your print type, click **Print**.

Master List

You can use this button to bring up the Search Customer Base screen to search for a customer in the master customer database. You can currently only use this option to view a list of customers.

1. Click **Master List** when prompted to select a customer.
2. Type the first three letters of the customer's last name or the last four digits of the customer's phone number. The screen displays a list of customers who meet the criteria you entered.
3. Click **Abort** to close the screen.

Chapter 31 Print File Cards/Postcards

In addition to printing lists and labels for customers in the master customer database, you can print service file cards and service folder labels, too. All of the label options require 1"x4" laser labels. Click **Print File Cards/Postcards** on the Marketing menu to open the Print Labels/File Cards menu. The **Master List** button on this menu works the same way it does on the Print From Customer Database menu when you are printing lists and labels.



Print Labels All Customers

Use this button to print service file labels for **all** customers (including any internals, dealer trades, etc.) with customer files in the system. In addition to the customer's name, address, and phone number, each label lists the VIN and delivery date for the customer's vehicle.

1. Click **Print Labels All Customers**.
2. The system indicates the total number of labels to be printed and the total number of sheets that will print.
3. Click to specify the sort order you want to use for the labels. Click **Name Sort** to print the labels by customers' last name, or click **Last 8 Sort** to print the labels according to the last eight digits of the VIN.
4. When prompted to verify your printer is ready, select your print criteria.

Print Card For Selected Customer

Use this button to print a “service file card” for a specific customer. The information prints on an 8.5”x11” sheet of paper that you can cut and attach to the service folder. The service file card lists the customer’s account number, name, address, phone number, salesperson, and service contract. It also lists the vehicle’s model year, make, model, type (new or used), delivery date, in-service date, VIN, and key codes.

1. Click **Print Card For Selected Customer**.
2. When prompted to specify the customer, click **Master List** to select the customer.
3. Type the first three letters of the customer’s last name or the last four digits of the customer’s phone number. A list of customers who meet the criteria you entered is displayed. Click the customer you want to select.
4. When prompted to verify your printer is ready, select your print criteria.

Print Label For Selected Customer

Use this button to print a mailing label for a specific customer.

1. Click **Print Label For Selected Customer**.
2. When prompted to specify the customer, click **Master List** to select the customer.
3. Type the first three letters of the customer’s last name or the last four digits of the customer’s phone number. A list of customers who meet the criteria you entered is displayed. Click the customer you want to select.
4. When prompted to verify your printer is ready, select your print criteria.

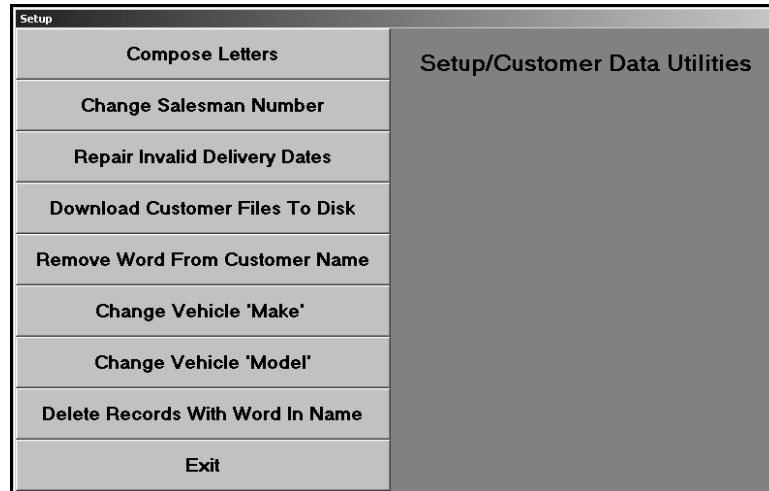
Address Envelope/Postcard

Use this button to print a customer’s name and address on an envelope. This option prints one envelope for the selected customer.

1. Click **Address Envelope/Postcard**.
2. When prompted to specify the customer, click **Master List** to select the customer.
3. Type the first three letters of the customer’s last name or the last four digits of the customer’s phone number. A list of customers who meet the criteria you entered is displayed. Click the customer you want to select.
4. When prompted to verify your printer is ready, select your print criteria.

Chapter 32 Data Utilities

The Marketing module has utilities you can use to manage your marketing files. You access these utilities by clicking **Setup & Data Utilities** on the Marketing menu, which opens the Setup/Customer Data Utilities menu. You already used the **Compose Letters** button to create customer letters. The remaining buttons display the utilities. To use a utility, click the button that corresponds to the utility you want to use, and follow the prompts on your screen.



Important: Since the utilities affect the files in the master customer database, make sure you know exactly what each utility does before you use it. If you are unsure of how a utility will affect the files, call the Autosoft Support Desk at (800) 473-4630 for assistance.

Change Salesman Number

This utility allows you to change the salesperson's number in the customer files to a new salesperson's number. You would use this utility, for example, if your dealership lost a salesperson and wants to make another salesperson responsible for the old salesperson's clients.

1. Click **Change Salesman Number**.
2. In **From Salesman**, type the original salesperson's ID number, or select the salesperson from the drop-down list.
3. In **To Salesman**, type the new salesperson's number, or select the salesperson from the drop-down list.
4. Click **OK** when prompted to verify you want to execute the change.
5. The system scans the files. This may take several minutes. When the system is finished scanning, it displays a message indicating the total number of files it changed. Click **OK** to acknowledge the message.

Repair Invalid Delivery Dates

Use this utility to repair any invalid delivery dates. The system scans the customer records and replaces any blank or corrupted delivery dates with the date "01/01/90."

1. Click **Repair Invalid Delivery Dates**.
2. Click **OK** when prompted to verify you want to execute the change.
3. The system scans the files. This may take several minutes.
4. When it is finished, it displays a message indicating the total number of files scanned. Click **OK** to acknowledge the message.

Once you run this utility, you can print a list of customers who have the replacement delivery date from the Compile Marketing Lists menu.

1. Click **Exit** on the Setup/Customer Data Utilities menu to return to the Marketing main menu.
2. Click **Compile Marketing List**.
3. Click **All Deliveries**.
4. Type **A** to include all deliveries.
5. Type **01/01/1990** for both the beginning and ending dates for the search. The system will add all of the customers with the generic 01/01/1990 date to the list.
6. Click **OK** to compile the list. The system scans the files. This may take several minutes.
7. Click **OK** when the system prompts you with the number of customers on the compiled list.
8. Click **Exit** close the compile menu.
9. Click **Print From Compiled List**.
10. Click **Print Long List** or **Print Short List**. Both lists provide the customer's name and phone number, which you can use to search for the customer's file; however, the long list includes the last eight digits of the VIN, which you can also use to recall customers' files.
11. Select your print criteria.
12. Use the list to edit the customer files as needed. You can edit the delivery dates using the **View Customer History** button on the Marketing menu.

Download Customer Files To Disk

This utility allows you to download customer files to a disk. This *is not* the same option available on the Compile Marketing List menu. Downloading on that menu only downloads the customers from the compiled marketing list. This utility downloads *all* of the customer files in the customer database. Since you can only download the files to a floppy disk and are limited to the space on the disk, you may not be able to use this utility unless you are a small dealership with a small customer database.

1. Click **Download Customer Files To Disk**.
2. When prompted to select the format, type **F** for flat ASCII or **C** for comma delimited file. (Comma delimited is the format commonly required by vendors.)
3. Verify there is a formatted disk in drive A, and click **OK**.
4. Click **OK** when prompted to verify you want to execute the download.

Remove Word From Customer Name

Use this utility to remove an unwanted word or string of characters from the **Name** field in the customer files.

1. Click **Remove Word From Customer Name**.
2. Type the text you want to remove, and press TAB or ENTER.
3. Click **OK** when prompted to verify you want to execute the change.
4. The system scans the files. This may take several minutes. When the system is finished scanning, it displays a message indicating the total number of files it changed. Click **OK** to acknowledge the message.

Change Vehicle 'Make'

This utility allows you to change the make of a vehicle in the customer files. This is useful to correct spelling errors.

1. Click **Change Vehicle 'Make.'**
2. Type the original make and the new make.
3. Press TAB or ENTER to continue as needed.
4. Click **OK** when prompted to verify you want to execute the change.
5. The system scans the files. This may take several minutes. When the system is finished scanning, it displays a message indicating the total number of files it changed. Click **OK** to acknowledge the message.

Change Vehicle 'Model'

Use this utility to change the model of a vehicle in the customer files. This is useful to correct spelling errors.

1. Click Change **Vehicle 'Model'**.
2. Type the original model and the new model.
3. Press TAB or ENTER to continue as needed.
4. Click **OK** when prompted to verify you want to execute the change.
5. The system scans the files. This may take several minutes. When the system is finished scanning, it displays a message indicating the total number of files it changed. Click **OK** to acknowledge the message.

Delete Records With Word In Name

This utility allows you to find all the files that contain a specific word in the Name field. The system displays a list of files that meet your search criteria, and you can select which files you want to delete. This is useful when you need to delete dealer trades or wholesale sales that were processed incorrectly.

1. Click **Delete Records With Word In Name**.
2. Type the word, and press TAB or ENTER.
3. Click **OK** when prompted to verify you want to execute the search.
4. The system scans the files. When it is finished, it displays a message indicating the total number of files that meet the criteria you entered. Click **OK** to acknowledge the message.
5. The screen displays a list of the records. Use the checkbox next to each record to indicate if you want to include or exclude a record from the list of records you want to delete. Click to select a box. Click a selected box to clear it. A checkmark indicates the record will be deleted, and an empty box indicates you want to keep the record.
6. When you are ready, click **Remove Selected Records** (or click **Cancel** to close the list without taking any action).
7. Click **OK** when prompted to verify you want to delete the records.
8. The system displays a message indicating it deleted the records. Click **OK** to acknowledge the message.