

The Autosoft FLEX DMS Backup Utility is an essential tool in protecting your dealership against data loss and recovering from any system failure, no matter the circumstance. It's important to back up your FLEX DMS data on a regular basis.

While backing up your data can be time consuming, it is far simpler and speedier than recreating many days' records following a loss of data. Regularly backing up your FLEX DMS data will ultimately cut down on the time required for recovery. For that reason, Autosoft recommends as best practice backing up your FLEX DMS nightly, monthly, and yearly.

Important: It is crucial that you save each daily update to a separate thumb drive or disc rather than overwriting the data nightly. This will prevent the need for you to manually re-enter multiple days' data following the restoration process. If you have not backed up in days or weeks, you will have to do a significant amount of work to re-enter the lost data.

Use the following checklists to ensure that your restoration is well-managed and complete.

Accounting

Before restoring from backup:

- Print all available journal data
- Print Payable/Receivable Schedules
- Print Inventory Schedule for all accounts
- Print any post-aheads
- In Cashier, print the daily summary and list

After restoring from backup:

- Check for available prior month history (General Ledger detail, FaStatement for Payables/Receivables, Vehicle Inventory, Detail/Balance Forward Schedules)
- Run system check
- Check General Ledger detail to make sure correct data was pulled

Service

Before restoring from backup:

- Print all repair orders from the date of the backup
- Print all new customers entered via the Customer Information screen on the date of the backup
- Print any new Setups (discounts, sublets, and menus) established in Service on the date of the backup

After restoring from backup:

- Recreate all repair orders from the date of the backup
 - When recreating an RO, the number must be changed back and old business entered from the hard/soft copies of the ROs
 - The RO numbers will start from the time of the backup
 - Once all old business is entered completely, set the number sequence for the next new RO you create.
- If new business must be entered, the RO number from the last RO created prior to the restore point must be changed in the Accounting Document number module.
 - Old and new business cannot be entered at the same time, as the RO sequence must be followed.
- Enter new business
- Re-enter any new customers entered in the Customer Information screen. However, if the customer was created by opening a new RO, nothing needs to be done other than making the RO again.
- Recreate any new Setups (discounts, sublets, and menus) in Service.

Parts

Before restoring from backup:

- Print all counter slips from the date of the backup
- Print all orders received prior to the restore date

After restoring from backup:

- Re-enter all counter slips from the point the restore was performed
 - Refer to the numbering system outlined in the Service section earlier in this document.
 - Change the document numbers in Accounting and enter old business.
- Enter new business by locating the last slip number generated prior to the restore and resetting it in Accounting
- Re-enter in Resupply and Returns all orders received prior to the restore, as well as any parts orders created to order parts
- Re-enter parts for all repair orders (refer to the ROs Service used to recreate the ROs)