



**Autosoft**  
**FLEX™**  
**DMS**  
*Report Generator*



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## Introduction Autosoft Report Generator

The Autosoft Report Generator is used to create user-defined reports. This allows you to pull the information you want from your Autosoft DMS system. Once you generate a report, you can save the settings and use the report to pull information in the future.

**Tip:** When you are building an inventory report from the Desk Manager or Accounting modules in the Report Generator, re-sort the Car Sheets in Desk Manager first to ensure you are retrieving the most current data.

## Opening the Report Generator

You can open the Report Generator from inside Autosoft DMS or from the Microsoft® Windows® Start menu.

### Opening the Report Generator from Inside Autosoft DMS

You can open the Report Generator from inside the Autosoft DMS system from the Parts Inventory program or the Marketing program.

- In Parts Inventory, click the **Report Generator** button on the Inventory Reports menu.
- In the Marketing program, click the **Report Generator** button on the Compile Marketing Lists menu.

### Opening the Report Generator from the Microsoft Windows Start Menu

1. Click **Start**.
2. Point to **Programs**.
3. Point to **Autosoft Applications**.
4. Click **ASI Report Generator**. The Report Generator opens.

**Tip:** If you cannot find Autosoft Applications, then you may need to click **Start**, point to **Programs**, and look at the bottom of the Programs Menu for a set of double arrows. Click the arrows to reveal the remaining items of the Programs Menu.

## Passwords in the Report Generator

The passwords entered in the Autosoft DMS system apply to the Report Generator, too. If you select a report for a module in the Autosoft DMS program that has a password, you are prompted to enter the password. For example, if a password is set for the Parts Inventory module in the program and you select Parts on the Select Department screen, the Report Generator prompts you for the Parts password. You cannot continue without entering the password.

This is also true for the passwords set for each individual menu option in each module. For example, if there is a password set for the Master Inventory screen and you select to generate an inventory source report, you are prompted to enter the password for the Master Inventory screen. You cannot generate the report without entering the password.

## Getting Ready

You need to understand a few things about the Report Generator before you build reports. The Report Generator only pulls data from the following modules: Accounting for vehicle inventory, Service for customer and technician data, Parts for parts inventory, and Desk Manager for vehicle inventory. The selection of fields per module is not exhaustive. Not every field of information from ASI DMS is available to pull via the Report Generator, and there is no financial data available through the Accounting option in the Report Generator.

If a displayed report in the Report Viewer does not display all the data selected in the Report Generator, then not all of the data will fit in the Viewer for display. There is only so much data that can fit on a letter or legal-sized sheet of paper. Excel has more options for scaling data to fit on different paper sizes. If data is omitted in specific fields, then the data simply is not there for that record in ASI DMS.

You can export data from the Report Generator to Microsoft® Excel, but in order to be able to do this, you will have to be at a workstation that has Excel installed on it. Once the data has been exported to Excel, you can use it to create mailing labels and customer letters using the mail merge option in Microsoft Word. Appendices F, G, and H provide instructions for using the data generated in the Report Generator in mail merge documents.

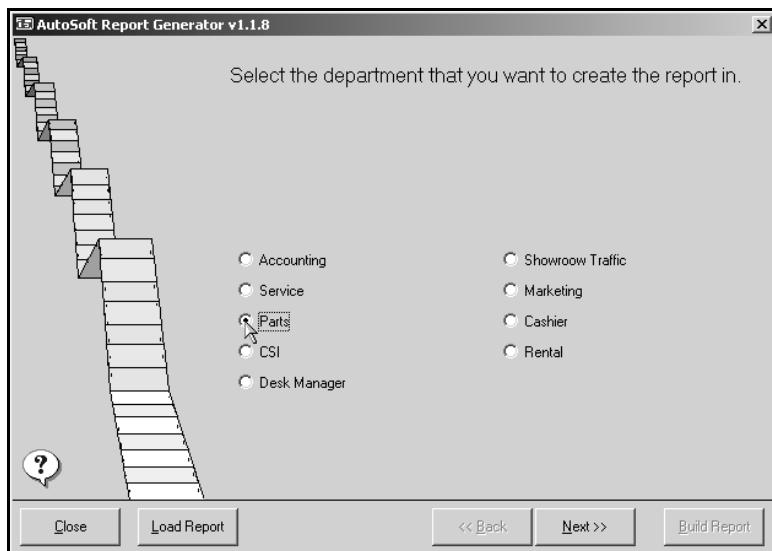
You are now ready to begin learning how to generate report. The following chapters walk you through creating a report, viewing the report in the report viewer, and managing your report.

## Chapter 1 Creating a New Report

This chapter walks you through creating a new report. Once you understand the general steps used to create a report, you can create custom reports easily.

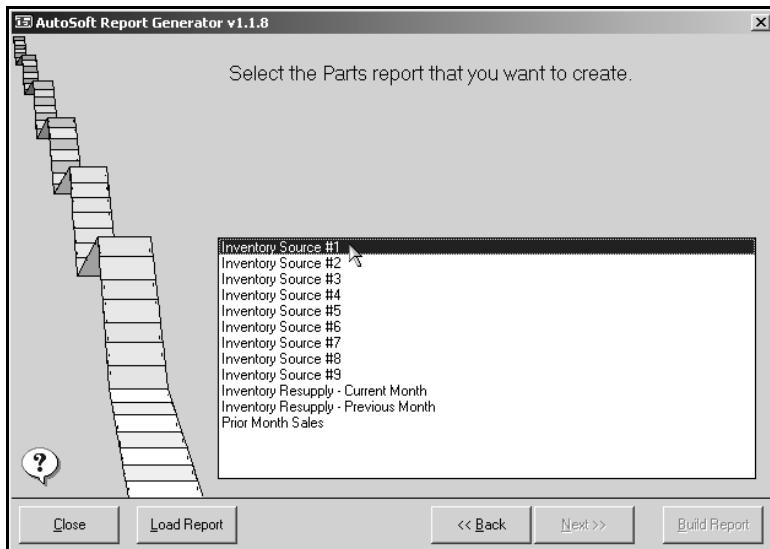
### Creating a Report

1. A list of departments is displayed on the screen. (Each department corresponds to an area of the program.)
2. Click the circle in front of the department you want to select for the report.



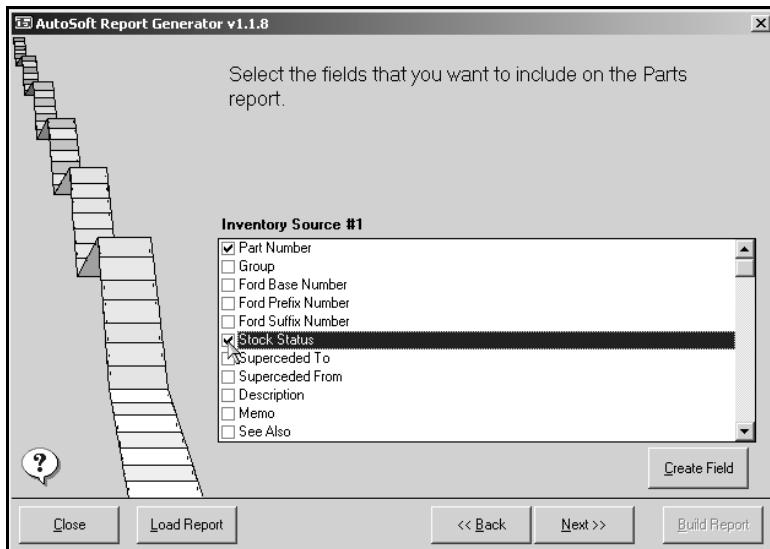
3. Click **Next** to advance to the next screen.

4. A list of the available reports is displayed. Click the report you want to select, and click **Next** to continue.



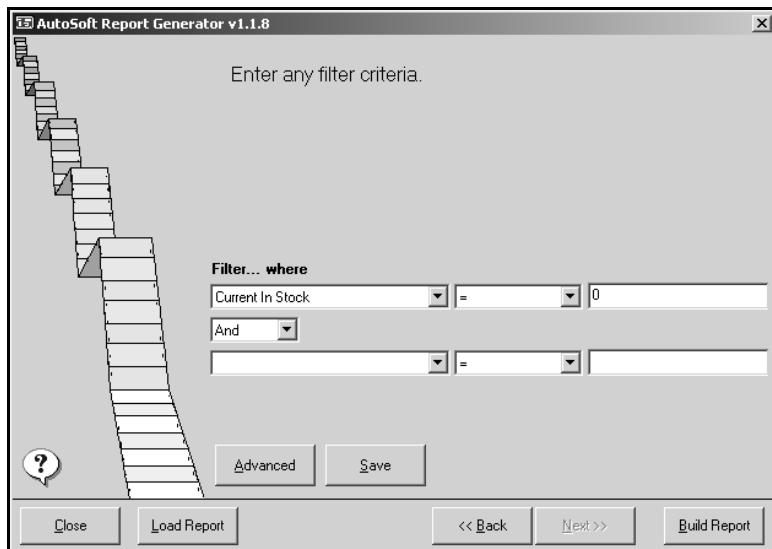
5. A list of available fields is displayed in the middle of the screen. Scroll through the list, and click in the box in front of the field description to select that field. A check mark appears in the box to indicate you have selected the field. You may select as many fields as you want to select.

If necessary, you can also create a customized field by clicking **Create Field**. (See Chapter 3 "Creating a Field" on page 9 for instructions on creating fields.)



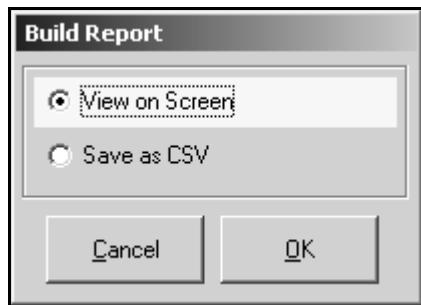
6. When you are finished selecting fields, click **Next** to advance to the next screen.

7. Use the first drop-down list to select the field you want to filter.
8. Use the next drop-down list to select a qualifier. You have four options:
  - **=** means “is equal to.”
  - **<=** means “is less than or equal to.”
  - **>=** means “is greater than or equal to.”
  - **<>** means “is not equal to.”
9. Type the filter criteria you want to use in the last field. If you are entering dates, you can use any variation of m/d/y. If you enter an invalid date, the system treats the date as 12/31/1977.



10. Use the second set of filtering fields to add a second set of filters to the report.
11. If needed, click **Advanced** to enter advanced criteria that will be used to generate the report. (See Chapter 4 “Creating Advanced Settings” on page 13 for instructions on using advanced settings.)
12. Click **Build Report** to generate the report.

13. The system prompts you to indicate if you want to view the report on your screen or if you want to save the report as a CSV file. Click to select **View on Screen** to view the report in the Report Viewer, or click to select **Save as CSV** to save the report. If you will be exporting the data to Microsoft Excel, you will select the **Save as CSV** option.



14. Click **OK** to continue. The system begins building the report. This may take several minutes.
15. If you selected to view the report, the report is displayed on your screen.

If you selected to save the report, the system displays a message indicating where the report is saved. Click **Open** to view the report in Microsoft Excel or **Close** to continue working in the Report Generator.



## **Chapter 2 Viewing the Report in the Report Viewer**

If you selected to view the generated report on your screen, it is displayed in the Report Viewer. You can print the report from this screen. You also have the option of saving the report as a comma-delimited file or as an html file.

### **Viewing the Report**

1. The report is displayed on screen.
2. The toolbar indicates the total number of pages for the report.
3. Use the scroll bar on the right side of the screen to scroll through the current page of the report.
4. Use the arrow buttons on the toolbar to advance through the pages of the report.

Click  to display the first page of the report.

Click  to display the previous page.

Click  to display the next page.

Click  to display the last page of the report.

5. Click  to specify the zoom percentage to determine how large or small the report is displayed on the screen.

### **Printing the Report**

1. Click . The Print dialog appears.
2. In the Print dialog, specify the print criteria you want to use.
3. Click **Print** (or **OK**) to print the report.

## Saving the Report in a Selected Format

From the report viewer, you can save the report in two formats:

**HTML:** This saves the report as an html file.

**CSV:** This saves the report as a comma-delimited file. If you want to be able to open the information in Microsoft Excel, you will need to save the report in this format.

### Saving the Report

1. Click the button that corresponds to the format you want to use to save the report.
2. The system displays a message indicating where it saved the file and what it named the file.
3. Click **Close** to close the message or **Open** to open the report in the selected format.



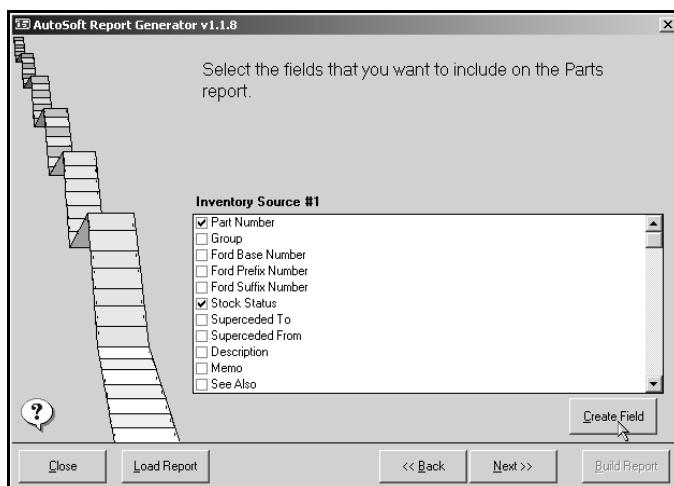
**Tip:** Once the generated report is opened in the selected format, you can save it to a specified location and assign it a specific file name. This allows you to view this report as needed. Click **File** and **Save As**. Specify where you want to save the report, and enter a name for the report. Click **OK** to save the report.

# Chapter 3 Creating a Field

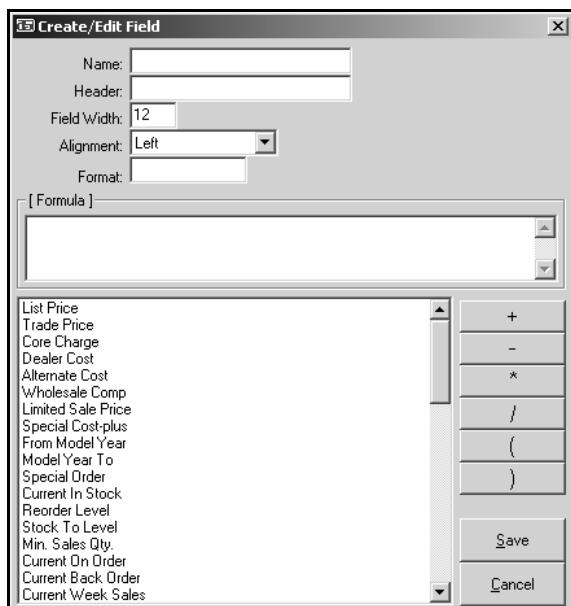
You can use the **Create Field** button on the Select Fields screen to create or edit a field for the report you want to generate. This feature allows you to create one field based on a combination of fields using a mathematical operation, such as taking the value of one field multiplied by the value of another field for the same record. When creating a field, you can only select to include fields displayed in the available list. Creating a field only allows the combination of numerical fields. Text fields cannot be used to create a field.

## Creating a Field

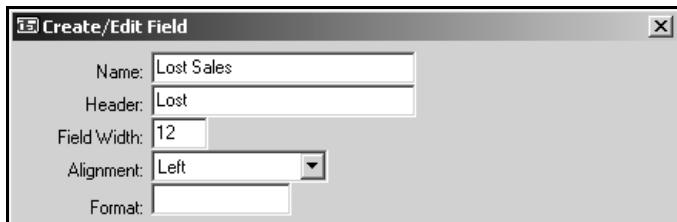
1. Click **Create Field**.



2. The Create/Edit screen appears.



3. In **Name**, type a name for the field.
4. In **Header**, type the header you want to print on the report for the field.
5. In **Field Width**, specify the width of the field. For example, if you enter 12, the field will hold 12 characters.
6. Use the drop-down list to select the header alignment.



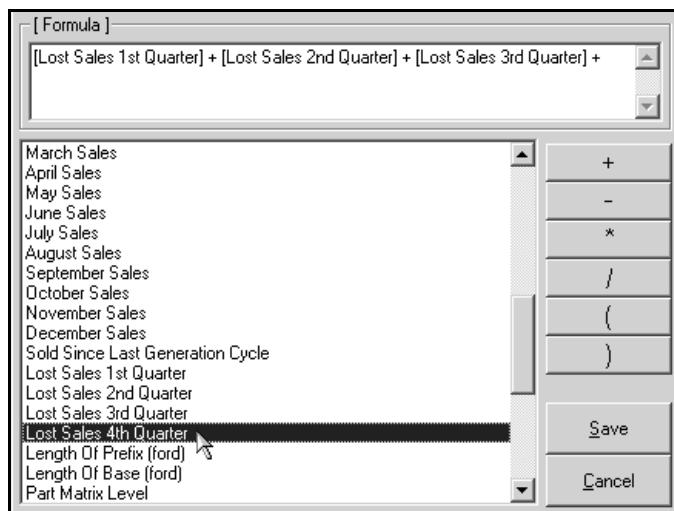
7. In **Format**, specify any special format you want the field to use. The format you enter determines how the report displays the data. For example, if you enter \$ or Currency as the format and the system retrieves a value of 1234.567, the report displays the value as \$1234.56 on the report.

The following table provides examples of formats you can enter and examples of how the report will display the data.

Format	Retrieved Data	Data displayed on report as
<b>Currency</b>	1234.567	\$1234.56
\$	1234.567	\$1234.56
<b>Percent</b>	0.123	12.30%
#,###.##	1234.567	1,234.5 (mask)
#,###.00	1234.567	1,234.57
<b>Yes/No</b>	1	True
<b>Yes/No</b>	0	False
@@-@@-@@	123456	12-34-56

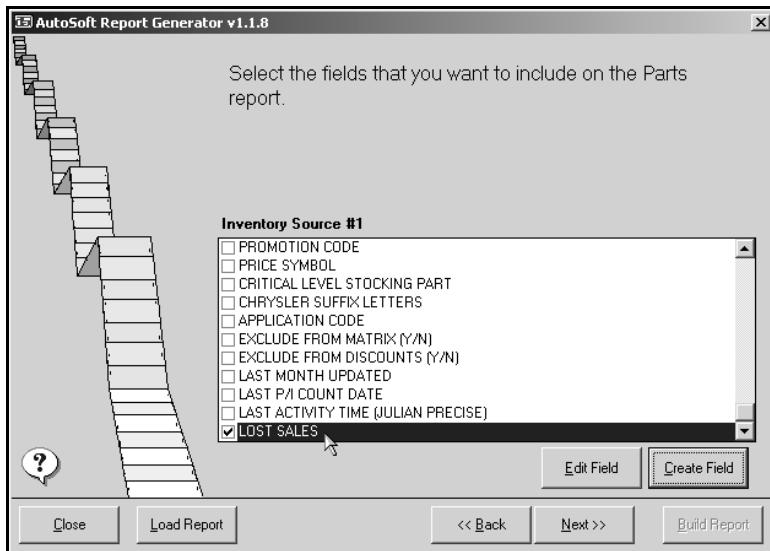
8. Type the formula that will be used to generate the field. Click the items in the list to add them to the formula, and click the mathematical buttons on the left side of the screen to determine how the information is calculated.

- + adds the selected items.
- subtracts the items.
- \* multiplies the items.
- / divides the items.
- ( begins the grouping of items.
- ) ends the grouping of items.



9. Click **Save** to save the field.

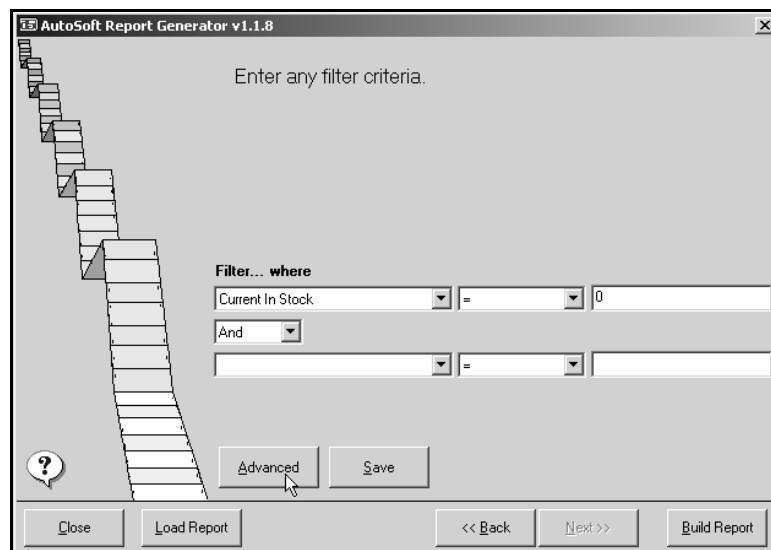
10. The field is available in the field list so you can add it to the report. Scroll through the field list, and click the field to select it.



**Tip:** Click **Edit Field** to edit the new field again if needed.

## Chapter 4 Creating Advanced Settings

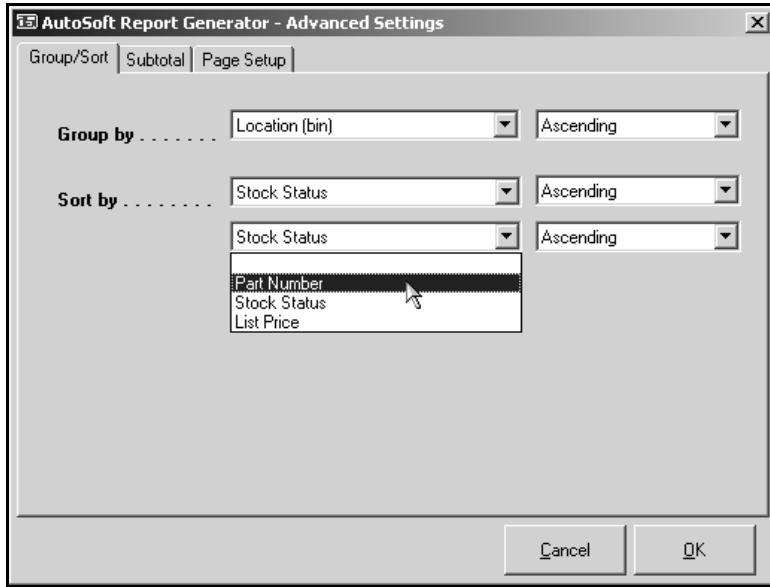
The **Advanced** button on the Filter screen is used to enter advanced criteria that will be used to generate the report. The screen consists of three tabs: **Group/Sort**, **Subtotal**, and **Page Setup**. Specify the appropriate information on each tab as needed.



## Using the Group/Sort Tab

This tab is used to enter advanced grouping and sorting criteria.

1. Use the **Group by** drop-down list to select how you want to group the report.
2. Select if you want to group in ascending or descending order.
3. Use the **Sort by** drop-down lists to select how you want to sort the report.

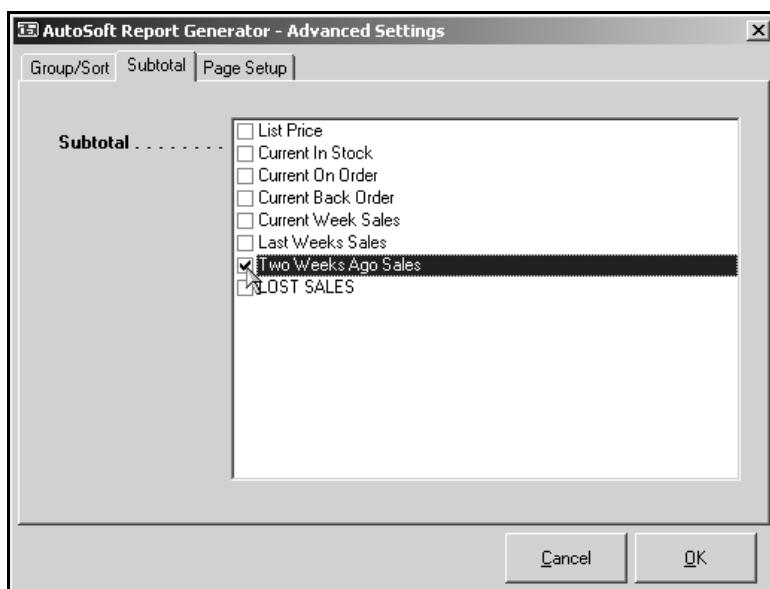


4. Select if the sort will be in ascending or descending order.
5. Click **OK** to save the settings (or click **Subtotal** or **Page Setup** to set additional settings).

## Using the Subtotal Tab

This tab is used to select the amounts you want subtotalized on the report.

1. A list of the fields that are available for subtotaling is displayed.
2. Click in the box in front of the item to select it. A check mark appears in the box to indicate you selected the item.

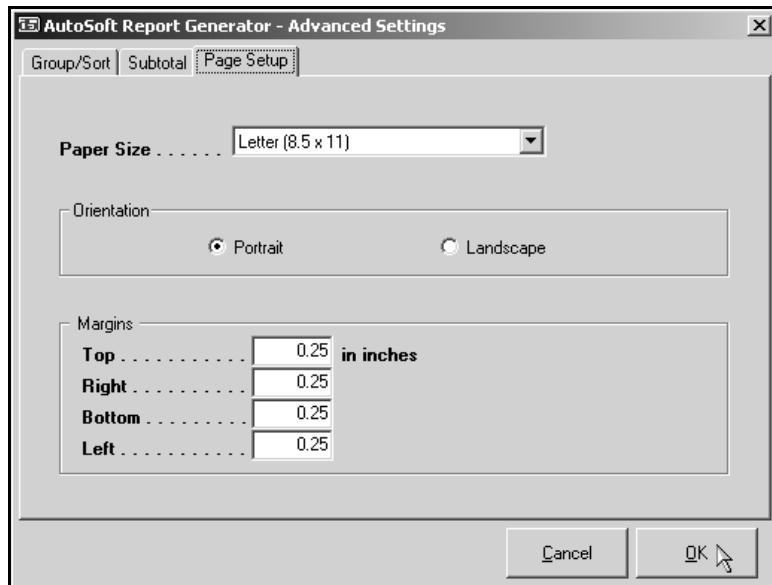


3. Click **OK** to save the settings (or click **Group/Sort** or **Page Setup** to set additional settings).

## Using the Page Setup Tab

If a displayed report in the Report Viewer does not display all the data selected in the Report Generator, then not all of the data will fit in the Viewer for display. One option is to change the paper orientation or size. Click **Advanced** and then **Page Setup**. You will use the Page Setup tab to determine how the report will print.

1. Use the **Paper Size** drop-down list to select the paper size that will be used to print the report.
2. Select if you will be printing the report in **Portrait** or **Landscape** format.
3. Under **Margins**, type the values you want to use for the margins.
4. Click **OK** to accept the settings.

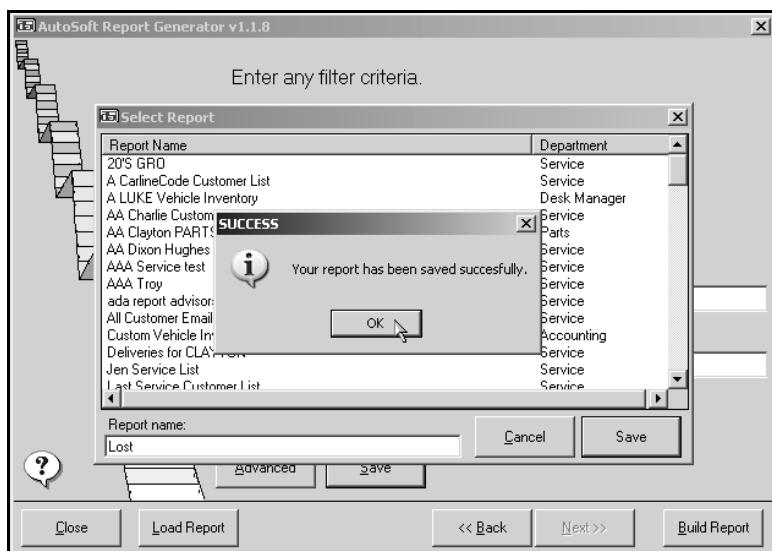


**Tip:** There is only so much data that can fit on a letter or legal-sized paper. If your data still does not fit in the Report Viewer after editing the Page Setup settings, consider saving the report as a CSV file for viewing in Microsoft Excel. Excel has more options for scaling data to fit on different paper sizes.

## Chapter 5 Saving the Report

Once you create a report, you can save the report criteria in the Report Generator so you can run the report in the future without having to re-enter the report criteria. The report will be available in a report list. All you have to do is select the report, edit any information you may want to change, and build the report.

1. Once all of the report criteria have been entered on all of the screens in the Report Generator, click **Save**.
2. In **Report name**, type a name for the report.
3. Click **OK**.
4. The system prompts you that the report has been saved.
5. Click **OK** to acknowledge the message.

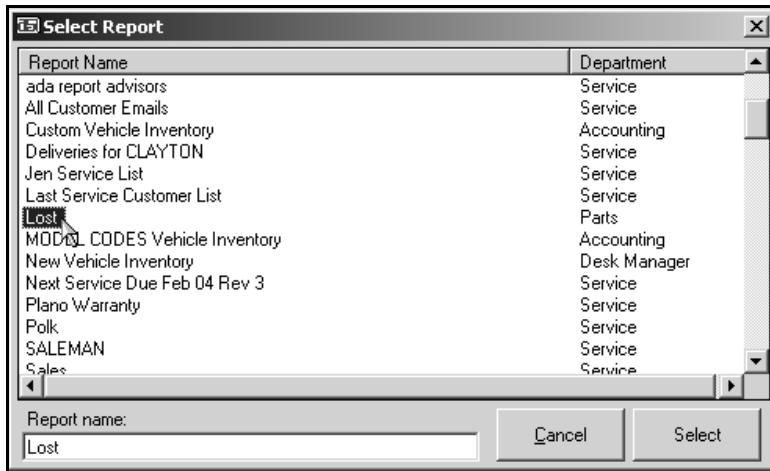


**Tip:** This saves the report in the Report Generator. If you exported the report data to Microsoft Excel, you can save the information through Excel in the directory of your choice.

## Opening a Saved Report

Once you have saved a report in the Report Generator, you can open the report and use it to generate information as needed.

1. Open the Report Generator.
2. Click **Load Report**. A list of the saved reports appears.
3. Click the report in the list, and click **Select**.

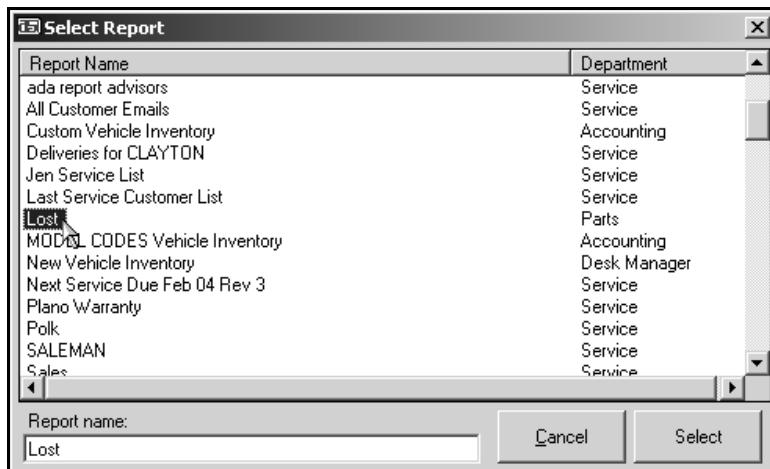


4. You are advanced to the Criteria screen to enter filters for the report.
5. Click **Build Report** to generate the report.

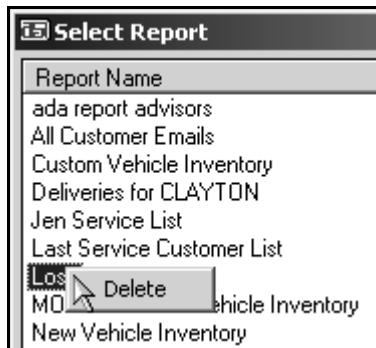
## Deleting a Saved Report

You can delete saved reports. This helps to keep your report list from getting too long. You cannot retrieve a deleted report. If you delete a report, you will have to recreate the report if you want to use it again.

1. Open the Report Generator.
2. Click **Load Report**. A list of the saved reports appears.
3. Click the report you want to delete. The report is highlighted to indicate you selected it.



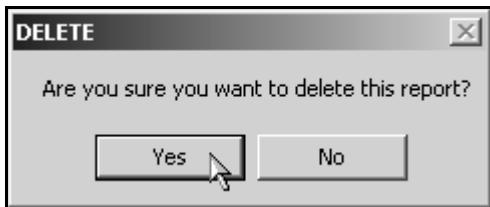
4. Right-click the report. A **Delete** prompt appears.



5. Left-click **Delete**.



6. Click **Yes** when prompted to verify you want to delete the report.



7. The report is removed from the list.
8. Click **Cancel** to close the Select Report screen.

## Conclusion

This completes the instructions for using the Autosoft Report Generator. As you become familiar with the feature, do not hesitate to generate several reports to help you become familiar with how the program pulls information and displays it on the reports. When generating a report, you may find you need to generate the report using different options before you get the information you want. If you cannot generate a report that provides the information you are looking for, call Autosoft International at (800) 473-4630. A Support Desk Representative may be able to help you generate the report you need.

The appendices that follow provide optional information you can use while generating reports. This includes instructions for building sample reports, instructions for preparing exported data in Microsoft Excel to be used for mail merges, and creating mail merge documents in Microsoft Word.



## Appendix A Building a Sample Accounting Report

This appendix walks you through building a sample vehicle inventory report. We will not be selecting all of the fields because typically no one ever does that. Custom vehicle reports usually only contain the fields desired, not every field in the available list. Before generating the report, Autosoft recommends that you re-sort the vehicle inventory using the Car Sheets menu in Desk Manager. Click **Yes** when prompted to indicate if you want to re-sort the inventory, or click **Re-Sort Inventory** on the menu. Re-sorting the vehicle inventory ensures that the report will be current.

1. Click **Start**, and point to **Programs** (or **All Programs**).
2. Point to **Autosoft Applications**, and click **ASI Report Generator**.

**Tip:** If you cannot find **Autosoft Applications**, then you may need to click **Start**, point to **Programs**, and look at the bottom of the Programs Menu for a set of double arrows. Click the arrows to reveal the remaining items of the Programs Menu.

3. Click **Accounting**, and Click **Next**.
4. Click **Vehicle Inventory** to highlight it, and click **Next**.
5. Click to select the box next to the fields you want to select. A check mark will appear in the box. For this report, select the following fields:
  - Stock Number**
  - Active Deal** (This field will indicate the Deal Status of the vehicle, whether it has been sold or not.)
  - Year of Car**
  - Make of Car**
  - Model of Car**
  - Odometer**
  - New/Used**
  - Date In Stock**
  - Msrp**
6. Click **Next**.
7. Usually customers want either a new or a used vehicle list, not a combined list. On the first row, select **New/Used** from the drop-down list. (You need to click the small dark triangle to display the list.)
8. Click in the last field in this row, and type a capital **U** in the box to filter for used vehicles only.
9. Click **Advanced** at the bottom left.
10. In the Group By row, select **Year of Car** from the drop-down list.

11. In the first Sort By row (the second row on the screen), select **Model of Car** from the drop-down list.
12. Click **OK** at the bottom right.
13. Click **Build Report** at the bottom.
14. The default viewing option is to **View on Screen**. Click **OK** here to view the report on screen in the ASI Report Viewer. (It is advisable to view the report on screen first to make sure it contains desired information and looks correct.)

The **Save as CSV** option begins the process of sending the data to Excel. If you select this option, click **OK**. When you are prompted, click **Open**. If the data is to be saved in Excel, make sure to save it to a designated folder besides the default ASIP folder. A common folder to save files to is the My Documents folder.
15. To save the report settings that have been built in the Report Generator, do the following:
  - a. Either minimize the ASI Report Viewer down to the taskbar, or click **Close** on the toolbar at the top of the screen.
  - b. Click **Save** on the ASI Report Generator.
  - c. In the **Report name** field, type a descriptive name for the custom report. Use alphanumeric characters and/or spaces only in the name. Be sure to avoid using any characters besides alphanumeric characters.
  - d. Click **Save** to the right.
  - e. A message that the report was successfully saved will be displayed. Click **OK**.
16. If you want to send the report in the ASI Report Viewer to Excel, click the **CSV** button at the top of the Viewer. Click **Open**. A copy of the data will be exported to Excel. Excel will open and then minimize itself down to the taskbar at the bottom of the screen. Click the **Excel** item on the taskbar to bring Excel back up on screen.
1. Click **Load Report** at the bottom left to verify that the saved report is now present in the list of Report Generator custom reports. This is also how you will recall the report for future use. Click **Cancel** to close the list.

## Other Options

Accounting vehicle reports will bring all vehicles to the report including sold vehicles for the current month, even if they are assigned a Deal Status 3 to the vehicle. These vehicles will drop off this report the first of next month. If a report is desired that excludes sold vehicles, then two options are available:

1. At steps 7 and 8, select **Active Deal** from the first drop-down list in the third row. Click in the third box in this row, and type **0** (a zero not the letter O).
2. Build the report using the **Desk Manager** option on the first screen of the Report Generator. Desk Manager only displays vehicles with a Deal Status of 0 (zero).

## Appendix B Building a Sample Service Report

There are three reports available for the Service module: customer list, service R/O history, and service technicians report. The customer list is generally used to pull customer information. The service R/O history is used to pull more information about the R/O. The service technician report is used to pull technician time figures. The reports are separate and cannot be combined into one report in the generator. These reports do not include every available field of data from ASI DMS. Information from all reports can be exported to Excel. For our example, we will build a sample customer list.

1. Click **Start**, and point to **Programs** (or **All Programs**).
2. Point to **Autosoft Applications**, and click **ASI Report Generator**.

**Tip:** If you cannot find **Autosoft Applications**, then you may need to click **Start**, point to **Programs**, and look at the bottom of the Programs Menu for a set of double arrows. Click the arrows to reveal the remaining items of the Programs Menu.

3. Click **Service**, and Click **Next**.
4. You will see three reports listed for the Service module. For this example, click **Customer List** to highlight it, and Click **Next**.
5. Click to select the box next to the fields you want to select. A check mark will appear in the box. For this report, select the following fields:
  - Customer Number**
  - VIN**
  - Customer Name**
  - Salesman Code**
  - Salesman Name**
  - Vehicle Year**
  - Vehicle Make**
  - Vehicle Model** (not Model Code)
  - Delivery Date**
  - New/Used/Other**
6. Click **Next**.
7. On the first row, select **Delivery Date** from the drop-down list.
8. On the same row, select **>=** (greater than or equal to) from the second drop-down list.
9. Click in the last field in this row, and type **01/01/91**. You must enter the date using the format mm/dd/yy. Use two digits per date specification and forward slashes (not back slashes). The

10. forward slash can be found by pressing the question mark key on the keyboard. If the date is not formatted correctly, then the report will not pull data correctly.
11. Click **Advanced** at the bottom left.
12. In the Group By row, select **Salesman Code** from the drop-down list.
13. In the first Sort By row (the second row on the screen), select **Delivery Date** from the drop-down list.
14. Click **OK** at the bottom right.
15. Click **Build Report**.
16. The default viewing option is to **View on Screen**. Click **OK** here to view the report on screen in the ASI Report Viewer. (It is advisable to view the report on screen first to make sure it contains desired information and looks correct.)

The **Save as CSV** option begins the process of sending the data to Excel. If you select this option, click **OK**. When you are prompted, click **Open**. If the data is to be saved in Excel, make sure to save it to a designated folder besides the default ASIP folder. A common folder to save files to is the My Documents folder.
17. This is a sample report displaying to whom the deliveries in the database are assigned. It will identify any salesmen's codes that may need to be changed in ASI DMS Accounting or identify if the deliveries are being assigned correctly when the deals are being posted all the way through ASI DMS.
18. If you want to send the report in the ASI Report Viewer to Excel, click the **CSV** button at the top of the Viewer. Click **Open**. A copy of the data will be exported to Excel. Excel will open and then minimize itself down to the taskbar at the bottom of the screen. Click the **Excel** item on the taskbar to bring Excel back up on screen.
19. To save the report settings that have been built in the Report Generator, do the following:
  - a. Either minimize the ASI Report Viewer down to the taskbar, or click **Close** on the toolbar at the top of the screen.
  - b. Click **Save** on the ASI Report Generator.
  - c. In the **Report name** field, type a descriptive name for the custom report (for example, Deliveries by Salesman). Use alphanumeric characters and/or spaces only in the name. Be sure to avoid using any characters besides alphanumeric characters.
  - d. Click **Save** to the right.
  - e. A message that the report was successfully saved will be displayed. Click **OK**.
20. Click **Load Report** at the bottom left to verify that the saved report is now present in the list of Report Generator custom reports. This is also how you will recall the report for future use. Click **Cancel** to close the list.

## Appendix C Building a Sample Parts Report

Before attempting to build a parts report, call Autosoft International Parts Support to see if the desired report already exists in ASI DMS Parts Inventory. In order for the Report Generator to pull correct part information, you must open ASI DMS, click **Parts Inventory**, press F5, and click on the desired inventory source. Then, open the Report Generator to generate your parts report as instructed below. We will build an aged inventory report.

1. Click **Start**, and point to **Programs** (or **All Programs**).
17. Point to **Autosoft Applications**, and click **ASI Report Generator**.

**Tip:** If you cannot find Autosoft Applications, then you may need to click **Start**, point to **Programs**, and look at the bottom of the Programs Menu for a set of double arrows. Click the arrows to reveal the remaining items of the Programs Menu.

18. Click **Parts**, and Click **Next**.
19. Click the desired inventory source, and click **Next**.
20. Click to select the box next to the fields you want to select. A check mark will appear in the box. For this report, select the following fields:
  - Part Number** (This field will already have a check mark to be included.)
  - Description**
  - Location (bin)**
  - Location (shelf)**
  - Location (drawer)**
  - Current in Stock**
  - Last Sale Date**
21. Click **Next** at the bottom.
22. On the first row, select **Last Sale Date** from the drop-down list.
23. On the same row, select **<=** (less than or equal to) from the second drop-down list.
24. Click in the last field in this row, and type a date 12 months ago with the following format: mm/dd/yy. You must enter the date using the format mm/dd/yy. Use two digits per date specification and forward slashes (not back slashes). The forward slash can be found by pressing the question mark key on the keyboard. If the date is not formatted correctly, then the report will not pull data correctly.
25. On the third row, select **Current In Stock** from the drop-down list.
26. On the third row, select **>=** (greater than or equal to) from the second drop-down list.

27. Click in the last field in this row, and type **1**.
28. If desired, you can choose the following advanced options to group and sort the report. This is optional. You can also choose to skip this step and continue with step 14.
  - a. Click **Advanced**.
  - b. In the Group By row, select **Location (bin)** from the drop-down list.
  - c. In the first Sort By row (the second row on the screen), select **Location (shelf)** from the drop-down list.
  - d. In the second Sort By row (the third row on the screen), select **Location (drawer)** from the drop-down list.
  - e. Click **OK** at the bottom right.
29. Click **Build Report** at the bottom right.
30. The default viewing option is to **View on Screen**. Click **OK** here to view the report on screen in the ASI Report Viewer. (It is advisable to view the report on screen first to make sure it contains desired information and looks correct.)

The **Save as CSV** option begins the process of sending the data to Excel. If you select this option, click **OK**. When you are prompted, click **Open**. If the data is to be saved in Excel, make sure to save it to a designated folder besides the default ASIP folder. A common folder to save files to is the My Documents folder.
31. If you want to send the report in the ASI Report Viewer to Excel, click the **CSV** button at the top of the Viewer. Click **Open**. A copy of the data will be exported to Excel. Excel will open and then minimize itself down to the taskbar at the bottom of the screen. Click the **Excel** item on the taskbar to bring Excel back up on screen.
32. To save the report settings that have been built in the Report Generator, do the following:
  - a. Either minimize the ASI Report Viewer down to the taskbar, or click **Close** on the toolbar at the top of the screen.
  - b. Click **Save** on the ASI Report Generator.
  - c. In the **Report name** field, type a descriptive name for the custom report (for example, Aged Parts Report). Use alphanumeric characters and/or spaces only in the name. Be sure to avoid using any characters besides alphanumeric characters.
  - d. Click **Save** to the right.
  - e. A message that the report was successfully saved will be displayed. Click **OK**.
33. Click **Load Report** at the bottom left to verify that the saved report is now present in the list of Report Generator custom reports. This is also how you will recall the report for future use. Click **Cancel** to close the list.

**Tip:** Before accessing a saved Parts report using the **Load Report** button in the Report Generator, always make sure to go to ASI DMS Parts Inventory and choose the appropriate parts inventory source by pressing F5 on your keyboard and clicking the inventory source you want to use for the report. This ensures that the saved report will be pulling parts data from the correct inventory source.

## Appendix D Building a Sample Desk Manager Report

We will build a sample vehicle inventory report. Desk Manager vehicle reports will exclude all vehicles marked with a Deal Status 3. Before generating the report, Autosoft recommends that you re-sort the vehicle inventory using the Car Sheets menu in Desk Manager. Click **Yes** when prompted to indicate if you want to re-sort the inventory, or click **Re-Sort Inventory** on the menu. Re-sorting the vehicle inventory ensures that the report will be current.

1. Click **Start**, and point to **Programs** (or **All Programs**).
2. Point to **Autosoft Applications**, and click **ASI Report Generator**.

**Tip:** If you cannot find **Autosoft Applications**, then you may need to click **Start**, point to **Programs**, and look at the bottom of the Programs Menu for a set of double arrows. Click the arrows to reveal the remaining items of the Programs Menu.

3. Click **Desk Manager**, and Click **Next**.
4. Click **Vehicle Inventory** to highlight it, and Click **Next**.
5. Click to select the box next to the fields you want to select. A check mark will appear in the box. For this report, select the following fields.
  - Vehicle Year**
  - Stock Number**
  - Vehicle Make**
  - Vehicle Model**
  - Date In**
  - Vin**
  - New Or Used**
  - Cash Price**
6. Click **Next**.
7. Usually customers want either a list of new or used vehicles, not a list combined of both new and used. On the first row, select **New Or Used** from the drop-down list.
8. Click in the last field in this row, and type capital **U** to filter for used vehicles only.
9. Click **Advanced** at the bottom left.
10. In the Group By row, select **Vehicle Year** from the drop-down list.
11. In the first Sort By row, select **Vehicle Model** from the drop-down list.

12. Click **OK** at the bottom right.
13. Click **Build Report** at the bottom right.
14. The default viewing option is to **View on Screen**. Click **OK** here to view the report on screen in the ASI Report Viewer. (It is advisable to view the report on screen first to make sure it contains desired information and looks correct.)

The **Save as CSV** option begins the process of sending the data to Excel. If you select this option, click **OK**. When you are prompted, click **Open**. If the data is to be saved in Excel, make sure to save it to a designated folder besides the default ASIP folder. A common folder to save files to is the My Documents folder.
15. If you want to send the report in the ASI Report Viewer to Excel, click the **CSV** button at the top of the Viewer. Click **Open**. A copy of the data will be exported to Excel. Excel will open and then minimize itself down to the taskbar at the bottom of the screen. Click the **Excel** item on the taskbar to bring Excel back up on screen.
16. To save the report settings that have been built in the Report Generator, do the following:
  - a. Either minimize the ASI Report Viewer down to the taskbar, or click **Close** on the toolbar at the top of the screen.
  - b. Click **Save** on the ASI Report Generator.
  - c. In the **Report name** field, type a descriptive name for the custom report (for example, Deliveries by Salesman). Use alphanumeric characters and/or spaces only in the name. Be sure to avoid using any characters besides alphanumeric characters.
  - d. Click **Save** to the right.
  - e. A message that the report was successfully saved will be displayed. Click **OK**.
17. Click **Load Report** at the bottom left to verify that the saved report is now present in the list of Report Generator custom reports. This is also how you will recall the report for future use. Click **Cancel** to close the list.

## Appendix E Creating Sample Fields

Remember, when creating a field, you can only select to include fields displayed in the available list. Creating a field only allows the combination of numerical fields. Text fields cannot be used to create a field.

### Creating a Customized ACV Field

You would choose to create a field, for example, if your dealership wants to sum several fields together in a vehicle inventory report to create an ACV field unique to that dealership. An example would be to add Dealer Prep + Actual Cash Value + Advertising. That would result in a customized total unique to that specific report for that specific dealership. The following instructions walk you through creating a field to display a custom ACV in a Desk Manager vehicle inventory report built in the Report Generator. These steps would be completed at step 5 in the instructions for generating the Desk Manager inventory report in Appendix C.

1. Click **Create Field**.
2. Type **CustACV** in the **Name** field.
3. Type **CustACV** in the **Header** field.
4. Select **Right** from the **Alignment** list.
5. Type **\$** in the **Format** field to format for currency.
6. Click in the **Formula** box.
7. Click **Dealer Prep** in the list.
8. Click the **+** button on the right
9. Click **Actual Cash Value** in the list below.
10. Click the **+** button on the right.
11. Click **Advertising** in the list.
12. Click **Save** at the bottom right.
13. The created field now appears at the bottom of the fields list. Click to select the field. A check mark will appear in the box.
14. Continue to build the report as described in the Desk Manager report example.

## Creating Number of Days in Inventory in a Vehicle Inventory Report

“Days in Inventory” is not available as a field from either the Accounting or Desk Manager list in the Report Generator. An option is to choose the **Date In** field along with all the other desired fields and export that data to Excel using the procedure described in Appendix D.

1. In Excel, insert a column, apply a label to the first cell such as “Days in Inventory,” and make it **bold**, along with all the other column labels.
2. If the date for the vehicle is in cell D2, for example, and the Days in Inventory column is column E, then type the following into cell E2: **=today()-D2**.

**Important:** There are **no spaces** between any of the characters in the formula. You must type the formula this way to ensure it calculates correctly.

3. Press the ENTER key on the keyboard.
4. Right-click on the cell where the formula was just entered, and click “Format cells.”
5. The **Number** tab should be displayed. If it isn’t, click this tab.
6. Click **General** in the **Category** list, and click **OK**. The number of days is displayed.
7. To copy the formula for the remaining cells, left-click the cell containing the number of days in inventory. Notice the black square at the bottom right of this currently active cell. Place the mouse pointer on this black square. The pointer changes to a dark plus sign, called a Fill Handle. Left-click and hold the Fill Handle, and drag it straight down to the last cell in the Days in Inventory column to the last vehicle record.
8. The formula has now been copied for each vehicle.

## Appendix F Preparing Data in Microsoft Excel 2000

This appendix explains how to prepare your data in Microsoft® Excel so it can be successfully merged in Microsoft Word 2000 to create mailing labels or form letters. These instructions are applicable to Microsoft Excel 2000. The instructions won't be the same for XP Office Suite Word and Excel, but the principles are very close.

### Before you Begin

This section provides valuable information and tips you can use while working in Excel. Please read all of the information before you begin working. You'll be glad you did.

- The instructions on the following page assume you have already compiled a list of addresses in the ASI Report Generator and exported it to Microsoft Excel (using the Save as CSV option when building the report).
- You will be creating a “DATA SOURCE” in Excel from which to pull your address data in the mail merge document in Microsoft Word. Be sure to save this Excel file.
- When saving a workbook in Excel, always change the file “Save as type” at the bottom of the saving window to something like MS Workbook 97-2000. This will enable all editing, filtering, and modifying of the customer data file to be saved, which are essential.
- Do not do any formatting to the data in this data file except for making the first row of column labels **Bold**. *This is a required step.*
- If your ZIP Codes begin with the number zero (0), you will need to format the cells containing the ZIP Codes after the data is transferred to Excel. Format the cells as follows:
  1. Click the first cell containing a ZIP Code that begins with zero.
  34. Click **Format** from the menu bar at the top.
  35. Click **Cells**.
  36. Click the **Number** tab at the top of this new window
  37. Scroll down in the **Category** column, and click **Special**.
  38. To the right in the **Type** column, click **Zip Code**.
  39. Click **OK**.
  40. Copy the formatting of this cell that displays the zero in front of the ZIP Code to the remaining ZIP Code cells. (If you don't know how to do that, look up Format Painter in the Help area of Excel. It will save you time in this process.)

## Preparing Data

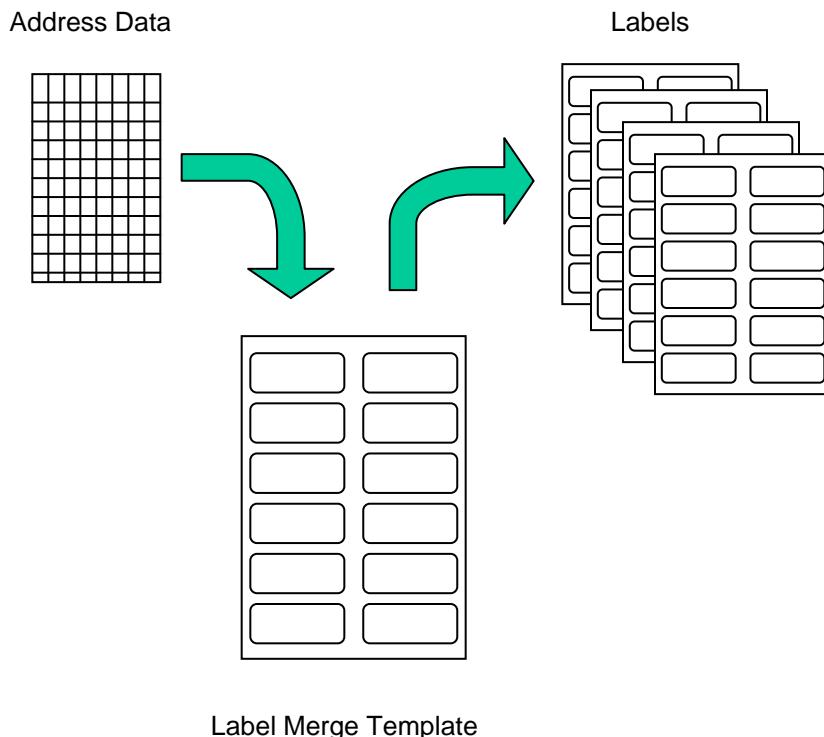
1. Assuming you have already exported the data from the ASI Report Generator and you're looking at the label data in an Excel workbook, expand the columns out so you can read the data. (This is optional.)
2. Make the column headers/label headers **Bold** so Microsoft Word can identify this information as the headers. Otherwise, Word will assume this is part of the customer information and import it into your labels. Making the column headers/label headers **bold** is a required step.
3. Use the vertical scroll bar to see if there are blank rows in your data list. Delete any blank rows. If records are missing essential data, then it is recommended to delete the whole record as well or edit the record here in Excel to make it correct for your label printing. If you do not delete records with missing data or fill in the missing data, then the mail merge most likely will not work correctly.
4. Use the following steps to delete blank records.
  - a. Click on any cell on the spreadsheet.
  - b. From the menu bar, click Data, point to Filter, and click AutoFilter. This enables drop down arrows for each of the column labels.
  - c. Scroll through the records and look for blank data fields, for instance blank addresses or blank names. Click the drop down arrows from the desired column label for the empty fields, scroll to the bottom of its list, click **Blanks**.
  - d. This action displays only the records with omitted data. The row number displays in blue to identify these rows.
  - e. Delete all of these blank rows
  - f. Once the blank rows are deleted, click the drop-down arrow again (which is blue now to indicate that this is the column you just filtered), scroll to the top of this list, and click **All**.
  - g. All of the data is displayed again, except for the deleted records.
  - h. Repeat steps a-g as necessary on other columns containing blanks in the records.
5. Save your work. Your My Documents folder is a good place to save this data file. Name it with a descriptive name so you can easily identify the file.
6. The data is ready for importing from Microsoft Word for a mail merge now.

## Appendix G Word 2000 Mail Merge for Address Labels

This appendix walks you through using the mail merge feature in Microsoft® Word 2000 to create address labels. You will be creating a template (mail merge main document) for your label templates that you can save for later repeated use. This template serves as a temporary deposit of previously collected customer data from a Microsoft Excel file, which is imported into a Word document for printing purposes.

Each time you need to create mailing labels, use this master label template to go get your current file holding your desired customer data, usually from an Excel file. The data is imported in the order in which it appears in the Excel file. If there is omitted data in your mailing data or customer data, it could impair the accuracy of your merged labels (the finished product). It's important to make sure that the source of your customer data has been "cleaned up." It's a good idea to delete any customer records from your data source that have blanks in them or fill in any omitted data fields to ensure accuracy of the merged letters.

The instructions assume you have already compiled your desired marketing information and saved it into a Microsoft Excel file. Make sure that your data in Excel has a column label for each column of data (for example, FirstName, LastName, Address, etc.). Make sure each column label is **bold**.



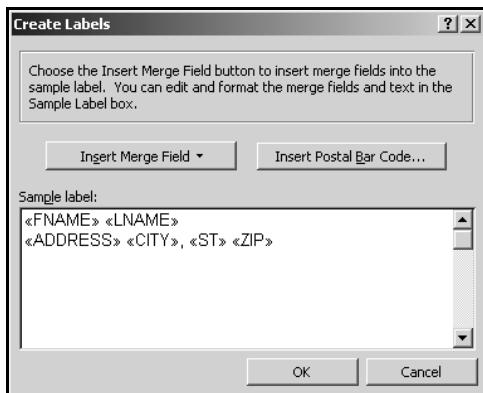
## Creating Labels

1. Open Microsoft Word
2. Click **Tools**, and select **Mail Merge**.
3. Click **Create**, and select **Mailing Labels**.
4. Click Active Window.
5. Click Get Data.
6. Click Open Data Source.
7. Navigate to find your existing Excel file of address labels. Click it, and click **Open**.
8. Make sure you leave the selection as **Entire Spreadsheet**, and click **OK**.

**Tip:** Change **Files of type** at the bottom of the window to **MS Excel Worksheets (\*.xls)** to find your data file of addresses if the file is not immediately available where it has been stored.

9. Click **Set Up Main Document**. You are in the process of creating your address label template.
10. Under **Printer Information**, verify that **Laser and ink jet** is selected. Either leave the tray selected as manual or select the appropriate tray.
11. Use the **Label products** and **Product number** lists to select the labels you will be using. Purchase the label sheets at Staples, Office Depot, etc. They must be for laser printers.
12. Click **OK**.
13. In the Create Labels window, click **Insert Merge Field**, and select the first name field (or customer full name). If necessary, press the spacebar, click **Insert Merge Field** again, and click the last name field.
14. Press the ENTER key on the keyboard.

15. Repeat step 13 to add the remaining fields to your label. Group these added fields to look like an address label. Add spaces and a comma in the places you would if you were typing the address.



16. When you are finished adding your fields, click **OK**.

17. Click **Merge**.

18. Click **Merge** again.

19. The labels are created as a separate file.

**Tip:** If you prefer to center your labels prior to printing, press CTRL + A to select all the labels at once. Then, click on the formatting toolbar at the top of the document.

20. Load the sheets of labels into the printer, and print them as needed.

21. When finished printing, close the merged list of labels (the newly created label file). There is no need to save this list of labels since you can always re-merge the address data following steps in this document whenever needed.

22. If you want to use this mail merge template in the future, save this mail merge main document in your My Documents folder. Name it something like **Mail Merge Label Template** so you can use it in the future for other letter mail merges.

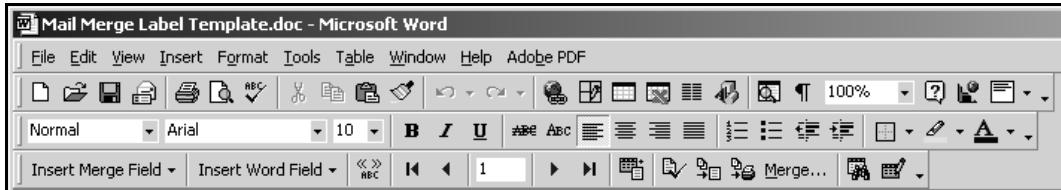
## Using Microsoft Word to Create Labels Again

This section walks you through reusing the saved label template. If you didn't save your label template, you will have to recreate it using the instructions under "Creating Labels."

1. Open the label template you created for your labels.

**Tip:** If you deleted the original data source used to create the label template or if you have moved the label template from the location where it was originally saved, Word will prompt you that it cannot find the data source when you open the template. Click **Options**, and then click **Remove Data/Header Source**.

2. The label template should have these familiar toolbars at the top.



3. Click **Mail Merge Helper** button on the mail merge toolbar.



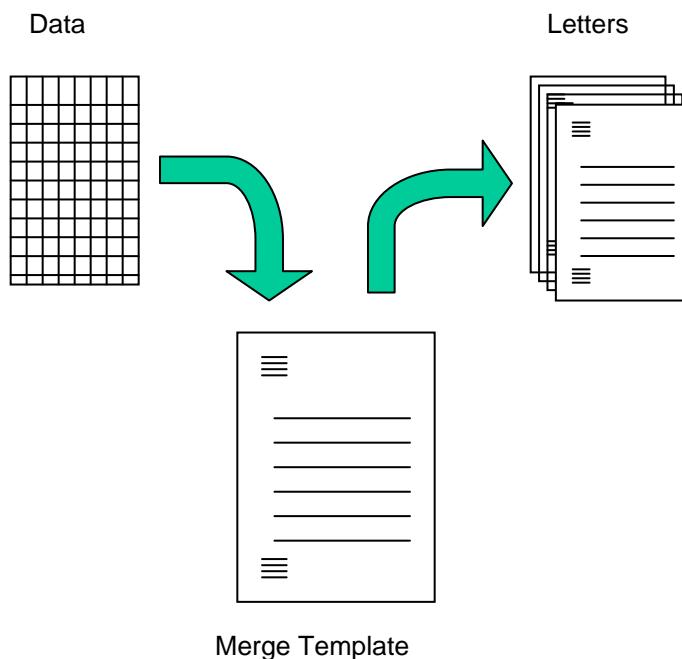
4. Click **Get Data**, and select **Open Data Source**.
5. Navigate to find your existing Excel file of address labels. Click the file, and click **Open**.
6. Make sure you leave the selection as **Entire Spreadsheet**, and click **OK**.
7. Click **Merge**.
8. Click **Merge** again.
9. The labels are created.

## Appendix H Word 2000 Mail Merge for Letters

These instructions walk you through using the mail merge feature in Microsoft® Word 2000 to create form letters. You will be creating a template (mail merge main document) for your letters that you can save for later repeated use. This template serves as a temporary deposit of previously collected customer data from a Microsoft Excel file, which is imported into a Word document for printing purposes.

Each time you need to create a customer letter, use this master letter template to go get your current file holding your desired customer information, usually from an Excel file. The data is imported in the order in which it appears in the Excel file. If there is omitted data in your mailing data or customer data, it could impair the accuracy of your merged letters (the finished product). It's important to make sure that the source of your customer data has been "cleaned up." It's a good idea to delete any customer records from your data source that have blanks in them or fill in any omitted data fields to ensure accuracy of the merged letters.

The instructions assume you have already compiled your desired marketing information and saved it into a Microsoft Excel file. Make sure that your data in Excel has a column label for each column of data (for example, FirstName, LastName, Address, etc.). Make sure each column label is **bold**.

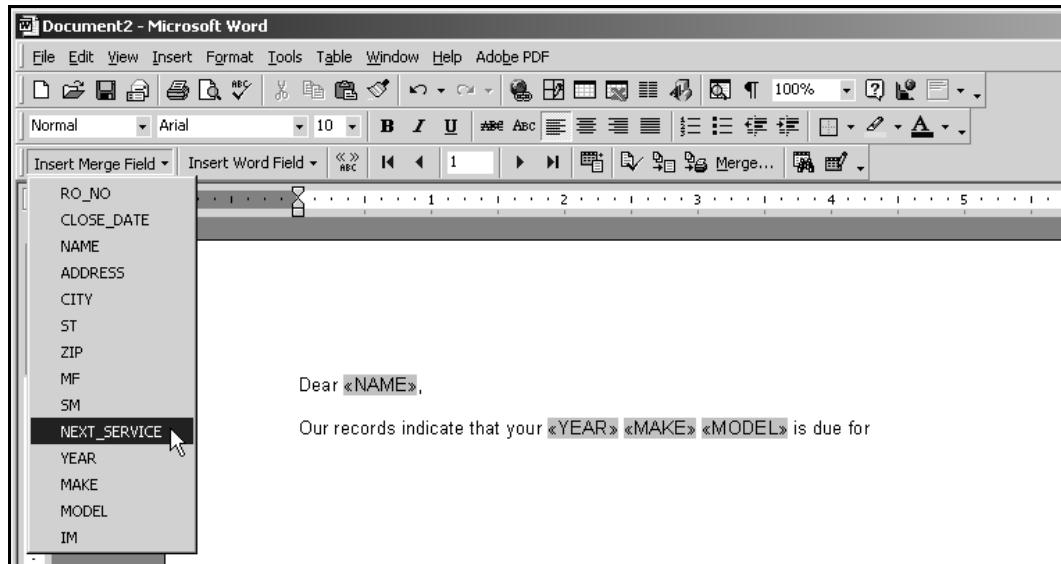


## Word 2000 Instructions for Mail Merge for Letters

1. Open Microsoft Word 2000.
2. Make sure you're in a blank Word document.
3. Click **Tools**, and select **Mail Merge**.
4. Click **Create**, and select **Form Letters**.
5. When prompted, click **Active Window**.
6. Click **Get Data**, and select **Open Data Source**.
7. In the Open Data Source window, you'll have to navigate to where your data source file is located. This is the file that contains all of your customer data that you want to merge into a letter(s). Select the file, and click **Open**.
8. Click **Edit Main Document**.
9. At this point, you will type the text for the letter. Type the desired text.

**Tip:** By now, you may have noticed a new set of shortcut buttons on a toolbar in this document you're creating. This is the mail merge toolbar. It contains icons for features you will use to create your form letter.

10. As you need to insert data from your Excel file, click **Insert Merge Field**, and click the field you want to insert into the letter. Be sure to add the necessary spaces before and after the field.



11. Continue typing your letter to add the remaining content of your customer letter.
12. Once you are finished typing the text, run the spell check to correct spelling and grammar as necessary. When the merged letters are created, this will be the exact content of all the letters merged.

**Tip:** You have not created the merged letters yet. You have only created the template that will go get the data from your Excel file. This template can be saved for future use for other customer letters. It will save you a lot of time if it is saved. We'll save it later.

13. Click  on the mail merge toolbar to see a preview of what one of the merged letters will look like after you merge the data into letters.
14. Click  again to deselect the preview.
15. Click **Merge** on the mail merge toolbar.
16. Click **Merge** on the Merge dialog box that appears.
17. The letters are created into a separate Word document. This document is one file that contains all of the letters to all of your customers from your Excel list of customers. When you are ready, print this document to your printer.
18. After printing the letters, do not save this list of merged customers. There is no need to since you can always re-merge the data back into a desired printable list by going through the steps again.
19. Close the merged file.
20. You will be back at the mail merge template.
21. Click **File**, and select **Save As**.
22. Choose a desired folder where you want to save the template, and down in the **Filename** field, type a name for the template. Name it something like **Mail Merge Letter Template** so you can use it in the future for other letter mail merges.

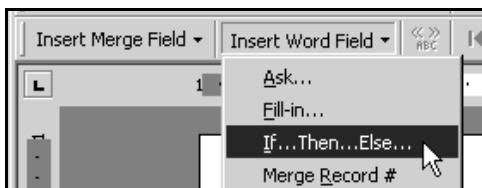
## Advanced Tips

This section provides extra tips you may find useful while working with the mail merge feature in Word. These are not required for a successful merge of customer data to letters.

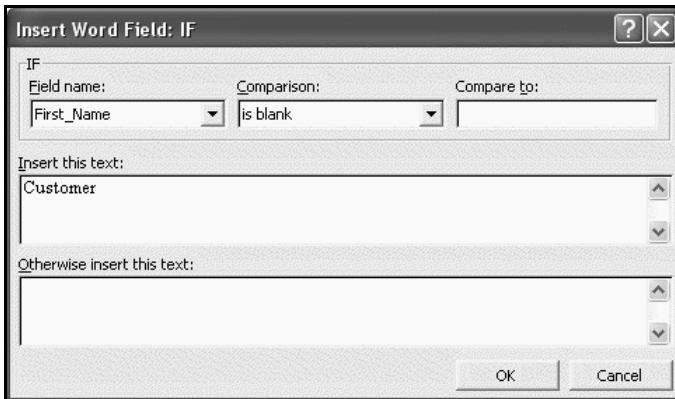
**Label advice:** Insert the <<Full\_Name>> field only in the first line of any address entry of the customer.

**Letter advice:** Sometimes First\_Names are left blank in the customer record. Use the following steps to compensate for that.

- After the word “Dear” in your form letter, click **Insert Word Field** on the mail merge toolbar, and select **If...Then...Else**.



- Make the Insert Word Field: IF dialog box look like the following example, and click **OK**.



- In your form letter, insert the <<First\_Name>> field in the form letter after the conditional IF statement you just created by using the **Insert Merge Field** button.
- Click **Merge** on the mail merge toolbar.
- Click **Merge** on the Merge dialog box that appears.

**Tip:** After the form letters for each customer are created, you can type custom information on any of these generated letters. For example, you could add, “I enjoyed speaking with you last Monday. It was good see you back in the store.”

- After the form letters are merged, print all or the desired letters as necessary. There is no need to save this Word document of form letters. There is no need to since you can always re-merge the data back into a desired printable list by going through the steps again.