



Autosoft
FLEXTM
DMS
and Chrysler 5300

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5300 Project Overview

The Autosoft Dealer Management System Parts Inventory module fully integrates with the 5300 Mopar® Dealer Integrated Inventory Management Project. You will use the Autosoft FLEX DMS Parts Inventory module as you normally do. The Autosoft FLEX DMS program automatically creates transaction files necessary for processing and transmitting to Chrysler and electronically shares information with your in-house system and DealerCONNECT®, so you do not have to re-enter information.

This integration allows you to send part information to Chrysler for the 5300 Project and to receive suggested parts return documents from Chrysler. Before this can happen, you must enter setup parameters that tell the DMS system that you participate in the 5300 Project so it can gather and send the appropriate information.

5300 Project Setup

You must complete the following setup instructions to set your Autosoft FLEX DMS system for your participation in the 5300 Project.

1. Click **Setup & Updates** on the Parts Inventory menu.
2. Click **Operating Defaults** on the System Setup & Updates menu.
3. The Miscellaneous Parts Parameters screen opens; the cursor rests in the **OEM Source Name** field.
4. Press ENTER to advance to the **Manufacturer Code** field. Verify a **CH** for Chrysler appears in this field, and press ENTER.
5. The Chrysler 5300 Project screen opens.
6. Type **Y** to indicate you participate in the 5300 project. You *must* Type a **Y** to indicate you participate in the 5300 project in order to activate the Autosoft DCID/5300 Utilities program to automatically collect the appropriate information from your system and transfer it to Chrysler.
7. Next, type **Y** for yes or **N** for no to indicate if you participate in 5300 forecasting.
8. Next, type **Y** for yes or **N** for no to indicate if you participate in 5300 ARO Daily Orders. The screen closes itself once you fill in this field.

Chrysler 5300 Project

Do You Participate In The Chrysler 5300 Project (Y/N): Y

Do You Participate In 5300 Forecasting (Y/N): Y

Do You Participate In 5300 ARO Daily Orders (Y/N): Y

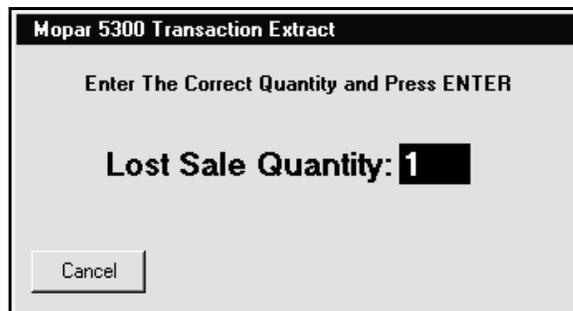
9. Click **Save** to save changes on the Miscellaneous Parts Parameters screen.
10. Click **OK** when prompted that you must set parameters for each inventory source.
11. Click **Exit** to close the screen.
12. Click **Exit** to close the System Setup & Updates menu.

5300 Inventory Extract

Based on the parameter indicating you participate in the 5300 Project, the Autosoft DCID/5300 Utilities program extracts data from your master inventory in the Autosoft FLEX DMS system in order to support the 5300 Part Locator and Dealer Referral initiatives. The Autosoft DCID/5300 Utilities processes the extracted files and transfers them to DealerCONNECT. The Forecasting and Optimization system uses the information to determine stock status and the best stocking level of the dealer inventory.

5300 Transaction Extract

The Counter Parts Sales and Service Parts Sales screens in the Autosoft FLEX DMS Parts Inventory module allow you to complete the Mopar 5300 Transaction Extract information at the time of a sale. When you log a lost sale, you indicate the lost sale quantity on the Mopar 5300 Transaction Extract screen. The Autosoft FLEX DMS system uses this information and the information in the **Fill Ratio** fields to determine whether the customer's request can be satisfied from existing inventory and to determine the actual demand for the part. During the Daily Sales Update, Autosoft FLEX DMS transfers the information to the Autosoft DCID/5300 Utilities. After 9:00 p.m. EST, Autosoft DCID/5300 Utilities sends the information to DealerCONNECT.



Mopar 5300 Transaction Extract

Enter The Correct Quantity and Press ENTER

Lost Sale Quantity: 1

Cancel

Entering Extract Information

1. If you enter a quantity larger than the on-hand quantity for a part, the system displays a “Click Here NOW For lost Sale” message. Click on the message, or press ALT + F7 to log the lost sale. The Mopar 5300 Transaction Extract screen opens.
2. Type the lost sale quantity (the quantity you are short), and press ENTER. The screen closes when you enter the quantity.
3. The **Quantity Requested** field on the Counter Parts Sales screen or Service R/O Parts screen automatically defaults to the sold quantity. Edit the requested value as needed.
4. Use the **Filled From Shelf** field to indicate if you were able to fill the request from the inventory on your shelves. Type **Y** for yes or **N** for no.
5. Use the **Filled Same Day** field to indicate if you were able to fill the request on the same day. Type **Y** for yes or **N** for no. **Y** indicates you fulfilled the request by other means (outside purchase, etc.).
6. Click **Save** to save the information and to return to the Sales screen.
7. Close the counter ticket or repair order as you normally do.

5300 Inventory Forecasting

The Autosoft FLEX DMS Parts Inventory Resupply feature allows you set extensive resupply parameters that assist with parts ordering, part phase in, and part phase out. Chrysler provides additional assistance to help ensure dealers maintain the correct inventory. 5300 Inventory Forecasting allows Chrysler to develop resupply parameters specific to your dealership’s inventory needs.

In order to participate in Inventory Forecasting, you must type **Y** to indicate you participate in 5300 forecasting on the Chrysler 5300 Project screen in the Miscellaneous Parts Parameters. Based on your participation in 5300 forecasting, Autosoft DCID/5300 Utilities automatically transfers Inventory and transaction information from Autosoft FLEX DMS to Chrysler. Chrysler reviews the information and looks at the demand and usage for each part in your inventory. Based on this information, Chrysler determines the best stocking level, reorder point, and stocking status for each part. Chrysler transfers the parameters to your Autosoft FLEX DMS system, and the Autosoft FLEX DMS the system applies the parameters and uses them for future parts resupply.

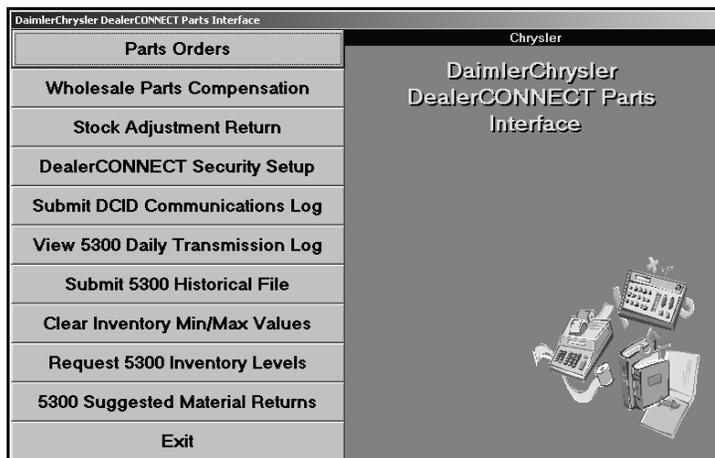
At any time, you can click **Request 5300 Inventory Levels** on the Chrysler DealerCONNECT menu to request an inventory levels report from Chrysler. This retrieves the minimum and maximum stocking values suggested by Chrysler and adds them to the OEM Forecast section on the master Inventory screen. The update may also edit the Stock Status of parts. You are prompted that all workstations must be out of the Parts module during the inventory levels update. Verify all other workstations are out of Parts, and click **OK** to continue.

5300 Suggested Material Returns

Chrysler dealers generate return lists using the Parts Returns feature in the Autosoft FLEX DMS Parts Inventory module. Once you generate the return document, you submit it to Chrysler using the DealerCONNECT Parts Interface utility. Chrysler reviews the return request and sends an approved return file to your DealerCONNECT server. The Autosoft DCID/5300 Utilities program retrieves the approved return file, reformats it to conform to the data requirements in the Autosoft FLEX DMS Parts Inventory module, and saves it to the working directory of the Autosoft FLEX DMS program. You use the Chrysler 5300 SMR menu to pull the approved return document from DealerCONNECT. You can then print it, verify it against your inventory, edit it, and update it to your inventory.

Accessing the Chrysler 5300 SMR Menu

1. Click **Resupply & Returns** on the Parts Inventory menu.
2. Click Chrysler DealerCONNECT. The Chrysler DealerCONNECT Parts Interface menu appears.

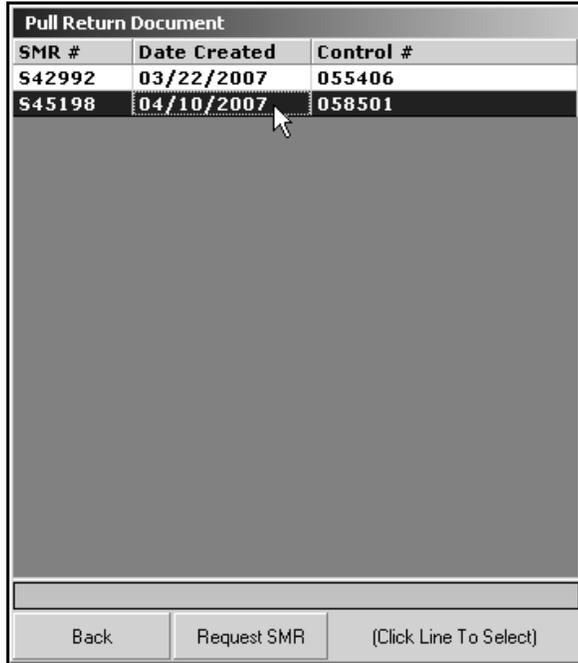


3. Click **5300 Suggested Materials Returns**. The Daimler Chrysler 5300 SMR menu opens.



Pulling Suggested Returns From DealerCONNECT

1. Click **Pull Suggested Return From DCID** to pull the suggested return document. The screen displays a list of return documents from DealerCONNECT.
2. Click the document in the list you want to pull.



SMR #	Date Created	Control #
S42992	03/22/2007	055406
S45198	04/10/2007	058501

Back Request SMR (Click Line To Select)

3. Click **Pull** when prompted to verify you want to pull the file.

Tip: You can view a list of parts and the return quantity right from the Pull Return Document screen. Click the document you want to view, and click **View Only** when prompted to verify you want to pull the file. This allows you to view the parts on a list before pulling the list.

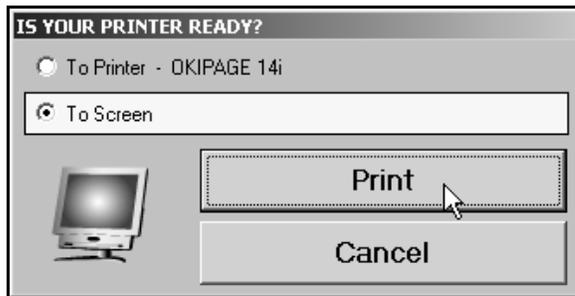
Printing the Suggested Material Return

You can print the suggested return document as needed. The printout provides additional information that is not available when you select to view the document using the **View Suggested Material Return** button on the menu. For each part on the return document, the printout lists the part number, description, base, suggested return quantity, cost, extension, on-hand quantity, and bin. The end of the printout lists the total number of parts on the return document and the total value of the parts.

1. Click **Print Suggested Material Return**.
2. The **Document Number** field defaults to the SMR document number you pulled from DealerCONNECT. Type a different document number if necessary.



3. When prompted to verify your printer is ready, select **To Printer** to print the information or **To Screen** to view the information on your screen.
4. Once you select your print type, click **Print**.



Verifying the Suggested Return Against Your Inventory

You can print a report that lists any discrepancies between the return document and your Master Inventory. You can use the report to further edit the return document. For each part on the return document, the printout lists the part number, description, bin, suggested return quantity, and on-hand quantity.

1. Click **Verify Suggested Return To Inventory**.
2. The **Document Number** field defaults to the SMR document number you pulled from DealerCONNECT. Type a different document number if necessary.
3. When prompted to verify your printer is ready, select **To Printer** to print the information or **To Screen** to view the information on your screen.
4. Once you select your print type, click **Print**.

Printing a List of Active SMR's

At any time, you can print a list of the active return documents in the system that *have not been updated* to inventory. The printout lists the document number and the document's creation date.

1. Click **Print List Of Active SMR's**.
2. When prompted to verify your printer is ready, select **To Printer** to print the information or **To Screen** to view the information on your screen.
3. Once you select your print type, click **Print**.

Viewing the Suggested Material Return

Once you pull the document, you can view it on your screen at any time. You simply specify the document you want to view. The screen displays the parts on the document in part number order. For each part on the return document, the screen lists the part number, inventory source for the part, return document date, suggested return quantity, part description, and the dealer pack code (control number) for the PDC where you send the part.

1. Click **View Suggested Return To Inventory**.
2. The **View Return Document** field defaults to the SMR document number you pulled from DealerCONNECT. Press ENTER to view the parts on this list.
3. If you want to view a different SMR, type the return document number, or click **Document List** to select the document from a list of available SMR files.
4. The screen displays a list of parts on the return document.

Part Number	Src	Date	Ret.	Description	Control
1302807		04/10/07	1		058501
1407748		04/10/07	4		058501
1686198		04/10/07	5		058501
1737725		04/10/07	4	BUSHING	058501
2072614		04/10/07	6	PLUG	058501
273912		04/10/07	1		058501
3454221		04/10/07	5		058502
3492669		04/10/07	5		058501
3575333		04/10/07	3	GROMMET	058501
3637720		04/10/07	1		058501
3641576		04/10/07	4		058501
3723859		04/10/07	2		058501
3748268		04/10/07	2		058501
3781830		04/10/07	1	520798800A	058501
3799062		04/10/07	4	TEE	058501
3799682		04/10/07	1		058501
3799695		04/10/07	2		058501
3799721		04/10/07	7		058501
3828623		04/10/07	6		058501
3847081		04/10/07	9	GASKET	058501
3849730		04/10/07	2	GASKET	058502
3868549		04/10/07	1	SPRING	058501
3868789		04/10/07	1		058501
3880830		04/10/07	7		058501
3893557		04/10/07	1	SEAL	058501
4052509		04/10/07	2		058502
4054098		04/10/07	1	BUTTON	058501

Exit Documents List View Return Document: 545198

5. Click **Exit** to return to the Chrysler 5300 SMR menu.

Editing the Suggested Material Return

Once you pull the suggested return document, you edit any discrepancies between the approved return and your inventory. You can modify the return quantity for parts or add parts to the document.

Editing the Return Quantity

1. Click **Edit Suggested Material Return**.
2. The window on the right side of the screen displays a list of return documents.
3. Click on the return document you want to edit.

4. The window on the right side of the screen displays a list of the parts on the return document, and the information for the first part in the list automatically fills in on the left side of the screen.
5. Click on the part you want to select, or click **Prev** and **Next** to scroll through the list of parts.

6. Edit the return quantity as needed, and press the TAB key.
7. The part information is saved, and the information for the next part in the list fills in on the screen. Continue to edit quantities as needed.
8. When you are finished, click **Exit** to close the screen.

Adding a Part to the List

1. Type the part number, and press ENTER.
2. The part information fills in on the screen.
3. The cursor advances to the **Return Quantity** field. Type the return quantity, and press ENTER again.
4. The part information is saved, and the part is added to the list on the right side of the screen.

Deleting a Part from the List

1. Select the part from the list.
2. Click **Delete Part**.
3. Click **OK** when prompted to verify you want to delete the record.

Updating the Return To Inventory

When you are finished editing the return document, you update the return document to your inventory. You have the option of flagging the returned parts as “Returned” or deleting the files for the returned parts.

1. Click **Update Return To Inventory**.
2. Specify if you want to retain the part record and flag the part as “Returned” or if you want to delete the part record. Type **F** to flag the part or **D** to delete the part.



Verify Suggested Return To Inventory

Flag Part/Delete Part:

SMR:

Control:

If you type **F** for flag part record, the on-hand quantity is relieved by the return quantity, and the stocking status is set to R (Returned) for each part.

If you type **D** for delete record, the inventory record and all of the data associated with it will be removed from the Master Inventory file. If you have returned less than the on-hand quantity, only the return quantity is deducted for each part, and its inventory remains in place.

3. The **SMR** field should automatically default to the SMR you pulled from DealerCONNECT. If this field does not automatically fill in for you, type the document number for the SMR you want to update to inventory.
4. The **Control** defaults to “ALL.” Leave this entry to update all of the parts on the list for all Parts Distribution Centers, or type the control number (PDC number) to update just the parts for the specified PDC.
5. Click **OK** when prompted to verify you want to update the inventory.

5300 Cycle Counting

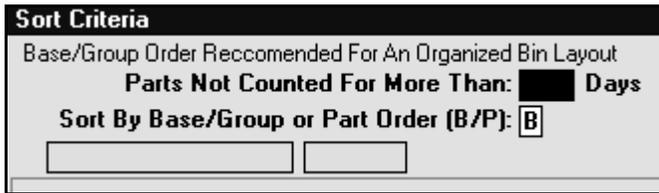
Cycle counting helps dealers maintain accurate on-hand quantities. Chrysler recommends dealers perform a full physical inventory at least once a year. Between the full inventory counts, dealers should perform cycle counts at least once a week to ensure accurate inventory records. The requirement ensures the integrity of the parts data in the Central Dealer Information Database. The objective of this requirement in the 5300 Project is to produce a parts locator and referral system that allows dealers to locate and order parts from Mopar and other dealers.

The Autosoft FLEX DMS Parts Inventory Cycle Inventory module offers Mopar 5300 participants a supplemental feature to help generate cycle inventory lists. The feature allows you to generate a parts list based on the percentage of the total inventory.

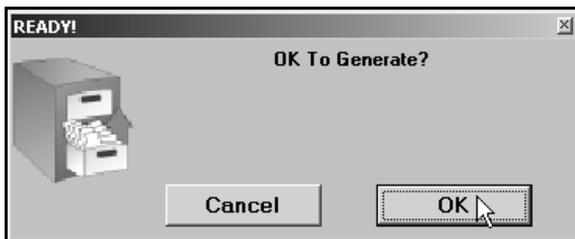
Generating the List

1. Click **Special Inventories** on the Parts Inventory menu.
2. Click **Cycle Inventory**.
3. Click **Generate New List**.
4. Click **Random List for % of Inventory**.
5. Type the percentage you want to use to generate the list. Chrysler recommends you generate a list based on 2%-4% of your total inventory on a daily or weekly basis.

6. The Sort Criteria dialog box opens.



7. In **Parts Not Counted For More Than [] Days**, type the number of days since the part has been counted.
8. Use the **Sort Base/Group or Part Order** field to indicate the sort order you want to use. Type **B** for base order or **P** for part order. We recommend you sort the list base/group.
9. Click **OK** when prompted to verify you want to generate the list.



Once you generate the cycle list, you use it as you normally do for cycle counting. You will follow the basic steps listed below to complete the cycle inventory. The Autosoft DCID/5300 Utilities program transfers the inventory information to Chrysler.

1. After generating your cycle list, print the Bin Count sheets. Use these sheets to record the on-hand quantities for the inventory you count.
2. Enter the inventory counts into Autosoft FLEX DMS.
3. Enter any "add on" parts you had in stock that did not appear on the generated list.
4. Print any variance reports you want to review.
5. Update the physical inventory to your master inventory.

Parts Supersession Files

A supersession file holds a list of parts that have changed from one part number to another. The process begins after you successfully complete the Parts Price Tape download at the beginning of the month (Setup & Updates>Price Tape Updates>Update To Manufacturer's Price Tape). After the update, the Parts Manager needs to decide whether to print the "Print Number Changes From Last Price Tape" list or the "Print Price & Number Changes From Price Tape" list. Both of these lists will provide a list of part numbers that have changed and provide the parts manager the opportunity to decide the next course of action for those parts that have changed numbers.

Then, the Parts Manager will need to process the supersession information using the Parts Number Change menu (Setup & Updates>Part Number Changes). The first three buttons on this menu allow changes to the parts individually. The **Move ALL Data From Changes On Last Tape** option allows you to process all the supersession information for all the changed parts at one time instead of having to review each part number and change it individually. This process flags the superceded parts with a stock status of C.

For Chrysler dealers who participate in the 5300 program, the DCID 5300 adds all parts with a stock status of C and an on-hand quantity of 0 (zero) to a list. This list of parts is sent in the Supersession file to DCID 5300 through the Autosoft DCID 5300 program. When this file is missing or corrupted, Mopar will contact you and/or your Autosoft 5300support personnel for resolution.

Conclusion

This completes the instructions for the Autosoft 5300 program. Refer to these instructions each time you need to use this feature. As always, if you have any questions that this manual does not answer, or if you receive errors while using the program, you can call the Autosoft Support Desk at (800) 473-4630.

