Autosoft **FLEX**™ **DMS**

Dealer-FX/wiADVISOR Integration

Autosoft
Dealer Management System™

FLEX DMS and Dealer-FX/wiADVISOR

FLEX DMS Service integrates with Dealer-FX/wiADVISOR so you can import repair orders from Dealer-FX/wiADVISOR to your Autosoft system. The integration means you can pull the data and have the repair orders available with minimal editing in FLEX DMS.

Verifying Advisor and Technician Setup

The Service Advisor and Technician setup in the FLEX DMS Service Writing module must match the Service Advisors and Technicians entered for your dealership in Dealer-FX/wiADVISOR. Information sent from your FLEX DMS to Dealer-FX will include the employee ID and name for the Service Advisor and Technician assigned to the repair order. When repair order data is pushed from Dealer-FX/wiADVISOR to your FLEX DMS and the employee IDs received do not match any IDs in the FLEX DMS setup, you will be forced to edit the information. Also, any discrepancy between the IDs in the two systems will cause inaccurate reports.

1. Click **Service** on the FLEX DMS main menu.

1. Click **System Setup** on the Service Writing menu.

2. Click **Service Advisors/Writers** on the System Setup menu. The Advisor/Writer Information screen appears.

3. The column on the right side of the screen displays all of the Service Advisors and Writers in the system. Verify that the two-digit Advisor/Write Number assigned to each Advisor/Writer matches the Employee ID assigned to the Advisor/Writer in Dealer-FX/wiADVISOR. If it does not match, edit the ID as needed.

4. When you are finished, click **Exit** to return to the System Setup menu.

5. Next, click **Service Technicians**. The Technician Information screen appears.

6. The column on the right side of the screen displays all of the Service Technicians in the system. Verify the two-digit Technician Number assigned to each Technician matches the Employee ID assigned to the Technician in Dealer-FX/wiADVISOR. If it does not match, edit the ID as needed.

7. When you are finished, click **Exit** to return to the System Setup menu.

Verifying Service Codes

In order for FLEX DMS to properly import repair orders from Dealer-FX/wiADVISOR, you must ensure that the menu codes in your Menu Code setup in Service match the menu codes available on Dealer-FX/wiADVISOR. This allows the DMS to properly import each repair for the repair order. If the codes do not match, the DMS will not be able to process the repair data properly, and you will have to clean up the imported repair order as needed.

1. Click **Service**

2. Click **System Setup**.

3. Click **Enter Service Menu Operations**.

4. Add or edit codes as needed so they match the menu codes used on the Dealer-FX/wiADVISOR Website.

Verifying Tax Rates/Cost Codes

To ensure that time will accurately transfer from Dealer-FX/wiADVISOR to Autosoft FLEX DMS, it is important to verify that the **Labor Units Per Hour** field in the Tax Rates/Cost Codes setup is set to 10. Using 6 labor units per hour will cause discrepancies between Dealer-FX/wiADVISOR and Autosoft and may require you to edit time in the Autosoft system.

1. Click **Service** on the DMS main menu.

2. Click **System Setup** on the Service Writing main menu.

3. Click **Tax Rates/Cost Codes**.

4. Ensure that the **Labor Units Per Hour** field in the **Labor Defaults** area is set to 10. If it is, click **Cancel**. If it is set to 6, change it to 10 and click **Save**.

Importing an RO

1. Click **Service** on the DMS main menu.

2. Click **Repair Orders** on the Service Writing main menu.

3. Click **Start Repair Order**.

4. Click **Import**.

5. A list of repair orders from Dealer-FX displays.

6.   Click the repair order you want to import, and click **Select**.

Tip: Click **Refresh** to refresh the list to ensure you have all the available repair orders from Dealer-FX/wiADVISOR.

7.   The information pulls to the repair order screens.

8.   Advance through the screens and edit the information or add additional information as needed.

Deleting an RO

1. Click **Import**.

2. A list of repair orders from Dealer-FX displays.

3. Click the repair order you want to remove, and click **Delete**.

4. Click **Yes** when prompted to verify you want to delete the RO.