



**Autosoft**  
**FLEX**<sup>TM</sup>

**DMS**  
Ford  
Dealer Principal  
User Guide

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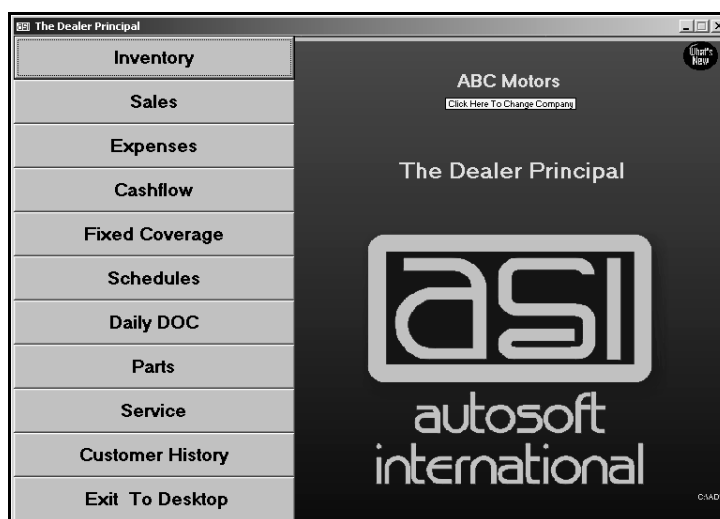
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## Introduction The Dealer Principal

The Dealer Principal is a program that integrates with the Autosoft DMS system. The Dealer Principal allows you to view information (inventory, expenses, etc.) without having to access the information in the Autosoft DMS system. This keeps the information you need at your fingertips.



This manual walks you through setting up and using the Dealer Principal program. Although the program is easy to use, you should keep this manual close so you can reference it as needed until you are familiar with the program.

The remainder of the Introduction identifies each chapter in this manual and the information the chapter covers. Review the information so you know what to expect as you read the manual.

### Chapter 1 System Setup

Before you begin using the Dealer Principal program, you must verify that your general ledger accounts in the Autosoft DMS system are set up correctly, and you must enter setup parameters in the Dealer Principal program for Expenses, Cash Flow, and Fixed Coverage.

### Chapter 2 Inventory

This chapter explains how to use each of the four options on the Inventory menu to view your dealership's inventory. The options allow you to view the information and internals for a specific vehicle, compare the inventory and floorplan for new and used vehicles, view a summary analysis of your used inventory, and view a summary analysis of your new inventory.

### Chapter 3 Sales

This chapter explains how to use each of the six options on the Vehicle Sales menu to view and print sales information. In addition to viewing and printing the current month's sales summary report, you can view the sales for a specific month and select to view sales based on vehicle, salesman, or make/model.

### Chapter 4 Expenses

This chapter explains how to use the Expenses menu to view your dealership's expenses. The menu contains five options for viewing and printing expense information. You can view the expenses for a

specific month, and you can view expense comparisons for the current year and last year. You can also view the check register.

### **Chapter 5 Cash Flow**

This chapter explains how to view the dealership's available cash flow and equity.

### **Chapter 6 Fixed Coverage**

This chapter explains how to view the fixed coverage for the current month and last 12 months.

### **Chapter 7 Schedules**

This chapter explains how to view information for your scheduled accounts.

### **Chapter 8 Daily DOC**

This chapter explains how to view the information for any DOC's set up in the Accounting module in the Autosoft DMS system.

### **Chapter 9 Parts**

This chapter explains how to view an aged analysis of your physical inventory and how to print month-end analysis and performance trend reports.

### **Chapter 10 Service**

This chapter explains how to view a summary of the open repair orders. You will also learn how to print an effective rate report and writer and technician statistics.

### **Chapter 11 Customer History**

This chapter explains how to view and edit customers' service history.

**Tip:** If you have multiple companies, and therefore have two Autosoft DMS icons on your desktop, you will only have one Dealer Principal icon. The information in the Dealer Principal program comes from the Autosoft DMS program last opened. For example, if you have a Ford company and a GM company, you will have an Autosoft DMS icon for Ford and one for GM. If you want to look at the Dealer Principal for the Ford company, you must first open the Ford Autosoft DMS program and go in Accounting, and vice versa for GM.

## **Using F1 Help**

To keep our documentation updated, and our users informed, we have added individual help pages to each screen in the program. Press F1 to display the help page for the current screen or menu. Each page provides the following pieces of information:

- A description of the screen,
- Basic instructions for using the screen,
- A list of the fields on the screen and an explanation of the information required in each field,
- A list of the buttons on the screen and instructions for using each button, and
- A list of the function keys that can be used to carry out commands on the screen.

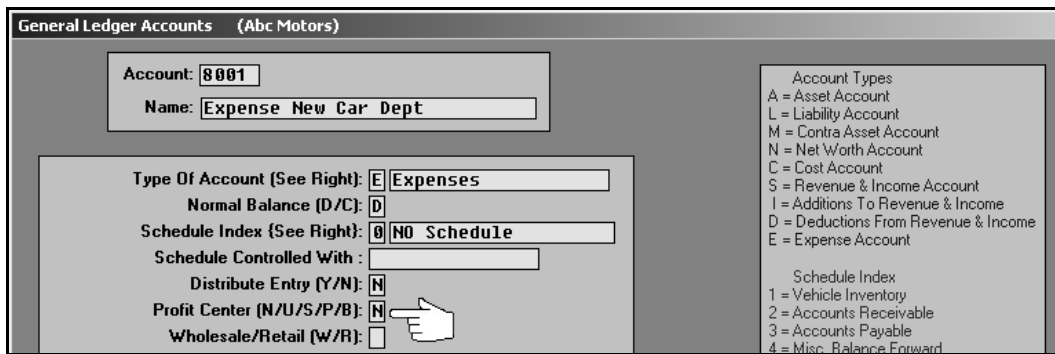
These help pages are updated as changes are made to the program and added to your system when you run an update from the Internet; thus, the help pages are always current. You should become familiar with the help page feature and use it to learn about the new information added to the program and to quickly access information while you are on a screen.

## Chapter 1 System Setup

Before you can use the Dealer Principal program, you will need to verify that your general ledger accounts in the Autosoft DMS program are set up correctly. Once you have verified that information, you will need to set some parameters in the Dealer Principal program. These parameters determine how information is pulled from the Autosoft DMS system and displayed in the Dealer Principal program.

### Verifying the General Ledger Setup in Accounting

You should run a chart of accounts from the General Ledger Setup menu in the Accounting Setup of the Autosoft DMS program to verify that all of your accounts are properly marked. (Click **Accounting**→**Setup**→**General Ledger**→**Print Chart of Accounts**.) Your expense accounts should have a profit center marked in order to pull correctly to the reports in the Dealer Principal. The profit centers are indicated on the General Ledger Accounts setup screen accessed by clicking **Enter G/L Account Information** on the General Ledger Setup menu.



The screenshot shows the 'General Ledger Accounts' setup screen for 'Expense New Car Dept'. The account number is 8001. The 'Type Of Account' is set to 'E Expenses'. The 'Normal Balance (D/C)' is 'D'. The 'Schedule Index' is '0 NO Schedule'. The 'Distribute Entry (Y/N)' is 'N'. The 'Profit Center (N/U/S/P/B)' is 'N', which is highlighted by a mouse cursor. The 'Wholesale/Retail (W/R)' is an empty checkbox. On the right side, there is a legend for 'Account Types' and 'Schedule Index'.

Account Types	
A	= Asset Account
L	= Liability Account
M	= Contra Asset Account
N	= Net Worth Account
C	= Cost Account
S	= Revenue & Income Account
I	= Additions To Revenue & Income
D	= Deductions From Revenue & Income
E	= Expense Account

Schedule Index	
1	= Vehicle Inventory
2	= Accounts Receivable
3	= Accounts Payable
4	= Misc. Balance Forward

Below is a list of the possible profit centers:

- **N** for New
- **U** for Used
- **S** for Service
- **P** for Parts
- **B** for Body Shop
- **F** for Fixed or Administration.

You must also mark your Voids account and your Memo account with an **F** and your Distribution accounts with a profit center of **D**, or you will receive a message in the Expense section of the Dealer Principal indicating that not all of the expenses have a profit center marked.

In order to view the expense totals in the Dealer Principal, you must have an **S** in the **Account Group Totals (S/T)** field for the first expense account of a series and a **T** for the last account in the series. The grouped accounts must be in numeric/alpha order to work properly. These accounts and all of the accounts in between will be totaled.

For example, your first expense account (7000) should have an **S** in the **Account Group Totals (S/T)** field, and the other accounts after it should have blank **Account Group Totals (S/T)** fields. The last expense account (8900) should have a **T** in the **Account Group Totals (S/T)** field.

## Opening the Dealer Principal Program

Once you have verified that the general ledger accounts are set up correctly, you are ready to begin setting up the Dealer Principal program.

1. Double-click the **Dealer Principal** icon on your desktop.



2. The Dealer Principal program opens. You will be at the main menu.



**Tip:** If a password is required for the Accounting module in Autosoft DMS, the Dealer Principal program will automatically be set up with the Accounting password. You will be prompted for the password before the Dealer Principal program opens.



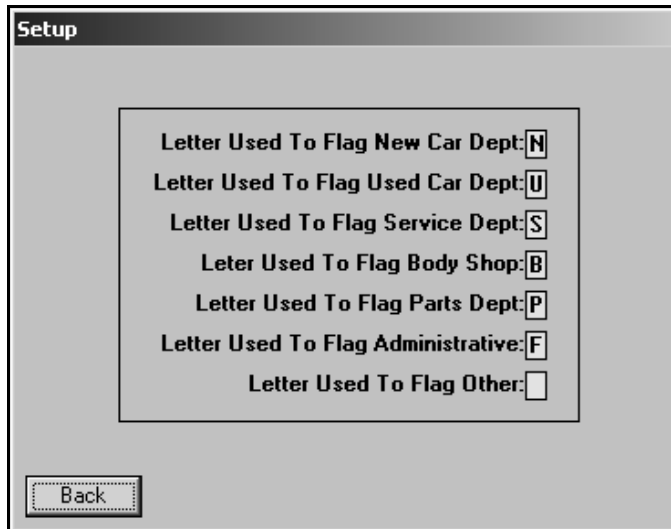
## Setting Dealer Principal Parameters

Before you can use the Dealer Principal program, you need to enter setup parameters that determine how information is pulled from the Autosoft DMS system. These parameters ensure you are viewing the information you want to view. You need to enter parameters for Expenses, Cash Flow, and Fixed Coverage.

### Expenses

You need to enter setup information to indicate the letters used to flag each department. The system uses this setup to compile the expense information.

1. Click **Expenses** on the Dealer Principal menu.
2. Click **Setup** on the Expenses menu. The Setup screen opens.
3. Indicate the letter used to flag each department listed.
  - **N** for New Car Department
  - **U** for Used Car Department
  - **S** for Service Department
  - **B** for Body Shop
  - **P** for Parts
  - **F** for Administration
4. Use the **Other** field if you have set up another department in your dealership that you keep separately with its own sales, expenses, etc. (for example, Transdrive Transmission Department).



The screenshot shows a window titled "Setup" with a list of departments and their corresponding flag letters. The list is as follows:

Letter Used To Flag New Car Dept:	N
Letter Used To Flag Used Car Dept:	U
Letter Used To Flag Service Dept:	S
Letter Used To Flag Body Shop:	B
Letter Used To Flag Parts Dept:	P
Letter Used To Flag Administrative:	F
Letter Used To Flag Other:	

A "Back" button is located at the bottom left of the window.

5. Click **Back** to return to the Expenses menu. The system automatically saves the information entered.
6. Click **Back** on the Expenses menu to return to the Dealer Principal menu.

## Cash Flow

The Cash Flow setup allows you to indicate the general ledger accounts that should pull for each category. The system uses the setup to compile the information displayed on the Cash Flow screen.

1. Click **Cashflow** on the Dealer Principal menu.
2. Click **Setup** on the Cash Flow screen.

Category	Value
Cash In Bank	.00
Cash On Hand (Undeposited)	.00
Contracts In Transit	.00
Trade Accounts Receivable	.00
Factory Receivable - Holdback	.00
Factory Receivable - Other	.00
Miscellaneous Receivables	.00
New Vehicle Inventory	.00
New Vehicle Floorplan	.00
New Vehicle Inventory Equity	.00
Used Vehicle Inventory	.00
Used Vehicle Floorplan	.00
Used Vehicle Inventory Equity	.00
Short Term Payables	.00
Miscellaneous Payables	.00
Available Cash and Equity	.00

3. On the setup screen, type the general ledger account numbers that should pull for each category.

Cash In Bank:	1001	1002							
Cash On Hand:	1000								
Contracts In Transit:	1020								
Trade Receivable:	1120								
Factory A/R Holdback:	1160								
Factory A/R Other:	1135	1140	1170	1171	1185	1190	1195	1200	
Miscellaneous Other A/R:									
Inventory New:	1300	1310							
Floorplan New:	2000								
Inventory Used:	1350	1355	1360	1365					
Floorplan Used:	2010								
Short Term Payables:	2100								
Miscellaneous Payables:	2120	2125	2130	2140					

4. Click **Back** to return to the Cash Flow screen. The system automatically saves the information entered.
5. Click **Exit** on the Cash Flow screen to return to the Dealer Principal menu.

## Fixed Coverage

The Fixed Coverage setup allows you to indicate the general ledger accounts that should pull for Service, Parts, Body Shop, and fixed overhead expenses. The system uses the setup to compile the information displayed on this screen. You should check your franchise accounting manual to obtain the correct general ledger account numbers to enter on this screen for the fixed coverage formula.

1. Click **Fixed Coverage** on the Dealer Principal menu.
2. Click **Setup** on the Fixed Coverage screen.

	Current	12-Months
Service Sales .....	.00	.00
Less Cost .....	.00	.00
Service Gross .....	.00	.00
Parts Sales .....	.00	.00
Parts Cost .....	.00	.00
Parts Gross .....	.00	.00
Body Shop Sales ...	.00	.00
Less Cost .....	.00	.00
Body Shop Gross .....	.00	.00
Total Department Gross .....	.00	.00
Total Fixed Overhead Expense .....	.00	.00
Fixed Coverage .....	00%	00%

Buttons: Exit, Setup, Print

3. On the setup screen, specify the range of general ledger accounts that should pull for each category. Type the first account in the **From** field and the last account in the **To** field.

**Fixed Coverage Setup**

**Service**

Sale Accounts ... From: 5700 To: 5781 Cost Accounts ... From: 6700 To: 6780

From: To: From: To:

**Parts**

Sale Accounts ... From: 5400 To: 5492 Cost Accounts ... From: 6400 To: 6492

From: To: From: To:

**Body Shop**

Sale Accounts ... From: 5800 To: 5850 Cost Accounts ... From: 6800 To: 6850

From: To: From: To:

**Fixed Coverage Expenses**

Expense Accounts ... From: 8020 To: 8026

Expense Accounts ... From: To:

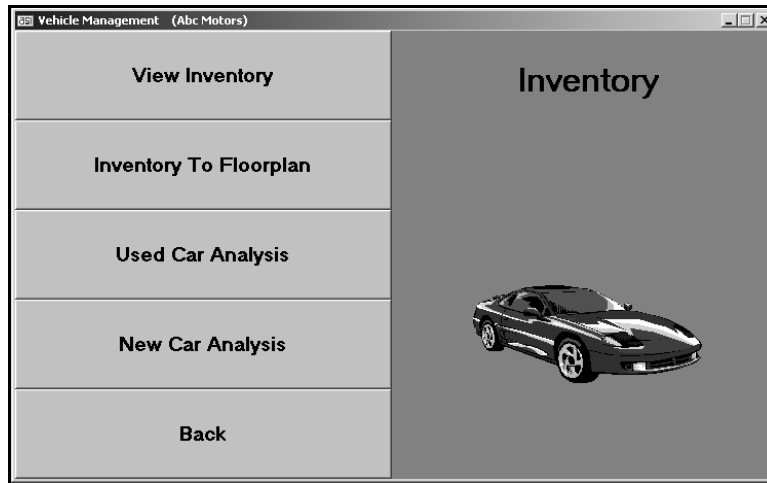
Buttons: Back

4. Click **Back** to return to the Fixed Coverage screen. The system automatically saves the information entered.
5. Click **Exit** on the Fixed Coverage screen to return to the Dealer Principal menu.

Once you have finished entering the parameters, you can begin using the Dealer Principal program. The Dealer Principal menu contains eight options. Each option will be covered in detail in the following chapters.

## Chapter 2 Inventory

When you click the **Inventory** button on the Dealer Principal menu, you advance to the Inventory menu. The menu contains four options for viewing your dealership’s inventory. To select an option, click the button on the menu. The appropriate screen appears.



Button	Use it to
<b>View Inventory</b>	View the information and internals for a specific vehicle
<b>Inventory To Floorplan</b>	Compare the inventory and floorplan for new and used vehicles
<b>Used Car Analysis</b>	View a summary analysis of your used inventory
<b>New Car Analysis</b>	View a summary analysis of your new inventory

## View Inventory

The **View Inventory** button is used to view the information and internals for a specific vehicle. In addition, the system displays all of the postings related to the vehicle. You can click a repair order in the display list to view the R/O detail. You can also view information for the open repair orders for the vehicle.

1. Click **View** Inventory. The View Inventory/Internals screen opens.
2. Type the stock number, and press ENTER.

You can also search for a vehicle by clicking **Inventory**. Use the drop-down list to select the car line for the vehicle. A list of vehicles in the selected car line is displayed. Click the vehicle you want to select. You can use the arrows on each side of the **Inventory** button to scroll through the inventory.

3. The vehicle's information fills in on the screen.
  - The top part of the screen displays the vehicle's information. This information is for viewing only. It cannot be edited on this screen.
  - The middle part of the screen lists all of the postings that relate to the vehicle. You can click a repair order in this list to view the R/O detail.
  - The bottom part of the screen displays any UP's that have been entered for the vehicle.

Vehicle Information (Abc Motors)					
Stock No.:	4F250		Original Inventory:	18023.00	
Year:	2004		Total Of Internals:	64.97	
Make/Model:	FORD	ESCAPE	Pending Internals:	.00	
VIN:	1FMVU0000KA00000		Advertising Group:	.00	
Date In:	04/20/2004	414 Days	Holdback:	.00	
Odom.:	20003		Dealer Pack:	100.00	
Memo:	4x4 AUTO XLT				
Doc.	Date	Jn	Desc.	Db.	Cr.
B425	04/20/04	99	Inception Entry	18023.00	
INCEP	12/31/04	99	Net Internals	64.97	
Logged Up's					
Exit	<	Inventory	>	Info	Pending R/O's
				Print	Clear Screen

4. You can view any open repair orders for the vehicle by clicking **Pending R/O's**. The screen will display the information for the repair order and the estimated total of the pending repairs.
5. Use the **Print** button to print the vehicle information as needed.
6. Click **Exit** to return to the Inventory menu.

## Inventory To Floorplan

The **Inventory To Floorplan** button is used to view a comparison of your inventory and floorplan for new and used vehicles.

1. Click **Inventory To Floorplan**.
2. The information fills in on the screen.

Vehicle/Floor Plan FaStrial	
<b>New Vehicles</b>	
Total Units In Inventory .....	68
Inventory Value .....	1,584,398.64
Inventory Over 55 Days .....	1,584,398.64
Units On Floorplan .....	56
Floorplan .....	1,528,830.49
Floorplan Over 55 Days .....	1,528,830.49
<b>Used Vehicles</b>	
Total Units In Inventory .....	57
Inventory Value .....	692,457.44
Inventory Over 55 Days .....	692,457.44
Units On Floorplan .....	22
Floorplan .....	404,193.38
Floorplan Over 55 Days .....	404,193.38
<input type="button" value="Back"/> <input type="button" value="Exceptions"/> <input type="button" value="Print"/>	

3. Click **Exceptions** to view a list of the exceptions. For each vehicle, it lists the stock number, year, make, serial number, inventory value, floorplan amount, and delivery date.

Vehicle/Floor Plan FaStrial						
Stock	Year	Make	Serial No.	Inventory	Floor Plan	Delivered
5173	2005	FORD	5FENU000000 000215	25811.00 1300	.00	2010
5179	2005	FORD	5FENU000000 000619	26009.00 1360	.00	2000
5180	2005	FORD	5FBBT000000 000729	26843.00 1360	.00	2000
5185	2005	FORD	5FDBA000000 000978	27795.00 1300	.00	2010
5188	2005	FORD	4F1BE000000 000924	36784.00 1360	18392.00	2000
5190	2005	FORD	5FELU000000 000058	25322.00 1360	.00	2000
5191	2005	FORD	4F1BE000000 000174	18524.00 1300	.00	2010
5193	2005	FORD	4F1BF000000 000821	41500.00 1300	20750.00	2010
5194	2005	FORD	4F1BK000000 000220	28892.00 1360	.00	2000
5197	2005	FORD	JFDBR000000 000100	14999.00 1360	.00	2000
5209	2005	FORD	5FBBT000000 000705	54794.00 1310	27397.00	2000
<input type="button" value="Back"/> <input type="button" value="Exceptions"/> <input type="button" value="Print"/>						

4. Click **Back** to return to the Inventory menu.

## Used Car Analysis

The **Used Car Analysis** button is used to view a summary analysis of your used inventory. The drill-down viewing allows you to view details for specific lines and vehicle's within a line.

When you click **Used Car Analysis**, the Inventory Analysis screen opens and automatically displays the analysis. The top line displays the total number of vehicles in your used inventory and the value of the inventory.

The next part of the analysis groups the vehicles by age. It lists the number of vehicles under 60 days old, between 60 and 90 days old, between 90 and 120 days old, and over 120 days old. For each category, the analysis lists the value of the inventory and the percentage of the overall inventory these vehicles make up.

The next part of the analysis groups the vehicles by actual cash value. For each value grouping, the analysis lists the value of the inventory and the percentage of the overall inventory these vehicles make up.

Inventory Analysis (Abc Motors)			
57 Cars	748,101.09		
-----			
By Age			
0 Cars Under 60 Days	.00	.0%	Inventory
0 Cars From 60 To 90 Days	.00	.0%	Inventory
20 Cars From 90 To 120 Days	211004.44	35.1%	Inventory
37 Cars Over 120 Days	537096.65	64.9%	Inventory
-----			
By ACU			
14 Cars Under \$ 5,000	24458.37	24.6%	Inventory
8 Cars From \$ 5,000 To \$ 7,500	50578.22	14.0%	Inventory
1 Cars From \$ 7,500 To \$10,000	8810.22	1.8%	Inventory
6 Cars From \$10,000 To \$12,500	66476.66	10.5%	Inventory
7 Cars From \$12,500 To \$15,000	92141.65	12.3%	Inventory
10 Cars From \$15,000 To \$20,000	174344.57	17.5%	Inventory
11 Cars Over \$20,000	331291.40	19.3%	Inventory
-----			
Back	*Click* Line In List For Details		Print

## Printing the Analysis

Use the **Print** button at the bottom of the screen to print the analysis. The information that prints is the exact information displayed on the screen.

1. Click **Print**.
2. When prompted to verify your printer is ready, click to select **To Printer**.
3. Once you select your print type, click **Print**.



## Viewing the Detail for a Specific Line

Click a line to view the detail. The screen will list all of the vehicles in the selected line. For each vehicle, the system displays the stock number, year, make, model, mileage, VIN, age, original price, total value of any internals, book value, and any memo information entered for the vehicle.

Inventory Analysis (Abc Motors)										
ACU From \$10,000 To \$12,500										
Stock	Yr	Make	Model	Odom	VIN	Age	Original	Internal	Book	Memo
4F10B	03	FORD	TAURUS	8151	270000	462	10732.50	623.67	11356.17	4 dr
4F52B	05	FORD	FOCUS ZX	6072	140006	204	11441.00	49.92	11490.92	
5F11B	04	FORD	FOCUS SE	21843	190006	106	9163.00	.00	9163.00	
5F13B	04	FORD	FOCUS ZX	18454	110004	106	10580.00	.00	10580.00	
4F70B	00	GMC	1500 S/C	72739	310001	115	10000.00	79.49	10079.49	4X4
5F23A	02	MERCUR	MTNEER	77738	J20005	129	11700.00	.00	11700.00	U8

Back \*Click\* Line From List For Details Print

## Viewing the Detail for a Specific Vehicle in a Line

Click a vehicle to view a vehicle's complete information. This opens the View Vehicle screen. This screen displays all of the available information for the vehicle, including a list of the repair orders for the vehicle. Click a repair order in the list to view the detail for the R/O.

View Vehicle	
5F13B 03/01/05 5F13B/110004/Inv 10580.00 .00	
( Click * Line To View R/O Detail )	
Stock No.: 5F13B Line No.: 3A Year: 2004 New Used: U Make: FORD Model Code: Model: FOCUS ZX4 Body: 4 DR VIN: 1FAFP00N00W110004	<div style="border: 1px solid black; padding: 5px;">           Incentives            Customer: <input type="text"/>            Dealer: <input type="text"/> </div> <div style="border: 1px solid black; padding: 5px; margin-top: 5px;">           Options  <input type="text"/> <input type="text"/> <input type="text"/>  <input type="text"/> <input type="text"/> <input type="text"/> </div>
Miles: 18454 Date In: 02/23/05 In Service: 05/15/04 Color: GREY Codes: <input type="text"/> <input type="text"/> Keys: <input type="text"/> <input type="text"/> Memo: <input type="text"/> Prev Owner: <input type="text"/> Title: <input type="text"/>	M.S.R.P.: 14900.00 Dealer Prep: .00 Dealer Pack: 920.00 Invoice: 10580.00 Holdback: .00 Advertising: .00 Pending Repairs: 1.00 ACV: 11500.00 Original: 10580.00 Internals: .00 Book: 10580.00
Exit	

## New Car Analysis

The **New Car Analysis** button is used to view a summary analysis of your new inventory. When you click **New Car Analysis**, the Inventory Analysis screen opens and automatically displays the analysis.

The information is displayed by car line. For each line, the screen lists the total number of vehicles in the line, the total value of the vehicles, the average cost of the vehicles, the total number of vehicles over 60 days old, and the total value of the vehicles that are over 60 days old.

The end of the analysis displays the totals for all of the car lines. Use the scroll bar on the right side of the screen to scroll through the analysis.

Inventory Analysis (Abc Motors)	
Cars For Line 1 NEW CARS	
Total Cars .....	20
Total Value .....	484424.28
Average Per Car .....	24221.21
Cars Over 60 Days .....	20
Value Over 60 Days .....	484424.28
-----	
Cars For Line 2 NEW TRUCKS	
Total Cars .....	40
Total Value .....	1099974.36
Average Per Car .....	27499.36
Cars Over 60 Days .....	40
Value Over 60 Days .....	1099974.36
-----	
Totals For All Lines	
Total Cars .....	60
Total Value .....	1584398.64
Average Per Car .....	26406.64
Cars Over 60 Days .....	60
Value Over 60 Days .....	1584398.64
-----	
Back	Print

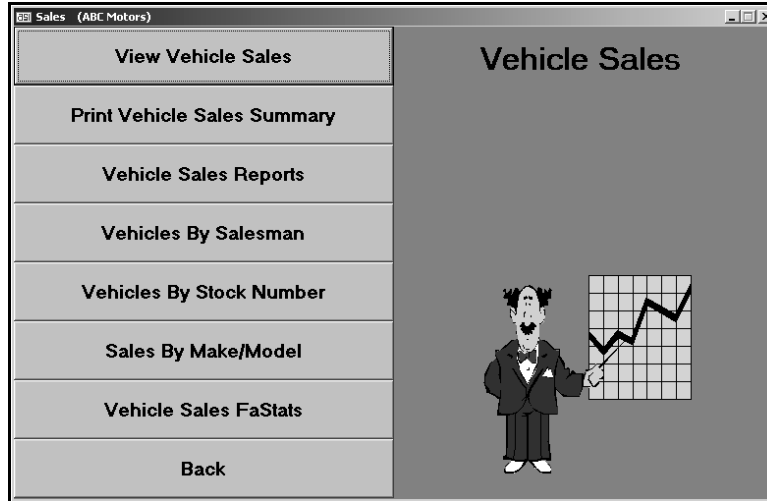
## Printing the Analysis

Use the **Print** button at the bottom of the screen to print the analysis. The information that print is the exact information displayed on the screen.

1. Click **Print**.
2. When prompted to verify your printer is ready, click to select **To Printer**.
3. Once you select your print type, click **Print**.

## Chapter 3 Sales

When you click the **Sales** button on the Dealer Principal menu, you advance to the Vehicle Sales menu. The Vehicle Sales menu is used to view sales information. The menu contains six options for viewing and printing sales information. To select an option, click the button on the menu. The appropriate screen or prompt appears.



Button	Use it to
<b>View Vehicle Sales</b>	View vehicle sales for a specific month
<b>Print Vehicle Sales Summary</b>	Print the current month's sales summary report
<b>Vehicle Sales Reports</b>	Print various vehicle sales reports.
<b>Vehicles By Salesman</b>	View sales information for a specific salesman for a specific month
<b>Vehicles By Stock Number</b>	View the sales information for a specific vehicle
<b>Sales By Make/Model</b>	View the sales information for a specific make and model for a specific month
<b>Vehicle Sales FaStats</b>	View sales statistics for the current month and year-to-date

## View Vehicle Sales

The **View Vehicle Sales** button is used to view sales information for a specific month. You can view all of the sales for the selected month, or you can select to view new vehicle sales, used vehicle sales, wholesale sales, or dealer trades.

1. Click **View Vehicle Sales**.
2. Click the month button at the top of the screen to select the month. The button turns red to indicate it has been selected.
3. Next, click the button that corresponds to the type of sales you want to view.
4. The screen will list all of the sales in the selected category.

View Sales											
JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
New Retail		Fleet	Used Retail	Certified	Wholesale		Dealer Trade		All Sales		
02/02/05	AXEL	L5104	05 LINCOLN	LS	05	ADAM CARTWRIGHT			1648.75		
02/09/05	FRICK	T5115	05 NEW TRUCKS	F150 S/C	02	STEPHEN WILLIAMS			-1078.00		
02/14/05	DELANCEY	T587	05 FORD	F150 S/C	04	SHANNON WRIGHT			1413.70		
02/15/05	AARDN	T5118	05 FORD	EXPED EB	02	STEPHEN WILLIAMS			239.56		
02/15/05	WIB	T5119	05 FORD	EXPL XLT	02	STEPHEN WILLIAMS			1865.35		
02/15/05	LANE	T5120	05 FORD	ESCAPE	05	ADAM CARTWRIGHT			1254.91		
02/15/05	CROTH	T585	05 FORD	ESCAPE XLT	04	SHANNON WRIGHT			1163.42		
02/23/05	SIBER	T574	05 FORD	F150 S/C	01	PETER REED			1886.70		
02/24/05	PRICE	T5125	05 FORD	ESCAPE	01	PETER REED			437.42		
02/25/05	WINE	T5124	05 FORD	F150 S/C	03	ROGER SIERRA			1652.35		
02/28/05	BOYLE	T593	05 FORD	F150 S/C	02	STEPHEN WILLIAMS			1453.13		
11 Vehicles Listed			Average Gross Per Vehicle			1085.21					
4 Units With Backend Income			Average Per Vehicle			68.70					
Backend Penetration .....						36.36%					
(Click Desired Line To View Recap Of Deal)											
Exit		Extended Search		Click Line To Print Recap				Print Current List			

5. Click a line to view detail for that sale.
6. Click **Print Current List** to print the information.
7. 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.
8. Once you select your print type, click **Print**.
9. Click **Exit** to return to the Vehicle Sales menu.

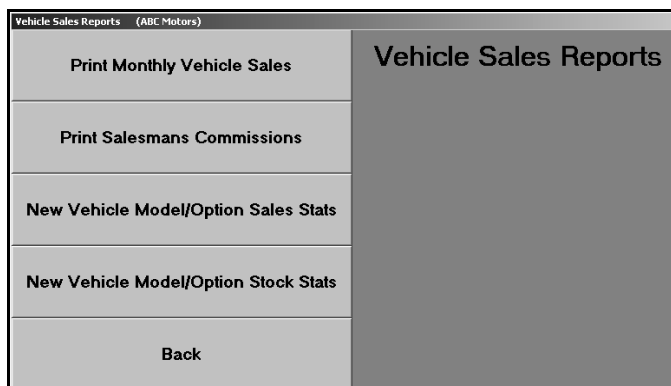
**Tip:** Use the **Extended Search** button to search for a specific sale in history. Type the stock number, the customer's last name/part of the customer's last name, or the last six characters of the VIN. The screen will display the sales that match your search criteria. Click the sale in the list you want to view.

## Print Vehicle Sales Summary

Use the **Print Vehicle Sales Summary** button to print the current month's sales summary report. 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. Once you select your print type, click **Print**.

## Vehicle Sales Reports

The Vehicle Sales Reports button advances you to the Vehicle Sales Reports menu. You use this menu to print vehicle sales reports.



### Print Monthly Vehicle Sales

Use this button to print a vehicle sales report. The report lists the sales by sales type (new vehicles, used vehicles, wholesale, etc.). For each sale, the report lists the sales date, stock number, customer's last name, model year, make, model, salesman code, sale amount, cost, standard gross, commissionable gross, vehicle age, and the return percentage. The return is calculated using the following formula:  $\text{Return} = (\text{Gross} \div \text{Dealer's Cost}) \div (\text{Vehicle Age} \div 365)$ .

The bottom of each section lists the total sales and gross, average annualized return on investment, and the average number of days the vehicles were in inventory. There is also an aging summary that divides the sales into five aging categories (current to 30, 30 to 60, 60 to 90, 90 to 120, and over 120 days) and lists the average gross for each category.

The report also includes an F&I summary. For each sale on the report, the summary lists the total credit life, credit disability, finance reserve, and extended service contract sale amount. The end of the summary lists the total retail deals and the total credit life commission, credit A&H commission, warranty commission, finance reserve, and total overall commission.

1. Click **Print Monthly Vehicle Sales**.
2. Type the number for the salesperson whose commission you want to print, or select the salesperson from the drop-down list. If you want to print the commission for all of the salespeople, select salesperson 00.
3. Specify the dates you want to use for the report.
4. Click **Full** to print a full report (which includes vehicle detail) or **Summary** to print a summary (which includes just the average gross).
5. When prompted to verify your printer is ready, select your print criteria.

## Print Salesmans Commission

Use this button to print a commission report. The report is divided into two parts. First, the report lists all of the sales for the specified date range. For each sale, the report lists the salesman code, sale date, stock number, customer's last name, model year, make, model, and accrued commission. The detailed report also lists the sale amount, cost, standard gross, commissionable gross, gross percentage, and F&I gross for each sale.

The second part of the report is a commission summary for each salesman. The report lists the salesman's number, salesman's name, total commission, commissionable gross, gross percentage, units sold, and the average gross for the sales.

1. Click **Print Salesmans Commission**.
2. Type the number for the salesperson whose commission you want to print, or select the salesperson from the drop-down list. If you want to print the commission for all of the salespeople, select salesperson 00.
3. Indicate if you want to print a short list or detailed list. Type **S** for short or **D** for detailed.
4. Specify the dates you want to use for the report.
5. When prompted to verify your printer is ready, select your print criteria.

## New Vehicle Model/Option Sales Stats

Use this button to print vehicle sales statistics for vehicle models and options. This is based on the car line you specify for the report.

1. Click **New Vehicle Model/Option Sales Stats**.
2. Type the car line you want to use for the report.
3. When prompted to verify your printer is ready, select your print criteria.

## New Vehicle Model/Option Stock Stats

Use this button to print stocking statistics for vehicle models and options. This is based on the car line you specify for the report.

1. Click **New Vehicle Model/Option Sales Stats**.
2. Type the car line you want to use for the report.
3. When prompted to verify your printer is ready, select your print criteria.

## Vehicles By Salesman

The **Vehicles By Salesman** button is used to view sales information for a specific salesman for a specific month.

1. Click **Vehicles By Salesman**. The View Sales screen opens.
2. Click the month button at the top of the screen to select the month. The button for the selected month turns red to indicate it is selected.
3. A list of salesmen fills in on the left side of the screen. Click the salesman you want to select, or click **Total Month Retail** to view a summary of the month's sales for all of the salesmen.
4. The sales information fills in on the screen.

View Sales (Abc Motors)											
JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
01	PETER REED	02/02/05	INDIANA AUTO	L5104	05	LINCOLN	LS				1648.75
02	STEPHEN WILLIAMS	02/03/05	INDIANA AUTO	L4161A	77	MERCURY	G MARQUIS				-176.98
03	ROGER SIERRA	02/03/05	INDIANA AUTO	T4144B	03	CHEVY	CAVALIER				429.61
04	SHANNON WRIGHT	02/03/05	INDIANA AUTO	T457B	89	FORD	RANGER				20.00
05	ADAM CARTWRIGHT	02/03/05	INDIANA AUTO	T555B	91	CHEVROLET	S10				325.00
99	House	02/03/05	INDIANA AUTO	T576B	92	DODGE	2500				595.00
		02/03/05	INDIANA AUTO	T589B	00	FORD	E350 CARGO				-110.00
		02/17/05	INDIANA AUTO	B431A	98	PONTIAC	BUNNEVILLE				680.00
		02/17/05	INDIANA AUTO	R355A	94	FORD	TAURUS				170.00
		02/17/05	INDIANA AUTO	T581B	98	CHEVROLET	3500 S/C				181.50
		02/24/05	NOAH AUTO	T4122A	02	FORD	F150 XLT				-66.60
		02/28/05	INDIANA AUTO	P427A	00	DODGE	DURANGO				-30.85
		02/28/05	KISTLER FORD	T527	05	FORD	F250 S/C				.00
		02/28/05	CARLISLE FORD	T539	05	FORD	F250 CREW				.00
			14 Vehicles Listed	Average Gross Per Vehicle						261.82	
			0 Units With Backend Income.	Average Per Vehicle						.00	
			Backend Penetration	.....						.00%	
<div style="display: flex; justify-content: space-between; align-items: center;"> <span>Back</span> <span>Total Month Retail</span> <span>Print</span> </div>											

5. Use the **Print** button to print the sales information as needed.
6. Click **Exit** to return to the Vehicle Sales menu.

## Vehicles By Stock Number

The **Vehicles By Stock Number** button is used to view sales information for a specific vehicle.

1. Click **Vehicles By Stock Number**. The Sales By Stock Number screen opens.
2. In the **Stock No** field, type the stock number, and press ENTER.

You can also search for a vehicle by clicking **List**. On the List screen, click **This Month** to view a list of sales for the current month, **Last Month** to view a list of sales for the previous month, or **All** to view a list of all of the vehicle sales. Click the sale you want to select.

3. The sale information fills in on the screen.

Sales By Stock Number (Abc Motors)							
Stock No.: 4F45		Buyer: SMITH		Deliv.: 02/09/05			
Document : 4F45		VIN : 1FHZU00K00U800009					
Year : 2004		Make : FORD		Model : EXPLORER			
-----							
Cost Of Sale	4950	19643.00	Sale	3950	21700.00		
Reconditioning	4751	83.69	Inventory	B453	1365	19726.69	
Cash W/Deal	1010	15582.00	Sales Tax		2150	882.00	
Trade Inven.	4F45A	1350	1200.00	Acru. Comm.	04	2411	454.89
Trade (2)	4F45B	1360	5800.00				
Sales Comm.	04	7200	454.89				
-----							
Total Sale			\$	21700.00			
Less Cost			-	19726.69			
-----							
Gross Profit			\$	1973.31			
Less Advertising			-	.00			
Less Holdback/Pack			-	100.00			
-----							
Total Commissionable Gross			\$	1873.31			
-----							
Sales Commission			\$				
Credit Life/ARH Retention			\$	.00			
Warranty Retention			\$	.00			
Finance Retention			\$				
-----							
Total F & I			\$	.00			
-----							
List							
Print							
Back							

4. Use the **Print** button to print the sale information as needed.
5. Click **Back** to return to the Vehicle Sales menu.



## Sales By Make/Model

The **Sales By Make/Model** button is used to view sales information for a specific make and model for a specific month.

1. Click **Sales By Make/Model**. The Retail Sales By Make/Model screen opens.
2. Click the month button at the top of the screen to select the month. The button for the selected month turns red to indicate it is selected.
3. A list of the makes and models fills in on the left side of the screen. Click the make/model you want to select, or click **Total Month Retail** to view a summary of the month's sales for all of the makes/models.
4. The sales information fills in on the screen.

Retail Sales By Make/Model (Abc Motors)											
JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
N FORD	ESCAPE		02/15/05	LANE		T5120	05 FORD		ESCAPE	01	PETER REE
N FORD	ESCAPE XI		02/24/05	PRICE		T5125	05 FORD		ESCAPE	01	PETER REE
N FORD	EXPED EB										
N FORD	EXPL XLT		2 Vehicles Listed			Average Gross Per Vehicle			846.17		
N FORD	F150 S/C										
N LINCOLN	LS		1 Units With Backend Income.			Average Per Vehicle			28.86		
N NEW TRUCKS	F150 S/C										
U CHEVY	Used		Backend Penetration .....						50.00%		
U CHRYSLER	Used										
U FORD	Used										
U LINCOLN	Used										
U MERCURY	Used										
U PONTIAC	Used										

Buttons: Back, Total Month Retail, Print

5. Use the **Print** button to print the sales information as needed.
6. Click **Exit** to return to the Vehicle Sales menu.

## Vehicle Sales FaStats

The **Vehicle Sales FaStats** button is used to view sales statistics for the current month and year-to-date.

1. Click **Vehicle Sales FaStats**. When the Vehicle Sales FaStats screen opens, it automatically displays the sales statistics.

**Vehicle Sales Fastats**  Include Over Allowance In Gross

**Month**

	Units	Sales	Avg. Gross
New	7	197183.55	1629.25
Fleet		.00	.00
Used	14	456187.79	1723.60
Certified Used		.00	.00
Wholesale	11	139987.15	1124.44
Over Allowance		608756.68	

**YTD**

	Units	Sales	Avg. Gross
New	47	1235481.33	518.15
Fleet		.00	.00
Used	43	886548.07	2213.93
Certified Used		.00	.00
Wholesale	22	324084.14	584.51
Over Allowance		2059340.24	

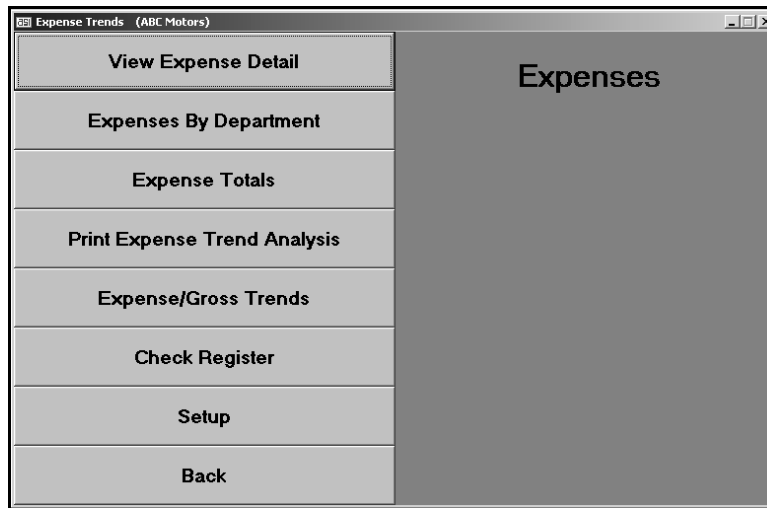
As Posted To The G/L In The Current Month  
"Click" Details To View Accounts

Close
Details

2. Click to select **Include Over Allowance In Gross** if you want to include over allowance in the statistics.
3. Click **Details** to view the general ledger accounts and their balances.
4. Click **Close** to close the Vehicle Sales FaStats

## Chapter 4 Expenses

The **Expenses** button on the Dealer Principal menu opens the Expenses menu. This menu is used to view your dealership's expenses. You can view the expenses for a specific month, and you can view expense comparisons for the current year and previous year. The menu contains six options for viewing and printing expense information. To select an option, click the button on the menu. The appropriate screen or prompt appears.



Button	Use it to
<b>View Expense Detail</b>	View the expenses for a specific month
<b>Expenses By Department</b>	View the expenses for a specific department for a specific month
<b>Expense Totals</b>	View a comparison of your expenses for this year and last year
<b>Print Expense Trend Analysis</b>	Print an expense trend analysis for the past year
<b>Expense/Gross Trends</b>	View a bar graph that identifies the expense and gross trends for this year and last year
<b>Check Register</b>	View the check register

## View Expense Detail

The **View Expense Detail** button is used to view expense detail for a particular month.

1. Click **View Expense Detail**. The View Expenses screen opens.
2. Click the month button at the top of the screen to select the month. The button for the selected month turns red to indicate it is selected.
3. A list of expenses fills in on the left side of the screen. Click an expense to view its detail. The detail fills in on the right side of the screen.

View Expenses (ABC Motors)											
JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
8546	Taxes-Exc RE & Income-B			.00		02/07/05	49.29		(%)OFFICE MAX		
8600	Insurance - Officers' L			.00		02/11/05	7.78		(%)TRUE VALUE	HARDWARE	
8601	Ins - Officers' Life-NE			30.25		02/15/05	23.27		(%)OFFICE MAX		
8602	Ins - Officers' Life-US			30.25		02/15/05	81.08		(%)MODERN PRINTING		
8603	Ins - Officers' Life-PA			18.15		02/15/05	53.99		(%)OFFICE MAX		
8604	Ins - Officers' Life-SE			30.25		02/15/05	21.44		(%)OFFICE MAX		
8606	Ins - Officers' Life-BO			12.10		02/15/05	12.03		(%)OFFICE MAX		
8620	Insur-Exc Building & Em			.00		02/15/05	5.27		(%)OFFICE MAX		
8621	Insur-Exc Build & Empl-			441.17		02/17/05	45.79		(%)OFFICE MAX		
8622	Insur-Exc Build & Empl-			441.17		02/17/05	87.23		(%)SAM'S CLUB		
8623	Insur-Exc Build & Empl-			264.70		02/21/05	6.90		(%)OFFICE MAX		
8624	Insur-Exc Build & Empl-			441.17		02/21/05	6.90		(%)OFFICE MAX		
8626	Insur-Exc Build & Empl-			176.48		02/24/05	2.53		(%)OFFICE MAX		
8640	Office Supplies			.00		02/25/05	111.13		(%)OFFICE MAX		
8641	Office Supplies-NEW			551.53		03/01/05	1.91		(%)OFFICE MAX		
8642	Office Supplies-USED			551.58		02/28/05	4.10		(%)SAM'S CLUB		
8643	Office Supplies-PARTS			367.71		02/28/05	6.60		(%)None Entered)		
8644	Office Supplies-SERVICE			367.66		03/04/05	6.05		(%)OFFICE MAX		
8645	Quick Lane Office Suppl			.00		03/04/05	18.29		(%)OFFICE MAX		
8646	Office Supplies-BODY			.00							
8660	Professional & Service			.00							
8661	Prof & Service Fees-NEW			324.28							
8662	Prof & Service Fees-USE			324.28							
8663	Prof & Service Fees-PAR			324.28							
8664	Prof & Service Fees-SER			324.28							
8665	Quick Lane Prof & Servi			.00							
8666	Prof & Service Fees-BOD			324.28							
8680	Data Processing			.00							
8681	Data Processing-NEW			228.98							
8682	Data Processing-USED			228.98							

4. Use the **Print** button to print the expense information as needed.
5. Click **Exit** to return to the Vehicle Sales menu.

## Expenses By Department

The **Expenses By Department** button is used to view expense detail for a specific department for a specific month.

1. Click **Expenses By Department**. The View Expenses screen opens.
2. Click the month button at the top of the screen to select the month. The button for the selected month turns red to indicate it is selected.
3. Click the button on the bottom of the screen that corresponds with the department you want to select: **New Car, Used Car, Service, Parts, Body, Admin, or Other**.
4. A list of expenses fills in on the left side of the screen. Click an expense to view its detail. The detail fills in on the right side of the screen.

View Expenses (ABC Motors)											
JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
				3600.00			500.40	.00	SERU SUPERVISOR		
7700				440.55			315.82	.00	SERU SUPERVISOR		
7705				55.00			112.85	.00	SERU SUPERVISOR		
7730				377.80			333.68	.00	SERU SUPERVISOR		
7740				851.52			284.03	.00	SERU SUPERVISOR		
7750				540.35			294.04	.00	SERU SUPERVISOR		
7770				5.65							
7771				687.11							
7780				.00							
7790				840.00							
8004				1144.00							
8024				.00							
8034				2956.13							
8044				1587.48							
8104				194.44							
8224				600.00							
8304				450.00							
8404				420.78							
8424				726.46							
8504				273.82							
8524				30.25							
8604				441.17							
8624				367.66							
8644				324.28							
8664				228.96							
8684				414.12							
8764				1298.61							
8804				30.10							
8824				800.00							
8904											

5. Use the **Print** Button to print the expense information as needed.
6. Click **Exit** to return to the Vehicle Sales menu.

## Expense Totals

The **Expense Totals** button is used to view a comparison of your expenses for this year and last year.

1. Click **Expense Totals**. The View Expenses screen opens.
2. Click the month button at the top of the screen to select the month. The button for the selected month turns red to indicate it is selected.
3. A list of expenses fills in on the left side of the screen. Click an expense to view its detail. The detail fills in on the right side of the screen.

View Expenses (ABC Motors)												
JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	
7000	Comm & Incen-Sales-New				44413.52	81117.94						
8020	Salaries - Administrativ				5720.00	11440.00						
8030	EMPLOYEE DEFERRED COMP N				.00	1205.98		JAN	15.89	.00	100%	
8040	Employee Benefits				8446.09	16732.72						
8100	Payroll Taxes				4065.82	8386.80		FEB	150.49	.00	100%	
8200	Pensions				1944.34	2819.34						
8240	Institutional Promotion				.00	.00		Year	166.38	.00	100%	
8300	Rent and Lease Expense				3000.00	3000.00						
8320	Interest - Mortgage				.00	.00		MAR	.00	.00	%	
8340	Depreciation - Bldg & In				.00	.00						
8400	Taxes - Real Estate				2250.00	4500.00		APR	.00	.00	%	
8420	Maintenance - Building				1123.89	1579.07						
8445	Q.L.Taxes Excel Inc/Real				2421.55	2421.55		MAY	.00	.00	%	
8520	Telephone				1369.11	1672.10						
8540	Taxes-Exc Real Estate &				.00	.00		JUN	.00	.00	%	
8600	Insurance - Officers' Li				121.00	446.77						
8620	Insur-Exc Building & Emp				1764.69	3255.78		JUL	.00	.00	%	
8640	Office Supplies				1838.53	3291.77						
8660	Professional & Service F				1621.40	2623.48		AUG	.00	.00	%	
8680	Data Processing				1100.34	6730.79						
8700	Bad Debts				.00	.00		SEP	.00	.00	%	
8720	Contributions				.00	.00						
8740	Interest-Exc Veh & Mortg				.00	.00		OCT	.00	.00	%	
8760	Depreciation - Equipment				1656.51	3313.02						
8780	Equip & Veh Maint-Genera				1073.36	928.66		NOV	.00	563.08	%	
8800	Travel & Entertainment				5194.53	5194.53						
8820	Miscellaneous Expense				150.49	166.38		DEC	.00	.00	%	
8900	Dealer Salary				4000.00	8000.00						
TOTAL	Total All Expenses				93275.17	168826.68						

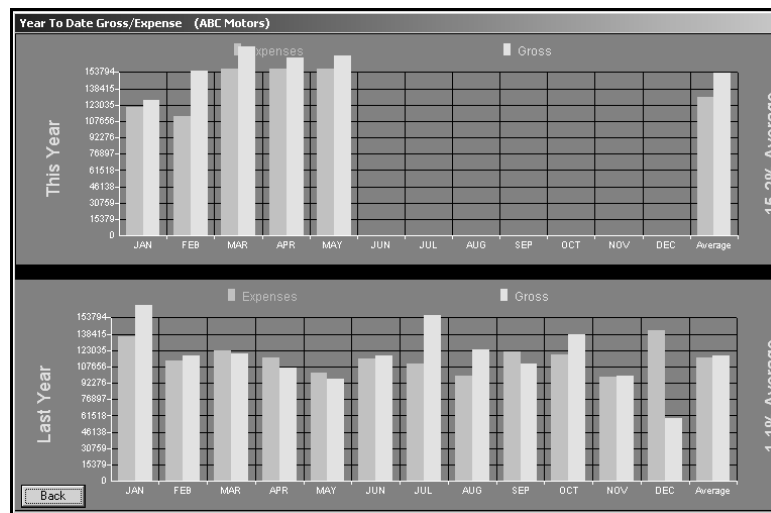
4. Click **Exit** to return to the Expenses menu.

## Print Expense Trend Analysis

Use this button to print an expense trend analysis for the past year. 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. Once you select your print type, click **Print**.

## Expense/Gross Trends

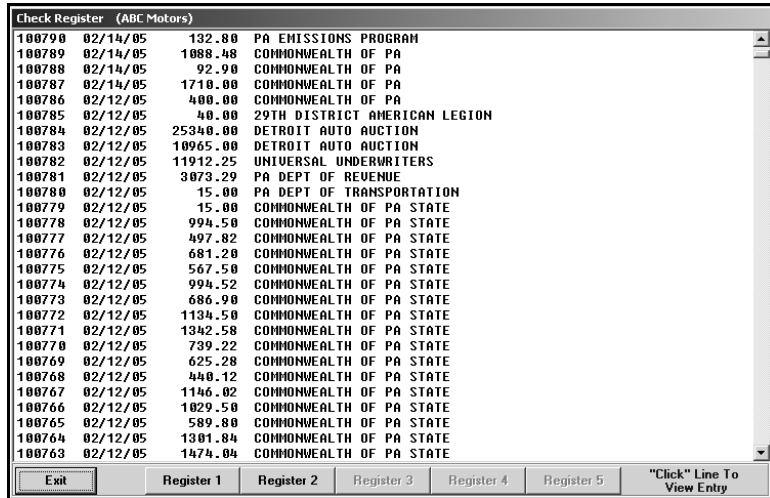
The **Expense/Gross Trends** button displays a chart that compares your gross and expenses for the current year and previous year. The top graph displays the gross and expense information for the current year, and the bottom graph displays the gross and expense information for the previous year.



## Check Register

The **Check Register** button is used to view the check register.

1. Click **Check Register**. The Check Register screen opens.
2. Click the register button at the bottom of the screen that corresponds to the check register you want to view.
3. The information fills in on the screen.



Check Number	Date	Amount	Payee
100790	02/14/05	132.80	PA EMISSIONS PROGRAM
100789	02/14/05	1088.48	COMMONWEALTH OF PA
100788	02/14/05	92.90	COMMONWEALTH OF PA
100787	02/14/05	1710.00	COMMONWEALTH OF PA
100786	02/12/05	400.00	COMMONWEALTH OF PA
100785	02/12/05	40.00	29TH DISTRICT AMERICAN LEGION
100784	02/12/05	25340.00	DETROIT AUTO AUCTION
100783	02/12/05	10965.00	DETROIT AUTO AUCTION
100782	02/12/05	11912.25	UNIVERSAL UNDERWRITERS
100781	02/12/05	3073.29	PA DEPT OF REVENUE
100780	02/12/05	15.00	PA DEPT OF TRANSPORTATION
100779	02/12/05	15.00	COMMONWEALTH OF PA STATE
100778	02/12/05	994.50	COMMONWEALTH OF PA STATE
100777	02/12/05	497.82	COMMONWEALTH OF PA STATE
100776	02/12/05	681.20	COMMONWEALTH OF PA STATE
100775	02/12/05	567.50	COMMONWEALTH OF PA STATE
100774	02/12/05	994.52	COMMONWEALTH OF PA STATE
100773	02/12/05	686.90	COMMONWEALTH OF PA STATE
100772	02/12/05	1134.50	COMMONWEALTH OF PA STATE
100771	02/12/05	1342.58	COMMONWEALTH OF PA STATE
100770	02/12/05	739.22	COMMONWEALTH OF PA STATE
100769	02/12/05	625.28	COMMONWEALTH OF PA STATE
100768	02/12/05	440.12	COMMONWEALTH OF PA STATE
100767	02/12/05	1146.02	COMMONWEALTH OF PA STATE
100766	02/12/05	1029.50	COMMONWEALTH OF PA STATE
100765	02/12/05	589.80	COMMONWEALTH OF PA STATE
100764	02/12/05	1301.84	COMMONWEALTH OF PA STATE
100763	02/12/05	1474.04	COMMONWEALTH OF PA STATE

4. Click a line to view the detail for that line.
5. Click **Exit** to close the View Journal Entry screen.
6. Click **Exit** to close the Check Register screen.

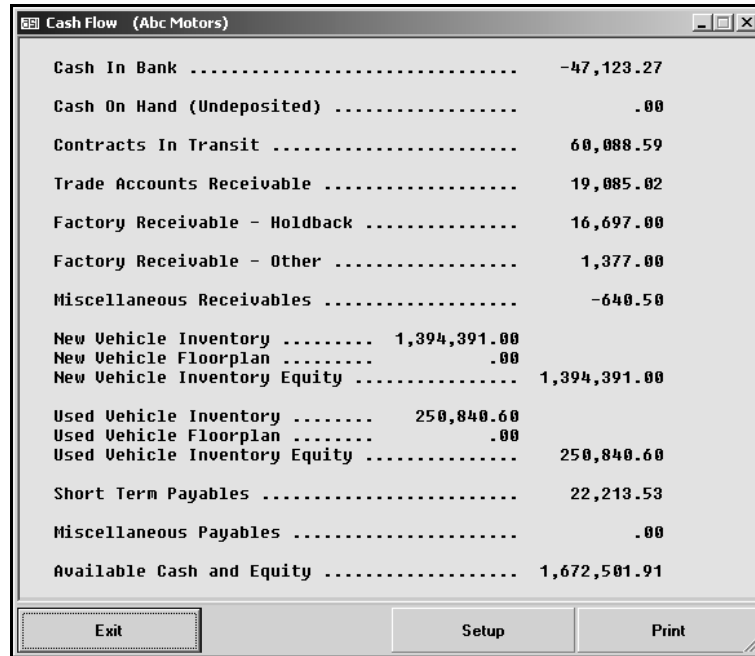


## Chapter 5 Cash Flow

The **Cash Flow** button on the Dealer Principal menu is used to view the available cash flow and equity. This information can be viewed daily so you can keep a close watch over the dealership's cash flow.

### Viewing the Cash Flow

When you click the **Cash Flow/Schedules** button, the Cash Flow screen opens and automatically displays the figures for the current month. The screen displays the cash in bank, cash on hand, outstanding bank contracts due, accounts receivables, factory receivables, equity in your new and used inventory, short-term accounts payables, and miscellaneous payables. The bottom of the screen displays the total available cash and equity.



Cash Flow (Abc Motors)	
Cash In Bank .....	-47,123.27
Cash On Hand (Undeposited) .....	.00
Contracts In Transit .....	60,088.59
Trade Accounts Receivable .....	19,085.02
Factory Receivable - Holdback .....	16,697.00
Factory Receivable - Other .....	1,377.00
Miscellaneous Receivables .....	-640.50
New Vehicle Inventory .....	1,394,391.00
New Vehicle Floorplan .....	.00
New Vehicle Inventory Equity .....	1,394,391.00
Used Vehicle Inventory .....	250,840.60
Used Vehicle Floorplan .....	.00
Used Vehicle Inventory Equity .....	250,840.60
Short Term Payables .....	22,213.53
Miscellaneous Payables .....	.00
Available Cash and Equity .....	1,672,501.91

Buttons: Exit, Setup, Print

**Tip:** Before you can use the Cash Flow feature, you must use the **Setup** button to indicate the general ledger accounts that should pull for each category. The system uses the setup to compile the information displayed on this screen. See Chapter 1 for information on setting up the Cash Flow parameters.

## Printing the Cash Flow

1. Click **Print**.
2. 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.
3. Once you select your print type, click **Print**.

## Chapter 6 Fixed Coverage

The **Fixed Coverage** button on the Dealer Principal menu is used to view the fixed coverage for the current month and last 12 months. The fixed coverage figure is the percentage of the dealership's total fixed expenses that the profit from the Service Department, Parts Department, and Body Shop covers.

When you click this button, the Fixed Coverage screen opens and automatically displays the figures for the current month and the past 12 months. The screen displays the total sales, cost, and gross for each of the three departments. The bottom of the screen displays the total department gross, total fixed overhead expenses, and the fixed coverage percentage.

	Month	YTD	March	12-Months
Service Sales .....	51,835.42	180,026.52		
Less Cost .....	18,723.25	73,767.69		
Service Gross .....			32,312.17	106,258.83
Parts Sales .....	66,273.68	295,292.91		
Less Cost .....	47,656.03	211,603.84		
Parts Gross .....			18,617.65	83,689.07
Body Shop Sales ...	.00	.00		
Less Cost .....	.00	.00		
Body Shop Gross .....			.00	.00
Total Department Gross .....			50,929.82	189,947.90
Total Fixed Overhead Expense .....			.00	.00
Fixed Coverage .....			.00%	.00%

Exit      Setup      Print

**Tip:** Before you can use the Fixed Coverage feature, you must use the **Setup** button to indicate the general ledger accounts that should pull for each category. The system uses the setup to compile the information displayed on this screen. See Chapter 1 for information on setting up the Fixed Coverage parameters.

## Printing the Fixed Coverage Information

1. Click **Print**.
2. 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.
3. Once you select your print type, click **Print**.

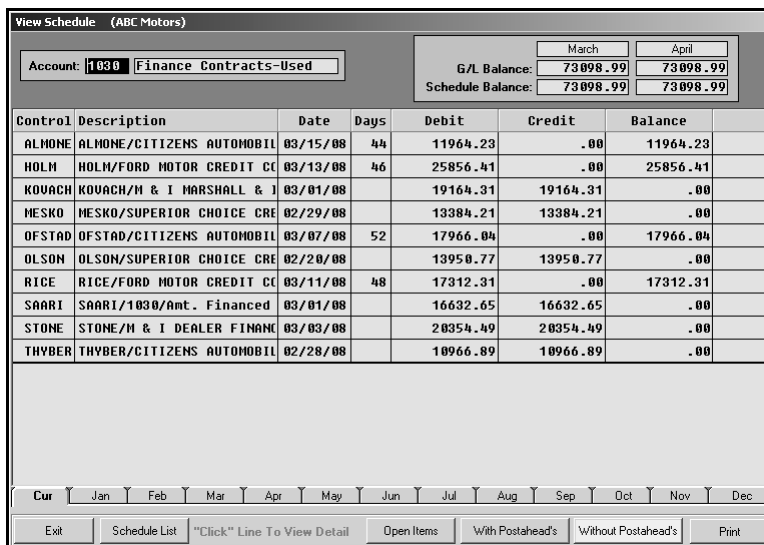
## Chapter 7 Schedules

The **Schedules** button advances you to the View Schedule menu. The options on this menu allow you to view your detail forward schedules, payable schedule, and receivable schedule. The viewing screens are identical the viewing screens in the Autosoft DMS Dealership Accounting module to ensure the same information is available in the Dealer Principal program.



1. Click the button that corresponds to the schedule you want to view.
2. For the detail forward schedule, type the account number for the schedule you want to view, or click **Schedule List** to select the account. The schedule information displays on your screen.

The accounts payable and accounts receivable schedules will automatically display when the screen opens.



Control	Description	Date	Days	Debit	Credit	Balance
ALMONE	ALMONE/CITIZENS AUTOMOBIL	03/15/08	44	11964.23	.00	11964.23
HOLM	HOLM/FORD MOTOR CREDIT CC	03/13/08	46	25856.41	.00	25856.41
KOUACH	KOUACH/H & I MARSHALL & J	03/01/08		19164.31	19164.31	.00
MESKO	MESKO/SUPERIOR CHOICE CRE	02/29/08		13384.21	13384.21	.00
OFSTAD	OFSTAD/CITIZENS AUTOMOBIL	03/07/08	52	17966.04	.00	17966.04
OLSON	OLSON/SUPERIOR CHOICE CRE	02/20/08		13950.77	13950.77	.00
RICE	RICE/FORD MOTOR CREDIT CC	03/11/08	48	17312.31	.00	17312.31
SAARI	SAARI/1030/Amt. Financed	03/01/08		16632.65	16632.65	.00
STONE	STONE/H & I DEALER FINAN	03/03/08		20354.49	20354.49	.00
THYBER	THYBER/CITIZENS AUTOMOBIL	02/28/08		10966.89	10966.89	.00

3. Use the month tabs to view the information for another month.
4. Use the buttons at the bottom of the screen to filter the information.

By default, the detail forward schedule does not include post-ahead entries, so you have the option to include them. Click **With Postaheads** to include the post-ahead entries. Click **Without Postaheads** to view only the current month's postings.

For all schedules, click **Open Items** to view just the open items. Click the button again to view all items.

5. Click **Print** or **Print This List** to print the schedule information.
6. Click a line to view the transaction details. The View Detail screen appears and displays the information. Click **Back** to close the detail screen.
7. Click **Exit** or **Back** to return to the View Schedules menu.

## Chapter 8 Daily DOC

The **Daily DOC** button on the Dealer Principal menu is used to view the information for any DOC's setup in the Accounting module of the Autosoft DMS system. You can setup nine DOC's in the Accounting module. The screen will display the information available the last time the DOC was compiled. To ensure the DOC information is up to date, the Accounting Department should compile the DOC's on a regular basis.

Daily Operating Control (ABC Motors)											
DOC 1	DOC 2	DOC 3	DOC 4	DOC 5	DOC 6	DOC 7	DOC 8	DOC 9	DOC S	DOC B	DOC P
ABC Motors			VTD			MTD					
05/31/2005 Day 30 OF 31 Days			Sales	Gross	Memo/GPUS	Sales	Gross	Memo/GPUS			
010	NEW CAR SALES	TTT	2174122	74247	95/782		-22403				
020	NEW TRUCK SALES		7573281	352687	239/1476	24205	24205	1/24205			
030	NEW WARRANTY SALES		187362	67101	202/332	1897	672	1/672			
035	TOTAL		9934765	494035	536/922	26102	2474	2/1237			
040	NEW FINANCE & INS. INCOME		131684	107844	259/416	622	622	1/622			
050	TOTAL GROSS PROFIT--NEW		10066449	601879	795/757	26724	3096	3/1032			
060	HINUS EXP.--NEW		10066449	82119	795/103	26724	3068	3/1023			
070	NET PROFIT NEW VEH. SALES		10066449	601879	795/757	26724	3096	3/1032			
080	USED CAR SALES RETAIL		2000		1/0						
090	USED TRUCKS RETAIL										
100	USED CARS WHOLESALE		479370	-33974	110/-309						
110	USED TRUCKS WHOLESALE		806162	-11945	101/-118						
120	ADJUSTMENT USED CAR INU.										
130	ADJUSTMENT USED TRUCK INU										
140	USED WARRANTY SALES		183063	51447	154/334	1897	557	1/557			
150	USED FINANCE & INS INCOME		86301	86301	161/536						
160	TOTAL GROSS PROFIT--USED		1556896	91829	527/174	1897	557	1/557			
170	HINUS EXPENSES USED VEH			-452719			-636				
180	NET PROFIT USED VEH SALES		1556896	-360890	527/-685	1897	-79	1/-79			

### Viewing a DOC

1. Click **Daily DOC**. The Daily Operating Control screen opens.
2. The buttons on the top of the screen represent the DOC's. The DOC number appears in black to indicate the DOC is available for viewing. The grayed-out buttons indicate DOC's that have not been created or that have not been compiled. Click the button that corresponds to the DOC you want to view. The button turns red to indicate it is selected.
3. The information fills in on the screen.
  - The top part of the screen identifies the compiling date and criteria.
  - The middle part of the screen displays the year-to-date, month-to-date, and daily sales and gross information for each line of the DOC.
4. Use the scroll bar on the right side of the screen to view the information that does not fit on the screen.
5. Use the **Print** button to print the information as needed.
6. Click **Exit** to return to the Dealer Principal menu.

## Viewing Additional Information

In addition to the DOC's, you can use the buttons on the bottom of the screen to view payroll information and a profit and loss summary. Click the button that corresponds to the information you want to view, and the appropriate viewing screen opens. Click **Back** on the viewing screen to return to the Daily Operation Control screen.

### DOC History

Click **DOC History** to display a list of DOC's from the last 60 days. Select the DOC from the list you want to compare to today's DOC. The screen displays the selected DOC. Click **Compare** to compare the DOC to today's DOC. The screen splits and displays today's DOC in the bottom section. Click **Exit** to return to the Daily Operating Control screen.

### Comparison DOC

Click Comparison DOC to view a comparison DOC compiled in the Accounting module. The comparison DOC serves as a yearly comparison report so you can compare how the dealership is doing this year compared to last year. A list of available comparison DOC's appears. Click to select the DOC you want to view. You can print the DOC from the viewing screen by clicking the **Print** icon on the top toolbar. Click **File** and then **Exit** to close the DOC.

### Payroll Analysis

Click **Payroll Analysis** to view a summary of the year-to-date compensation. Any employee with less than \$100 year-to-date is ignored, and any employee with the word "Owner" in the first **Position** field on the Employee Information screen appears in the list, but the average for the employee is not calculated.

The system automatically displays the Payroll Analysis. The first two columns display the employee's control number and name. The last three columns display the employee's gross plus demo, the employee's average, and the employee's demo amount (respectively). The Average Compensation YTD is the average compensation for all employees.

### Time Clock

Click **Time Clock** to view the Time Clock List. The system automatically displays all of the time clock data available since the last time the payroll was compiled. Click **Current List** to view just the time clock data for the current day. Click **Full List** to view the complete list of data again. The decimal values represent tenths of a minute.

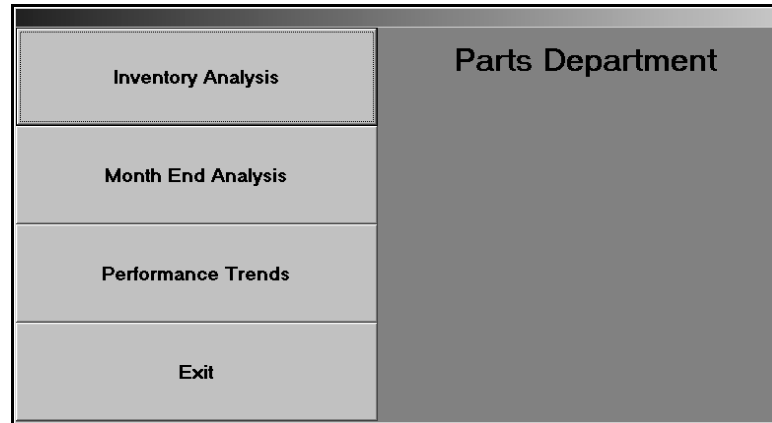
### Profit & Loss

Click **Profit & Loss** to view the profit and loss information for the current period or a selected month. The buttons on the top of the screen represent the months. Click on the button that corresponds to the month you want to view. (The **Current** button displays the profit and loss for the current month.) The button turns red to indicate it is selected. The information fills in on the screen. The top part of the screen displays the month-to-to date profit and loss, and the bottom of the screen displays the year-to-date profit and loss.



## Chapter 9 Parts

The Parts button on the Dealer Principal menu opens the Parts Department menu. This menu is used to view an aged analysis of your physical inventory. You can also use this menu to print month-end analysis and performance trend reports. All of the information available here helps you keep an eye on the Parts Department and the parts inventory.



### Inventory Analysis

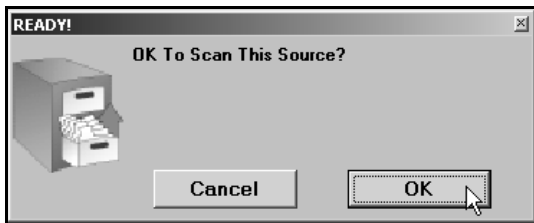
The **Inventory Analysis** button is used to view an aged inventory analysis of your physical inventory. The information is displayed in the following aging groups:

- From 0 to 3 month,
- From 4 to 6 months,
- From 7 to 9 months,
- From 10 to 12 months,
- From 13 to 18 months,
- From 19 to 24 months, and
- Greater than 24 months.

For each aging category, the analysis displays the total number of parts, the total cost of the parts, and the percentage of the total inventory the parts make up. The analysis also displays the total number of parts and accessories that are over 365 days old.

## Viewing the Analysis

1. Click Inventory Analysis.
2. The left side of the screen displays buttons for each of the nine inventory sources. Click the button that corresponds to the inventory source you want to select.
3. Click **OK** when prompted to verify you want to scan the source.



4. The system scans the parts files and displays the aged analysis. The scan may take several minutes, so do not disturb the system as it works.

Parts Analysis		Inventory Analysis		
Ford		Part No's	Total Cost	% Of Total
OEM Source 2	From 0 To 3 Months .....	0	\$ .00	.0%
OEM Source 3	From 4 To 6 Months .....	582	\$ 59,092.26	26.0%
OEM Source 4	From 7 To 9 Months .....	324	\$ 11,146.02	4.9%
OEM Source 5	From 10 To 12 Months .....	205	\$ 8,879.76	3.9%
OEM Source 6	From 13 To 18 Months .....	452	\$ 10,904.27	4.8%
OEM Source 7	From 19 To 24 Months .....	287	\$ 9,343.96	4.1%
OEM Source 8	Greater Than 24 Months .....	3576	\$ 127,748.56	56.2%
OEM Source 8	Total Of Inventory .....	5426	\$ 227,114.83	
OEM Source 9	Total Of Parts Over 365 Days .....		\$ 147,996.79	65.2%
Print	Total Of Accessories & Other Over 365 Days .....		\$ .00	.0%
Back	*Click* On A Line To View A List Of Parts In An Age Bracket			

5. Use the **Print** button to print the analysis as needed.
6. Click **Back** to return to the Parts & Service menu.

## Viewing the Parts in Each Aging Category

You can view a list of the parts in an aging category by clicking the line on the Parts Analysis screen. The aged analysis lists the part number, part name/description, stocking status, on-hand quantity, cost, extended, last sale date, number of days since the last sale, and the return code. Click **Print** to print the list. Click **Back** to return to the Parts Analysis screen.

## Month-End Analysis

The Month-end Analysis includes performance information for all inventory sources with activity for the month. The report is divided into five sections: Sales Summary, Received Stock For Month, Parts On Purchase Orders/Service R/O's, Inventory Analysis, and Turns/Fill summary.

### Sales Summary

The first section is the sales summary. For counter sales, service sales, and body shop sales, the summary lists the total pieces, sales amount, cost, gross profit, and profitability for retail, wholesale, and internal sales. The end of this section lists the total pieces, sales amount, cost, gross profit, and profitability for all sales. It also lists the total gross turn, true turn, and return on investment.

### Received Stock For Month

The second section is a summary of the received stock for the month. It identifies the total pieces and the cost of the pieces that were stocked in as regular stock, special orders, and emergency purchases. It also identifies the percentage of the overall stocked parts the parts in each category make up. This section also lists the totals for parts stocked in and sold out. The last part of this section identifies if the total cost of the received stock is a net increase or decrease.

### Parts On Purchase Orders/Service R/O's

The third section lists the parts on purchase orders and repair orders. First, this section lists the total part numbers, pieces, and cost of parts on regular stock orders, special order, and back order. Then, this section lists the total part numbers, pieces, and cost of parts that are on open service repair orders, on open body shop repair orders, and that have been removed from repair orders.

### Inventory Analysis

The fourth section is an inventory analysis. The first part of this section breaks your inventory into aging categories and lists the total part numbers, pieces, cost, and percentage of the overall inventory the parts in each aging category represent.

Next, this section lists the total part numbers, pieces, cost, and percentage for parts, accessories/other, cores, and the totals for the entire inventory. Then, it provides information on lost sales, returnable parts, parts with negative on-hand quantities, parts added with out stock, parts added with stock, deleted parts, and manually adjusted parts.

Finally, this section provides totals for normal stocking parts, special order parts, and other non-stocking parts. It lists the total number of each part in inventory, cost for the current on-hand quantity, number of pieces on hand, number of sales for the month, number of sales for the past 12 months, and the percentage of on hand to unit sales.

### Turns/Fill summary

The fifth section on the report summarizes the turns and fill ration for the month. It provides information for class A, B, C, D, and E parts. The report lists the total value of the inventory, the value of the 12-month sales, turns, total part numbers, total parts with zero on-hand quantity, and the fill ratio for the parts.

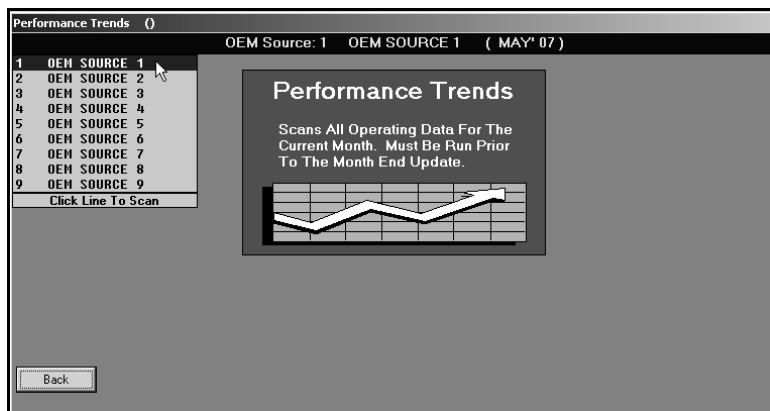
## Printing the Month-End Analysis

1. Click **Month-End Analysis**.
2. 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.
3. Once you select your print type, click **Print**.

## Performance Trends

Use this button to print a report that serves as an extension of the month-end analysis. Be sure to select the correct inventory source when generating the report. The report lists performance trends for the total inventory. To ensure that the information on the report is accurate, you must print this reports before the Parts Department runs the month-end update.

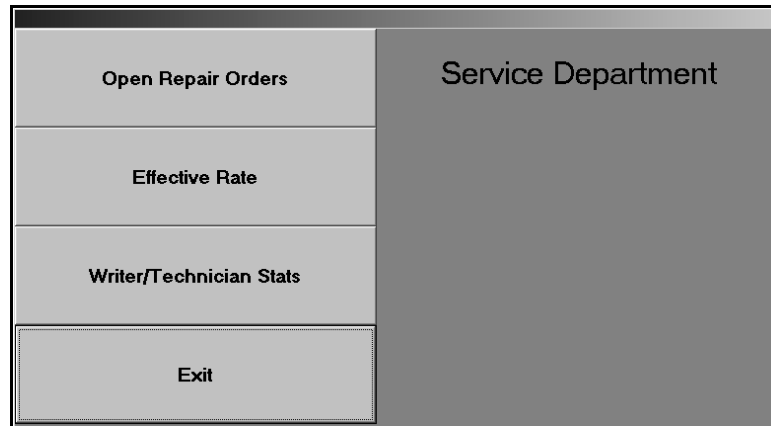
1. Click **Performance Trends**. The Performance Trends screen appears.
2. The top left corner of the screen displays a list of the inventory sources. Click the source you want to use for the report.



3. 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.
4. Once you select your print type, click **Print**.

## Chapter 10 Service

The **Service** button advances you to the Service Department menu. You use this menu to view a summary of the open repair orders. You can also print an effective rate report and statistics for the writers and technicians. This information helps you evaluate your Service Department.



### Open Repair Order

You use this button to view a summary of the open repair orders. For each open repair order, the summary lists the R/O number, service writer's ID, technician's ID, date, customer's name, vehicle's year and make, the total for labor, and the total for parts. The system also displays the total R/O count, total parts, and total labor for all of the open repair orders and the repair orders that are over five days old.

1. Click **Open Repair Orders**.
2. The system scans the Service Department files and displays a list of the open repair orders. The scan may take several minutes, so do not disturb the system as it works.

Service Repair Orders									
Open R/O's	SV	TH	Date	Customer	Year	Make	Labor	Parts	
40167	(SC)	01	06/03/05	BRIAN PARKS	2003	FORD	89.99	.00	
40168	(SI)	13	02/28/05	MICHELE KATTNER	2004	FORD	.00	7.40	
40170	(SC)	01	06/03/05	LARRY GARRISON	2003	FORD	.00	.00	
40171	(SC)	01	06/03/05	RACHEL ELLIS	2004	FORD	.00	24.86	
40178	(SC)	01	02/28/05	CHARLES WINTERS	2002	FORD	70.00	25.46	
40180	(SC)	01	03/01/05	MICHELE STEVENS	2005	FORD	.00	6.00	
40190	(QV)	11	03/03/05	TERRY THOMPSON	2004	FORD	48.13	24.00	
40195	(SC)	01	03/04/05	SANDRA GAINS	2002	FORD	35.00	15.00	
40284	(SV)	12	01/04/11/05	JOE TESTER	2004	FORD	60.25	.00	
40285	(SV)	12	01/04/11/05	STEVE SMITH	2002	FORD	120.50	149.40	
40286	(SV)	10	04/11/05	JOHN H MILLER	2003	FORD	.00	.00	
40289	(SV)	02	04/11/05	ADA RAYMAN	2005	FORD	5498.34	338.08	
Total Repair Orders .....					225				
Total Recorded Labor .....					47897.98				
Total Recorded Parts .....					23566.89				
*** Over 5 Days Old ***									
Total Repair Orders .....					221				
Total Recorded Labor .....					47807.99				
Total Recorded Parts .....					23542.03				

Buttons: Back, "Click" R/O Line To View Repair Order, Print

3. You can view a repair order by clicking on it. Once you have the repair order open in the viewing screen, you can print it by clicking the Print icon on the toolbar. Click **Back** on the View R/O screen to return to the Service Repair Orders screen.
4. Click **Print** to print the information displayed on the screen. When prompted to verify your printer is ready, select your print criteria
5. Click **Back** to return to the Service Department menu.

## Effective Rate

Use the **Effective Rate** button to print the effective rates for the Service Department. The summary includes data for the past 30 days. It includes a total analysis and a breakdown for each pay type (customer warranty, and internal). The analysis lists the daily and month-to-date total flat hours, sales amount, and effective rate.

1. Click **Effective Rate**.
2. 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.
3. Once you select your print type, click **Print**.

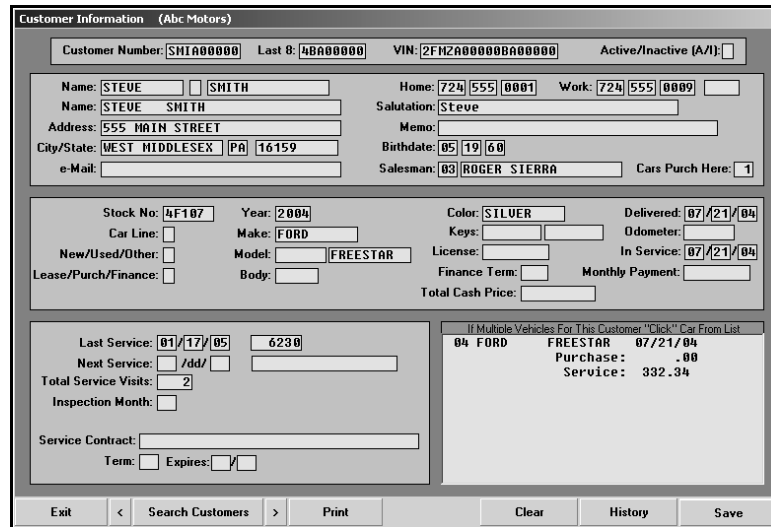
## Writer/Tech Stats

Use the **Writer/Tech Stats** button to print the technician and writer statistics. The first part of the report is the technician time report. For each technician, it lists the total customer pay, internal, and warranty units and labor sale. It also lists the total number of R/O's for the technician and the average labor sale. The second part of the report is the writer sales report. It lists all of the same information as the technician summary, but it also includes the total discounts the writer applied.

1. Click **Writer/Tech Stats**.
2. 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.
3. Once you select your print type, click **Print**.

## Chapter 11 Customer History

The last button on the Dealer Principal menu opens the Customer Information screen. You use this screen to view customers' service history. If you add information or edit information on this screen, the customer's file in the DMS system is update with the information.



**Customer Information (Abc Motors)**

Customer Number: SHIA00000 Last 8: 4BA00000 VIN: 2FHZA00000BA00000 Active/Inactive (A/I):

Name: STEVE SMITH Home: 724 555 0001 Work: 724 555 0009  
 Name: STEVE SMITH Salutation: Steve  
 Address: 555 MAIN STREET Memo:  
 City/State: WEST MIDDLESEX PA 16159 Birthdate: 05 19 60  
 e-Mail: Salesman: 03 ROGER SIERRA Cars Purch Here: 1

Stock No: 4F107 Year: 2004 Color: SILVER Delivered: 07/21/04  
 Car Line: Make: FORD Keys: Odometer:  
 New/Used/Other: Model: FREESTAR License: In Service: 07/21/04  
 Lease/Purch/Finace: Body: Finance Term: Monthly Payment:  
 Total Cash Price:

Last Service: 01/17/05 6230  
 Next Service: /dd/ Total Service Visits: 2  
 Inspection Month: Service Contract: Term: Expires: /

If Multiple Vehicles For This Customer "Click" Car From List

04	FORD	FREESTAR	07/21/04
		Purchase:	.00
		Service:	332.34

Exit < Search Customers > Print Clear History Save

## Recalling a Customer's Information

There are four ways to recall a customer's information:

- Enter the customer number in the **Customer Number** field. The customer number is the first three letters of the customer's last name and last six digits of the vehicle's VIN. The customer's information fills in on the screen.
- Enter the first three letters of the customer's last name in the **Customer Number** field, and click **Search** (or press F3). The system displays a list of customers whose last name begins with the letters. Click on the customer in the list you want to select, and the customer's information fills in on the screen.
- Enter the last eight characters of the VIN in the **Last 8** field. The system will display the record for the first customer that meets the criteria you entered. Click on the arrow keys on the side of the **Search** button to scroll through the records. The customer's information fills in on the screen. (You can also scroll by pressing F2 to view the previous record and F4 to view the next record.)
- Click **Search** (or press F3). On the Customer Search Criteria screen, enter the first three letters of the customer's last name, the last four digits of the customer's phone number, or the customer's license plate number. A list of the customers who meet the criteria you entered appears. Click on the customer you want to select. The customer's information fills in on the screen.

## Adding a New Customer

1. Enter the appropriate information in each field.
2. Press ENTER to advance to the next field. (Press F1 to view the help page to read detailed descriptions of the information required in each field.)
3. Click **Save** to save the information entered.
4. Click **Exit** to return to the Dealer Principal menu.

## Editing a Customer's Information

1. Select the customer.
2. Click in a field, and edit the information as needed.
3. Click **Save** to save the changes.

## Printing a Customer's Information

1. Select the customer.
2. Click **Print**.
3. When prompted to verify your printer is ready, select your print criteria.

## Viewing a Customer's Service History

1. Select the customer.
2. Click **History**.
3. A list of repair orders for the customer is displayed.
4. Click a repair order to view the finished R/O. A summary of the repair order opens on your screen.
5. Click **Back** to close the customer's history.

**Tip:** If you select to view a repair order in the list that is too old, you will receive a message indicating that there is no data available for the selected R/O. Click **OK** to acknowledge the message.



## **Conclusion**

This concludes how to use the Dealer Principal. You should reference the manual as you work until you are comfortable with the procedures. When you do have questions, press F1 to display the help page so you can read detailed information about each screen. If you cannot find the information you are looking for, call the Autosoft International Support Desk at (800) 473-4630 for assistance.

