

Use these instructions to create the ADMI Team Parts Plus report. You will create the report using the Autosoft Report Generator. If you have any questions about this report, please call Autosoft 800.473.4630.

## Creating the Report

1. Click **Reports** on the Parts Inventory main menu.
2. Click **Report Generator** on the Inventory Reports menu. The Report Generator opens.
3. Click to select the inventory source you want to use for the report, and click **Next**.
4. A list of available fields for the selected report is displayed in the middle of the screen. First, you will need to create three new fields to add to this report.
5. The first new field will be ELV. Click **Create Field**, and enter the following information on the Create/Edit Field screen.
  - In the **Name**, type **Extended Value**.
  - In **Header**, type **ELV**.
  - In **Field Width**, type **12**.
  - In **Alignment**, select **Right**.
  - In **Format**, type **#,##0.00**.
  - In the list of entries below the **Formula** box, click **Dealer Cost**, and then click the \* button on right. Next, click **Current In Stock**. The entry in the Formula box should look like this:  
**Dealer Cost \* Current In Stock**.
6. Click **Save** to save the field you just created.
7. The second new field will be 12MS. Click **Create Field** again, and enter the following information on the Create/Edit Field screen.
  - In the **Name**, type **12 Months Sales**.
  - In **Header**, type **12MS**.
  - In **Field Width**, type **12**.
  - In **Alignment**, select **Right**.
  - Leave the **Format** field blank.
  - In the list of entries below the **Formula** box, click **January Sales**, and then click the + button on right. Next, click **February Sales**, and then click the + button on right. Continue until you have all of the months through December. The entry in the Formula box should look like this:  
**January Sales + February Sales + March Sales + April Sales + May Sales + June Sales + July Sales + August Sales + September Sales + October Sales + November Sales + December Sales**.
8. Click **Save** to save the field you just created.

9. The third new field will be 6MS. Click **Create Field** again, and enter the following information on the Create/Edit Field screen.
  - In the **Name**, type **6 Months Sales**.
  - In **Header**, type **6MS**.
  - In **Field Width**, type **12**.
  - In **Alignment**, select **Right**.
  - Leave the **Format** field blank.
  - In the list of entries below the **Formula** box, create an entry similar to the one used for the 12MS field, but only select the previous six months.
10. Click **Save** to save the field you just created.

**Important:** This field will require editing each month to reflect the past six months sales. Once you create the field, you will see an **Edit Field** button. You will use this button to edit the field each month.

11. The three fields you created will now appear in the field list in the Report Generator. In this list of fields, select the following fields. A check mark will appear in the box next to the field to indicate you selected it.
  - Part Number
  - Group
  - Stock Status
  - Subsource
  - Dealer Cost
  - Current In Stock
  - Reorder Level
  - Stock To Level
  - Last Sale Date
  - Last Resupply Date
  - Extended Value
  - 12 Months Sales
  - 6 Months sales
12. Click **Next** to continue.
13. On the first filter line,
  - Select **Part Number** from the list for the first box.
  - Select **> =** from the list for the second box.
  - Type **0** in the last box in this row.
  - Type **99999999999999** in the **and less than** box that appears.

14. On the second filter line,
  - Select **Group** from the list for the first box. This will filter non-Ford parts since they should not have group numbers.
  - Select **> =** from the list for the second box.
  - Type **0** in the last box in this row.
  - Type **9999999999999999** in the **and less than** box that appears.
15. Click **Build Report**.
16. Click to select **View on Screen**, and click **OK**.
17. Verify the information on the report looks correct. If the report is correct, close the report-viewing screen.
18. Click **Save**.
19. In **Report Name**, type **ADMI Team Parts Plus**, and click **Save**.
20. Click **OK** when prompted the report has been saved.
21. Click **Build Report** again, and this time, click to select **Save as CSV**. This will save the report as Report CSV in the C:\ASIP folder. From there, you can extract it, attach it to an e-mail message, etc.

## Loading the Saved Report

Once you have saved the report, you can open it again in the Report Generator and use it to build another report.

1. On the first screen where you selected the inventory source, click **Load Report**.
2. Click the report in the report list, and click **Select**.
3. Click **Back** to return to the field screen.
4. Click the **6 Month Sales** field in the list, and click **Edit Field**.
5. Edit the **Formula** box to reflect the last six months.
6. Click **Save**.
7. Click **Next**.
8. Click **Build Report**.