Autosoft ►FLEX™
DMS
GM Parts Workbench

Autosoft
Dealer Management System™

Trademarks

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Introduction

Welcome to the Autosoft GM Parts Workbench program. Through the Autosoft GM Parts Workbench, your Parts Department has a direct connection to General Motors so it can effectively manage its parts inventory. A direct connection to GM means your orders are sent and the information is retrieved from GM in real time.

The Autosoft GM Parts Workbench even automatically retrieves order inquiries, electronic packing slips, and invoices every night for you so you have the information readily available each morning. You can also connect to GM at any time and pull new order inquiries, electronic packing slips, and invoices to ensure you have the most current information to keep your Parts Department running smoothly. The program also offers direct access to part information from GM that can be updated to your GM parts tape at any time and allows you to locate parts you need at manufacturer warehouses so you can get the parts you need fast.

Since the Autosoft GM Parts Workbench program integrates with your Autosoft DMS system, you pull part orders generated in Autosoft DMS directly to Autosoft GM Parts Workbench, and changes you make to your orders in the Autosoft GM Parts Workbench are automatically updated to your Autosoft DMS system. You will also have access to your on-hand quantities when working in the Autosoft Parts Workbench, eliminating the need to switch between the two programs.

This Introduction provides information about basic process of the Autosoft GM Workbench program. It covers how to open and close the program as well as how to use the Help feature. Please review the information to ensure you are familiar with these basic activities.
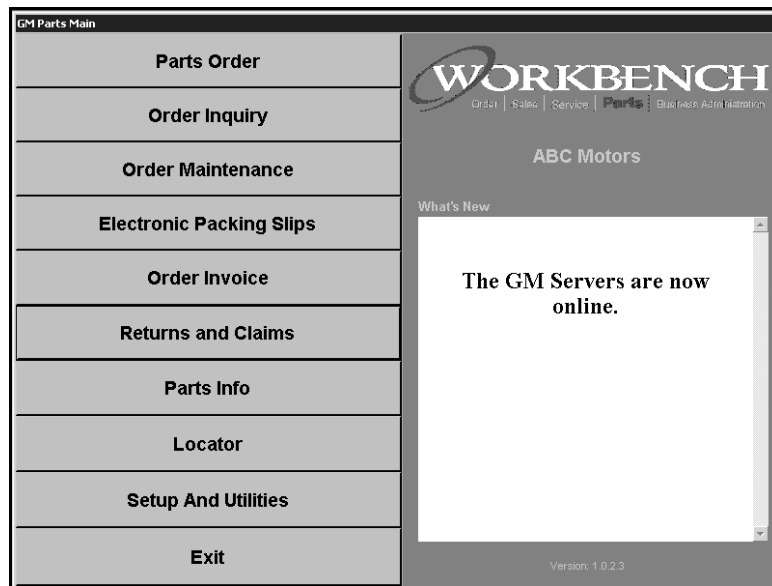
Opening the Program

1. Double-click the **GM Parts Workbench** icon on your desktop.

2. The Autosoft GM Parts Workbench program opens. You will be at the main menu.

Important: If you are prompted to specify your dealership's name and your SQL server, call Autosoft International at (800) 473-4630 for assistance. This is important setup information that must be entered correctly. Do not continue without calling Autosoft International.

Using Help Pages

Each screen has its own help page to assist you as you work. 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, and

- A list of the buttons on the screen and instructions for using each button.

Closing the Program

1. Return to the main menu.

2. Click **Exit**.

Getting Ready

The rest of this document provides instructions for setting up and using your Autosoft GM Parts Workbench program. You will first learn how to enter setup information for the system. The remaining information will walk you through processing and managing your part orders. If at any time you have questions about the Autosoft GM Parts Workbench program, call Autosoft International at (800) 473-4630, and an Autosoft Support Desk Representative will assist you.

Chapter 1 System Setup

The first thing you must do is complete the Autosoft GM Parts Workbench setup. You will set global parameters that affect the entire system and local parameters that affect only the current workstation.

Setting Global Parameters

The global parameters apply to the entire Autosoft GM Parts Workbench application. These settings apply to all users. You use this screen to create dealerships. If you have multiple dealerships with multiple parts departments, this allows you to create dealerships for each department that needs to order part using a different dealer code.

You will identify each dealership you create as the primary or a secondary dealership. You can only have one primary dealership, and you must assign it your primary dealer code. You can have multiple secondary dealerships based on the needs of your dealership for ordering purposes.

Once you create dealerships here, use the GM Secondary Parameters to select the default dealerships for each workstation. The GM Secondary Parameters are local setting; they apply only to the current workstation. Each workstation will need to set the GM Secondary Parameters individually.

Adding a Dealership

1. Click **Setup and Utilities**. The GM Setup Parameters menu appears.
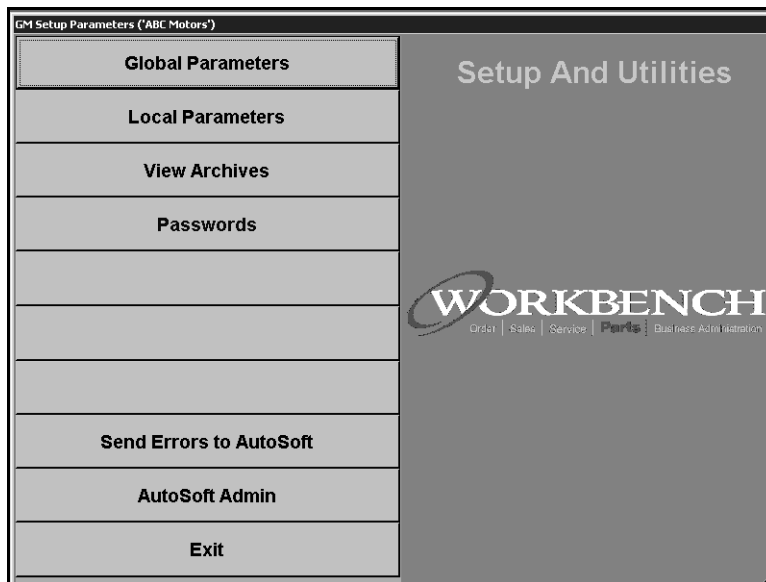
2. Click **Primary Dealer Parameters**. The GM Global Parameter screen appears.

3. Type the dealership's dealer code, name, and address in the fields provided.

4. Select the parts source for the dealership from the **Parts Source** list.

5. Use the **Status** list to identify if this is an active or inactive dealership. Only active dealerships will be available in the GM Secondary Parameters.

6. Use the **Dealer Type** list to select if this is the primary or a secondary dealership. Remember, you can only have one primary dealership. The primary dealership will be identified by ***** in the dealership list.

7. Use the **Primary Dealer Info** section to select the primary dealer. This allows you to have multiple primary dealers in the system. You must assign a primary dealer to a secondary dealer.

8. The **SQL Server Info** section should already contain the SQL server information. If this information is missing, call Autosoft International at 1-800-473-4630 for assistance.

9. Click **Save**. The system will display a message indicating the dealer information was successfully updated. Click **OK** to acknowledge the message.

10. The dealership you created is added to a list at the top of the screen.

11. Continue to add dealerships as needed.

12. Click **Exit** to close the screen when you are finished.

Editing a Dealership

1. Click the dealership in the list at the top of the screen. The dealership's information fills in the fields on the bottom of the screen.

2. Click in a field, and edit the information as needed. You can only edit the fields under **Primary Dealer Info** when viewing the primary dealership's information.

3. Click **Save** to save the changes.

4. The system will display a message indicating the dealer information was successfully updated. Click **OK** to acknowledge the message.

5. Click Exit to close the screen when you are finished.

Setting Local Parameters

The local parameters apply only to the workstation on which the parameters are entered. The setup will need to be completed on all workstations running the Autosoft GM Parts Workbench program. You will select the dealership you want to set for the workstation and enter contact information for the dealership. In addition, you will enter the user name and password required for you to log on to the GM Parts Workbench User Interface on DealerWorld.

Entering Local Parameters

1. Click **Secondary Dealer Parameters** on the GM Setup Parameters menu. The GM Local Parameter screen appears.

2. The right side of the screen lists all the active dealerships entered in the GM Primary/Global Parameters.

3. Click the box in front of a dealership to select the dealership as the default for this workstation. Only one dealership can be set as the default. A check mark appears in the box for the selected dealership. The dealership's information fills in the **Local Secondary Dealer Info** section on the screen.

4. Under **Default Contact Info**, type the contact's name and phone number. This information will be sent to GM whenever contact information is required.

5. Under User Info, type your user name and password for the GM Parts Workbench User Interface on DealerWorld.

6. Click **Save**.

7. The system will display a message indicating the local settings were successfully updated. Click **OK** to acknowledge the message.

8. Click **Exit** to close the screen.

Editing Parameters

1. The default information automatically displays when you open the screen.

2. To select a different default dealership, click to select the box in front of the dealership's name/dealer code. A check mark appears in the box for the selected dealership.

3. If you need to edit the **Default Contact Info** or **User Info**, click in a field, and edit the information as needed.

4. Click **Save**.

5. The system will display a message indicating the local settings were successfully updated. Click **OK** to acknowledge the message.

6. Click **Exit** to close the screen.

Passwords

The Passwords option allows the Parts Manager to set passwords for the Parts Workbench program. The master password is required to access this feature. The initial master password is preset by Autosoft. Your Parts Manager received this password during installation. If you forget the master password, you will need to call Autosoft at (800) 473-4630 for assistance or to have the password reset.

Tip: The **Send Errors to Autosoft** and **Autosoft Admin** buttons on this menu are for troubleshooting by Autosoft International. Do not attempt to access these areas unless you are instructed to do so by an Autosoft Support Representative.
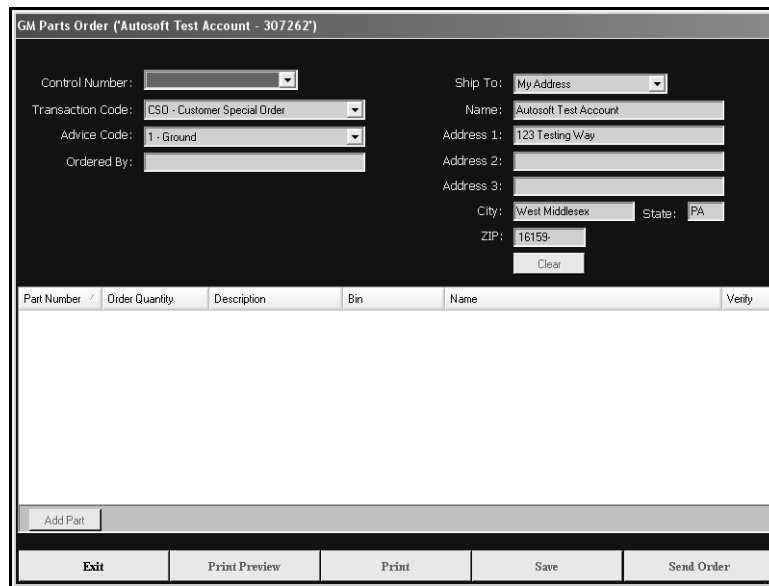
Getting Ready

Once you have entered the setup parameters, you are ready to begin using the Autosoft GM Workbench program. The rest of this manual covers each option available in the program. Please make sure you read the corresponding information before using the program.

Chapter 2 Parts Orders

You use the GM Parts Orders screen to process parts orders. Since Autosoft GM RIM automatically transfers your daily stock order every night, you will use this screen primarily to submit customer special orders (CSO) and qualified promotional orders (QPO). Because Autosoft GM Workbench integrates with Autosoft DMS, you will create parts orders in Autosoft DMS Parts Inventory module as you normally do and pull the orders to this screen for processing. Once you finish reviewing and editing the order, you transmit it directly to General Motors from this screen.

When working on this screen, you can sort the list by clicking on the column header. You can only edit the order quantity, bin, or name. Any changes you make here will be saved back to the purchase order in your Autosoft DMS system. You can also view an inquiry immediately after you submit the order to verify the status of the order.

Tip: Orders are closed once all lines on the order have been filled and invoiced. All closed orders are archived. You can view archived orders using the **Archive** option on the GM Setup Parameters menu. See Chapter 9 "Archives" for information about viewing archived files.

Submitting an Order

1. Click **Parts Order**. The GM Parts Order screen appears.

2. Use the **Control Number** list to select the purchase order you want to process. Purchase orders must be four alphanumeric characters. If a purchase order does not appear in the list, return to the Autosoft DMS Parts Inventory module and verify the purchase order number follows the correct format.

3. The information automatically fills in on the screen.

4. Use the **Transaction Code** list to select the type of order: customer special customer special order (CSO), daily replenishment order (DRO), or qualified promotional order (QPO). CSO is the default code.

5. Select the shipping method from the **Advice Code** list: ground, next day, next day Saturday, or auto upgrade.

6. Use the **Ordered By** field to identify the individual who is placing the parts order.

7. The "Ship To" information automatically defaults to the dealership information selected in the GM Local Parameters for this workstation.

    If you need to ship the order to a different address for a CSO, select **Other** from the **Ship To** list. The remaining shipping fields clear. Type the customer's name, address, city, state, and ZIP Code in the corresponding fields. You can also click **Clear** to clear the address fields to edit them as needed.

8. The bottom of the screen displays the list of parts on the order.

9. You can edit part information or add parts to the order as needed. (Please see Editing Parts Information on page 9 or Adding Parts to the Order on page 9 for instructions.) If you edit part information or add parts to the order, you must click **Save** to save the changes.

10. Click **Send Order**. The program connects to GM and sends the order.

11. When the order has been sent, you will see a messages indicating the order has been successfully sent. The message will indicate the number of lines that were accepted and rejected. You will need to research any failed lines to identify the problem.

12. At this point, you have two options. Click **OK** to close the message, or click **View Inquiry** to view information from the current order. (See Chapter 3 "Parts Order Inquiry" for instructions on how to work on the GM Parts Inquiry screen.)

13. Click **Exit** on the GM Parts Order screen to return to the GM Parts Workbench main menu.

Editing Part Information

1. Select the purchase order.

2. The bottom of the screen displays the list of parts on the order.

3. Click in a field to edit the order quantity, bin, or name. These are the only fields that can be edited on this screen.

4. Click **Save** to save the changes. This ensures the changes you make are saved in case you need to exit this screen and send the order later.

Adding Parts to an Order

1. Select the purchase order.

2. Click **Add Part**. The Add Part screen appears.

3. Type the part number. The Part description will pull from the GM price tape, and the bin and on-hand quantity will pull from your inventory records if the part is currently in your inventory.

4. Type the order quantity.

5. Click **OK**. The part is added to the current order.

6. Click **Save** to save the changes.

7. Send the order.

Removing Parts from the Order

1. Select the purchase order.

2. Change the **Order Quantity** field to **0** (zero).

3. Click **Save** to save the changes.

4. Send the order.

5. Parts with a zero order quantity will not be sent.

Previewing the Order

1. Click **Print Preview**.

2. A summary of the order displays on screen.
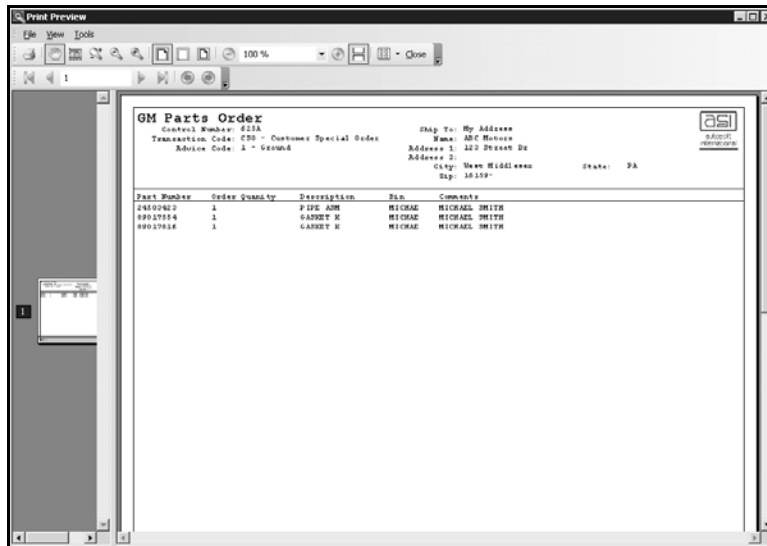
3. The top part of the order summary displays the control number, transaction code, advice code, and ship to information.

4. Next, the summary lists the parts for the order. It includes the part number, order quantity, description, bin, and comments/customer's name.

5. To print the order, click the **Print** icon on the toolbar, or click **File** and select **Print**.

6. To close the preview screen, click the **X** in the top right corner, or click **File** and select **Exit**.

Printing the Order

1. Make sure the correct order is displayed on the GM Parts Order screen.

2. Click **Print**.

3. In the Print dialog, select the printer, and click **Print**.

Chapter 3 Parts Order Inquiry
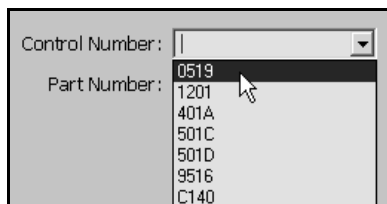
The Autosoft GM Parts Workbench application retrieves order inquires when you successfully submit your part orders and performs an inquiry on your open orders each night. You can view this information at any time. You can also run a new inquiry that will connect to GM and pull current information about your open orders. You will also see the inquiry screen if you select to view the inquiry after submitting an order.

Viewing an Inquiry

1. Click **Order Inquiry**. The GM Parts Inquiry screen appears.

2. Select the purchase order number from the **Control Number** list. The list will only include control numbers for the last two weeks. For orders older than two weeks but less than 365 days old, you can type the control number in this field to view an inquiry for the order. You will have to use the archives to view inquiries for orders older then 365 days.

3. If you want to inquire on a specific part for the order, select the part from the **Part Number** list. Otherwise, leave this field blank to inquire on the complete order.

4. Click **Open** to view the current inquiry on the system for the order.

Tip: The date and time that appear in the **Last Updated** column (the last column on the page) identify when the inquiry was retrieved. Use this date to verify the information is current. See F1 help for complete details about the information displayed in the remaining columns.

Pulling a New Inquiry

1. Select the purchase order number from the **Control Number** list.

2. If you want to inquire on a specific part for the order, select the part from the **Part Number** list. Otherwise, leave this field blank to inquire on the complete order.

3. Click **Open** to view the current inquiry on the system.

4. Click **Update** on the bottom of the displayed inquiry to pull a new inquiry from GM.

5. The system connects to GM, retrieves a new inquiry for the selected order, and displays it on the screen.
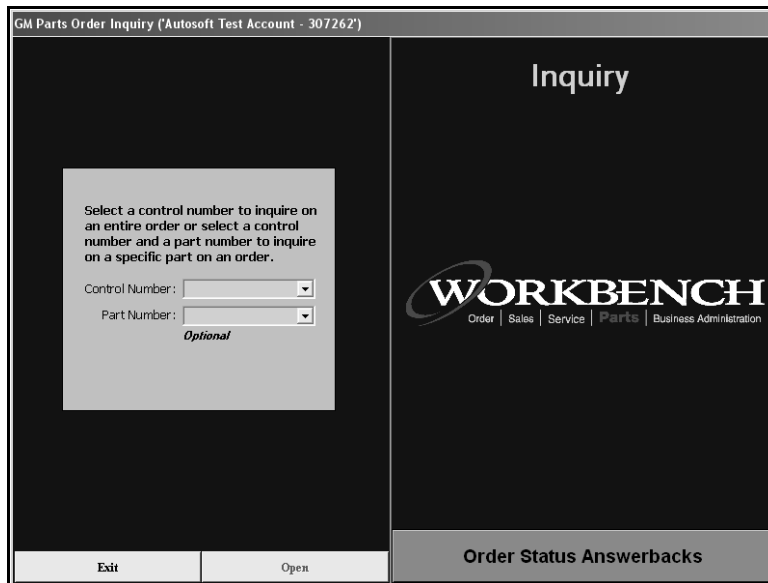
Printing the Inquiry

1. Make sure the correct order is displayed on the GM Part Inquiry screen.

2. Click **Print**.

3. In the Print dialog, select the printer, and click **Print**.

Tip: Previewing the inquiry using the **Print Preview** button displays the same information on the viewing screen. To print the order from the Print Preview screen, click the **Print** icon on the toolbar, or click **File** and select **Print**. To close the Print Preview screen, click the **X** in the top right corner, or click **File** and select **Exit**.

Viewing the Order Status Answerbacks

The **Order Status Answerbacks** button on the bottom of the GM Parts Inquiry screen allows you to pull and view the order status answerbacks from General Motors. You can select the date range for the answerbacks you want to retrieve, so you can retrieve old answerbacks or new answerbacks.

Reviewing Old Answerbacks

You can search the answerback in history to review a previously pulled answerback. You will specify the information relevant to the answerback (date, control number, etc.) for the answerback you want to view. You cannot edit answerbacks. All you can do is review and print the information.

1. Click **Order Status Answerbacks** on the bottom of the GM Parts Inquiry screen. The GM Parts Order Status Inquiry Answerbacks screen appears.

2. Use the fields at the top of the screen to specify the information for the answerback you want to review, and click **Search**.

3. The window on the bottom of the screen will display the answerbacks in history that meet the criteria you specified.

4. At this point, you can also click **Print All Answerbacks** to print all the answerbacks that appear in the search list.

5. To view an answerback, click the answerback in the list window, and click **Open** to view it.

6. Click **Print** to print the answerback from the viewing screen as needed.

Pulling an Order Status Answerbacks from GM

You can pull two order status transactions per day from GM. This allows you to pull new answerbacks (answerbacks not previously pulled within the last seven days) or old answerbacks.

1. Click **Get Answerbacks** on the bottom of the GM Parts Order Status Inquiry Answerbacks screen.

2. Use the **Pending Answerbacks** drop-down list to specify if you want to pull new answerbacks or old answerbacks. Select **Y** to pull new answerbacks or **N** to pull old answerbacks.

3. If you select **N** to pull old answerbacks, specify the date for the answerback. Use the drop-down calendar to select the date.

4. Click **Select** to retrieve the answerback.

5. The system connects to GM, retrieves the answerback, and displays it on the screen.

Chapter 4 Order Maintenance

The Order Maintenance feature provides options that help you manage your parts orders. You can cancel a specific backorder, cancel all backorders, create SPAC cases, or upgrade an order to a CSO. You can only cancel orders that were processed through your Autosoft DMS system.
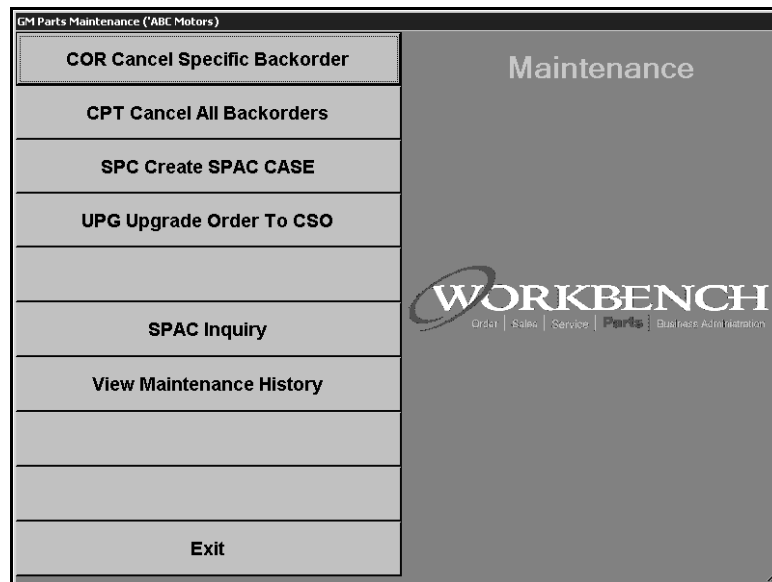
Viewing an Inquiry

Before you make cancel or upgrade any order, you can view the current inquiry on the system for the order or pull a new inquiry to check the order's status. This allows you to verify the order information before submitting the new request.
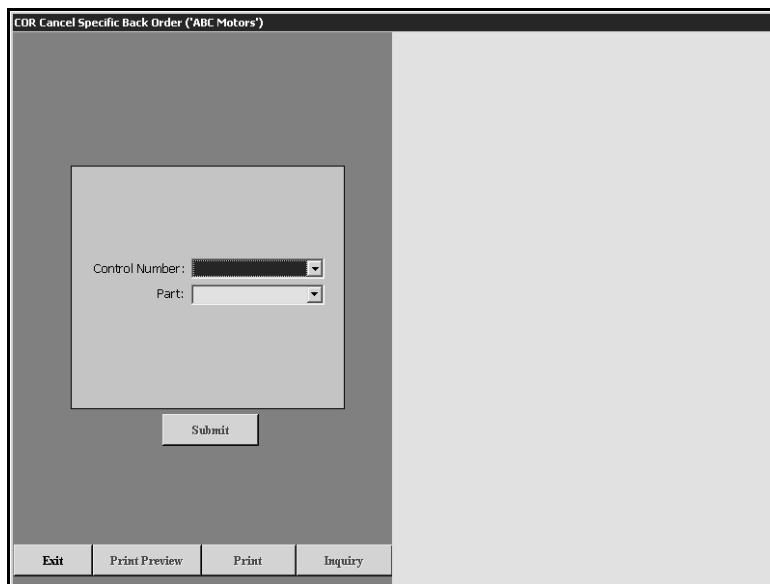
1. Click **Order Maintenance**. The GM Parts Maintenance menu appears.

2. Click the button that corresponds to the backorder cancellation or order upgrade you want to make. The appropriate screen appears.

3. Select the purchase order number from the **Control Number** list.

4. If you want to inquire on a specific part for the order, select the part from the **Part Number** list. Otherwise, leave this field blank to inquire on the complete purchase order. When canceling all backorders for a specific part, you can only select a part number and, therefore, only perform an inquiry based on the part number.

5. Click **Inquiry** to view the current inquiry on the system.

6. The inquiry displays. (Please see Chapter 3 "Parts Order Inquiry" for details about the information displayed on the GM Parts Inquiry screen.)

7. If you want to pull a new inquiry, click **Update** on the bottom of the displayed inquiry to pull a new inquiry from GM.

8. The system connects to GM, retrieves a new inquiry for the selected order, and displays it on the screen.

9. Click **Exit** to close the GM Parts Inquiry screen.

Canceling Specific Backorders

Use the **COR Cancel Specific Backorder** option to cancel a backorder for a part on a purchase order. The system checks to verify the part is on back order. If it is not on back order, the request is canceled.

1. Click **COR Cancel Specific Backorder**. The COR Cancel Specific Backorder screen appears.

2. Select the purchase order from the **Control Number** list.

3. Use the **Part** list to select the part. It will list all parts on the selected purchase order.

4. Click **Submit**. The system connects to GM and sends the request.

5. Once the request has been submitted, the window on the right side of the screen will display the information for the cancellation. It will identify the effective date (date the request was sent), purchase order number, part number (if selected), and status (whether the request was issued or canceled).

Canceling All Backorders

The **CPT Cancel All Backorders** option allows you to cancel all backorders for a specific part. This will affect all purchase orders on which the part has been placed on backorder. The system checks to verify the part is on back order. If it is not on back order, the request is canceled.

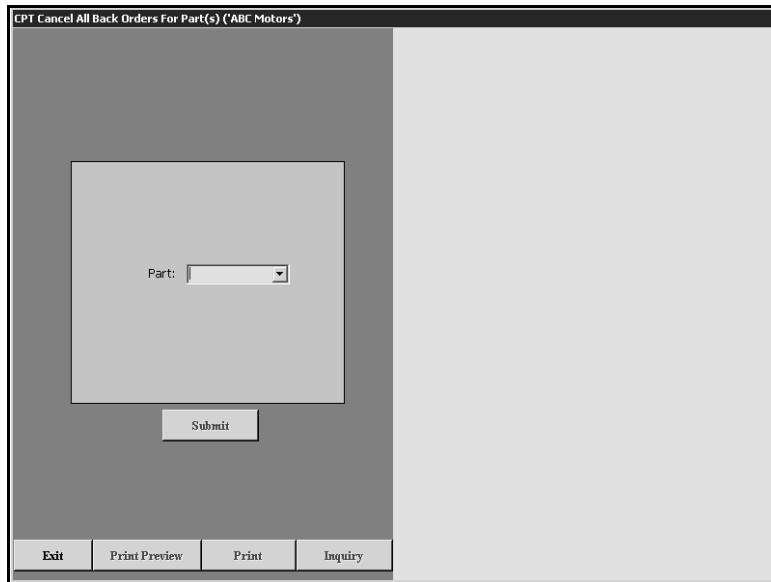1. Click **CPT Cancel All Backorders**. The CPT Cancel All Backorders screen appears.

2. Use the **Part** list to select the part. It will list all parts on backorder.

3. Click **Submit**. The system connects to GM and sends the request.

4. Once the request has been submitted, the window on the right side of the screen will display the information for the cancellation. It will identify the effective date (date the request was sent), part number, status (whether the request was issued or canceled), and the purchase orders affected by the cancellation.

Creating SPAC Case

Use the **SPC Create SPAC Case** option to create a special emergency order (SPAC). You can only upgrade a customer special order (CSO) to a SPAC. You must enter the VIN for the vehicle that requires the part. The part number for the order must be applicable to the VIN entered in order to create a SPAC.

1. Click **SPC Create SPAC Case**. The SPC Create SPAC Case screen appears.

2. Select the purchase order from the **Control Number** list.

3. Use the **Part** list to select the part. It will list all parts on the selected purchase order.

4. The **Contact Person** and **Contact Phone** pull the contact information entered on the GM Local Parameters screen. You can edit these fields as needed.

5. Type the VIN for the vehicle that requires the part. The part number must be applicable to the VIN for the vehicle associated with the order.

6. Click **Submit**. The system connects to GM and sends the request.

7. Once the request has been submitted, the window on the right side of the screen will display the information for the SPAC. It displays the effective date, order number, part number, contact information, VIN, status (if the upgrade was successful or not), case number, and the host message code.

Upgrading an Order to a CSO

Use the **UPG Upgrade Order To CSO** option to upgrade a daily replenishment order (DRO) to a customer special order (CSO).

1. Click **UPG Upgrade Order To CSO**. The UPG Upgrade Order To CSO screen appears.
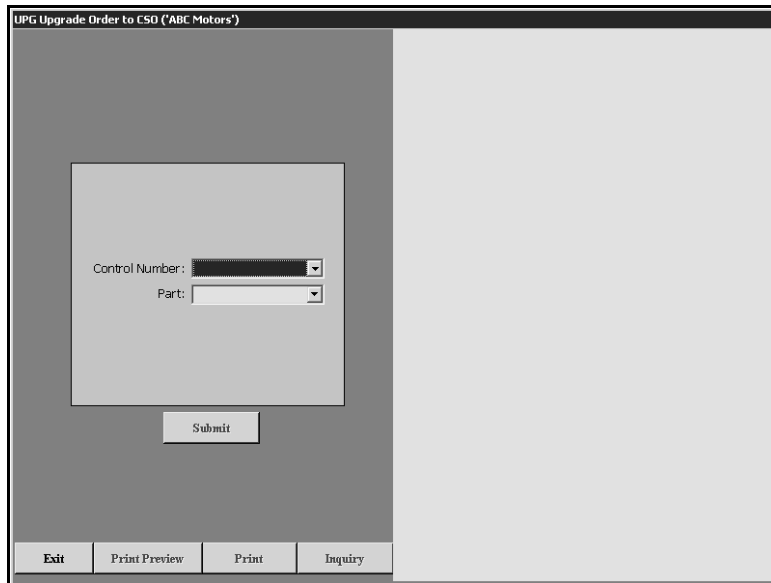

2. Select the purchase order from the **Control Number** list.

3. Use the **Part** list to select the part. It will list all parts on the selected purchase order.

4. Click **Submit**. The system connects to GM and sends the request.

5. Once the request has been submitted, the window on the right side of the screen will display the information for the CSO.

Previewing the Information

Once you submit the cancellation or upgrade and the system displays the response from GM, you can preview the information. You can also print the information from the preview screen as needed.

1. When the information displays on the right side of the screen, click **Print Preview**.

2. A viewing screen appears and displays the information for the cancellation. This is the same information displayed on the right side of the screen after the cancellation or upgrade request has been sent.

3. To print the order, click the Print icon on the toolbar, or click **File** and select **Print**.

4. To close the preview screen, click the **X** in the top right corner, or click **File** and select **Exit**.

Printing the Information

Once you submit the cancellation or upgrade and the system displays the response from GM, you can print the information right from the screen as needed.

1. When the information displays on the right side of the screen, click **Print**.

2. In the Print dialog, select the printer, and click **Print**.

Performing a SPAC Inquiry

The SPAC Inquiry option allows you to retrieve information about a SPAC order. This information comes from GM.

1. Click **SPAC Inquiry**.

2. Type the case number for the inquiry.

3. Click **Update**. The system connects to GM and retrieves the information.

4. Click **Exit** to close the screen.

Previewing the Order

1. Make sure the correct order is displayed on the SPAC Inquiry screen.

2. Click **Print Preview**.

3. A summary of the order displays on screen.

4. To print the order, click the **Print** icon on the toolbar, or click **File** and select **Print**.

5. To close the preview screen, click the **X** in the top right corner, or click **File** and select **Exit**.

Printing the Inquiry

1. Make sure the correct order is displayed on the SPAC Inquiry screen.

2. Click **Print**.

3. In the Print dialog, select the printer, and click **Print**.

View Maintenance History

The **View Maintenance History** option allows you to search the history of your maintenance requests.

1. Click **View Maintenance History**.

2. Click to select the maintenance type you want to search for, or leave **All** selected to search all requests.

3. Type the control number you want to find. If you want to search strictly based on a date, leave this field blank.

4. If you want to search for a specific part number, type the part number. If you want to search strictly based on a date, leave this field blank.

5. If you want to search for a specific date, click to select the box in front of the date field. Use the drop-down calendar to select the date.

6. Click **Search**. The results will display in the window on the bottom of the screen.

7. Click the document you want to view, and click **Open**. The document information displays in the window on the right side of the screen.

8. Click **Print** or **Print Preview** to print the information or preview the print job as needed.
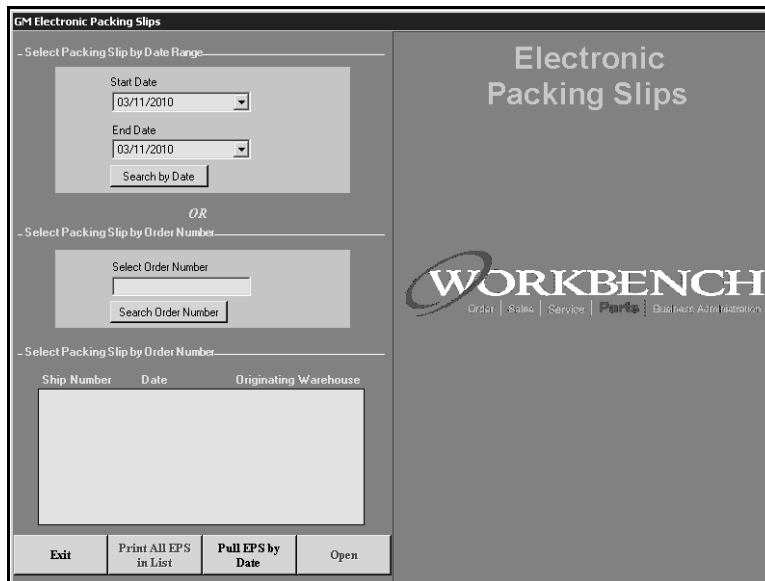
Chapter 5 Electronic Packing Slips

The Autosoft GM Parts Workbench application automatically retrieves packing slips every night so they are ready for you each morning. You will use these packing slips to receipt your order when it arrives. Once you use the packing slip to receipt the order, you update the order in your Autosoft DMS system.

> **Tip:** Electronic packing slips are archived 60 days after the ship date. You can view archived packing slips using the **Archive** option on the GM Setup Parameters menu. See Chapter 9 "Archives" for information about viewing archived files.

Viewing a Packing Slip

1. Click **Electronic Packing Slips**. The GM Electronic Packing Slips screen appears.

2. You can search by date or by control number.

    To search by date, use the **Start Date** and **End Date** drop-down calendars to select the date range for the search. Click **Search by Date** to continue.

    To search by control number, type the purchase order number, and click **Search Order Number** to continue.

3. The window on the bottom left side of the screen lists all the packing slips that match your search criteria.

4. At this point, you can click **Print All EPS In List** to print all slips that appear in the search list.

5. Click a slip in the list, and click **Open**. The packing slip displays on your screen.

6. Print the slip, and match it against the physical order that arrived.

Pulling new Packing Slips from GM

1. Click **Electronic Packing Slips**. The GM Electronic Packing Slips screen appears

2. Click **Pull EPS by Date**.

3. Use the drop-down calendar to select the date for the search, and click **Select**.

4. The system connects to GM and pulls any packing slips with the date you specified. The window on the bottom left side of the screen lists the packing slips pulled from GM. Click a slip in the list, and click **Open**. The packing slip displays on your screen.

5. Print the slip, and match it against the physical order that arrived.

Previewing a Packing Slip

1. Search for a packing slip, or pull a new packing slip as explained in the previous sections.

2. Select the packing slip, and click **Open**.

3. Click **Print Preview** on the bottom of the packing slip screen.

4. A summary of the packing slip opens on your screen. The same information displayed on the packing slip screen displays on the print preview.

5. To print the packing slip from the summary screen, click the Print icon on the toolbar, or click **File** and select **Print**.

6. To close the preview screen, click the X in the top right corner, or click **File** and select **Exit**.

Printing a Packing Slip

1. Search for a packing slip, or pull a new packing slip as explained in the previous sections.

2. Select the packing slip, and click **Open**.

3. Click **Print** on the bottom of the packing slip screen.

4. In the Print dialog, select the printer, and click **Print**.

Chapter 6 Order Invoice

Use Order Invoice feature to print order invoices. In addition to viewing individual invoices, you can view a weekly or monthly statement. The screen will automatically display the available invoices retrieved by the system. You can pull new invoices as needed. Please note that invoices are not available for the current day; they are available the next day. For example, invoices for January 1 will not be available until January 2.

When viewing the invoices on screen, two tabs display information. The **General** tab displays the accounting information for the order, and the **Summary** tab displays the part and shipping information for the order. (The **Summary** tab is not available when viewing weekly statements.)

The top of both tabs displays the customer code, invoice number, invoice date, and payment terms. The bottom of both tabs displays the "Ship To" information, invoice due date, number of parts on the invoice, net merchandise amount, taxes applied, and the net invoice amount.
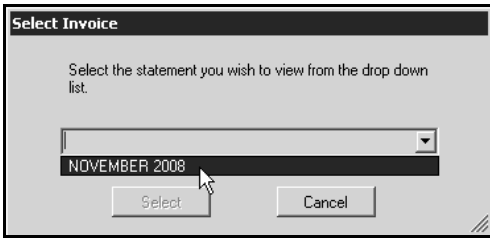
Tip: Order Invoices are archived 60 days after the ship date. You can view archived invoices using the **Archive** option on the GM Setup Parameters menu. See Chapter 9 "Archives" for information about viewing archived files.

Viewing a Monthly Statement

1. Click **Order Invoice**. The GM Parts Invoice screen appears.
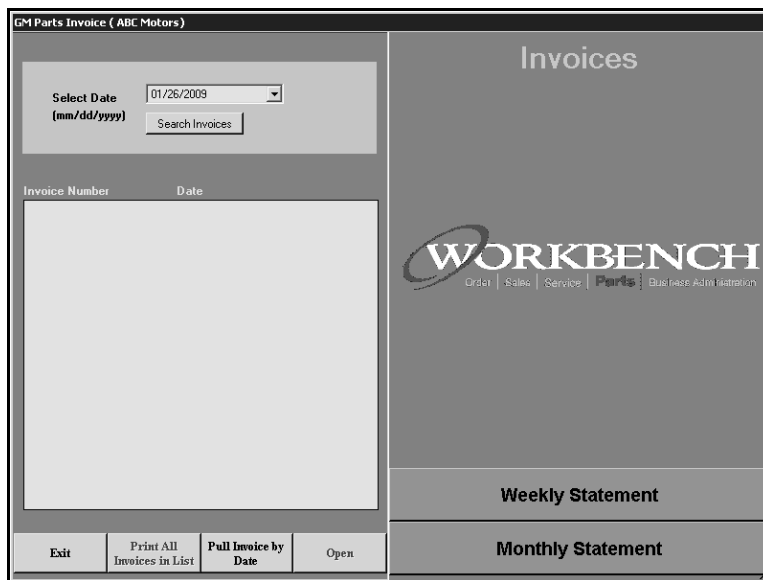
2. Click **Monthly Statement** on the right side of the menu.

3. From the Select Invoice list, click the invoice you want to view, and click **Select**.

4. The invoice displays on your screen. The **General** tab displays the accounting information for the order.

5. The **Summary** tab displays the part and shipping information for the order.

6. Click **Exit** to close the screen.

Viewing a Weekly Statement

1. Click **Order Invoice**. The GM Parts Invoice screen appears.

2. Click **Weekly Statement** on the right side of the menu.

3. From the Select Invoice list, click the invoice you want to view, and click **Select**.

4. The invoice displays on your screen. The **General** tab displays the accounting information for the order. This is the only information available for the weekly invoice.

5. Click **Exit** to close the screen.

Viewing an Invoice for a Specific Date

1. Click **Order Invoice**. The GM Parts Invoice screen appears.

2. Use the **Select Date** drop-down calendar to select the invoice date.

3. Click **Search Invoices**. The window on the bottom left side of the screen lists all the invoices that match the date.

4. Click an invoice in the list, and click **Open**. The invoice displays on your screen. The **General** tab displays the accounting information for the order, and the **Summary** tab displays the part and shipping information for the order.

5. Click **Exit** to close the screen.

Pulling new Invoices from GM

1. Click **Order Invoice**. The GM Parts Invoice screen appears.

2. Click **Pull Invoice by Date**.

3. Use the drop-down calendar to select the date for the search, and click **Select**.

4. The system connects to GM and pulls any invoices with the date you specified.

5. The window on the bottom left side of the screen lists the invoices pulled from GM.

6. At this point, you can also click **Print All Invoices in List** to print all the invoices that appear in the search list.

7. Click an invoice in the list, and click **Open**. The invoice displays on your screen.

Previewing an Invoice

1. Search for an invoice, or pull a new invoice as explained in the previous instructions.

2. Select the invoice, and click **Open**.

3. Click **Print Preview** on the bottom of the invoice screen.

4. A summary of the invoice opens on your screen. The same information displayed on the invoice screen displays on the print preview.

5. To print the invoice from the summary screen, click the **Print** icon on the toolbar, or click **File** and select **Print**.

6. To close the preview screen, click the **X** in the top right corner, or click **File** and select **Exit**.

Printing an Invoice

1. Search for an invoice, or pull a new invoice as explained in the previous sets of instructions.

2. Select the invoice, and click **Open**.

3. Click **Print** on the bottom of the invoice screen.

4. In the Print dialog, select the printer, and click **Print**.

5. Both the General and Summary information print.

Chapter 7 Returns and Claims

The Returns and Claims menu is where you send return files and claims. In addition, you can inquire on a return or claim from this menu.

GM Parts Returns & Claims (ABC Motors)

- Return Entry
- Return Inquiry
- Material Balance
- Claim Entry
- Claim Inquiry
- Material Returns Answerbacks
- Exit

Returns & Claims

WORKBENCH
Order | Sales | Service | Parts | Business Administration
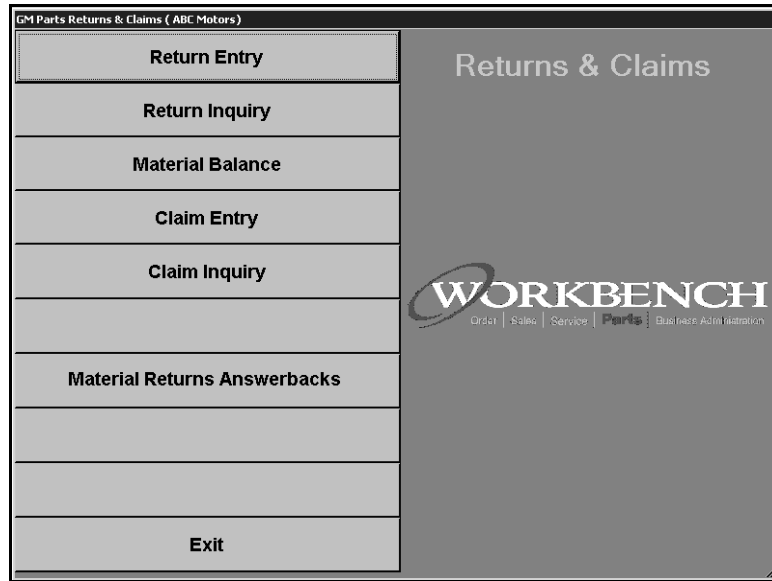
Submitting Returns

The **Return Entry** option advances you to the Returns menu. You use this menu to send returns to GM. There are six return options. Each option corresponds to a specific return type.

GM Parts Returns (ABC Motors)

- Mixed Returns
- Monthly Return Plan
- Termination Plan
- Core Return Plan
- Concealed Damage
- CSO Returns
- Exit

Returns

WORKBENCH
Order | Sales | Service | Parts | Business Administration
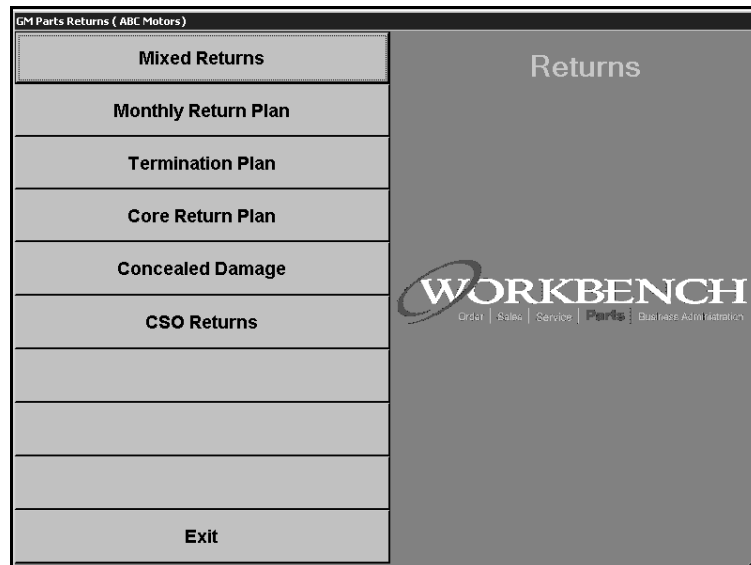
Submitting Mixed Returns

Use the **Mixed Returns** option for mixed returns. These are type **00** returns. This includes material return types **03** (Packaged Incorrectly), **07** (New Defective), **08** (Shipped in Error), and **15** (Container Damaged).

> **Note:** The **Import Return** and **Save** buttons on the Return screens are not currently active. They will become active once Autosoft adds the ability to pull returns from your Autosoft DMS system into GM Parts Workbench.

1. Click **Mixed Returns**. The GM Parts Mixed Returns screen appears.

2. The **Return Code** automatically defaults to **00-Mixed Returns**.

3. Type the application number for the return in the **Application No.** field. The system automatically performs a check to verify that the application number has not been used within the last 365 days. If the application number has been used within the 365-day period, the system will display a message indicating you must use a different number.

4. Use the **Notes** field to add any notes that need to be sent with the return.

5. Add part to the return using the fields in the middle of the screen. The following fields are required before you can add parts to the return: **MR Type**, **Part Number**, **Quantity**, **PDC**, **GM Order Number**, and **Order Line Number**.

6. Once you enter information in the required fields, the **Next Part** button will become active. Click **Next Part** to add the part to the order and to clear the entry fields for the next part. You will see the part in the parts list on the bottom of the screen. A part has not been added to the order until you click **Next Part** and the part appears in the parts table.

7. Continue to add parts as needed. Use the **Clear** button to clear part information from the fields.

8. Click **Send Return**. The program connects to GM and sends the return. Note that this button will not be active until you have entered a valid application number and have added at least one part to the return.

9. When the return has been sent, you will see a messages indicating the return has been successfully sent. The message will indicate the value of the return, the number of lines, the total units, and the total lines that are not priced. Click **OK** to close the message.

Previewing the Return

1. Click **Print Preview**.

2. A summary of the return displays on screen.

3. To print the return, click the **Print** icon on the toolbar, or click **File** and select **Print**.

4. To close the preview screen, click the **X** in the top right corner, or click **File** and select **Exit**.

Printing the Return

1. Make sure the correct return is displayed on the screen.

2. Click **Print**.

3. In the Print dialog, select the printer, and click **Print**.

Submitting Monthly Return Plans

Use the Monthly Return Plan option for monthly returns. These are type 01 returns.

1. Click **Monthly Return Plan**. The GM Monthly Return Plan screen appears.

2. The **Return Code** automatically defaults to **01-Monthly Return Plan**.

3. Type the application number for the return in the **Application No.** field. The system automatically performs a check to verify that the application number has not been used within the last 365 days. If the application number has been used within the 365-day period, the system will display a message indicating you must use a different number.

4. Use the **Notes** field to add any notes that need to be sent with the return.

5. Add part to the return using the fields in the middle of the screen. The following fields are required before you can add parts to the return: **Part Number** and **Quantity**.

6. Once you enter information in the required fields, the **Next Part** button will become active. Click **Next Part** to add the part to the order and to clear the entry fields for the next part. You will see the part in the parts list on the bottom of the screen. A part has not been added to the order until you click **Next Part** and the part appears in the parts table.

7. Continue to add parts as needed. Use the **Clear** button to clear part information from the fields.

8. Click **Send Return**. The program connects to GM and sends the return. Note that this button will not be active until you have entered a valid application number and have added at least one part to the return.

9. When the return has been sent, you will see a messages indicating the return has been successfully sent. The message will indicate the value of the return, the number of lines, the total units, and the total lines that are not priced. Click **OK** to close the message.

Previewing the Return

1. Click **Print Preview**.

2. A summary of the return displays on screen.

3. To print the return, click the **Print** icon on the toolbar, or click **File** and select **Print**.

4. To close the preview screen, click the **X** in the top right corner, or click **File** and select **Exit**.

Printing the Return

1. Make sure the correct return is displayed on the screen.

2. Click **Print**.

3. In the Print dialog, select the printer, and click **Print**.

Submitting Termination Plans

Use this option for termination returns. These are type 02 returns.

1. Click **Termination Plan**. The Termination Plan screen appears.

2. The **Return Code** automatically defaults to **02-Termination Plan**.

3. Type the application number for the return in the **Application No.** field. The system automatically performs a check to verify that the application number has not been used within the last 365 days. If the application number has been used within the 365-day period, the system will display a message indicating you must use a different number.

4. Use the **Notes** field to add any notes that need to be sent with the return.

5. Add part to the return using the fields in the middle of the screen. The following fields are required before you can add parts to the return: **Part Number** and **Quantity**.

6. Once you enter information in the required fields, the **Next Part** button will become active. Click **Next Part** to add the part to the order and to clear the entry fields for the next part. You will see the part in the parts list on the bottom of the screen. A part has not been added to the order until you click **Next Part** and the part appears in the parts table.

7. Continue to add parts as needed. Use the **Clear** button to clear part information from the fields.

8. Click **Send Return**. The program connects to GM and sends the return. Note that this button will not be active until you have entered a valid application number and have added at least one part to the return.

9. When the return has been sent, you will see a messages indicating the return has been successfully sent. The message will indicate the value of the return, the number of lines, the total units, and the total lines that are not priced. Click **OK** to close the message.

Previewing the Return

1. Click **Print Preview**.

2. A summary of the return displays on screen.

3. To print the return, click the **Print** icon on the toolbar, or click **File** and select **Print**.

4. To close the preview screen, click the **X** in the top right corner, or click **File** and select **Exit**.

Printing the Return

1. Make sure the correct return is displayed on the screen.

2. Click **Print**.

3. In the Print dialog, select the printer, and click **Print**.

Submitting Core Return Plans

Use this option for core returns. These are type 04 returns.

1. Click **Core Return Plan**. The Core Return screen appears.

2. The **Return Code** automatically defaults to **04-Core Return**.

3. Type the application number for the return in the **Application No.** field. The system automatically performs a check to verify that the application number has not been used within the last 365 days. If the application number has been used within the 365-day period, the system will display a message indicating you must use a different number.

4. Enter the appropriate ID in the **Core ID** field.

5. Use the **Notes** field to add any notes that need to be sent with the return.

6. Add part to the return using the fields in the middle of the screen. The following fields are required before you can add parts to the return: **Part Number** and **Quantity**.

7. Once you enter information in the required fields, the **Next Part** button will become active. Click **Next Part** to add the part to the order and to clear the entry fields for the next part. You will see the part in the parts list on the bottom of the screen. A part has not been added to the order until you click **Next Part** and the part appears in the parts table.

8. Continue to add parts as needed. Use the **Clear** button to clear part information from the fields.

9. Click **Send Return**. The program connects to GM and sends the return. Note that this button will not be active until you have entered a valid application number, core ID, and have added at least one part to the return.

10. When the return has been sent, you will see a messages indicating the return has been successfully sent. The message will indicate the value of the return, the number of lines, the total units, and the total lines that are not priced. Click **OK** to close the message.

Previewing the Return

1. Click **Print Preview**.

2. A summary of the return displays on screen.

3. To print the return, click the **Print** icon on the toolbar, or click **File** and select **Print**.

4. To close the preview screen, click the **X** in the top right corner, or click **File** and select **Exit**.

Printing the Return

1. Make sure the correct return is displayed on the screen.

2. Click **Print**.

3. In the Print dialog, select the printer, and click **Print**.

Submitting Concealed Damage

Use this option for concealed damage returns. These are type 06 returns.

1. Click **Concealed Damage**. The Concealed Damage screen appears.

2. The **Return Code** automatically defaults to **06-Concealed Damage**.

3. Type the application number for the return in the **Application No.** field. The system automatically performs a check to verify that the application number has not been used within the last 365 days. If the application number has been used within the 365-day period, the system will display a message indicating you must use a different number.

4. Use the **Notes** field to add any notes that need to be sent with the return.

5. Add part to the return using the fields in the middle of the screen. The following fields are required before you can add parts to the return: **Part Number**, **Quantity**, **PDC**, **GM Order Number**, **Order Line Number**, and **Notes**.

6. Once you enter information in the required fields, the **Next Part** button will become active. Click **Next Part** to add the part to the order and to clear the entry fields for the next part. You will see the part in the parts list on the bottom of the screen. A part has not been added to the order until you click **Next Part** and the part appears in the parts table.

7. Continue to add parts as needed. Use the **Clear** button to clear part information from the fields.

8. Click **Send Return**. The program connects to GM and sends the return. Note that this button will not be active until you have entered a valid application number, core ID, and have added at least one part to the return.

9. When the return has been sent, you will see a messages indicating the return has been successfully sent. The message will indicate the value of the return, the number of lines, the total units, and the total lines that are not priced. Click **OK** to close the message.

Previewing the Return

1. Click **Print Preview**.

2. A summary of the return displays on screen.

3. To print the return, click the **Print** icon on the toolbar, or click **File** and select **Print**.

4. To close the preview screen, click the **X** in the top right corner, or click **File** and select **Exit**.

Printing the Return

1. Make sure the correct return is displayed on the screen.

2. Click **Print**.

3. In the Print dialog, select the printer, and click **Print**.

Submitting CSO Returns

Use this option for CSO returns. These are type 11 returns.

1. Click **CSO Returns**. The CSO Returns screen appears.

2. The **Return Code** automatically defaults to **11-CSO Returns**.

3. Type the application number for the return in the **Application No.** field. The system automatically performs a check to verify that the application number has not been used within the last 365 days. If the application number has been used within the 365-day period, the system will display a message indicating you must use a different number.

4. Enter the appropriate ID in the **Core ID** field.

5. Use the **Notes** field to add any notes that need to be sent with the return.

6. Add part to the return using the fields in the middle of the screen. The following fields are required before you can add parts to the return: **Part Number**, **Quantity**, **PDC**, **GM Order Number**, and **Order Line Number**.

7. Once you enter information in the required fields, the **Next Part** button will become active. Click **Next Part** to add the part to the order and to clear the entry fields for the next part. You will see the part in the parts list on the bottom of the screen. A part has not been added to the order until you click **Next Part** and the part appears in the parts table.

8. Continue to add parts as needed. Use the **Clear** button to clear part information from the fields.

9. Click **Send Return**. The program connects to GM and sends the return. Note that this button will not be active until you have entered a valid application number, core ID, and have added at least one part to the return.

10. When the return has been sent, you will see a messages indicating the return has been successfully sent. The message will indicate the value of the return, the number of lines, the total units, and the total lines that are not priced. Click **OK** to close the message.

Previewing the Return

1. Click **Print Preview**.

2. A summary of the return displays on screen.

3. To print the return, click the **Print** icon on the toolbar, or click **File** and select **Print**.

4. To close the preview screen, click the **X** in the top right corner, or click **File** and select **Exit**.

Printing the Return

1. Make sure the correct return is displayed on the screen.

2. Click **Print**.

3. In the Print dialog, select the printer, and click **Print**.

Performing a Return Inquiry

The Autosoft GM Parts Workbench application performs an inquiry on your open returns each night. You can view this information at any time. You can also run a new inquiry that will connect to GM and pull current information about your open returns. You will also see this screen if you select to view the inquiry after submitting a return.

Viewing a Return

Viewing return information displays the information currently stored in the system. This is not necessarily the most current information for the return. To view the most current information, pull a new inquiry from GM.

1. To view information for a specific return, type the application number and/or select the DOC type from the list. To view information for all returns, leave these fields blank.

2. Click **Search**. The window on the bottom left side of the screen lists all the claims that match the information.

3. Click a claim in the list, and click **Open**. The claim displays on your screen.

4. Click **Exit** to close the screen.

Pulling new Inquiries from GM

When you select to pull a new inquiry, the system connects to GM and pulls the most current information available for a return.

1. Type the application number and select the DOC Type for the return. In order to pull a new inquiry, you must complete these two fields.

2. Click **Pull Returns**.

3. The system connects to GM and pulls any returns with the date you specified.

4. The window on the bottom left side of the screen lists the returns pulled from GM. Click a return in the list, and click **Open**.

5. The return displays on your screen.

Previewing an Inquiry

1. Search for a return, or pull a new return inquiry as explained in the previous sets of instructions.

2. Select the return, and click **Open**.

3. Click **Print Preview** on the bottom of the invoice screen. A summary of the return opens on your screen. The same information displayed on the return screen displays on the print preview.

4. To print the return from the summary screen, click the **Print** icon on the toolbar, or click **File** and select **Print**.

5. To close the preview screen, click the **X** in the top right corner, or click **File** and select **Exit**.

Printing an Inquiry

1. Search for a return, or pull a new return inquiry as explained in the previous sets of instructions.

2. Select the return, and click **Open**.

3. Click **Print** on the bottom of the return screen.

4. In the Print dialog, select the printer, and click **Print**.

Viewing Material Balance

The Material Balance screen retrieves information from GM. This information is for viewing only. You cannot edit any information on this screen.

1. Click **Material Balance**.

2. When the screen appears, the system automatically connects to GM. Once the information is available, it displays on the screen.

3. Use the **Print Preview** and **Print** buttons to print the information as needed.

4. Click **Exit** to close the screen.

Submitting Claim Entries

Use the **Claim Entry** option to send a claim for part shortage or part overage. You will need the original order information to complete the claim.

Submitting a Claim

1. Click **Claim Entry**. The GM Parts Claim Entry screen appears.

2. Type the application number for the return in the **Application No.** field. The system automatically performs a check to verify that the application number has not been used within the last 365 days. If the application number has been used within the 365-day period, the system will display a message indicating you must use a different number.

3. Fill in the remaining fields in the top part of the screen. The remaining information should be available from the original packing slip for the order.

4. Type the order number and line number from the original order.

5. Use the **Short Info** section to send a claim for a part shortage and the **Overage Info** section to send a claim for a part overage. Type the part number and quantity information.

6. For overages, indicate if you are returning the part or keeping the part. Select **Y** to return the part and **N** to keep the part.

7. Click **Next Part**. The part is added to the part list.

8. Continue to add parts as needed. Use the **Clear** button to clear part information from the fields.

9. Click **Send Claim**. The program connects to GM and sends the claim. Note that this button will not be active until you have entered a valid application number, ship facility, shipment number, and have added at least one part to the claim.

10. When the claim has been sent, you will see a messages indicating the claim has been successfully sent. The message will indicate the value of the claim, the number of lines, the total units, and the total lines that are not priced. Click **OK** to close the message.

Editing Part Information

1. Click the part in the part list.

2. Click in a field to edit the part number, quantity, or return information.

3. Click **Next Part** to save the changes.

Removing Parts from the Claim

1. Change the **Quantity** field to 0 (zero).

2. Click **Next Part** to save the changes.

3. Send the claim.

4. Parts with a quantity of 0, will not be sent on the claim.

Performing a Claim Inquiry

The Autosoft GM Parts Workbench application performs an inquiry on your open claims each night. You can view this information at any time. You can also run a new inquiry that will connect to GM and pull current information about your open claims. You will also see this screen if you select to view the inquiry after submitting a claim.

Viewing a Claim

Viewing claim information displays the information currently stored in the system. This is not necessarily the most current information for the claim. To view the most current information, pull a new inquiry from GM.

1. Click **Claim Inquiry**. The Claim Inquiry screen appears.

2. To view information for a specific claim, type the shipment number and/or PDC code for the claim. To view information for all claims, leave these fields blank.

3. Click **Search**. The window on the bottom left side of the screen lists all the claims that match the information.

4. Click a claim in the list, and click **Open**. The claim displays on your screen.

5. Click **Exit** to close the screen.

Pulling new Inquiries from GM

When you select to pull a new inquiry, the system connects to GM and pulls the most current information available for a claim.

1. Type the shipment number and PDC code for the claim. In order to pull a new inquiry, you must complete these two fields.

2. Click **Pull Claims**.

3. The system connects to GM and pulls any claims with the date you specified.

4. The window on the bottom left side of the screen lists the claims pulled from GM. Click a claim in the list, and click **Open**. The claim displays on your screen.

Previewing an Inquiry

1. Search for a claim, or pull a new claim inquiry as explained in the previous sets of instructions.

2. Select the claim, and click **Open**.

3. Click **Print Preview** on the bottom of the invoice screen.

4. A summary of the claim opens on your screen. The same information displayed on the claim screen displays on the print preview.

5. To print the claim from the summary screen, click the **Print** icon on the toolbar, or click **File** and select **Print**.

6. To close the preview screen, click the **X** in the top right corner, or click **File** and select **Exit**.

Printing an Inquiry

1. Search for a claim, or pull a new claim inquiry as explained in the previous sets of instructions.

2. Select the claim, and click **Open**.

3. Click **Print** on the bottom of the claim screen.

4. In the Print dialog, select the printer, and click **Print**.

Viewing the Material Return Answerbacks

The **Material Return Answerbacks** button allows you to pull and view the return answerbacks from General Motors. You can select the date range for the answerbacks you want to retrieve, so you can retrieve old answerbacks or new answerbacks.

Reviewing Old Answerbacks

You can search the answerback in history to review a previously pulled answerback. All you can do is review and print the information.

1. Use the drop-down calendars to select the Start Date and End Date.

2. Use the **Answerback Type** list to select the type of answerback you want to find: All, COS (Credit on Ship), CRR (Credit Reversal Reminder), or LCA (Light Core Authorization.

3. Click **Search**.

4. The window on the bottom of the screen will display the answerbacks in history for the specified date range.

5. At this point, you can click **Print All Answerbacks** to print all the answerbacks that appear in the search list.

6. To view an answerback, click the answerback in the list window, and click **Open** to view it.

<table>
<tr><td colspan="9">GM Parts MR Answerback ('Autosoft Test Account - 307262')</td></tr>
<tr><td colspan="9">Answerback Name: MR INPUT LIGHT CORE</td></tr>
<tr><td colspan="9">Application Number: DS-6091871   Answerback Date: 5/15/2009 11:08:02 AM</td></tr>
<tr><td colspan="9">No of Lines: 0   Application Date: 5/23/2009   Document Type: H</td></tr>
<tr><td colspan="9">Total: $126.00</td></tr>
<tr><td colspan="9">RAPID CORE EXCHANGE
DO NOT SHIP UNTIL EACH PIECE IS LABELED WITH RELEVANT CORE TAG
STAPLE THIS DOCUMENT TO YOUR FREIGHT BILL</td></tr>
</table>

Part Number	Exchange	Charge	Qty	Comments	Core Id	Core Gr
19112543	X	$63.00	1	COMMENT1	009723352	MAS
19112538	X	$63.00	1	COMMENT2	009723353	MAS

* * * * * SCRAP NOTICE * * * * *
MATERIAL RETURNED ON THIS APPLICATION, WHICH IS DETERMINED TO
BE INELIGIBLE FOR CORE CREDIT WILL NOT BE RETURNED TO THE
CUSTOMER. CUSTOMERS CANNOT CLAIM OWNERSHIP OF INELIGIBLE CORES
RETURNED AGAINST THIS APPLICATION.

Exit	Print Preview	Print

Pulling Material Return Answerbacks from GM

You can pull one material return answerback per day from GM. This allows you to pull new answerbacks for a specific date range (within the past 30 days) or old answerbacks.

1. Click **Get Answerbacks** to retrieve the answerback.

2. Use the **Pending Answerbacks** drop-down list to specify if you want to pull new answerbacks or old answerbacks. Select **Y** to pull new answerbacks or **N** to pull old answerbacks.

3. Use the drop-down calendars to select the Start Date and End Date.

4. Use the **Answerback Type** list to select the type of answerback you want to find: All, COS (Credit on Ship), CRR (Credit Reversal Reminder), or LCA (Light Core Authorization.

5. Click **Select**. The system connects to GM, retrieves the answerback, and displays it on the screen.

Previewing an Answerback

1. Search for the answerback, or pull a new answerback.

2. Select the answerback, and click **Open**.

3. Click **Print Preview** on the bottom of the invoice screen.

4. A summary of the answerback opens on your screen.

5. To print the answerback from the summary screen, click the **Print** icon on the toolbar, or click **File** and select **Print**.

6. To close the preview screen, click the **X** in the top right corner, or click **File** and select **Exit**.

Printing an Answerback

1. Search for the answerback, or pull a new answerback.

2. Select the claim, and click **Open**.

3. Click **Print** on the bottom of the claim screen.

4. In the Print dialog, select the printer, and click **Print**.

Chapter 8 Parts Info

The Parts Info feature allows you to view part information from General Motors. You can update the information viewed here to the current GM price tape on your system. The part list will hold the last 10 part numbers entered while working on the screen. The list is kept per computer and is cleared when you exit the screen.

If a "Price Tape Not Available" message appears when you attempt to pull part information, the price tape path is not set correctly in your Autosoft DMS. All users will need to exit Autosoft DMS, and the price tape path needs to be added to the **Path To OEM Parts Tape** field on the Miscellaneous Parts Parameters screen in the Parts Inventory setup (**Parts**>**Setup & Updates**>**Operating Defaults**). You should only have to edit the price tape path once as long as all users are out of Autosoft DMS when the edit is made.

Pulling Part Information

1. Click **Part Info**. The GM Parts Information screen appears.

2. Type the part number, or select the part number from the part list if it is already in the list. Remember, the part list hold the last 10 part numbers entered while working on the screen.

3. Click **Get Info**. The screen displays the part information. This information comes directly from GM.

4. If the part is not on the current price tape, you will receive a message to update the information to the price tape. Click **Update to Price Tape**.

Viewing Supersession Information

1. The Supersession section displays supersession for the part.

2. Click **View** to check your Autosoft DMS system for supersession.

Previewing the Information

1. Pull part information.

2. Click **Print Preview**.

3. A summary of the information displays on screen.

4. To print the order, click the **Print** icon on the toolbar, or click **File** and select **Print**.

5. To close the preview screen, click the **X** in the top right corner, or click **File** and select **Exit**.

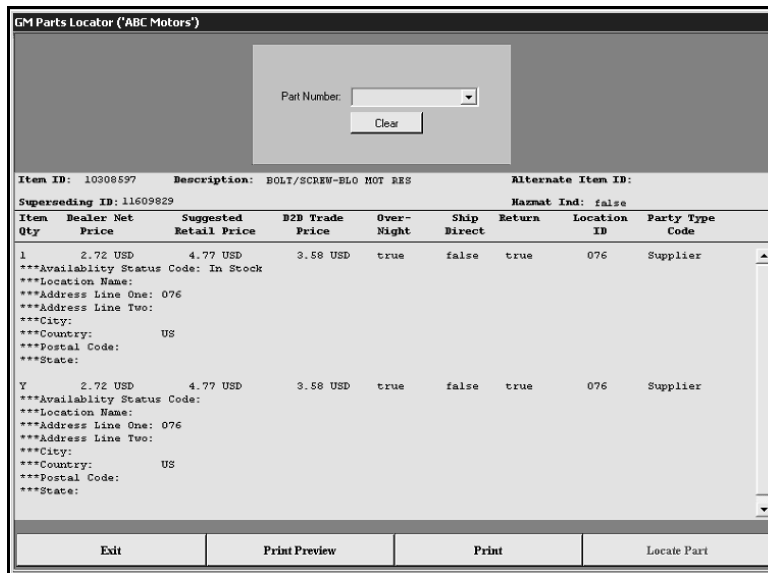# Printing the Information

1. Pull part information.

2. Click **Print**.

3. In the Print dialog, select the printer, and click **Print**.

Chapter 9 Locator

The locator finds parts in manufacturer warehouses. It does not perform a dealer-to-dealer search. The search will list the three closest warehouses that have the part you requested. The part list will hold the last 10 part numbers searched for based on the dealer code (specified in the GM Local Parameters).

Locating a Part

1. Click **Locator**. The GM Parts Locator screen appears.

2. Type the part number, or select the part number from the part list if it is already in the list. Remember, the part list will hold the last 10 part numbers entered.

3. Click **Locate Part**. The screen displays the information for the three closest warehouses that have the part (if applicable). The warehouse ID is displayed in the Location ID column.

4. The first warehouse listed is the closest warehouse to your dealership. The entry for this warehouse identifies the on-hand quantity for the part. For the other warehouses, the quantity will just display "Y" to indicate that the warehouses have the part.

5. The screen also lists the pricing and shipping information for each warehouse.

Previewing the Information

1. With the locator information displayed on the screen, click **Print Preview**.

2. A summary of the information displays on screen. The same information displayed on the locator screen displays on the print preview.

3. To print the information, click the **Print** icon on the toolbar, or click **File** and select **Print**.

4. To close the preview screen, click the **X** in the top right corner, or click **File** and select **Exit**.

Printing the Information

1. With the locator information displayed on the screen, click **Print**.

2. In the Print dialog, select the printer, and click **Print**.

Chapter 10 Archives

The archives allow you to view closed documents. Orders are closed once all lines on the order have been filled and invoiced. Once closed, orders are automatically archived. Electronic packing slips and invoices are archived 60 days after the ship date and invoice date. Once closed and archived, you can only view order information in the archives. The archives hold order information indefinitely, so you will always have records of your orders. You can search for documents based on a control number and/or date.

Viewing Archives

1. Click **Setup and Utilities**. The GM Setup Parameters menu appears.

2. Click **View Archive**. The View Archive screen appears.

3. Type the order number, shipment number, or invoice number you want to find. If you want to search strictly based on a date, leave this field blank.

4. If you want to search for a specific date, click to select the box in front of the date field. Use the drop-down calendar to select the date.

5. Next, specify what type of document you want to find: orders, packing slips (EPS), or invoices. Click to select the corresponding boxes. You can select multiple boxes, but at least one box must be selected.

6. Click **Search**.

7. The results will display in the appropriate window on the bottom of the screen.

8. Click the document you want to view, and click **Open**. The document displays on your screen. The viewing screen will be identical to the viewing screen used to view current orders, electronic packing slips, and invoices.

9. Click **Exit** on the viewing screen to close the archive when you are finished viewing it.

Printing the Archive

1. Pull the archive you want to print as explained in the previous section.

2. Click **Print** on the bottom of the display screen.

3. In the Print dialog, select the printer, and click **Print**.

Conclusion

This completes the information needed to use your Autosoft GM Parts Workbench program. You should keep this manual on hand until you are familiar with the processes. If you have questions when you are working in the program, call Autosoft International at (800) 473-4630, and an Autosoft Support Desk Representative will assist you.