




## Part II Desk Manager

## Chapter 4 Desk Manager Overview and Setup

The Desk Manager module is useful to the Sales Department because it allows you to manage your inventory and sales. In addition to viewing inventory, you can print “Get Ready” checklists, window stickers, and buyers guides for any vehicle in your inventory. When customers come in to the dealership to purchase a vehicle, you can use the FasFind to quickly locate the vehicle that meets their desired criteria. Then, you use the FasQuote to calculate customer payments and FasDeal to record the sale information. Sales reports help you track sales, commission, and inventory.



**Tip:** Throughout the Desk Manager module you will see  next to the **VIN** field. Click this icon or press F10 to view the VIN decoding data. This provides detailed information about the vehicle based on the VIN.

### Minimizing the Desk Manager

Once you open the Desk Manager module, you can minimize it by clicking **Minimize** on the Desk Manager menu. This allows you to keep the program open while you work on other things. When you need to use the program, click the Desk Manager item on your taskbar at the bottom of your screen. This gives you instant access to the program whenever you need it.



**Tip:** Do not open the Autosoft FLEX DMS program again when you minimize the Desk Manager module. Running two copies of Autosoft FLEX DMS may cause errors.

## Selecting Print Criteria

When you select to print in certain areas of the Desk Manager module, you have the option of viewing the information on your screen or printing it to paper. When the system prompts you 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**.



Printing to screen allows you to preview the information before printing it to paper, which may be useful when printing lengthy lists and reports. If you select to print the information to your screen, you can print the information from the viewing screen by clicking **File** and **Print**. To exit the viewing screen, click **File** and **Exit**.

**Remember:** You can only print to laser printers in Autosoft FLEX DMS version 6.6.

## Setup

Before you use the Desk Manager module, you must enter setup information. Click **Setup** to open the System Setup menu. This menu provides 10 options that allow you to enter default information that determines how the Desk Manager module works.

System Setup	
Standard Fees/Parameters	System Setup
Finance Rates	Salesman Information
Model Codes / Average Grosses	Buyers Guide Text
Customer Reactor Text	Vehicle Options (Used)
Commission Parameters	Vehicle Options (New)
Exit	'Get Ready' Text

## Standard Fees/Parameters

Use this button to open the Miscellaneous Fees screen to enter the default values for various fees and state sales tax information. The system uses the information on this screen when you create a quote and deal. Entering the information here saves you the trouble of having to manually calculate sales tax and fees.

The screenshot shows the 'Miscellaneous Fees' window with the following data:

Title Fee:	25.00	Encumbrance Fee:	10.00
Registration Fee:	36.00	Processing Fee:	40.00
Transfer Fee:	10.00	Pre-Paid Fees (N):	5.00
Rustproofing:	100.00	Other Add On (Taxable):	5.00

State Sales Tax Rate: 7.00%

Vehicle Tax Structure {1/2/3}: 1 (1)-Cash Difference New & Used  
(2)-Cash Difference New Only  
(3)-Full Price New & Used

Are Rebates Taxed (Y/N): Y

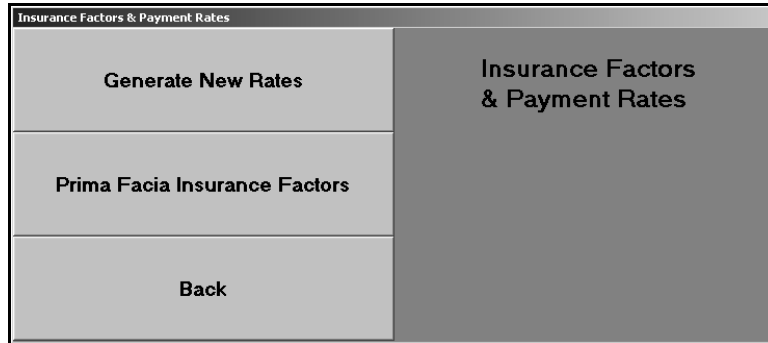
'Pack' the Displayed Payments on the FasQuote Screen With: \$ 10

If the MSRP is Missing Calculate MSRP Using Cost Plus: 30%

1. Click **Standard Fees/Parameters**. The Miscellaneous Fees screen appears.
2. The eight fields in the top section list the various fees. For each fee, type the amount your dealership charges. The system automatically figures the fees due (determined by a straight sale versus a sale with a trade in) and calculates the total fees due for the sale.
3. Use the **State Sale Tax Rate** field to specify your state sales tax percentage. The system automatically uses the value you enter to calculate the sales tax for the deals. If necessary, you can edit the sales tax when you are entering the deal.
4. In **Vehicle Tax Structure**, type the number that corresponds to the tax structure you want to use. The screen lists the tax structures next to the field for your reference.
5. Next, indicate if your state taxes rebates. Type **Y** for yes or **N** for no.
6. In **'Pack' the Displayed Payments on the FasQuote Screen With**, type the dollar amount you want to use as the incremental value when you are generating quotes. For example, if you enter 10, you can increase and decrease the payment by \$10.
7. The last field allows you to enter a percentage the system will use to calculate the manufacturer's suggested retail price if it is missing from a vehicle's inventory file. The missing MSRP will be the vehicle cost plus the percentage you specify.
8. Click **Save** to save the information. The system returns you to the System Setup menu. You can return to this screen to edit the values as needed.

## Finance Rates

This button advances you to the Insurance Factors & Payment Rates menu. Use this menu to generate rates and to enter insurance factors. The system uses the information you specify here to calculate payments that include insurance for quotes and deals. If you do not generate and enter the Prima Facia Rates, the FasDeal and FasQuote will not function properly. You can obtain your Prima Facia rates from either your F&I person or your insurance company.



### Generate New Rates

Use this button to generate a complete set of rates from .05% to 21% in .05 increments.

1. Click **Generate New Rates**.
2. Click **OK** when prompted to verify you want to generate the rates. The system displays the rates on the screen as it generates them.

### Prima Facia Insurance Factors

Use this button to open the Insurance Factors screen to enter deviations and payments for life, joint life, and disability.

1. Click **Prima Facia Insurance Factors**.
2. In **Deviation**, type the percentage you want to use.
3. Then, enter the payment amount for each term. The number next to each field indicates the number of months for financing. The terms range from 6 to 180 months.
4. Click **Save** to save the information. The system returns you to the System Setup menu.

## Model Codes/Average Grosses

Use this button to enter model codes and average grosses that will be used when you enter a vehicle purchase. The screen automatically pulls the model code information entered in the Accounting Vehicle Purchase Parameters. However, you can add information as needed. You can obtain model codes from the factory invoice sticker. You may enter up to 50 model codes per car line.

Line	Model	Body	Avg Gross	Incentive
01	CAVALIER	COUPE	850.00	.00
02				
03				
04				
05				
06				
07				
08				
09				
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				
21				
22				
23				
24				
25				
26				
27				
28				
29				
30				
31				
32				
33				

1. Click **Model Codes/Average Grosses**. The Vehicle Model Codes screen appears.
2. Type the car line, or select the car line for the drop-down list.
3. To add a new model, type the line number you want to assign the code in **List Line**, or click the line in the list window on the right side of the screen.
4. In **Model Code**, type the code for the model you are entering.
5. In **Model**, type the model name. Be consistent when entering the names.
6. Use the **Body** field to indicate the body style for the model (coupe, sedan, etc.).
7. In **Avg Gross**, type the amount you hope to gross per car for this particular model. The system assists you as you work on the FasDeal screen to ensure you meet this gross. The FasDeal screen displays a face that smiles when you to meet or exceed this gross and frowns when the gross goes below this value. If you do not set the gross here, the system calculates the desirable gross as 5% of the vehicle's MSRP. If this comes to less than \$850, the system will use \$850 instead.
8. Use the **Dealer** and **Customer Incentive** fields to enter the amount of the dealer incentive and customer incentive for each model.
9. Click **Save** to save the line/model. The line/model is added to the list window on the right side of the screen. Continue to add lines/models as needed.
10. When you are ready to work with another car line, type the car line, or select the car line from the drop down list. Add models to the car line as needed.
11. Click **Exit** to close the screen when you are finished.

## Customer Reactor Text

Use this button to open the Reactor Text screen to enter text you can use to record useful information during a deal. You can enter up to nine reactor text sets, and each set can contain 20 lines of text. The text can be questions you want to ask the customer, information you want to pencil in for the customer, or anything else you want to enter on this screen. When you print the information for the deal from the FasDeal screen, you specify which reactor text you want to print with payment information.

The screenshot shows a window titled "Reactor Text". At the top, there is a field "Reactor Number:" with the value "0" entered. Below this are several rows of text input fields, each with a dollar sign (\$) on the right. The fields are: "Retail Factory Discount", "Retail Consumer Rebate", "Total Discounts On This Vehicle", "Enter Down Payment", "Blue Book or N.A.D.A. Estimate For Trade", and "Desired Monthly Payment With Cash Down". There is also a note "(Local Banks May Require 1/3 Down)" under the "Enter Down Payment" field. At the bottom of the window, there are two buttons: "Back" on the left and "Save" on the right.

**Tip:** Reactor Number 0 (zero) is a preloaded reactor text. You can keep the text or edit it to meet your dealership's needs.

## Adding Reactor Text

1. Click **Customer Reactor Text**.
2. Type a number for the reactor text set you are going to create. The number becomes the ID for the reactor text. You specify which text prints by entering the number you assigned the text on this screen.
3. Type the text you want to print on each line. Each line holds up to 70 characters. You must press ENTER to force line breaks as you type, or the text will not print correctly.
4. When you are finished entering the text, click **Save**. The screen clears so you can create another reactor text.
5. Click **Back** to close the screen when you are finished.

## Editing Reactor Text

You cannot delete reactor text. Instead, you can edit the text.

1. Type the ID number for the reactor text. The text fills in on the screen.
2. Click a line, and edit the information as needed.
3. Click **Save** to save the changes.

## Commission Parameters

The commission parameters allow you to enter descriptions for items used to calculate commission. The descriptions you enter on this screen fill in on the Salesman Commissions screen. You use the Commission screen in Desk Manager as a reference sheet after the deal is completed. The financial information pulls from Accounting once the deal is posted.

The system comes with default descriptions. You can leave these descriptions or edit them. However, you cannot edit fields **1, 2, and 3** under **Sales Cost Descriptions**. If you enter your own descriptions for the remaining fields, you can restore the system's default descriptions at any time by clicking **Defaults**.

The screenshot shows the 'Salesman Pay Parameters' window with three columns of input fields:

- Sales Cost Descriptions:** 1: Invoice, 2: Internals, 3: Dealer Pack, 4: Warranty Pack, 5: Radio/Tape, 6: Flaps/Bed Liner, 7: Moldings/Guards, 8: Stripes, 9: Other.
- Dealer Cost Descriptions:** 1: Rustproof, 2: Ext. Gloss, 3: Int. Fabric, 4: Warr. Upgrade, 5: Other, 6: (empty).
- Flat Commission Descriptions:** 1: Rustproof, 2: Ext. Gloss, 3: Int. Fabric, 4: Warr. Upgrade, 5: Finance, 6: Credit Life, 7: Credit A & H, 8: Other, 9: (empty).

Buttons at the bottom: Back, Defaults, Save.

1. Click **Commission Parameters**. The Salesman Pay Parameters screen appears.
2. Default information automatically fills in on the screen. The label for each section indicates if the lines apply to the sales cost, dealer cost, or flat commission. If you are going to add a description, make sure you add it under the correct heading. The text for the first three sales cost lines is red to remind you that you cannot edit these lines. The descriptions are hard coded in the system.
3. To edit a line, click in the field, and type the description you want to use. Each line holds up to 15 characters. At anytime, you can click **Defaults** to load the default entries.
4. Click **Save** to save the information. The system returns you to the System Setup menu.



## Salesman Information

You use the Salesman Information screen to add salespeople to the system. The Accounting, CSI/SSI, Desk Manager, and Traffic modules share a common sales database. Therefore, all salespeople entered in any of these modules are automatically added to the sales database, and the information for the salespeople can be viewed or edited from any of these modules. Once you start using the system, you can use this screen to view sales statistics. The fields at the bottom of the screen will display the monthly and year-to-date sales statistics for each salesperson.

Salesman Information

Salesman Code:

Name:

Phone:

Closing Ratio Goal:

Last Month ... Year To Date ...

Gross: <input type="text" value=".00"/>	Gross: <input type="text" value=".00"/>
Sales: <input type="text"/>	Sales: <input type="text"/>
Ups: <input type="text"/>	Ups: <input type="text"/>
Ratio: <input type="text" value=".00%"/>	Ratio: <input type="text" value=".00%"/>

01 HOUSE DEALS  
02 STEPHEN WILLIAMS  
03 ROGER SIERRA  
04 SHANNON WRIGHT  
05 PETER REED  
06 ADAM CARTWRIGHT

Exit Print Save Clear Delete

## Adding a New Salesperson

1. Click **Salesman Information**.
2. In **Salesman Code**, assign the salesperson a two-digit code/ID number.
3. Type the salesperson's name, phone number, and closing ratio goal.
4. Click **Save**. The salesperson is added to the list window on the right side of the screen.
5. Click **Exit** to close the screen when you are finished.

## Editing an Existing Salesman's Information

1. Click the salesperson in the list on the right side of the screen.
2. Click in a field, and edit the information as needed.
3. Click **Save** to save the changes.

## Printing the Salesman List

You can print a list of salespeople entered in the system. The list prints each salesperson's ID, name, and phone number.

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

## Deleting a Salesman

Remember, this removes the salesperson from Accounting, CSI/SSI, and Traffic, too.

1. Select the salesperson.
2. Click **Delete**.
3. Click **OK** when prompted to verify you want to delete the record.

## Buyers Guide Text

Use this button to open the Buyers Guide Text screen to enter the information you want to print on the buyers guide. You can create nine buyers guide sets. You can print the buyers guide through the Buyers Guide option on the Desk Manager main menu.

The screenshot shows the 'Buyers Guide Text' window. At the top, there are several checkboxes and input fields: 'Parameter Set' (1), 'Print Start Line' (10), 'As Is-No Warranty (X)' (checked), 'Warranty (X)' (unchecked), 'Full (X)' (unchecked), 'Limited (X)' (unchecked), 'Labor' (z), and 'Parts' (z). Below these are two tables: 'Systems Covered' and 'Duration', both with one row containing 'AS IS NO WARRANTY'. At the bottom, there is a 'Satisfaction Professional Name' field with 'Janes Williams' entered. A row of buttons at the bottom includes 'Exit', 'Print', 'Delete', 'Clear Screen', and 'Save'.

**Tip:** You can only print buyers guides on laser printers in Autosoft FLEX DMS version 6.5. If you use the Autosoft Finance Assistant program, you can print the buyers guides using the F&I printer.

## Creating a Buyers Guide Set

1. Click **Buyers Guide Text**.
2. In **Parameter Set**, assign the parameter set you are creating an ID number from 1 to 9.
3. Use the **Print Start Line** to indicate where you want the text to start printing. This can be from 00 to 99. When you print the buyers guide, you may need to return to this screen to adjust the value.
4. Indicate if there is a warranty with the vehicle.

Type an **X** in **As Is—No Warranty** if the vehicle is being sold without a warranty. Leave this field blank if a warranty will be included with the vehicle.

Type an **X** in **Warranty** if there is a warranty for the vehicle. Then, type an **X** in the field that corresponds to the warranty type: Full or Limited. Leave these three fields blank if no warranty is included with the vehicle.

5. In **Labor %** and **Parts %**, type the percentage of labor and parts the dealership will take responsibility for under the warranty.
6. Use the **Systems Covered** section to enter the systems covered under the warranty and the **Duration** section to enter the duration the warranty will cover each system.
7. In **Satisfaction Professional Name**, type the name of the satisfaction professional you want to print on the buyers guide.
8. Click **Save** to save the set. The set is added to the window on the right side of the screen.
9. Add additional sets as needed. Click **Exit** to close the screen when you are finished.

## Editing a Buyers Guide Set

1. Type the parameter set number, or click the set in the list on the right side of the screen.
2. Click in a field, and edit the information as needed.
3. Click **Save** to save the changes.

## Deleting a Set

1. Select the set, and click **Delete**.
2. Click **OK** when prompted to verify you want to delete the record.

## Printing the Buyers Guide Sets

You should print the buyers guide information so you can reference it when you want to print the buyers guide. Click **Print**, and select your print criteria. You should reprint the list any time you create a new buyers guide set or edit a set.

## Vehicle Options

Use these buttons to enter common options on used vehicles and new vehicles. For used vehicles, the options you enter are available in a list when you print window stickers. You can select the options you want to print on the sticker. For new vehicles, you can use the codes to add options to vehicles' files under View Options on the Desk Manager main menu.

## Entering Options

1. Click **Vehicle Options (New)** or **Vehicle Options (Used)** to open the corresponding option screen.
2. Type the code you want to assign the option. This field holds up to five alphanumeric characters.
3. In **Description**, type a description of the option.
4. In **Retail Price**, type the price for the option.
5. Click **Save** to save the information. The option is added to the window on the right side of the screen.
6. Click **Exit** to close the screen when you are finished.

## Editing Options

1. Type the option code, or click the option in the list on the right side of the screen. The information for the option fills in on the screen.
2. Click in a field, and edit the information.
3. Click **Save** to save the changes.

## Deleting Options

1. Select the option.
2. Click **Delete**.
3. Click **OK** when prompted to verify you want to delete the option.

## Printing the Options

When you are finished entering options, it may be useful to print the list so you can reference it as needed. Click **Print**, and select your print criteria. You should print a revised list any time you edit the options.

## 'Get Ready' Text

Use this button to open the "Get Ready" Text screen to create a checklist you can use to prepare vehicles for sale. You can print the checklist through the Buyers Guide option on the Desk Manager main menu.

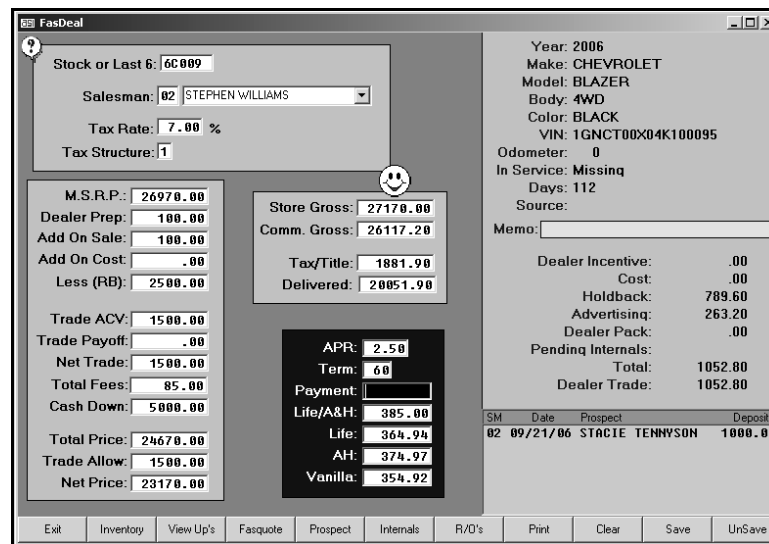
The screenshot shows a window titled "Get Ready" Text. It contains a grid of 24 numbered text input fields arranged in three columns. The items are: 1: Safety Check, 2: Oil Change, 3: Tires, 4: State Insp., 5: Emissions, 6: Tune Up, 7: Moldings, 8: Stripes, 9: Door Guards, 10: Flaps, 11: Rustproof, 12: Sound Guard, 13: Fabric Prot., 14: Ext. Gloss, 15: Body Work, 16: Brush Touch, 17: Radio, 18: (empty), 19: (empty), 20: (empty), 21: (empty), 22: (empty), 23: (empty), 24: Gas - Gallons. At the bottom of the window are three buttons: Exit, Fill Defaults, and Save.

1. Click **'Get Ready' Text**.
2. Default entries automatically fill in on the screen. You can keep these entries or edit them to meet your dealership's needs.
3. To edit the entries, type a description for each item you want to add to the list. You can enter up to 24 items. Each line holds up to 15 characters. At anytime, you can click **Fill Defaults** to load the default entries.
4. Click **Save** to save the information. The system returns you to the System Setup menu.

Once you are finished entering the setup information, you can begin using the Desk Manager module.

## Chapter 5 FasDeal

The FasDeal screen allows you to enter deal information so a salesperson can view and print it for the customer. The system fills in some of the information based on the vehicle information in the system. If the customer is looking for a specific payment, you can enter the payment, and the system will recalculate the information. You save Up's information with the deal information, but the Up's will not transfer to the Accounting module, to the Traffic module, or to the Autosoft Finance Assistant program. If you integrate with the Autosoft Finance Assistant program, you should begin and complete the deal in the F&I program rather than in the Desk Manager FasDeal.



The screenshot shows the FasDeal software interface with the following data:

- Vehicle Information:**
  - Year: 2006
  - Make: CHEVROLET
  - Model: BLAZER
  - Body: 4WD
  - Color: BLACK
  - VIN: 1GNCT00X04K100095
  - Odometer: 0
  - In Service: Missing
  - Days: 112
  - Source:
- Financial Summary:**
  - M.S.R.P.: 26970.00
  - Dealer Prep: 100.00
  - Add On Sale: 100.00
  - Add On Cost: .00
  - Less (RB): 2500.00
  - Trade ACV: 1500.00
  - Trade Payoff: .00
  - Net Trade: 1500.00
  - Total Fees: 85.00
  - Cash Down: 5000.00
  - Total Price: 24670.00
  - Trade Allow: 1500.00
  - Net Price: 23170.00
- Store/Comm:**
  - Store Gross: 27170.00
  - Comm. Gross: 26117.20
  - Tax/Title: 1881.90
  - Delivered: 20051.90
- APR/Term/Other:**
  - APR: 2.50
  - Term: 60
  - Payment:
  - Life/A&H: 385.00
  - Life: 364.94
  - AH: 374.97
  - Vanilla: 354.92
- Dealer Incentives:**
  - Dealer Incentive: .00
  - Cost: .00
  - Holdback: 789.60
  - Advertising: 263.20
  - Dealer Pack: .00
  - Pending Internals: Total: 1052.80
  - Dealer Trade: 1052.80
- Prospect Table:**

SM	Date	Prospect	Deposit
02	09/21/06	STACIE TENNYSON	1000.00

### Entering the Deal

1. Click **FasDeal**.
2. Type the stock number or last six digits of the VIN. You can also click **Inventory** to search for a vehicle. A list of car lines appears. Click the car line to view a list of the vehicles in this car line. Click the car you want to select.
3. The vehicle's information fills in on the screen. Press ENTER to advance through the fields, and type the appropriate information (add-on costs, fees, trade, APR, term, etc.). As you enter the information, the system recalculates the financial information. See the table on the following pages for complete information about each field on this screen.
4. To enter prospect information, click **Prospect**. Type the prospect's information, and click **Save** in the bottom right-hand corner of the Prospect Information entry screen. This will save the prospect information with the vehicle FasDeal, so anyone who pulls this vehicle will see that there is an Up.

5. Click **Save** on the FasDeal screen to save the deal. (If you have not entered Up information when you save the FasDeal, the Prospect Information entry screen appears. Enter the necessary information at this time.)

The following table lists each field on the FasDeal screen. The name of the field appears in the first column. The second column explains the information you need to enter in each field. The system automatically calculates the values in some of the fields. For these fields, the table explains how the system calculates the value.

<b>Field</b>	<b>Information it requires/displays</b>
<b>Stock or Last 6</b>	Type the vehicle's stock number or the last six digits of the VIN. The vehicle's information fills in on the screen.
<b>Salesman</b>	Type the salesperson's ID number, or select the salesperson from the drop-down list. The list pulls all of the salespeople entered under Salesman Information in the Desk Manager setup and Accounting setup if you integrate with the Accounting module.
<b>Tax Rate</b>	This field fills in with the tax rate percentage entered under Standard Fees/Parameters in the setup.
<b>Tax Structure</b>	This field fills in with the number for the tax rate structure set as the default under Standard Fees/Parameters in the setup.
<b>M.S.R.P.</b>	This field displays the manufacturer's suggested retail price. It pulls from the vehicle information entered in the system. If the MSRP is missing from the inventory file, the system automatically calculates it using the percentage specified under Standard Fees/Parameters in the setup.
<b>Dealer Prep</b>	This field displays the dealer prep amount. This value pulls from the vehicle information entered in the system.
<b>Add On Sale</b>	Type any additional sale amount.
<b>Add On Cost</b>	Type any additional cost amount.
<b>Less (RB)</b>	Type the rebate amount.
<b>Trade ACV</b>	If there is a trade, type the actual cash value of the trade.
<b>Trade Payoff</b>	Type the amount the customer still owes on the trade vehicle.
<b>Net Trade</b>	This field displays the net trade amount. This is the trade ACV minus the trade payoff.
<b>Total Fees</b>	This field displays the total fees for the sale. The system automatically calculates the fees based on the values entered under Standard Fees/Parameters in the setup.
<b>Cash Down</b>	Type the amount the customer is putting down on the vehicle.
<b>Total Price</b>	This field displays the total price of the vehicle. The system calculates this value by adding the MSRP, dealer prep, and add-on sale and subtracting the rebate.

Field	Information it requires/displays
<b>Trade Allow</b>	This field automatically fills in with trade ACV amount. If there is no trade, this field fills in with total for advertising and any pending repairs.
<b>Net Price</b>	This field displays the net price for the vehicle. The system calculates this by subtracting the trade allowance from the total price.
<b>Store Gross</b>	<p>This field displays the total gross profit for the sale. The system calculates this value by adding the MSRP, dealer prep, and add-on sale and subtracting the cost of the vehicle and add-on cost.</p> <p>This value must be above the desired Dealer Gross you set for the model under Model Codes/Average Grosses in the setup. If you did not set the Dealer Gross in the Setup, the system calculates the desirable gross as 5% of the MSRP. If this comes to less than \$850, the system uses \$850 instead. The face on the screen smiles when the store gross meets or exceeds the desired gross and frowns when it falls below the desired gross.</p>
<b>Comm. Gross</b>	This field displays the total commissionable gross. The system calculates this value by subtracting the holdback and dealer prep from the store gross.
<b>Tax/Title</b>	This field displays the total for tax and fees. The system calculates this value by adding the sales tax and total fees. It uses the rate in the <b>Tax Rate</b> field to calculate the sales tax on the net price.
<b>Delivered</b>	This field displays the amount the customer paid for the vehicle. The system calculates this value by adding the total net price and the total tax/fee amount.
<b>APR</b>	Type the annual percentage rate for the customer's financing.
<b>Term</b>	Type the number of months the customer is financing the vehicle.
<b>Payment</b>	If the customer desires a specific payment, type the amount in this field. The system recalculates the values on the screen to reflect the target payment. Based on the Store Gross, the face will indicate if the calculation is acceptable by smiling or unacceptable by frowning.
<b>Life/A&amp;H</b>	This field displays the customer's monthly payment with Life and A&H. The Life/AH, Life, AH, & vanilla amounts will be incorrect if the Prima Facia Rates have not been entered and generated in the setup.
<b>Life</b>	This field displays the customer's monthly payment with Life. The Life/AH, Life, AH, & vanilla amounts will be incorrect if the Prima Facia Rates have not been entered and generated in the setup.
<b>AH</b>	This field displays the customer's monthly payment with A&H. The Life/AH, Life, AH, & vanilla amounts will be incorrect if the Prima Facia Rates have not been entered and generated in the setup.
<b>Vanilla</b>	This field displays the customer's monthly payment. The Life/AH, Life, AH, & vanilla amounts will be incorrect if the Prima Facia Rates have not been entered and generated in the setup.



## Generating a FasQuote

The **FasQuote** button on the bottom of the screen allows you to calculate the monthly payment (including Life and A&H) for different financing terms from 12 to 78 months. Click **Points** to increase or decrease the APR. As you adjust the APR and gross amounts, the system recalculates the payments. Click **Gross** to increase or decrease the payment amounts by the default value. (You set this default under Standard Fees/Parameters in the setup.) Click **Apply** to add the information to the deal or **Return** to close the screen without applying the FasQuote.

## Viewing Up's

Click **View Up's** to display a list of saved deals. Click the Up you want to select.

## Viewing Internals

Click **Internals** to display a list of the internals posted to the vehicle. Click **Back** to close the View Internals screen.

## Viewing Repair Orders

Click **R/O's** to view a summary of the repair order for any pending repairs on the vehicle. The bottom of the viewing screen displays the total of the estimated repair. Click **Back** to close the repair order.

## Printing the FasDeal

Use the **Print** button to print the FasDeal. You have two printing options:

- **Print Reactor Payment:** Click this button to print payments with a specified reactor text.
  1. Indicate if you want to print Life, A&H, both Life & AH, or Vanilla.
  2. Next, indicate the reactor text you want to print. (You entered the reactor text under Customer Reactor Text in the setup.)
  3. When prompted to verify your printer is ready, select your print criteria.
  
- **Print Deal With Payments:** Click this button to print the deal with all of the payments or just Life and A&H.
  1. Indicate if you want to print Life and A&H or all payments.
  2. When prompted to verify your printer is ready, select your print criteria.

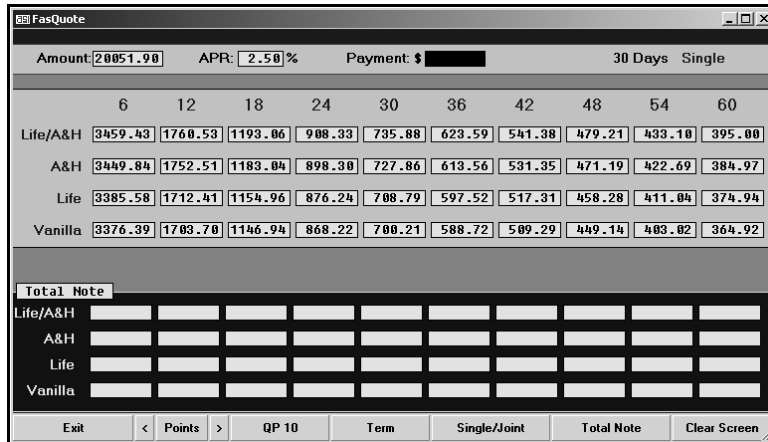
## Deleting a FasDeal

You use the **UnSave** button to delete a FasDeal. Deleting the FasDeal removes the deal from the Up list and deletes the Up's information.

## Chapter 6 FasQuote

The FasQuote allows you to quickly calculate payments. Once you specify the finance amount and annual percentage rate, the system automatically displays the customer's payment (with or without Life and A&H). You can view payments for financing from 6 to 180 months. The FasQuote feature only works if you entered and generated the Prima Facia Rates under Finance Rates in the Desk Manager Setup.

1. Click **FasQuote**.
2. In **Amount**, type the amount the customer is financing.
3. In **APR**, type the annual percentage rate, and press ENTER. The fields on the screen automatically display the payments for each term.

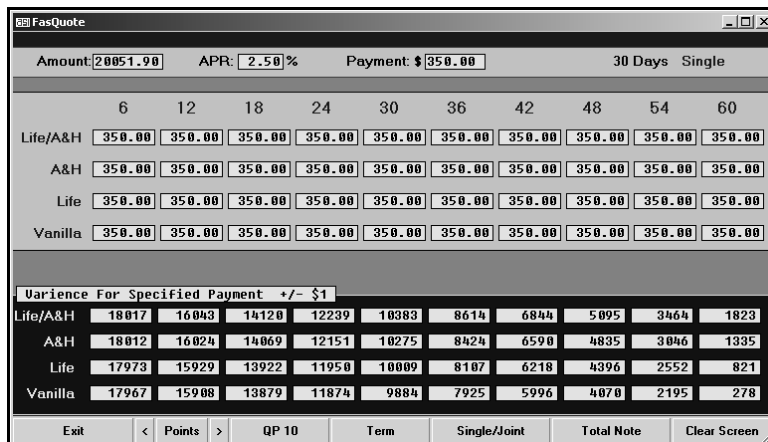


Amount: 20051.90		APR: 2.50%		Payment \$		30 Days		Single		
	6	12	18	24	30	36	42	48	54	60
Life/A&H	3459.43	1760.53	1193.06	908.33	735.88	623.59	541.38	479.21	433.10	395.00
A&H	3449.84	1752.51	1183.04	898.30	727.86	613.56	531.35	471.19	422.69	384.97
Life	3385.58	1712.41	1154.96	876.24	708.79	597.52	517.31	458.28	411.04	374.94
Vanilla	3376.39	1703.70	1146.94	868.22	700.21	588.72	509.29	449.14	403.02	364.92

Total Note	6	12	18	24	30	36	42	48	54	60
Life/A&H										
A&H										
Life										
Vanilla										

4. If the customer wants a specific monthly payment, type the amount in the **Payment** field. The system automatically recalculates the payments and displays the total note at the bottom of the screen.



Amount: 20051.90		APR: 2.50%		Payment \$ 350.00		30 Days		Single		
	6	12	18	24	30	36	42	48	54	60
Life/A&H	350.00	350.00	350.00	350.00	350.00	350.00	350.00	350.00	350.00	350.00
A&H	350.00	350.00	350.00	350.00	350.00	350.00	350.00	350.00	350.00	350.00
Life	350.00	350.00	350.00	350.00	350.00	350.00	350.00	350.00	350.00	350.00
Vanilla	350.00	350.00	350.00	350.00	350.00	350.00	350.00	350.00	350.00	350.00

Variance For Specified Payment +/- \$1										
	6	12	18	24	30	36	42	48	54	60
Life/A&H	18017	16043	14120	12239	10383	8614	6844	5095	3464	1823
A&H	18012	16024	14069	12151	10275	8424	6590	4835	3046	1335
Life	17973	15929	13922	11950	10009	8107	6218	4396	2552	821
Vanilla	17967	15908	13879	11874	9884	7925	5996	4070	2195	278

The buttons on the bottom of the screen allow you to “work” the FasQuote.

**Points:** Click this button to increase or decrease the annual percentage rate by .05 percent. Click < to decrease the rate. Click > to increase the rate.

**QP #:** Click this button to decrease the payment by the number indicated on the button. This value was set under Standard Fees/Parameters in the Desk Manager setup. If you click the button again, the payment will increase by the number indicated on the button. For example, if the button reads, “10,” and the payment is \$500, clicking on the button will change the payment to \$490. Clicking the button again returns the payment to \$500.

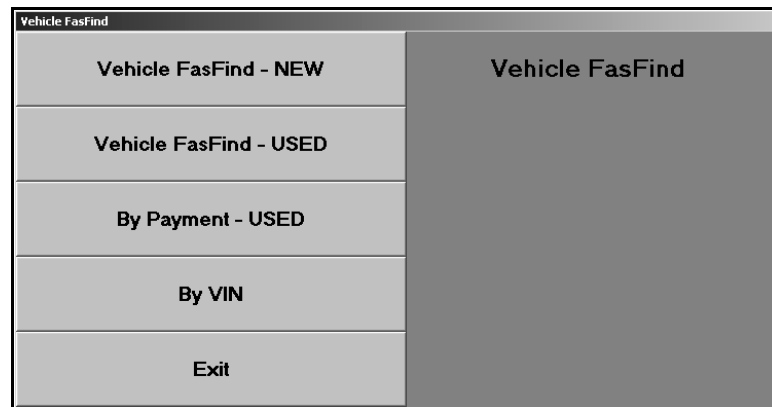
**Term:** Click this button to scroll through the financing terms. The screen displays the terms in groups from 6-60, 66-120, and 126-180.

**Single/Joint:** Click this button to display the payment for joint life. The screen displays if the figures are for 30 days single or joint life. By default, the screen shows the payments for single life.

**Total Note:** Click this button to view the total payments including interest. The bottom part of the screen displays this information.

## Chapter 7 Vehicle FasFind

The Vehicle FasFind allows you to quickly locate a vehicle in stock. You can also locate new vehicles based on the model, used vehicles based on the price or target monthly payment, and both new and used vehicle based on the VIN.



### Vehicle FasFind—New

This vehicle FasFind allows you to find new vehicles in stock based on model code. You can also specify a specific color code and price range to narrow the search even further. In order for the FasFind feature to work, you must have defined your model codes under Model Codes/Grosses in the Desk Manager setup, and there must be model codes and color codes entered on the Vehicle Information screen. (See chapter 14 for information about the Vehicle Information screen.)

1. Click **Vehicle FasFind—New**.
2. If the customer wants a specific model, type the model code.
3. If the customer wants a specific color, type the color code.
4. If there is a specific price range you want to use for the search, type the minimum and maximum prices.
5. The screen displays a list of vehicles that meet the criteria.
6. Click a vehicle to view the internals. Click **Back** to close the View Internals screen.
7. Click **Print** to print the list of vehicles.

## Vehicle FasFind—Used

This vehicle FasFind allows you to find used vehicles in stock based a specific price range.

1. Click **Vehicle FasFind—Used**.
2. Type the minimum and maximum prices.
3. The screen displays a list of the vehicles in the price range.
4. Click a vehicle to view the internals. Click **Back** to close the View Internals screen.
5. Click **Print** to print the list of vehicles.

## By Payment—Used

This vehicle FasFind allows you to find used vehicles based on the customer's desired payment. The results are based on the vehicle's actual cash value. The system searches for vehicles with an actual cash value up to and 10% below the potential financed amount as determined by the payment, APR, and term specified.

1. Click **By Payment—Used**.
2. Type the desired payment, annual percentage rate, and term of the financing.
3. The screen displays a list of the vehicles that meet the criteria.
4. Click a vehicle to view the internals. Click **Back** to close the View Internals screen.
5. Click **Print** to print the list of vehicles.

## By VIN

This vehicle FasFind allows you to find a vehicle based on its VIN number. The information displayed on this screen is the same information available on the View Vehicle Detail screen in the Accounting module. Once the screen displays the selected vehicle, you can use the buttons on the bottom of the screen to retrieve Chrysler VIP or GM VIS for the vehicle. (The Ford OASIS option does not work at this time.) This pulls the service history the manufacturer has on record for the vehicle. In order to retrieve VIP, you must complete the DealerCONNECT security setup in the Parts Utilities. In order to retrieve VIS, you must enter your DealerWorld user name and password in the GM Warranty Parameters in the Service Writing System Setup.

1. Click **By VIN**.
2. Type the last eight characters of the vehicle's VIN.
3. The screen displays a list of vehicles that meet the criteria.
4. Click a vehicle to view a list of repair orders for the vehicle in the window at the bottom of the screen. Click a repair order to view an on-screen summary of the repair order. Click **Back** to close the Finished R/O screen.

## Chapter 8 Salesman Up's

The Salesman Up's menu allows you to view, print, and delete Up information. You can print worksheets the salespeople can use to conduct follow-up, and you can print a report that lists all of the vehicles in your inventory that were matched with prospects. This report also lists all of the potential trade-in vehicles recorded for the Up's. Do not confuse Up's with prospects from the Traffic module. You cannot transfer Up's to the Traffic module.



### View Up's

Use this button to view Up's for all salespeople or a specific salesperson.

1. Click **View Up's**. A list screen appears and displays a list of salespeople.
2. Type the salesperson's number, or click the salesperson in the list. Click the "00 (All Salesman)" line to view the Up's for all salespeople.
3. The screen displays the Up's.
4. Click **Salesman List** to return to the complete list of salespeople.

### Print Up's Worksheet For Salesman

Use this button to print Up worksheets. The worksheet displays the salesperson's name and number, the last contact date, the prospect's name, vehicle looking to be purchased, the cash price, net trade, cash down, net price, tax/title, delivered amount, APR, term, payments, and debt ratio.

1. Click **Print Up's Worksheet For Salesman**.

2. Type the salesperson's number, or select the salesperson from the drop-down list. If you want to print worksheets for all of the salespeople, type 00 in the field.
3. When prompted, select your print criteria.

## Print List Of All Up's

Use this button to print a list of all the Up's in the system. The list displays the salesperson's number, date the prospect was entered, prospect's name, and the vehicle's stock number, model year, make, and model.

## Print Potential Trades & Instock Hits

Use this button to print lists of the potential trade vehicles and the vehicles in stock salespeople matched with prospects. This information is only available if you entered it for the Up on the Prospect Information screen.

The trade list displays the salesperson's number, date the prospect was entered, prospect's name and phone number, stock number, make, and model of the vehicle looked at, and the year, make, description, and ACV of the potential trade vehicle. It also lists any comments entered for each trade.

The in-stock hits list displays the vehicle's stock number, salesperson's number, date the prospect was entered, prospect's name, and the deposit amount.

## Purge Up's For Salesman

Use this button to delete Up's for one salesperson or all salespeople. You specify the date you want to use as the ending date for the purge. The system deletes all Up's previous to this date. The purge removes any deal and prospect information entered on the FasDeal screen.

1. Click **Purge Up's For Salesman**.
2. Type the salesperson's number, or select the salesperson from the drop-down list. If you want to delete Up's for all of the salespeople, type 00 in the field.
3. Type the ending date you want to use to delete the information. You must enter the date in an eight-character format with or without slashes (mm/dd/yyyy or mmdyyy).
4. Click **OK** when prompted to verify you want to purge the information.

## Purge All Sold FasDeal Up's

Use this button to delete all the Up's that have been sold.

1. Click **Purge All Sold FasDeal Up's**.
2. Click **OK** when prompted to verify you want to purge the information.

## Purge All FasDeal Up's

Use this button to delete all of the FasDeal Up's. This deletes all the Up's in the system, regardless of the salesperson or date.

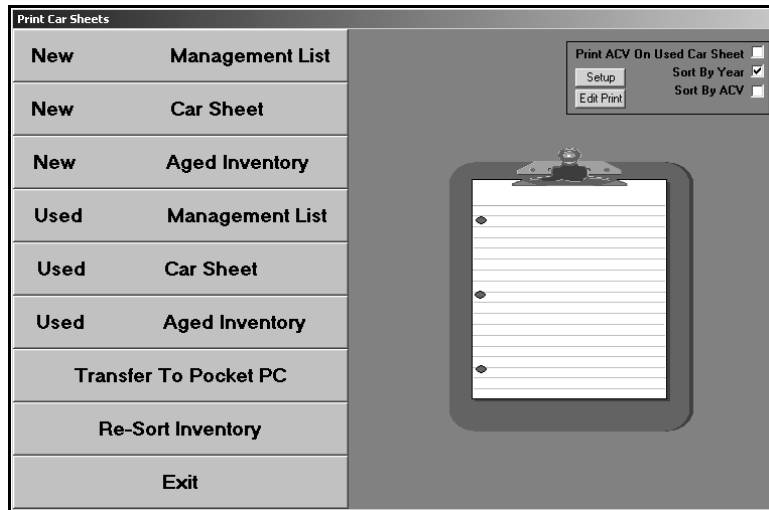
1. Click **Purge All FasDeal Up's**.
2. Click **OK** when prompted to verify you want to purge the information.





## Chapter 9 Car Sheets

You use the Print Car Sheets menu to print four types of reports for new and used vehicles. The system pulls the information from the Accounting module. Therefore, you must re-sort the inventory before printing the car sheets to ensure the information is current.



**Tip:** Some dealers use the Autosoft Report Generator to create a customized Inventory report.

### Setting Your Printing Options

The top-right corner of the menu provides printing options. These options allow you to determine how the reports print. You can select to have the ACV print on the used vehicle reports, and you can select to sort the information on the reports by year or ACV. To select an option, click the option box. A checkmark appears in the box to indicate you selected the option. Click the option box again to clear the checkmark.



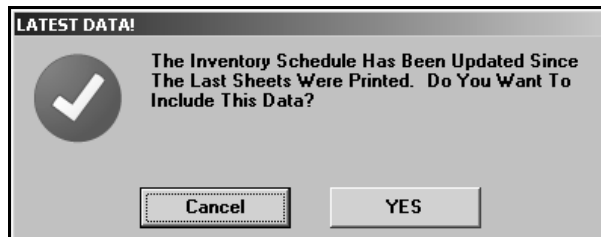
The **Setup** button opens the Print Setup screen. This screen allows you to specify additional options you want to use when printing the car sheets. Click the options you want to select. When you are finished, click **Return** to return to the Print Car Sheets menu.

The **Edit Print** button opens the Vehicle List screen so you can edit the print status for vehicles. Click **New** or **Used** to view vehicles. Click a vehicle in the list to change its print status from Y (for yes) to N (for no) or from N to Y. The reports will only include information for vehicles with a status of Y. If you want to include all vehicles on the reports, click **Set ALL To YES**, and click **OK**.

Vehicle List					
41013	(V)	365DA00EX4S500758	2004	BUICK	RENDEZ
41016	(V)	1G4HP00K944100235	2004	BUICK	LESABRE
41018	(V)	1G4HP00K044100267	2004	BUICK	LESABRE
41022	(V)	365DA00E84S500308	2004	BUICK	RENDEZVOUS
41024	(V)	5GADT00S542100276	2004	BUICK	RAINIER
41030	(V)	1G4HP00K944100321	2004	BUICK	LESABRE
41031	* N	1G4HP00K044100561	2004	BUICK	LESABRE
41033	(V)	2G4WS00J041100905	2004	BUICK	CENTURY
41034	(V)	2G4WS00J541100421	2004	BUICK	CENTURY
41037	(V)	5GADT00S842100154	2004	BUICK	RAINIER
41040	(V)	2G4WB00KX41100121	2004	BUICK	REGAL
41044	(V)	1G4HP00K044100940	2004	BUICK	LESABRE
41050	(V)	1G4HP00K644100028	2004	BUICK	LESABRE
41051	(V)	1G4HP00K344100486	2004	BUICK	LESABRE
41054	(V)	1G4HR00K640100886	2004	BUICK	LESABRE
41056	(V)	1G4HP00K444100999	2004	BUICK	LESABRE
41057	(V)	1G4HR00KX44100022	2004	BUICK	LESABRE
41058	(V)	1G4HR00KX40100351	2004	BUICK	LESABRE
41061	(V)	1G4HP00K544100376	2004	BUICK	LESABRE
41062	(V)	1G4HP00K044100765	2004	BUICK	LESABRE
41063	(V)	365DA00E94S500861	2004	BUICK	RENDEZVOUS
41066	(V)	1G4HP00K040100283	2004	CHEVROLET	LESABRE
41070	(V)	2G4WS00J541200122	2004	BUICK	CENTURY
41072	(V)	1G4HR00K140100791	2004	BUICK	LESABRE
41073	(V)	2G4WS00J641200795	2004	BUICK	CENTURY
41075	(V)	1G4HP00K144100259	2004	BUICK	LESABRE
41076	(V)	2G4WS00J741200813	2004	BUICK	CENTURY
41078	(V)	2G4WS00J641200318	2004	BUICK	CENTURY
41079	(V)	2G4WS00J641200559	2004	BUICK	CENTURY
41081	(V)	2G4WS00J241200642	2004	BUICK	CENTURY
41084	(V)	5GADT00S742200506	2004	BUICK	RAINIER
41085	(V)	1G4HP00K344100659	2004	BUICK	LESABRE

Buttons: Exit, "Click" Line To Change Print Status, Set ALL To YES, New, Used

If the inventory schedule has changed since the last time you printed the car sheets, the system prompts you to re-sort the inventory when you open the Car Sheets menu. Click **YES** to re-sort the inventory. As the system sorts the inventory, it displays the stock numbers for the vehicles along with a status bar indicating the status of the sort. You can re-sort the inventory at any time by clicking **Re-Sort Inventory**.



## Printing the Car Sheets

1. If necessary, re-sort the inventory.
2. Once the sort is complete, click the button that corresponds to the report you want to print.
3. For aged inventory sheets, specify the minimum number of days. The sheets will include any vehicles aged over this value.
4. A list of car lines appears. Click the line you want to print.
5. When prompted to verify your printer is ready, select your print criteria.

## New Management List

Use this button to print a management list for new vehicles. Each vehicle on the list is numbered. The list displays the stock number, date the vehicle arrived in inventory, number of days in inventory, model year, model, last six digits of the VIN, body style, color, options, invoice amount, holdback, total internals, total amount of the vehicle, MSRP, factory rebate, dealer incentive, memo text entered for the vehicle, and the number of hits the vehicle received.

The next part of the list provides a summary for each model on the list. It displays the model name, body style, number of units in stock, total value of the model group, average price per car, average days in inventory, and the percentage of the car line inventory this model makes up.

The bottom of the list displays totals for the car line. It displays the total number of vehicles in the car line, total amount of the original inventory, total internals, total inventory value, and total inventory value at retail.

## New Car Sheet

Use this button to print car sheets for new vehicles. The car sheet is a condensed report about all of the vehicles in the selected car line. It displays the stock number, year, make, model, body style, memo information, color, price, mileage, location, spiff, rebate, and number of days in inventory.

The bottom of the report provides a summary of the vehicle information. It lists the total number of vehicles in the car line and breaks the vehicles down into aging groups. The report also displays an inventory grouping according to values.

## New Aged Inventory

Use this button to print an aged inventory list for new vehicles. The report lists the stock number, year, make, model, body style, color, miles, memo information, ACV, and number of days in inventory.

The bottom of the list displays totals for the car line. It displays the total number of vehicles in the car line, total amount of the original inventory, total internals, total inventory value, and total inventory value at retail.

## Used Management List

Use this button to print a management list for used vehicles. Each vehicle on the list is numbered. The list displays the stock number, date the vehicle arrived in inventory, number of days in inventory, model year, model, last six digits of the VIN, body style, color, options, invoice amount, holdback, total internals, total amount of the vehicle, MSRP, factory rebate, dealer incentive, memo text entered for the vehicle, and the number of hits the vehicle received.

The next part of the list provides a summary for each model on the list. It displays the model name, body style, number of units in stock, total value of the model group, average price per car, average days in inventory, and the percentage of the car line inventory this model makes up.

The bottom of the list displays totals for the car line. It displays the total number of vehicles in the car line, total amount of the original inventory, total internals, total inventory value, and total inventory value at retail.

## Used Car Sheet

Use this button to print car sheets for used vehicles. The car sheet is a condensed report about all of the vehicles in the selected car line. It displays the stock number, year, make, model, body style, memo information, color, price, mileage, spiff, rebate, and number of days in inventory. The "location" is the ACV backward and rounded.

The bottom of the report provides a summary of the vehicle information. It lists the total number of vehicles in the car line and breaks the vehicles down into aging groups. The report also displays an inventory grouping according to values.

## Used Aged Inventory

Use this button to print an aged inventory list for used vehicles. The report lists the stock number, year, make, model, body style, color, miles, memo information, ACV, and number of days in inventory.

The bottom of the list displays totals for the car line. It displays the total number of vehicles in the car line, total amount of the original inventory, total internals, total inventory value, and total inventory value at retail.

## Chapter 10 Sales

The Vehicle Sales menu allows you to view and print sales information. You can view sales by sales type (new, used, etc.), salesperson, or stock number. In addition, you can view an on-screen summary of your sales for the current month and year to date. The sales reports allow you to print monthly sales statistics and commission reports. You can also print a report that lists the options on the new vehicles you sold.



### View Vehicle Sales

Use this button to view sales for a specific month. You can view the sales for any month within the last 12 months, and you can select to view new sales, used sales, wholesale sales, dealer trades, or all sales.

1. Click **View Vehicle Sales**.
2. Click the month button on the top of the screen that corresponds to the month you want to view.
3. Use the buttons on the top of the screen to select the type of sales you want to view.
4. Click **Print** to print the sales information.
5. When prompted to verify your printer is ready, select your print criteria.

**Tip:** Use the **Extended Search** button to search for a specific sale in history. Type the stock number, customer's last name/part of the customer's last name, or last six digits 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 this button to print a summary of the totals posted to each general ledger sale account for the month and year to date. For each account, the report displays the month-to-date and year-to-date cost, gross, units, and average gross. The bottom of the report displays the month-to-date and year-to-date sales information for new retail, used retail, wholesale, warranty sales, and credit life sales.

1. Click **Print Vehicle Sales Summary**.
2. When prompted to verify your printer is ready, select your print criteria.

## Vehicle Sales FaStats

Use this button to open the Vehicle Sales FaStats screen to view the monthly and year-to-date units sold, sales totals, and average gross for new, used, and wholesale sales.

1. Click **Vehicle Sales FaStats**.
2. The information is displayed on the screen.
3. Click **Close** to close the screen.

## Vehicles By Salesman

Use this button to view sales for a specific salesperson for a specific month. You can view the sales for any month within the last 12 months. In addition, you can view the total retail for any month.

1. Click **Vehicles By Salesman**.
2. Click the month button on the top of the screen that corresponds to the month you want to view.
3. The left side of the screen displays a list of salespeople. Click the salesperson whose sales you want to view.
4. The right side of the screen displays the sales. It displays the total number of vehicles, the total number of vehicles with back-end income, and the average gross per vehicle.
5. Click the **Total Month Retail** button to view the retail sales for all of the salespeople and the total retail for the current month.
6. Click **Print**, and select your print criteria.

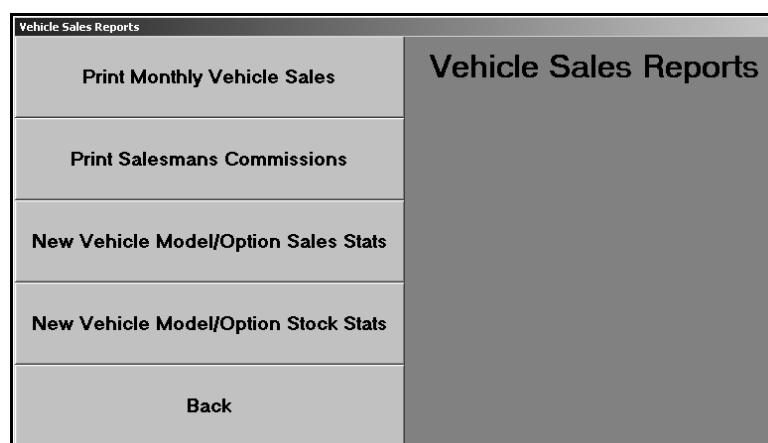
## Vehicles By Stock Number

Use this button to view sales information for a specific stock number. The screen displays all of the information posted for the sale.

1. Click **Vehicles By Stock Number**.
2. Type the stock number, or click **List** to search for a stock number. Select to view a list of stock numbers sold this month, last month, or all stock numbers that have been sold. Click the vehicle you want to view.
3. The screen displays the sales information.
4. Click **Print** to print the sales information, and select your print criteria.

## Sales Reports

This button advances you to the Vehicle Sales Reports menu. You use this menu to print monthly vehicle sales reports, commission reports, and new vehicle option sales and stock statistics.



### Print Monthly Vehicle Sales

Use this button to print a vehicle sales report for a specific salesperson for a specific date range. The report displays the sales information for new vehicles, used vehicles, and finance and insurance. The **Return** column displays the "Annualized Return On Investment." It's the percentage or return if the investment were held for 1 year (365 days).

1. Click **Print Monthly Vehicle Sales**.
2. Type the salesperson's number, or select the salesperson from the drop-down list.
3. Next, type the date range you want to use for the report. You must enter the date in an eight-character format with or without slashes (mm/dd/yyyy or mmdyyy). If you do not use slashes, press ENTER after you enter the date.
4. When prompted to verify your printer is ready, select your print criteria.



## Print Salesman's Commissions

Use this button to print a commission report for a specific salesperson for a specific date range. The detailed report lists the salesperson's number, sale date, stock number, customer's name, vehicle's year, make, and model, sale, cost, store gross, and commission gross. The short report lists the salesperson's number, sale date, stock number, customer's name, vehicle's year, make, and model, accrued commission, and split commission.

1. Click **Print Salesman's Commission**.
2. Type the salesperson's number, or select the salesperson from the drop-down list.
3. Type **D** to print a detailed report or **S** to print a short report.
4. Type the date range you want to use for the report. You must enter the date in an eight-character format with or without slashes (mm/dd/yyyy or mmddyyyy). If you do not use slashes, press ENTER after you enter the date.
5. When prompted to verify your printer is ready, select your print criteria.

## New Vehicle Model/Option Sales Stats

Use this button to print a report that lists the options for each new vehicle sold. The report provides an overview of the last 12 months of sales. The report groups each model in the car line. It lists the vehicle's year, body style, color codes, color, options, and number of days in stock. This report can be helpful in identifying the most popular vehicles, colors, and options.

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

## New Vehicle Model/Option Stock Stats

Use this button to print a report that lists the options for each new vehicle in a car line. The report groups each model in the car line and lists the vehicles in this model according to the number of days the vehicle has been in inventory. The report also lists the vehicle's year, body style, color codes, color, and options.

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

## Chapter 11 Commissions

Use the Salesman Commission screen to view, edit, and print commission. The descriptions for the lines pull from the Commission Parameters you entered in the Desk Manager setup. The information that pulls to this screen originates in the Autosoft Finance Assistant program. Once F&I completes the deal and sends the information to the Accounting module, the Accounting Department posts the deal to the journals. Once Accounting posts the deal, the Commission sheet is available for viewing and printing in Desk Manager.

If you do not use the Autosoft Finance Assistant program, the commission information originates in the Accounting module. Please note that the commission sheet is available as soon as the Accounting Department posts the deal to the Vehicle Sales journal and is available for viewing until Accounting posts the journals to the books for the month. Once Accounting posts to the books, you cannot view the commission information from this screen.

Once you pull the commission information to this screen, you can edit it as needed. The commission information you enter on this screen does not affect the vehicle sales information. It only affects the commission on the sale.

When entering commission amounts, only enter the commission amount per item. For example, the salesperson may have sold the customer a bed liner with a truck. In the appropriate field, type the commission the salesperson earned for selling the bed liner.

Salesman Commission	
Stock No: 6C009	2006 CHEVROLET BLAZER
Salesman: 02	STEPHEN WILLIAMS SMITH 09/21/06
<b>Cost</b>	
Invoice	23695.73
Schedule (120)	.00
Dealer Pack	.00
Warranty Pack	.00
Radio/Tape	.00
Flaps/Bed Liner	.00
Moldings/Guards	.00
Stripes	.00
Other	.00
Total Sales Cost	23695.73
Rustproof	.00
Ext. Gloss	.00
Int. Fabric	.00
Warr. Upgrade	.00
Other	.00
Total Dealer Cost	23695.73
Total Money Drawn	24482.10
Total Dealer Prof	786.37
Money Difference	22982.10
Trade Wholesale	1500.00
Total Down	24482.10
Less Cost Of Sale	23695.73
Commissionable Gross	786.37
Vehicle Comm.	.00%
Flat Commissions	
Rustproof	.00
Ext. Gloss	.00
Int. Fabric	.00
Warr. Upgrade	.00
Finance	.00
Credit Life	.00
Credit A_H	.00
Other	.00
Total Flat Commission	.00
Less Bird Dog Fee	.00
Bird Dog To:	
Total Commission	.00

Exit List View Internals Print Delete Clear Screen Save

## Viewing and Editing Commission

1. Click **Commissions**.
2. Type the stock number for the vehicle in the completed deal. You can search for a vehicle by clicking **List**. The list displays the deals posted in Accounting. These are the deals Accounting posted but did not update to the books for the month. Once Accounting updates the books, the system removes the deal from the list on this screen. Click the deal you want to select.
3. The deal information fills in on the screen. Enter or edit commission information as needed.
4. When you are finished, click **Save**.

## Viewing Internals for the Vehicle

Click **View Internals** to view any internals posted to the vehicle. For each internal, the screen lists the document number, posting date, journal number, description, and debit and credit amounts. Click **Back** to close the list and to return to the Commissions screen.

## Printing Commission

Once Accounting posts the deal to the books for the month, you cannot pull the deal to view the commission. Therefore, you may want to print the commission information so you have a hard copy of the information. When printing the commission, you have the option of selecting how much information prints.

1. Click **Print**.
2. When prompted to verify your printer is ready, click the button that corresponds to what you want to print. You have three options.
  - **Cancel:** This closes the prompt without printing anything.
  - **Dealer Copy:** This prints all of the information displayed on the screen.
  - **Salesman Copy:** This prints the information from the **Money Difference** field to the **Total Commission** field.

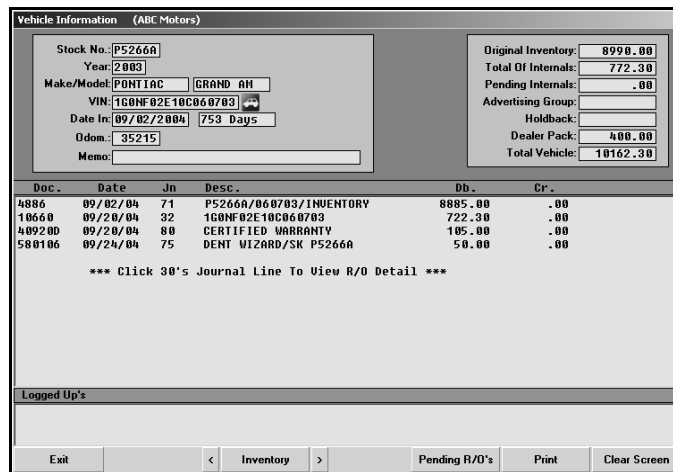
## Deleting Commission

Deleting the commission removes the commission information you added using this screen from the commission sheet. The sale remains in the active list so you can add commission to the sale later. However, if Accounting posts the sale to the books, you cannot recall the sale. Posting the sale to the books removes it from the active sale list.

1. Select the deal.
2. Click **Delete**.
3. Click **OK** when prompted to verify you want to delete the commission.

## Chapter 12 View Internals

The **View Internals** button opens the Vehicle Information screen. This screen allows you to view the internals posted to a specific vehicle in your stock. The information displayed on this screen is for viewing. You cannot edit the information.



Doc.	Date	Jn	Desc.	Db.	Cr.
4886	09/02/04	71	P5266A/060703/INVENTORY	8885.00	.00
10660	09/20/04	32	1G0NF02E10C060703	722.30	.00
409200	09/20/04	80	CERTIFIED WARRANTY	105.00	.00
580106	09/24/04	75	DENT WIZARD/SK P5266A	50.00	.00

\*\*\* Click 30's Journal Line To View R/O Detail \*\*\*

### Viewing the Internals

1. Click **View Internals**. The Vehicle Information screen appears.
2. Type the stock number. You can also click **Inventory** to search for a vehicle. Use the drop-down list in the top-left corner to select a car line. The screen displays a list of vehicles in the car line. Click the vehicle you want to select. Use the buttons on each side of the **Inventory** button to scroll through the inventory list. Click **<** to view the previous record and **>** to view the next record.
3. The information for the vehicle fills in on the screen.
4. If the vehicle is in an active deal or has been sold, a message appears next to the **Stock No.** field to inform you of the situation.
5. The middle part of the screen lists all of the internals posted to the vehicle. For each line, the list displays the document number, posting date, the journal number for the posting, a description of the posting, and the credit and debit amounts posted.
6. Click one of the 30's journal lines to view the repair order for that posting. Detail is only available for postings with a valid repair order number.
7. If the salespeople entered Up's for the vehicle, the Up's are listed in the Logged Up's section. The list will display the salesperson's number, the posting date for the Up, and the customer's name.

## Viewing Pending Repair Order

The **Pending R/O's** button allows you to view any open repair orders for the vehicle. In addition to displaying the repair order information, the screen displays the estimated total of the repair. Click **Back** to close the repair order. (You can also view the pending repair orders on the View Inventory screen.)

The information the system displays for the pending repairs depends on the Service Department properly creating the repair order for the vehicle in your stock. When the Service Department creates a repair order for a vehicle in stock (internal), the Service Writer indicates the estimated total for the pending repair. The system displays this amount as the "pending" total.

When the repair order for the internal is closed, Service updates it to Accounting. When the Accounting Department finally posts all the repair orders for the internal to the vehicle's record, the system checks the pending total against the actual repair total. If the totals are within \$10, the system clears the pending total to zero. If the totals are not within \$10, the system keeps the difference of the repairs as the pending total. (This is why it is possible to have a pending total even if there is no repair order open for the vehicle.)

As the Service Department opens repair orders for the vehicle, the pending total will increase (based on the estimated repair amount entered when the Service Writer creates the repair order) or decrease. (Remember, the pending total will only reduce to zero if the finished total and estimated repair total are within \$10; otherwise, the pending amount reflects the difference between the repair total and pending total.) When the Accounting Department posts the repair orders, the repair total for the vehicle is added to the internal amount. This is the total value of all internal repairs for the vehicle.

If you need to delete an incorrect amount or remaining amount in the **Pending Internals** field, you can delete the amount in the Accounting module or Desk Manager module. Make sure you verify the deletion with the Service Manager and someone in Accounting before deleting the amount.

## Printing the Internals

If the vehicle is involved in an active deal, you may want to print the list of internals so you have a copy of the information.

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

## Chapter 13 View Inventory

Use the View Inventory screen to view all of the inventory or inventory by car line. You can view the internals and any pending repair orders for any vehicle in inventory.

Stock	Vr	Make	Model	VIN	Color	Age	Original	Internal	Total	Pending
2002	02	GMC	1500		WHITE	699	1198.00	.00	1198.00	.00
4708	00	CHEVRO	TAHOE	199703	BLACK	856	18400.00	752.83	19152.83	.00
4792	00	CHEVRO	S-10	133294	BLACK	815	9052.59	.00	9052.59	28.40
4837	00	CHEVRO	TAHOE	205587	BLACK	787	16330.00	1143.43	17473.43	2.00
4865	02	PONTIA	MONTRA	250083	BLUE	761	10045.00	1098.38	11143.38	.00
4872	02	CHEVRO	VENTURE	104792	BEIGE	760	10375.00	409.80	10784.80	.00
4873	00	CHEVRO	VENTURE	172344	BEIGE	758	7400.00	617.97	8017.97	.00
4877	00	ISUZU	RODEO	341850	WHITE	756	6900.00	526.53	7426.53	.00
4880	99	FORD	EXDORER	065700	BLUE	755	7900.00	191.25	8091.25	.00
4881	97	CHEVRO	S-10	100416	RED	755	5900.00	192.88	6092.88	.00
4883	03	CHEVRO	SILVERAD	257561	RED	755	13900.00	1395.11	15295.11	.01
4885	02	GMC	ENVOY	148341	PEWTER	753	19225.00	518.70	19743.70	.00
4887	01	JEEP	CHEROKEE	549336	SILVER	753	10395.00	997.25	11392.25	.00
4891	96	CHEVRO	ASTRO VA	183736	GREEN	751	2900.00	168.88	3068.88	100.01
4899	01	FORD	E ESCAPE	F00316	SILVER	749	6400.00	426.70	6826.70	.00
4900	02	CHEVRO	TRAILBLA	460996	RED	747	15145.00	854.11	15999.11	.00
4904	02	CHEVRO	VENTURE	251157	BLUE	747	13350.00	577.42	13927.42	300.00
4910	96	CHEVRO	BLAZER	161598	BLACK	745	4900.00	305.39	5205.39	1001.00
4913	04	CHEVRO	SILVERAD	114192	SILVER	740	21005.00	700.83	21705.83	.00
4915	02	GMC	SIERRA	261812	GREEN	735	17645.00	1528.74	19173.74	9850.00
4923	00	CHEVRO	SILVERAD	147312	BLACK	733	9400.00	125.88	9525.88	.00
4926	04	CHEV	C1500	341968	SILVER	727	14400.00	240.79	14640.79	.00
4928	02	CHEVRO	AVALANCH	158212	WHITE	727	17900.00	923.45	18823.45	64.56
4931	03	TOYOTA	FORERUNN	006125	SILVER	727	23900.00	125.88	24025.88	.00
4934	02	OLDSMO	SILHOUET	102844	BLUE	726	12400.00	674.27	13074.27	.00
4936	98	CHEVRO	EXT CAB	177103	WHITE	726	7400.00	125.88	7525.88	.00
4938	01	CHEVRO	TAHOE	170243	GREEN	726	16400.00	190.85	16590.85	.00
4939	04	CHEV	SILVERAD	254816	BLACK	748	21005.00	291.66	21296.66	.00

Line 9A Used USED TRUCK  27 CHEVRO 9 GMC 3 FORD 1 TOYOTA 1 PONTIA  
  1 OLDSMO 1 NISSAN 1 MITSUB 1 MERCUR 1 JEEP

2. Click **View Inventory**.
3. Select the car line you want to view from the drop-down list.
4. The screen displays a list of all the vehicles in the car line, along with additional information.

The system calculates the **Original** column by adding the dealer pack and the original cost of the vehicle. (If the Original column only displays the dealer pack, then the original amount was never entered for that vehicle.)

The **Internal** column displays the total cost of all repairs performed on the vehicle.

The system calculates the **Total** column by adding the Original column and the Internal column.

The **Pending** column displays the estimated total for any open repair orders for the vehicle. Remember, as the Service Department opens and closes repair orders for the vehicle, the pending total will increase or decrease. When the Accounting Department posts the repair orders, the system adds the repair total for the vehicle to the internal amount.

5. Click **Remove Sold** to remove any sold vehicles in the list so you can view only the current inventory.
6. Additional filtering buttons appear in the bottom right-hand corner of the screen. There is a button for each model in the car line, and the button indicates the number of each model in stock. Click a button to view just the specified model.

- To view internals for a vehicle, click the vehicle in the list.

**View Internals**

Year: 1998  
Make: FORD  
Model: TAURUS  
VIN: 1FAP00S4WA200020  
Date In: 04/02/2004 Days: 167  
Desc.:  
Original Inventory: 5600.00  
Internals: 37.01  
Total Inventory: 5637.01

Doc.	Date	Jn	Desc.	Db.	Cr.
33435	04/08/04	20	FISHER/Trade Inven.	5200.00	.00
03873	04/15/04	30	1FAP00S4WA200020	27.71	.00
03874	04/15/04	30	1FAP00S4WA200020	9.30	.00
104418	04/15/04	80	DETAILING	100.00	.00

Close      Repair Orders

- You can view any open repair orders from the internals list by clicking the **Repair Orders** button on the bottom of the View Internals screen. (Click **Back** on the R/O's screen to close the repair order.)
- Click **Close** to close the View Internals screen.
- Select another car line as needed.
- Use the **Print** button to print the selected list of vehicles as needed.
- Click **Exit** to close the screen when you are finished viewing vehicles.

## Chapter 14 Inventory Management

The Inventory Management menu allows you to complete several tasks that help manage your inventory. The options allows you to view invoices and to set incentives globally or by vehicle. You can also use the menu to print inventory analysis reports and to download inventory information.

Inventory Management	
Enter Vehicles	Inventory Management
Active Vehicle Invoices	
Incentives & Packs (Global)	
Incentives (By Car)	
Inventory - Sales - Floorplan Analysis	
Inventory Marketing Downloads	
Print R/O Detail	
Inventory Analysis	
Exit	

**Important:** Do not enter inventory in Desk Manager. Only enter inventory in the Accounting module.

### Enter Vehicles

You use this option to view and edit non-accounting vehicle information. Type the stock number, or click **Inventory List** to search for the vehicle. If you edit information, click **Save** to save the changes. Use the table on the following page to help you identify the information displayed in each field.

Vehicle Information (ABC Motors)																																		
Stock Number: 6C009	VIN: 1GNC100X04K100095	Model Code:																																
Line: 1	Year: 2006	Model: BLAZER																																
Suffix: 0	New/Used (N/U): N Certified (Y/N)? N	Body: 4WD																																
Deal Status:	Make: CHEVROLET	Miles:																																
Date In: 06/01/2006	Memo:																																	
In Service: 09/21/2006	Source Code:																																	
Color: BLACK	From:	Title: 154558778 <input checked="" type="checkbox"/> Title Rec'd																																
Color Codes:	WEB Download (Y/N): <input checked="" type="checkbox"/>																																	
Key Codes: S222B S222B																																		
Weight:																																		
<table border="0"> <tr> <td colspan="2">Incentives</td> <td>M.S.R.P.: 26970.00</td> <td></td> </tr> <tr> <td>Customer: .00</td> <td></td> <td>Internet Price: .00</td> <td></td> </tr> <tr> <td>Dealer: .00</td> <td></td> <td>Dealer Prep: .00</td> <td></td> </tr> <tr> <td></td> <td></td> <td>Dealer Pack: .00</td> <td>ACV: 24748.53</td> </tr> <tr> <td></td> <td></td> <td>Invoice: 24748.53</td> <td></td> </tr> <tr> <td></td> <td></td> <td>Holdback: 789.60</td> <td>Original: 23695.73</td> </tr> <tr> <td></td> <td></td> <td>Advertising: 263.20</td> <td>Internals: .00</td> </tr> <tr> <td></td> <td></td> <td>Pending Repairs: .00</td> <td>Total Book: 23695.73</td> </tr> </table>			Incentives		M.S.R.P.: 26970.00		Customer: .00		Internet Price: .00		Dealer: .00		Dealer Prep: .00				Dealer Pack: .00	ACV: 24748.53			Invoice: 24748.53				Holdback: 789.60	Original: 23695.73			Advertising: 263.20	Internals: .00			Pending Repairs: .00	Total Book: 23695.73
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		Pending Repairs: .00	Total Book: 23695.73																															
<table border="0"> <tr> <td>Options</td> <td></td> <td></td> <td></td> </tr> <tr> <td>PWL</td> <td>PWD</td> <td>CRC</td> <td>CD</td> </tr> </table>			Options				PWL	PWD	CRC	CD																								
Options																																		
PWL	PWD	CRC	CD																															
Exit	< Inventory List >	Print Clear Screen Save																																



Field	Information it displays
<b>Stock Number</b>	Type the stock number. You can also click <b>Inventory List</b> to search for a vehicle in your inventory.
<b>Line</b>	This field displays the line number for the vehicle.
<b>Suffix</b>	This field displays the suffix for the line.
<b>Deal Status</b>	This field displays the status code for the vehicle. The status can be <b>1</b> , <b>2</b> , or <b>3</b> . Codes <b>1</b> (Deal) and <b>2</b> (Delivered) are used when you integrate with the Autosoft Finance Assistant program. Code <b>3</b> (booked) is used when the sale is posted to the general ledger in the Accounting module. You cannot edit this field.
<b>VIN</b>	This field displays the vehicle identification number.
<b>Year</b>	This field displays the vehicle's model year.
<b>New Used (N/U)</b>	This field indicates the vehicle type. It displays <b>N</b> for new or <b>U</b> for used.
<b>Certified</b>	This field indicates if the vehicle is certified. It displays <b>Y</b> for yes or <b>N</b> for no.
<b>Make</b>	This field displays the vehicle's make.
<b>Model Code</b>	This field displays the model code for the vehicle.
<b>Model</b>	This field displays the vehicle's model name.
<b>Body</b>	This field displays the vehicle's body type (sedan, coupe, truck, etc.).
<b>Miles</b>	This field displays the vehicle's mileage.
<b>Date In</b>	This field displays the date the vehicle arrived at the dealership.
<b>In Service</b>	This field displays the date the vehicle was entered into service for warranty purposes.
<b>Color</b>	This field displays the vehicle's color. Only enter the primary color.
<b>Color Codes</b>	This field displays the color codes for the vehicle's color. There are two fields to accommodate two-toned vehicles.
<b>Key Codes</b>	These fields display the key codes for the trunk and ignition keys. There are two fields to accommodate vehicles with separate trunk and ignition keys.
<b>Weight</b>	This field displays the vehicle's weight.
<b>Memo</b>	This field displays any additional information that entered for the vehicle. The entry can be 25 characters long, including spaces.
<b>Source Code</b>	This field displays the source code that identifies how the dealership obtained the vehicle. Sources would be trade, auction, purchase, etc.
<b>From</b>	This field identifies from whom the dealership obtained the vehicle. This would be the customer's name who traded the vehicle, the auction the vehicle was purchased at, etc.
<b>Title</b>	This field displays the vehicle's title number.
<b>Web Download</b>	This field determines if the vehicle will be included in the inventory download list in Web Manager. If you leave the default entry <b>Y</b> , the vehicle is included in the download list. If you type <b>N</b> , the vehicle pulls to the compiled list but is automatically flagged "r" for removed. This allows you to specify which vehicles will be sent to the web before compiling the list so it isn't necessary to edit the list in Web Manager. This field <b>does not</b> prevent vehicles from being sent to vendors for Internet downloads for the Autosoft Data Utilities program.

Field	Information it displays
<b>Customer (Incentives)</b>	This field displays the total value of the customer incentives. This value will also display in the Customer Incentive fields on the Vehicle Information screen in the Accounting module. However, the customer incentive will display as the Factory Rebate on the Set Incentive By Vehicle screen in Desk Manager. The customer incentive is available in the Report Generator as the Factory Rebate.
<b>Dealer (Incentives)</b>	This field displays the total value of the dealer incentives. This value will also display as the Dealer Incentive on the Vehicle Information screen in the Accounting module, on the Set Incentive By Vehicle screen in the Desk Manager module, and in the Report Generator.
<b>Options</b>	These fields display the options on the vehicle. You can enter up to 10 options.
<b>M.S.R.P.</b>	This field displays the manufacturer's suggested retail price. This is also referred to as the asking price.
<b>Dealer Prep</b>	This field displays the total amount of the dealer prep. This is the amount the dealer spent getting the car ready for sale on items such as detailing, rustproofing, fabric protection, etc. This is a non-Accounting figure.
<b>Dealer Pack</b>	This field displays the total amount of the dealer pack. This amount, also referred to as the Lot Fee, is added to the price of the vehicle to calculate commission gross. This amount does not affect the general ledger.
<b>Invoice</b>	This field displays the invoice amount (dealership's purchase price). This figure is from the Factory Invoice for new vehicles. The dealership sets this figure for used vehicles.
<b>Holdback</b>	This field displays the total value of the holdback.
<b>Advertising</b>	This field displays the total value of advertising.
<b>Pending Repairs</b>	This field displays the total value of any pending repairs.
<b>ACV</b>	This field displays the vehicle's actual cash value. The system calculates the ACV by adding the invoice amount, dealer pack, and internals. You cannot edit this field.
<b>Original</b>	This field displays original price of the vehicle. This is usually the invoice price minus the holdback and advertising amount. You cannot edit this field.
<b>Internals</b>	This field displays the total value of the internals. You cannot edit this field.
<b>Total Book</b>	This field displays the vehicle's total book value. The system calculates this value by adding the original price and internals. You cannot edit this field.

## Active Vehicle Invoices

This feature is for DaimlerChrysler dealers. The Autosoft DCID/5300 Utilities software automatically downloads your active invoices from DaimlerChrysler each night. You use this button to view the active invoices. If you do not have the Autosoft DCID/5300 Utilities software installed, you cannot use this feature. The program will display an error message if you select this option.

## Incentives & Packs (Global)

This button advances you to the Set Global Rebates & Packs menu. You use this menu to set rebates, incentives, and packs for groups of vehicles. In order to set the rebate and pack amounts based on model codes, you must have defined your model codes under Model Codes/Grosses in the Desk Manager setup, and there must be model codes entered on the Vehicle Information screen.



### Set Factory Rebate

Use this button to set the factory rebate for a specific model code. The system generates a report that lists the vehicles it updated for your reference.

1. Click **Set Factory Rebate**.
2. Type the model code.
3. Type the rebate amount.
4. When prompted to verify your printer is ready, select your print criteria.

### Set Dealer Rebate

Use this button to set the dealer rebate for a specific model code. The system generates a report that lists the vehicles it updated for your reference.

1. Click **Set Dealer Rebate**.
2. Type the model code.
3. Type the rebate amount.
4. When prompted to verify your printer is ready, select your print criteria.

### **Set Dealer Incentives**

Use this button to set the dealer incentives for a specific model code. The system generates a report that lists the vehicles it updated for your reference.

1. Click **Set Dealer Incentives**.
2. Type the model code.
3. Type the incentive amount.
4. When prompted to verify your printer is ready, select your print criteria.

### **Set Used Car Spiffs**

Use this button to set the spiff amount for used cars aged over a specific number of days. Spiffs are designated amounts used as extra incentive to sell specific cars. The system generates a report that lists the vehicles it updated for your reference.

1. Click **Set Used Car Spiffs**.
2. Type the number of days.
3. Type the spiff amount.
4. When prompted to verify your printer is ready, select your print criteria.

### **Reset All Incentives To None**

Use this button to remove all of the rebates, incentives, and spiffs that have been set.

1. Click **Reset All Incentives To None**.
2. Click **OK** when prompted to verify you want to execute the change.

### **Adjust Vehicle Packs**

Use this button to add or subtract a specific amount from the current pack amount. This does not affect information in the Accounting module. It only updates the information in the Desk Manager.

1. Click **Adjust Vehicle Packs**.
2. If you want to add an amount to the pack, type the amount. If you want to subtract an amount from the pack, type the amount preceded by a minus (-) sign. For example, 10 will add \$10 dollars to the amount, and -10 will subtract \$10 from the amount.
3. Click **OK** when prompted to verify you want to execute the change

## Set All Packs Globally

Use this button to set a pack amount for new, used, or all vehicles. This does not affect information in the Accounting module. It only updates the information in the Desk Manager.

1. Click **Set All Packs Globally**.
2. Type the pack amount.
3. Indicate the vehicle type for the pack. Type **N** for new, **U** for used, or **A** for all.
4. Click **OK** when prompted to verify you want to execute the change.

## Incentives (By Car)

The Set Incentives By Vehicle screen allows you to set incentives for a specific vehicle. You can only edit the incentive fields. You cannot edit any other information on this screen.

1. Click **Incentives (By Car)**. The Set incentives By Vehicle screen appears.
2. Type the stock number of the vehicle. You can also search for a vehicle by entering a partial stock number and clicking **Search**. The screen displays the first vehicle with a stock number that matches the partial number you entered. Click the arrows on each side of the **Search** button to scroll through the vehicle list. Click **<** to display the previous vehicle in stock. Click **>** to display the next vehicle in stock.
3. Type the appropriate desired gross, factory rebate, dealer incentive, incentive program, salesperson spiff, and dealer rebate.
4. Click **Save** to save the information entered.

## Inventory—Sales—Floorplan Analysis

This button advances you to the Inventory Data menu. You use this menu to view the inventory to floorplan FasTrial and to print aged inventory and vehicle sales analysis reports.



### FasTrial Inventory To Floorplan

Use this button to view the inventory FasTrial. The FasTrial displays the total number of vehicles in inventory and their total value, the total number of vehicles in the floorplan and their total value, and the number of vehicles in inventory and the floorplan over 55 days old and their total value.

1. Click **FasTrial Inventory To Floorplan**.
2. Click **New** or **Used** to indicate the FasTrial you want to view.
3. The screen automatically displays information for the total inventory and the floorplan.
4. Click **Back** to close the FasTrial.

### Print Over Age Inventory

Use this button to print an aged inventory report for new or used vehicles. The report will list the stock number, year, make, serial number, inventory amount, account number, floorplan amount, and the number of days the vehicle has been in inventory. The end of the report lists the total number of vehicles on the report and their total value.

1. Click **Print Over Age Inventory**.
2. Indicate the vehicle type for the report. Type **N** for new or **U** for used.
3. Specify the number of days you want to use to generate the report.
4. When prompted to verify your printer is ready, select your print criteria.

## Print Vehicle Sales Analysis

Use this button to print a vehicle sales analysis report for new or used vehicles. The report only includes vehicles that have been floorplanned. The report displays the year, make, model, average cars, cost, low gross, average gross, high gross, low days, average days, and high days.

1. Click **Print Vehicle Sales Analysis**.
2. When prompted to verify your printer is ready, select your print criteria.

## Inventory Marketing Downloads

The Inventory Downloads screen allows you to download inventory information for ProMax<sup>®</sup>, AutoMallUSA.com<sup>®</sup>, and Microsoft<sup>®</sup> Carpoint<sup>®</sup>. The system downloads the information to a 3.5-inch floppy disk.

The screenshot shows a window titled "Inventory Downloads" with a dark background. The main heading is "Inventory Downloads". Below it, there are three numbered options:

- 1 Inventory Download For PRO MAX (Dealer Marketing Services)
- 2 Inventory Download For AUTO MALL USA Dealer Code: [text box]
- 3 Inventory Download For Microsoft Carpoint Dealer ID: [text box]  
PIN: [text box]

At the bottom of the window, there is a "Download To Drive:" label with a small square icon, an "Exit" button, and a "Select:" label with a small square icon.

### Choosing a Download

Each option downloads different information. A brief summary of each option is provided below. Select the option that will include the information you need to download.

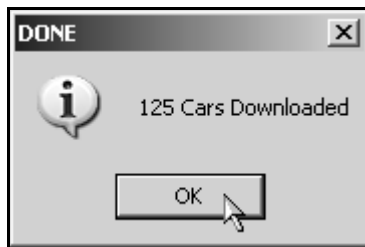
**Pro Max:** This option only downloads used vehicle information. It downloads the stock number, model year, make, model, odometer, VIN, number of days the vehicle has been in inventory, and the total book value (which is the invoice amount plus any internals).

**Auto Mall USA:** This option downloads new and used vehicle information. It downloads the stock number, VIN, make, model, MSRP, model year, odometer, vehicle type (new or used), date the vehicle was entered in stock, and the total book value (which is the original amount plus any internals).

**Microsoft Carpoint:** This option downloads new and used vehicle information. It downloads the stock number, model year, make, model, memo line (description entry), color, odometer, VIN, number of days the vehicle has been in inventory, and the MSRP.

## Downloading the Inventory

1. Click **Inventory Marketing Downloads**. The Inventory Downloads screen appears.
2. Type the selection number, or click the button that corresponds to the download you want to create.
3. If necessary, type the correct dealer code or dealer ID and PIN. These are optional entries. These entries will not affect the success of your download.
4. The **Download To Drive** field defaults to A. If your floppy drive is not drive A, type the corresponding letter in the field instead.
5. Ensure there is a formatted disk in the 3.5-inch floppy drive, and press ENTER.
6. Click **OK** when prompted to verify you want to download the information.
7. When the download is complete, the system will display a message identifying the total number of cars included in the download. Click **OK** to acknowledge the message.



**Tip:** If you receive message stating that there is no disk in the drive or that the disk is bad or receive an error message that tells you to contact Autosoft International, check the disk you are using to ensure it is not defective, write-protected, or full.

## Print R/O Detail

Use this button to print repair order detail for new or used vehicles. A section prints for each vehicle in the car line. The identifying line lists the vehicle's stock number, year, make, model, color, and VIN, the date the vehicle was received, and the number of days in inventory.

The information below the identifying line is divided into two columns. The left column provides the accounting information for the vehicle. It displays the invoice price, holdback, inventory amount, internal totals, total cost, dealer pack amount, and selling price. The right column displays the repair order information. It displays the date, description entered for the repair, and cost.

1. Click **Print R/O Detail**.
2. Click **New** or **Used** to specify if you want the detail for new or used inventory.
3. When prompted to verify your printer is ready, select your print criteria.



## Inventory Analysis

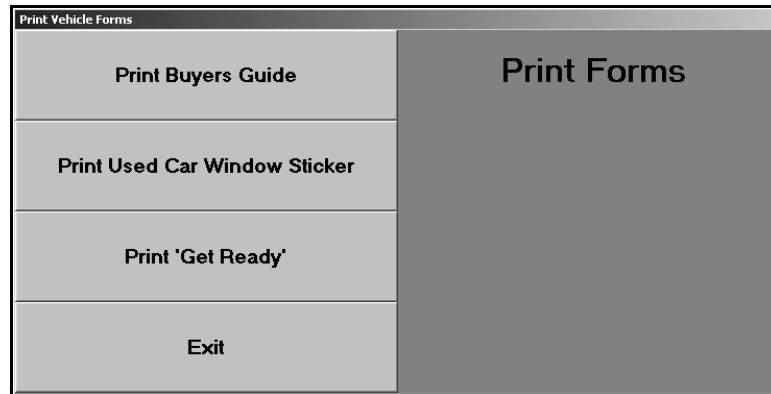
Use this button to print an inventory analysis report. When prompted, select your print criteria. The first part of the report is a new vehicle analysis. The information is grouped by car line. For each line, the report displays the number of vehicles in the line, the total original inventory value, total add-on options, total inventory, the average cost per unit, the total inventory at selling price, and the ratio of cash price to cost. The report also displays the aging information for the car line. The vehicles are divided into the following aging groups: current to 60 days, 60 to 90 days, 90 to 120 days, and over 120 days. For each aging group, the report displays the inventory value. The bottom of the new vehicle section displays the totals for the new vehicle inventory.

The used vehicle analysis section groups the vehicles by model year. For each group, the report displays the number of vehicles in the group, the total original inventory value, total add-on options and repairs, total inventory, the total inventory at selling price, and the ratio of cash price to cost. The report also displays the aging information for the group. The vehicles are divided into the following aging groups: current to 60 days, 60 to 90 days, 90 to 120 days, and over 120 days. For each aging group, the report displays the inventory value. The bottom of the used vehicle section displays the totals for the used vehicle inventory grouped by aging date and price range.

1. Click **Inventory Analysis**.
2. When prompted to verify your printer is ready, select your print criteria.

## Chapter 15 Buyers Guide

The **Buyers Guide** button opens the Print Forms menu. You use this menu to print buyers guides, window stickers, and “get ready” lists. The information that prints for each item on this menu pulls from the Desk Manager setup.



**Tip:** You can only print buyers guides on laser printers in Autosoft FLEX DMS version 6.6. If you use the Autosoft Finance Assistant program, you can print the buyers guides using the F&I printer.

## Print Buyers Guide

The Print Buyers Guide screen lets you to print a buyers guide for a specific vehicle. The system allows you to print the back and front of the buyers guide. The front prints the buyers guide text you select to print for the vehicle. You could have created up to nine buyers guide sets in the setup. The back prints a standard list of defects common to used vehicles. This is the page the customer signs.

1. Click **Print Buyers Guide**.
2. Type the vehicle's stock number. The vehicle's information fills in the fields at the top of the screen.
3. Type the buyers guide parameter set number you want to print, or select the set from the drop-down list. The warranty information fills in on the screen.

4. If necessary, you can edit the information.
5. Click **Print Front** to print the front of the buyers guide.
6. When prompted to verify your printer is ready, click the button that corresponds to the type of printer you are using. You have two options.

Click **Laser** to print the information to a laser printer.

Click **Pin** to print the buyers guide to a pin printer. You can only select this option if you are using pre-printed buyers guide forms.

7. Click **Print Back** to print the back of the buyers guide. When prompted, select your print criteria.

## Print Used Car Window Sticker

Use this button to open the Print Used Car Window Sticker screen to print a window sticker for a specific used vehicle. You specify the options you want to print on the sticker. The screen automatically pulls the options you entered for used vehicles in the Desk Manager setup.

Code	Description	Amount
AC	Air Conditioning	\$ 550.00
AT	Automatic Transmission	\$ 1500.00
NTIRE	New Tires	\$ 400.00
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$

Drag & Drop From List

- AC Air Conditioning
- AT Automatic Transmission
- AT4 Automatic 4-Speed Transmission
- CD CD Player
- CRUIS Cruise Control
- NTIRE New Tires
- PB Power Brakes
- PS Power Steering

1. Click **Print Used Car Window Sticker**.
2. Type the stock number for the vehicle. The vehicle's information fills in on the screen.
3. In **M.S.R.P.**, type the manufacturer's suggested retail price.
4. In the **Code** fields, type a used vehicle option code, and the description will automatically fill in. The bottom of the screen displays list of the codes you entered. You can drag an option from the list window on the bottom of the screen to a **Code** field at the top of the screen. (You created the used vehicle option codes in the Desk Manager setup.)
5. The **Amount** fields automatically fill in with the price entered for the code. You can edit the amount or add an amount if no default price is set. If no price is entered, the sticker will print with an N/C for "no charge" next to the option.
6. Click **Print** to print the sticker.
7. When prompted to verify your printer is ready, select your print criteria.

## Print 'Get Ready'

Use the Print "Get Ready" screen to print a checklist for a specific vehicle. You created the "Get Ready" list under 'Get Ready' Text in the Desk Manager setup.

This module prints a Service and/or Body Shop 'Get Ready' form. The text that will print may be edited from the System Parameters Menu. Several copies of the form may be printed for the Stock Number entered. You may then circle the department desired and check the desired operations. If an internal is written to recondition or repair a vehicle, the estimated repair cost entered below will be added to that vehicle as a Pending R/D

Stock No.:

Number Of Copies To Print:

Special Instructions .....

Current Pending Repairs:

Estimated cost of repairs:

Safety Check  Fabric Prot.

Oil Change  Ext. Gloss

Tires  Body Work

State Insp.  Brush Touch

Emissions  Radio

Tune Up

Moldings

Stripes

Door Guards

Flaps

Rustproof

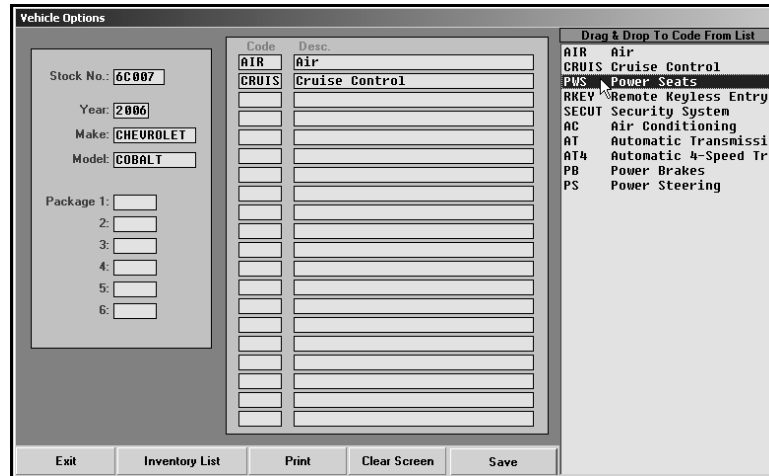
Sound Guard  Gas - Gallons

Exit Clear Print

1. Click Print '**Get Ready**'.
2. Type the stock number.
3. Type the number of copies of the list you want to print.
4. Type any special instructions you want to print on the list.
5. If there will be internal repairs to the vehicle, type the estimated cost of the repairs.
6. The right side of the screen lists all the items entered for the list in the setup. Click to select the items you want to print on the list for this vehicle.
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**.

## Chapter 16 View Options

Use the Options screen to view the options on a vehicle. You can also add options to a vehicle's file on this screen. You entered option codes under Vehicle Options in the Desk Manager setup. When you enter the code, the description automatically fills in. You can manually type descriptions for options that do not have codes in the setup.



### Viewing Options

1. Click **View Options**. The Options screen appears.
2. Type the vehicle's stock number. You can also search for a vehicle by clicking Inventory List. Select the car line, and click the vehicle in the list you want to view.
3. The vehicle information fills in on the screen.
4. The six **Package** fields display any options entered for the vehicle when it was originally added to inventory.
5. To add an option, type the option code in the **Code** field, or drag and drop an option from the list on the right side of the screen to the **Code** field.
6. The description for the code fills in the **Desc.** field. If necessary, you can manually type a description without entering an option code.
7. Click **Save** to save the information entered. The screen clears so you can select another vehicle.

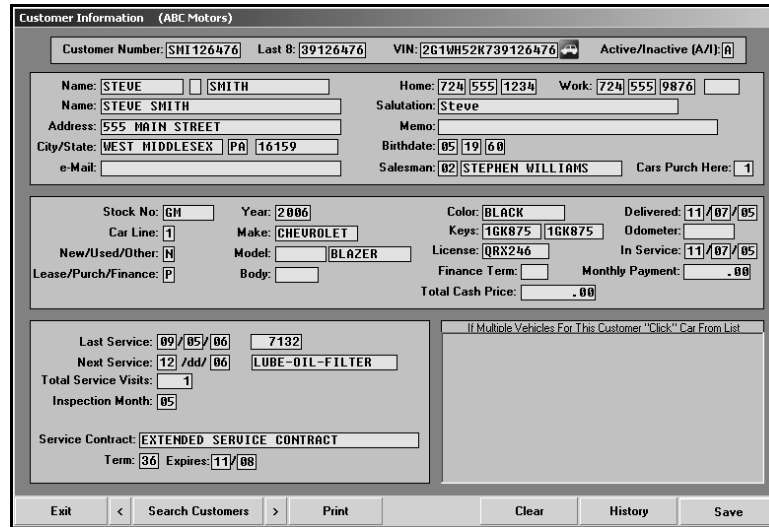
## Printing Options

You can print the options as needed. The printout only prints the options added on the bottom part of the View Options screen. It does not print the options in the top six option fields.

1. Click **Print** to print the vehicle options you added.
2. When prompted to verify your printer is ready, select your print criteria.

## Chapter 17 Customer History

The Customer Information screen lets you view a customer's service history. If necessary, you can enter or edit customer information on this screen. Because the information displayed on this screen is pulled from the customer's file in Service Writing, any information you enter on this screen is automatically updated to the Customer Information screen in the Service Writing module.



The screen has four sections that display specific information.

- The first section displays the customer number, last eight digits of the VIN, and the complete VIN. The last field in this section identifies if this is an active or inactive customer. You cannot edit information in this section.
- The next section displays the customer's information. You can edit this information.
- The third section displays the vehicle information. You can edit this information.
- The last section displays the vehicle's service information. The left side identifies the most recent service information and warranty information. The system automatically updates this information as the customer brings the vehicle in for service. The right side displays all of the vehicles on file for the customer. You can click a vehicle in the list to view the information for that vehicle. For each vehicle, the screen lists the delivery date, purchase amount, and total value of the customer's service repairs.



## Recalling a Customer's Information

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

- Type 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.
- Type the first three letters of the customer's last name in the **Customer Number** field, and click **Search Customers** (or press F3). The system displays a list of customer's whose last name begins with the letters. Click the customer in the list you want to select, and the customer's information fills in on the screen.
- Type 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 the arrow buttons on the side of the **Search Customers** button to scroll through the records. Click **<** to display the previous customer's information. Click **>** to display the next customer's information. The customer's information is displayed on the screen. (You can also scroll by pressing F2 to view the previous record and F4 to view the next record.)
- Click **Search Customers** (or press F3). On the Customer Search Criteria screen, type the last four digits of the customer's phone number, the first three letters of the customer's last name, or the customer's license plate number. A list of the customers who meet the criteria you entered appears. Click the customer you want to select. The customer's information fills in on the screen.

## Editing a Customer's Information

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

## Viewing a Customer's Service History

1. Select the customer.
2. Click **History** to display a list of repair orders in the customer's service history.
3. Click a repair order to view it. (If necessary, you can print the repair order from the viewing screen.)
4. Click **Back** to close the repair order.

## Printing the Information

Click **Print** to print the customer's information. In addition to the customer and vehicle information, the printout lists all of the service dates for the vehicle.



Part III Showroom Traffic