Autosoft ►FLEX™

DMS

Sales Management

Autosoft
Dealer Management System™

Table of Contents

Introduction FLEX DMS Sales Management

The sales management part of the Autosoft FLEX DMS system consists of four modules: CSI & SSI, Desk Manager, Traffic, and Marketing. Together, these modules help you manage your Sales and Service Departments. Within these modules, there are varieties of direct mail and marketing features. You can generate marketing lists, conduct surveys, and print sales reports, inventory reports, customer letters, and mailing labels.
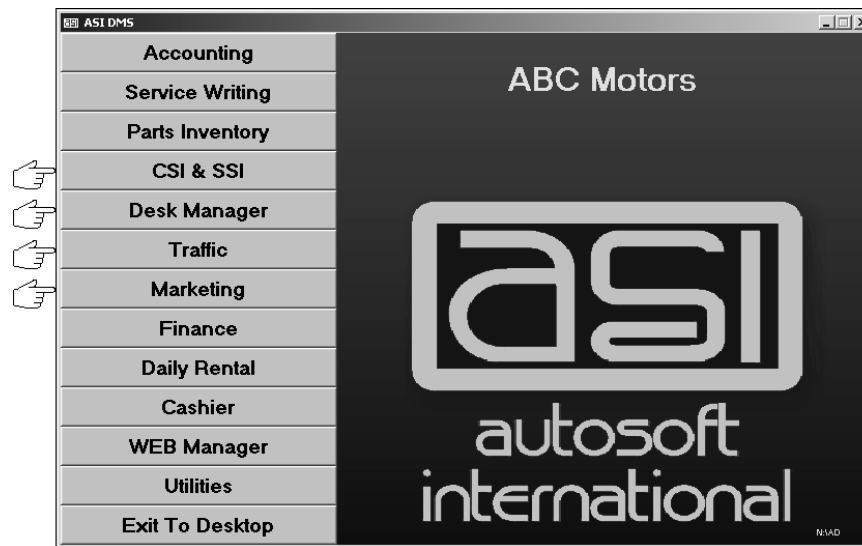
Below is a brief description of the Sales Management modules. Refer to the specified section of this manual for instructions on each module.

CSI & SSI: The Customer Survey Index and Sales Survey Index module allows you to generate customer followup lists you can use to conduct phone surveys and to print customer followup letters.

Desk Manager: This module allows you to locate vehicles in your inventory, calculate payments, view sales statistics, and print worksheets, buyers guides, and window stickers.

Traffic: The Traffic module allows the sales department to track prospects that come into the dealership.

Marketing: The Marketing module allows you to generate marketing lists and print marketing letters.

Important Program Basics

Before you begin using the Sales Management modules, there are a few basic pieces of information you need to understand. This information refers to the basic makeup of the program and features that can be used to assist you as you work. You should become familiar with the information in this section since it is important for the day-to-day operation of the program.

Understanding Menus

The program is made up of menus and input screens. Menus are screens that display all of the options for a particular area of the program. With the mouse, click on the button that corresponds to the option you want to select. When you select an option from a menu, you will open the corresponding submenu, input screen, or prompt. The following is an example of a menu.

Understanding Entry Screens

Input screens consist of data fields that accept input or display previously entered data. Each field is labeled to indicate the data it requires. The following is an example of an input screen.

It is important to note that some fields only accept specific information. For example, you cannot enter alpha characters in a strictly numeric field, such as a date field or dollar amount field. Dollar amount fields do not accept two decimal points. It is a common error when entering dollar values to forget to include the decimal point. The system automatically adds .00 after whole dollar amounts. For example, if you enter 5, the system will make the entry 5.00. If you enter 500, the system makes the entry 500.00. If you enter 5.00, the system leaves the value as you entered it. Always double-check the dollar values entered to ensure the amount will be posted the way it needs to be posted.

Understanding Prompts

The program also contains prompts to assist you as you work. Prompts appear when you select to print reports or update information to master files. The prompts indicate the information you need to specify or the action you need to take. For example, when you generate a report, the system may prompt you to enter the criteria you want to use for the report, and the system will prompt you to indicate if you want to view the report on your screen or print the report to paper.

Prompts also serve as a way for the system to communicate with you. In certain areas of the program, the system prompts you when it completes a task. This is the systems way of informing you that it successfully carried out an action. For these prompts, click **OK** to acknowledge the message and to continue working. The system will also prompt you to indicate errors in entries or selections you are trying to make. Read the prompt to ensure you understand the problem, and click **OK** to continue working.

The important thing to remember about prompts is that you should always read the prompts that appear on the screen to ensure you understand exactly what will happen before you continue.

Using the Keyboard and Mouse

You can use the mouse or keyboard throughout the program to maneuver through the input screens and to carry out common functions on entry screens. The ability to use the keyboard to maneuver through the screens as you enter information allows you to work quickly since you do not have to take you hands off the keyboard to use the mouse while you are working. The following chart identifies the keystrokes you can use to maneuver through the entry screens.

Key	What it does
ENTER	Move to the next field
Up Arrow	Move to the previous field
Down Arrow	Move to the next field
Shift + Tab	Move to the previous field

Similarly, each button in the program has a corresponding function key. You can click on the button or press the corresponding function key. (When using the keyboard to select an option, it is not necessary to press ENTER.) The following chart lists common buttons and function keys you should learn. These are the most frequently available commands in the program.

Button	Function Key	What it does
Back	**ESC**	Close a list or the current screen
Exit	**ESC**	Close to the current screen
Help	**F1**	Display the help page
<<	**F2**	Display the previous record
List	**F3**	Display a search list to select an existing entry
>>	**F4**	Display the next record
Print	**F6**	Print a copy of the information on the screen
Delete	**F8**	Delete a record
Clear	**F9**	Clear a record from the screen

Using Help

Because the Autosoft FLEX DMS program is continuously changing to meet the needs of our customers, new features are added to the software. These changes will include the addition of fields, buttons, or screens. This manual represents the program as it is now.

To keep our documentation updated, and our users informed, we have added individual help pages to each screen in the program. Press F1 to display the help page. Each page provides instructions for using the current screen or menu. These help pages are updated as changes are made to the program and added to your system when you run an update from the Internet; thus, the help pages are always current. You should become familiar with the help page feature and use it to learn about the new information added to the program and as a way to quickly access information while you are on a screen.

Responding to the Date and Time Prompt

The first time you enter the any of the Sales Management modules each day, the system prompts you to verify that the system date and time are correct on your computer. If the date and time are not correct, use the arrow buttons to increase or decrease the values as needed. It is important that the system date and time are correct.
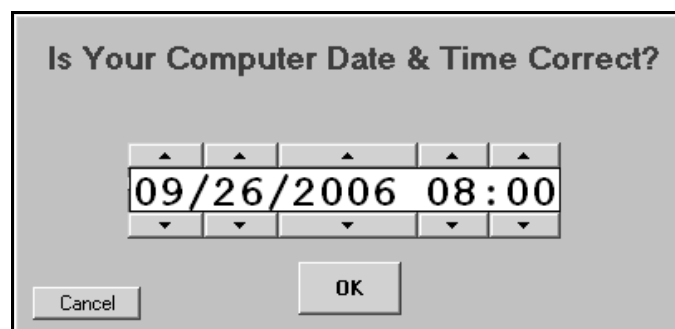
In addition, the prompt displays the user ID that will be used to log the information entered in the system. If you need to use a different ID, enter the ID. Always verify the date, time, and ID before clicking **OK** to accept the information.

Getting Ready

Now that you understand the program basics, you can begin learning how to use each Sales Management module. Until you are familiar with the instructions in this manual, you should keep it close as you work so you can refer to it as needed. Also, remember that you can press F1 on any screen of menu to view the help page to assist you as you work, too.

![Autosoft Dealer Management System]

Chapter 1 CSI/SSI Overview and Setup

The Customer Survey Index (CSI) and Sales Survey Index (SSI) module allows you to perform follow-up for service and sales customers. You can conduct telephone surveys, record results for mailed surveys, and generate reports based on the survey results. This module is a valuable tool for measuring customer satisfaction and identifying your dealership's strong and weak points concerning customer service.
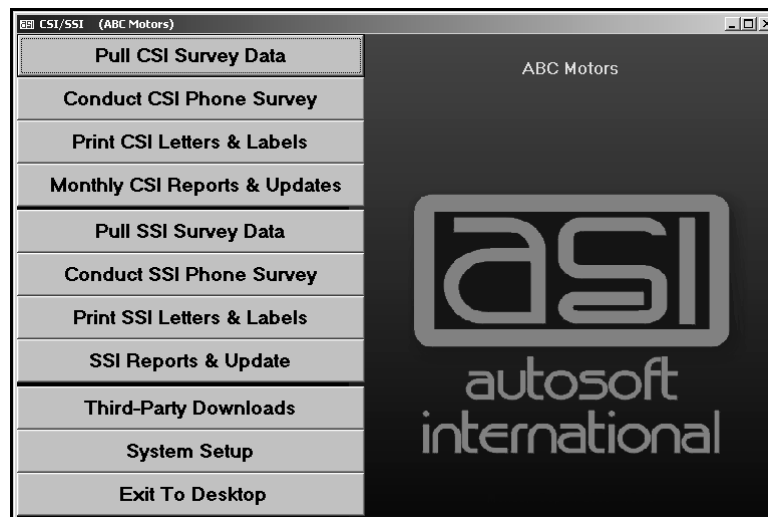
Downloading Information for Third-Party Software

If your dealership uses third-party software to perform follow-up, use **Third Party Downloads** button to open the Third-Party Downloads menu. The options on this menu allow you to download information from Autosoft FLEX DMS for the third-party software. Click the button that corresponds to the software program you use for follow-up to open the downloading menu for that software. Press F1 while on the submenu to view downloading instructions specific to that software.

Entering Setup Information

The first thing you need to do is enter your setup information. Click **System Setup** to open the System Setup menu. The menu is divided into two parts. The top part contains options that allow you to enter survey questions, comments, and advisor and technician information used for CSI. The bottom part of the menu contains options that allow you enter survey questions and salespeople's information used for SSI. The last menu option allows you to create letters you can print for both CSI and SSI. Once you begin conducting surveys, you can use this menu to view the survey statistics for advisors, technicians, the dealership, the purchased vehicles, and the salespeople.
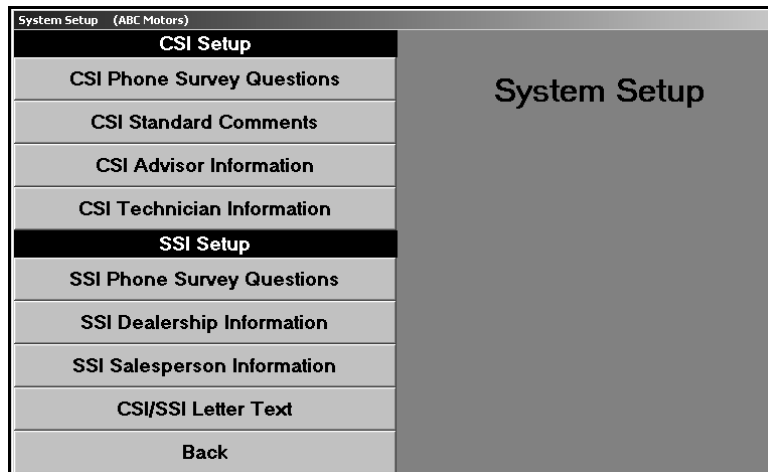
CSI Phone Survey Questions

You can enter up to four survey questions that allow the customers to rate their experience on a scale from 1 to 5. The system comes with default questions. You can edit these questions or enter your own questions to meet your dealership's survey needs. Just type a question in each field, and click **Save**. Each line holds up to 45 characters. The first question should be specific to the technician's performance. All of the questions will apply to the service advisor. If you edit the fields and want to restore the default questions, click **Fill With Defaults**.
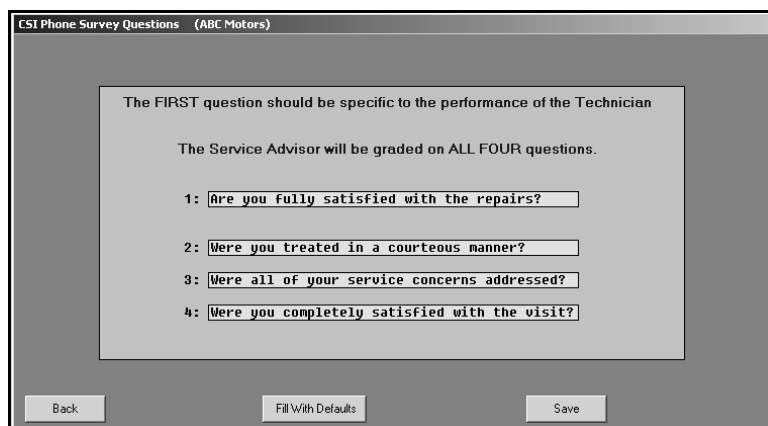
CSI Standard Comments

This option allows you to enter standard customer comments. These comments are available when you conduct phone surveys to quickly enter customers' responses. When creating comments, it is not necessary to create an entry for every possible comment. Instead, you are creating comment categories that will be used to group customer comments. Although the comments print on various printouts, they serve mostly as a way for the person conducting the surveys to pick up on reoccurring issues that come up during the surveys so the issues can be addressed immediately.

Use the **Comment No.** field to assign the comment an ID number. In **Comment**, type a brief comment. This field holds up to 30 characters, including spaces. Click **Save** to save the comment. The comment appears in the list window on the right side of the screen.

As you enter survey results, the system automatically tracks the number of times each comment was used during the current month and during the current year. Just enter the comment number, or click the comment in the list to view the activity.

You can print the statistics for all the comments by clicking **Print**. When prompted to verify your printer is ready, select your print criteria. The printout lists the monthly and yearly activity for each code. This may help you identify codes you do not use.

If you want to delete a comment, select the comment from the list, and click **Delete**. Click **OK** when prompted to verify you want to delete the record. The comment is removed from the list.

CSI Advisor Information

If you integrate with Service Writing, the Service Advisors screen automatically pulls the advisors entered in the Service Writing setup. The list window on the right side of the screen lists all of the advisors in the system.

If you do not integrate with Service Writing, you will need to enter the advisors. To add an advisor, enter a two-digit advisor code and the advisor's name. Click **Save** to save the information. The advisor appears in the list window on the right side of the screen.

Once you begin entering surveys into the system, you can use this screen to view customer satisfaction survey ratings for each advisor. Enter the advisor's two-digit code, or click the advisor in the list window on the right side of the screen.

The middle part of the screen displays the advisor's customer satisfaction survey ratings. The information identifies the number of customer surveys (units) conducted for each month and the advisor's estimated percentage rating for each of the survey questions (entered on the CSI Phone Survey Questions screen).

Click **Print** to print the statistics for all of the advisors. When prompted to verify your printer is ready, select your print criteria.

CSI Technician Information

The Technician Information screen works like the Service Advisors screen. If you integrate with Service Writing, the screen automatically pulls the technicians entered in the Service Writing setup. If you do not integrate with Service Writing, you will need to enter the technicians. The middle of the screen will display the customer satisfaction survey ratings for each technician once you begin entering survey results into the system.

```
Technician Information    (ABC Motors)                          01  TOM
                                                                02  STEPHEN
                                                                03  DAVID
                                                                04  FRANCIS
                                                                05  FRED
                   Code: 01                                     06  JOHN
                                                                07  STEVE
                   Name: TOM                                    08  RALPH
                                                                09  DARRELL
                          CSI Scores
            Mo      Unit      a.        b.

            01       0
            02       0
            03       0
            04       0
            05       0
            06       0
            07       0
            08       0
            09       0
            10       0
            11       0
            12       0


            Back          Save          Print          Delete
```

SSI Phone Survey Questions

The SSI questions allow customers to rate their sales experience on a scale from 1 to 5. The top four fields are for questions about the dealership's performance. The last four fields are for questions about the salesperson's performance. The system comes with default questions. You can edit these questions or enter your own questions to meet your dealership's survey needs. Just type a question in each field, and click **Save** to save the questions. If you edit the fields and want to restore the default questions, press the F9 key on your keyboard.

```
SSI Phone Survey Questions    (ABC Motors)

        Dealership Performance
        2a. Were you greeted promptly and professionally?
        2b. Were you satisfied with the vehicle selection?
        2c. Would you recommend this delaership to a friend/relative?
        2d. How do you rate your overall satisfaction with the dealer?


        Salesman Performance
        3a. How would you rate the salesperson's product knowledge?
        3b. Would you purchase your next vehicle from this salesperson?
        3c. Were the owner's and warranty manuals explained?
        3d. Were the vehicle features and controls demonstrated?
        3e. How do you rate the salespersons overall performance?


        Back                                            Save
```

SSI Dealership Information

After you begin entering survey results in SSI, you use this screen to view customer satisfaction survey ratings for vehicles, the dealership, and salespeople. The information on this screen is updated for statistical analysis every time you use the **Survey Update** button on the SSI Phone Survey menu. The update removes the completed SSI Surveys from the active list, compiles the survey data, and makes the results available on SSI reports.

Click the button on the bottom of the screen that corresponds to the statistics you want to view: Vehicle, Dealership, or Salesman. The screen displays the number of customer surveys (units) conducted for each month and the estimated percentage rating for each survey question. The number of columns that display information depends on which statistics you selected to view.

SSI Salesperson Information

If you integrate with Accounting, Desk Manager, and Traffic, the Salesman Information screen automatically pulls the salespeople entered in those modules. If you do not integrate with these modules, you will need to enter the salespeople. Type a two-digit salesperson code and the salesperson's name, and click **Save** to save the information. Click **Delete** to remove salespeople as needed. Remember, this removes the salespeople from Accounting, Desk Manager, and Traffic, too. The middle of the screen will display the customer satisfaction survey ratings for each salesperson once you begin entering survey results into the system.

CSI/SSI Letter Text

The Design Letters screen allows you to create letters. All letters created in the CSI/SSI, Showroom Traffic, and Marketing modules are available in a common letter database. Therefore, letters you create on this screen are available in Showroom Traffic and Marketing, and letters created in Showroom Traffic and Marketing are available in CSI/SSI. Similarly, any changes you make to letters here automatically update the letters in Showroom Traffic and Marketing, too.

```
Design Letters   (ABC Motors)

     Letter No.: 01   Description: THANK YOU FOR VISITING OUR DEALERSHIP

                                   Dear \CN

                                   I would like to take this opportunity to thank you for coming into
                                   our dealership.   Although you have not yet made the final decision
                                   on your new car purchase, it is my concern that you were happy with
     Start On Line: 5              the treatment you received from our sales staff while you were here.

     Suppress ....                 We realize that the purchase of a vehicle is a big decision to make,
                     Date □        and this is why we strive to make your next vehicle putchase an
                  Address □        enjoyable experience at ABC Motors.

                                   It is our philosophy to offer a good product and good service at a
                                   mutually agreeable price.   I welcome any questions or comments
                                   that you may have.  Feel free to contact me at any time.  Our
                                   ability to satisfy our customers is the reason we are in business
                   Save            today.

                                   Although you may not have found the exact vehicle you were looking
                                   for, please keep in mind that we receive many cars and trucks each
                                   day.  It may be possible for us to locate the exact vehicle that
                                   you need in a very short time.

                                   If I can be of any further assistance to you, please don't hesitate
                                   to call or stop in.  We are here to serve you from 9 a.m. until
                                   6 p.m. weekdays, and 9 to noon on Saturdays.

       List        Print           Looking Forward to seeing you,

       Exit        Help
```

You can create any type of letter, but you cannot format the letter font. All letters print using Times New Roman 12 point font. The system will pull customer information and use it to create the header (customer's name and address). You can have the system pull customer-specific information and add it to the letter by using specific merge codes preceded by a backslash (\). Below is a list of codes you can use in the letters. You can display this list by clicking **Help** on this screen.

> **** for ignore the line
>
> **\CN** for customer's name (salutation line)
>
> **\DN** for dealership's name
>
> **\MD** for vehicle's model
>
> **\MK** for vehicle's make
>
> **\PN** for prospect's name (salutation line)
>
> **\SG** for sender's name (signature line)
>
> **\SM** for salesperson's name
>
> **\TI** for sender's title
>
> **\YR** for vehicle's model year.

Tip: If the customer's name is not printing for the \CN code, the salutation for the customer has not been entered for that customer record. You can add, edit, or delete the salutation for each customer on the Edit Compiled List screen for both CSI and SSI letters.

Creating a New Letter

1. Assign a number to the letter you are creating. (Click **List** to view a list of existing letters.)

2. Type a description of the letter.

3. Indicate the start line. The start line is the same as the top margin. This determines how far down on the paper the text begins printing.

4. Select if you want the date and address suppressed. Click the box to select it, and a checkmark appears in the box. Click the box again to clear the checkmark.

5. Use the white area to type your letter. ***You must press ENTER*** to force line breaks as you type, or the text will not print properly.

6. Insert the merge codes where needed. If you are entering more than one merge code, be sure to leave a space in between the codes so the merged information prints properly.

7. When you are finished typing the letter, click **Save**.

8. Click **Print** to print a copy of the letter to ensure it prints properly. Make changes as needed.

Editing a Letter

Once you create a letter, you cannot delete it. If you find that you do not want a letter you created, simply give the letter a new description, edit the letter text, and save the letter.

1. Type the letter number, or click **List** to display a list of existing letters. Click on the letter in the list you want to view.

2. The screen displays the selected letter.

3. Edit the information as needed.

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

Tip: If a letter is not printing correctly, you may need to delete the text and retype the letter.

Once you enter your system information, you can begin conducting CSI and SSI follow-up.

Chapter 2 CSI Follow-Up

The first four buttons on the CSI/SSI menu are for CSI follow-up. The buttons are organized on the menu systematically. Work your way through each menu option.

Pulling CSI Survey Data

You begin your CSI follow-up by pulling the survey data you want to use. Click **Pull CSI Survey Data** to open the CSI Working Data menu. When the menu opens, the system prompts you to select the working data. The dates refer to the dates the Service Department closed the repair orders in the Service Writing module. The list includes the last six days of repair orders updated using the Daily R/O Update.

CSI Working Data   (ABC Motors)

Select CSI Data From Service Writing

Print CSI Short List From V

Select Working Data

Available Data....

Closed On   09/11/06
Closed On   09/08/06
Closed On   09/07/06
Closed On   09/06/06
Closed On   09/05/06
None Available

Followup Sheets From

View/Edit Working

Pull Working Data To Ph

Abort

Back
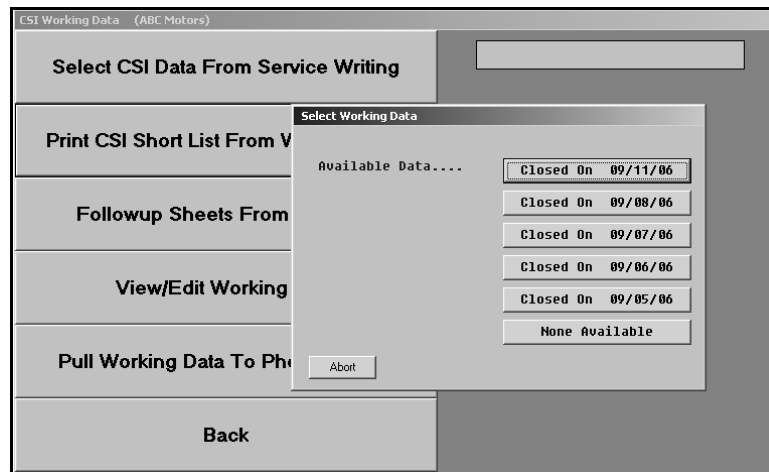
The dates on your menu should appear in order from the most recent date to the oldest date. If the menu is missing a date, Service did not perform a Daily R/O Update on that date. Similarly, if Service performs multiple Daily R/O Updates, the menu will displays the same date on multiple buttons. If an older date appears in the list, it is possible that a repair order has customer pay and warranty on it. The warranty on the repair order could stay open for days, weeks, or months. When Service closes the warranty repair, the old date of when Service originally opened the repair order will appear in the list.

Click the date you want to select, and the menu options on the CSI Working Data menu correspond to data you selected. Click **Select Working Data From Service Writing** to open the working list again as needed. Once you select the data, use the remaining menu options to view, edit, print, and update the survey list.

Tip: The customer's "On Do Not Call List" entry in the customer information file determines if a customer is pulled to the phone survey list.

Print CSI Short List From Working Data

Use this button to print a list of customers pulled from the working data. The list prints four closed repair orders per page. It displays the customer's name, address, and phone number, the repair order closing date, the vehicle's year, make, and model, the advisor and technician for the repair order, and the followup survey questions.

1. Click **Print CSI Short List From Working Data**.

2. When prompted to verify your printer is ready, click to select **To Printer** to print the information or **To Screen** to view the information on your screen.

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

Followup Sheets From CSI Data

Use this button to print the followup sheets from the working data. One repair order will print per page. The printout lists the customer's information, service history, and the followup survey questions.

1. Click **Followup Sheets From CSI Data**.

2. In **Start With**, type the repair order number you want to print or use as the starting point. You can also click on the "Click for List" message to select the customer from a list. To print all of the repair orders, leave the field blank.

3. When prompted to verify your printer is ready, select your print criteria.

View/Edit Working Data

Use this button to open the Edit Compiled List screen to view the list of closed repair orders in the current working list and to change the status of repair orders as needed. You can only print followup sheets for active repair orders.

1. Click **View/Edit Working Data**. The Edit Complied List screen appears and displays all of the repair orders on the list.

2. Click **More** or **All** to view additional repair orders or the complete list of repair orders as needed.

3. Click repair order to change its status from "Active" to "Removed" or from "Removed" to "Active."

4. Click **Back** when you are finished editing the list.

Pull Working Data To Phone Survey

Use this button to pull the working data to a phone survey list. You can view the list from the CSI Phone Survey menu using the **View Phone Survey List button**.

4. Click **Pull Working Data To Phone Survey**.

5. Click **OK** when prompted to verify you want to pull the data.

Conduct CSI Surveys

Once you compile and pull the survey data, you are ready to conduct the surveys. Click **Conduct CSI Phone Survey** to open the CSI Phone Survey menu. You use this menu to conduct and manage your CSI surveys. The options allow you to conduct phone surveys and enter results of mailed surveys. In addition, you can print reports based on the survey information, including a "Red Eye" report that indicates customers who need immediate attention.

```
CSI Phone Survey    (ABC Motors)

        Conduct Phone Surveys
        Enter 'Mailed' Surveys                CSI Phone survey
        Print 'Red Eye' Report
        Print Daily Report
        DAILY Survey Update
        List Uncompleted Surveys
        Purge Stale Surveys
        View Phone Survey List
        Back
```
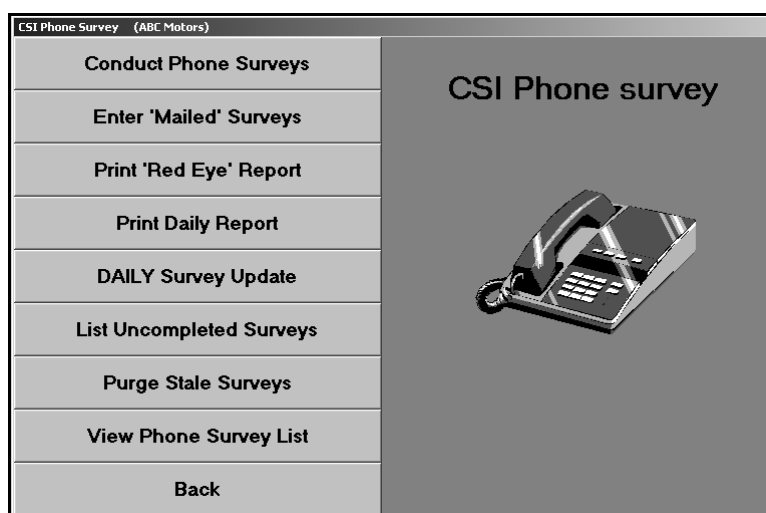
Conduct Phone Surveys

Use this button to open the CSI Phone Survey screen to conduct phone surveys. The screen displays all of the CSI survey questions you entered in the System Setup, so all you have to do is follow the questions on the screen and record the customer's response.

1. Click **Conduct Phone Surveys**. The CSI Phone Survey screen appears.

2. The right side of the screen lists the customers on the survey list. Type the repair order number, or click the customer in the list you want to select. You can also click the arrow buttons on each side of the **Survey List** button to scroll through the list.

3. The top of the screen displays the customer's name, address, and phone numbers, as well as the number of times the dealership has attempted to contact the customer. The bottom part of the screen displays the customer's name, so you can ask for the customer by name.

4. At this point, you have several options depending on the scenario.

The Customer is Interested in Participating in the Survey

    a.   If the customer is home and wants to participate in the survey, click **Continue**.

    b.   The next screen displays four CSI survey questions. Read each question, and type the rating number. You can also click to select the appropriate rating. When you have asked all of the questions, click **Next**.

c.   The next screen allows you to enter two customer comments. Each comment field holds up to 60 characters. You can type the comments or use the standard comments entered in the System Setup. The right side of the screen displays the list of standard comments. Type the comment number, or click a comment in the list to select it.

Comments are not required entries, and you do not want to record every comment verbatim. Instead, you want to summarize the general idea. In reality, you will not be tracking individual comments to follow up on each one. Instead, comments serve mostly as a way for the person conducting the surveys to pick up on reoccurring issues that need to be addressed immediately. For example, if customers keep making negative comments about the waiting room, the surveyor would make note of this and inform the appropriate parties in the dealership so the situation could be addressed. If a customer is passionate about complaint, you should flag the customer as a "red eye" rather than just record the comment.

d.   Indicate if this is a "Red Eye" customer by typing **Y** for yes or **N** for no in the **Red Eye** field. Red-eye customers are customers who require immediate attention from the dealership. You can print a list of these customers using the **Print 'Red Eye' Report** button on the CSI Phone Survey menu.

e.   Click **Finish** to save the survey.

f.   The system marks the survey as "Completed" and returns you to the initial CSI Phone Survey screen.

g.   The CSI Phone Survey screen automatically displays the information for the next customer in the list. Continue to conduct surveys. The system displays a "That's All" message when you reach the end of the survey list. If necessary, you can exit the screen and return later to complete the surveys.

The Customer is not Interested in Participating in the Survey

    a.   If the customer is not interested in participating in the survey and you want to document this, click **Next** on this screen.

    b.   Click **Next** on the screen that displays the questions. This will take you to the comment screen.

    c.   Type a comment stating the customer is not interested in the survey. If you created a standard comment for this situation, select the comment from the comment list.

    d.   Click **Finish** to save the comment. This marks the survey as "Completed" and documents the comment.

Tip: You can click to select the **Add This Customer To "Do Not Call List"** box to flag that this customer is on the do not call list and should not be contacted. This will add the flag to the customer's service record and will prevent the customer from being pulled to future survey lists.

The Customer is not Home

    a.   If the customer is not home, type a time that you can reach the customer.

    b.   Click **Next**.

    c.   Then, click **Abort**. The system saves the time you entered the "response" and keeps the customer "Active" in the phone survey list. The CSI Phone Survey screen displays the "Last Call" information when you select the customer to attempt to complete the survey again. The list of uncompleted surveys lists the number of times you attempted to contact the customer. The number of "tries" is based on the number of times you aborted the survey.

Another Action Needs to be Taken

    a.   If you need to take another action, type the appropriate letter in the field at the bottom of the screen.

        Type **A** to abort the survey. Using "A" for abort ensures the system tracks the number of times you attempt to contact the customer.

        Type **N** to take no action.

        Type **L** to flag the customer to receive a letter.

    b.   The customer's status in the phone list displays the selection.

Removing Surveys from the List

1. Select the customer.

2. Click **Remove**.

3. Click **OK** when prompted to verify you want to delete the record. The customer is removed from the list.

Enter 'Mailed' Surveys

Use this button to open the Enter "Mailed" CSI Survey Replies screen to enter the results of surveys you mailed to customers.

1. Click **Enter 'Mailed' Surveys**. The Entered "Mailed" CSI Survey Replies screen appears.

4. Type the repair order number, or click **Survey List** to select the repair order from the phone survey list. Click on the customer you want to select. (You can also click the arrow buttons on each side of the **Survey List** button to scroll through the list.)

5. The top of the screen displays the customer's name, address, and phone numbers.

6. The next part of the screen displays the four CSI survey questions you entered in the System Setup. For each question, type the rating number, or click to select the appropriate rating. The first column is for rating 1, the second for rating 2, etc.

7. Next, type up to two customer comments. Each comment field holds up to 60 characters. You can type the comments or use the standard comments entered in the System Setup. To use the standard comments, type the comment number, or click **Comments List** to display a list of the available comments. Click on a comment to select it.

8. Indicate if this is a "Red Eye" customer by typing **Y** for yes or **N** for no in the **Red Eye** field.

9. The system will mark the survey as "Completed." If you do not fill in the **Red Eye** field, you must click **Save** to save the information.

Deleting a Survey

1. Select the customer.

2. Click **Delete**.

3. Click **OK** when prompted to verify you want to delete the record. The customer is removed from the list.

Print 'Red Eye' Report

Use this button to print a list of customers flagged as "Red Eye." These customers need immediate attention. The report displays the customer's name, phone number, and survey comments.

1. Click **Print 'Red Eye' Report**.

2. When prompted to verify your printer is ready, click to select **To Printer** to print the information or **To Screen** to view the information on your screen.

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

Print Daily Report

Use this button to print a report that indicates the survey activity for the day. The report displays the repair order number, service date, customer's name, vehicle's year, make, and model, the advisor for the repair order and the advisor's average score for the survey, the technician for the repair order and the technician's average score for the survey, and the customer's comments. The report also displays the number of follow-ups completed and the average scores for the department and technician. An asterisk (∗) prints next to the customers who gave a dissatisfied response (1—very dissatisfied or 2—dissatisfied) to any questions. This allows you to quickly identify these responses.

1. Click **Print Daily Report**.

2. When prompted to verify your printer is ready, select your print criteria.

DAILY Survey Update

Use this button to compile the survey information. This generates the survey statistics and updates them to the advisors' and technicians' files. You can view the information from the advisors' and technicians' files from the System Setup menu or by printing the Month-To-Date Dealer Report. The update removes all completed surveys from the survey list; if you want to print letters for customers who completed the surveys, do not complete the daily update until after you print the letters.

1. Click **Daily Survey Update**.

2. Click **OK** when prompted to verify you want to update the information.

List Uncompleted Surveys

Use this button to print a list of the customers that have not completed their survey. The list displays the repair order number, customer's name, service date, number of days since the service date, and the number of times the dealership has attempted to contact the customer.

1. Click **List Uncompleted Surveys**.

2. When prompted to verify your printer is ready, select your print criteria.

Purge Stale Surveys

Use this button to remove surveys older than a specified number of days from the system. This removes *__all__* surveys older than the specified number of days, regardless of the status.

1. Click **Purge Stale Surveys**.

2. Type the number of days you want to use to delete the surveys.

3. Click **OK** when prompted to verify you want to purge the surveys.

View Phone Survey List

Use this button to view the list of customers on the phone survey list. The list will indicate which customers have completed the surveys and which customers are still active and need to complete the survey.

Printing CSI Followup Letters

After you conduct the surveys, you print followup letters as needed. Click **Print CSI Letters & Labels** to open the Print Letters/Labels menu. You use this menu to print CSI customer letters and mailing labels. When printing letters, you must specify the letter you want to print. Once you select the letter, the system prompts you to enter the signature and title that should print on the letter. Your letter must contain merge fields for the sender's name (\SG) and title (\TI) on the signature line, or the system will not pull the information you enter.
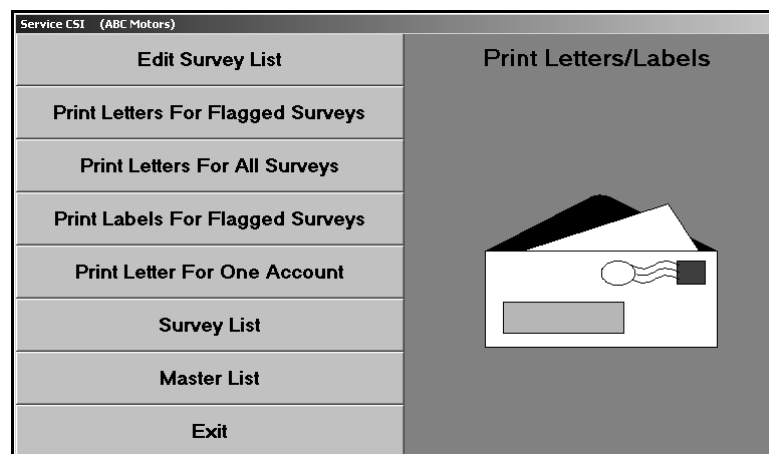
Edit Survey List

Use this button to open the Edit Compiled List screen to determine which customers should receive letters. Once you update the completed surveys, this screen displays only the customers you flagged to receive a letter. If you do not update the surveys, the screen lists all of the customers on the active survey list.

1. Click **Edit Survey List**. The Edit Compiled List screen appears.

2. The right side of the screen displays the phone survey list and indicates the letter status for each customer. If you entered an "L" for send letter on the survey screen, the customer's status reads, "Letter."

3. The information for the first customer on the list automatically fills in on the screen. You can also select individual customers by entering the repair order number or by clicking the customer in the list. The screen displays the selected customer's information.

4. Verify the customer's information. You can edit a customer's information on this screen, but the changes will not update to the customer's master file. The edits only affect how the information prints on the mailers. If you need to permanently edit the information, you must edit it in the customer's master file.

5. Verify a name appears in the **Salutation** field. Type a name if one does not fill in this field. If this field is blank, no name will print for the customer name merge code (\CN) on the salutation line of the letter.

6. Click one of the three buttons that correspond to the action you want to take:

    •   Click **Send Letter** to flag the customer to receive a letter. If you select to flag the customer for a letter, the letter status next to the customer's name will read, "Letter."

    •   Click **No Letter** to flag the customer not to receive a letter. Customers you flag not to receive letters have a status of "No."

    •   Click **Remove From List** to remove the customer from the list.

7. As you click the buttons, the next customer's information automatically fills in on the screen. Continue work your way through the list. The system will prompt you with a "That's All" message when you have finished editing the entire list. Click **OK** to acknowledge the message.

Print Letters For Flagged Surveys

Use this button to print letters for the customers you flagged to receive letters.

1. Click **Print Letters For Flagged Surveys**.

2. In **Starting With R/O**, type the repair order you want to use as the starting point for the print job. You can click the "Click Here For List" message to display a list of customers on the phone survey list. Click the customer you want to select. Letters will print for all of the flagged surveys from this customer on. If you want to print letters for all of the flagged surveys, leave this field blank, and press ENTER.

3. Type the letter number you want to send, or select the letter from the drop-down list.

4. If necessary, type the signature and title that should print on the letter, and press ENTER.

5. When prompted to verify your printer is ready, select your print criteria.

Print Letters For All Surveys

Use this button to print letters for all of the customers on the survey list.

1. Click **Print Letters For All Surveys**.

2. In **Starting With R/O**, type the repair order you want to use as the starting point for the print job. You can click the "Click Here For List" message to display a list of customers on the phone survey list. Click the customer you want to select. Letters will print for all of the customers from this customer on. If you want to print letters for all of the customers, leave this field blank, and press ENTER.

3. Type the letter number you want to send, or select the letter from the drop-down list.

4. If necessary, type the signature and title that should print on the letter, and press ENTER.

5. When prompted to verify your printer is ready, select your print criteria.

Print Labels For Flagged Surveys

Use this button to print mailing labels for customers with flagged surveys.

1. Click **Print Labels For Flagged Surveys**.

2. In **Starting With R/O**, type the repair order you want to use as the starting point for the print job. You can click the "Click Here For List" message to display a list of customers on the phone survey list. Click the customer you want to select. Labels will print for all of the flagged customers from this customer on. If you want to print labels for all of the selected customers, leave this field blank, and press ENTER.

3. When prompted to verify your printer is ready, select your print criteria.

Print Letter For One Account

Use this button to print a letter for a specified customer from the master customer database.

1. Click **Print Letter For One Account**.

2. In **Account Number**, type the account number for the customer you want to select. You can click the "Click Here For List" message to search for the customer in the database. Type the first three letters of the customer's last name. A list of the customers whose last name begins with those letters appears. Click the customer you want to select.

3. Type the letter number you want to send, or select the letter from the drop-down list.

4. If necessary, type the signature and title that should print on the letter, and press ENTER.

5. When prompted to verify your printer is ready, select your print criteria.

Survey List

Use this button to view the survey list. The same list opens when you click "Click Here For List" on the print prompts. The list displays the repair order number, last service date, customer's name, number of days since service, and survey status (active, aborted, send letter, etc.).

Master List

Use this button to search for a customer in the customer master files.

1. Click **Master List**. The Search Customer Base screen appears.

2. Type the first three letters of the customer's last name. A list of the customers whose last name begins with those letters appears. The list displays the account number, customer's name, and the vehicle's year, make, and model.

3. Click **Return** to close the search screen.

Performing the Monthly CSI Update

At the end of the month, use the **Monthly CSI Reports & Updates** button to print the monthly summary report and update the month-end data. You can print the month-to-date report any time during the month to check the statistics as needed. However, do not perform the monthly update until all of the surveys for the month are complete. This compiles all of the survey results for the month and updates the advisors' and technicians' statistics.
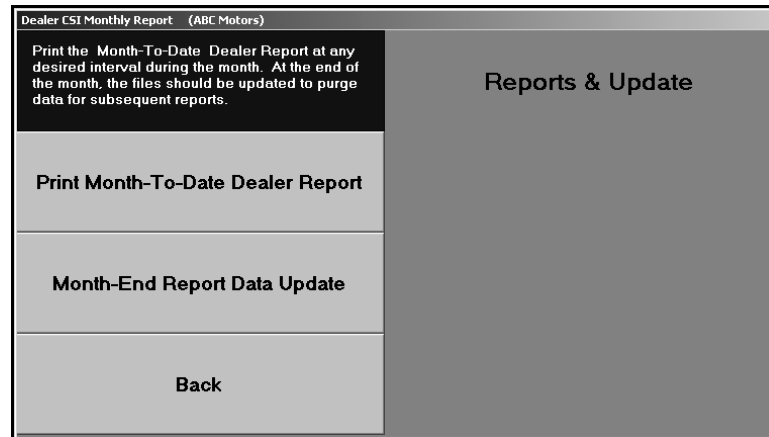
Print Month-To-Date Dealer Report

As you conduct surveys and complete the daily survey update, the system compiles the survey results and makes them available on this report.

1. Click **Print Month-To-Date Dealer Report**.

2. When prompted to verify your printer is ready, select your print criteria.

The first part of the report lists the repair orders for each advisor, and the second part of the report lists the repair orders for each technician. For each repair order, the report displays the repair order number, customer's name, service date, the vehicle's year, make, and model, the customer's phone numbers, the technician or advisor for the repair order, the ratings for each survey question, and the customer's comments. The report then displays the year-to-date monthly totals for each survey question for each advisor and technician. These are the same statistics available on the Advisor and Technician Information screens in the CSI/SSI setup.

The bottom part of the report provides a management summary. The first part displays the standard comments used on the surveys in order of frequency. The second part provides the total number of repair orders submitted, follow-ups completed, and red-eye customers. The third part of the management section breaks down the information for each month and provides the yearly totals. It identifies the total number of repair orders submitted and the overall rating percentage for each CSI survey question.

Month-End Report Data Update

Use this button to update the survey information for the month. Make sure you have all of the surveys completed that need to be completed. The update clears the individual repair order information from the Month-To-Date Dealer Report. Once you run the monthly update, you cannot view the list of customers who completed surveys for each advisor and technician. However, the system retains the monthly statistics for each advisor and technician.

1. Click **Month-End Report Data Update**.

2. Type the month you are updating.

3. Click **OK** when prompted to verify you want to update the information.

Chapter 3 SSI Follow-Up

The four middle buttons on the menu are for SSI follow-up. Like the CSI menu options, the SSI menu options are presented systematically. The order of activities for SSI is the same as CSI.

Pulling SSI Survey Data

SSI follow-up is similar to CSI follow-up. Click **Pull SSI Survey Data** to open the Compile SSI Survey List menu. You use this menu to compile the survey data. Once you compile the data, you use the remaining menu options to edit, print, and update the survey list.
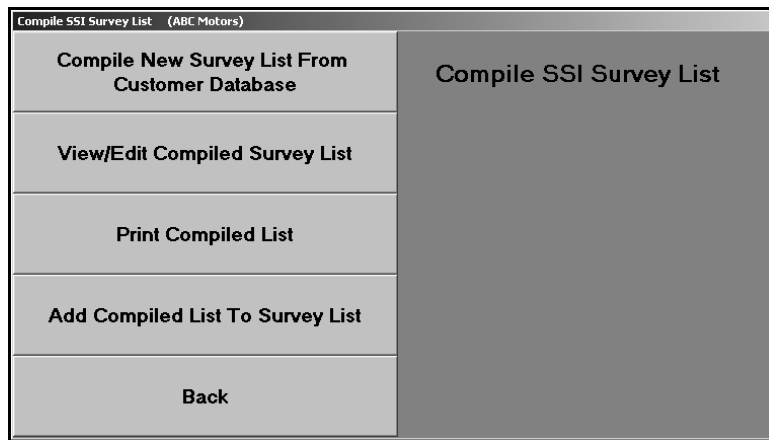
Compile New Survey List From Customer Data Base

The Compile SSI List From Customer Master File menu allows you to compile a survey list using the customer master file. You can select to compile the list based on vehicle type, car line, or salesperson. Only select one compiling option. If there is an existing list, the system overwrites it when you to compile another list. Based on the option you select and the criteria you enter, the system scans the customer master files and generates a list of customers.
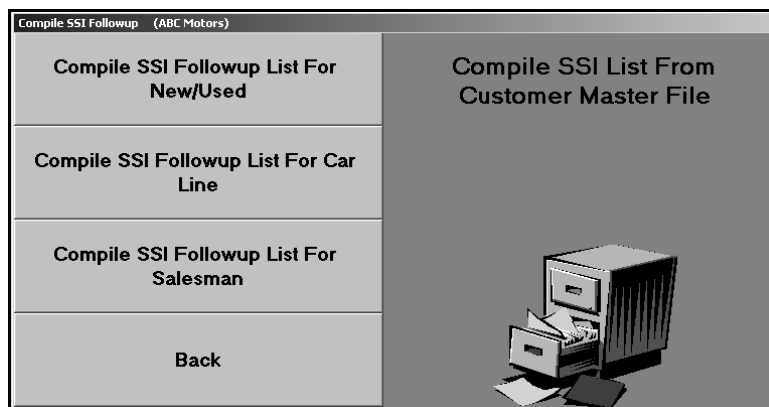
Compile SSI Followup List For New/Used

Use this button to compile the followup list based on a specific vehicle type.

1. Click **Compile SSI Followup List For New/Used**.

2. Indicate the vehicle type you want to use to generate the list. Type **N** for new, **U** for used, or **A** for all.

3. Type the inclusive dates you want to use. Enter the date in an eight-character format with or without slashes (mm/dd/yyyy or mmddyyyy). If you do not enter slashes, press ENTER to continue.

4. Click **OK** when prompted to verify you want to compile the list.

5. The system displays a "List Is Compiled" message when the list is ready. The prompt indicates the number of records on the list. Click **OK** to acknowledge the message.

Compile SSI Followup List For Car Line

Use this button to compile the followup list based on a specific car line.

1. Click **Compile SSI Followup List For Car Line**.

2. In **Car Line**, type the car line you want to use to generate the list, or select the car line from the drop-down list.

3. Type the inclusive dates you want to use. Enter the date in an eight-character format with or without slashes (mm/dd/yyyy or mmddyyyy). If you do not enter slashes, press ENTER to continue.

4. Click **OK** when prompted to verify you want to compile the list.

5. The system displays a "List Is Compiled" message when the list is ready. The prompt indicates the number of records on the list. Click **OK** to acknowledge the message.

Compile SSI Followup List For Salesman

Use this button to compile the followup list based on a specific salesperson.

1. Click **Compile SSI Followup List For Salesman**.

2. In **Salesman Number**, type the salesperson's ID number, or select the salesperson from the drop-down list.

3. Type the inclusive dates you want to use to generate the list. Enter the date in an eight-character format with or without slashes (mm/dd/yyyy or mmddyyyy). If you do not enter slashes, press ENTER to continue.

4. Click **OK** when prompted to verify you want to compile the list.

5. The system displays a "List Is Compiled" message when the list is ready. The prompt indicates the number of records on the list. Click **OK** to acknowledge the message.

View/Edit Compiled Survey List

After you compile the data, use this button on the Compile SSI Survey List menu to view and edit the compiled list. You can remove customers from the list by changing their status.

1. Click **View/Edit Compiled Survey List**. The Edit Compiled List screen appears and displays the customers on the compiled survey list.

2. Click **Prev** and **Next** to advance through the pages of the list, or click **All** to view all of the customers on the list.

3. Click customers to change their status from "Active" to "Remove" or from "Remove" to "Active." The system only pulls "Active" customers to the survey list.

4. When you are finished editing the list, click **Back**.

Print Compiled List

Use this button to print the compiled list. For each sale on the survey list, the printout lists the customer's account number and name, the vehicle's model year, model name, and make, and the sale date.

1. Click **Print Compiled List**.

2. When prompted to verify your printer is ready, click to select **To Printer** to print the information or **To Screen** to view the information on your screen.

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

Add Compiled List To Survey List

Use this button to add the edited compiled list to the survey list.

1. Click **Add Compiled List To Survey List**.

2. When prompted, type a description for the list. The heading prints on the top of the list when you print it. You can enter up to 50 characters.

3. Click **OK** when prompted to verify you want to add the list.

Conducting SSI Surveys

Once you have your SSI survey list, you conduct your surveys. Click **Conduct SSI Phone Survey** to open the Conduct SSI Phone Survey menu. The options on this menu allow you to conduct phone surveys and enter the responses for mailed surveys. Once you finish the surveys, you print the daily summary and update the surveys.
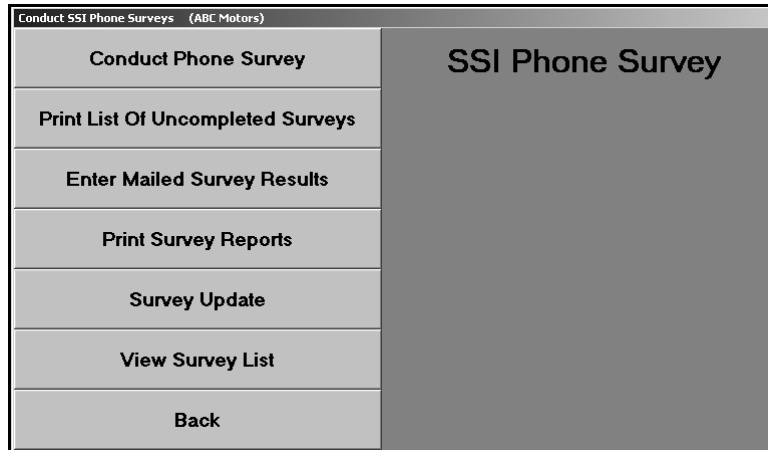
Removing "Customers" from the Survey List

The survey list may include dealer trades and wholesale sales. Use the following instructions to remove dealer trades or wholesale sales from the phone survey list once you have compiled it and pulled it to the active survey list.

1. Return to the CSI/SSI menu.

2. Click **Print SSI Letters & Labels**.

3. Click **Edit Compiled List**.

4. Click the record you want to remove from the survey list in the list window on the right side of the screen.

5. Click **Remove**.

6. Repeat steps 4 and 5 for each record you want to remove from the list.

7. Click **Back** to close the screen.

8. Click **Exit** to return to the CSI/SSI main menu.

9. Click **Conduct SSI Phone Survey**.

Conduct Phone Survey

Use this button to open the SSI Phone Survey screen to conduct phone surveys. The screen displays all of the SSI survey questions you entered in the SSI setup, so all you have to do is follow the questions on the screen and record the customer's response.

1. Click **Conduct Phone Survey**. The SSI Phone Survey screen appears.

2. Type the customer number, or click **List** to select the customer from the survey list. Click the customer you want to select. You can also click the arrow buttons on each side of the **List** button to scroll through the list.

3. The top of the screen displays the customer's name, address, and phone numbers, as well as the number of times the dealership has attempted to contact the customer. The bottom part of the screen displays the customer's name and a brief introduction for the phone call. The information includes the make of the vehicle the customer purchased.

4. At this point, you have two options depending on the scenario.

The Customer is Interested in Participating in the Survey

a. Click **Next**.

b. The next screen displays questions about the customer's satisfaction with the purchased vehicle and satisfaction with your dealership. Read each question, and type the rating number. You can also click to select the appropriate rating. (The first column is for rating 1, the second for rating 2, etc.)

The first question is a standard question about the customer's satisfaction with the vehicle. Use the **Comment** field below this question to enter the customer's comment about the satisfaction with the vehicle. This field holds up to 60 characters. This is an optional entry.

The next four questions relate to the customer's satisfaction with your dealership. The letters corresponds to the questions you entered under **Dealership Performance** on the SSI Phone Survey screen in the System Setup.

c. When you have asked all of the questions, click **Next**.

d. The next screen displays questions about the customer's satisfaction with the salesperson. The letters corresponds to the questions you entered under **Salesman Performance** on the SSI Phone Survey screen in the System Setup. Read each question, and type the rating number. You can also click to select the appropriate rating.

e. When you have asked all of the questions, click **Next**.

f. The final screen allows you to enter customer comments. You can enter up to two comments. Each field holds up to 60 characters. Remember, comments are not required entries, and you do not want to record every comment verbatim. Instead, you want to summarize the general idea. In reality, you will not be tracking individual comments to follow up on each one. Instead, comments serve mostly as a way for the person conducting the surveys to pick up on reoccurring issues that need to be addressed immediately.

g. When you are finished, click **Finish**. The system will mark the survey as "Completed" and return you to the initial SSI Phone Survey screen.

h. The SSI Phone Survey screen automatically displays the information for the next customer in the list. Continue to conduct surveys.

The Customer is not Home or not Interested in Participating in the Survey

a. Type the appropriate letter in the field at the bottom of the screen.

Type **A** to abort the survey. Using "A" for abort ensures the system tracks the number of times you attempt to contact the customer.

Type **L** to flag the customer to receive a letter.

Type **C** to mark the survey as completed.

b. The customer's status in the phone list will display the selection.

Print List Of Uncompleted Surveys

Use this button to print a list of the surveys that need to be completed. The report lists the salesperson's ID number, customer's name, city where the customer lives, and the vehicle's make and model. The bottom of the report identifies the total number of uncompleted reports.

1. Click **Print List Uncompleted Surveys**.

2. When prompted to verify your printer is ready, select your print criteria.

Enter Mailed Survey Results

Use this button to open the Enter Mail-In Surveys screen to enter the results of surveys you mailed to customers.
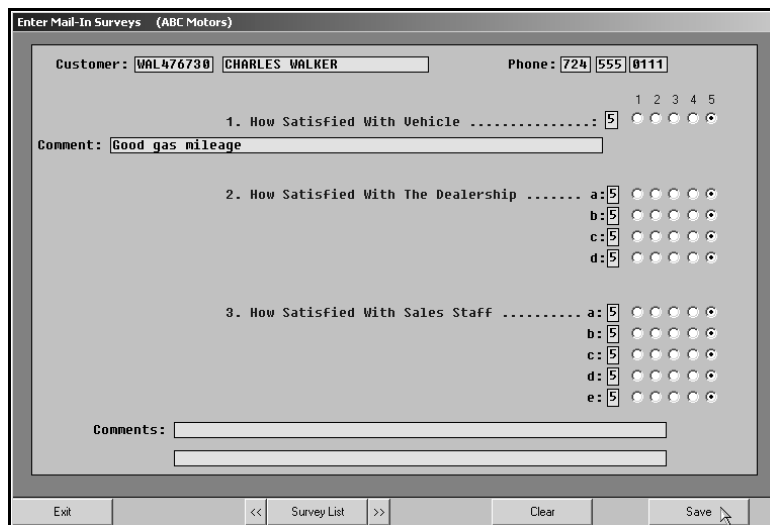
1. Click **Enter Mailed Survey Results**. The Enter Mail-In Surveys screen appears.

2. Type the customer number, or click **Survey List** to select the customer from the survey list. Click the customer you want to select. You can also click the arrow buttons on each side of the **Survey List** button to scroll through the list.

3. The top of the screen displays the customer's name and phone number.

4. The next part of the screen displays the SSI survey questions. Type the rating number, or click to select the appropriate rating.

    Question 1 is a standard question about the customer's satisfaction with the vehicle. Use the **Comment** field below this question to enter the customer's comment about the satisfaction with the vehicle.

    Question 2 relates to the customer's satisfaction with your dealership. The letters corresponds to the questions you entered under **Dealership Performance** on the SSI Phone Survey screen in the System Setup.

    Question 3 relates to the customer's satisfaction with the salesperson. The letters corresponds to the questions you entered under **Salesman Performance** on the SSI Phone Survey screen in the System Setup.

5. Next, type up to two customer comments. Each comment field holds up to 60 characters.

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

Print Survey Reports

Use this button to print the results of the surveys you conducted. The report displays each customer's ratings for each survey question. The end of the report displays the customer's overall satisfaction summary and total ratings based on the average of all of the surveys.

1. Click **Print Survey Reports**.

2. Type a heading for the report you are printing.

3. When prompted to verify your printer is ready, select your print criteria.

Survey Update

At the end of the day, use this button to update the survey information. This generates the survey statistics and updates them to the Dealership Information screen and to the salespeople's files in the System Setup. The update removes all completed surveys from the survey list. If you want to print letters for customers who completed the surveys, print the letters *before* you complete the daily update.

1. Click **Survey Update**.

2. Indicate if you want to hold the uncompleted surveys in the survey list or delete them. Type **Y** (for yes) to hold the surveys in the list or **N** (for no) to dump the surveys.

3. Click **OK** when prompted to verify you want to update the information.

View Survey List

Use this button to view the list of customers on the survey list. The list indicates which customers have completed the survey and which customers are still active and need to complete the survey.

Printing SSI Followup Letters

After you conduct the surveys, you print the followup letters as needed. Click **Print SSI Letters & Labels** to open the Print Letters menu. You use this menu to print SSI customer letters and mailing labels. When printing letters, you must specify the letter you want to print. Once you select the letter, the system prompts you to enter the signature and title that should print on the letter. Your letter must contain merge fields for the sender's name (\SG) and title (\TI for) on the signature line, or the system will not pull the information you enter.
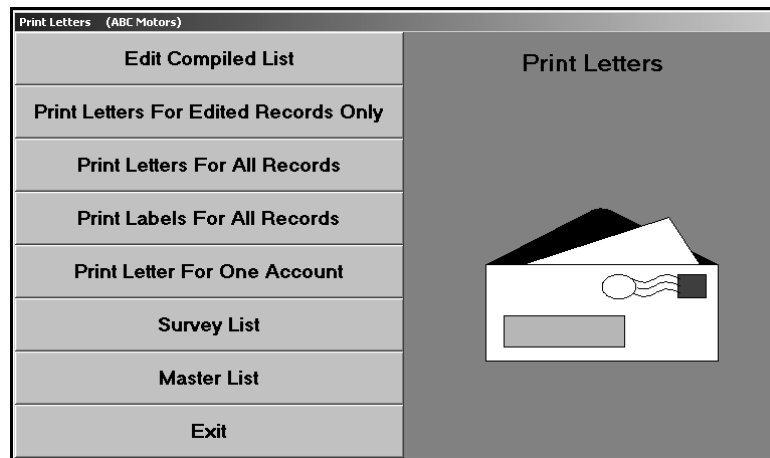
Edit Compiled List

First, use the Edit Compiled List screen to select which customers should receive letters. Once you update the completed surveys using the Update option on the SSI Phone Survey menu, this screen displays only the customers you flagged to receive a letter. If you do not update the surveys, the screen lists all of the customers on the active survey list.

1. Click **Edit Compiled List**. The Edit Compiled List screen appears.

2. The window on the right side of the screen displays the phone survey list and indicates the letter status for each customer. If you entered an "L" for Send Letter on the survey screen, the customer's status reads, "Y."

3. The information for the first customer on the list automatically fills in on the screen. You can also select individual customers by typing the repair order number, or by clicking the customer in the list on the right side of the screen. The screen displays the selected customer's information.

4. Verify the customer's information. You can edit a customer's information on this screen, but the changes will not update to the customer's master file. The edits only affect how the information prints on the mailers. If you need to permanently edit the information, you must edit it in the customer's master file.

5. Verify a name appears in the **Salutation** field. Type a name if one does not fill in this field. If this field is blank, no name will print for the customer name merge code (\CN) on the salutation line of the letter.

6. Click one of the three buttons that correspond to the action you want to take:

   - Click **Send Letter** to flag the customer to receive a letter. If you select to flag the customer for a letter, the letter status next to the customer's name will read, "Letter."

   - Click **No Letter** to flag the customer not to receive a letter. Customers flagged not to receive letters have a status of "No."

   - Click **Remove From List** to remove the customer from the list.

7. As you click the buttons, the next customer's information automatically fills in on the screen. Continue work your way through the list.

8. The system will prompt you with a "That's All" message when you have finished editing the entire list. Click **OK** to acknowledge the message.

9. Click **Back** to close the screen.

Print Letters For Edited Records Only

Use this button to print letters for the customers you want to receive letters.

1. Click **Print Letters For Edited Records Only**.

2. In **Starting With Account**, type the account number you want to use as the starting point for the print job. You can click the "Click Here For List" message to display a list of customers on the survey list. Click the customer you want to select. Letters will print for all of the flagged customers from this customer on. If you want to print letters for all of the selected customers, leave this field blank, and press ENTER.

3. Type the letter number you want to send, or select the letter from the drop-down list.

4. If necessary, type the signature and title that should print on the letter, and press ENTER to continue.

5. When prompted to verify your printer is ready, select your print criteria.

Print Letters For All Records

Use this button to print letters for all of the customers on the survey list.

1. Click **Print Letters For All Records**.

2. In **Starting With Account**, type the account number you want to use as the starting point for the print job. You can click the "Click Here For List" message to display a list of customers on the survey list. Click the customer you want to select. Letters will print for all of the customers from this customer on. If you want to print letters for all of the customers, leave this field blank, and press ENTER.

3. Type the letter number you want to send, or select the letter from the drop-down list.

4. If necessary, type the signature and title that should print on the letter, and press ENTER to continue.

5. When prompted to verify your printer is ready, select your print criteria.

Print Labels For All Records

Use this button to print labels for all of the customers on the survey list.

1. Click **Print Labels For All Records**.

2. In **Starting With Account**, type the account number you want to use as the starting point for the print job. You can click the "Click Here For List" message to display a list of customers on the survey list. Click the customer you want to select. Labels will print for all of the customers from this customer on. If you want to print labels for all of the selected customers, leave this field blank, and press ENTER.

3. When prompted to verify your printer is ready, select your print criteria.

Print Letter For One Account

Use this button to print a letter for a specified customer.

1. Click **Print Letter For One Account**.

2. In **Account Number**, type the account number you want to use as the starting point for the print job. You can click the "Click Here For List" message to display a list of customers on the survey list. Click the customer you want to select.

3. Type the letter number you want to send, or select the letter from the drop-down list.

4. If necessary, type the signature and title that should print on the letter, and press ENTER to continue.

5. When prompted to verify your printer is ready, select your print criteria.

Survey List

Use this button to view the survey list. The same list opens when you click "Click Here For List" on the print prompts. The list displays the account number, customer's name, and the vehicle's year, make, and model. To view a specific customer on the list, type the first three letters of the customer's name. A list of the customers on the list whose last name begins with those letters appears. (You can click **Master List** to search for a customer in the master list.)

Master List

Use this button to display the Search Customer Base screen to search for a customer in the master list. You can select a customer from the list and print a letter for the customer.

1. Click **Master List**. The Search Customer Base screen appears.

2. Type the first three letters of the customer's last name.

3. A list of the customers whose last name begins with those letters appears. The list displays the account number, customer's name, and the vehicle's year, make, and model.

4. To print a letter for the customer, click the customer.

5. Type the letter number you want to send, or select the letter from the drop-down list.

6. If necessary, type the signature and title that should print on the letter, and press ENTER to continue.

7. Click **OK** when prompted to verify your printer is ready.

Performing the Monthly SSI Update

At the end of the month, use the **SSI Reports & Updates** button to print the batch SSI report and to update the survey results for the month. You can print the month-to-date report any time during the month to check the statistics as needed. However, do not perform the monthly update (option 2) until all of the surveys for the month are complete. The update compiles all of the survey results for the month and updates the statistics to the Dealer Information screen in the System Setup.

Print Batch SSI Dealer Report

As you conduct surveys and complete the daily survey update, the system compiles the survey results and makes them available on this report. Click this button when you want to print the summary of the SSI surveys. You can print this report any time during the month. The report has three sections.

The first part of the report displays each customer's satisfaction ratings for each salesperson. In addition to listing the customer rating for each sales question on the survey, the report displays the customer's name, the delivery date for the vehicle, and the purchased vehicle's make and model year. The bottom part of each salesperson's section will display the salesperson's monthly and year-to-date percentage rating for each sales question on the survey.

The next part of the report serves as a management summary. It displays each customer's satisfaction ratings for each salesperson and the dealership. In addition to listing the customer rating for each sales and dealership question on the survey, the report displays the customer's name, the delivery date for the vehicle, and the purchased vehicle's make and model year. The bottom part of each salesperson's section will display the salesperson's monthly and year-to-date percentage rating for each sales question on the survey.

The final part of the report displays monthly and overall percentage ratings for each question on the survey.

1. Click **Print Batch SSI Dealer Report**.

2. In the Survey Description field, type a heading for the report. The heading prints on the top of the printout. Press TAB or ENTER to continue.

3. When prompted to verify your printer is ready, select your print criteria.

Update Batch Data

Use this button to update the survey information for the month. Only update the data after you have completed all of the surveys for the month. The update clears the individual survey information from the Batch SSI Dealer Report. Once you run the monthly update, you cannot view the list of customers who completed surveys. However, the system retains the monthly statistics for vehicles, salespeople, and the dealership.

1. Click **Update Batch Data**.

2. Type the month you are updating.

3. Click **OK** when prompted to verify you want to update the information.

Autosoft Dealer Management System™

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 [icon] 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.

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.

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.
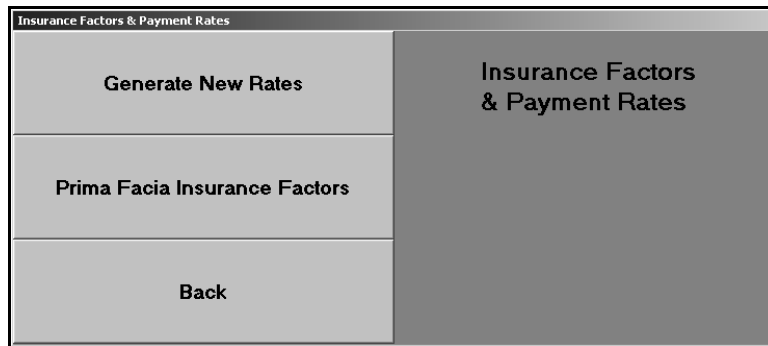
Generate New Rates

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.

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.

```
Reactor Text

    Reactor Number: 0
    Retail Factory Discount ...............   $ _____

    Retail Consumer Rebate ................   $ _____

    Total Discounts On This Vehicle .......   $ _____


    Enter Down Payment ....................   $ _____
    (Local Banks May Require 1/3 Down)


    Blue Book or N.A.D.A. Estimate For Trade  $ _____



    Desired Monthly Payment With Cash Down .. $ _____




              Back                                    Save
```

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 will 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**.

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.

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.

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.
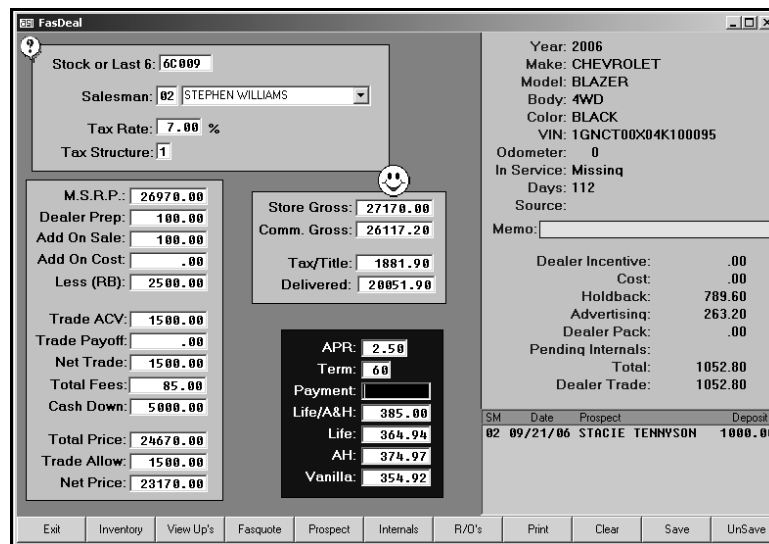
1. Click **'Get Ready' Text**.

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.

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.

Field	Information it requires/displays
Stock or Last 6	Type the vehicle's stock number or the last six digits of the VIN. The vehicle's information fills in on the screen.
Salesman	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.
Tax Rate	This field fills in with the tax rate percentage entered under Standard Fees/Parameters in the setup.
Tax Structure	This field fills in with the number for the tax rate structure set as the default under Standard Fees/Parameters in the setup.
M.S.R.P.	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.
Dealer Prep	This field displays the dealer prep amount. This value pulls from the vehicle information entered in the system.
Add On Sale	Type any additional sale amount.
Add On Cost	Type any additional cost amount.
Less (RB)	Type the rebate amount.
Trade ACV	If there is a trade, type the actual cash value of the trade.
Trade Payoff	Type the amount the customer still owes on the trade vehicle.
Net Trade	This field displays the net trade amount. This is the trade ACV minus the trade payoff.
Total Fees	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.
Cash Down	Type the amount the customer is putting down on the vehicle.
Total Price	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
Trade Allow	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.
Net Price	This field displays the net price for the vehicle. The system calculates this by subtracting the trade allowance from the total price.
Store Gross	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.

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. |
Comm. Gross	This field displays the total commissionable gross. The system calculates this value by subtracting the holdback and dealer prep from the store gross.
Tax/Title	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 **Tax Rate** field to calculate the sales tax on the net price.
Delivered	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.
APR	Type the annual percentage rate for the customer's financing.
Term	Type the number of months the customer is financing the vehicle.
Payment	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.
Life/A&H	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.
Life	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.
AH	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.
Vanilla	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.
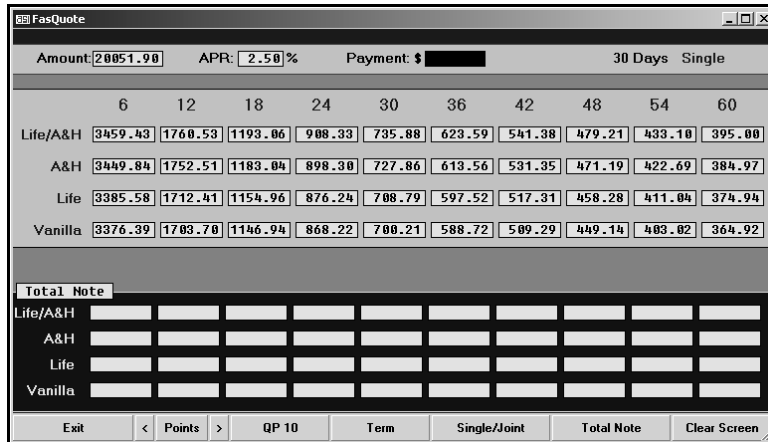
Deleting a FasDeal

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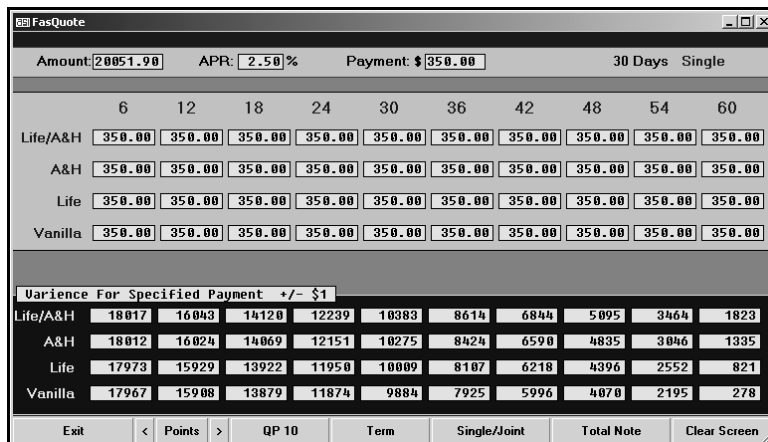
The FasQuote allows you to quickly calculate payments. Once you specify the finance amount and annual percentage rate, the system automatically displays the customer's payment (with or without Life and A&H). You can view payments for financing from 6 to 180 months. The FasQuote feature only works if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

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.

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 though 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.
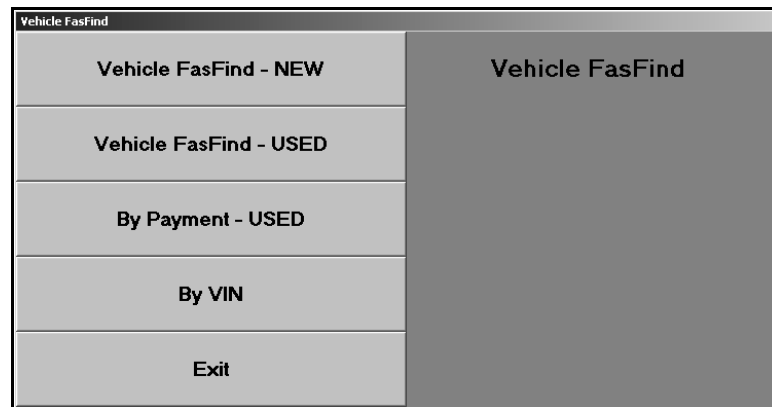
Vehicle FasFind—New

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.

Salesman Ups	
View UP's	**Salesman Ups**
Print UP's Worksheet For Salesman	
Print List Of All UP's	
Print Potential Trades & Instock Hits	
Purge UP's For Salesman	
Purge All SOLD FasDeal Up's	
Purge ALL FasDeal Up's	
Exit	
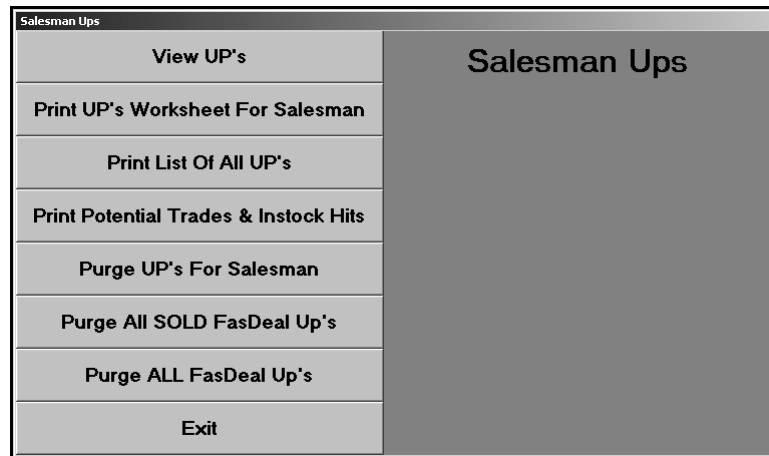
View Up's

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 mmddyyyy).

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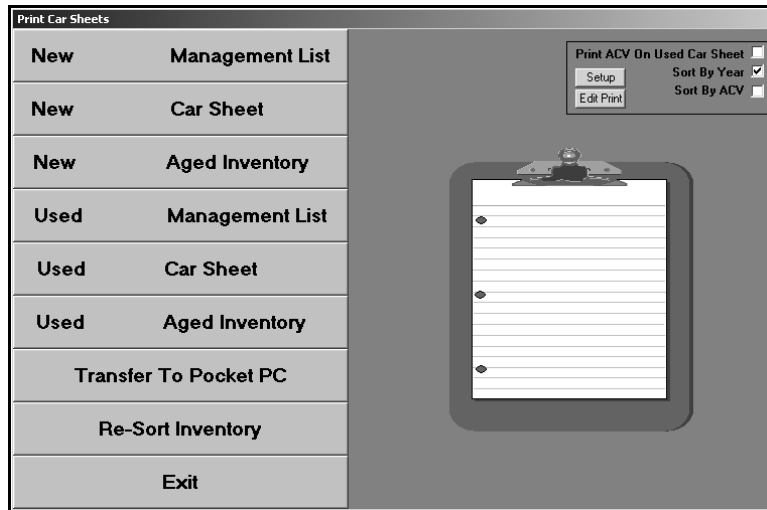
Tip: Some dealers use the Autosoft Report Generator to create a customized Inventory report.	

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**.

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**.
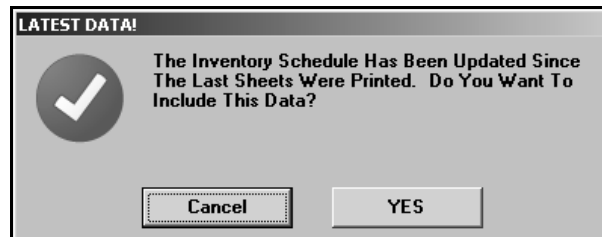
Printing the Car Sheets

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.

Sales	
View Vehicle Sales	Vehicle Sales
Print Vehicle Sales Summary	
Vehicle Sales FaStats	
Vehicles By Salesman	
Vehicles By Stock Number	
Sales Reports	
Exit	

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.
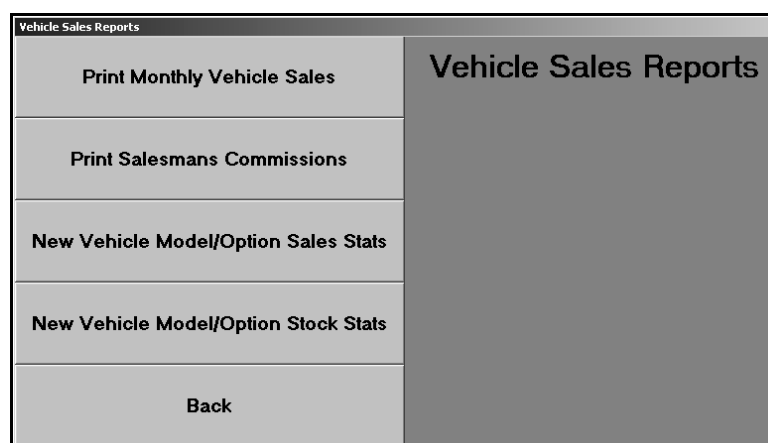
Print Monthly Vehicle Sales

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 mmddyyyy). 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.

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.
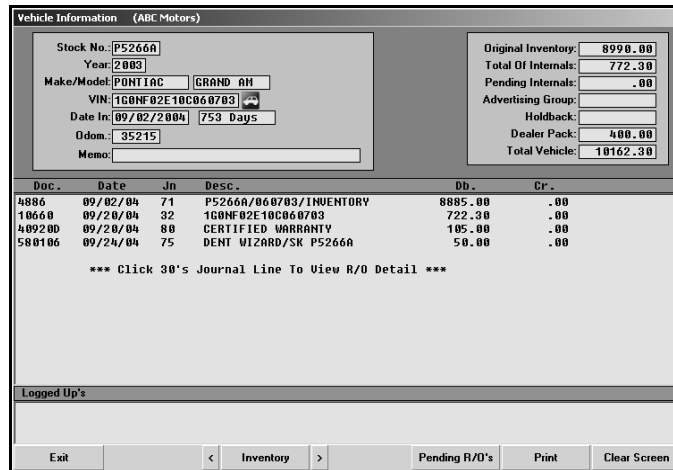
Deleting Commission

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.

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.

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.

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

8. 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.)

9. Click **Close** to close the View Internals screen.

10. Select another car line as needed.

11. Use the **Print** button to print the selected list of vehicles as needed.

12. 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.

> **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.

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

Field	Information it displays
Customer (Incentives)	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.
Dealer (Incentives)	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.
Options	These fields display the options on the vehicle. You can enter up to 10 options.
M.S.R.P.	This field displays the manufacturer's suggested retail price. This is also referred to as the asking price.
Dealer Prep	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.
Dealer Pack	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.
Invoice	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.
Holdback	This field displays the total value of the holdback.
Advertising	This field displays the total value of advertising.
Pending Repairs	This field displays the total value of any pending repairs.
ACV	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.
Original	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.
Internals	This field displays the total value of the internals. You cannot edit this field.
Total Book	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®, AutoMallUSA.com®, and Microsoft® Carpoint®. The system downloads the information to a 3.5-inch floppy disk.

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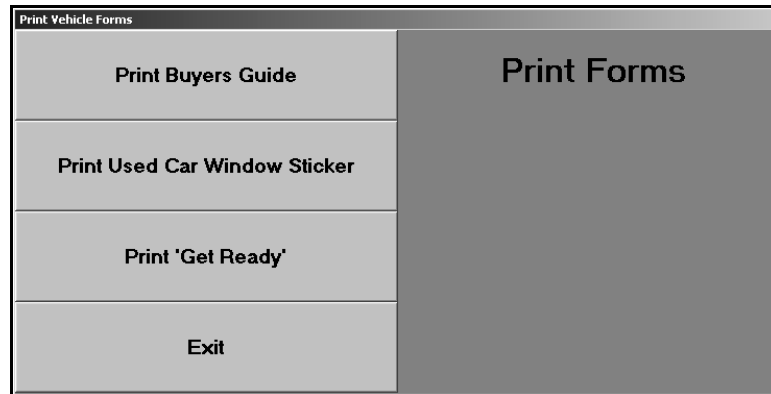
Tip: You can only print buyers guides on laser printers in Autosoft FLEX DMS version 6.6. If you use the Autosoft Finance Assistant program, you can print the buyers guides using the F&I printer.

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.

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.

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.
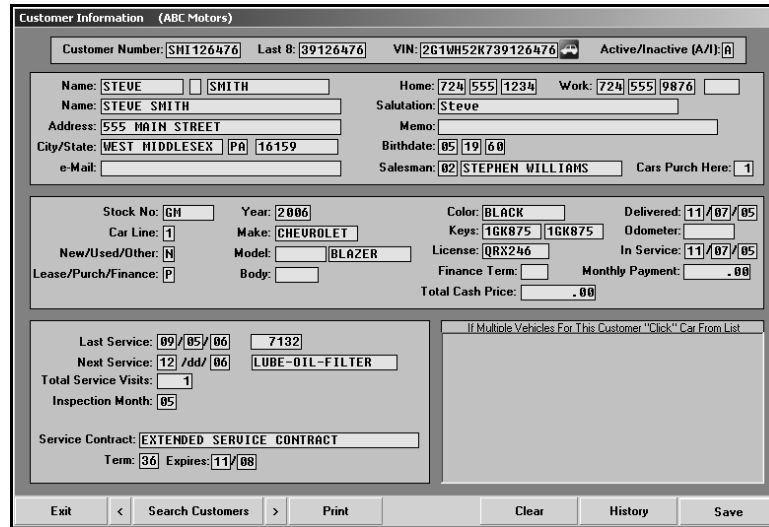
Printing Options

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.

Chapter 18 Showroom Traffic Overview and Setup

You use the Showroom Traffic module to track your showroom traffic and prospective sales. The menu options allow you to enter prospective customers and to report on the progress of the sale. You can print reminder lists, followup letters, and activity reports. Showroom traffic does not pull or include UP's saved with a FasDeal in Desk Manager. UP's are not the same as prospects. Prospects are at the early stages of purchasing the vehicle, so the salesperson may not have discussed pricing yet. With UP's, the salesperson has discussed money, agreed on a figure, and added the figure to the FasDeal screen in Desk Manager.

Selecting Print Criteria

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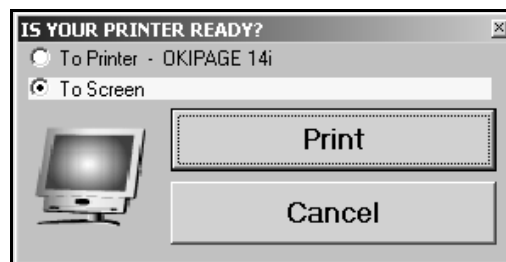
Printing to screen allows you to preview the information before printing it to paper, which may be useful when printing customer letters. If you select to print the information to your screen, you can print the report from the viewing screen by clicking **File** and **Print**. To exit the viewing screen,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

System Setup & Updates

First, use the System Setup & Update menu to enter default information the system will use throughout the Showroom Traffic module. Once you begin using the program, you will use the last option on this menu to update the working files at the end of the month. Work your way through each option on the setup menu. Once you are finished entering the setup parameters, click **Back** to return to the Showroom traffic menu.

Salesman Information

This button opens the Salesman Information screen. You use this 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.

Adding a Salesperson

1. Click **Salesman Information**. The Salesman Information screen appears.

2. Assign the salesperson a two-digit code. This serves as an ID number for the salesperson.

3. Type the Salesperson's name and phone number.

4. Type the salesperson's closing ratio goal. This is the salesperson's target sales percentage. This is an optional entry.

5. If you want to use passwords for the Traffic module, type the password you want to set for this salesperson. The salesperson will be required to enter the salesperson ID and password in order to access the Traffic module. The password can be up to five alphanumeric characters.

6. Click **Save**. The salesperson is added to the list window on the right side of the screen.

Viewing a Salesperson's Information

1. Type the salesperson's code, or click the salesperson in the list on the right side of the screen.

2. The salesperson's information fills in on the screen. Once you begin entering sales into the system, the bottom part of the screen displays the salesperson's sales statistics for the current month and year.

3. To edit information, click in a field, and edit the information as needed. Click **Save** to save the changes you make.

Deleting a Salesperson

Deleting the salesperson here also deletes the salesperson from the Accounting, CSI/SSI, and Desk Manager modules.

1. Select the salesperson.

2. Click **Delete**.

3. Click **OK** when prompted to verify you want to delete the record.

Printing the Sales List

The print button allows you to print a list of salespeople. The printout lists each salesperson and the salesperson's phone number.

1. Click **Print**.

2. When prompted to verify your printer is ready, select your print criteria.

Customer Sources

You use the Customer Sources screen to enter up to 35 sources that identify how customers heard about your dealership. When you enter prospective customers, you assign each a source code. This screen tracks and displays the number of customers that came into the dealerships each month and for the year due to each source. In addition, the list on the right side of the screen will keep a running count of the number of customers that came in for each source. You can print a traffic report based on sources and use the reports to help your dealership make marketing decisions.

Adding a Source

1. Click **Customer Sources**. The Customer Sources screen appears.

2. Assign the source an ID from 1 to 9 or A to Z.

3. Type a description for the source.

4. Click **Save**. The source is added to the list window on the right side of the screen.

Viewing a Source's Usage

Once you begin entering sales into the system, the bottom part of the screen displays the number of times the source has been used each month and for the current year.

1. Type the source ID, or click the source in the list on the right side of the screen.

2. The monthly totals fill in on the screen. Click **Print** to print the statistics for all of the sources.

Deleting a Source

1. Select the source.

2. Click **Delete**.

3. Click **OK** when prompted to verify you want to delete the record.

Miscellaneous Parameters

You use this screen to enter parameters for three areas of the program.

1. Click **Miscellaneous Parameters**. The Miscellaneous Parameters screen appears.

2. Under **Result Descriptions**, type descriptions of results the salespeople can use to explain the outcome of a prospective sale. "Sold" is hard coded as the first result. You cannot edit this field. However, you can edit the remaining eight fields. Each description can be up to 15 characters. These results are available on the Enter Results screen.

3. Under **Action Descriptions**, type up to six descriptions for actions the salespeople need to take with prospects. These descriptions appear on the Enter Prospect screen and allow the salespeople to track their progress with a prospect. The system comes with preset descriptions, but you can edit the fields as needed.

4. Next, indicate the dealership's target closing ratio percentage. This is the dealership's target sales percentage. The system uses this figure to generate sales reports.

5. Finally, specify how long to keep prospect files in the system. You can select to hold the files from one to five months. After the specified time, the system deletes the records during the monthly update. The System Setup & Updates menu displays the number of months you specify for your reference.

6. Click **Save** to save the information. The system returns you to the System Setup & Updates menu.

You can return to this screen and edit the information as needed. Simply click in a field, and edit the information as needed. Make sure you click **Save** to save the changes. Clicking **Back** closes the screen but does not save the information.

Enter Daily Worksheet Text

Use this button to open the Daily Worksheet screen to create worksheets the salespeople can use to aid them with their daily tasks. Once you enter the information, use the Print Traffic Reminders & Daily Worksheets menu to print the daily worksheets.

1. Click **Enter Daily Worksheet Text**.

2. Type the text you want to add to the worksheet on each line. You can enter up to 20 lines of text, and each line hold 70 characters.

3. As you type, **_You must press ENTER_** to force line breaks as you type instead of allowing the text auto-wrapping feature to move the text to the next line. Pressing ENTER to break the lines ensures your text will print properly.

4. Click **Save**. The system returns you to the System Setup & Updates menu.

You can return to this screen and edit the information as needed. Simply click in a field, and edit the information as needed. Make sure you click **Save** to save the changes. Clicking **Back** closes the screen but does not save the information.
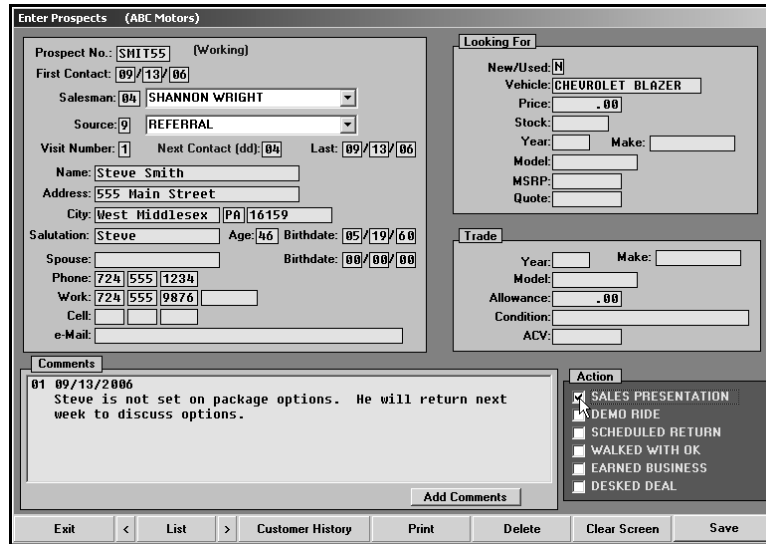
Compose/Edit Letters

You compose letters in the Showroom Traffic module the same way you do in the CSI & SSI module. Remember, all letters you create in CSI/SSI, Showroom Traffic, and Marketing are available in a common letter database. See "Creating a New Letter" on page 16 for instructions on creating letters.

Once the setup is complete, you can begin entering prospects.

Chapter 19 Enter Prospects

When prospects come to the dealerships, you create a prospect file for them using the **Enter Prospects** button. You record the customer's information, information about the vehicle the customer looked at, and information about the customer's potential trade-in vehicle. You also indicate the actions you took with the customer.

Entering a New Prospect

1. Click **Enter Prospects**. The Enter Prospects screen appears.

2. Assign the prospect a prospect number. This field accepts alpha and numeric characters. You should assign prospect numbers following your dealership's standard system for assigning customer numbers.

3. The **First Contact** date defaults to the system date. Edit the date as needed. This should be the date the prospect first came into the dealership.

4. In **Salesman**, type the code for the salesperson the prospect is working with, or select the salesperson from the drop-down list.

5. In **Source**, type the code for the source that brought the customer to the dealership, or select the source from the drop-down list. You entered the sources using the Customer Sources option on the System Setup & Updates menu.

6. The **Visit Number** defaults to 1. As the customer comes into the dealership, you should increment this value.

7. In **Next Contact**, indicate the number of days you want to pass before you contact the prospect. This field is used when printing the reminder lists. This is a required field. You must enter and save a numeric value in this field to prevent the system from automatically deleting the prospect during the End-Of-Month Update run from the System Setup & Updates menu. The update needs to be performed at the end of the month to ensure your statistical analysis is current.

8. The **Last** field defaults to the system date. As you work with the customer, edit this date to ensure you always have a record of the last time you made contact with the prospect.

9. Type the prospect's name, address, and phone number. This information is used to print letters and mailing labels and will print exactly as it appears in these fields.

10. Use the **Salutation** line to specify the name that should print on the salutation line of the customer letters. This is an important field. If you do not enter a name, no name prints on the letter. The salutation will print on the letter exactly as it appears in this field.

11. Fill in the customer's age and birth date if available. If you do not know the customer's age, you can enter an approximate age. Since customers may not provide a birth date or since your dealership may not collect this information, the **Age** field is *not* connected to the **birthdate** field, so the customer's age will not automatically calculate or update.

12. In **Spouse**, type the name of the customer's spouse, and enter the spouse's birth date in the **Birthdate** field if this information is available.

13. Next, fill in the customer's home phone number, work phone number, and cellular phone number.

14. Type the customer's e-mail address in the **e-Mail** field.

13. Under **Looking For**, type the information for the vehicle the prospect wants. Indicate if it is new (N) or used (U). Type a description of the vehicle the prospect wants. If the prospect looked at a specific car in your stock, enter the stock number, and the model year, make, and model name automatically fill in the fields. Enter the price and quoted price for the vehicle. These are not required fields, but this information will provide additional data on the follow-up worksheets.

14. Under **Trade**, type the information for potential trade-in vehicle. Enter the model year, make, model name, cash allowance, vehicle's condition, and vehicle's actual cash value. These are not required fields, but this information will provide additional data on the follow-up worksheets.

15. Use the **Comments** section to record notes about the prospect. Click **Add Comment**, and type your comment in the box that appears. Click **Close** to save the comment. The system automatically dates and numbers the comments as you enter them. Each comment can be up to 300 characters.

16. Use the **Action** section to indicate the actions taken with the prospect. You entered the action descriptions using the Miscellaneous Parameters option on the System Setup & Updates menu. Click in a box to select it. A checkmark appears in the field. Click in a box again to clear it.

17. When you are finished entering information, click **Save** to save the prospect's record.

Editing Prospect's Information

1. Type the prospect number, or click **List** to select the prospect from a list of prospects. Use the buttons on the bottom of the list screen to filter and sort the list. You can select to view all prospects, prospects for the current month, or prospects for last month. You can also choose to sort the list based on the last contact date.

2. The prospect's information fills in on the screen. You can scroll through the prospect list by clicking the arrows on each side of the **List** button.

3. Click in a field, and edit the information as needed.

4. To edit a comment, click **Add Comment**. Type the comment number in the Record field. Edit the text as needed, and click **Close** to save the changes.

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

Pulling a Prospect from Customer History

You can pull existing customers' information to a prospect file.

1. Click **Customer History**. The Customer Information screen appears.

2. Click **Search Customers**. A search screen appears.

3. Type the last four digits of the customer's phone number, first three letters of the customer's last name, or the license number.

4. The screen displays a list of customers who meet the criteria you entered. Click the customer you want to select. The Customer Information screen displays the customer's information.

5. Click **Convert To Traffic**. The customer's information automatically fills in on the Enter Prospect screen. Enter or edit information on this screen as needed.

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

Printing the Prospect's Information

Use the **Print** button to print a prospect's information. The top part of the printout lists the prospect's information. The next part lists the first, last, and next contact dates, so it is easy to identify the prospect's activity. The last part of the printout lists the comments and the information for the potential sale and trade vehicles.

1. Select the prospect. The prospects information fills in on the Enter Prospects screen.

2. Click **Print**.

3. When prompted to verify your printer is ready, select your print criteria.

Deleting a Prospect

1. Select the prospect.

2. Click **Delete**.

3. Click **OK** when prompted to verify you want to delete the record.

Chapter 20 Prospect Follow-Up Letters

You use the Prospect-Up Letters menu to print followup letters and mailing labels. When printing letters, you must specify the letter you want to print. Once you select the letter, the system prompts you to enter the signature and title that should print on the letter. Your letter must contain merge fields for the sender's name (\SG) or salesperson's name (\SM) and title (\TI) on the signature line, or the system will not pull the information you enter. Remember, you have the option of printing the letter or viewing the letter on your screen. Viewing the letters on your screen allows you to preview the letter before printing the final copy.
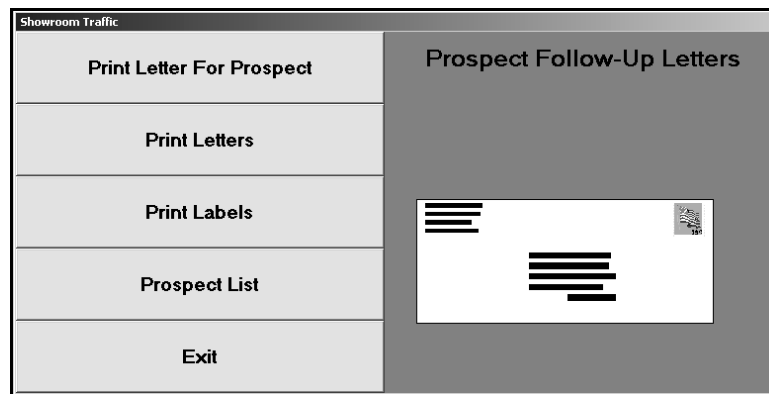
Print Letter For Prospect

Use this button to print a followup letter for a specific prospect.

1. Click **Print Letter For Prospect**.

2. Type the prospect number, or click the "Click for list" message to display a list of prospects. Click the prospect you want to select.

3. Type the letter number you want to print for the customer, or select the letter from the drop-down list.

4. The salesperson's name automatically fills in the signature field. This is the salesperson entered on the Enter Prospect screen. If another name needs to print on the signature line, type the name in this field. Press ENTER to accept the name.

5. The **Title** field automatically defaults to "Your Salesman." Type the title you want to print on the letter. Press ENTER.

6. When prompted to verify your printer is ready, select your print criteria.

Print Letters

Use this button to print a letter for all the prospects that were entered into the system on a specific date.

1. Click **Print Letters**.

2. Type the date. 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.

3. Type the letter number you want to print for the customer, or select the letter from the drop-down list.

4. The salesperson's name automatically fills in the signature field. This is the salesperson entered on the Enter Prospect screen. If another name needs to print on the signature line, type the name in this field. Press ENTER to accept the name.

5. The **Title** field automatically defaults to "Your Salesman." Type the title you want to print on the letter. Press ENTER.

6. When prompted to verify your printer is ready, select your print criteria.

Print Labels

Use this button to print mailing labels for all the prospects that were entered into the system on a specific date.

1. Click **Print Labels**.

2. Type the date. 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.

3. When prompted to verify your printer is ready, select your print criteria.

> **Tip:** Although you can select to print to screen to preview the labels, only print the labels from Autosoft FLEX DMS. This ensures your labels will print properly.

Prospect List

Use this button to view a list of prospects. The list displays the prospect number, salesperson's number, prospect's name, and first visit date. The list also identifies if the prospect has been "sold," if the salesperson is still "working" with the prospect, or if the salesperson entered another result on the Enter Results screen for the prospect.

Chapter 21 Reminder Lists & Worksheets

This button advances you to the Print Traffic Reminders & Daily Work Sheets menu. This menu allows you to print various reminder lists and worksheets to use to follow up on prospective sales.
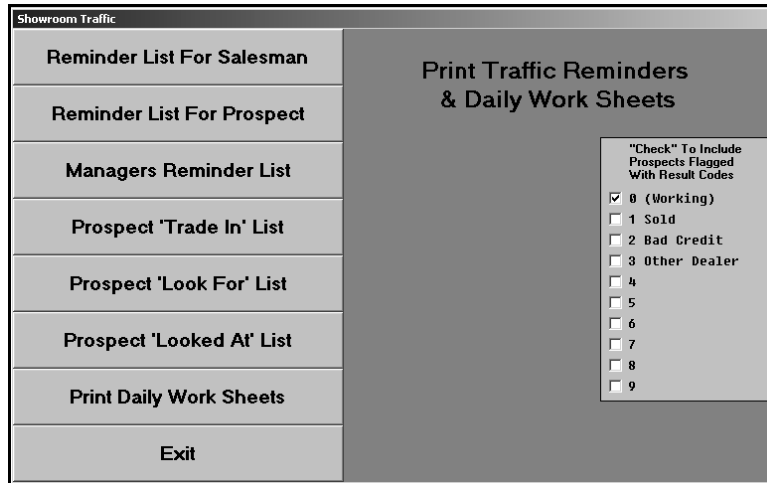
The right side of the menu allows you to specify the prospects you want to include when generating the lists. It lists the result codes you created in the system setup. Any prospect in the system is considered "working" until you select a different result on the Enter Results screen. Selecting the result codes to use provides even more flexibility when generating the lists and reminders.
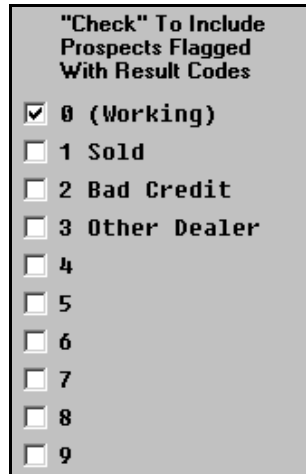
Click the box next to the code you want to select. A checkmark appears in the box to indicate you selected the code. Click the box again to clear the checkmark. You should verify this setup before you print any lists or reminder to ensure the correct prospect information prints.

Reminder List For Salesman

Use this button to print a reminder list for a salesperson. The reminder list displays the salesperson's name, the prospect's address, phone number, contact dates, type of vehicle the prospect is looking for, the vehicle the prospect looked at, and information about the trade vehicle. The list also displays the customer source code, result, and any comments entered on the Enter Prospects screen. The end of the list displays the total number of prospects on the salesperson's reminder list.

1. Click **Reminder List For Salesman**.

2. Type the salesperson's number, or select the salesperson from the drop-down list. If you want to print reminder lists for all of the salespeople, type 00.

3. Type the date range you want to use to generate the list. This date is based on the existing Last Contact Date in the prospect record. You must type the date in an eight-character format with or without slashes (mm/dd/yyyy or mmddyyyy).

4. Click **OK** to accept the dates.

5. When prompted to verify your printer is ready, select your print criteria.

Reminder List For Prospect

Use this button to print a reminder list for a specific prospect. The reminder list displays the salesperson's name, the prospect's address, phone number, contact dates, type of vehicle the prospect is looking for, the vehicle the prospect looked at, and information about the trade vehicle. The list also displays the customer source code, result, and any comments entered on the Enter Prospects screen.

1. Click **Reminder List For Prospect**.

2. Type the prospect number, or click the "Click for list" message to display a list of prospects. Click the prospect you want to select.

3. When prompted to verify your printer is ready, select your print criteria.

Managers Reminder List

Use this button to print a list of all of the prospects that came into the dealership during a specific date range. The results of the Manager's Reminder List depend on whether the **Looking For** section of the Enter Prospect screen indicates a new (N) or used (U) vehicle. If this field is omitted, the prospects will not appear on the Manager's Reminder List. The list will exclude any prospects that have been flagged **1** (Sold) on the Enter Results screen.

The printout groups all of the prospects looking for new vehicles together and all of the prospects looking for used vehicles together. The reminder list displays the salesperson's name, the prospect's address, phone number, contact dates, type of vehicle the prospect is looking for, the vehicle the prospect looked at, and information about the trade vehicle. The list also displays the customer source code, result, and any comments entered on the Enter Prospects screen. The end of each section displays the total number of prospects in the new or used group.

1. Click **Managers Reminder List**.

2. Type the date range you want to use to generate the list. You must enter the dates in an eight-character format with or without slashes (mm/dd/yyyy or mmddyyyy).

3. Click **OK** to accept the dates.

4. When prompted to verify your printer is ready, select your print criteria.

Prospect 'Trade In' List

Use this button to print a list of the potential trade-in vehicles. The system scans the fields in the **Trade** section on the Enter Prospects screen to generate this list. If the salesperson omits this information on the prospect screen, the system cannot generate the report. The list displays the vehicle's year, make, model, actual cash value, and condition, as well as the prospect's name.

1. Click **Prospect 'Trade In' List**.

2. Type the date range you want to use to generate the list. You must enter the dates in an eight-character format with or without slashes (mm/dd/yyyy or mmddyyyy).

3. Click **OK** to accept the dates.

4. When prompted to verify your printer is ready, select your print criteria.

Prospect 'Look For' List

Use this button to print a list of prospects and the type of vehicle they are looking to buy. The system scans the fields in the **Looking For** section on the Enter Prospects screen to generate this list. If the salesperson omits this information on the prospect screen, the system cannot generate the report. For each prospect on the list, it displays if the prospect is looking for a new or used vehicle, the type of vehicle the prospect is looking for, the target price, the salesperson working with the prospect, the date the prospect came to the dealership, and the trade vehicle's information.

1. Click **Prospect 'Look For' List**.

2. Type the date range you want to use to generate the list. You must enter the dates in an eight-character format with or without slashes (mm/dd/yyyy or mmddyyyy).

3. Click **OK** to accept the dates.

4. When prompted to verify your printer is ready, select your print criteria.

Prospect 'Looked At' List

Use this button to print a list of the vehicles in your inventory prospects have looked at while at the dealership. The system scans the **Stock** field in the **Looking For** section on the Enter Prospects screen to generate this list. If the salesperson omits this information on the prospect screen, the system cannot generate the report. For each vehicle on the list, it displays the stock number, year, make, and model. It also lists the prospect's name, quoted price, salesperson, date of the first visit, and trade information.

1. Click **Prospect 'Looked At' List**.

2. Type the date range you want to use to generate the list. You must enter the dates in an eight-character format with or without slashes (mm/dd/yyyy or mmddyyyy).

3. Click **OK** to accept the dates.

4. When prompted to verify your printer is ready, select your print criteria.

Print Daily Worksheets

Use this button to print a list of the prospects flagged to be contacted on the current day. The system generates this list based on the **Next Contact** field on the Enter Prospects screen.

1. Click **Print Daily Worksheets**.

2. When prompted to verify your printer is ready, select your print criteria.

Chapter 22 Long-Term Prospects

You use the Long-Term Prospects menu to enter and track long-term prospects. These individuals are not ready to purchase a vehicle when they come to the dealership, but you want to track them anyway. The options allow you to print long-term prospect reminder lists so you do not forget about these prospects. You can also use the menu to make long-term prospects active prospects when they are ready to buy or to change an active prospect into a long-term prospect.
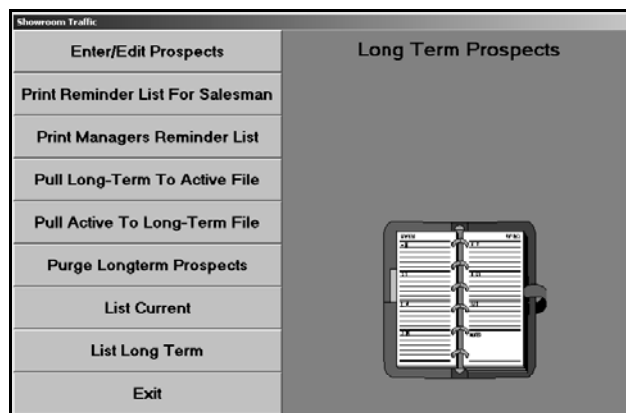
Enter/Edit Prospects

Use this button to open the Long-Term Prospects screen to enter prospects. You enter the same information for long-term prospects that you enter for current prospects: the customer's information, information about the vehicle the customer is looking for, and information about the customer's potential trade-in vehicle. You also indicate the next date you want to contact the prospect. The system uses this date when it is generating followup lists and letters.

Print Reminder List For Salesman

Use this button to print a reminder list for long-term prospects. You indicate the month and year you want to use for the list. The system looks at the **Next Contact** field to determine which prospects it needs to add to the list. This list can provide a month-at-a-glace followup summary for a salesperson. The list prints complete customer-contact information for each prospect.

1. Click **Print Reminder List For Salesman**.

2. Type the salesperson's number, or select the salesperson from the drop-down list. If you want to print reminder lists for all of the salespeople, type 00.

3. Type the month and year you want to use to generate the list.

4. When prompted to verify your printer is ready, select your print criteria.

Print Managers Reminder List

Use this button to print a reminder for managers. This list prints all of the long-term prospects each salesperson needs to contact during a specific month and year. This allows sales managers to check with salespeople to ensure they are conducting their follow-up.

1. Click **Print Managers Reminder List**.

2. Type the month and year you want to use to generate the list.

3. When prompted to verify your printer is ready, select your print criteria.

Pull Long-Term To Active File

Use this button to make a long-term prospect's file an active prospect file. This moves the prospect from the Long-term prospect list to the current prospect list.

1. Click **Pull Long-Term To Active File**.

2. Type the prospect number, or click the "Click for list" message to select the prospect.

3. Click **OK** when prompted to verify you want to merge the file.

Pull Active To Long-Term File

Use this button to make an active prospect's file a long-term prospect file. This moves the prospect from the current prospect list to the long-term prospect list.

1. Click **Pull Active To Long Term File**.

2. Type the prospect number, or click the "Click for list" message to select the prospect.

3. Click **OK** when prompted to verify you want to merge the file.

Purge Long-Term Prospects

Use this button to delete all the long-term prospect files older than a specified number of months.

1. Click **Purge Long-Term Prospects**.

2. Type the number of months you want to use to delete the records. The system deletes all prospect files older than the number of months you enter.

3. Click **OK** when prompted to verify you want to purge the files.
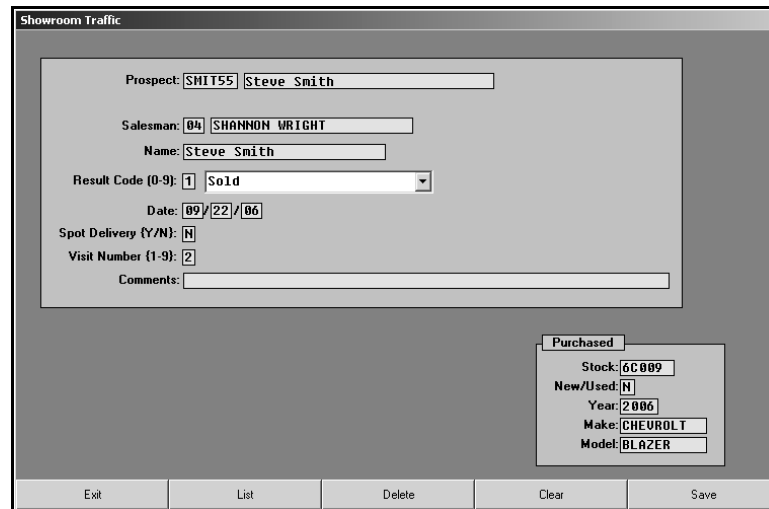
Use the last two buttons on the menu to view the prospect lists.

List Current: The current list is the list of prospects entered using the **Enter Prospects** button on the Showroom Traffic main menu.

List Long Term: The long-term prospect list is the list of prospects entered using the **Enter/Edit Prospects** button on this menu.

Chapter 23 Enter Results

When you are finished with a prospect, click **Enter Results** to record the result for the prospect. The information on this screen pulls from the Enter Prospects screen. You can edit the information as needed. The activity reports and traffic reports use the result codes to generate the activity and sales statistics. The accuracy of the reports depends on the accuracy of the information you enter here.

Entering a Result

1. Click **Enter Results**.

2. Type the prospect number, or click **List** to select the prospect. Click the prospect you want to select from the list that appears.

3. The prospect's information fills in on the screen.

4. Type the result code, or select the code from the drop-down list. The list displays all of the codes you entered on the Miscellaneous Parameters screen in the system setup.

5. The **Date** field automatically defaults to the system date when you enter a result code 1-9. You can edit this field as needed. The date should be the date you want to record as the ending date for the prospect file. For sales, this is the sale date. No date fills in for a blank or zero result code.

6. Use the **Spot Delivery** field to indicate if this was a spot delivery. This means the customer walked off the lot with the vehicle on the first visit. Type **Y** for yes or **N** for no.

7. Edit the **Visit Number** field so it reflects the appropriate number of visits the prospect made to the dealership.

8. The **Comments** field displays the comments from the first comment line on the Enter Prospects screen. Edit the field as needed.

9. If you entered a stock number for a vehicle in your stock in the **Looking For** section on the Enter Prospects screen, the vehicle information fills in the **Purchased** section on the bottom of the Results screen. Edit these fields, or enter the purchased vehicle's information in these fields as needed.

10. Click **Save** to save the information.

Deleting a Prospect

You can delete a prospect from this screen. This removes the prospect's record from the system. Make sure you want to delete the prospect file. Once you delete it, you cannot get it back.

1. Select the prospect.

2. Click **Delete**.

3. Click **Gone** when prompted to verify you want to delete the record.

Chapter 24 Reports

You can print two types of reports for your prospects: activity reports and traffic reports. The activity reports allow you to print statistics for salespeople and the dealership about the prospects. The system uses all of the prospect files to generate the activity reports. The traffic reports are sales reports that allow you to check the sales statistics for the salespeople and the dealership. The system only uses prospects with a result code of 1 (Sold) to generate traffic reports.

Activity Reports

This button advances you to the Activity Reports menu. The date ranges you specify for the reports apply to the First Contact date entered for the active prospects on the Enter Prospect screen. The date entered in the **From** field when specifying the date ranges you want to use for the reports determines the earliest First Contact date that will be included on the report. The program does not use the date entered when the prospect is flagged as sold with code 1 on the Enter Results screen for any of the Activity reports.

If you are performing the Traffic End-of-Month Update (from the System Setup & Updates menu), your active list of prospects will be current and valid. The End-of-Month Update removes the prospects flagged as sold (code 1) on the Enter Results screen and tabulates statistics for the number of months specified on the Miscellaneous Parameters screen in the Traffic system setup.
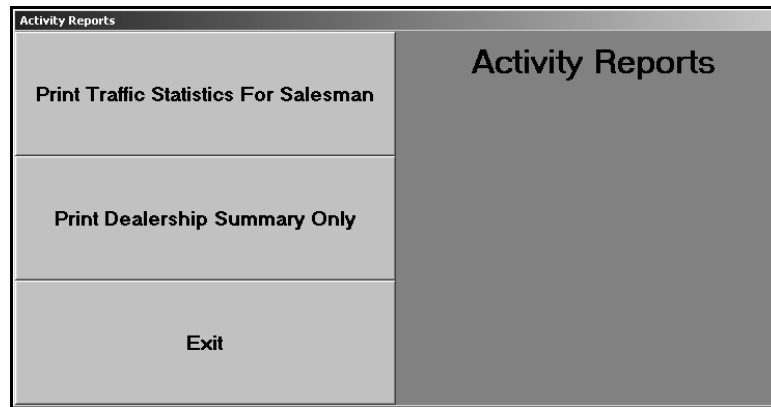
Print Traffic Statistics For Salesman

Use this button to print traffic statistics for a specific salesperson or all salespeople.
A summary prints for each salesperson on the report. Each summary lists the salesperson's prospects and indicates the actions take with each prospect (based on the actions entered on the Miscellaneous Parameters screen in the system setup). The summary also indicates the source that brought the prospect to the dealership, the number of visits, and if this was a spot delivery. The end of each summary lists the salesperson's total prospects, the total sales, and the closing ratio and indicates if the salesperson is on target with the goal or by how much the salesperson missed the goal. The end of the report provides a summary for the whole dealership.

1. Click **Print Traffic Statistics For Salesman**.

2. Type the salesperson's number, or select the salesperson from the drop-down list. If you want to print statistics for all salespeople, type 00.

3. Type the date range you want to use to the report. You must enter the date in an eight-character format with or without slashes (mm/dd/yyyy or mmddyyyy).

4. Click **OK**.

5. When prompted to verify your printer is ready, select your print criteria.

Print Dealership Summary Only

Use this button to print traffic statistics for the dealership. The same summary prints at the end of the Print Traffic Statistics for Salesman report.

1. Click **Print Dealership Summary Only**.

2. Type the date range you want to use to the report. You must enter the date in an eight-character format with or without slashes (mm/dd/yyyy or mmddyyyy).

3. Click **OK**.

4. When prompted to verify your printer is ready, select your print criteria.

Traffic Reports

The Sales Reports menu allows you to print sales reports for the dealership and salespeople for a specific date range. The menu also contains an option that allows you to print a customer source report to see where customers are hearing about your dealership. This report is useful when considering the marketing strategies your dealerships will use.

Print Store Sales Stats

Use this button to print sales statistics for the dealership based on the date range you specify. The report displays the dealership's total prospects, sales, gross, commission, and closing ratio.

1. Click **Print Store Sales Stats**.

2. Type the dates you want to use for the report. You must enter the dates in an eight-character format with or without slashes (mm/dd/yyyy or mmddyyyy). If you do not enter slashes, press ENTER after each date.

3. When prompted to verify your printer is ready, select your print criteria.

Print Sales Stats For Salesman

This option is currently unavailable.

Customer Source Report

Use this button to print statistics for the customer sources. The report lists each customer source and indicates the number of customers that came into the dealership because of each source for the current year and the previous year.

1. Click **Customer Source Report**.

2. When prompted to verify your printer is ready, select your print criteria.

Chapter 25 Utility Mailing Lists

The Utility Mailing Lists menu allows you to create up to 98 lists you can use to print mailing labels and customer letters. Printing letters from this menu provides a bit more flexibility. When you print letters from the Prospect Follow-Up Letters menu, you can only select customers who have prospect files in the Showroom Traffic module. This menu allows you to pull your current prospects to the list you create, and it allows you to add customers who do not have prospect files to the list. This is useful when you want to send someone a letter but do not want to enter the individual as a prospect.
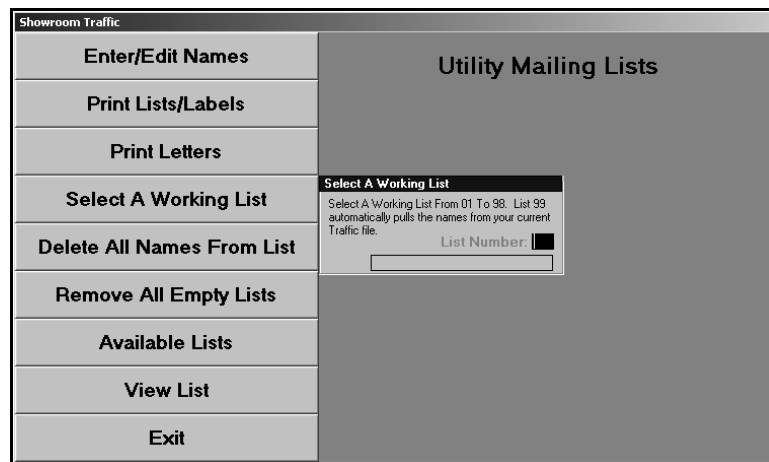
The system prompts you to select a working list as soon as the menu appears. When you want to create a new list, type the number for the list you are creating. To manually create a list, type a number from 01 to 98. Click **Yes** to create the new list. The number you entered becomes the list ID for the list you are going to create.

To pull your current prospect files, type 99 as the working list. Click **New** when prompted to verify you are pulling the list from the traffic files.

If you need to change the list, click **Select Working List** to display the data list again. You can also click **Available Lists** to select the working list. Use the **View List** button to display the list of prospects on the selected list. This helps you ensure you have selected the correct list.

Enter/Edit Names

Use this button to open the Enter Mailing List Names screen to add customers to the mailing list or to edit customers already on the mailing list.

Adding a New Prospect

Entering a prospect on this screen only adds the prospect to the utility list. It does not create a prospect file for the customer. If you want to create a prospect file, enter the prospect's information using the **Enter Prospect** button on the Showroom Traffic menu.

1. Click **Enter/Edit Names**. The Enter Mailing List screen appears.

2. In **Name Code**, type a customer code for the prospect. The code can be up to six alphanumeric characters and should follow your dealership's method for assigning customer/prospect numbers.

3. Use the **Active/Inactive** field to indicate if the prospect is active or inactive. Type **A** for active and **I** for inactive. Letters will only print for active prospects.

4. In **Class**, type the class code you want to assign the prospect. Assigning a class code is a way of uniquely identifying a particular type or group of prospects. You may even consider this class as way to rank a prospect. You can select to print prospect lists, mailing labels, and letters for a specific group of prospects based on the class.

5. Type the prospect's name and address, and type the name that should print on the salutation line of the letter.

6. In **Contact**, type the prospect's contact person at the dealership.

7. Type the prospect's phone number.

8. Use the **Current Vehicle** section to record information about the prospect's potential trade-in vehicle.

9. Click **Save** to save the prospect's information.

Editing an Existing Prospect's Information

1. Type the name code, or click **List** to select a prospect.

2. The prospect's information fills in on the screen.

3. Edit the information as needed.

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

Deleting a Prospect from the List

Deleting the prospect from the list does not delete the prospect's record from the system unless you entered the prospect on this screen. If you entered the prospect on this screen, the prospect's information is deleted when you delete the prospect from the list.

1. Select the prospect.

2. Click **Delete**.

3. Click **OK** when prompted to verify you want to delete the record.

Print Lists/Labels

This button advances you to the Print Lists & Labels menu. This menu allows you to print mailing lists and labels by ZIP Code/Postal Code, class, or area code. You needed to enter a class on the Enter Mailing List Names screen in order to print by class. Use the **List** button to view the list of prospects on the mailing list.
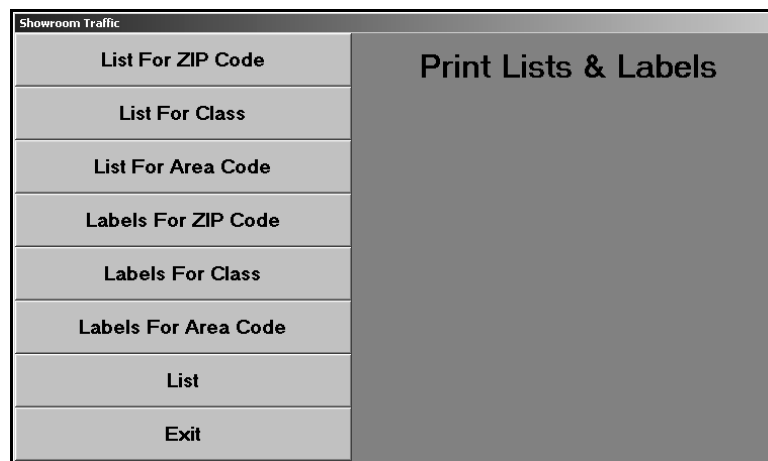
> **Tip:** Although you can select to print to screen to preview the labels, only print the labels from Autosoft FLEX DMS. This ensures your labels will print properly.

List For ZIP Code

Use this button to print a list of the prospects on the mailing list with a specific ZIP Code.

1. Click **List For ZIP Code**.

2. Type the ZIP Code, or leave the field blank to print a list for all ZIP Codes.

3. When prompted to verify your printer is ready, select your print criteria.

List For Class

Use this button to print a list of the prospects on the mailing list with a specific class code. You entered the class code on the Enter Mailing List Names screen.

1. Click **List For Class**.

2. Type the class code you want to use.

3. When prompted to verify your printer is ready, select your print criteria.

List For Area Code

Use this button to print a list of the prospects on the mailing list with a specific area code.

1. Click **List For Area Code**.

2. Type the area code you want to use.

3. When prompted to verify your printer is ready, select your print criteria.

Labels For Zip Code

Use this button to print mailing labels for prospects on the mailing list based on ZIP Code.

1. Click **Labels For ZIP Code**.

2. Type the ZIP Code, or leave the field blank to print labels for all ZIP Codes.

3. When prompted to verify your printer is ready, select your print criteria.

Labels For Class

Use this button to print mailing labels for prospects on the mailing list based on class code.

1. Click **Labels For Class**.

2. Type the class code you want to use.

3. When prompted to verify your printer is ready, select your print criteria.

Labels For Area Code

Use this button to print mailing labels for prospects on the mailing list based on area code.

1. Click **Labels For Area Code**.

2. Type the area code you want to use.

3. When prompted to verify your printer is ready, select your print criteria.

Print Letters

This button advances you to the Print Letters menu. You use this menu to print letters for prospects on the current utility list. Use the **List** button to view the list of prospects on the mailing list. You can select to print letters base on ZIP Code or class. You needed to enter a class on the Enter Mailing List Names screen in order to print letters by class. You can also select to print a letter for one prospect on the list.
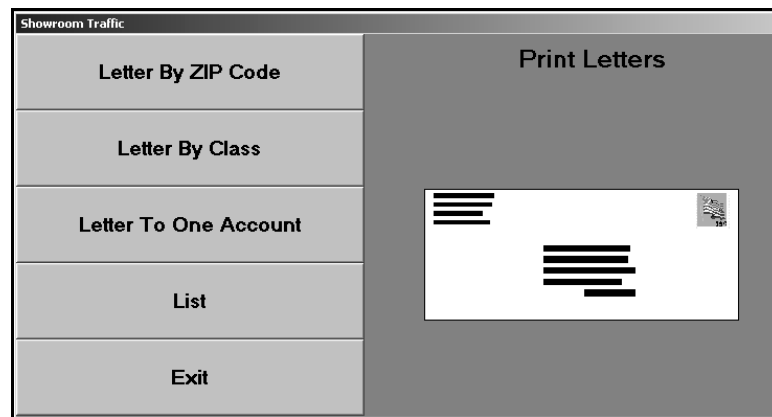
1. Click the button that corresponds to the letter you want to print.

   Letter By Zip Code: Use this button to print letters for prospects based on the ZIP Code you specify.

   Letter By Class: Use this button to print letters for all of the prospects that have a specific class code. You entered the class code on the Enter Mailing List Names screen.

   Letter To One Account: Use this button to print a letter for one prospect on the mailing list.

2. Type the ZIP Code, class, or account number you want to use for the letter.

3. Next, type the letter number, or click the "Click for list" message to select the letter.

4. Finally, type the name and title that should print on the signature line.

5. When prompted to verify your printer is ready, select your print criteria.

Delete All Names From List

Use this button on the Utility Mailing List menu to delete a list. This removes the list from the system. The information for any prospects you entered using the **Enter/Edit Names** button on this menu will not be available. You will have to add the prospect's information again if you want include the prospect on lists or print labels and letters for the prospect.

1. Click **Delete All Names From List**.

2. Type the list number.

3. Click **OK** when prompted to verify you want to delete the records.

Remove All Empty Lists

Use this button to delete all the empty mailing lists. This removes the lists from the system.

1. Click **Remove All Empty Lists**.

2. Click **OK** when prompted to verify you want to delete the records.

3. The system returns you to the Showroom Traffic menu.

Chapter 26 End-of-Month Update

At the end of the month, you must update the traffic files. The update removes all of the completed/sold. The system holds "open" prospect information for the number of months specified using the Miscellaneous Parameters option. The screen will display the number of months the system is set to retain the prospect files and the date of the last update for your reference.

1. Click **System Setup & Updates** on the Showroom Traffic menu.

2. The System Setup & Updates menu appears.
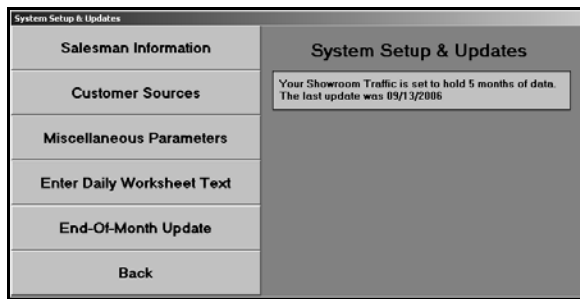
3. The box under the menu title displays the number of months the system is set to retain the data and the date of the last showroom traffic monthly update.
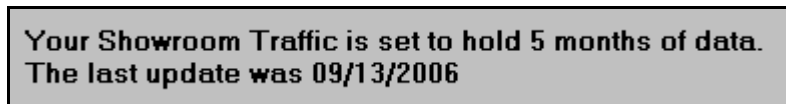
4. Click **End-of-Month Update** on the System Setup & Updates menu.

5. Type the month and year you are updating.
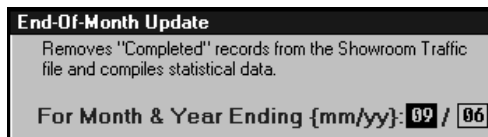
6. The system will indicate the date that will be used to retain the prospect information. Click **OK** to continue with the update.
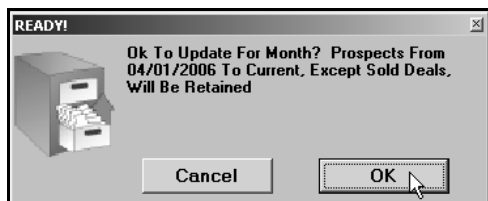
Chapter 27 Marketing Overview and Setup

The Marketing module helps you manage your marketing activities. You can us it to compile marketing lists and to print customer lists, mailing labels, and file cards. You can also use the menu to view a customer's service history.

Creating Customer Letters

When you click **Setup & Data Utilities**, the Setup /Customer Data Utilities menu opens. Before you begin using the Marketing module, you can use the **Compose Letters** button to create letters. You compose letters in the Showroom Traffic module the same way you do in the CSI & SSI module. Remember, all letters you create in CSI/SSI, Showroom Traffic, and Marketing are available in a common letter database. See "Creating a New Letter" on page 16 for instructions on creating letters.
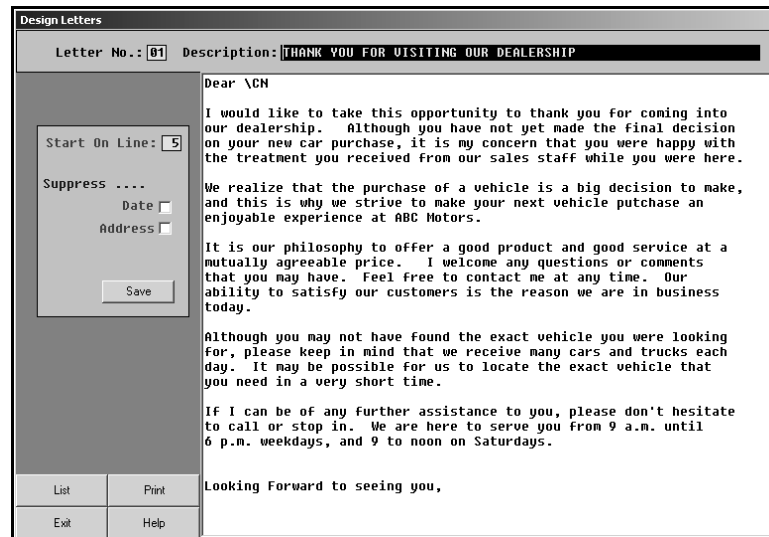
Viewing Customer History

The View Customer History button opens the Customer Information screen. You use this screen the same way you use the Customer Information screen in Desk Manager to view a customer's/vehicle's service history. Refer to chapter 17, "Customer History," on page 103 for instructions on using this screen.

Chapter 28 Compile Marketing Lists

The **Compile Marketing Lists** button opens the Compile Marketing Lists menu. You use this menu to compile a list of customers based on specific criteria. Once you generate the list, you edit it as needed to ensure it includes the correct customers. You can then download the list to a disk if an outside company conducts marketing activities for your dealership, or you use the list to print marketing letters and mailing labels. (Chapter 29 covers printing documents using the compiled list).
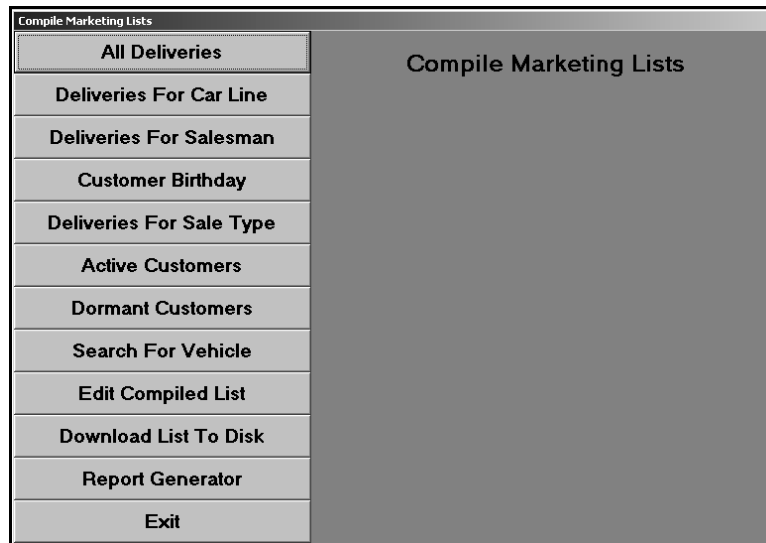
The first eight buttons on the menu are your compiling options. Click the button that corresponds to the list you want to generate. The system prompts you to enter any additional criteria you can specify to generate the list. You can only use one option to generate the marketing list. When the system generates the list, it overwrites the last generated list.

When the system scans to compile the list, it scans <u>all</u> customer files and includes <u>all</u> customers that meet the criteria you specify. This includes any internals, dealer trades, etc. that have customer files in the customer database. Because of this, you should always edit the list to remove any customers you do not want to remain on the list. When you choose a "print all" option based on the compiled list, the system prints labels or letters for <u>all</u> customers on the list, including any internals, dealer trades, etc. you did not remove from the compiled list.

Tip: Federal law prohibits telemarketing of customers who you have not done business with in the last 18 months. Keep this in mind when specifying the dates you want to use for a marketing list you will use for telemarketing purposes.

All Deliveries

Use this button to compile a marketing list based on the vehicle type (new, used, other, or all) delivered to customers for a specific date range.

1. Click **All Deliveries**.

2. Indicate the type of vehicle you want to use to generate the list. Type **N** for new, **U** for used, **O** for other, or **A** for all.

3. Type the date ranges. You must enter the date in an eight-characters format with or without slashes (mm/dd/yyyy or mmddyyyy). Press ENTER to continue if you do not use slashes.

4. Click **OK** when prompted to verify you want to compile the list.

5. When the system is finished compiling the list, it displays a message indicating the total number of files added to the list. Click **OK** to acknowledge the message.

Deliveries For Car Line

Use this button to generate a marketing list based on the vehicle sales from a specific car line for a specific date range. The car line is a number from 1-9. The car lines were created in the Accounting module.

1. Click **Deliveries For Car Line**.

2. Type the car line.

3. Type the date ranges. You must enter the date in an eight-characters format with or without slashes (mm/dd/yyyy or mmddyyyy). Press ENTER to continue if you do not use slashes.

4. Click **OK** when prompted to verify you want to compile the list.

5. Click **OK** to acknowledge the number of records added to the list.

Deliveries For Salesman

Use this button to generate a list of vehicle sales for a specific salesperson for a specific date range.

1. Click **Deliveries For Salesman**.

2. Type the salesperson's number, or select the salesperson from the drop-down list.

3. Indicate the type or sale you want to use to generate the list. Type **N** for new, **U** for used, or **A** for all.

4. Type the date ranges. You must enter the date in an eight-characters format with or without slashes (mm/dd/yyyy or mmddyyyy). Press ENTER to continue if you do not use slashes.

5. Click **OK** when prompted to verify you want to compile the list.

6. Click **OK** to acknowledge the number of records added to the list.

Customer Birthday

Use this button to generate a list based on the customers' birthday. The service writer should have entered the birthday on the Customer Information screen in the Service Writing module. The system only pulls customers with birthdays recorded in their files.

1. Click **Customer Birthday**.

2. Type the month and the range of days within the month you want to use to generate the list.

3. Click **OK** when prompted to verify you want to compile the list.

4. Click **OK** to acknowledge the number of records added to the list.

Deliveries For Sale Type

Use this button to generate a list of vehicle sales based on sale type (lease, purchase, finance) for a specific date range.

1. Click **Deliveries For Sale Type**.

2. Indicate the type of sale you want to use to generate the list. Type **L** for lease, **P** for purchase, or **F** for financed.

3. Type the date ranges. You must enter the date in an eight-characters format with or without slashes (mm/dd/yyyy or mmddyyyy). Press ENTER to continue if you do not use slashes.

4. Click **OK** when prompted to verify you want to compile the list.

5. Click **OK** to acknowledge the number of records added to the list.

Active Customers

Use this button to print a list of customers who came to the dealership for service within a specific number of months. If you want to print a list of customers due to come in for service, you can print the list from the Follow Up & Marketing menu in the Service Writing module.

1. Click **Active Customers**.

2. Type the number of months you want to use to generate the list.

3. Click **OK** when prompted to verify you want to compile the list.

4. Click **OK** to acknowledge the number of records added to the list.

Dormant Customers

Use this button to generate a list of customers that have _not_ visited the dealership within a specific number of months. The system compiles the list based on the last service date. If there is no last service date, the system uses the delivery date.

1. Click **Dormant Customers**.

2. Type the number of months you want to use to generate the list.

3. Click **OK** when prompted to verify you want to compile the list.

4. Click **OK** to acknowledge the number of records added to the list.

Search For Vehicle

Use this button to generate a list of customers based on vehicle year, make, and/or model.

1. Click **Search For Vehicle**.

2. Type the year, make, and model you want to use to generate the list. If you leave a field blank, the system ignores the field during the search.

3. Click **OK** when prompted to verify you want to compile the list.

4. Click **OK** to acknowledge the number of records added to the list.

Edit Compiled List

Click **Edit Compiled List** to open the Edit Compiled List screen. You use this screen to review the compiled list, remove customers from the list, and edit customer information. The system saves any changes you make to a customer's information on this screen to the customer's master file in the Autosoft FLEX DMS system.

Editing Customer Information

1. Click **Edit Compiled List**.

2. The screen displays the customers on the compiled list. The customers on the list are organized according to the last eight digits of the VIN. Click **Prev** and **Next** to advance to the previous and next pages of the list.

3. Use the sort options in the bottom right corner to sort the list based on the last eight characters of the VIN, the customers' account number, the customers' ZIP Code, or the customers' last name. Click the circle next to the sort option you want to select.

4. Click a customer in the list to view the customer's information.

5. Edit any information as needed. Remember, the system saves the changes to the customer's master file.

6. If you edit the **Active/Inactive** field, the edit is saved in the customer's file. Only customer flagged **A** for active will pull to the marketing list. If you change the status to **I** for inactive on this screen, the customer will be removed from the current marketing list, and the change will be saved to the customer's master file.

7. Make sure there is a name in the **Salutation** field. If this field is blank, no name will print for the customer name merge field (\CN) on letters you print for the customer.

8. If you edit any information, click **Save** to save the changes.

Removing Customers from the List

You should always edit the list to remove any customer you do not want on the list. Remember, the system may include internals or dealer trades that have customer files in the system, so you should edit the list to remove these "customers." Editing the list only removes customers from the current compiled list; this does not remove the customer records from the system. There are two ways to remove customers from the list. You can use the **Pre-Edit List** button or the **Remove Record** button.

Pre-Editing the List

The **Pre-Edit List** button allows you to view a list of all the customers on the compiled list. This option allows you to remove customers from the list without viewing their information. This only removes the customers from the current compiled list. It does not remove the customer records from the system.

1. Click **Pre-Edit List**.

2. Click **Previous** and **Next** to advance to the previous and next pages of the list.

3. Click the customer's name to remove the customer from the list. The customer's status changes from "Active" to "Remove." (Click the customer again to change the status back to "Active" if needed.) Continue to work your way through the list until you have removed all of the customers you do not want on the list.

4. Click **Back** to return to the edit screen. The customers you removed no longer appear in the list on this screen.

Removing Customers on the Edit screen

The **Remove Record** button allows you to remove customers on the list after viewing their information. This only removes the customers from the current compiled list. It does not remove the customer records from the system.

1. Click **Prev** and **Next** to advance to the previous and next pages of the list.

2. Click the customer's name, and the information fills in the fields on the bottom of the screen.

3. Click **Remove Record**.

4. Click **OK** when prompted to verify you want to delete the record. The system removes the customer from the list.

Download List To Disk

If a marketing company performs marketing activities for your dealership, you use this button to download the compiled list to a disk. You can download the list to a floppy disk (A drive) or the local hard drive (C drive). If you select to download the disk to a floppy disk, you are limited to the size of the floppy disk.

1. Click **Download List To Disk**.

2. When prompted to select the format, click **Flat ASCII** to save the list as an ASCII file or **Comma Delim** to save the file as a Comma Delimited file. (Comma Delimited is the format commonly required by vendors.)

3. When prompted to select a location for the download, click **A Drive** to download the file to a floppy disk or **C Drive** to download the file to the local hard drive. If you select to download the file to a floppy disk, make sure a formatted disk is in the disk drive.

4. Click **OK** when prompted to verify you want to download the file.

5. The system displays a "Did That" message when it is finished with the download. Click **OK** to acknowledge the message.

Report Generator

Use this button to open the report generator to create customer reports and lists. Please refer to your dealership's *Report Generator* manual. You can also view a complete online manual from the Report Generator. Click the Help icon (question mark) in the Report Generator, and click the "Download the complete Report Generator manual" link on any of the help screens.

Chapter 29 Print from Compiled List

Once you compile the marketing list, click **Print From Compiled List** on the Marketing menu. This opens the Print From Compiled Data menu. You use the options on this menu to print the compiled list and to print labels and letters for the customers on the list.

Print Lists / Labels	
Print Long List	Print From Compiled Data
Print Short List	
Print Labels	
Print Letters	
Exit	
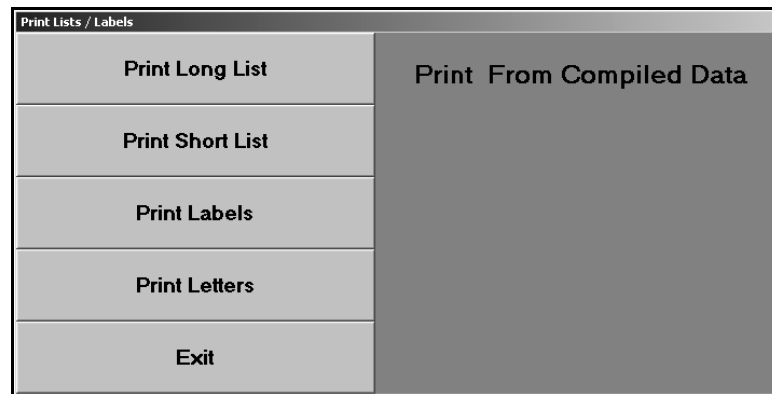
Print Long List

Use this button to print a detailed version of the compiled list. The long list displays the customer's name, the vehicle delivery date, model year, make, model, last eight characters of the VIN, last service date, next service date, description for the next service due, the customer's home and work telephone numbers, and the customer's salesperson.

1. Click **Print Long List**.

2. When prompted to verify your printer is ready, click to select **To Printer** to print the list or **To Screen** to view the list on your screen.

3. Once you select your print criteria, click **Print**.

4. If you select to print the information to your screen, you can print the report from the viewing screen by clicking **File** and **Print**. To exit the viewing screen, click **File** and **Exit**.

Print Short List

Use this button to print an abridged version of the compiled list. The short list displays the customer's name, address, and home telephone number.

1. Click **Print Short List**.

2. When prompted to verify your printer is ready, select your print criteria.

Print Labels

This button advances you to the Print Labels menu. You use this menu to print mailing labels for the customers on the compiled list. You must use 1x4 laser-compatible labels. You have the option of printing labels for all customers on the list or for a selected customer. Although you can select to print to screen to preview the labels, only print the labels from Autosoft FLEX DMS. This ensures your labels will print properly.
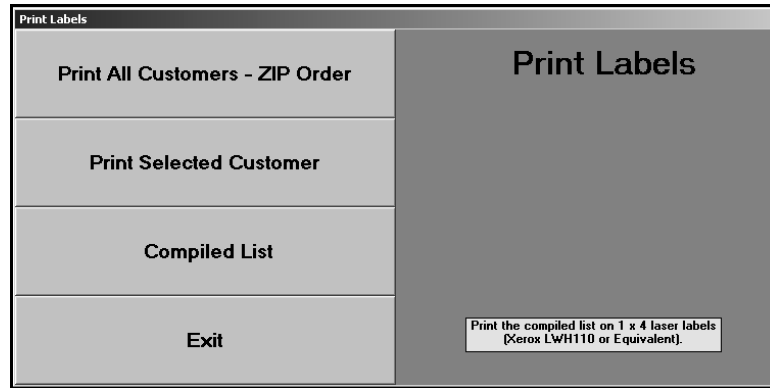
Print All Customers—Zip Code Order

Use this button to print labels for *all* the customers on the list. Remember, this includes any internals or dealer trades that may be on the list that you did not remove. The system sorts the customers by ZIP Code and prints the labels in ZIP Code order. You can select a customer on the list, and the labels will begin printing from the customer's ZIP Code.

Printing Labels for all Customers on the List

1. Click **Print All Customers-ZIP Order**.

2. Leave the **Starting With Zip** field blank, and press TAB or ENTER.

3. Click to select **To Printer**, and click **Print**.

Printing Labels Starting with a Selected Zip Code

1. Click **Print All Customers-ZIP Order**.

2. Click **Compiled List** when prompted to enter the ZIP Code you want to use as the starting point.

3. Click **Zip Sort** to sort the list by ZIP Code or **Cust Sort** to sort the list by the customers' last names.

4. Click the customer who you want to use as the starting point for the print job. The customer's ZIP Code is displayed on the screen. Press the TAB or ENTER key.

5. Click to select **To Printer**, and click **Print**.

Print Selected Customer

Use this button to print a label for a specific customer.

1. Click **Print Selected Customer**.

2. Click **Compiled List** when prompted to select a customer.

3. Click **Zip Sort** to sort the list by ZIP Code or **Cust Sort** to sort the list by the customers' last names.

4. Click the customer you want to select, and press TAB or ENTER.

5. Click to select **To Printer**, and click **Print**.

Compiled List

In addition to selecting customers when printing labels, you can use the **Compiled List** button to view the list as needed. Click **Zip Sort** to sort the list by ZIP Code or **Cust Sort** to sort the list by the customers' last names. Click **Exit** to return to the Print Labels menu.

Print Letters

This button advances you to the Print Letters menu. You use this menu to print letters for customers on the compiled list. When printing letters, you must specify the letter you want to print. Once you select the letter, the system prompts you to enter the signature and title that should print on the letter. Your letter must contain merge fields for the sender's name (\SG) and title (\TI for) on the signature line, or the system will not pull the information you enter.

Edit Compiled List

Before you print the letters, you can use the **Edit Compiled List** button to edit the compiled list. You can edit customer information, mark which customers you want to receive letters, and remove customers from the list. By default, all customers on the compiled list are flagged not receive a letter. You must edit the list to mark the customers you want to receive a letter.

1. Click **Edit Compiled List**.

2. The window on the right side of the screen displays the list of customers (organized according the customer account number). The information for the first customer on the list automatically fills in the fields on the left side of the screen. You can also select individual customers by entering the account number or by clicking the customer in the list on the right side of the screen. (Use the **Prev** and **Next** buttons to scroll through the customer list.) The selected customer's information fills in on the screen.

3. Verify the customer's information. You can edit a customer's information on this screen, but the changes will not update to the customer's master file. The edits only affect how the information prints on the letters. If you need to permanently edit the information, you must edit it in the customer's master file.

4. Verify a name appears in the **Salutation** field. Type a name if one does not fill in this field. If this field is blank, no name will print for the customer name merge code (\CN) on the letter.

5. Click one of the three buttons to select the action you want to take:

   - Click **OK** to flag the customer to receive a letter. Customers flagged to receive letters have a status of "Letter."

   - Click **NO** to flag the customer not to receive a letter. Customers flagged not to receive letters have a status of "No."

   - Click **Remove** to remove the customer from the list.

Tip: If you want to set the whole list to the same status, you can click **Set All Records**. Click **Send Letter** to set all record to receive a letter or **No Letter** to set all records not to receive a letter.

6. As you click the buttons, the screen automatically displays the next customer's information. Continue to work your way through the list.

7. The system will prompt you with a "That's All" message when you have finished editing the entire list. Click **OK** to acknowledge the message.

Compiled List

The **Compiled List** button displays the current compiled list. For each customer on the list, it displays the customer's account number and vehicle's model year, make, and model name. You can use this list to select customers when you are printing letters.

1. Click **Compiled List** when prompted to select the customer you want to use as the starting point for the print job or to select the customer for the letter.

2. Click the customer you want to select. The **Account** field displays the customer's account number for your reference.

Master List

For the most part, this button only serves to select customers from the master customer database so you can print a letter for that customer. When you search for a customer, the master list, like the compiled list, displays the customer's account number and vehicle's model year, make, and model name. Because it displays such limited information, it may not serve as a good reference when inquiring about a customer in the master customer database. Use the **View Customer History** button on the Marketing menu to view the detail in a customer's master file.

1. Click **Master List** when prompted to select a customer for the letter.

2. Type the first three letters of the customer's last name. The system will take you to the first customer on the list whose name begins with the letters you entered.

3. Click the customer you want to select. The **Account** field displays the customer's account number for your reference.

Print Letters For Edited Records Only

Use this button to print letters for the edited records starting with a specific account. This only prints letters for customers whom you flagged to receive a letter on the Edit Compiled List screen.

1. Click **Print Letters For Edited Records Only**.

2. When prompted to select a customer as the starting point, click **Compiled List** to select the customer.

3. Type the letter number, or select the letter from the drop-down list. The name of the letter is displayed for your reference.

4. Type the signature and title as needed.

5. When prompted to verify your printer is ready, select your print criteria.

Print Letters for All Records

Use this button to print letters for all of the customers on the compiled list starting with a specific customer.

1. Click **Print Letters For All Records**.

2. When prompted to select a customer as the starting point, click **Compiled List** to select the customer.

3. Type the letter number, or select the letter from the drop-down list. The name of the letter is displayed for your reference.

4. Type the signature and title as needed.

5. When prompted to verify your printer is ready, select your print criteria.

Print Letters For One Account

Use this button to print a letter for a specific customer.

1. Click **Print Letters For One Account**.

2. When prompted to select a customer as the starting point, click **Compiled List** to print a letter for a customer on the compiled list or **Master List** to print a letter for a customer from the master customer database.

3. Type the letter number, or select the letter from the drop-down list. The name of the letter is displayed for your reference.

4. Type the signature and title as needed.

5. When prompted to verify your printer is ready, select your print criteria.

Chapter 30 Print Customer Lists/Labels

In addition to printing lists and labels for customers on the compiled marketing list, you can print lists and labels for customers in the master customer database. Click **Print Customer Lists/Labels** on the Marketing menu to open the Print From Customer Database menu.   The "All" options on this menu will print ***every customer*** who has a file in the system's customer database, including internals, dealer trades, etc.

One option you have is to use the Report Generator to compile a customer list from the Service Writing module. Then, export the list to Microsoft® Excel. The list will help you identify any customer files for internals, dealer trades, etc. It will also help you identify customers whose files are missing information or customers with multiple customer files in the database. (You can use the list to delete duplicate customer files as needed.) You should edit the list in Microsoft Excel before saving or printing it. You would then use the list to print labels from another program (Microsoft Word, etc.). You cannot use the edited list in the Autosoft FLEX DMS system.
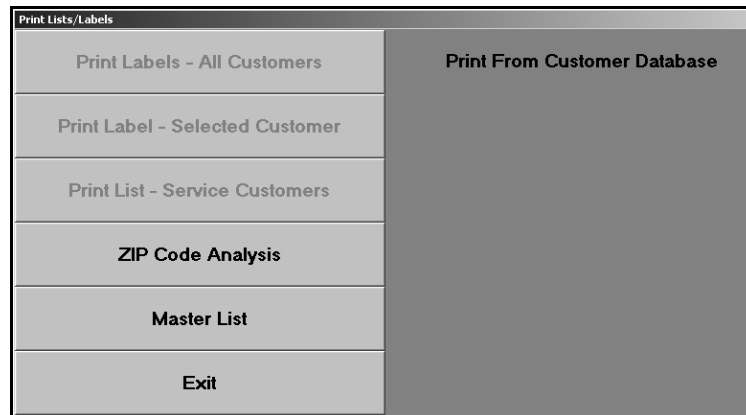
Print Labels—All Customers

This option is currently unavailable.

Print Label—Selected Customer

This option is currently unavailable.

Print List—Service Customers

This option is currently unavailable.

Print ZIP Code Analysis

Use this button to print a ZIP Code analysis for sales within a specific date range. The printout lists all of the ZIP Codes found in the system. For each ZIP Code, it lists the city, the number of customers who have the ZIP Code, and the percentage of the customer base these customers make up. The end of the printout lists the total number of customers and the total number of ZIP Codes.

1. Click **Print ZIP Code Analysis**.

2. When prompted, indicate the vehicle type you want to use to generate the list. Type **N** for new, **U** for used, or **A** for all.

3. Type the date range for the sales. You must enter the date as eight characters with or without slashes (mm/dd/yyyy or mmddyyyy). Press ENTER if you do not use slashes.

4. 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.

5. Once you select your print type, click **Print**.

Master List

You can use this button to bring up the Search Customer Base screen to search for a customer in the master customer database. You can currently only use this option to view a list of customers.

1. Click **Master List** when prompted to select a customer.

2. Type the first three letters of the customer's last name or the last four digits of the customer's phone number. The screen displays a list of customers who meet the criteria you entered.

3. Click **Abort** to close the screen.

Chapter 31 Print File Cards/Postcards

In addition to printing lists and labels for customers in the master customer database, you can print service file cards and service folder labels, too. All of the label options require 1"x4" laser labels. Click **Print File Cards/Postcards** on the Marketing menu to open the Print Labels/File Cards menu. The **Master List** button on this menu works the same way it does on the Print From Customer Database menu when you are printing lists and labels.

Print Labels All Customers

Use this button to print service file labels for **all** customers (including any internals, dealer trades, etc.) with customer files in the system. In addition to the customer's name, address, and phone number, each label lists the VIN and delivery date for the customer's vehicle.

1. Click **Print Labels All Customers**.

2. The system indicates the total number of labels to be printed and the total number of sheets that will print.

3. Click to specify the sort order you want to use for the labels. Click **Name Sort** to print the labels by customers' last name, or click **Last 8** Sort to print the labels according to the last eight digits of the VIN.

4. When prompted to verify your printer is ready, select your print criteria.

Print Card For Selected Customer

Use this button to print a "service file card" for a specific customer. The information prints on an 8.5"x11" sheet of paper that you can cut and attach to the service folder. The service file card lists the customer's account number, name, address, phone number, salesperson, and service contract. It also lists the vehicle's model year, make, model, type (new or used), delivery date, in-service date, VIN, and key codes.

1. Click **Print Card For Selected Customer**.

2. When prompted to specify the customer, click **Master List** to select the customer.

3. Type the first three letters of the customer's last name or the last four digits of the customer's phone number. A list of customers who meet the criteria you entered is displayed. Click the customer you want to select.

4. When prompted to verify your printer is ready, select your print criteria.

Print Label For Selected Customer

Use this button to print a mailing label for a specific customer.

1. Click **Print Label For Selected Customer**.

2. When prompted to specify the customer, click **Master List** to select the customer.

3. Type the first three letters of the customer's last name or the last four digits of the customer's phone number. A list of customers who meet the criteria you entered is displayed. Click the customer you want to select.

4. When prompted to verify your printer is ready, select your print criteria.

Address Envelope/Postcard

Use this button to print a customer's name and address on an envelope. This option prints one envelope for the selected customer.

1. Click **Address Envelope/Postcard**.

2. When prompted to specify the customer, click **Master List** to select the customer.

3. Type the first three letters of the customer's last name or the last four digits of the customer's phone number. A list of customers who meet the criteria you entered is displayed. Click the customer you want to select.

4. When prompted to verify your printer is ready, select your print criteria.

Chapter 32 Data Utilities

The Marketing module has utilities you can use to manage your marketing files. You access these utilities by clicking **Setup & Data Utilities** on the Marketing menu, which opens the Setup/Customer Data Utilities menu. You already used the **Compose Letters** button to create customer letters. The remaining buttons display the utilities. To use a utility, click the button that corresponds to the utility you want to use, and follow the prompts on your screen.
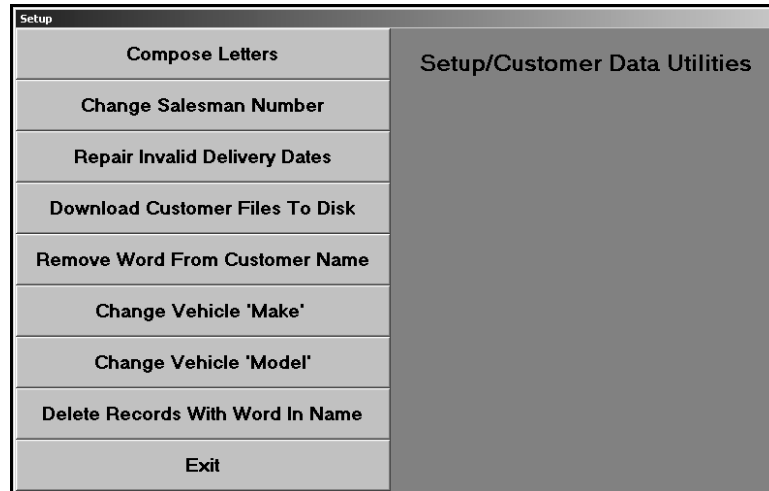
Important: Since the utilities affect the files in the master customer database, make sure you know exactly what each utility does before you use it. If you are unsure of how a utility will affect the files, call the Autosoft Support Desk at (800) 473-4630 for assistance.

Change Salesman Number

This utility allows you to change the salesperson's number in the customer files to a new salesperson's number. You would use this utility, for example, if your dealership lost a salesperson and wants to make another salesperson responsible for the old salesperson's clients.

1. Click **Change Salesman Number**.

2. In **From Salesman**, type the original salesperson's ID number, or select the salesperson from the drop-down list.

3. In **To Salesman**, type the new salesperson's number, or select the salesperson from the drop-down list.

4. Click **OK** when prompted to verify you want to execute the change.

5. The system scans the files. This may take several minutes. When the system is finished scanning, it displays a message indicating the total number of files it changed. Click **OK** to acknowledge the message.

Repair Invalid Delivery Dates

Use this utility to repair any invalid delivery dates. The system scans the customer records and replaces any blank or corrupted delivery dates with the date "01/01/90."

1. Click **Repair Invalid Delivery Dates**.

2. Click **OK** when prompted to verify you want to execute the change.

3. The system scans the files. This may take several minutes.

4. When it is finished, it displays a message indicating the total number of files scanned. Click **OK** to acknowledge the message.

Once you run this utility, you can print a list of customers who have the replacement delivery date from the Compile Marketing Lists menu.

1. Click **Exit** on the Setup/Customer Data Utilities menu to return to the Marketing main menu.

2. Click **Compile Marketing List**.

3. Click **All Deliveries**.

4. Type **A** to include all deliveries.

5. Type **01/01/1990** for both the beginning and ending dates for the search. The system will add all of the customers with the generic 01/01/1990 date to the list.

6. Click **OK** to compile the list. The system scans the files. This may take several minutes.

7. Click **OK** when the system prompts you with the number of customers on the compiled list.

8. Click **Exit** close the compile menu.

9. Click **Print From Compiled List**.

10. Click **Print Long List** or **Print Short List**. Both lists provide the customer's name and phone number, which you can use to search for the customer's file; however, the long list includes the last eight digits of the VIN, which you can also use to recall customers' files.

11. Select your print criteria.

12. Use the list to edit the customer files as needed. You can edit the delivery dates using the **View Customer History** button on the Marketing menu.

Download Customer Files To Disk

This utility allows you to download customer files to a disk. This *is not* the same option available on the Compile Marketing List menu. Downloading on that menu only downloads the customers from the compiled marketing list. This utility downloads *all* of the customer files in the customer database. Since you can only download the files to a floppy disk and are limited to the space on the disk, you may not be able to use this utility unless you are a small dealership with a small customer database.

1. Click **Download Customer Files To Disk**.

2. When prompted to select the format, type **F** for flat ASCII or **C** for comma delimited file. (Comma delimited is the format commonly required by vendors.)

3. Verify there is a formatted disk in drive A, and click **OK**.

4. Click **OK** when prompted to verify you want to execute the download.

Remove Word From Customer Name

Use this utility to remove an unwanted word or string of characters from the **Name** field in the customer files.

1. Click **Remove Word From Customer Name**.

2. Type the text you want to remove, and press TAB or ENTER.

3. Click **OK** when prompted to verify you want to execute the change.

4. The system scans the files. This may take several minutes. When the system is finished scanning, it displays a message indicating the total number of files it changed. Click **OK** to acknowledge the message.

Change Vehicle 'Make'

This utility allows you to change the make of a vehicle in the customer files. This is useful to correct spelling errors.

1. Click **Change Vehicle 'Make.'**

2. Type the original make and the new make.

3. Press TAB or ENTER to continue as needed.

4. Click **OK** when prompted to verify you want to execute the change.

5. The system scans the files. This may take several minutes. When the system is finished scanning, it displays a message indicating the total number of files it changed. Click **OK** to acknowledge the message.

Change Vehicle 'Model'

Use this utility to change the model of a vehicle in the customer files. This is useful to correct spelling errors.

1. Click Change **Vehicle 'Model'**.

2. Type the original model and the new model.

3. Press TAB or ENTER to continue as needed.

4. Click **OK** when prompted to verify you want to execute the change.

5. The system scans the files. This may take several minutes. When the system is finished scanning, it displays a message indicating the total number of files it changed. Click **OK** to acknowledge the message.

Delete Records With Word In Name

This utility allows you to find all the files that contain a specific word in the Name field. The system displays a list of files that meet your search criteria, and you can select which files you want to delete. This is useful when you need to delete dealer trades or wholesale sales that were processed incorrectly.

1. Click **Delete Records With Word In Name**.

2. Type the word, and press TAB or ENTER.

3. Click **OK** when prompted to verify you want to execute the search.

4. The system scans the files. When it is finished, it displays a message indicating the total number of files that meet the criteria you entered. Click **OK** to acknowledge the message.

5. The screen displays a list of the records. Use the checkbox next to each record to indicate if you want to include or exclude a record from the list of records you want to delete. Click to select a box. Click a selected box to clear it. A checkmark indicates the record will be deleted, and an empty box indicates you want to keep the record.

6. When you are ready, click **Remove Selected Records** (or click **Cancel** to close the list without taking any action).

7. Click **OK** when prompted to verify you want to delete the records.

8. The system displays a message indicating it deleted the records. Click **OK** to acknowledge the message.

Conclusion

This completes the instructions for using the Sales Management modules. Refer to this manual whenever you want to use any of the four modules. If you have a question and cannot find the information you are looking for in this manual of on the help pages, feel free to call Autosoft International at (800) 473-4630 to speak with a Support Desk representative.