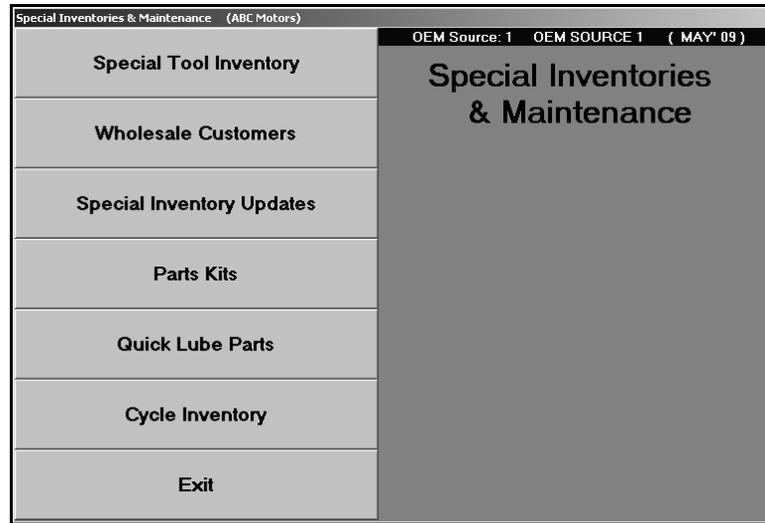


Chapter 14 Special Inventories

The **Special Inventories** button on the Autosoft FLEX DMS main menu opens the Special Inventories & Maintenance menu. This menu is used to manage special inventories and to perform special inventory updates.



Note: Chapter 5 covered the **Wholesale Customers** option. Chapter 8 covered the **Parts Kits** option. Chapter 13 covered the **Cycle Inventory** option.

Special Tool Inventory

This button advances you to the Special Tool Inventory menu. This menu is used to track tools. Once you enter tools into the system, you can use this menu to sign tools in and out, and the system will track to whom the part was issued and the date the part was issued. This helps you keep track of the tools.



Enter Tools

Use this button to open the Special Tool Inventory screen. This screen is used to add tools to the system. Tools can then be tracked using the **Issue Tool** and **Return Tool** buttons on the Special Tool Inventory menu. As tools are signed in and out, the system updates the **Current Out** and **Previous Out** fields so you can view who has the tool checked out and who had the tool checked out previously.



Adding a New Tool

1. Click **Enter Tool**. The Special Tool Inventory screen appears.
2. Use the **Tool Number** field to assign the tool an ID. This field accepts up to 15 alphanumeric characters. The tool number should be an entry that easily identifies the tool.
3. Type a description of the tool in the **Desc.** field.
4. In **Location**, identify where the tool is located.
5. In **Quantity**, type the quantity of this tool the dealership has.
6. In **Cost**, type the cost for each tool.
7. As tools are issued, the fields in the bottom-right corner of the screen are automatically updated.

The **Previous Out** field displays the name of the person who previously had the tool signed out, and the **Returned** field identifies when this individual returned the tool.

The **Current Out** field displays the name of the person who last signed out the tool, and the **Issued** field displays the date the tool was issued to this individual.

8. Click **Save** to save the information. The tool will appear in the list on the right side of the screen.

Editing a Tool's File

1. Type the tool number in the **Tool Number** field, or click the tool in the list on the right side of the screen.
2. The tool's information fills in on the screen.
3. Click in a field, and edit the information as needed.
4. Click **Save** to save the changes.

Deleting a Tool

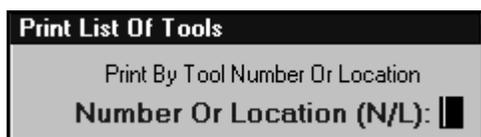
1. Select the tool.
2. Click **Delete**.
3. Click **OK** when prompted to verify you want to delete the record.

Tip: Use the **Details** button to view an overview of the inventory, including the Current Out and Previous Out information.

Print List of Tools

Use this button to print a list of the tools entered in the tool inventory. For each tool, the printout lists the tool number, description, and location. It also identifies who currently has the tool signed out and the last person to sign out the tool and the return date. Finally, the printout lists the cost per tool and the total inventory value for each tool (based on the quantity of each tool the dealership has). The end of the printout identifies the total value of your tool inventory.

1. Click **Print List of Tools**.
2. Specify if you want the report to list the tools in order based on tool number or location. Type **N** for number or **L** for location.



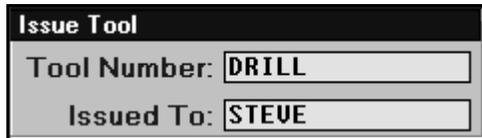
Print List Of Tools
Print By Tool Number Or Location
Number Or Location (N/L):

3. When prompted to verify your printer is ready, click to select **To Printer** to print the information or **To Screen** to view the information on your screen.
4. Once you select your print type, click **Print**.

Issue Tool

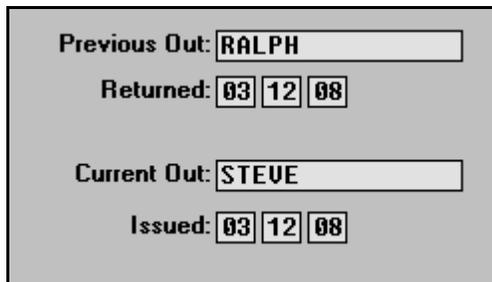
Use this button to sign out a tool.

1. Click **Issue Tool**.
2. Type the tool number, and press ENTER.
3. Type the name of the person using the tool.



Issue Tool
Tool Number: DRILL
Issued To: STEVE

4. Click **OK** when prompted to verify you want to log the tool out.
5. The **Current Out** field on the Special Tool Inventory screen will display the individual's name who signed the tool out and the date the tool was issued.

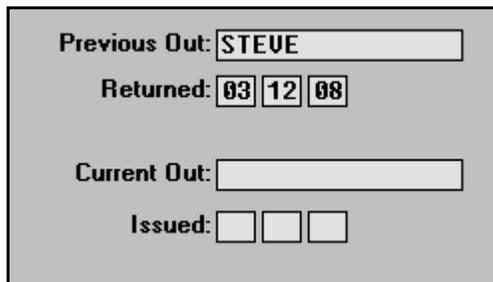


Previous Out: RALPH
Returned: 03 12 08
Current Out: STEVE
Issued: 03 12 08

Return Tool

Use this button to sign in a tool when it is done being used.

1. Click **Return Tool**.
2. Type the tool number, and press ENTER.
3. Click **OK** when prompted to verify you want to log the tool in.
4. The individual's name is transferred from the **Current Out** to the **Previous Out** field on the Special Tool Inventory screen, and the **Returned** field displays the date the tool was returned.



Previous Out:

Returned:

Current Out:

Issued:

View Tool List

Use this button to view a list of the tools in your tool inventory. For each tool, the list displays the tool number, description, location, quantity, and cost per tool. It also identifies who currently has the tool signed out and the last person to sign out the tool and the return date.

List						
CREST0	CRESCENT WRENCH 10	Current Out:	/ /	CAB1 DRW1	5	12.98
		Returned:	03/12/08			
CREST12	CRESCENT WRENCH 12	Current Out:	/ /	CAB1 DRW1	5	18.72
		Returned:	03/12/08			
CREST15	CRESCENT WRENCH 15	Current Out:	/ /	CAB1 DRW1	5	29.57
		Returned:	03/12/08			
DRILL	DRILL	Current Out:	/ /	CAB3 DRW1	3	57.98
		Returned:	03/12/08			
ELC SCREWDRIIVER	ELECTRIC SCREWDRIIVER	Current Out:	/ /	CAB3 DRW4	3	57.05
		Returned:	/ /			
SCREWDRIIVER-F	FLATHEAD SCREWDRIIVER	Current Out:	/ /	CAB2 DRW1	12	3.32
		Returned:	/ /			
SCREWDRIIVER-P	PHILLIPS SCREWDRIIVER	Current Out:	03/12/08	CAB2 DRW1	12	3.32
		Returned:	/ /			

Close

Special Inventory Updates

This button advances you to the Special Inventory Updates menu. You use this menu to enter special inventory update information and to update the information to the Master Inventory. This helps you ensure that part records retain certain information. For example, the price tape update for the month may update various pieces of information for a part. If you do not want a part's record updated, you can use this feature to ensure the part's record retains the information you specify.

The screenshot shows a menu titled "Special Inventory Updates (ABC Motors)" for "OEM Source 1". The menu contains four options: "Enter Special Parts Data", "Update Parts Data To Master Inventory", "Print Proof List For Source", and "Exit".

Enter Special Parts Data

Use this button to enter the update information. Only the information you enter on this screen is updated. If you skip fields, the information for those fields is automatically filled in by the information available on the price tape. You can pull the tape data to this screen to view the available information and edit the information as needed for the update.

The screenshot shows the "Enter Inventory Update Data" screen for "OEM Source 1". The screen contains a text box with the instruction: "Enter ONLY those fields that you desire to update. Fields that are BLANK will default to the data from the OEM Master Tape." Below this are several input fields:

- Part: 12490147
- Desc: FILTER
- Source: 1
- Change To: []
- From: []
- List: []
- Trade: []
- Cost: 2.37
- Core: []
- Alt Cost: []
- Comp: []
- Group: 01836
- Order Code: 6
- Return Code: N
- Part/Assec: []

At the bottom of the screen are five buttons: "Exit", "List", "Tape Data", "Delete", and "Save".

Adding a Part to the Update List

1. Click **Enter Special Parts Data**. The Enter Inventory Update Data screen appears.
2. In **Part**, type the part number for the part you want to update.
3. The **Desc.**, and **Source** fields automatically fill in.
4. Enter information only in the fields you want to update, or click **Tape Data** to fill in the fields with the information from the current price tape.
5. Use the **Change To** and **From** fields to change the part number. Type the new number in **Change To** and the old number in **From**.
6. Use the price fields to update the List, Trade, Cost, Alternate Cost, and Wholesale Compensation prices.
7. Use the **Group** field to update the group or base number for the part.
8. If you need to update the **Order Code** or **Return Code**, type the new code in the appropriate field.
9. Use the **Part/Assec** field to update the part/accessory indicator. Type **P** for part or **A** for accessory.
10. Click **Save** to save the information entered.

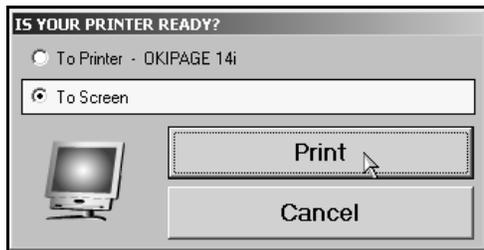
Viewing and Editing a File from the Update List

1. Click **List** on the bottom of the Enter Inventory Update Data screen.
2. A list of the parts you entered on this screen appears.
3. Click the part you want to view.
4. The part's information fills in on the screen.
5. Click in a field, and edit the necessary fields.
6. Click **Save**.

Print Proof List For Source

Use this button to print a list of the parts that will be updated. You should print this list before running the update so you can verify the parts that will be updated. The printout lists the part number and description for each part that will be updated.

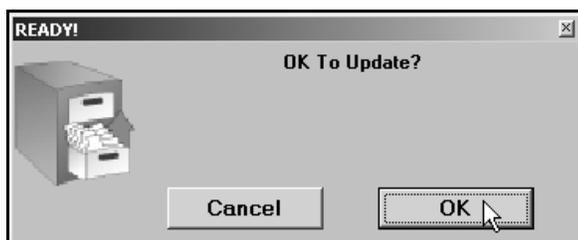
1. Click **Print Proof List For Source**.
2. When prompted to verify your printer is ready, select **To Printer** to print the information or **To Screen** to view the information on your screen.
3. Once you select your print type, click **Print**.



Update Parts Data To Master Inventory

Use this button to update the part information to the Master Inventory. You should print the proof list to verify the parts on the update list before running the update. If you find errors, use the **Enter Special Parts Data** button to edit the part information as needed. If there are errors and you update the information, you will have to manually edit the information in the Master Inventory file.

1. Click **Update Parts Data To Master Inventory**.
2. Click **OK** when prompted to verify you want to update the parts.



Quick Lube Parts

You use this screen to create a quick lube parts database. When a repair order is flagged "Q" for quick lube, you can add these parts to the repair order on the Close Parts screen using the **QL Parts** button.

Part	Qty	Cost	List	Description
25010792	22	3.18	6.50	OIL FILT
25011520	25	3.18	6.50	OIL FILT
25012305	25	2.78	6.50	OIL FILT
25014748	25	3.25	6.50	OIL FILT
25162816	25	2.83	6.50	OIL FILT
25171377	25	3.18	6.50	OIL FILT
25324052	25	3.23	6.50	OIL FILT
4105409	24	3.95	6.95	OIL FILT

Part: 5281090
 Desc: OIL FILTER
 On Hand: 18
 Cost: 3.95
 List: 6.95
 Internal: 5.95
 Allow Price Change: N

Exit Print List Delete Part Save

Adding a Part

1. Click **Quick Lube Parts**. The Quick Lube Parts Inventory screen appears.
2. In **Part**, type the part number.
3. Type a description of the part in **Desc**.
4. In **On Hand**, type the quantity of the part in your inventory.
5. Type the cost, list, and internal for the part.
6. Use the **Allow Price Change** field to indicate if the Service Department should be restricted from making pricing changes. Type **Y** for yes or **N** for no. This is the same parameter that can be set on the R/O Lubricant Descriptions and Pricing screen, but the parameter on this screen allows restrictions to be set for individual quick lube parts.
7. Click **Save** to save the part. It appears in the list on the right side of the screen.

Editing a Part

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

Deleting a Part

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

Printing the List

When you are finished adding the quick lube parts, you may want to print the list so you can reference it as needed.

1. Click **Print List** to print the parts list.
2. When prompted to verify your printer is ready, 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**.

