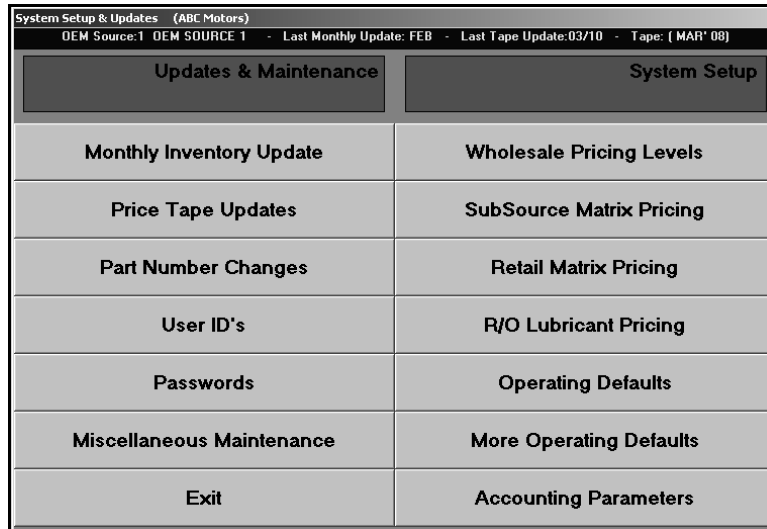


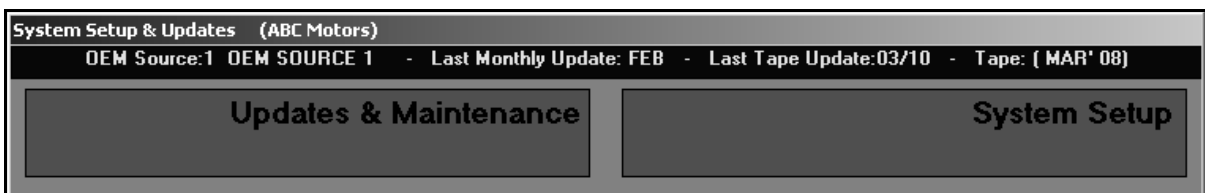
Chapter 15 Updates & Maintenance

The System Setup & Updates menu is divided into two parts. The left side of the menu is for updates and maintenance. Once you enter your inventory, you will use this side of the menu to run periodic updates and monthly maintenance. The right side of the menu is used to enter the System Setup parameters. For information on entering System Setup information, see Chapter 1.



Status Line

The System Setup & Updates menu has a status line under the title bar. This status line provides quick information about the inventory updates and price tape information. It displays four pieces of information:



- **OEM Source:** This is the current inventory source. You can change the inventory source by pressing the F5 key, and clicking on the inventory source you want to select.
- **Last Monthly Update:** This is the month that the last monthly update was performed.
- **Last Tape Update:** This is the month and day that the last price tape update was performed. See Chapter 3 for instructions on running the price tape update.
- **Tape:** This is the month and year for the current price tape.

Monthly Inventory Update

Use this button to open the Monthly Inventory Maintenance screen. This screen is used to perform month-end maintenance. The monthly maintenance serves two purposes. First, it sets the sales history fields to zero for the new month so the year's history does not add to the last year's history.

Second, it removes the records for any dormant parts in your active inventory. Dormant parts are parts with no on-hand quantity that have had no restock, sales, or lost sales for the last 12 months. The system uses the phase out parameters entered in the System Setup to determine the parts that should be deleted. The record for any part that is involved in a chain of suppression is preserved as long as there is at least one part in the chain with an on-hand quantity greater than zero.

You only need to run the monthly inventory maintenance once to update all of the inventory sources, regardless of the current source selected. Do not perform the monthly inventory maintenance more than once in any given month. Running the maintenance more than once may result in the loss of sales history for the current month in both the inventory and report files.

Before you run the maintenance, you must pull all of your monthly reports. This ensures you have information for the parts that may be deleted during the maintenance. All of the other workstations must be out of the Parts Inventory program when you run the update.

Monthly Inventory Maintenance (ABC Motors)

Monthly Inventory Maintenance

A degree of maintenance is required to ensure that the inventory data is current and accurate. All desired reports must be pulled prior to the monthly update. Parts with no activity and no on-hand stock will be dropped from the active inventory in accordance with your phase out parameters.

Set Minus (-) On Hand Quantities To Zero If Not Found On A PO (Y/N): Y

Update 'On Order' and 'Back Order' Notations From PO's (Y/N): Y

Monthly Inventory Update - Month Ending:

WARNING: All Other Parts Stations Must Be At the Desktop.

Exit

1. Click **Monthly Inventory Update**. The Monthly Inventory Maintenance screen appears.
2. In **Set Minus (-) On Hand Quantities To Zero If Not Found On A PO {Y/N}**, indicate if you want to set the negative on-hand quantities to zero if they are not found on a purchase order. Type **Y** for yes or **N** for no.

N is recommended if you have negative on-hand quantities for parts that you will be restocking through manual resupply.

Y is recommended when you have parts that you sold but will not be restocking through a purchase order. If you select **Y**, a message appears warning you to print a list of these parts for reference. Click **OK** to acknowledge the message. (You can print the list by selecting the **List Parts With Less Than Zero In Stock** option on the Inventory Reports menu.)

3. In **Update 'On Order' and 'Back Order' Notations From PO's**, indicate if you want to update the on-order and back-order information from the purchase order. Type **Y** for yes or **N** for no. **N** is recommended if you want to preserve any manual entries to these fields in the Master Inventory for parts that have been ordered but would not be found on any purchase order.
4. The **Monthly Inventory Update—Month Ending** field defaults to a month based on the last update. If the month is not correct, type the correct month.
5. Press ENTER to begin the maintenance.
6. The system displays a reminder that you should have printed all of the month-end reports before performing the monthly maintenance. Click **OK** to acknowledge the message.
7. Click **OK** when prompted to verify you want to update the files.
8. The system will run through the maintenance. The **Source** fields indicate which source is currently being updated. As each source is being updated, the corresponding field will display information. The **Process** field displays the update process. You will see the system work through the files.
9. The system displays a "Did That" message when the maintenance is complete. Click **OK** to acknowledge the message.
10. The system returns you to the ASI DMS main menu.

Part Number Changes

This button advances you to the Part Number Changes menu. This menu is used to process supersession information. The first three options allow you to manually flag supersessions. These selections are used between parts pricing updates. You will use bulletins or other notices to make the part number changes.

Part Number Change (ABC Motors)	OEM Source 1
Index Number Changes Only	Part Number Change
Move History ONLY To New Number	
Move ALL Data To New Number	
Move ALL Data From Changes On Last Tape	
List All Changed Numbers In Inventory	
Exit	

Index Number Changes Only

Use this button to index a change and maintain the stock and sales history under the old number until that stock is exhausted.

11. Click **Index Number Changes Only**.
12. Type the old and new part number, and press ENTER. The part information is displayed in the top five fields.
13. The **Set 'From' Part Stock Status To** field determines the stocking status for the part in the **From** field. It defaults to **C** for changed part number. You can leave this entry or edit it as needed. The stocking status can be **Y** if the part is normally stocked, **N** if the part is not normally stocked, **S** if the part is a special order part, **C** if the part number has changed, or **R** if the part has been returned within the last year.

Index Number Changes Only

Part: 10424943

Stock As: 10341214

Name: MOTOR

Bin:

Current Stock:

Change From Part No: 10424943

To Part No: 10341214

Set 'From' Part Stock Status To: C

14. Click **OK** when prompted to verify you want to change the number.

Move History ONLY To New Number

Use this button to move the sales history to the new number. The stocking status, bin location, and all other pertinent data except the on-hand quantity is moved to the new part number. The on-hand quantity for the part at the time of the move is retained under the old part number. This allows you to stock under both numbers.

1. Click **Move History ONLY To New Number**.
2. Type the old and new part number, and press ENTER. The part information is displayed in the top five fields.
3. The **Set 'From' Part Stock Status To** field determines the stocking status for the part in the **From** field. It defaults to **C** for changed part number. You can leave this entry or edit it as needed. The stocking status can be **Y** if the part is normally stocked, **N** if the part is not normally stocked, **S** if the part is a special order part, **C** if the part number has changed, or **R** if the part has been returned within the last year.
4. Click **OK** when prompted to verify you want to change the number.

Move ALL Data To New Number

Use this button to move all of the part data to the new number and to index the change. The on-hand quantity, sales figures, and lost sales figures are merged to the new part number. The bin number for the old part will be preserved.

1. Click **Move ALL Data To New Number**.
2. Type the old and new part number, and press ENTER.
3. The part information is displayed in the top five fields.
4. The **Set 'From' Part Stock Status To** field determines the stocking status for the part in the **From** field. It defaults to **C** for changed part number. You can leave this entry or edit it as needed. The stocking status can be **Y** if the part is normally stocked, **N** if the part is not normally stocked, **S** if the part is a special order part, **C** if the part number has changed, or **R** if the part has been returned within the last year.
5. Click **OK** when prompted to verify you want to change the number.

Move ALL Data From Changes On Last Tape

Use this button to move all of the part data for all of the part numbers that were changed using the most recent price tape.

1. Click **Move ALL Data From Changes On Last Tape**.
2. Click **OK** when prompted to verify you want to change the numbers.

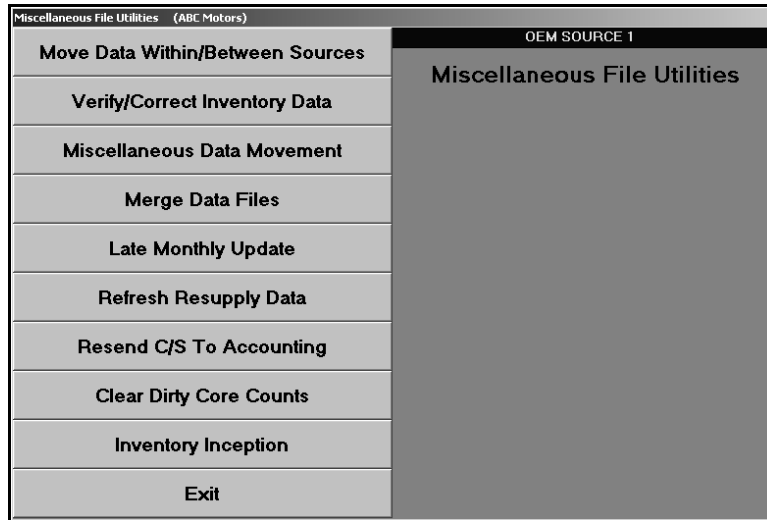
List All Changed Numbers in Inventory

Use this button to print a list of all of the parts in your inventory that have been superseded.

1. Click **List All Changed Numbers In Inventory**.
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**.

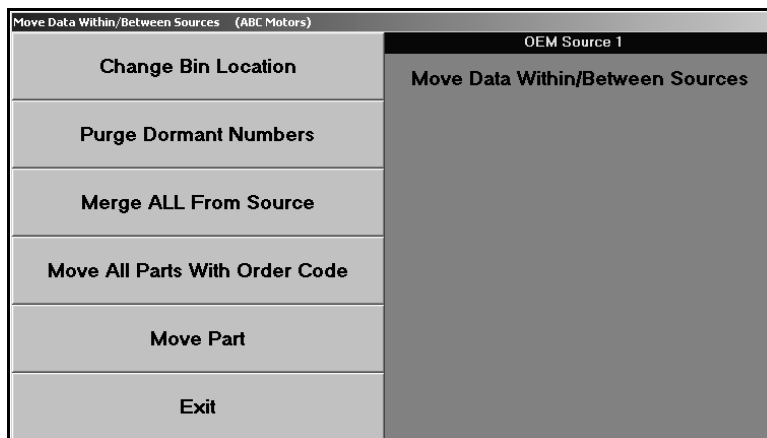
Miscellaneous Maintenance

This button advances you to the Miscellaneous File Utilities menu. This menu is used to run miscellaneous maintenance that is not performed regularly. The menu contains options that allow you to move data within or between sources, verify inventory data, merge data files, and perform a late inventory update.



Move Data Within/Between Sources

This button advances you to the Move Data Within/Between Sources menu. This menu is used to move batches of related data. This saves you time because you can move entire batches of inventory files without having to edit information in the Master Inventory file for each part.



Change Bin Location

Use this button to move all of the parts in one bin to another bin.

1. Click **Change Bin Location**.
2. Type the original bin number in **From Bin**.
3. Type the bin number where you want to move the parts in **To Bin**.
4. Click **OK** when prompted to verify you want to change the bin location.

Tip: If you leave the **From Bin** field blank and type SPO in the **To Bin** field, the system will move all the part numbers that are missing a bin to the SPO bin.

Purge Dormant Numbers

Use this button to remove part records for parts that have been dormant for a specified number of days. The system will print a list of the parts that were purged. For each part, the printout lists the part number, monthly sales for the last 12 months, on-hand quantity, cost, bin location, return code, model year, number of days since the last sale, and the number of days since the last stocking.

1. Click **Purge Dormant Numbers**.
2. Type the number of days without activity you want to use to purge the files.
3. When prompted to verify your printer is ready, select your print criteria.

Merge ALL From Source

Use this button to merge all of the parts from one inventory source to another inventory source. All of the other workstations must be out of the system before you can use this utility.

1. Click **Merge ALL From Source**.
2. Type the original source number in **From Source**.
3. Type the source number where you want to move the parts in **To Source**.
4. Click **OK** when prompted to verify you want to merge the sources.

Move All Parts With Order Code

Use this button to move all of the parts with a specific order code from one inventory source to another. This feature can be used to separate non-OEM parts into a completely separate source—providing you have assigned all of them the same order code.

1. Click **Move All Parts With Order Code**.
2. Type the order code for the parts in **Order Code**.
3. Type the original source number in **From Source**.
4. Type the source number where you want to move the parts in **To Source**.
5. Click **OK** when prompted to verify you want to switch the sources.

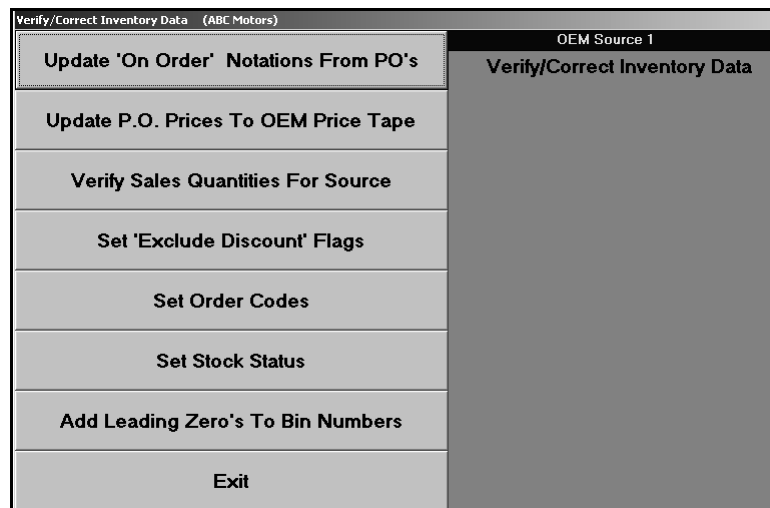
Move Part

Use this button to move a part from the current inventory source to another inventory source.

1. Click **Move Part**.
2. Type the part number in **Move Part**.
3. Type the source number where you want to move the part in **To Source**.
4. Click **OK** when prompted to verify you want to switch the sources.

Verify/Correct Inventory Data

This button advances you to the Verify/Correct Inventory Data menu. This menu is used change information that affects groups of inventory files.



Update 'On Order' Notations From PO's

Use this button to update the quantities in the **On Order** field on the Master inventory screen using information from all of the active purchase orders. This only affects the current inventory source.

1. Click **Update 'On Order' notations From PO's**.
2. Click **OK** when prompted to verify you want to update the files.

Update P.O. Prices To OEM Price Tape

Use this button to update the prices of the parts on the purchase orders using the price tape information.

1. Click **Update P.O. Prices To OEM Price Tape**.
2. Type the source you want to update in **For Source**.
3. Click **OK** when prompted to verify you want to update the files.

Verify Sales Quantities For Source

Use this button to verify sales quantities for a specific source.

1. Click **Verify Sales Quantities For Source**.
2. Type the source number in **For Source**.
3. Click **OK** to begin verifying the sales quantities.

Set 'Exclude Discount' Flags

Use this button to set the **Exclude From All Discounts** flag for a specific promotion code. The discount flag is found on the Supplemental Part Data screen in the Master Inventory file.

1. Click **Set 'Exclude Discount' Flags**.
2. Type **Y** for yes or **N** for no depending on the flag you want to set in **Set To 'Y' or 'N'**.
3. Type the promotion code for the parts you want the system to set with this flag in **For Promotion Code**.
4. Click **OK** when prompted to verify you want to update the files.

Set Order Codes

Use this button to replace an order code with another order code. Be sure that the new order code is a letter that the resupply program recognizes.

1. Click **Set Order Codes**.
2. Type the original order code in **Set Code**.
3. Type the order code you want to replace the first code you entered in **To Code**.
4. Click **OK** when prompted to verify you want to update the files.

Set Stock Status

Use this button to replace a stocking status code with another stocking status code. Be sure that the new order code is a letter that the resupply program recognizes.

1. Click **Set Stock Status**.
2. Type the original stocking status code in **Set Status**.
3. Type the stocking status code you want to replace the first code you entered in **To Status**.
4. Click **OK** when prompted to verify you want to update the files.

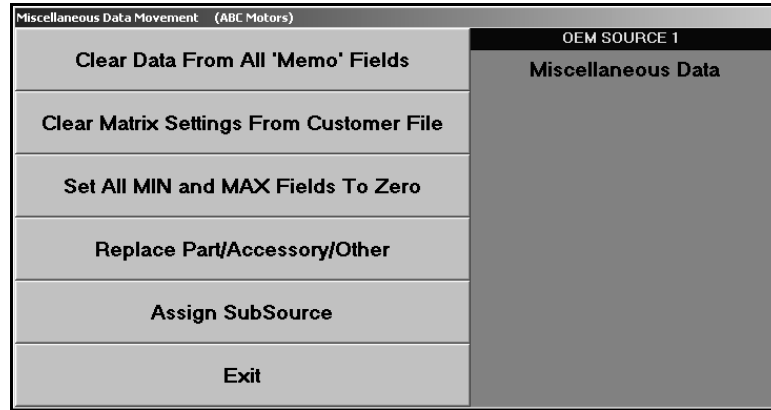
Add Leading 'Zeros' to Bin Numbers

Use this button to add a leading zero to all of the bin numbers. For example, this will change bin 11 to bin 011.

1. Click **Add Leading 'Zeros' to Bin Numbers**.
2. Click **OK** when prompted to verify you want to execute the change.

Miscellaneous Data Movement

This button advances you to the Miscellaneous Data Movement menu. This menu is used to clear data from inventory and customer files. Verify you are in the correct source. If you need to change the source, press F5 to display the OEM Parts Source list. Click the source you want to select.



Clear Data From All 'Memo' Fields

Use this button to clear all of the **Memo** fields on the Master Inventory screen for the current source.

1. Click **Clear Data From All 'Memo' Fields**.
2. Click **OK** when prompted to verify you want to clear the information.
3. The system displays a "Did That" message when it is finished. Click **OK** to acknowledge the message.

Clear Matrix Settings From Customer File

Use this button to clear all of the matrix settings from the wholesale customer files. Because this utility requires access to the customer files and may take several minutes to complete, you should only run this utility during off hours when the system is not being used.

1. Click **Clear Matrix Settings From Customer File**.
2. Click **OK** when prompted to verify you want to clear the information.
3. The system displays a warning indicating that the utility should only be run when system operation is minimized. Click **OK** to acknowledge the message.
4. The system displays a "Did That" message when it is finished. Click **OK** to acknowledge the message.

Set All MIN And MAX Fields To Zero

Use this button to set all of the **Min** and **Max** fields on the Master Inventory screen to zero. The changes will only affect the specified source. Some dealers set minimum and maximum levels to override sales history and force resupply orders for some or all parts, especially when there is little or no history available. If you want to generate suggested orders based on history rather than minimum and maximum levels, use this utility. However, you should first run a report of all your Min/Max entries. (See Chapter 12 for more information about reports.)

1. Click **Set All MIN And Max Fields To Zero**.
2. Type the inventory source in **For Source**.
3. Click **OK** when prompted to verify you want to change the value to zero.
4. The system displays a "Did That" message when it is finished. Click **OK** to acknowledge the message.

Replace Part/Accessory/Other

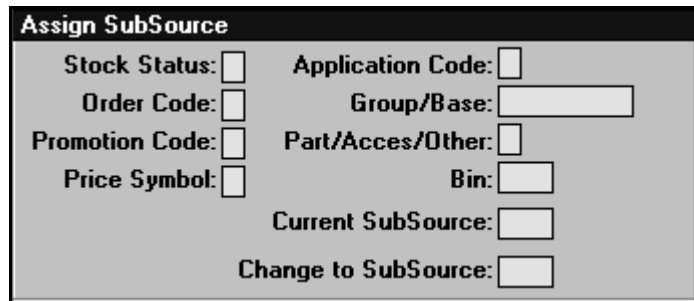
Use this button to change the flag in the **Part/Accessory/Other** field on the Supplemental Part Data screen in the Master Inventory files. The changes only affect the current source.

1. Click **Replace Part/Accessory/Other**.
2. Type the flag you want to replace in **From**.
3. Type the new flag you want to use in **To**.
4. Click **OK** when prompted to verify you want to change the flag.
5. The system displays a "Did That" message when it is finished. Click **OK** to acknowledge the message.

Assign Subsource

If you use subsource management, you can use this utility to assign parts to a subsource without having to manually edit the part file. This will be useful as you create subsources and need to move parts between subsources. A part must meet all of the criteria you specify in order to be assigned to the subsource. When the transfer is complete, the system will print a report. The printout will show all the parts that qualified to be changed. If the part line displays *** on the far right, the part was moved from one subsource to the new subsource. If the part line does not display ***, the part qualified for the move but was already in the specified subsource.

1. Click **Assign Subsource**.
2. Specify the criteria a part must meet to be assigned the subsource. Only parts that meet *all of the criteria you specify* will be assigned the subsource.



The screenshot shows a dialog box titled "Assign SubSource" with a dark header. The dialog contains several input fields for specifying criteria:

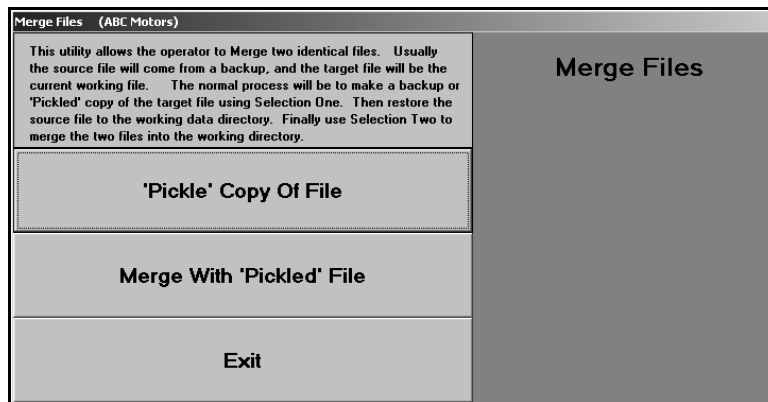
Stock Status:	<input type="checkbox"/>	Application Code:	<input type="checkbox"/>
Order Code:	<input type="checkbox"/>	Group/Base:	<input type="text"/>
Promotion Code:	<input type="checkbox"/>	Part/Access/Other:	<input type="checkbox"/>
Price Symbol:	<input type="checkbox"/>	Bin:	<input type="text"/>
		Current SubSource:	<input type="text"/>
		Change to SubSource:	<input type="text"/>

3. Type the subsource.
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**.

Merge Data Files

This button advances you to the Merge Files menu. This menu is used to merge two identical files. This is done to fix files that may be corrupt. This is a two-stage process. First, you will make a backup copy of the target file using the first menu option. Second, you will merge the backup copy and the working copy of the file into the working directory. Once the files have been merged, you should verify that the merge fixed the problem you were having.

Important: Do not use this feature without assistance from an Autosoft Support Desk representative. Call support at (800) 473-4630 for assistance.



'Pickle' Copy Of File

Use this button to make a backup copy of the target file. This is the first step in the merging process.

1. Click **'Pickle' Copy Of File**.
2. Type the file name.
3. Click **OK** when prompted to verify you want to pickle the file.
4. The system prompts you when it is finished pickling the file and reminds you to restore the target file. Click **OK** to acknowledge the message.

Merge With 'Pickled' File

Use this button to merge the two files into the working directory. This is the second step in the merging process. Once the merge is complete, you should check the data to ensure that everything is accurate.

1. Click **Merge 'Pickled' File**.
2. Type the file name.
3. Click **OK** when prompted to verify you want to merge the files.
4. The system will prompt you when it is finished merging the files. Click **OK** to acknowledge the message.

Late Monthly Update

Use this button to run a late monthly update. Only the current inventory source is updated. If you need to update more than one source, press F5 to select the source. Run the updates for each source as needed.

1. Click **Late Monthly Update**.
2. Type the appropriate month-ending date in For Month Ending. Type the date in an eight-character format with or without slashes (mmddyyyy or mm/dd/yyyy). If you do not use slashes, press ENTER to continue.
3. Click **Update** when prompted to verify you want to run the update.
4. The system displays a reminder that only the current source has been updated. Click **OK** to acknowledge the message.

Refresh Resupply Data

Use this button to refresh the resupply data. You would use this utility if you have updated your resupply list, but some of your "Last Stock" dates in the Master Inventory file don't reflect the most recent stock date. The utility will use the last resupply list updated and update the "Last Stock" date accordingly.

Important: Do not use this feature without assistance from an Autosoft Support Desk Representative. Call support at (800) 473-4630 for assistance.

Resend C/S To Accounting

Use this button to resend counter slips to Accounting. You specify the document number or range of documents for the counter slips, and all slips within the range you specify will be sent to Accounting, even if they were already sent. If a counter slip number does not exist in the general ledger, the system will add the counter slip. If a counter slip number exists in the general ledger, the system will replace the existing document with the one in the most recent update. Therefore, you should notify Accounting when you use this utility so the operator can verify the counter slip numbers in the Integrated Parts Sales Entries before posting to the general ledger.

Important: Do not use this feature without assistance from an Autosoft Support Desk Representative. Call support at (800) 473-4630 for assistance.

Clear Dirty Core Counts

Use this button to clear the dirty core counts. This may be useful if your dirty core counts become incorrect due to manual tracking of dirty cores. This utility will clear all dirty core counts. You should print the Dirty Cores In Stock report (on the Inventory Value Reports menu) to identify the dirty cores in stock before running this utility. This will help you add any dirty cores back in to the inventory as needed.

1. Click **Clear Dirty Core Count**.
2. The system prompts you that you should print the Dirty Core report first. Click **OK** to acknowledge the message.
3. When the system is finished, it displays a "Did That" message. Click **OK** to acknowledge the message.