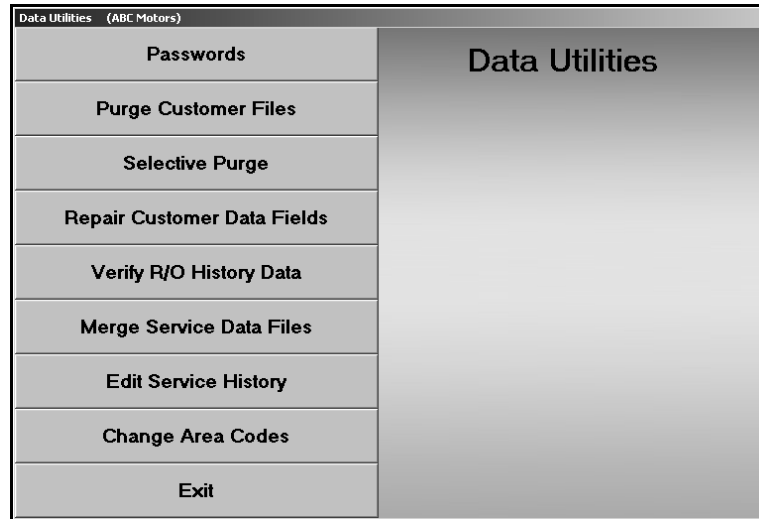# Chapter 12 Data Utilities

The Data Utilities button on the System Setup menu advances you to the Data Utilities menu. This menu is used to set up the passwords for the Service Writing module and to run maintenance on files. If you are unsure about the effects a utility will have on your system, please call the Autosoft support desk and speak with a support specialist.

Accessing the Data Utilities Menu

1. Click **System Setup** on the Service Writing main menu.

2. Click **Passwords & Data Utilities** on the System Setup menu. The Data Utilities menu appears.

> **Tip:** Passwords were covered in Chapter 1 System Setup. Please refer to that chapter for information on using passwords.

Purge Customer Files

Use this button to delete customers that have been inactive for a specified amount of time. This utility only affects customers who have no last service date or that have a last service date prior to the date you specify. If there is no last service date, the system uses the delivery date for the purge. This utility does not affect delivery customers who have a "D" in the **Active/Inactive** field on the Customer Information screen.

Autosoft recommends that you perform a daily backup immediately before using this utility. All users must be out of the Autosoft DMS program during the daily backup. If you are trying to remove customers with a certain word in their name, use the Delete Records with Word in Name utility in the Marketing module (from the Autosoft DMS main menu).

> **Warning:** Autosoft recommends that you run this utility on the server. All users must be out of the Autosoft DMS system while the utility is running. This utility permanently deletes the dormant customer files. Make sure you want to complete this exact task before you continue. Keep a record of the date you perform the purge in case you need to run the "undo" utility.

1. Click **Purge Customer Files**. The Purge Dormant Customers screen appears.

2. By default, the **Retain ALL New** box is selected. This will ensure that all customer files for new vehicles sold at your dealership will be retained in the system regardless of inactivity. Autosoft recommends that you always leave this field selected.

3. Type the date you want to use to purge records, and press ENTER if needed. This field defaults to two years prior to the current date. Customer records that have been inactive *since before this date* will be deleted from the system.

4. Click **OK** when prompted to verify you want to purge the records.

5. When the system is finished purging the files, it displays a "Did That" message indicating the number of records scanned, the number of records deleted, and the number of records skipped. Click **OK** to acknowledge the message.

Undoing the Last Purge

If necessary, you can reverse the last customer purge that was performed. The system holds the files from the last purge, and when you run the "undo" utility, the system restores the purged files back into the system files.

1. Click **Purge Customer Files**. The Purge Dormant Customers screen appears.

2. Click **Undo Last Purge**.

3. The system displays a prompt indicating when the last purge was performed. Verify that this is the correct date, and click **OK**.

4. When the system is finished restoring the files, it displays a "Did That" message indicating the number of records that were restored. Click **OK** to acknowledge the message.

Selective Purge

Use this button to remove customer records for dealer trades and wholesale customers that were processed incorrectly.

1. Click **Selective Purge**.

2. Type the criteria you want to use to find the files, and press ENTER.

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

4. The system will prompt you when the scan is complete and identify the total number of files found. Click **OK** to acknowledge the message.

5. The list of records is displayed on the screen. Use the check box next to each record to indicate if you want to include or exclude the record from the list to be deleted. A check mark will include the record. Click a checked box to clear the check mark. A blank box means the record will not be deleted.

6. Click **Remove Selected Record**.

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

8. The system prompts you that the selected records have been removed. Click **OK** to acknowledge the message.

Repair Customer Data Files

The **Repair Customer Data Fields** button is used to correct "numeric only" fields that have alpha characters entered in them. Numeric fields are intended for information such as dates, odometer readings, quantities, dollar amounts, and so on. If you receive a "Bad Data In Field" error, one of your files may have been corrupted and now contains incompatible or unrecognizable data in fields that require only numeric entries. This utility can be used to attempt to correct the data files. For security reasons, this feature requires a password.

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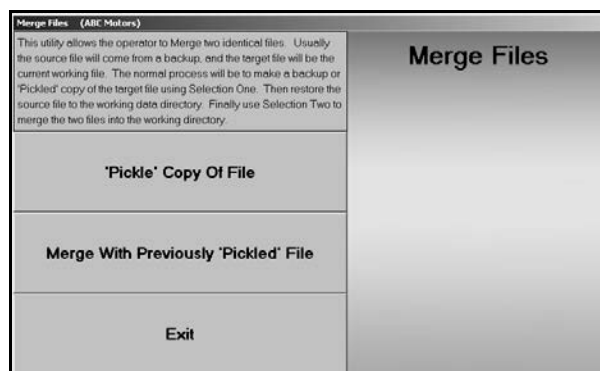
Verify R/O History Data

Use this utility to verify the R/O history data in your system. The system will scan the data and correct any corrupted history files.

1. Click **Verify R/O History Data**.

2. Click **OK** when prompted to begin the scan.

3. When the system is finished verifying the files, it displays a "Did That" message indicating the number of records it corrected. Click **OK** to acknowledge the message.

Merge Service Data Files

This button advances you to the Merge Files menu. With the help of an Autosoft Support Desk Representative, you can use the Merge Files menu to merge two identical files 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. When you are finished, click **Exit** to return to the Data Utilities menu.

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 merging the files.

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 will prompt you when it is finished pickling the file. Click **OK** to acknowledge the message.

Merge With 'Pickled' File

Use this button to merge the two files into the working directory.

1. Click **Merge With '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.

Edit Service History

Use this button to open the Enter/Edit Customer Service History screen to edit service files. You can also use this screen to delete a repair order from a customer's history. The information you edit on this screen changes the service history in the Customer Information file, but it does not affect the information in the Repair Order History. In addition, the repair order summary in the customer's history will not reflect the changes since this is a snapshot of the repair order at the time it was closed and updated.

Editing a Record

1. Click **Edit Service History**. The Enter/Edit Customer Service History screen appears.

2. Type the last eight digits of the vehicle's VIN.

   You can also search for a customer by clicking **Search**. Type the first three letters of the customer's last name, the last four digits of the customer's phone number, 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.

3. The **VIN**, **Year**, and **Make** fields automatically fill in.

4. Click **List** to display the service history for the selected vehicle. Click the service date you want to select. The repair order information fills in on the fields on the right part of the screen.

5. Enter or edit the information as needed.

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

Deleting a Service Record

A password is required to delete a repair order from history. This security feature ensures only authorized personnel can delete files.

1. Select the customer.

2. Click **List** to select the service date.

3. Click **Delete**.

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

5. Type the password.

Change Area Codes

Use this button to change an area code for selected exchanges. You can only select eight exchanges at a time, so if more exchanges need to be edited, you will have to repeat the process until all of the exchanges have been edited as needed.

1. Click **Change Area Codes**.

2. In **From Area**, type the *original* area code, and in **To Area**, type the *new* area code.

3. Next, type all of the exchanges that will use the new area code. If necessary, press ENTER to advance through any blank fields.

4. Click **OK** when prompted to verify you want to change the area code. All of the Service customer records with the selected exchanges will be edited to include the new area code.