



Autosoft
FLEXTM
DMS
Toyota Integrations

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Introduction to Autosoft Toyota Integrations

Autosoft DMS provides real-time integration with the Toyota Dealer Daily. This means that information is shared instantly between your dealership and Toyota Motor Sales (TMS). Information is readily available on the Dealer Daily Website.

Integrations are available throughout the Autosoft system and affect the following areas:

Vehicle Inventory

- Vehicle Updates from Toyota
- Vehicle Updates to Toyota

Sales

- Retail Delivery Reporting
- Credit Contracts

Service

- Repair Order Submission
- Special Service Campaigns (SSC)
- Labor Operation Code Download
- Warranty Payments

Parts

- Parts Master
- Part Inventory Updates
- Parts Orders
- Part Shippers
- Parts Returns

This document covers each integration. Please refer to the appropriate section for information and instructions.

1. Inventory Updates from Toyota

1.1. Vehicle Updates from Toyota

Toyota Motor sales will send inventory adjustments to your Autosoft system daily. The information will include data for both new and used vehicles.

1.2. Purchasing Vehicles

Autosoft will communicate with Toyota Motor Sale (TMS) daily to pull inventory for both new and used vehicle inventories for your dealership. The system identifies the vehicles that have been sent in from Toyota, and any vehicles that have a VIN and invoice number/order number but not a stock number are pulled to the Invoices in the Vehicle Purchase screen. From this screen, the Accounting Department assigns a stock number to the vehicle and purchases the vehicle into inventory.

Important: Since Toyota may send vehicles with a temporary VIN, you should make sure that you are not purchasing a vehicle into your inventory until it is assigned the permanent VIN.

1.2.1. Setting up Vehicle Purchases

You will need to enter setup information for the vehicle purchases. These parameters determine how long vehicles will display on the Invoice screen and determine the car lines used for posting. Once entered, you will only need to edit the parameters if you want to adjust the display days or if you add new car lines.

1. Click **Accounting** on the DMS main menu.
2. Click **Setup** on the Dealership Accounting main menu.
3. Click **Vehicle Purchases** on the System Setup menu.
4. Click **Factory Communication Setup** on the Vehicle Purchase Setup menu.

- Click the **Toyota/Lexus** tab. The Toyota/Lexus Vehicle Purchase Setup screen appears.

Toyota/Lexus Vehicle Purchase Setup

Days To Display Invoices As Current: ■

Car Lines

	Cars	Trucks	
Toyota:	<input type="checkbox"/>	<input type="checkbox"/>	1D DEMO-NEW
Lexus:	<input type="checkbox"/>	<input type="checkbox"/>	1T 23T TOYOTA
Default:	<input type="checkbox"/>	<input type="checkbox"/>	1U 24D USED
			2A 24DB TRAC/PARTS
			2B 24DB USED DEMO
			2T
			3B 240C USED TOYOT

Close

- In **Days to Display Invoices as Current**, specify the number of days you want the system to retain the invoices. Invoices will display on the Invoice screen if the invoice date is within the number of days specified here. For example, if you set this parameter to 30, invoices will only display on the Invoice screen if the invoice date is within the last 30 days.
- Use the **Car Lines** section to specify the default car line for posting the cars and trucks for your makes. The car lines currently entered in the System Setup display on the right side of the screen for your reference. These car lines display on the Vehicle Purchases screen to assist with posting.
- The **Default** field allows you to assign a car line that will be used if the VIN decoder cannot determine the vehicle make.
- Click **Close** to save the changes and close the screen.

1.2.2. Purchasing a Vehicle

The manufacturer invoices allow you to pull information sent by Toyota to the Vehicle Purchases screen. This expedites the posting process since the information is already entered for you. You simply add any additional information and post the entry to the books.

- Click **Accounting** on the DMS main menu.
- Click **Journal Entries** on the Accounting main menu.
- Click **Vehicle Purchases** on the Journal Entries menu. The Vehicle Purchases screen appears.

- Click **Invoices** on the bottom of the screen. The Toyota/Lexus Vehicle Invoices screen appears. It lists all the available invoices.

Toyota/Lexus Vehicle Invoices					
Order#	Invoice Date	Stock#	VIN	Year	Description
C127A081	2013-03-13		JTLZE4FE0J022862	2012	
D102CG53	2013-03-13		JTLZE4FE8DJ030886	2013	
D102CG00	2013-03-13		JF1ZNA017D1718396	2013	
D103CH73	2013-03-13		JTEDC3EH9D2014750	2013	
D103CH76	2013-03-13		JTEB05JR405128852	2013	
D104CB86	2013-03-13		JTDZN3E07D03231892	2013	
D104CH88	2013-03-13		JTDKN3DU7D1648813	2013	
D104CH15	2013-03-13		JTEB05JR6D5129520	2013	
D105BS49	2013-03-13		JTDZN3EUXD3232888	2013	
D105CB14	2013-03-13		JTDKD1B3XD1034498	2013	
D105CB16	2013-03-13		JTDKN3DU0D1650973	2013	
D105CB22	2013-03-13		JTDKN3DU4D5594898	2013	
D105CB26	2013-03-13		JTDKN3DU5D1652153	2013	
D105CB27	2013-03-13		JTDKN3DU8D1651997	2013	
D105CB31	2013-03-13		JTDKN3DP0D3037217	2013	
D105FB47	2013-03-13		JTDKN3DU0D5595532	2013	
D105FB53	2013-03-13		JF1ZNA019D2720810	2013	
D105FB61	2013-03-13		JF1ZNA010D1720815	2013	
D106CF91	2013-03-13		JTDKN3DU8D1653281	2013	
D106CF95	2013-03-13		JTDZN3E09D3235183	2013	
D106CG01	2013-03-13		JTKJF5C78D3062493	2013	
D106CG04	2013-03-13		JTKKUPB44D1033307	2013	
D107CK78	2013-03-13		JTDKN3DU5D0342624	2013	
D107CK79	2013-03-13		JTDKN3DU2D0343097	2013	
D107CK93	2013-03-13		JTKJF5C76D3062623	2013	
D108CJ74	2013-03-13		JTDZN3E00D3239669	2013	
D123AC82	2013-03-13		JTKJF5C72D3047990	2013	
D138AI28	2013-03-13		JTKKUPB43D1029989	2013	
D151B284	2013-03-13		JTEB05JR5D5126558	2013	

Buttons: Back, Print

- Click an invoice in the list. The detail for the invoice displays.

Toyota Vehicle Invoice					
Order Number	D102CG53	Stock Number	[REDACTED]	Assign A Stock Number To This Vehicle	
2013 TOYOTA					
Model Code	6202A	Interior Color	FD10	DARK CHARC	
VIN	JTLZE4FE8DJ030886	Exterior Color	FD10	SIZZLING C	
Engine	2AZH962207	Ignition Key			
Vehicle Notes					
Invoice Number	D102CG53	Invoice Amount	.00		
Invoice Date	2013-03-13	Destination	.00		
Invoice Total	20314.00	Subtotal	.00		
Warehouse		Advertising	.00		
Integration Testing - 61 Executive Court West Middlesex, PA US		MSRP	22047.00		
		Flooring	.00		
		Fuel	.00		
		Holdback	.00		
Back		Print	Invoice List	Save	Delete Setup

- Type the stock number you want to assign this vehicle in the **Stock Number** field.

- Click **Save**. The information pulls to the Vehicle Purchases screen.

Vehicle Purchases (Integration Testing - Toyota)

Inventory | Receivables | Payables | Schedules | General Ledger | Customers

Stock: T0886

Line: 1 | T

VIN: JTLZE4FE8DJ030886

Year: 2013

Make: TOYOTA

Model Code: 6202A

Model:

Body:

New/Used: N

Received: 04 | 19 | 13

Original

Internals

Total

Invoice Number: D102CG

Invoice Amount: 20314.00

Dealer Pack: 100.00

Suggested Retail: 22047.00

Internet Price:

Description	G/L	Debit	Description	G/L	Credit
Holdback	261	.00	Floorplan	310	
Dir Trade Holdback	304	.00	Dealer Trade	314	
Finance Protection		.00	Finance Protection		
Pre-Delivery	263B	.00	Pre-Delivery	331I	
		.00			
WHOLESALE RESERVE	261A	.00	FACTORY CREDITS	076B	
WRNTY 4EVER 100	231	.00	WRNTY 4EVER 100	331W	
		.00			
Toyota Inventory	231	20314.00	Advertising Vehicles	905A	
Total Debits (+20314.00)		20314.00	Total Credits		.00

Exit | Transaction List | Purchase Vehicle | Print | Delete | Clear

- If necessary, select the car line from the car line list that displays or type the car line. Both new and used vehicles may be added to the Vehicle Purchases screen, so make sure you are using the correct car line to purchase the vehicle.
- Add or edit any information as needed on the screen.
- Once the transaction balances, click **Purchase vehicle**. If you direct post, select the posting month.
- The Vehicle Information screen appears. This screen displays general vehicle information. You can add information or edit information as needed.

Vehicle Information

Stock: T0886

Title (Number/State):

Memo:

Miles:

Keys:

Color: SIZZLING C

Color Codes: FD10 | FD10

In Service: / /

Weight:

Truck Capacity:

Car Capacity:

Cylinders:

Source:

Certified (Y/N):

Options

Holdback:

Advertising:

Dealer Prep:

Sales ACV: 20314.00

Save

12. Click **Save** when you are finished.
13. At this point, the inventory sync will transfer the stock number, accounting figures, and any other changes you made to the vehicle information back to Finance. The vehicle's status will change from "On Order" to "In Inventory."

Tip: If you batch post, the accounting figures will not update to the inventory until you finish posting the purchases to the books.

2. Inventory Updates to Toyota

Vehicle updates will be sent to Toyota when the following activities occur:

- When you assign a stock number to a VIN.
- When you update mileage or price on a certified used vehicle.

3. Retail Delivery Reporting

Throughout the deal process, the system will transmit Retail Delivery Reporting (RDR) messages to Toyota Motor Sales (TMS). This integration does not require any additional steps in the deal process. The messages are triggered automatically when you complete standard steps in the deal process. The Autosoft system triggers messages at the following points in the deal process:

- **Pending:** When you click the **Ready for Finance** link for a deal to send it to Finance, the system will send an RDR message with a "Pending" status. A VIN is required at this point.
- **Booked:** When you click the Deal Finished button to complete a deal and send it to Accounting, the system will send an RDR message with a "Booked" status.
- **Booked:** When the Accounting Department posts the deal to the Vehicle Sales journal, the system generates another RDR message with a "Booked" status.
- **Cancel:** When you unwind a deal in the Finance program and flag it as a lost sale, the system will send an RDR message with a "Cancel" status. This is not the same as unwinding the deal to a prior state. The deal must be unwound and cancelled (marked as lost).

3.1. Manually Triggering RDR Messages

You can manually submit an RDR message as needed. You would use the manual submission in the event you experience a network or connectivity issue that prevents the system from submitting messages to Dealer Daily.

4. Credit Contracts

The system will generate a Credit Contract message for a deal when you sell the following items on the deal:

- GAP
- Life
- A&H
- EWU (Wear Care, Smart Lease Protection, or Environmental Protection)

5. Repair Orders

The repair order integration provides direct access to Toyota Motor Sales (TMS). While creating the repair order, this integration allows you to pull special service campaigns (SSC) so you can review the information available for the vehicle. You can even pull open service campaigns to the repair order. You also have access to the Toyota labor operations database to pull the appropriate labor operation codes to your warranty claim. Once you close the repair order, the system automatically sends the closed repair order to Dealer Daily.

5.1. Adding Setup Information

To ensure information transfers from Autosoft DMS to the Dealer Daily Website correctly, you need to verify setup information before you begin using the repair order integration. This includes verifying your Service Advisors and Technicians are setup using the same ID number that they are assigned on the Dealer Daily StaffMaster. You will also add Warranty Parameters that determine how warranty claims are processed.

5.1.1. Verifying the Default Warranty Manufacturer

You should set Toyota as the default manufacturer for Warranty repairs. The **Warranty Manufacturers** field on the Start Repair Order screen will automatically default to **TO** for every repair order. This will verify that the DMS will download the claims to Toyota Motor Sales (TMS).

1. Click **Miscellaneous Parameters** on the System Setup Menu. The Miscellaneous Parameters screen appears.
2. Under Miscellaneous, select **TO-Toyota** for the **Default Manufacturers Warranty Repair Prompt** field.
3. Click **Save**. The system returns you to the System Setup menu.

5.1.2. Adding Warranty Parameters

The Warranty Parameters determine how the DMS will handle the Warranty repairs. The parameters also determine which repairs the DMS will submit to Toyota Motor Sales (TMS). You have the option of sending Customer Pay and/or Internal Pay repairs in addition to the Warranty claims.

1. Click **Warranty Parameters** on the System Setup menu.
2. Click **Toyota Warranty Parameters** on the Warranty Parameters menu. The Toyota Warranty Parameters screen appears.
3. In **Download Toyota Warranty Repairs**, type **Y** to indicate that the DMS should download the Warranty claims to the Dealer Daily.
4. In **Warranty Default Parts Source**, type the inventory source number (1 through 9) for Toyota parts.
5. In **Warranty Default Labor Rate**, type the letter (A through J) that corresponds to the labor rate for Warranty repairs. (You define labor rates under **Labor/Warranty/Tax Rates** in the Service Writing System Setup.)
6. Use the **Warranty Sale Is Normally Taxed By Your State** field to indicate if your state taxes Warranty sales. Type **Y** for yes or **N** for no according to the state guidelines.
7. In **Warranty Dealer Code**, type your dealership's dealer code.
8. The **Send RO for Customer Pay** and **Send RO for Internals** fields must be set to **Y** for yes.
9. Click **Save** to save the parameters.
10. Click **Exit** on the Warranty Parameters menu.
11. Click **Back** on the System Setup menu.

5.2. Understanding the Flow

Create the repair order on the Start Repair Order screen. This is where you add the customer and vehicle information. Ensure that the **Warranty Manufacturers** field contains **TO** for Toyota.

Add repairs to the repair order on the Enter Conditions screen. This is where you can view the SSC and pull the open campaigns to the repair order. See “Viewing Vehicle Service Information” on page 10 and “Pulling Open Campaigns to a Repair Order” on page 11 for more information.

Use the Lubricants/Sublet screen to add the lubricants used for the repairs and to add sublet to a repair order. You can also add shop supplies on this screen. If paint, freight, rental, or other materials apply to a repair, you will add them as sublet. You can control if paint, freight, and rental are sent as a sublet or as a service component based on the sublet code used. The codes PT for paint, FR for freight, and RT for rental will be transferred to Toyota as sublet. The codes PTI for paint, FRI for freight, and RTI for rental will be sent as service components. You should set up sublet codes in the setup accordingly so you can ensure the information transfers properly.

Review the labor for each repair on the Close Service screen. The compliant text entered on the Enter Conditions screen when adding repairs automatically pulls to the **Complaint** section. Make sure you type the cause and cure text on the lines flagged **Cause** and **Cure** to ensure they transfer properly in the download.

For Warranty repairs, the Toyota Warranty screen will display when you close the repair so you can add additional information relevant to the warranty claim. Enter the necessary information, and click **Save**.

The **Parts** button on the Toyota Warranty screen opens the Edit Parts screen. You use this screen to edit parts on the repair order. You can use this screen to switch parts between repairs and to mark the failed part. The DMS flags failed parts with an **X** (when flagged from the Parts module) or **F** (when flagged in the Service module) in the **F** column. You can have one failed part per repair.

The **Sublet** button on the Toyota Warranty screen opens the Sublet screen. You use this screen to edit or add sublet.

The Close Parts screen will display the parts on the repair order. The Parts Department adds parts to the repair order. The exception is parts added through a menu code. You can use this screen to switch parts between repairs and to mark the failed part. The DMS flags failed parts with an **X** (when flagged from the Parts module) or **F** (when flagged in the Service module) in the **F** column. You can have one failed part per repair.

The Review & Print screen displays the totals for the repair order. You cannot edit the totals on this screen. You must edit the information on the corresponding entry screen.

When you close and print the repair order, the system automatically sends the repair order to Toyota Motor Sales (TMS).

6. Labor Operation Code Download

The labor operations are available using the **Labor Time Guides** button on the bottom of the Toyota Warranty screen. The labor time guides allow you to pull the labor operation codes to the repair.

6.1. Pulling Labor Operations

1. Click **Labor Time Guides**.
2. You can search for a labor op by using the search or the menu on the left side of the screen.
3. A list of labor operation codes appears.
4. Double-click a labor operation code you want to select.
5. From the Labor Operations Time Guide screen, you can add additional times by selecting the checkbox and editing labor allowance measure, if applicable. (This screen is dictated by the labor operation. You will not be able to edit information for all labor operations. You will only be able to add time, edit time, etc. for certain labor operations.)
6. Click **OK**.
7. Click **Save**.

7. Special Service Campaigns

Once you pull the vehicle service history, the system only holds it while you are on this screen. If you advance to another screen, you will need to pull the data again.

7.1. Viewing Special Service Campaigns

1. Start the repair order on the Start Repair Order screen, and click **Next**.
2. On the Enter Conditions screen, click **Get SSC**. The button is yellow to indicate it is ready to pull information.
3. When the system has retrieved the information, the button turns green and reads, "Show SSC." Click the button. The information displays on your screen.
4. Click **Print** to print the information as needed.
5. Click **Close** to close the screen.

Tip: Click to select the **Refresh Cached Data** box to delete the saved information so you can pull new vehicle service information.

7.2. Pulling Open Campaigns to a Repair Order

If there are open campaigns in the vehicle service information, the system will pull the campaign information and let you pull it to the repair order. This adds the campaigns to the repair order without you having to type the information.

1. On the Enter Conditions screen, click **Get SSC**. The button is yellow to indicate it is ready to pull information.
2. The button turns green when the system has retrieved the information.
3. If there are open service campaigns for the vehicle, an **Import Campaigns** button will appear. Click this button.
4. The screen lists the open service campaigns. By default, all campaigns are selected. If you do not want to pull a campaign, click to clear the box on the line. Click the box to select the campaign again. Only campaigns with a checkmark in the box will pull to the repair order.
5. Click **Add**.
6. The system will create a repair for each campaign selected. The repair description will include both the service campaign number and the campaign description.
7. Click to select a repair, and add any additional information to the repair as needed.
8. Click **Save Repair**.
9. Process the repair order as you normally do.

7.3. Viewing SSC in the Service Scheduler

You can also view the vehicle service information (SSC) in the Service Xpress Scheduler. This allows you to inform customers of open campaigns and schedule those campaigns for service during the appointment.

1. Click the **Schedule Xpress** button on any Repair Order screen.
2. You can select the customer first, or you can select the day of the appointment first and then select the customer.
3. The Schedule Service screen displays the **Get SSC** button. Click the button to pull the special service campaigns. The button is yellow to indicate it is ready to pull information.
4. The button turns green when the information is ready.
5. Click the button. The information displays on your screen.
6. Click **Print** to print the information as needed.
7. Click **Close** to close the screen.
8. Use the SSC information to add the necessary campaigns to the prewrite for the appointment.

9. Finish scheduling the appointment.

Tip: The import campaign feature is not available in the scheduler since you create prewrites on a secondary screen.

7.4. Pulling SSC from Customer Information

1. Click **Service** on the DMS main menu.
2. Click **Customer Information** on the Service Writing menu.
3. Type the customer number or search for the customer.
4. The Customer Information screen displays the **Get SSC** button. Click the button to pull the special service campaigns. The button is yellow to indicate it is ready to pull information.
5. The button turns green when the information is ready.
6. Click the button. The information displays on your screen.
7. Click **Print** to print the information as needed.
8. Click **Close** to close the screen.

8. Warranty Payments

The Autosoft system retrieves warranty claim payments from Toyota Motors sales. You pull the payments to the Factory Receivable Statement posting screen instead of having to manually type the information.

8.1. Setup

You need to enter setup information that determines how the system will pull and store the statements. You cannot use the feature until you enter the setup information.

1. Click **Setup** on the Dealership Accounting menu.
2. Click **Integrated Service Sales**.
3. Click **Factory Communications Setup**.
4. Click the **Toyota/Lexus** tab.
5. In **Journal For Warranty Claim Payments**, type the journal number used to post warranty claim payments.

6. In **General Ledger Account** fields, type the general ledger account number used to post each item listed.
7. If you keep your factory receivables in the regular trade payables account, specify the vendor account the system should use to post the payment in the **Control** field.
8. In **Threshold For Automatic Adjustments**, type the amount you want to set as the threshold for automatic adjustments. Anything under this amount will post to the adjustment account.
9. Use the **Days To Purge Stale Files** field to specify the number of days you want to keep the payment files in the system. After the number of days you specify, the system will purge the old files.
10. Click **Close** to save the information and close the screen.
11. Click **Exit** until you return to the Dealership Accounting main menu.

8.2. Posting Payments

12. Click **Journal Entries**.
13. Click **Factory Receivable Statement**.
14. Click **Toyota/Lexus Payments**.
15. Click to select the payments you want to post. You can also click **Pay All** to select all payments. Click **Pay None** to clear all the boxes.
16. To pull the statement to the Factory Receivable screen, click **Process To Journals**.
17. Click **OK** when prompted to verify you want to process the entry. The information fills in on the Factory Receivable Statement screen.
18. Click a line to edit the information, or add additional lines as needed.
19. When you are finished, save or post the transaction.

9. Parts Master

Toyota Motor Sales will send two types of parts masters, referred to in FLEX DMS as “parts price tapes”: a full parts master update and a delta parts master update. The full parts master is the monthly parts master that contains complete parts master data. The delta parts master updates only contain changes TMS has made to parts. This includes adding part numbers, deleting part numbers, editing descriptions, changing pricing, and adding substitutions.

FLEX DMS will pull parts master updates daily at 7:00 a.m. EST. It pulls the delta updates daily and the full update when it is available. You can request a full parts master update on Dealer Daily, and when Autosoft pulls the parts master for that day, it will pull the full parts master instead of the available delta.

9.1. Loading the Parts Master

Although FLEX DMS pulls the delta parts master daily, the system does not update the parts master to the inventory. You must manually do this because the manual process allows you to print reports and review the update information so you know what has changed.

1. Open Autosoft FLEX DMS.
2. Click **Parts** on the main menu.
3. Click **Setup & Updates**.
4. Click **Price Tape Updates**.
5. Click **Update To Manufacturer’s Price Tape**.
6. The system prompts you to change the inventory source if necessary. Click **OK** to acknowledge the message. Use the F5 key to select the source as needed.
7. The OEM Price Tape Update screen opens. Verify the information in each field. The information is pulled from the defaults set using the **Default Tape Parameters** button on the System Setup & Updates menu. Change the information as needed.
8. Click **Update Now**.
9. Click **OK** when prompted to verify you want to run the update.
10. When the update is complete, the system displays a prompt reminding you to print the inventory changes reports. Click **OK** to acknowledge the message.
11. The system returns you to the Price Tape Update menu.

9.2. Printing Reports

After installing your parts master update, you should run two reports to update the parts master to your inventory: **Print Number Changes From Last Price Tape** and **Print Price & Number Changes From Price Tape**. These reports will identify the important changes made to your inventory. Once you update the tape to your inventory, *the reports are only available until the next update is installed*. The reports will then reflect the changes for that update.

- **Print Number Changes From Last Price Tape:** This option prints a list of the latest supersessions that have been made by the manufacturer. Use this list to cross-reference the old part numbers with the new part numbers.
- **Print Price & Number Changes From Price Tape:** This option prints a list of all of the changes that occurred during the price tape update. For a monthly update, this may be a lengthy report. This report is important because it will contain pricing changes that affect the value of your inventory. Accounting may require a copy of this report to make the necessary adjustments to the inventory value.

9.3. Viewing Supplemental Data

Seven fields on the Supplemental Part Data screen display Toyota-specific data for your inventory. This information will be updated by the part pricing files downloaded from Toyota.

1. Click **Master Inventory** on the Parts Inventory main menu.
2. Type a part number.
3. Click **Tape Data**. The Supplemental Part Data screen appears.
4. The seven fields highlighted below will display the indicated information for the part.

Supplemental Part Data

Exclude From Matrix Pricing {Y/N}: Country Code:

Exclude From All Discounts {Y/N}: Stratification Code:

Parts Locator Download Flag: Item Weight Measure:

Part/Accessory/Other (P/A/O): **P** Discontinued Date:

Defer Return By (+ Days): Min Buy Qty:

System Setup Date: Max Buy Qty:

First Stocking Date: Hazmat Ind:

Chrysler Supercedence Suffix:

Promotion Code:

Price Symbol:

Application Code:

OEM Part Number Format:

GM Required Stocking Part Flag:

Ford Prefix:

Ford Base Number:

Ford Suffix:

Ford Alpha Character In Base:

Last Activity: 08/13/2012 12:16:13

Back Save

Prior Year Sales

Q1 Sales: 1: 2: 3:

Q2 Sales: 4: 5: 6:

Q3 Sales: 7: 8: 9: 1:

Q4 Sales: 10: 11: 12:

10. Inventory Updates to Toyota

The Autosoft system will send daily (delta) and monthly parts inventory updates to Toyota Motor Sales.

The daily update includes parts inventory data collected between 12:00 am and 11:59 pm the previous day. The system will include any part that had changes to the parts record due to manual edits as well as edits resulting from sales, lost sales, and stocking procedures.

The monthly update includes your entire parts inventory. It runs the first day of each month at 12:30 AM PST. You should ensure you complete your Parts Inventory month-end procedures before the monthly inventory update is scheduled to be sent to Toyota Motor Sales.

11. Parts Orders

You use the Toyota Parts Orders screen in the Toyota Parts Workbench program to process parts orders. Because Autosoft Toyota Parts Workbench integrates with Autosoft DMS, you will create parts orders in Autosoft DMS Parts Inventory module as you normally do and pull the orders to this screen for processing. Once you finish reviewing and editing the order, you transmit it directly to Toyota Motor Sales (TMS) from this screen. Note that you cannot make changes to the order in the Toyota Part Workbench. You will need to make all edits in the DMS system.

11.1. Submitting an Order

1. Generate the order in DMS as you normally do and assign it a purchase order number.
2. Double-click the **Toyota Parts Workbench** icon on your desktop. You will be at the main menu.
3. Click **Send Order**. The Toyota Parts Order screen appears.
4. Use the **Order Number** list to select the purchase order you want to process. The purchase order displays on the screen.

The screenshot shows a window titled "Send Parts Order ('Integration Testing - Toyota - TOYOTA')". At the top, there are two dropdown menus: "Order Number:" with the value "E41913" and "Order Type:" with the value "EMG - Critical". Below these is a table with the following data:

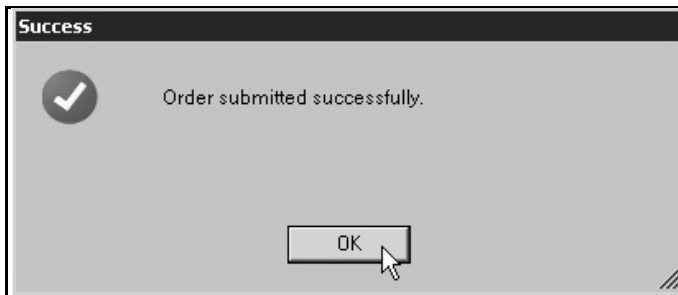
Part Number	Order Qty	Description	Bin	Name
00283-75140	1	75w/140 GEAR OIL	46	SMITH JENNIFER
00295-00103	3	FIPG OIL PAN	96	SMITH JENNIFER
17451-0P022	5	GASKET, EXHAUST	SPO	SMITH JENNIFER
41303-42021	1	COUPLING SUB-AS	SPO	SMITH JENNIFER

At the bottom of the window, there are four buttons: "Exit", "Print Preview", "Print", and "Send Order".

5. Use the **Order Type** list to select the correct order type: stock, will call, critical, or overnight. If you do not select an order type at this time, the order will be put on hold on Dealer Daily. You will need to select the order type and submit the order through Dealer Daily to complete processing of the order.
6. The bottom of the screen displays the list of parts on the order. You cannot edit the order in the Parts Workbench. If you need to edit the order, you must edit it in the Autosoft DMS program.
7. Click **Send Order**. The program connects to Toyota and sends the order.

Tip: The system validates the parts on the order against the current Parts Master. If it finds parts on the order that are not on the current Parts Master, it will display an error identifying the invalid parts. You must edit the order in your Autosoft DMS Parts Inventory to remove the parts before attempting to send the order again.

8. When the order has been sent, you will see a messages indicating the order has been successfully sent. (If there was a problem with the order, you will see an error message.) Click **OK** to acknowledge the message.



9. Click **Exit** on the Send Parts Order screen to return to the Toyota Parts Workbench main menu.

11.2. Previewing the Order

1. Click **Print Preview**.
2. A summary of the order displays on screen.
3. To print the order, click the **Print** icon on the toolbar, or click **File** and select **Print**.
4. To close the preview screen, click the **X** in the top right corner, or click **File** and select **Exit**.

11.3. Printing the Order

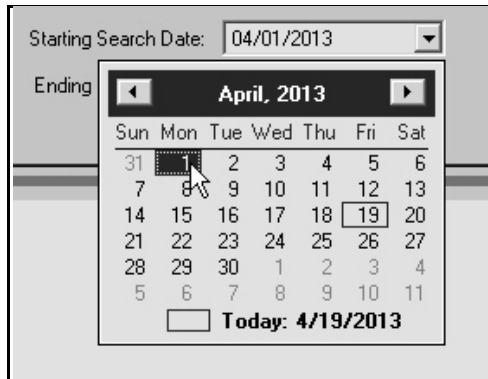
1. Make sure the correct order is displayed on the Parts Order screen.
2. Click **Print**.
3. In the Print dialog, select the printer, and click **Print**.

12. Parts Shippers

The Parts Shippers are available for viewing through the **Electronic Packing Slip** option. You will use these Parts Shippers to receipt your order when it arrives. Once you use the Parts Shippers to receipt the order, you update the order in your Autosoft DMS system.

1. Click **Electronic Packing Slip**.

- By default, the screen is set to search for Parts Shippers for the current day. Specify the date range you want to use.



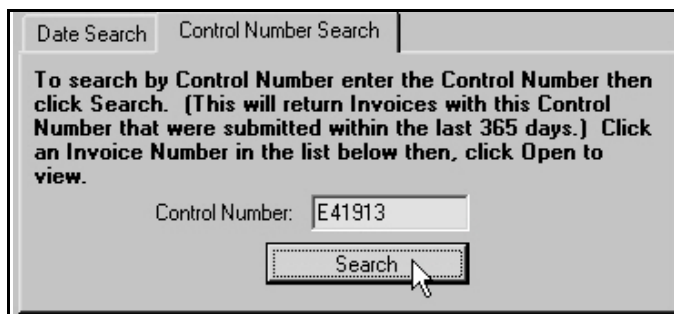
Starting Search Date: 04/01/2013

Ending

Sun	Mon	Tue	Wed	Thu	Fri	Sat
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	1	2	3	4
5	6	7	8	9	10	11

Today: 4/19/2013

You can choose to search for a specific order by clicking the **Control Number** tab and typing the specific control number. The control number is the purchase order number you assigned to the order in the Autosoft DMS Parts Inventory when you generated the order.



Date Search Control Number Search

To search by Control Number enter the Control Number then click Search. (This will return Invoices with this Control Number that were submitted within the last 365 days.) Click an Invoice Number in the list below then, click Open to view.

Control Number: E41913

Search

3. Click **Search**.
4. The screen displays the Parts Shippers that meet your search criteria.

Electronic Packing Slip Lookup

Date Search | Control Number Search

To select Packing List by Ship Date choose a Starting and Ending Date then click Search. Click an Invoice Number in the list below then, click Open to view.

Starting Search Date: 04/01/2013
 Ending Search Date: 04/19/2013

Search

Invoice Num	Ship Date
FC258254	04/12/2013
FC711531	04/12/2013
FC915780	04/12/2013

Exit | Print Selected Invoice | Open Selected Invoice

5. Click the Parts Shipper you want to view, and click **Open Selected Invoice**.
6. The screen displays the Parts Shipper.

Electronic Packing Slip Detail

SOLD TO: Integration Testing - Toyota
 61 Executive Court
 West Middlesex PA 16159

DEALER NO: 31024

SHIP REF NO: FC711531

SHIP DATE: 4/12/2013

TOTAL PARTS: 251

SHIPPED PART NO.	ORDERED PART NO.	QTY ORDER	QTY SHIP	QTY B/O	QTY CAN	DESCRIPTION
52198-AA010		1	1	0	0	BRACKET, RR BUMPER S
52535-0T010		1	1	0	0	RETAINER, FR BUMPER
52562-35010		1	1	0	0	RETAINER, RR BUMPER,
52591-0R010		1	1	0	0	SEAL, RR BUMPER SIDE
52592-0R010		1	1	0	0	SEAL, RR BUMPER SIDE
52711-35030		1	1	0	0	MOULDING, FR BUMPER
53112-35030		1	1	0	0	GRILLE, RADIATOR, LW
53211-02080		1	1	0	0	SUPPORT, RADIATOR, R
53212-02080		1	1	0	0	SUPPORT, RADIATOR, L
53214-17040		1	1	0	0	SUPPORT, RADIATOR, U
53216-01900		1	1	0	0	SUPPORT ASSY, RADIAT
53273-02050		1	1	0	0	BRACKET, FR BUMPER A
53274-01020		1	1	0	0	BRACKET, FR BUMPER A
53301-90808		1	1	0	0	PANEL SUB-ASSY, HOOD
53341-01010		1	1	0	0	INSULATOR, HOOD

Exit | Print Preview | Print

7. When you are finished viewing the packing slip, click **Exit**.
8. You will be back at the Lookup screen so you can view additional packing slips as needed.

12.1. Previewing the Parts Shipper

1. Select the Parts Shipper to view.
2. Click **Print Preview**.
3. A summary of the Parts Shipper displays on screen.
4. To print the slip, click the **Print** icon on the toolbar, or click **File** and select **Print**.
5. To close the preview screen, click the **X** in the top right corner, or click **File** and select **Exit**.

12.2. Printing the Parts Shipper

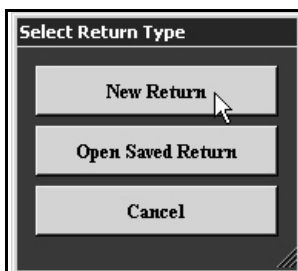
1. Select the packing slip to view
2. Click **Print**.
3. In the Print dialog, select the printer, and click **Print**.

13. Parts Returns

You use the Toyota Parts Return screen to process parts returns. You will create parts return in Autosoft DMS Parts Inventory module as you normally do and pull the return to this screen for processing. Once you finish reviewing and editing the return, you transmit it directly to Toyota Motor Sales (TMS) from this screen.

13.1. Submitting a New Return

1. Generate the order in DMS as you normally do and assign it a purchase order number.
2. Double-click the **Toyota Parts Workbench** icon on your desktop. You will be at the main menu.
3. Click **Send Return**.
4. Click **New Return** when prompted to select the return type.



5. The Parts Return screen appears.
6. Click **Import**.
7. Click the return on the list that displays.



8. The return displays on the screen.

Parts Return ('Integration Testing - Toyota - TOYOTA')

Return Number:

Authorization Number: Return Type:

Notes:

Part Number	Qty	Bin
0000176014	5	14
00002-02510	5	1
00258-00062-21	1	SPO
00258-001C7-21	1	SPO
00258-001F4-21	1	SPO
00258-003M5-21	1	WAL
00258-003Q2-21	1	WAL
00258-003Q4-21	1	WAL
00258-004M4-21	2	WAL
00258-004S2-21	1	WAL
00258-006P2-21	1	SPO
00258-008Q0-21	2	WAL
00258-008V5-21	2	SPO
00258-3Q8-21	1	SPO
00258-UCAB8-21	1	WAL
03094700	1	RET
04465-21030	1	8
04465-42120	1	8
04465-47070	1	8
04945-42030	1	8
09120-26021	1	SPO
12180-0H032	1	SPO
12180-22011	1	RTN


9. Add the authorization number or any notes as needed.

10. Type the return type as needed.

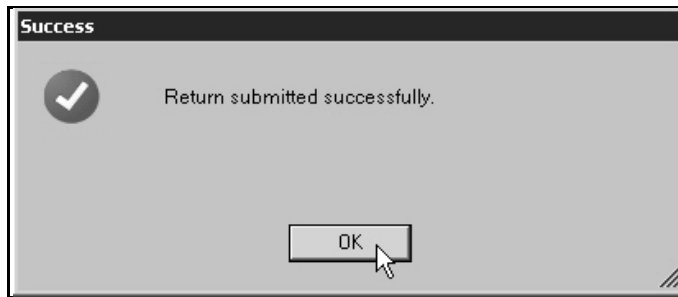
Tip: You can click **Save Return** at any time to save the changes that you make at the top of the screen. This allows you to return to this screen and bring up the return.

11. Click **Send Return**. The program connects to Toyota and sends the return.
12. The system validates the parts on the return against the current part tape. If it finds parts on the return that are not on the current price tape, it will display a warning identifying the invalid parts. You can click **Cancel** to cancel the process so you can return to the Autosoft DMS Parts Inventory to edit the order as needed, or you can click **Continue** to send the return with the parts.

Invalid Parts

 The following parts are not on the price tape:
0000176014, 00258-3Q8-21, 03094700,
5534634010B2. Click Continue to send the
Return anyway or Cancel to remove parts from the
return in the DMS and before sending.

13. When the return has been sent, you will see a messages indicating it has been successfully sent. (If there was a problem with the return, you will see an error message.) Click **OK** to acknowledge the message.



14. Click **Exit** on the Send Parts Return screen to return to the Toyota Parts Workbench main menu.

13.2. Previewing the Return

1. Click **Print Preview**.
2. A summary of the return displays on screen.
3. To print the return, click the **Print** icon on the toolbar, or click **File** and select **Print**.
4. To close the preview screen, click the **X** in the top right corner, or click **File** and select **Exit**.

13.3. Printing the Return

1. Make sure the correct return is displayed on the screen.
2. Click **Print**.
3. In the Print dialog, select the printer, and click **Print**.

13.4. Opening a Saved Return

As you work on a return on the Parts Return screen, you can click **Save Return** to save the notes and the return type for the return. If you exit the screen before sending the return, the return is considered a saved return. You will access this return using the **Open Saved Return** option.

1. Click **Send Return**.
2. Click **Open Saved Return** when prompted to select the return type.
3. The Open Saved Return list appears and displays all the saved returns.



4. Click the return you want to select, and click **Open**.
5. The return fills in on the Parts Return screen.
6. Click **Send Return** when you are ready to submit the return.

Conclusion

This completes the information needed to integrate with Toyota Motor Sales through your Autosoft DMS system. You should keep the information on hand until you are familiar with the processes. If you have questions when you are working with the integrations, call the Autosoft Support Desk at (800) 473-4630, and an Autosoft Support Desk Representative will assist you. Please note that if you are having trouble with the Toyota Motor Sales Dealer Daily Website, you will need to call the Dealer Daily Support Desk at (877) 353-2459.