

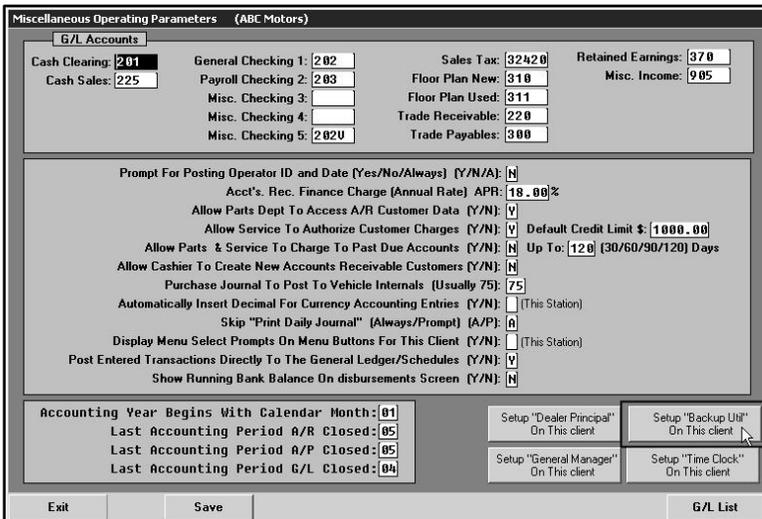
Autosoft FLEX DMS Backup Utility

The AutoSoft FLEX DMS Backup Utility integrates with your AutoSoft Dealer Management System software. It works on Windows 2000 and newer. The Backup Utility allows you to back up files and restore files from the backup. You can manually perform a backup or set an unattended (automatic) backup to run.

Installing the Utility

You install the utility through the AutoSoft DMS Accounting setup. The installation will create an icon on your desktop.

1. Open your AutoSoft DMS system.
2. Click **Accounting**.
3. Click **Setup**.
4. Click **Operating Parameters**.
5. Click **Setup "Backup Util" On This Client**.



Miscellaneous Operating Parameters (ABC Motors)

G/L Accounts

Cash Clearing: 201	General Checking 1: 202	Sales Tax: 32420	Retained Earnings: 370
Cash Sales: 225	Payroll Checking 2: 203	Floor Plan New: 310	Misc. Income: 905
	Misc. Checking 3:	Floor Plan Used: 311	
	Misc. Checking 4:	Trade Receivables: 220	
	Misc. Checking 5: 202U	Trade Payables: 300	

Prompt For Posting Operator ID and Date (Yes/No/Always) [Y/N/A]: [N]

Acct's. Rec. Finance Charge (Annual Rate) APR: 18.00%

Allow Parts Dept To Access A/R Customer Data [Y/N]: [Y]

Allow Service To Authorize Customer Charges [Y/N]: [Y] Default Credit Limit \$: 1000.00

Allow Parts & Service To Charge To Past Due Accounts [Y/N]: [N] Up To: 120 (30/60/90/120) Days

Allow Cashier To Create New Accounts Receivable Customers [Y/N]: [N]

Purchase Journal To Post To Vehicle Internals (Usually 75): 75

Automatically Insert Decimal For Currency Accounting Entries [Y/N]: [] (This Station)

Skip "Print Daily Journal" (Always/Prompt) [A/P]: [A]

Display Menu Select Prompts On Menu Buttons For This Client [Y/N]: [] (This Station)

Post Entered Transactions Directly To The General Ledger/Schedules [Y/N]: [Y]

Show Running Bank Balance On disbursements Screen [Y/N]: [N]

Accounting Year Begins With Calendar Month: 01

Last Accounting Period A/R Closed: 05

Last Accounting Period A/P Closed: 05

Last Accounting Period G/L Closed: 04

Setup "Dealer Principal" On This client

Setup "Backup Util" On This client

Setup "General Manager" On This client

Setup "Time Clock" On This client

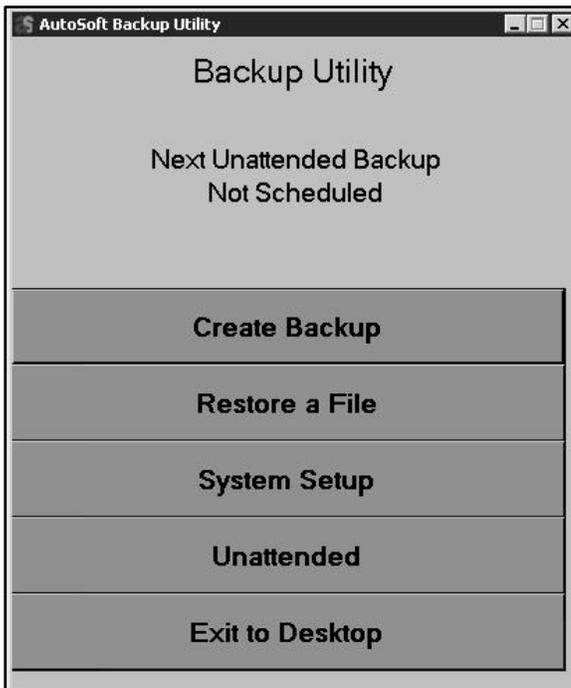
Exit Save G/L List

6. Click **OK** when prompted to verify you want to install the utility on this client.

When the installation is complete, an **ASI DMS Backup** icon will appear on the desktop

Opening the Utility

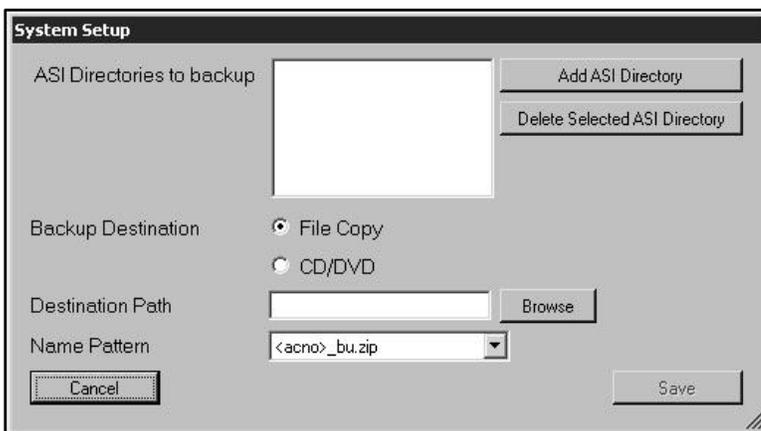
1. Double-click the **ASI DMS Backup** icon.
2. The utility opens.



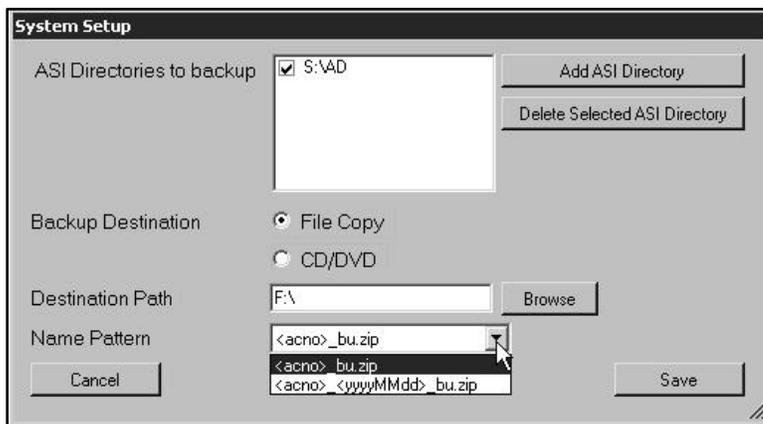
Adding Setup Information

The setup determines the default information used when performing a backup.

1. Click **System Setup**.



2. Click **Add ASI Directory**.
3. Browse to the location of your AutoSoft DMS directory, and click on it.
4. Click **OK**.
5. The directory appears in the list window. Repeat these steps for additional AutoSoft DMS directories as needed. The utility will only backup valid AutoSoft DMS files.
6. The **Backup Destination** option allows you to indicate if the backup files will be stored to an external drive or if it will be burned to a CD/DVD.
7. In **Destination Path**, type (or browse to) the path for the external drive where the files should be written or select the path for your CD/DVD burner.
8. Use the **Name Pattern** list to select the naming convention that will be used for the files.



- “<acno>_bu.zip” will create a single backup file. This backup utility will overwrite the file each time the backup runs. <acno> will be your dealership’s AutoSoft account number.
 - “<acno>_<yyyymmdd>_bu.zip” will create a file with your dealership’s AutoSoft account number and the date (yyyymmdd). The utility will create a new file each day. If a backup is run multiple times in one day, the utility will overwrite the existing file with the most recent backup file.
9. If you select the “<acno>_<yyyymmdd>_bu.zip” naming convention, you must specify the “purge” days. Set how long you want to keep the files before they are deleted. The default entry is 90 days.
 10. Click **Save**.

Creating a Backup

The **Create Backup** option allows you to manually run a backup.

1. Click **Create Backup**.
2. The **Create Backup** screen displays the settings you selected in the setup. You can edit any of the information for the backup as needed, and the system will save the changes you make to the System Setup.

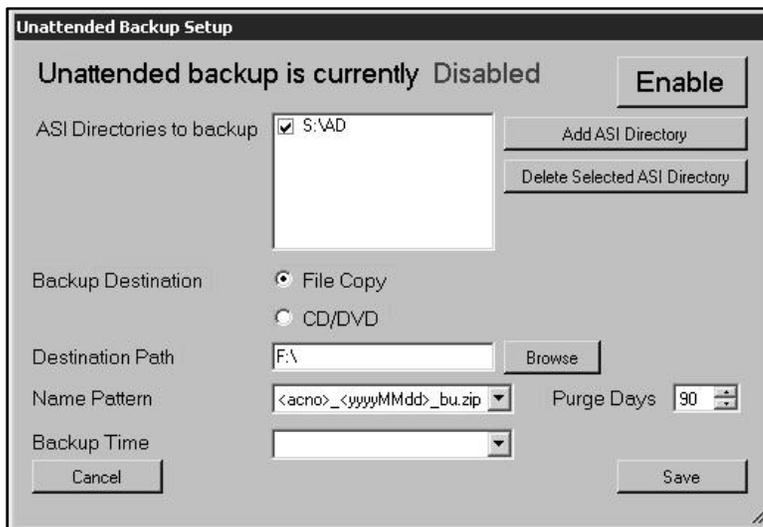
The screenshot shows the 'Create Backup' dialog box. It features a list of 'ASI Directories to backup' with 'S:\AD' selected. The 'Backup Destination' is set to 'File Copy'. The 'Destination Path' is 'F:\'. The 'Name Pattern' is '<acno>_<yyyyMMdd>_bu.zip' and 'Purge Days' is 90. Buttons for 'Add ASI Directory', 'Delete Selected ASI Directory', 'Browse', 'Cancel', and 'Backup' are visible.

3. Click **Backup** begin the backup.
4. The system displays a "Backup Complete" message when the backup is complete. Click **OK** to acknowledge the message (or **View Log** to view the backup log).

Setting an Unattended Backup

An unattended backup will run automatically at a scheduled time. This is a useful tool since this ensures that the backup runs but does not interrupt people while they are working. The backup should be scheduled to run when the DMS is not being used, ideally in the middle of the night. The Backup Utility program **MUST** be left open for the unattended backup to run.

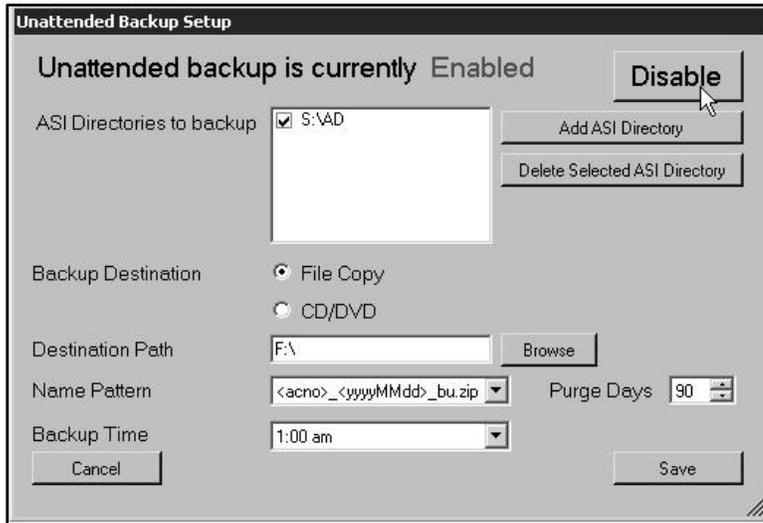
1. Click **Unattended Backup**.
2. The Unattended Backup Setup screen appears. It pulls the data you set in the System Setup. Edit the information as needed.



3. Use the **Backup Time** list to select the time when you want the backup to run.
4. Click **Enable** to turn on the backup.
5. Click **Save**.
6. The screen closes. The main menu now identifies the next time the unattended backup is scheduled to run.

Disabling the Unattended Backup

1. Click **Unattended Backup**.
2. Click **Disable** to turn off the backup.

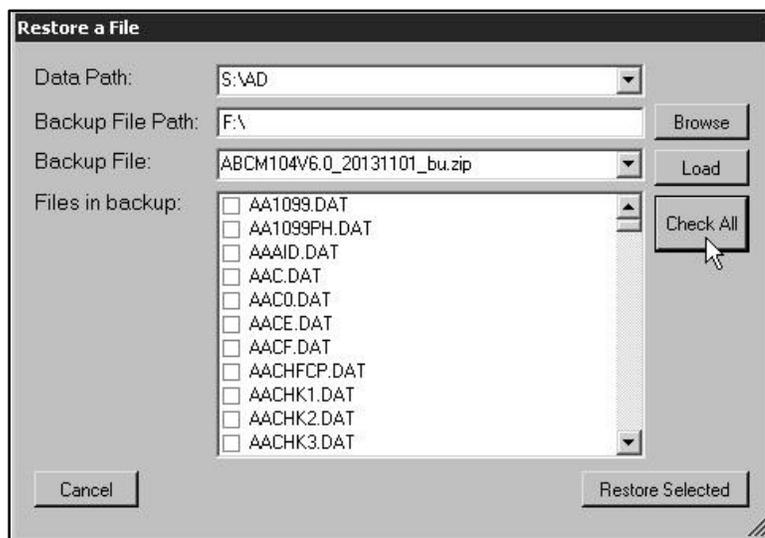


3. Click **Save**.

Restoring Files

You can restore files from the backup files. The restore feature copies a file or multiple files from backup to the designated AD directory. The files in the backup are only as current as the last backup you ran; that is why it is important to run a backup every day or to set an unattended backup to run daily.

1. Click **Restore A File**.
2. Select the data path from the list. This is where you will be copying the files from the backup.
3. The **Backup File Path** automatically fills in based on the path set in the setup. Edit it as needed. You need to ensure the external device is connected to the PC or that the backup CD/DVD is in the drive.
4. Select the backup file you want to use from the **Files in Backup** list.
5. Click **Load**. The backup files display in the window on the screen.
6. Click the box in front of a file to select it, or click **Check All** to select all the files. A check mark appears in the box to indicate the file has been selected. Click a check mark to clear the box.



7. Click **Restore Selected** to restore the selected files to the data path directory.
8. The system displays a message indicating the files have been restored. Click **OK** to acknowledge the message.