Introduction to FLEX DMS F&I

Welcome to Autosoft FLEX DMS F&I, a Web-based program that fully integrates with the Autosoft FLEX Dealership Management System (DMS). The program assists you with all the tasks your Sales and F&I departments complete when making a sale, from tracking prospects and desking the deal to performing follow-up activities and generating reports.

The user-friendly design makes it easy to learn and use the program. The data screens consist of entry boxes that identify the information you need to enter. Additionally, the program saves you time and repeated rekeying of standard information by automatically populating the appropriate boxes with default information you enter during the initial FLEX DMS F&I Setup.

The program is also very versatile, allowing you to enter any type of deal — cash, retail, lease, or wholesale. FLEX DMS F&I can accommodate the additional information necessary for completing a deal, from the bank contracts to the rebates. In addition, the program automatically calculates commission based on the criteria you specify. With FLEX DMS F&I, making sales is fast, efficient, and easy.

Logging In to the Program

The first thing you will do each day is log in to the program. To ensure the security of your data, all users are required to log in to the program. You create user names and passwords for each employee you add in the program setup. This ensures that only the people you want to access FLEX DMS F&I can open the program. You also assign specific access privileges to each user in the Setup, so the username and password used to log on to the program determines what the user can access.

Logging In for the First Time

1. Open your Web browser.

2. Navigate to https://finance.autosoft-asi.com.

Tip: Bookmark the FLEX DMS F&I login page in your Web browser to avoid having to type the URL each time you log in to the program. Each Web browser has a different method for creating bookmarks; if you're not certain how to create a bookmark in your Web browser, consult the browser's Help page. When the page is bookmarked, you will merely click on the bookmark to go directly to the FLEX DMS F&I login page.

3. The Autosoft Login screen opens.

4. In the **Username** field, type your assigned user name.

5. In the **Password** field, type your assigned password. The password is case sensitive.

6. Type the company name in the **Company ID** field.

7. Click **Login**.

8. The program opens.

9. You are prompted to select security questions. Use the **Security Question** lists to select the desired security question.
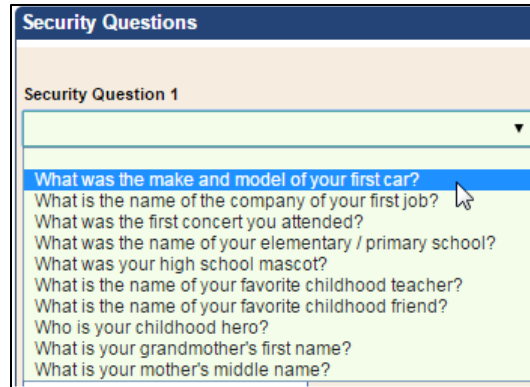
10. Use the **Answer** fields to type the answer to your selected security questions.

11. Next, type your e-mail address.

12. Click **Save**.

13. FLEX DMS F&I opens.

Resetting Passwords

You can choose to reset your password in the event you forget it. When you request to reset your password, Autosoft will send you an email message containing a link you can use to reset the password. The link is good for one hour from the time you request it. If you receive a reset link in an e-mail message that you did not request, contact Autosoft immediately.

1. Click the **Forgot Password** link above the **Login** button.

2. Type your username and e-mail address in the respective fields. The e-mail address you enter should match the one entered in your Employee record in FLEX DMS F&I.

3. Click **Submit**.

4. You will receive an e-mail message with a link to reset your password. Click the link, and follow the instructions on the screen.

Tip: The dealership's administrator sets the number of days that your password will be active. The system will begin prompting you to change your password five days before it is set to expire. You cannot repeat any of the five most recent passwords you have used.

Locking Accounts

The program automatically locks accounts if the account is not accessed within five days of creation. This is a safety feature. Administrators can unlock the accounts as needed.

After three failed log in attempts, the program also locks your account. You will need to contact your supervisor to unlock the account. At this point, only an administrator can give you access to your account.

Working with Lists

Every list in the program allows you to control how the information displays. The top row of every list displays column headers that identify the information being displayed. You can click these headers to sort the list as needed. Clicking the header once sorts the information in ascending order (numerically from zero up or alphabetically from A to Z, depending on the information displayed). Clicking the header a second time sorts the column in descending order (from the largest number to zero or from Z to A, depending on the information displayed).

The bottom of the list screen identifies the total number of pages. Click the arrows to advance through the pages to view information.

By default, each list will display the first five entries. You can use the drop-down option to select to view 10 or 20 records at a time.
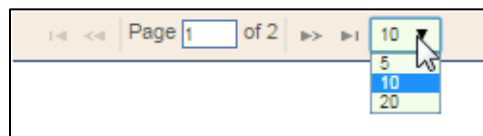
Using Links

FLEX DMS F&I can be used on desktop computers as well as portable devices. To accommodate the functionality of portable devices, links have been added throughout the program. The links allow you to select the option with a single click or by tapping the link.

Understanding Messages

The program has been designed to communicate with the user to ensure all data entered in the program is valid. As you work and enter information, the program will display error messages if a screen is missing required information. These validation errors ensure the integrity of the data you enter. You cannot save the information you've entered on a screen without entering the required data. In addition to listing the required information in an error message, the required fields will display in red.

The program also checks to verify you have saved changes to information on a screen. If you edit data and attempt to navigate away from the screen, the program will warn you that you have unsaved changes on the current screen. You can choose to cancel so you can return to the screen and save the changes, or you can choose to continue to navigate away from the current screen without saving the changes.

Tip: If you prefer to automatically save information as you move from screen to screen, you can opt to enable auto-save functionality in the Deal, Customers, and Inventory sections of FLEX DMS F&I. When enabled for an individual user, this permission allows data to be saved automatically when the user navigates away from a screen. If the information entered cannot be validated, the user will not be able to leave the screen. To enable this functionality for individual users, you must check the **Ignore Save Dialog** box within the **Roles & Permissions** tab for each employee to whom you would like to grant this permission.

Closing the Program

When you are finished working, you will use the **Logout** link at the top of the screen to log out and close the program. The program has a timeout feature that will return you to the Autosoft Login screen, so if you will be away from the computer, you should log out of the program.

Getting Ready

Now that you know how to log in to the program and use some of the basic features, you are ready to begin using FLEX DMS F&I. Each of the chapters in this manual discusses a specific feature. Read the corresponding chapter in the manual before attempting to use a feature.