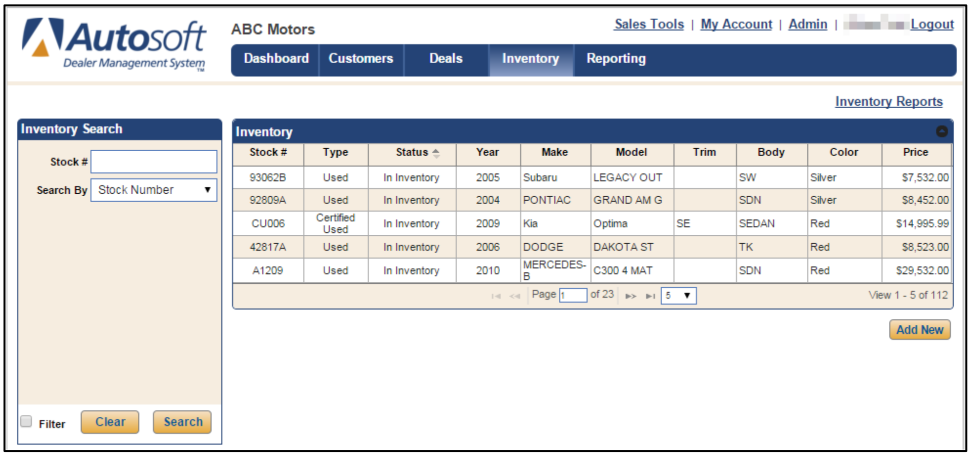
Chapter 3 Inventory

The Inventory area of FLEX DMS F&I allows you to view and edit vehicle information. If you integrate with Autosoft FLEX DMS, the inventory added in FLEX DMS Accounting will automatically be added to FLEX DMS F&I, and the inventory added in FLEX DMS F&I is added to your FLEX DMS Accounting. Similarly, changes made to vehicle records will transfer between the programs to ensure the inventory information is current in both locations.



Tip: The fields that display in the **Inventory Search** box on the left side of the screen are determined by the **Default Inventory View** setting on the Finance Info screen in the Admin section.

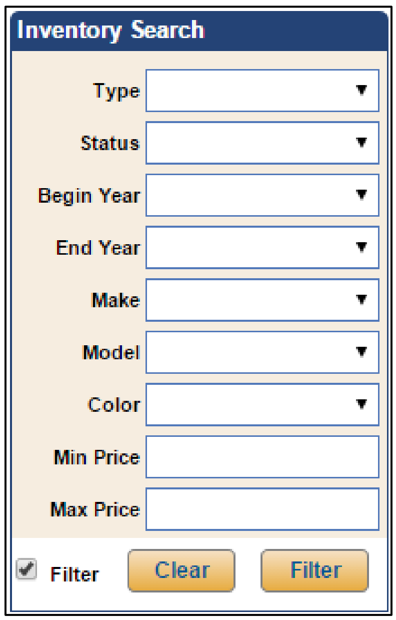
Filtering the Inventory List

By default, the screen displays all vehicles in the inventory. The fields in the **Inventory Search** box on the left side of the screen allow you to filter the inventory list based on as much or as little information as you like. This makes it easy to find vehicles that match the customer's needs.

1. Click **Inventory** from the blue toolbar at the top of the screen.

2. In the **Inventory Search** box, click the **Filter** checkbox.

3. Type or use the drop-down menus to select the search criteria you wish to use. You can enter as much or as little information as you want.



4. Click **Filter**.

5. The **Inventory** box to the right of the **Inventory Search** box lists the dealership's vehicles that match your search criteria.

6. Click on a vehicle to view its detail. The detail displays on the bottom of the screen.

Searching Inventory

While the filtering options allow you to enter basic information to locate any vehicle in inventory that meets various criteria, the search option allows you to search using specific information. This is useful when you are looking for a particular vehicle in inventory.

1. Click to clear the **Filter** box in the **Inventory Search** section if it is currently selected. The filtering drop-down menus are replaced by two fields.

2. Use the **Search By** drop-down menu to select the specific data you want to use for the search: stock number, last six characters of the VIN, invoice number, or order number.

3. The label for the top field changes based on the search criteria you select. Type the appropriate data in this field.

4. Click **Search**.

6. The Inventory list to the right of the **Inventory Search** box contains the vehicle in inventory that matches your search criteria.

7. Click the vehicle to view the detail. The detail displays on the bottom of the screen.

Adding a Vehicle

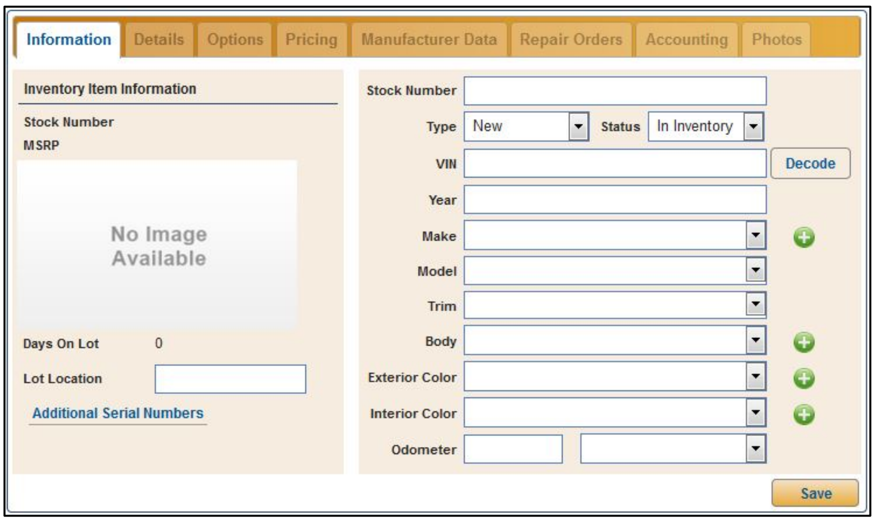
When adding vehicles through FLEX DMS F&I, you cannot add certain accounting values. This information will not be added to the vehicle's record until the Accounting Department purchases the vehicle and posts the purchase to the books. The information will then be added to the Finance inventory record through the FLEX DMS inventory sync.

1. Click **Inventory**.

2. Click **Add New** under the Inventory list.

3. Use the **Information** tab to add the basic vehicle information. The **Stock Number**, **Type**, **Year**, **Make**, and **Model** are required fields.

   You can add an item to any drop-down menu with a green **+** button next to it. Click the **+** button, type the information you wish to add, and click **Add**. The item is added to the menu.



Tip: Once you type the VIN, you can click the **Decode** button to use the VIN decoder to fill in the year, make, and model for the vehicle. If you type an invalid VIN, the system will notify you.

4. If additional serial numbers are associated with the vehicle, such as a trailer or other equipment, click the **Additional Serial Numbers** link at the bottom of the **Inventory Item Information** box.

5. In the **Additional Serial Numbers** box, click the green **+** button to add a serial number associated with the vehicle.

6. Enter a description of the inventory item associated with the vehicle in the **Description** field.

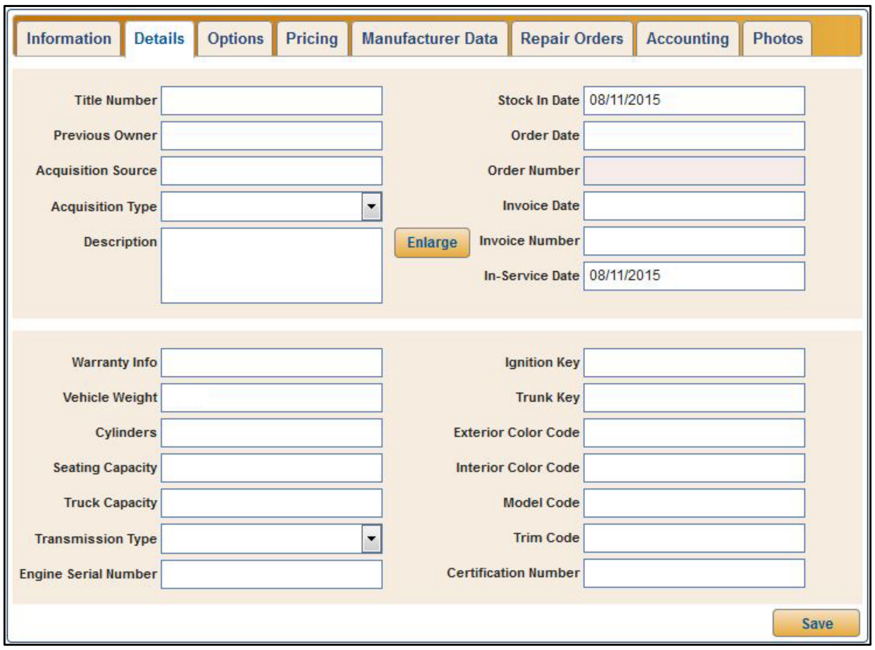
7. In the **Serial Number** field, enter the inventory item's serial number.

8. Click **Save**.

9. If you know the location of the vehicle on the lot, use the **Lot Location** field to enter that information.

10. Click **Save**. A green "Success" message will verify that the information has been saved.

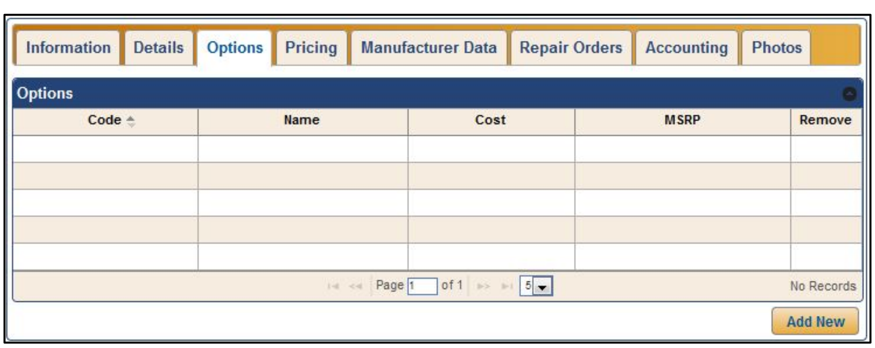
11. The **Details** tab is where you will add additional information, such as acquisition information, warranty details, etc. Note that the **Stock In Date** defaults to the current system date. This is the date you entered the vehicle into the program.



Tip: Large amounts of data can be entered in the **Description** field. You can click the **Enlarge** button next to the **Description** field to open a secondary window that allows you to view large amounts of data more easily.

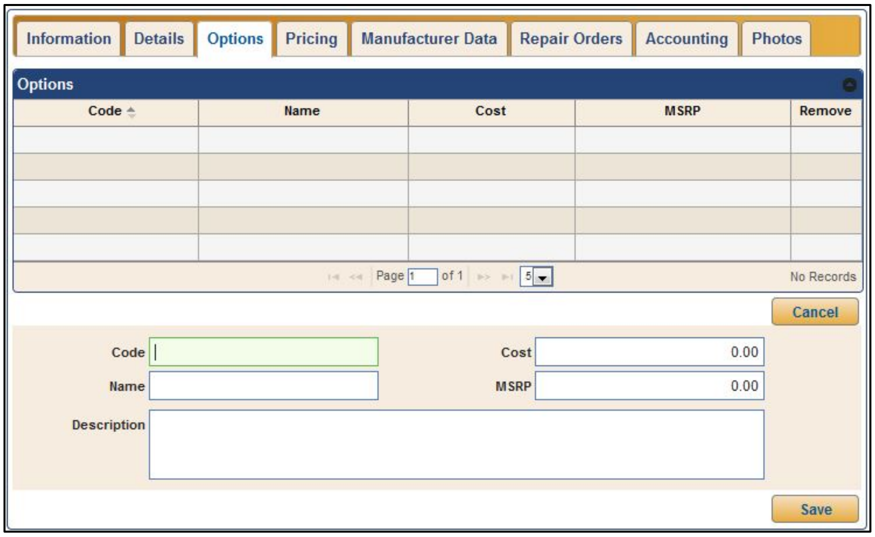
12. Click **Save** to save the information entered on this tab. A green "Success" message will verify the information has been saved.

13. The **Options** tab is where you can add the options available on the vehicle.



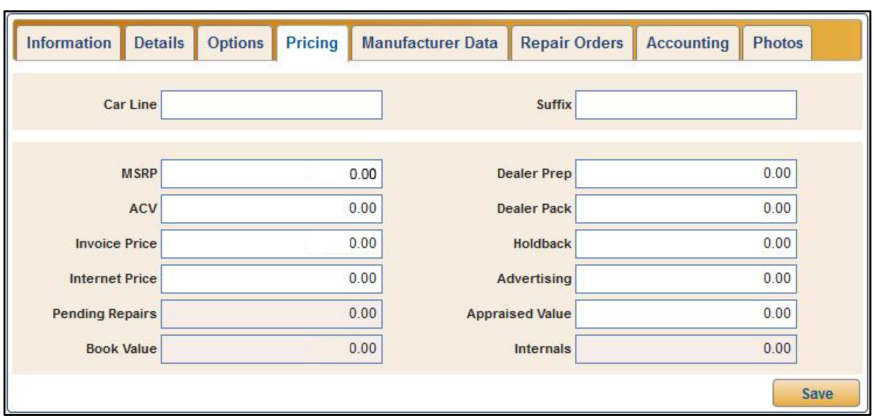
14. To add an option, click **Add New**.

15. Add the information for the option. You must add either an option code or option name for each option.



16. Click **Save**. The option will display in the options list.

17. The **Pricing** tab is where you add the pricing information for the vehicle. The lightly shaded fields are unavailable for editing because these fields display accounting figures that must be updated through the FLEX DMS Accounting module or through manufacturer vehicle invoice interfaces.

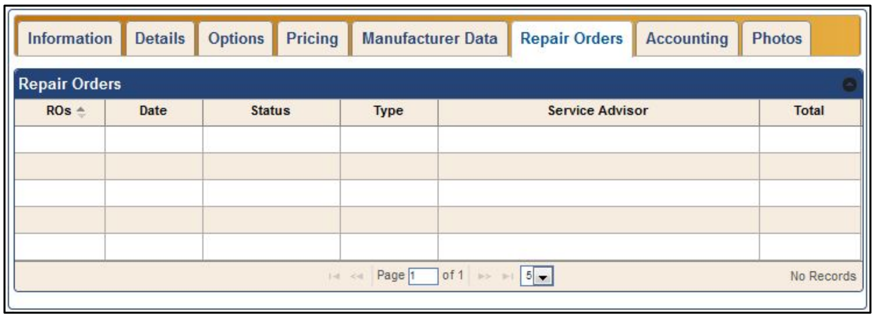


Tip: The **Invoice Price**, **Dealer Pack**, and **Holdback** fields are only available for users whose Roles & Permission settings in Setup allow them to view this information.

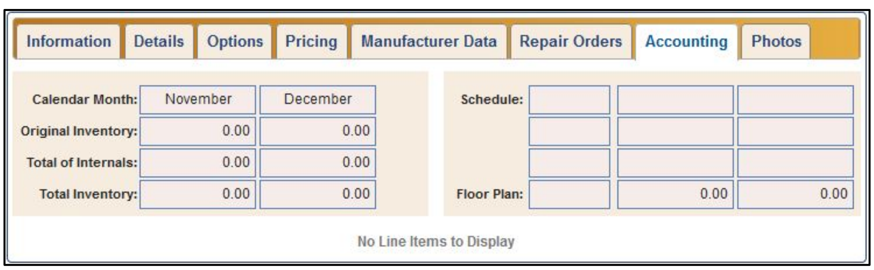
18. Click **Save** to save the information entered on this tab. A green "Success" message will verify the information has been saved.

19. If you use manufacturer inventory integration, you can view additional data on the **Manufacturer Data** tab. You cannot enter information on this tab.

20. The **Repair Orders** tab allows you to view the repair orders that have been created for the vehicle. Click a repair order in the list to view a summary of the RO.



21. The **Accounting** tab displays the vehicle's accounting schedule detail, as shown in the Accounting Vehicle Internals screen.



Tip: Users must have access to the **Show Invoice**, **Show Dealer Pack**, and **Show Holdback** security items in the Permission Management section of Roles & Permissions in Setup to view this tab.

22. Use the **Photos** tab to view, add, and delete images for the inventory vehicle. (See *Adding Photos to an Inventory Record* for full details.)

Adding Photos to an Inventory Record

Adding photos to an inventory record for a vehicle can be useful when browsing through inventory with customers. Photos of the interior and exterior of the vehicle will provide customers with a better idea of the vehicle's equipment and options.

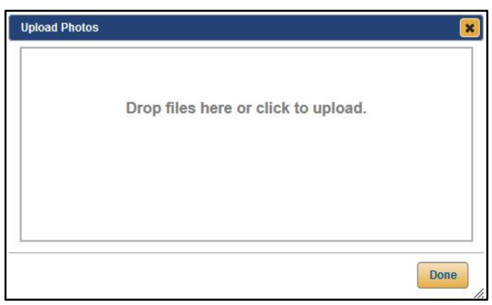
1. Click **Inventory** in the blue toolbar at the top of the screen.

2. Search for the inventory vehicle for which you would like to add photos.

3. Click on the vehicle to open the inventory tabs.

4. Click on the **Photos** tab.

5. To add a photo, click the green **+** button next to **Add Photos**. The Upload Photos window opens.



6. You can add one image at a time or a batch of photos. To add images to the box, either drag and drop image files (JPGs and PNGs) from your desktop into the window, or click on the text in the Upload Photos window to access your computer's files.

   When you choose to upload using the latter method, a file upload window will open, providing you with access to your computer's various libraries and file systems. Navigate to the appropriate drive and folder and click on the image you wish to upload. If you would like to upload multiple images this way, hold down the **CTRL** key on your keyboard while clicking the various images you would like to upload. When you've selected all the images you'd like to load for the vehicle, click **Open**.

7. The image or images will appear in the Upload Photos window. Click **Done**.

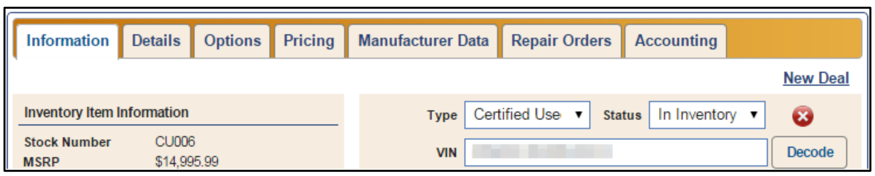
8. If you've uploaded multiple images for a vehicle, click on the image you would like to make the primary photo and click to check the **Primary Photo** box. If you upload only a single image for the vehicle, the **Primary Photo** box will automatically be checked. For batch uploads, this box is automatically checked for the first photo in the batch.

9. To remove a photo from the Photos tab, click the red **X** button next to Remove Photo. The photo is removed from the tab.

Creating a Desk for a Vehicle

When viewing an inventory record in the **Information** tab, you can use the **New Deal** link on the top-right side of the Information tab to create a new desk for the vehicle. The vehicle is automatically added to the desk.

1. Click **New Deal**.



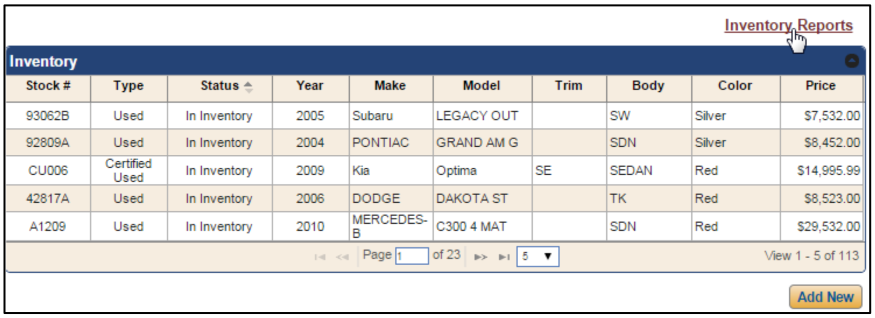
2. Type a name in the **Desk Name** field and click **Add**.

3. A new desk opens with the vehicle already added.

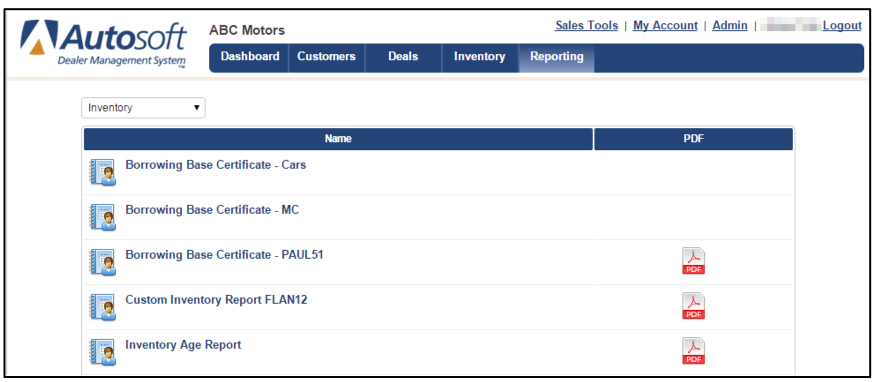
Generating Inventory Reports

1. Click **Inventory**.

2. Click the **Inventory Reports** link above the Inventory list.



3. The program takes you to the Reporting section of the program. **Inventory** is already selected as the report type.



4. The left side of the screen lists the available reports.

5. Click the report name you wish to generate. (You can also click the PDF icon on the right to view the report in a PDF viewer.)

6. The report displays on the screen.

7. Use the report toolbar to view and print the report as needed.