

FLEX DMS Parts & Service Modules' Enhanced Security Features

FLEX DMS's password utility allows you to control users' access to various portions of the DMS. By setting a multi-level password for the program, you can allow all members of a department access to the corresponding portion of the DMS with a single password for that module. However, expanded password functionality allows you to set individual user security profiles, which can provide a deeper level of security by limiting each user's access to only those areas allowed based on the user's security profile.

System Multi-Level vs. Expanded Passwords

With a system multi-level password, the user can access all options within the module for which they have been given the password. When a user attempts to open the module for which a multi-level password has been set, the system asks for the password set for the module. Any pre-existing passwords already set for a module will still be active.

However, the expanded password feature allows each user to be assigned a unique password and a security profile. If expanded passwords are established, FLEX DMS recognizes the user's unique ID when the user attempts to access the module for which they have permissions and asks for that user's password. With that password, the user can move about FLEX DMS based on his or her profile. Any options for which the user does not have permission based on his or her security profile will be grayed out and inaccessible to the user.

If both multi-level and expanded passwords exist for a module, the user can enter his or her personal expanded password instead of the multi-level password when entering the module from the FLEX DMS startup menu. This provides the user with access only to the approved options within that module based on the user's security profile.

Important: If you do not have a system multi-level or Accounting module password set up to safeguard your system, Autosoft advises that you establish such passwords before beginning the process outlined in the following pages.

Setting System Multi-Level Passwords

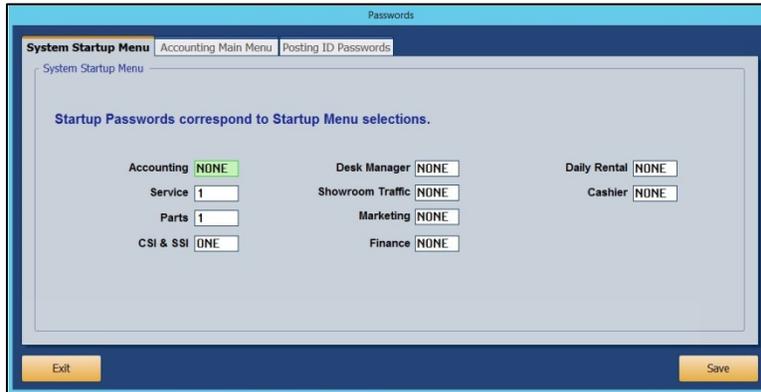
System multi-level passwords are the startup passwords necessary to access the individual FLEX DMS modules from the startup menu. Enter a different specific password of up to five alphanumeric characters for each of the modules you wish to protect. You must then share each module's password with all the users who must access that portion of FLEX DMS. When a user clicks on **Accounting**, **Service**, **Parts**, or any of the other options in the FLEX DMS Startup menu for which you establish a system multi-level password, the user will be prompted to enter the appropriate password to access that module.

Note: To establish these system multi-level passwords, you must begin in the Dealership Accounting module. Your system administrator should follow the steps outlined below.

1. From the FLEX DMS startup menu, click **Accounting**.
2. On the Dealership Accounting main menu, click **Utilities**.
3. Click **Passwords**.
4. On the Passwords menu, click **System Multi-Level**.
5. A popup will prompt you for a master password. If you do not have one established, the system will notify you as such and ask you to simply press ENTER. However, if you have a password in place to protect your system passwords, enter it on this popup screen.



- The Passwords screen will open to the **System Startup Menu** tab.



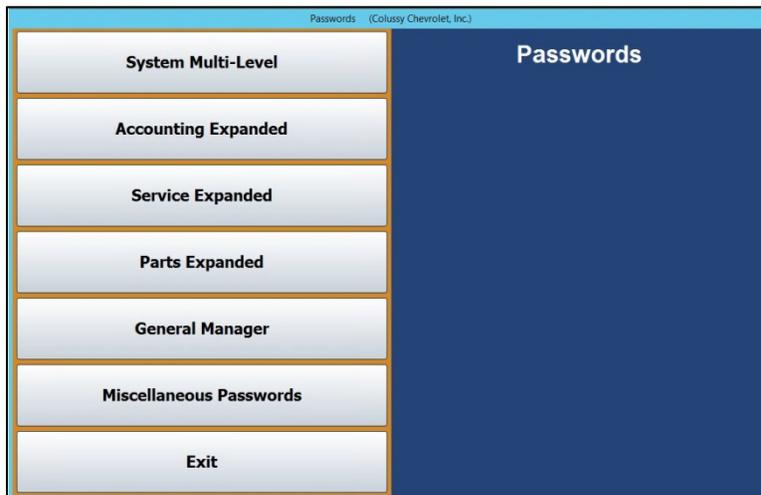
- Enter a different password for each FLEX DMS module you would like to password protect. The passwords can contain any combination of up to five alphabetical and/or numeric characters.
- Click **Save**.
- Your startup passwords will now be active. Be sure to provide the users within each department with the respective password for the corresponding module in FLEX DMS.

Note: Any existing passwords set for Parts or Service module users will still be required with the multi-level password. If an option is password protected, the user will be asked to enter his or her password to access that option.

Allowing Access to the Accounting Passwords Menu

You can limit access to the Accounting module and its **Utilities** option's Passwords menu by members of other dealership departments who require access to the expanded passwords options to set up their department's employees' passwords. For instance, a Service Manager may require access to the Accounting Utilities to set up and manage Service employees' passwords and their access to the Service module. This will prevent Accounting Department employees from having to manage access for every department of the dealership while limiting leaders of other departments from accessing any other portions of the Utilities option.

1. On the FLEX DMS startup menu, click **Accounting**.
2. From the Dealership Accounting main menu, click **Utilities**.
3. Click **Passwords**.
4. On the Passwords menu, click **Accounting Expanded**.



5. You will be prompted to enter a master password. If you have established one, enter it in the **Master Password** field. If you have not set a master password, the screen will notify you that the password is set to "NONE." In this case, press **ENTER**.

6. The Operator Accounting Passwords screen opens.

7. In the **Password** field, create a password for the FLEX DMS user you wish to grant access to the Passwords screen of the Accounting module. Be sure to make note of this password to share it with the person for whom you are establishing the password and access.
8. In the **Name** field at the top of the screen, enter the name of the employee for whom you are setting the password.
9. Enter a single-character user ID in the **Operator ID** field. The ID can be any letter of the alphabet. Be sure to make note of this operator ID to share it with the person for whom you are establishing the password and access.

Note: Once an operator ID is assigned, the ID cannot be used for another user. If you attempt to assign an operator ID to a second user, an error message will notify you that the operator ID is already in use. Click **OK** to return to the Operator Accounting Passwords screen and assign an unused operator ID.

10. On the **Main Menu** tab, all the options will be checked.

The screenshot shows the 'Operator Accounting Passwords' window. At the top, there are fields for 'Password: 1234', 'New Password:', '4344', 'ELISSA', and '0'. Below these are fields for 'Name: CHRIS' and 'Operator ID: 1'. A horizontal menu bar contains the following items: Reports & DOC's, Month End, Utilities, System Setup, Cashier, and Purchase Orders. Below the menu bar, the 'Main Menu' tab is selected, and a list of options is displayed with all checkboxes checked: Journal Transactions, Vehicle Inventory, Trade Receivables, Trade Payables, Schedules & Documents, General Ledger, Payroll, Reports & DOC's, Month End, and Utilities. At the bottom, there are buttons for 'Exit', 'Save', 'Apply Default', 'Delete', 'Clear', and 'Set Defaults'.

Click to uncheck all the options except **Utilities**. This will allow the user to access the Utilities menu only.

The screenshot shows the 'Operator Accounting Passwords' window in the same state as the previous one, but with only the 'Utilities' checkbox checked. All other checkboxes (Journal Transactions, Vehicle Inventory, Trade Receivables, Trade Payables, Schedules & Documents, General Ledger, Payroll, Reports & DOC's, and Month End) are now unchecked. The rest of the interface, including the menu bar and buttons, remains the same.

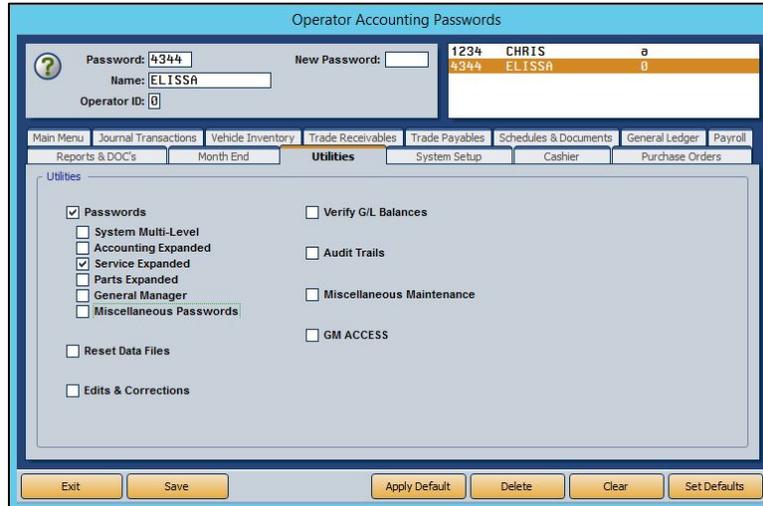
- Click the **Utilities** tab. This tab lists all of the options available on the Utilities menu. All of the options will be checked.

The screenshot shows the 'Operator Accounting Passwords' window. At the top, there are fields for 'Password: 1234', 'New Password:', '4344', 'ELISSA', and '0'. Below these are fields for 'Name: CHRIS' and 'Operator ID: 1'. A menu bar includes 'Main Menu', 'Journal Transactions', 'Vehicle Inventory', 'Trade Receivables', 'Trade Payables', 'Schedules & Documents', 'General Ledger', and 'Payroll'. A secondary menu bar includes 'Reports & DOC's', 'Month End', 'Utilities', 'System Setup', 'Cashier', and 'Purchase Orders'. The 'Utilities' section contains a list of options, all of which are checked: 'Passwords', 'System Multi-Level', 'Accounting Expanded', 'Service Expanded', 'Parts Expanded', 'General Manager', 'Miscellaneous Passwords', 'Reset Data Files', 'Edits & Corrections', 'Verify G/L Balances', 'Audit Trails', 'Miscellaneous Maintenance', and 'GM ACCESS'. At the bottom, there are buttons for 'Exit', 'Save', 'Apply Default', 'Delete', 'Clear', and 'Set Defaults'.

- Click to clear all the checkboxes except for the one next to the **Passwords** option.

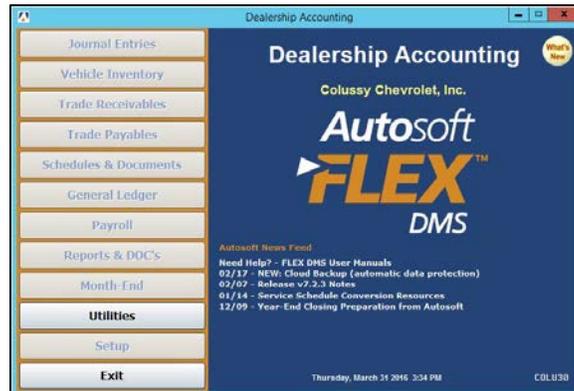
The screenshot shows the 'Operator Accounting Passwords' window after the checkboxes have been cleared. The 'Password' field now contains '4344', 'Name' contains 'ELISSA', and 'Operator ID' contains '2'. The 'Utilities' section now shows only the 'Passwords' checkbox checked, while all other options ('System Multi-Level', 'Accounting Expanded', 'Service Expanded', 'Parts Expanded', 'General Manager', 'Miscellaneous Passwords', 'Reset Data Files', 'Edits & Corrections', 'Verify G/L Balances', 'Audit Trails', 'Miscellaneous Maintenance', and 'GM ACCESS') are unchecked. The rest of the window, including the menu bars and buttons, remains the same as in the previous screenshot.

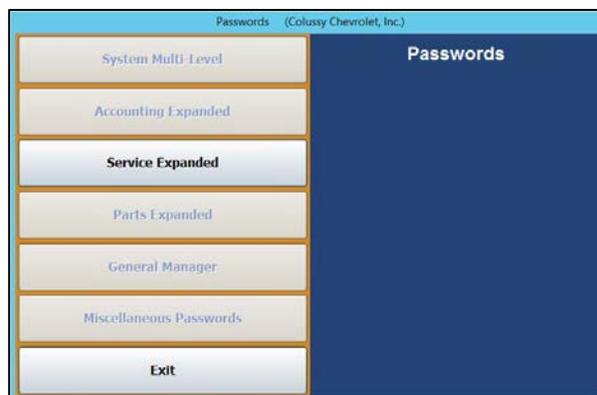
- Based on the user's needs, click the boxes to uncheck the respective Passwords menu options to which the user does not require access, leaving checked only the option or options that apply to the user. In this example, the user is left with only access to the Service Expanded option, which is suitable for a Service Manager.



- Click **Save**.
- Repeat steps 7 through 14 for each user to whom you wish to grant access to the Utilities menu, Passwords menu, and one or more of its options.

When done, be sure to provide each user with his or her Operator ID and individual password. When those users employ their passwords, only the options you've left checked will be accessible to them. The other options will be grayed out.





Setting Service Expanded and Parts Expanded Passwords

The new **Service Expanded** and **Parts Expanded** options allow you to completely restrict access to options within the Service and Parts modules based on user. The options listed on the corresponding Operator Service Passwords and Operator Parts Passwords tabs correspond with the options available on each module's various menus. Each box checked equates to an option the user can access once he or she has entered his or her password. The options for which the user does not have access according to his or her security profile will be grayed out and inaccessible to the user.

While you can manually set password options for each user by clicking on each tab in the Operator Service Password or Operator Parts Password screens, you can use the Set Default button to create default profiles that you can assign to employees based on role. You can then alter those defaults on a per-user basis.

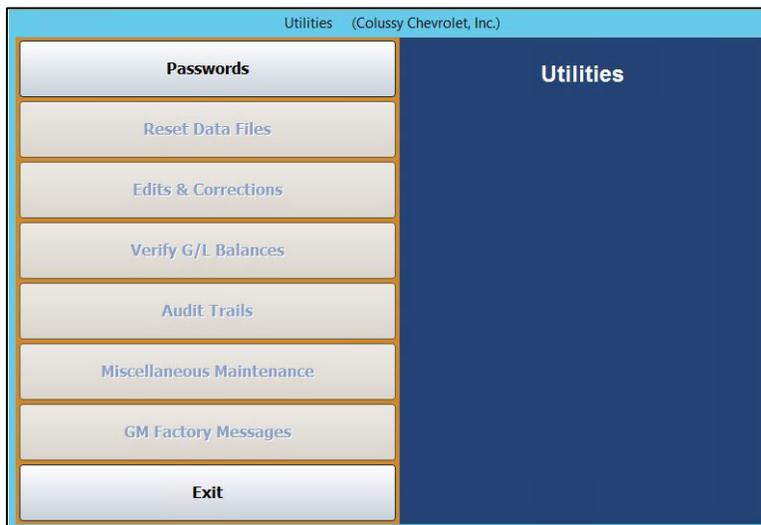
Note: To establish these expanded passwords for Service and Parts, you must begin in the Dealership Accounting module. Your system administrator or anyone with access to the Expanded Passwords screens within the Accounting module (i.e. Parts Manager or Service Manager) should use the following processes.

Service Expanded Passwords

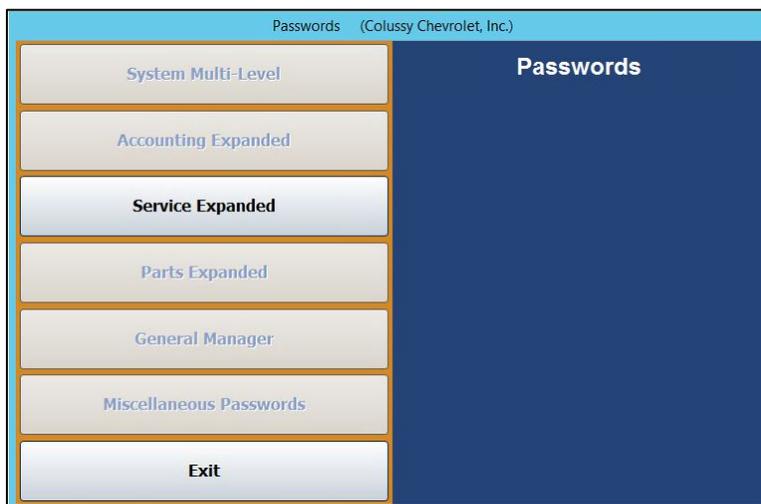
Establishing Service Expanded Security Level Defaults

You can create default settings that will help to expedite password setup. With defaults, you can create up to five different levels of access based on employee role and security clearance. Once these defaults are established, you can use them to create basic profiles for employees based on role by simply applying a default. Once a default is assigned to a user, changes to those default access settings can be made on an individual user's profile. Those changes will not affect any other users with that default setting.

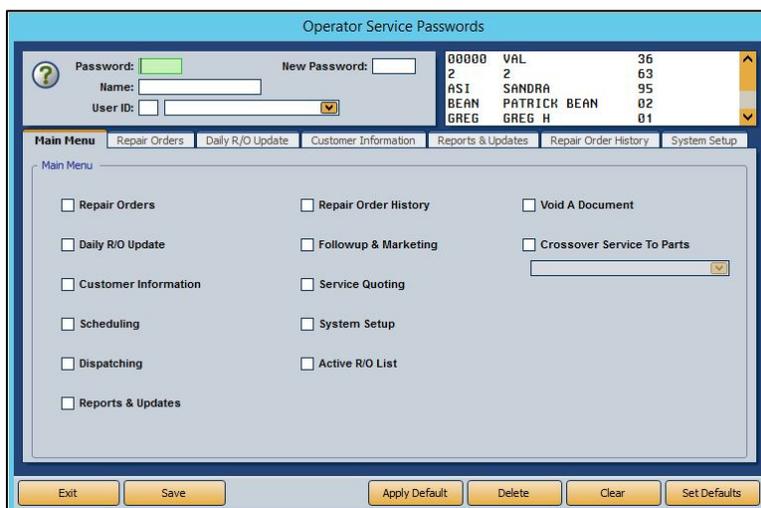
1. On the FLEX DMS startup menu, click **Accounting**.
2. From the Dealership Accounting main menu, click **Utilities**.
3. Click **Passwords**.



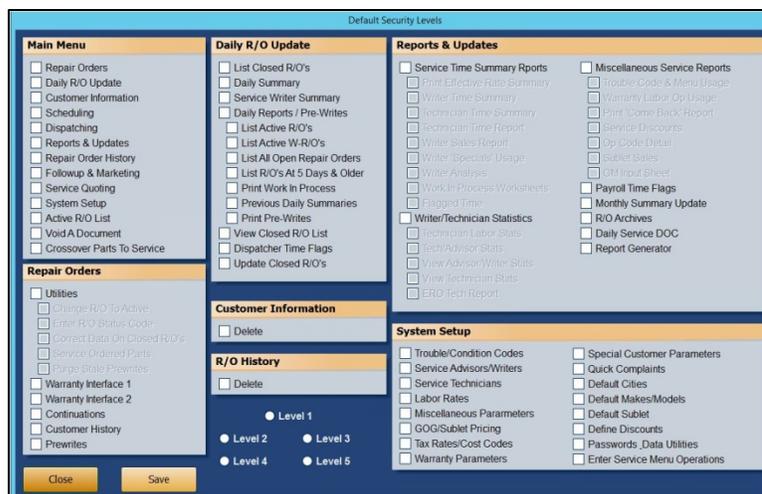
4. On the Passwords menu, click **Service Expanded**.



- You will be prompted to enter a master password. If you have established one, enter it in the **Master Password** field. If you have not set a master password, the screen will notify you that the password is set to "NONE." In this case, press **ENTER**.
- To set profile defaults to apply to groups of employees, click **Set Defaults**. You do not have to select an employee to set defaults.



- The Default Security Levels screen will open with nothing checked. To tailor a security level, click **Level 1**.



- All of the boxes on the screen will automatically be checked except the **Delete** boxes under **Customer Information** and **R/O History**.



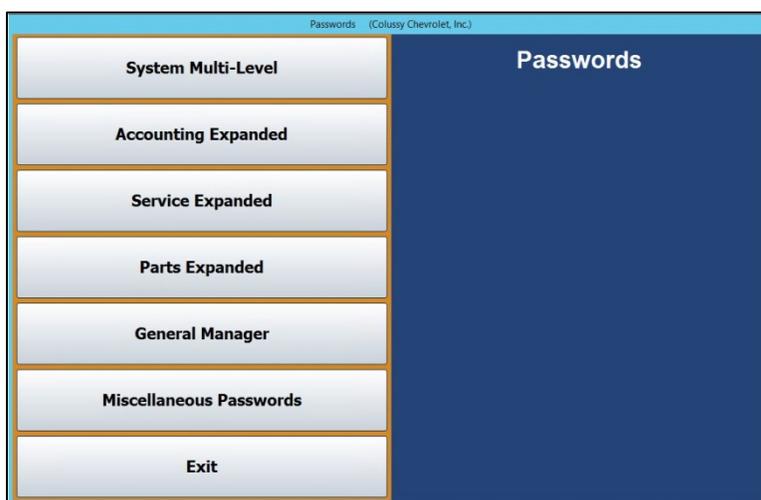
- Determine if you would like Level 1 to be your highest level of access, such as Service Manager, with each subsequent level requiring less access, or vice versa. Uncheck any of the features to which you do not want employees of this particular level to have access.

Tip: If you wish employees of this level to be able to delete customer information and repair order history, check the **Delete** boxes under **Customer Information** and **R/O History**. Autosoft does not recommend granting this permission to any users other than those with the highest security clearance. When a customer or R/O history is deleted, it cannot be retrieved. Therefore, to protect you data, Autosoft recommends you only trust a select few with this functionality.

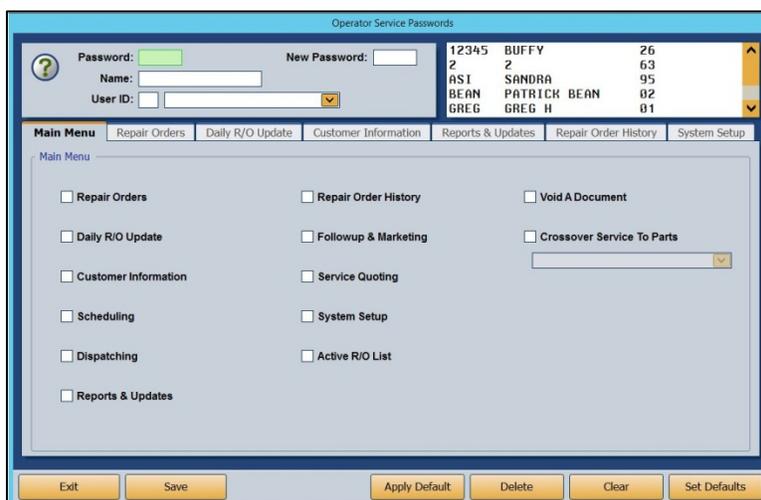
- When you're done setting up the profile for the level, click **Save**.
- Repeat Steps 7 through 10 for each level for which you would like to establish a profile.
- Click **Close** to return to the Operator Service Passwords screen.

Creating Service Expanded Passwords

1. On the FLEX DMS startup menu, click **Accounting**.
2. From the Dealership Accounting main menu, click **Utilities**.
3. Click **Passwords**.
4. On the Passwords menu, click **Service Expanded**.



5. You will be prompted to enter a master password. If you have established one, enter it in the **Master Password** field. If you have not set a master password, the screen will notify you that the password is set to "NONE." In this case, press **ENTER**.
6. The Operator Service Passwords screen will open.



7. To set an employee's password, type the Service Department employee's user ID number into the **User ID** field. The corresponding name will populate the drop-down menu to the right. If you prefer, you can use the drop-down menu to select the employee, which will then auto-populate the employee's user ID number in the **User ID** field.

8. Use the **Password** field to create a password for the employee. It can be up to five characters long and any combination of alphabetical and/or numeric characters.
9. In the **Name** field below, enter the name the employee goes by, such as a nickname, if it differs from the name on the field below.
10. Once this information is added, the checkboxes in the **Main Menu** tab below will all be checked except for **Void a Document** and **Crossover Service to Parts**. The items (excluding **Void A Document** and **Crossover Service To Parts**) listed on the tab correspond to all the options available on the Service Writing module's main menu. Several of these items also correspond to the other tabs running across the Operator Service Passwords screen. With all the boxes checked on this tab, the employee will have access to every part of the Service module.

You can exclude the employee from accessing different functions in the module by manually unchecking the corresponding boxes on each of the tabs.

Tip: To expedite password setup, you can choose to apply defaults to set basic profiles based on employee role and then assign the appropriate level of access on an individual basis. (See *Establishing Service Expanded Security Level Defaults* and *Applying Service Expanded Security Level Defaults* for detailed directions for creating and applying defaults.)

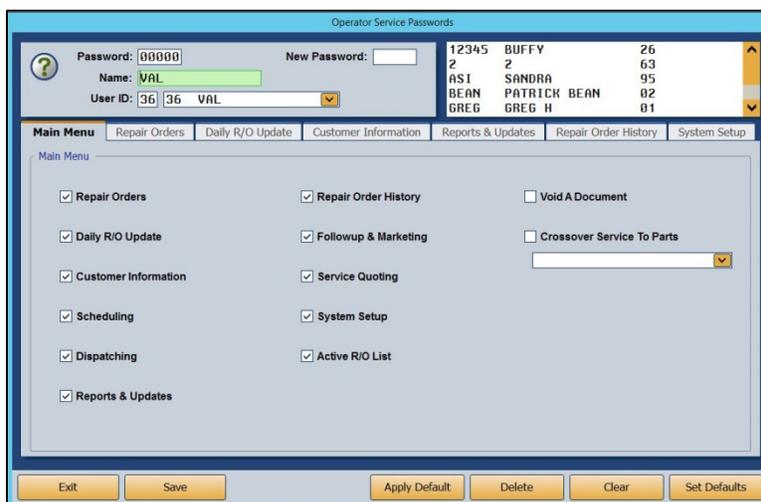
11. Check the **Void A Document** option if you wish to allow the employee to void documents.
12. Check the **Crossover Service To Parts** option if you wish for the employee to be able to cross from Service to Parts and back by clicking P and S, respectively. Use the drop-down menu below the box to choose the employee from the list. The employee must be listed in both departments to be applicable for this functionality.
13. Click **Save**.
14. Repeat steps 7 through 13 for each Service employee.
15. When you've created a security profile for every Service employee, click **Exit**.
16. Provide each user with his or her unique password.

- When users click on **Service** from the FLEX DMS startup menu, they will be asked to enter a password. They will enter their unique password, and the Service module will open. Any options that have been blocked from the individual user based on their security profile will be grayed out and inaccessible.

Note: The expanded passwords established for a user of the Service module will override any existing passwords set for that user.

Applying Service Expanded Security Level Defaults

- Complete the user information at the top of the Operator Service Passwords screen and establish a password for the user. (See *Creating Service Expanded Passwords* for detailed steps.)
- Click **Apply Default**.



- Choose the appropriate security level for the employee from the **Security Level** pop-up screen.



21. The employee's profile will change to match the password permissions set in the level default. If you would like to tailor the password access rights for the individual employee, check or uncheck any necessary boxes on any of the tabs. These changes will only apply to the employee whose profile you are viewing. They do not affect the default security level settings.
22. Check the **Void A Document** option if you wish to allow the employee to void documents.
23. Check the **Crossover Service To Parts** option if you wish for the employee to be able to cross from Service to Parts and back by clicking P and S, respectively. Use the drop-down menu below the box to choose the employee from the list. The employee must be listed in both departments to be applicable for this functionality.
24. Click **Save**.
25. Provide each user with his or her unique password.
26. When users click on **Service** from the FLEX DMS startup menu, they will be asked to enter a password. They will enter their unique password, and the Service module will open with any options that have been blocked from the individual user based on their password profile grayed out and inaccessible.

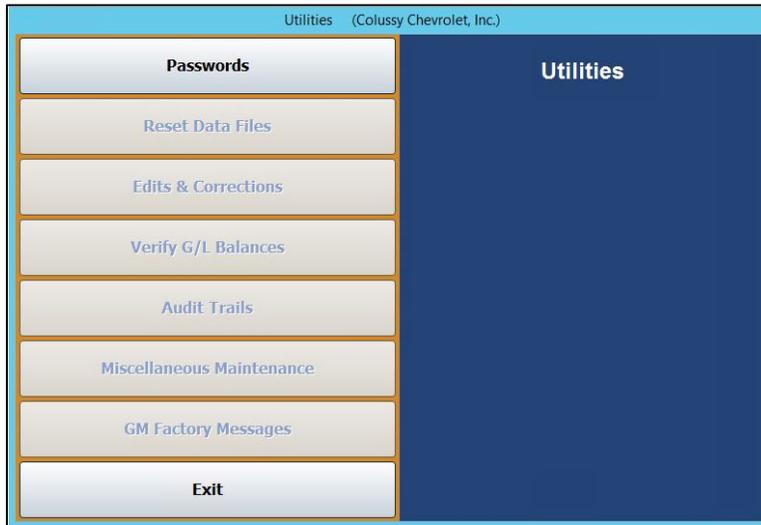
Note: The expanded passwords established for a user of the Service module will override any existing passwords set for that user.

Parts Expanded Passwords

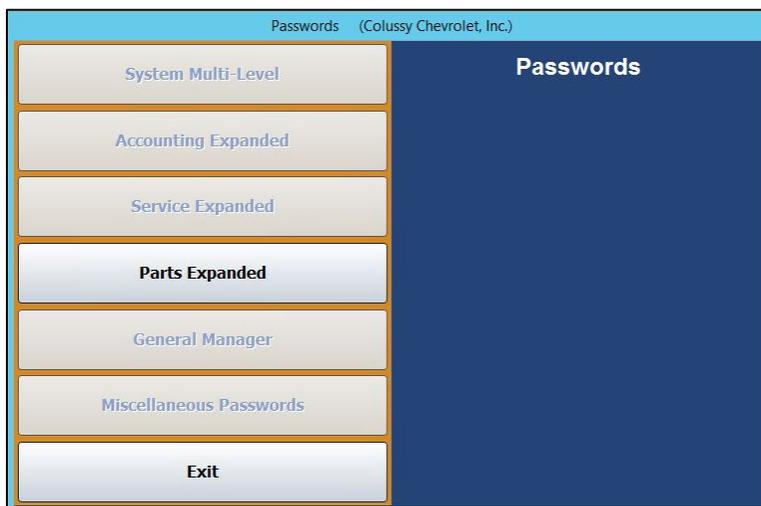
Establishing Parts Expanded Security Level Defaults

You can create default settings that will help to expedite password setup. With defaults, you can create up to five different levels of access based on employee role and security clearance. Once these defaults are established, you can use them to create basic profiles for employees based on role by simply applying a default. Once a default is assigned to a user, changes to those default access settings can be made on an individual user's profile. Those changes will not affect any other users with that default setting.

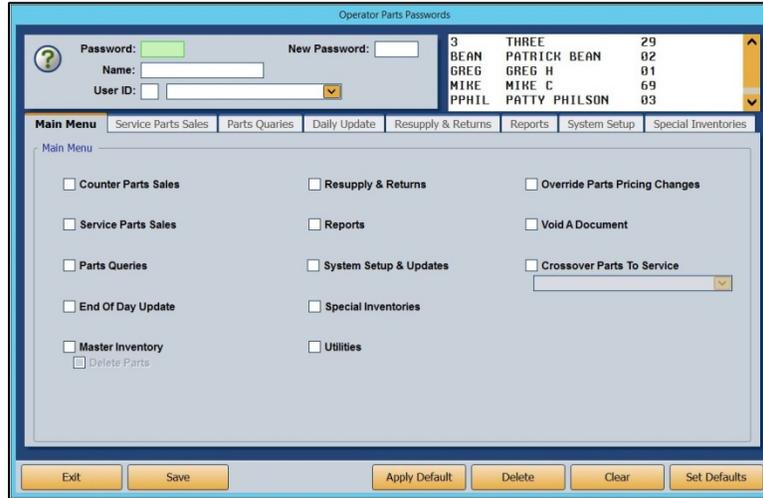
1. On the FLEX DMS startup menu, click **Accounting**.
2. From the Dealership Accounting main menu, click **Utilities**.
3. Click **Passwords**.



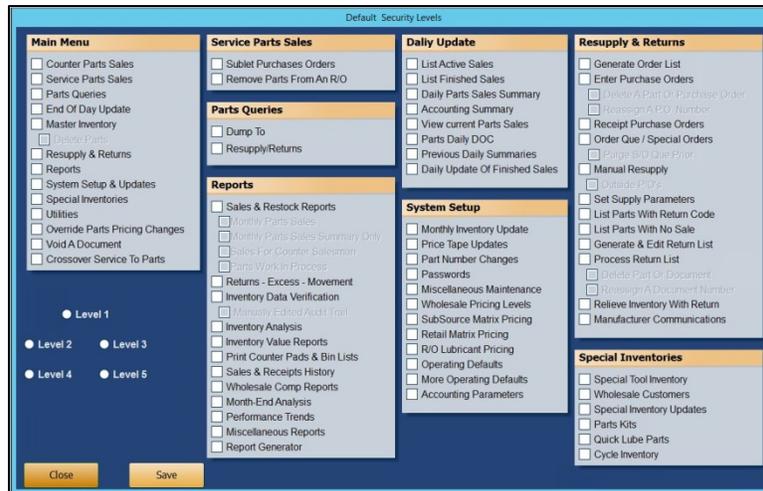
4. On the Passwords menu, click **Parts Expanded**.



- You will be prompted to enter a master password. If you have established one, enter it in the **Master Password** field. If you have not set a master password, the screen will notify you that the password is set to "NONE." In this case, press **ENTER**.
- To set profile defaults to apply to groups of employees, click **Set Defaults**. You do not have to select an employee to set defaults.



- The Default Security Levels screen will open with nothing checked. To tailor a security level, click **Level 1**.



- All of the boxes on the screen will automatically be checked except for **Delete Parts** (under **Master Inventory**).



- Determine if you would like Level 1 to be your highest level of access, such as Parts Manager, with each subsequent level requiring less access, or vice versa. Uncheck any of the features to which you do not want employees of this particular level to have access.

Tip: If you wish employees of this level to be able to delete parts from the Master Inventory, check the box under **Master Inventory**. Autosoft does not recommend providing this permission to any users other than those with the highest security clearance. When such information is deleted, it cannot be retrieved. Therefore, Autosoft recommends you only trust a select few with this functionality.

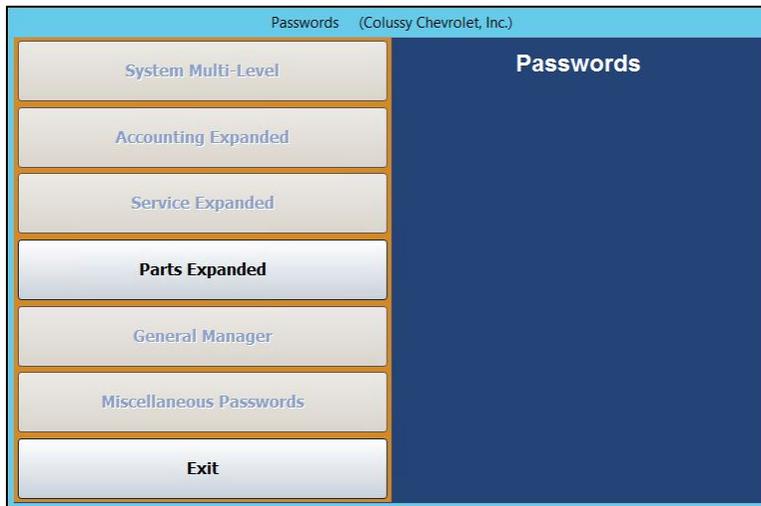
- When you're done setting up the profile for the level, click **Save**.
- Repeat Steps 7 through 10 for each level for which you would like to establish a profile.
- Click **Close** to return to the Operator Service Passwords screen.

Creating Parts Expanded Passwords

1. On the FLEX DMS startup menu, click **Accounting**.
2. From the Dealership Accounting main menu, click **Utilities**.
3. Click **Passwords**.



4. On the Passwords menu, click **Parts Expanded**.



5. You will be prompted to enter a master password. If you have established one, enter it in the **Master Password** field. If you have not set a master password, the screen will notify you that the password is set to "NONE." In this case, press **ENTER**.

6. The Operator Parts Passwords screen will open.

The screenshot shows the 'Operator Parts Passwords' window. At the top, there are input fields for 'Password' (containing '7530'), 'New Password', 'Name' (containing 'SULLY'), and 'User ID' (containing '28'). A dropdown menu next to 'User ID' is open, showing a list of employees with their names and IDs: BEAN (02), GREG (01), MIKE (69), PPHIL (83), THREE (29), PATRICK BEAN (02), GREG H (01), MIKE C (69), and PATTY PHILSON (83). Below the input fields is a 'Main Menu' tab with several sub-tabs: Service Parts Sales, Parts Queries, Daily Update, Resupply & Returns, Reports, System Setup, and Special Inventories. The 'Main Menu' sub-tab is active, displaying a grid of checkboxes for various system functions: Counter Parts Sales, Service Parts Sales, Parts Queries, End Of Day Update, Master Inventory (with a sub-option 'Delete Parts'), Resupply & Returns, Reports, System Setup & Updates, Special Inventories, Utilities, Override Parts Pricing Changes, and Void A Document. A 'Crossover Parts To Service' dropdown menu is also present. At the bottom of the window are buttons for 'Exit', 'Save', 'Apply Default', 'Delete', 'Clear', and 'Set Defaults'.

7. To set an employee's password, type the Parts Department employee's user ID number into the **User ID** field. The corresponding name will populate the drop-down menu to the right. If you prefer, you can use the drop-down menu to select the employee, which will then auto-populate the employee's user ID number in the **User ID** field.
8. Use the **Password** field to create a password for the employee. It can be up to five characters long and any combination of alphabetical and/or numeric characters.
9. In the **Name** field, enter the name the employee goes by, such as a nickname, if it differs from the name on the field below.
10. Once this information is added, the checkboxes in the **Main Menu** tab below will all be checked. The items (excluding **Void A Document** and **Crossover Parts To Service**) listed on the tab correspond to all the options available on the Parts Inventory module's main menu. Several of these items also correspond to the other tabs running across the Operator Parts Passwords screen. With all the boxes checked on this tab, the employee will have access to every part of the Parts module.

This screenshot shows the same 'Operator Parts Passwords' window as the previous one, but with the 'Main Menu' sub-tab selected. The 'Password' field now contains '7530'. The 'Name' field contains 'SULLY' and the 'User ID' field contains '28'. The dropdown menu next to 'User ID' is still open, showing the same list of employees. In the 'Main Menu' sub-tab, the following checkboxes are checked: Counter Parts Sales, Service Parts Sales, Parts Queries, End Of Day Update, Master Inventory (with 'Delete Parts' unchecked), Resupply & Returns, Reports, System Setup & Updates, Special Inventories, Utilities, and Override Parts Pricing Changes. The 'Void A Document' and 'Crossover Parts To Service' checkboxes remain unchecked. The buttons at the bottom are the same as in the previous screenshot.

11. You can exclude the employee from accessing different functions in the module by manually unchecking the corresponding boxes on each of the tabs.

Tip: To expedite password setup, you can choose to apply defaults to set basic profiles based on employee role and then assign the appropriate level of access on an individual basis. (See *Establishing Parts Expanded Security Level Defaults* and *Applying Parts Expanded Security Level Defaults* for detailed directions for creating and applying defaults.)

12. Check the **Void A Document** option if you wish to allow the employee to void documents.

Tip: Autosoft does not recommend granting permission to void documents to any users other than those with the highest security clearance. When such information is deleted, it cannot be retrieved. Therefore, Autosoft recommends you only trust a select few with this functionality.

13. Check the **Crossover Parts To Service** option if you wish for the employee to be able to cross from Parts to Service and back by clicking S and P, respectively. Use the drop-down menu below the box to choose the employee from the list. The employee must be listed in both departments to be applicable for this functionality.
14. Click **Save**.
15. Repeat Steps 7 through 14 for each Parts employee.
16. When you've created a password profile for every Parts employee, click **Exit**.
17. Provide each user with his or her unique password.
18. When users click on **Parts** from the FLEX DMS startup menu, they will be asked to enter a password. They will enter their unique password, and the Parts module will open with any options that have been blocked from the individual user based on their password profile grayed out and inaccessible.

Note: The expanded passwords established for a user of the Parts module will override any existing passwords set for that user.

Applying Parts Expanded Security Level Defaults

1. Complete the user information at the top of the Operator Parts Passwords screen and establish a password for the user. (See *Creating Parts Expanded Passwords* for detailed steps.)
2. Click **Apply Default**.

The screenshot shows the 'Operator Parts Passwords' window. At the top, there are fields for 'Password: 7530', 'New Password:', 'Name: SULLY', and 'User ID: 28 SULLIVAN'. To the right is a list of users with columns for name and ID. Below this is a 'Main Menu' section with various options checked, such as 'Counter Parts Sales', 'Service Parts Sales', 'Parts Queries', 'End Of Day Update', 'Master Inventory', 'Delete Parts', 'Resupply & Returns', 'Reports', 'System Setup & Updates', 'Special Inventories', 'Utilities', 'Override Parts Pricing Changes', and 'Void A Document'. At the bottom, there are buttons for 'Exit', 'Save', 'Apply Default', 'Delete', 'Clear', and 'Set Defaults'.

3. Choose the appropriate security level for the employee from the **Security Level** pop-up screen.

The screenshot shows a 'Security Level' dialog box. It contains a list of radio buttons for 'Level 1', 'Level 2', 'Level 3', 'Level 4', and 'Level 5'. A 'Cancel' button is located at the bottom of the dialog.

4. The employee's profile will change to match the password permissions set in the level default. If you would like to tailor the password access rights for the individual employee, check or uncheck any necessary boxes on any of the tabs. These changes will only apply to the employee whose profile you are viewing. They do not affect the default security level settings.
5. Check the **Void A Document** option if you wish to allow the employee to void documents.

Tip: Autosoft does not recommend granting permission to void documents to any users other than those with the highest security clearance. When such information is deleted, it cannot be retrieved. Therefore, Autosoft recommends you only trust a select few with this functionality.

6. Check the **Crossover Parts To Service** option if you wish for the employee to be able to cross from Parts to Service and back by clicking S and P, respectively. Use the drop-down menu below the box to choose the employee from the list. The employee must be listed in both departments to be applicable for this functionality.
7. Click **Save**.
8. Repeat steps 1 through 7 for each employee to whose profile you would like to apply the security level settings.
9. Provide each user with his or her unique password.
10. When users click on **Parts** from the FLEX DMS startup menu, they will be asked to enter a password. They will enter their unique password, and the Parts module will open with any options that have been blocked from the individual user based on their password profile grayed out and inaccessible.

Note: The expanded passwords established for a user of the Parts module will override any existing passwords set for that user.