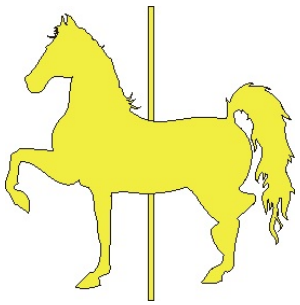
CarouselCar User Guides

The Inventory Program

Version 2.11 January 2020



Part 1 – Introduction and Definition of Terms.

The Inventory program is the first program you will need to use when you acquire a car to sell. This program allows you to enter a vehicle into your inventory, and then fill in the characteristics of the car, where you bought it from, and what you have had done to it (eg, reconditioning). It also maintains a list of vendors that you use for the reconditioning.

The primary focus of our whole system is a particular car, and that car is identified with a stock number, or StockID. This identification can be anything you want up to 10 characters, using both numbers and letters. It can be in any order that you want, but I will present lists of data in sorted alphabetic sequence. Most dealers some sort of sequential numbering, but a significant nubmer use the last six digits of the VIN. The only real restriction is, you may not have two cars with the same stock number.

Another focus of our system is a Customer. *A Customer can be either the person or company you bought a car from, or a person or company your are selling a car to.* (You may not like that definition, that a customer can be somebody you buy a car from, but it works for me and it makes my programming a whole lot easier.) Customers should have unique Company names, if it is a company, or First and Last names, if it is an individual. You can have two different customers with the same name (eg Bob Smith) but they should have different addresses. These will be two different people in the database, and you will have to recognize which is which by their address.

This would probably be a good place to define some technical terms. These terms will be used throughout the various documents.

Generally you will use both the keyboard and the mouse as you wend your way through these programs. It is possible to use the keyboard only, but I do not recommend it. The whole point of a WIMPy (Windows, Icons, Mice and Pointers) environment is to do what you want to do, when you want to do it, in the order that you want to do it. You get to be the guy in charge, not the programmer. I have to figure out what it is you are trying to do, and then do it for you. The easiest way for you to accomplish this is to use the mouse. However, if you must use the keyboard, a lot of the buttons that you need to click have an underline in the command name. Typing the Alt key and that letter simultaneously will generate the same event as if you clicked on the button. All keyboard entries end with a Tab key, which takes you to the next logical field that you need to work with.

The mouse can be used to select a box into which you will enter data, click a button, check a box, move to another tab on a screen. And you can do it directly.

A **Form** (the screen you are looking at when the program runs) uses a small set of defined **Objects** for the user to manipulate. We have **Text Entry** boxes, where you enter a number or a word. Text Boxes are just a 3D rectangle. We have **Combo Boxes**, where you can select from a

list of items, or sometimes enter your own item if the one you want is not there. Combo boxes will be a 3D rectangle with a little arrow to the right of the input area. We have **List Boxes**, where you can see a list of items, and sometimes select one. We have **Buttons** (which seem to bulge out of the screen), which you can click with the mouse, or sometimes click with a keystroke. We have **radio buttons** or **checkboxes**, where you select from a list of available options. Sometimes these objects are made Invisible (you can't see them, but they are still there), and sometimes they are made Disabled, which means you can see them, but they are sort of pale versions of an Enabled object, and you cannot do anything with the object.

These objects are arranged in a sequence (a **Tab Order**) so that you can use the Tab key on your keyboard to eventually wander through all the available objects on the screen. But as I said above, I don't recommend doing that. Use the mouse to go directly to the thing you want to do, do it, and then go on to something else.

Sometime, if you see a button in which a part of a word is **underlined**, you can "click" that button from the keyboard. If for instance, you see the word "Update", then you can type an Alt U to click this button. That is, hold down the Alt key (either of them, there are generally two of them on a keyboard) and simultaneously type the underline letter.

Most of the programs that we provide use a **Tabbed Form** (see Figure 3.1). There are a series of folder tabs along the top of the screen that allow you to select a particular function. This allows us to provide a lot of information on a limited amount of real estate (that is, the screen area). Most of the programs also have a drop down box to select a car from your inventory. This program also presents you with a selection of buttons to do other things.

Note that this program is used for entering reconditioning data for all cars. However, the initial entry of a car can come from either this program, or if a customer trades in a car when buying another car, those trade in cars will automatically roll into the inventory when that deal is complete. They will already have the car description and dealer cost data entered, but anything else you will have to enter with this program.

Part 2 -- The Opening Screen

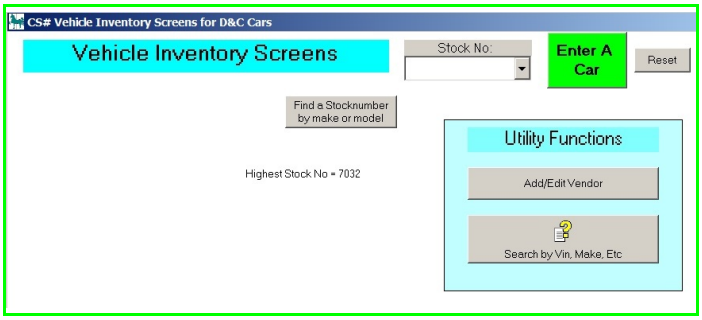


Figure 2.1 – Opening Screen

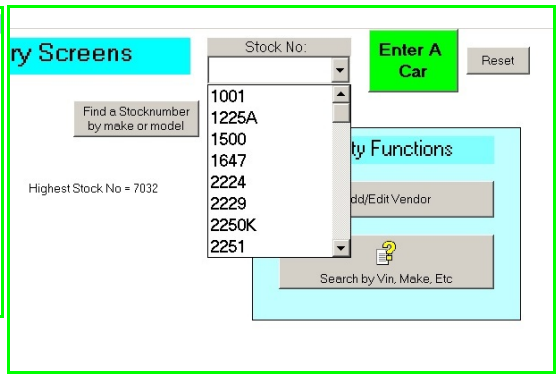


Figure 2.2 – Stock ID Dropdown List

This is the screen (figure 2.1) that you will see when the Inventory program first comes up. At the top center is something called a Drop Down Combo Box, the little rectangle with an arrow to the right. You have the choice of entering a stock number into this box manually, or clicking on the little arrow. If you click on the arrow, then a list of all the unsold stock numbers will be displayed, and you can select one by clicking it (See Figure 2.2).

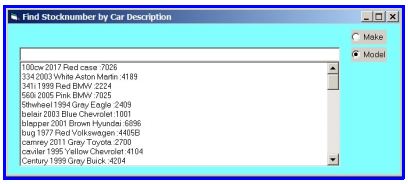


Figure 2.3 – find by make or model

There is another way to select a vehicle, and that is to click the "Find a Stocknumber by Make or Model" button. When you click this button, you will get the screen in Figure 2.3. It will list by default all the vehicles in inventory by their model (eg Passat) or, if you click the radio button on the top right, by make and then model. Click a vehicle and the program will insert the proper stock number into the entry box for you.

Once a stock number has been entered, you can hit either the tab key, or the enter key, or click on the Enter Car button, to go on to the next step.

Note that you can also View Sold cars, but you have to know their stock number, and enter it manually into the box. There are several ways to find these cars (by customer, by make/model, by when sold, etc. See the Inventory Display section (Part 11) for more information.

On the main screen, you will see two buttons along the top row: the Save Data/ Enter Car button and the Reset button, which allows you to blow away whatever it was you were doing and get back to square 1. There is more about this in Part 8 of this document.

The center of the screen shows the highest stock number in alphabetic sequence. This could be useful for entering the stock number of the next car – if you sequenced all your stock numbers numerically, this would show you the highest numbered StockID.

You will also sometimes see a message to the left of that, which indicates the Last StockID that you did something to in this program session. That can be useful if you need to go back and do something else to that same car, or if you are doing something to a whole list of cars.

In the center right of the screen is a set of Utility Functions, which will be described in Part 9 of this manual.

Once you click on a dropdown list StockID, or enter a StockID manually, it will show up in the combo box itself. You can then type the Tab or Enter key to go on to the next step.

Part 3 – The Car Description

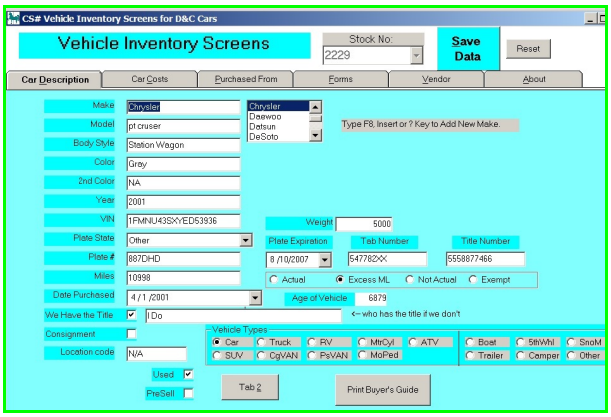


Figure 3.1 – Car Description Tab

Here you can see what I mean by Tabbed Forms. The row of gray tabs across the screen are each little mini forms. When the tab is clicked, that tab becomes highlighted (in this case, Car Description is clicked) and the contents of that tab are displayed. We will go through the tabs in sequence.

This is the first tab to be seen, once a StockID is entered. If this is a new StockID, then there will be default data in the boxes. In the figure 3.1 case, we have selected an existing StockID, where we have already entered some data, but may choose to change it. There is a third case, where you may have entered a StockID that has been sold. In that case, the top of the screen will be a bright red, as you can see on the right. However, all the data is there. We are just warning you to not change anything, since the car is presumably long gone.

Figure 3.2 – Sold Car Warnings

The data to be entered is generally self explanatory. We ask for the following data:

- Make – of the car (eg Ford). Select from a List.
- Model – Taurus, LX35, the subset of the Make
- Body Style – generally, what kind of car. Select from a List.
- Color – primary color of the car. Select from a List.
- Color2 – secondary color of the car, if any. Select from a List. NA is a valid entry.
- Year – model year of the car, eg 1998
- VIN – the 17 character Vehicle Information Number.
- Weight – the weight of the vehicle, in pounds. GVR for trucks.
- Plate State – what state or province did this car come from. V2.11 knows all countries.
- Plate # – the number on the car plate
- Plane Exp – Plate Expiration Date
- Tab Number – number on the sticky thing you get every year for your license
- Title Number – the serial number on the title for this vehicle
- Miles – Odometer reading when the car was purchased. Use a 0 for a car that is exempt, such as a car with over 100,000 miles on it, or if you do not know the actual number.
- We now have a radio box where you can explicitly declare the status of the odometer reading – Actual, Not actual, Excess or Exempt.

- Date Purchased – when did the dealership acquire the vehicle. Date Picker. Click on the little arrow symbol, and a calendar will pop up. If you want to change the date data manually, use the left/right arrow keys to move to a field (month, day year) and the up/down arrow keys to change the field. Do NOT enter the data numerically.
- Who has the title. This consists of a checkbox, checked if we have the title, and a textbox with the name of who it is that does have the title if we do not.
- Date Purchased – the effective date when the car because the Dealer's property.
- age of Vehicle – number of days it has been in your inventory.
- Have Title Checkbox – checked if the Dealer has the title to the car
- Who Has Title – name of the person who has the title. This will be erased when you check the Have Title checkbox.
- Consignment – checked if this car is here on consignment. Quickbooks will not see any export records about this car until it is sold. This must be checked when the vehicle is entered into the system, before the next Quickbooks export.
- Used – default checked if this is a Used car, unchecked if it is a New vehicle..
- A set of Radio buttons that lets you select if this vehicle is a car, truck, boat, trailer, 4 wheeler, or other. This information will be used in the License Fee calculation. Note that for Washington dealers, this (along with a similar set of buttons on the TradeIn screen) determines if a trade in has a sales tax offset or not. There are very specific rules in Washington about what gets to offset what. In Idaho, you can bring in a dead horse and that will qualify.
- Location – This can be used for several purposes – where a car physically is, or who among several people actually own the car – anything that can fit in 10 letters.
- PreSell – check this to stock the car into inventory, but to not allow it to be sold. This would be used when you receive a car, want to enter its information right away, but it needs to go through your shop for safety checks. These stock numbers will not show up in the deal program.

Most of the entry boxes rely on you to enter the necessary data. The Plate State Combo box requires you to select either your Local State or Other. In v2.11, you can enter the actual state from which it was last licensed. Note that the Purchased Date box has a little arrow on the right side of the box. Clicking on this arrow will bring up a calendar control that you can select a date from.

- I do some verification of the data found in the VIN against the other data you have already entered.
- You will get a warning message if the VIN does not contain 17 characters. Note that trailers and boats, and vehicles befoe 1980 do not follow these rules.
- I check digit 2 of the VIN to see if it matches up with the car Make you specified.
- I check digit 10 of the VIN to see if it matches up with the Year you specified. Note that these checks are not reliable for cars built earlier than 1980.
- I also check something called a check digit, which is digit 9 of the VIN.

- I check that you do not enter the illegal characters I,O or Q.

In case any of these checks fail, you will get a warning message on the screen. However, I do not force you to make things right. I only warn you about what I think are errors. You can fix it or leave it, as you desire, and I will take whatever VIN you have entered.

Figure 3.3 – List box for the car Make entry

Five entry boxes pop up a list of possible answers, which may be selected, or you can enter a new value that is not already in the database. These are: Make, Model, Body Style, Color and Color2. For each of these entries, you will see a list box pop up to the right of the entry box. In the figure to the left, the Make box has popped up a list of car makes that the database knows about. You can enter the first few letters of the car make in the input box (the box next to the word Make). As you do this, the list box will zero in on those Makes that match the letters you have entered. You can see the selection because it will be highlighted in blue. Or you can scroll the list box up and down till you find a match, and select it with the mouse.

If the value you are looking for is not there, you can enter the new name in the input box, and then type the F8 key (or Insert key or Question Mark Key) to enter it. This will tell the system that you are indeed entering a new value into the database, not just mistyping something. That value will then be available to you in the list box after that. (Note that for the Model pop up box, you do NOT have to click on F8 to enter a new value into the box. Any data entered in the main box will be entered into the select box next time. The Model data does not come from a predefined list, but from your actual database of models for the selected car make, so it will dynamically expand as you enter more data into the system.) For some reason, some keyboards will not recognize the F8 key any more. In those cases, first try the Insert key, and if that does not work, the Question Mark key.

You can print a Buyer's Guide at this time by clicking on the button at the bottom of the screen. This particular form must be set up in the Admin screen with the Inventory radio button selected as Active, and the specific form to print must have its Dealer Specific field set to "-ASIS". See the CarForms part of the Admin User Guide for more information. If you are using Scanned forms, the Back Page of this form needs to be printed from the Forms tab. We can now print the buyer's guide from a scanned copy downloaded from the FTC web site, and we can print it duplex if you have a duplex printer. We have special form numbers for printing both parts of the Buyer's Guide with one form number.

To get to the next part of the Inventory screen, either click on the next tab, or the Tab2 button at the bottom of the screen, or type an Alt 2.

Part 3A – Extra Car Descriptions

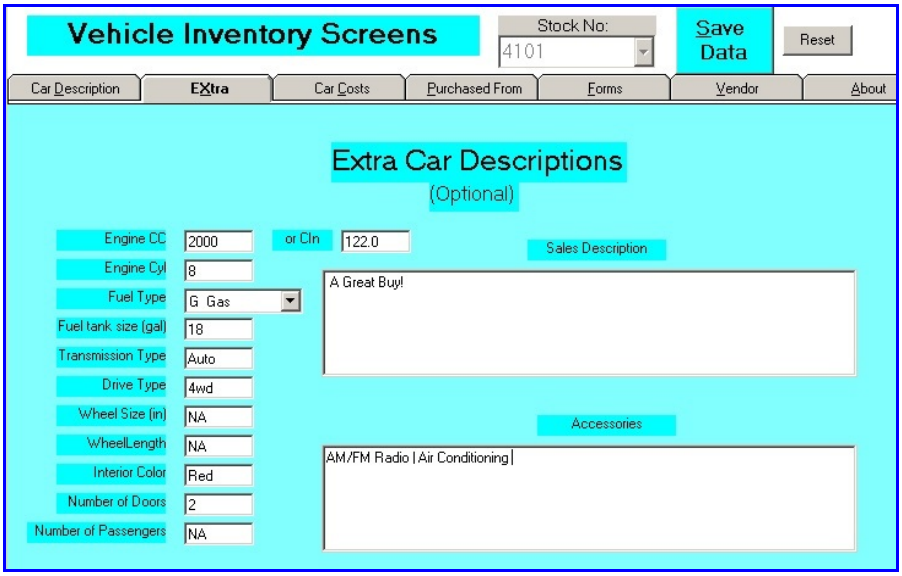


Figure 3.4 – Extra Descriptions

This screen was added in V2.11. It turns out that the State of Washington and others keeps wanting more and more information about a vehicle. I ran out of real estate on the Car Description screen, so this is an overflow of that screen. Everything here is optional, so you do not have to enter any of this information if you do not think you will need it. If you do not enter anything, if a form needs the fuel type, we will assume Gas.

The Sales Description is intended to populate a web site's propaganda area. The Accessories box is also for that use, or for creating a flyer for the car. In some web site cases, the delimiters between the various names need to be a certain form. I have used the OR symbol "|" here.

Part 4 – The Car Costs

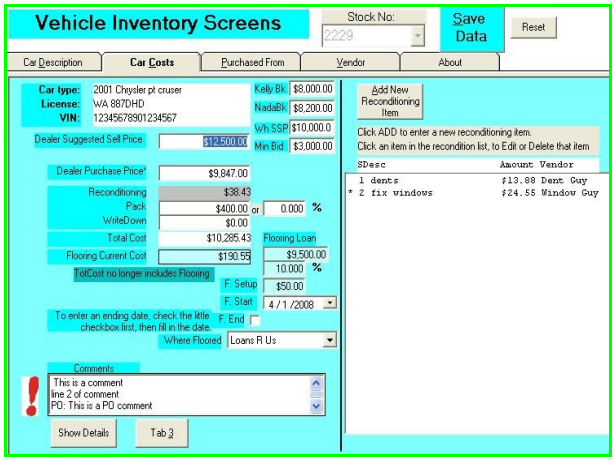


Figure 4.1 – The Car Costs screen

When the car description has been entered, click either on the Next Tab button, or the Car Costs tab. This brings you to the screen that allows you to enter your costs of the car.

Note that there are two versions of the Inventory program, the Full Inventory and the Salesman Inventory. The difference is, the Salesman version does not show any car cost information that appears on this screen (see figure 4.5). You would only see the Dealer Suggested Price.

To the upper right you can enter the **Book Values.** This is a place to put the car's book value for later reference. We have slots for both Kelly and NADA values. These are Optional, and you will have to find this information from the reference books. I do not have a way to provide it to you.

Below that is a **Suggested Wholesale Selling Price**. This will print out on certain reports, and is useful when you might want to sell a car either retail or wholesale.

Below that is a **Minimum Bid**. This was put in for use by our Auction module, and indicates the minimum bid that would be accepted during an auction.

Below that is the **Field Upload flag**. It is used in the Feed Upload utility program.

The left side of the screen shows the dealer cost information.

You can enter a **Dealer Suggested Price**. This value will show up in the Deal screen later. It is optional.

You must enter the **Dealer Cost** value, how much you paid for the car.

The gray background box in the third line is the total value of all the reconditioning done to this car. This value will be filled in as you add reconditioning costs to the car, as explained below.

The **Pack** defaults to the default value for Pack at your dealership, and the default can be changed in the Admin screen for all cars, or changed here for this particular car. It can be changed in the Deal screen. Pack is the catch-all for all the overhead stuff that the cars have to pay for, like power bills, rent, and all that. It gets subtracted out of the overall profit for the car

(and the Salesman's commissions), and from the point of view of Quickbooks, provides you a slush fund to pay these various bills out of.

Pack Percent allows you to calculate the pack as a percentage of the car cost. The pack will be the Larger of either the default pack or the results of this calculation. This box contains the percentage value to use, and has a default value.

The **Total Cost** is the sum of the Dealer Cost, Reconditioning, and Pack. It does NOT include the Flooring cost which is described next.

Flooring is the cost of the Dealer's loan to buy this car and let it sit on your lot. This value is calculated from the data entered to the right. We need to know the **Flooring Loan**, the amount of the loan that was obtained for this car. We need to know the **Flooring Loan Rate** (on an annual basis). Note that if this rate increases over the life of the loan, you will have to enter some sort of average rate value. We also need to know any **Flooring Setup Charge** that may have been needed to get the loan. Finally we need to know when the **Flooring Loan started**, which may or may not be when the car was bought.

The flooring value, when there are non zero loan values and a starting date, is calculated on a non compounding daily rate between the starting date of the loan, and the current day. This value does NOT enter into the profit calculations in the deal screen, although the value is shown on the deal screen. When the loan ends, then the Flooring End Date can be entered by checking the little checkbox next to the Flooring End Date box and entering the actual ending date of the loan when the ending date box becomes visible. Note that you should use the calendar that pops up when you click on the little arrow at the right of the box, and not enter the value via the keyboard. If you do use the keyboard, you must use the arrow keys on each field (month, day, year) and NOT enter the value numerically. Don't know why, this just seems to be the way that MicroSoft controls work. When the final cost of the loan is actually known (like, when the check gets written to the bank), this value should be entered as a reconditioning value against this car. At that time, the flooring loan value will be subtracted from the profit on the car.

Finally, we can indicate what bank provided this loan (Where Floored). This information can be useful for some reports in the Admin program. The bank must be entered as a vendor, and the "Bank Information" radio button must be clicked, to appear in this list.

Below that is an area where you can enter **Comments** for this car. These same comments will be available in the deal screen for this car, and can be modified there too. The Deal screen will allow these comments to be copied to the clipboard, so that you can move these comments to some other program, such as Quickbooks. This Inventory screen does not provide for such copying to be done, due to a funny quirk of the Microsoft VB Language.

Reconditioning data is on the right side of the screen. The default view is to see a list of all the

reconditioning items entered so far for this vehicle.

You can add as many reconditioning items for a car as you like – there literally is no limit. Click on the **Add New Reconditioning Item** button (or type an Alt A -- note that any button on the screen where there is an underlined letter, indicates that if you type the Alt key and that letter simultaneously, that this is the same as clicking the button.)

Figure 4.2 – Reconditioning Entry Screen

When you do this, the reconditioning entry screen appears, with no data except an indication that this will be a New item.

The Current date will default in the **Date** field, but you can change it to the actual date when the work was done, or when the invoice was received.

Enter a **Short Description** of what the work was on the next line (a Longer Description can be entered at the bottom of the form if you like, but that is optional). When you enter this field and type a couple of letters, a list of all the previous descriptions will show up below it (Figure 4.3). To select something from the list, arrow up or down, and then arrow right to make the selection. (Or double click the item.) If you end your typing with a Tab, then what you have typed will be entered, just like previously. So, right arrow selects, tab enters.

The **Done By** line is a drop down combo box, and you Must select a vendor from this list. If the vendor for this piece of work is not listed here, there is an Add Vendor button, described below, that you can click to add this new vendor to your list of vendors.

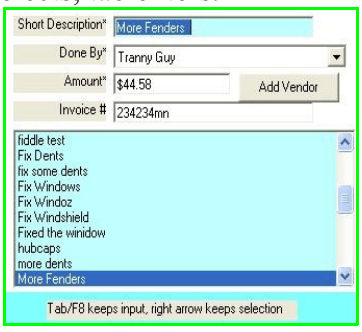


Figure 4.3 – Short Description Dropdown List

Enter the **Amount** on the next line. Note that everything up to this point is required. The following two lines are optional.

What you put in the **Invoice Number** entry is optional, but it could be the actual invoice number sent to you by the vendor, or more often people put the actual stock number of the car in this entry for Quickbooks reasons. We will default the stock number of the car into this field.

The **Long Description** field is essentially unlimited. You can put in whatever strikes you in this field, or nothing at all – it is optional. It will only appear on this screen, and not in any report (as yet). If there is a long commission, an asterisk will appear next to the short description.

Finally, when you are done entering your data for this reconditioning entry, click on either the **Update or Reset** buttons at the bottom of the entry screen, which are enclosed in the Red border. (You can also use an Alt P for the Update). Update puts this data into the database, and Reset erases everything and you have to start over (for this entry).

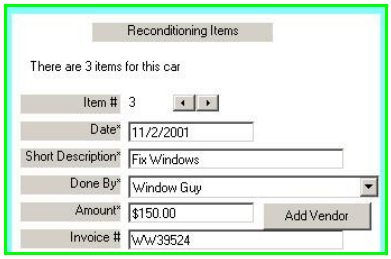


Figure 4.4 – Reconditioning Entry Complete

To change (or Edit) an existing item, simply find the reconditioning item on the default screen, click it, and then click the Edit button that appears. Change any field on that screen. As soon as you change something, the Update/Reset buttons will appear. You will have to click one of them to exit this screen.

At any time, you can Delete a reconditioning item by clicking on the Delete button when that item in the list has been clicked. You should be somewhat careful about using this feature, since once it is gone, it is gone.

The normal kind of reconditioning is obvious – fix the windows, dents, paint the car, buy parts for the car, detail the car, all that sort of thing. However, there are a couple of other types of activities that we throw into the reconditioning pot as well.

We also add commissions paid to people who buy cars for you in the reconditioning area, rather than as some line item under the actual car cost. This way we can keep track of who got what commissions, how much we have to write checks for, and so on. Note that when you enter the vendor information (see next chapter) that there is a place to indicate the type of vendor.

Reconditioning records can also be created by entering a cost into a Due Bill form in the Deal program. That data will show up here with Due Bill being the short description. The presumption is that when you are negotiating the deal with your customer, and the customer asks for something that he will pay extra for, you will create a Due Bill form, enter a WAG for a cost before you know the actual cost. When the actual bill comes in, edit the real reconditioning item, with a real vendor and a real cost. Note that this item will not be exported to quickbooks until this update has been done in the inventory program. This prevents double dipping the quickbooks costs. If there are two pending deals for a car, each with Due Bills, each with cost items that are different from each other. I can't prevent that. It is up to the user to make sure this event does not happen.

There is a button on the lower left that is labeled "**Show Details**". In the Full Inventory screen,

by default all of the above information is displayed. Clicking on this button will make invisible everything but the comments box and the Dealer Suggested Retail Price. Clicking on this button again will redisplay the hidden information.

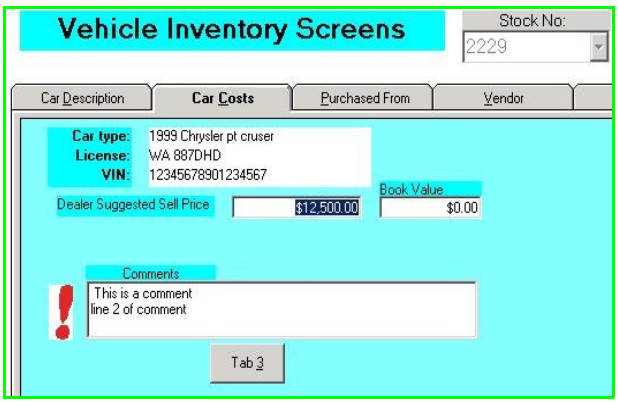


Figure 4.5 – Salesman Cost Screen

There is a variation of the Full Inventory program named the Salesman Inventory program. This program will Never display the cost data, nor will it have a Show Details button. This allows the dealer to let a salesman enter the bulk of the car information into the inventory, making the sales manager only have to enter the more sensitive cost information later. (Flag is SalesmanSellCar.)

Part 5 – Print Inventory Forms

There are several forms that could be printed by the inventory program. We have a button on the first page to print the As Is or buyer's Guide form. But any form that does not require customer information could be printed here. We just did not have the infrastructure to do this, till now.

I have added an extra tab, between Purchased From and Vendor, named Forms, just like in the Deal program. The admin/Car Forms utility has, for at least one revision, had the ability to declare that a form can be used by the Inventory program. Up till now, that was used only for the As Is form.

Now any form that has been defined to be an inventory form (this does not exclude it from being a Deal form also) will show up in this Forms tab. It looks rather like the Deal Forms screen. You select a form to be printed, and click the Print button. You will get a pop up message asking for a printer to use, and it prints.

The good news is, the system can handle Scanned and Text Based forms. The bad news is, it can Not handle the older Code based forms. So any forms that will be printed here must have been converted to the newer Text Based forms. It can also handle FormLetter forms.

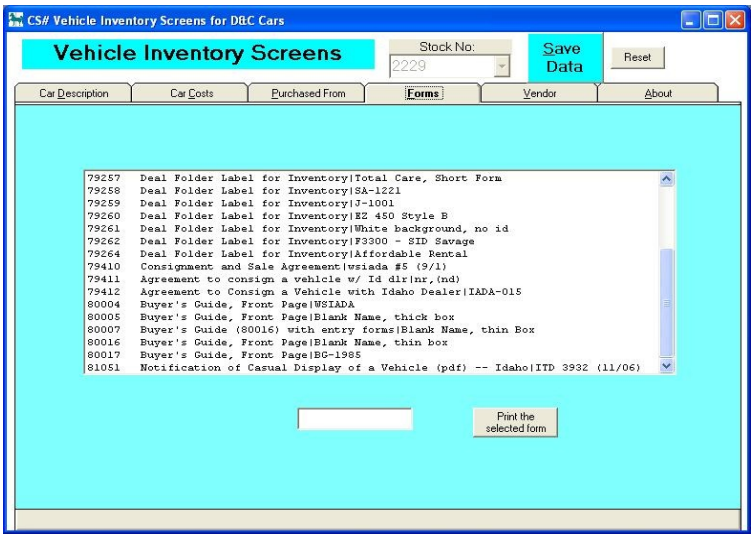


Figure 5.1 – Forms Page

Part 6 – Add Vendor

Vendors do reconditioning, by my definition. (If you bought a car from some company, that company is a Customer, and not a Vendor, by my definitions.)

We presume that you will have a rather constant list of vendors that you work with for the reconditioning that you do. When you first start to use this system, you will have to enter them quite frequently, but as time goes on, this will occur less and less. You can enter vendors in a batch using the Vendor tab of the inventory program, but more likely you will find that a vendor you need is not there when you are entering a reconditioning item for a car. Rather than have to leave what you are doing and go to the other tab, we have provided an Add Vendor button (next to the Amount entry on the reconditioning screen). Click this button whenever you need it.

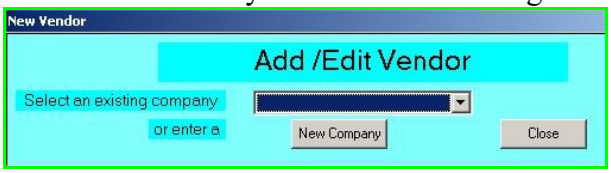


Figure 6.1 – Opening Screen

You will get an Add Vendor screen popping up. Note that this is a modal screen, and can only be exited by clicking on the Close button. You have the choice of either editing (changing) information for an existing company, or adding a new company. To select an existing company click the arrow in the drop down box. To select a new company, click the New Company button.

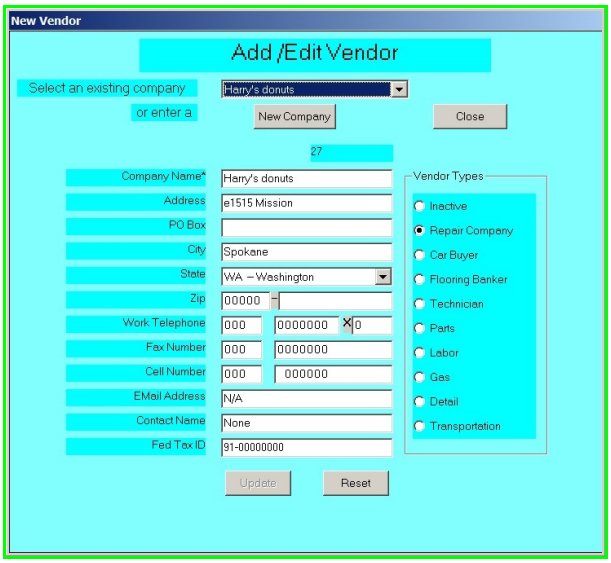


Figure 6.2 – Full Vendor Screen

You will get a screen like the one to the left, populated if it is an edit of an existing company, or blank entries if it is a new company. Fill in the information – only the Company Name is required, but it is your call to enter the other stuff too, for your own information and reference.

The only strange entry is the radio box. There are several choices. The default value is Repair Company. If this vendor is somebody that you pay commissions to, to buy cars for you, then check the Car Buyer box. You will need to add these guy's commissions as reconditioning items. If this is a bank that you get flooring loans from, then check the Flooring Banker item. You can also declare a vendor to be Inactive, so that it no longer shows up in the prompt screens The rest of the choices were put in for a specific client who wanted to more narrowly track who did what repair. You of course can do this too, but it is optional.

When you are done, you must click either Update or Reset. To get out of this screen, click Close. If you close without doing an Update, you will lose your new information. Note that there are no controls in the upper right corner of the screen, so you cannot get out that way. This is a modal screen, which means that nothing else can be used in the system, except this screen, when it is up.

Part 7 – Purchased From

You can acquire a car from many sources – auto auctions, trade ins, direct purchase. At any rate, you want to keep track of where the car comes from, just as you want to keep track of who you sell a car to. In both of these cases, I treat these people – the buyers and the sellers of your cars – as customers. The database has a customer record type set up, and buyers and sellers both are entered into this record type.

Both the Deal screen, and this Inventory screen, allow for the addition of customers, although here they are called **Purchased From** people, which you can see on the Purchased From tab. The data is the same, and in fact, since you can buy and sell a car to the same person, the same record data will be used.

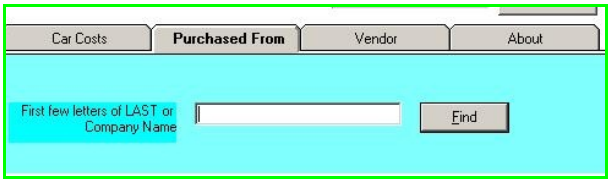


Figure 7.1 – Initial Customer Entry screen

You can either select an existing customer, or you can enter a new one. When you first click on the Purchased From tab, you will see the Find screen to the left. Enter the first letter, or few letters, of the person (or company) that you are buying this car from, and click the **Find** button. A screen will appear listing all the people (or companies) that match these letters in the first few letters of their last or company name. Note that you can type from 0 to as many letters as you like. 0 gets you a complete list. The more you type, the smaller the displayed list will be, up to displaying nobody. For a new entry, you do not expect to find anybody.

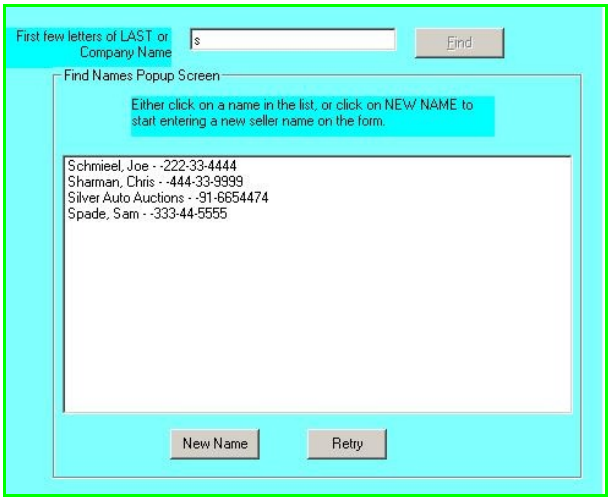


Figure 7.2 – Name Selection screen

From this screen, you can now do three things: select an existing name, click the "New Name" button, or click the "Retry" button.

Clicking "**New Name**" gets you the next screen, blank entries, where you have to enter a whole new customer. Selecting a name from this list gets you the same screen as New Name, but this time with customer data filled in. You can change that data if you wish. Clicking **Retry** gets you back to the Find screen above (Figure 7.1).

Once you are in the New Name or Edit mode, you see a screen that allows you to enter or modify a lot of data relating to this person or company. It is this last part that can be a little complicated. An individual usually has a job, and therefore works for some company, and

therefore generally wants to be reached at his work telephone number. However, companies also buy and sell cars, and that company may have a representative that is your primary contact. So we have provided a little checkbox, next to the company name, to distinguish these two possibilities. If you are buying or selling a car to a company, check the "company" checkbox. Otherwise, leave it unchecked. When you are searching for a customer, the program will search on either the last name of the person, if the checkbox is unchecked, or the company name, if the checkbox is checked.

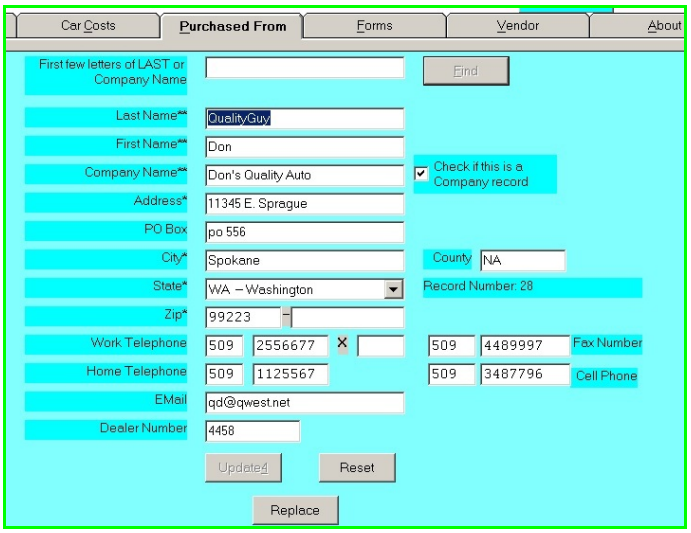


Figure 7.3 – Purchased From Screen

The required data is indicated by the asterisks: name, address, phone number, city, state, zip. The rest of the stuff is optional, although a good idea to enter if you can get it.

In rare cases, the data you entered was wrong. To fix that, click the Replace button. You will get a message about replacing this data. If you click OK, then you will be back to square 1 with this seller, and can either enter a new seller, or find an existing one in the database.

When you have finished with adding the new information, or modifying existing information, then click on the Update button, or click on the Reset button to blow away everything you have done.

Part 8 – Completing the Entry

Figure 8.1 – Top Level Buttons

OK. So now you have entered the car description, its costs, who you got it from, and what you have done to the poor thing. And you can blow it all, if you do not follow this final little step: *You must click the Save Data button at the top of the screen*. If you try to exit without doing that, you will get a message asking you if that is what you really want to do (figure 8.2).

As the figure above shows, you have the various Tabs to play with, as we have been describing. We have the Title of the screen (Vehicle Inventory Screen), the stock number entry box, and an Update and Reset button. Whenever you enter any data into the system, with the exception of Reconditioning data and Purchased From and Vendor data, to make it stick, you have to click on this **Top Level Save Data** button. The reason that the Vendor and Reconditioning and Purchased data does not need to have this button punched, is they do have their own Update buttons on their screens. But the rest of the data only gets written to the database when this button gets clicked.

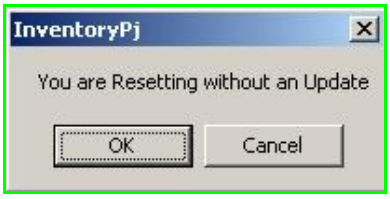


Figure 8.2 – Reset Message with Unchanged Data

If you click the **Reset** button, you will go back to the Opening Screen (Figure 2.1). If you have made changes, and not clicked on Update, you will get a warning message that you are about to kiss off some of your data, and you will have a chance to update it before it goes away if you click on the **Cancel** button of this message. If you click on **OK**, by by data changes.

When you have done an Update on a car, or Updated a Recondition entry (or vendor entry or Purchased From entry), then to get back to the Opening Screen, you do need to click on Reset. Even if you have, say, made a Recondition entry, where you do not Need to click on Update, you still can, just for consistency's sake. The button is active, and it will not hurt anything.

Part 9 – The About Screen

It is traditional in windows programming for a program to have what is known as an About Box. This box tells you what the program is, who wrote it, what version it is, and any other relevant information that the author of the program seems to think you need to know. Most about boxes are hidden in the Help Menu – click on the Help menu item, and generally you will see an entry for About This Wunnerful Program. I do not like, and therefore have not used, menus in this system. So on my screens, not only do you not find a Help menu entry, you do not find a menu bar at all.

Figure 9.1 – the About Screen

All of my programs do have an About Tab, however. Some of the other programs, as we will see, give you quite a bit of information. At the moment, the Inventory program simply tells you what the version is of the program that you are actually running.

It is traditional in the programming biz to have a major and a minor number for each release. The first number, before the decimal point, indicates a major change of functionality when it changes. The second number, after the decimal point, simply indicates that some sort of change has been made and released to the eagerly awaiting world. Most of my changes would affect the minor number.

Generally, I try to keep all of my programs at the same revision level, just to keep things simple. I also generate a change list, which lists out all the changes to the program made between releases. These are found in the splash screen Documents section as the very first item in the list, and is named #V2.xxChanges.

Part 10 – Utility Functions

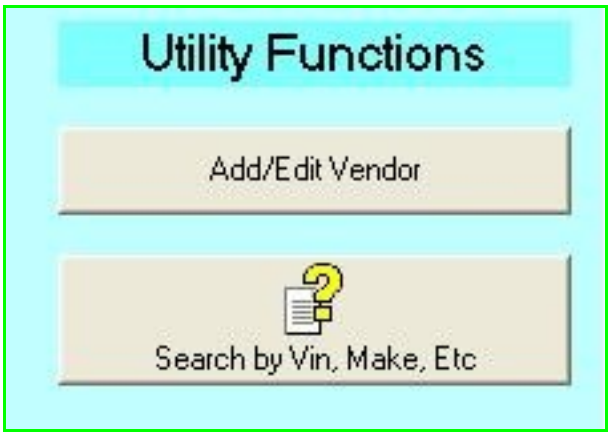


Figure 10.1 – Utility Buttons

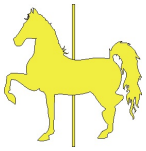
We have provided two utility functions here. I suppose they could have been put anywhere, even made into their own little mini programs, but for now, here they are. They sort of make sense to be part of the Inventory, sort of, if you don't think too hard about it.

Anyway, they are the Search function, and the Edit Vendor function.

The Add Vendor button brings up the same exact screen as was described in Part 6 of this document. It is simply a different way to get at it (eg you do not have to be processing a car currently to get at this function).

The final utility is the Search Screen, which will be described in the next section.

Part 11 – Inventory Display Program



Both the Deal and Inventory program have a utility function named the Search Screen. This same utility also stands alone, and is called the Inventory Display Screen (aka the Yellow Horsey). It lets you find a particular car or set of cars from your entire inventory, either unsold, sold, or both. For all practical purposes, the exact same program provides the functions for all three displays. The main difference is that the stand alone version has a yellow background, the Inventory one has a blue background, and the Deal version has a lilac background.

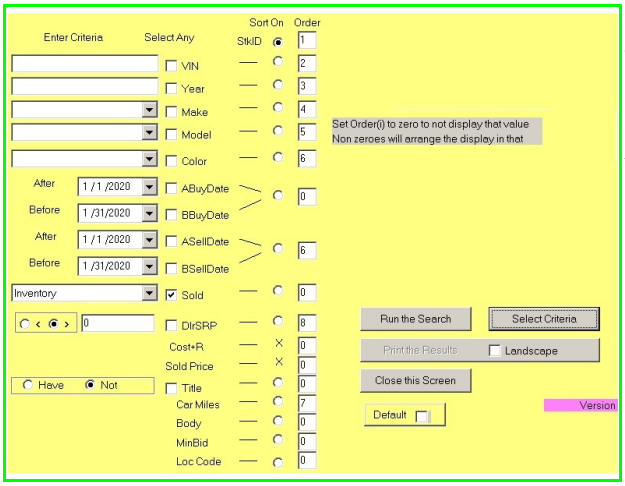


Figure 11.0 – Search Screen

This screen lets you search the entire database of vehicles, and find all cars that match selected criterion. You can search on any or all of the following, depending if the appropriate check box is checked:

- VIN – any consecutive set of characters, at any part in the VIN
- Year – must be a four digit number
- Make – must select from the dropdown list
- Model – must select from the dropdown list
- Color – must select from the dropdown list
- Buy Date (Before) – find a car that was bought on or Before the selected date.
- Buy Date (After) – find a car that was bought on or After the selected date
- Sell Date (Before) – find a car that was sold on or Before the selected date.
- Sell Date (After) – find a car that was sold on or After the selected date
- Sold – can be either Sold, In Stock, or Complete (pending deal).
- DlrSRP – Dealer Suggested Retail Price. Note the radio buttons to the left of this, allowing you to select Less Than (<) or Greater Than (>).
- Cost + Reconditioning (display only, not in Salesman version)
- Sold Price (display only, not in Salesman version)
- Title – can select either Have or Have Not title (from checkbox in car description)
- Car Miles (display only, for now)
- Body type
- MinBid – displays and potentially sorts the value in the Minimum Bid entry in the Car Costs. This was put in there for auction use, but you can use it for anything you want, as long as it is a currency value.
- Location code – whatever is in the location code of the Inventory program.

In order to do a search, you must a) check the box for the criteria that you want to do the search on, and b) enter the criteria in the field to the left of the box. You can check multiple boxes, and they will AND together. Nothing counts if the item aint checked. Note that the searching is done by ANDing, not Oring. That is, the search becomes more specific, that is, excludes more items, and not more inclusive. Entering data in the fields with a box not checked will NOT enter this value into the search criteria.

We also allow you to select the sort order, using the radio buttons on the right of the screen. You can sort on only one thing, and Stock Number is the default. Cost and Sale Price cannot be sorted on, but Dealer SRP can be.

We also allow you to select just what will be displayed on the screen when the search is finished. There is more information available than can easily fit on one line of the screen. So the column of boxes on the right of the search screen allows you to select what displays (by a non zero number in the box) and in what order (the sequence of numbers in the boxes).

There is a Default button on the bottom right. What displays initially is hard wired into the program. If you should want to change the default display, do that by fiddling with the Oder boxes, and then preserve that as the default by clicking the Default button. Note that it only changes that for the current computer, not other computers on the network (eg, this change is in the registry, not the database). To go back to the default order, check the box before clicking the button.

Having both Before and After dates for buying and selling the cars allows you to pick a car that was, for instance, bought between two dates. Leaving the After date out would pick a car that was bought any time after a certain date.

To run the search, click the “Run the Search” button. You can print the results screen out by clicking on the “Print the Results” button. And the only way to leave the screen, is to click on the “Close the Screen” button. Note that we now provide for a Landscape printing option.

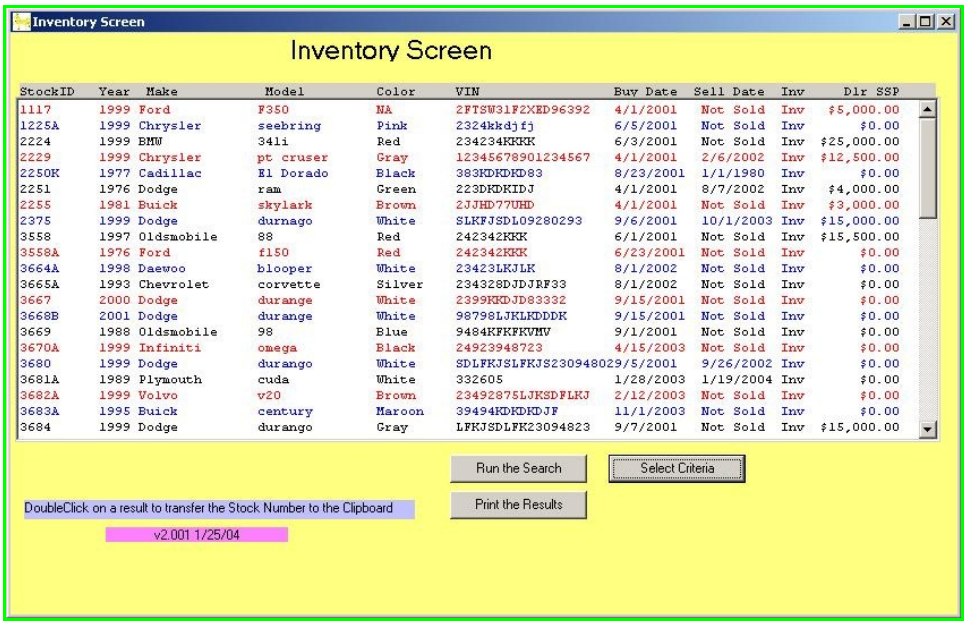


Figure 11.1 -- Search Results Screen

If you leave the screen, and then come back to it later in this session, these results will still be there. You can change the criteria and run the search again, or just stare at the wonderful results that you got last time.

When you get a set of results, if you double click on one of them, then that StockID will be put in the clipboard. In the case of the Deal and Inventory versions, the screen will be closed, the main program restarted, and that selected result will be transferred from the clipboard to the StockID Entry box. I emphasize that the clipboard is used, because if you should happen to have something in the clipboard, it will be wiped by this feature. In the case of the stand alone version of the program, the data remains in the clipboard, but you will have to paste these results where you want them.

And that is why you can go back to this screen, with the previous results. If you want to make a bunch of changes to a set of cars, find them with this screen, double click the first line, make the changes, then click the search button again, and you do not even have to rerun the query – just double click on the second line, and continue on.

However, if you should forget that you have done this (like maybe an hour ago), and come back to run a search, those previous selections will still be there, assuming you have not restarted the program. So you might get some funny results if you do not look at what is selected.

By default, when it comes up it displays all cars currently in inventory, in lot number order. This

default can be changed using the InvSort field of the Defaults tab of the Admin program. This tab allows for changing the Admin Inventory sort order, the Admin Management sort order, and the sort order for these screens. You put the following digit into this field, followed by four zeroes to change these screens. The following digits apply:

0 -> Stock Number (default)
1 -> Vin
2 -> Car year
3 -> make
4 -> model
5 -> color
6 -> purchase date
7 -> dealer suggested retail price
8 -> odometer in

On some computers, this data will have a different color per row of data. On others, it will be a black and white display. It sort of depends on the computer. For some reason, some will do color rows, and some will not. I don't know why there is a difference. I suspect it is in the DLLs. If your computer does support the colored rows (most Windows XP computers do), enter the word "colors" in the properties of the icon. I know that this means nothing to most of you, so if you want this feature if you don't have it, call me and I will walk you through how to get it.

There is also a print button, that will print the selected data, in color if you have a color printer. Some clients like to use the printout version of this tool as an inventory report sheet. While that can be done, you should know that there is a set of Admin Reports that are specifically designed to do this – the 500 and 600 series reports. Getting a report by using this Search tool does allow you to sort of customize your own reports. However, you will not get totals at the bottom of the report.

Note that if you add data to the inventory, that you will have to rerun the search to get the new data. It does not automatically update itself.