Weird Things and FAQs
Version 2.010 November 2014

Most of this program is, I hope, intuitive. With a little training on the system, if you have a normal car deal, maybe even with a tradein, everything should roll right along.

But there are a few things that come up only every now and then, that this program can take care of, but which the gentle user probably does not remember how to do. And there are a few results of the program that look sort of strange, but generally are correct, if you just look at the deal the way the program looks at the deal.

So I want to used this document to keep track of these little known factoids.

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1. *Why does a Date of sale exist on an unsold car?*

I have been asked to provide a default date of sale for a car. The default date will be the initial date of the deal So if you have a pending deal, it will have a date of sale on it, but it will not yet be sold. This will mostly be confusing in the Inventory reports.

 2. *How do you return a car to the buyer?*

Especially when you are dealing with other dealers or the auction house, from time to time a car that you bought has to be returned. Or a consignment car that never sold. But you do not want to delete the car from inventory, since it was there for a period of time. But you also do not want to show that the car was sold, because of B&O tax reasons.

The Admin program has a button on the first tab that says "Consignment Giveback". Enter a stock number in the box below it, and this function will delete the car from the production tables, and store the car in the "Consignment" table.   If the checkbox in the button is checked, then it will bring the consignment back from its purgatory table.   You cannot do a consignment giveback twice for the same stock number.

3. *Tell me about Consignment cars.*

A Consignment car must have its consignment checkbox checked when the car is entered into Inventory. This check prevents the car from rolling into Quickbooks. When the car is eventually sold, the selling process will remove the check and flag the car as needing to be rolled into Quickbooks at that time. If a consignment car needs to be returned to the seller, there is a button in the Admin screen that will remove the car from inventory without actually selling the car, and without rolling the data into Quickbooks.

4. *What do I do when a Salesman leaves?*

We have a salesman table in the database, which you can access from the Admin Screen, Tables Tab, Salesman Button. The rightmost column of this table is the ActiveStatus flag, which is 0 for somebody that has quit, 1 for an active salesman, and 2 for the one person who is legal to sign documents for the agency. This is usually the finance guy. When a salesman quits, bring up his record in this table, and change the activestatus flag to 0. Note that we do not want to delete the record, because cars that have been sold will have pointers to this record, and if the record does not exist in the database, funny things will happen.

The same things are true for old bank that you no longer use, old warranty companies, old gap companies.

5. *Why Can't I Sell a Car for $0.00?*

It is because the way the program logic works. You cannot get to the Completion tab of the Deal screen until you have a non zero selling price. If you cannot get to the Completion tab, you can't sell the car..

6. *How do I find the cars that a customer has bought*

There are two ways.

First there is a report in the Admin program called the Customer Purchase Report, that will list all customers and all the cars they bought for a specific period of time.

Second, if you click on the car icon in the Deal screen, and then Find a specific customer, you will find a button labeled "Find cars for this customer". If you click that button, a list of the stock numbers of cars that this customer has bought will be displayed. Double clicking on a stock number will bring up that deal.

7. *How do I find the customer for a car?*

 It is easy to find the buyer for a car, if you know the car's stock number. Simply pull up the deal and see who the buyer is. However, if you are looking for the spouse, child, or cobuyer for a car, this will not easily work. We have provided a simple utility, "FindCars4Cust" that will let you enter the first couple of letter of the last names of any of these people, and it will tell you what cars they have a connection to.

8. *Why do I sometimes get stuck in the Customer screen?*

There is a limitation in the tools that I used to create these programs, of 256 objects on a screen. The deal screen, including all its tags, exceeds that. So when you are in the Customer or CoBuy stabs the only way out back to the main screen (including the Gang Reset button) is either an Update or a Reset on the customer or cobuy tab.

Note that this also applies to the Tradein screen, for the same reason.

9. *How do I get rid of a trade in the Deal tab of the Deal screen when the customer changes his mind about the tradein?*

You entered the trade in information by clicking on the TradeIn button. That uncovered the input box to allow you to enter your offer for the customer's tradein. There is a button on the lower right of the tradein information to remove the tradein.

10. *How do I make a deal started in QuickQuote into a real deal?*

Bring up the deal in the deal screen, select the Quickquote customer, then go to the Buyer tab and

change his name and add in all the details. If there is a tradein, go to the tradein tab and add in all those missing details. If you quoted a warranty or financing on this deal in the Quickquote screen, you will need to select the warranty or finance company on the deal tab. When you update all this information, the deal will retain all the other information you entered in the Quickquote screen (like price of car, price of tradein, and so on).

11. *Any problems with creating a tradein deal in quickquote*

The above FAQ shows you how to create a deal in quickquote, and change the quickquote name to a real name. You can now do a Find of an existing customer already in the database. There is a problem, however, if this customer already had real tradein data, and if the quickquote deal also created a tradein. There is no way for me to know if the quickquote tradein record is also one of the customer's existing tradein records. So a new tradein record is created. You now have two choices. You can either enter all the specifications for this tradein (make, model, etc) using the tradein tab. Or if this tradein already existed for this customer, you can delete this quickquote generated tradein, select the existing tradein, and enter the price information on the deal screen.

12. *How do I get rid of all the QuickQuote customer names cluttering up my customer list?*

The Admin screen has a button named "Clean up QuickQuotes" that, when clicked, will find all the Quickquote customers who are NOT connected to some car, and will blow them away. Note that when a car sells, all the customer cost data records for any customers that were interested in the car, but did not buy it, are deleted. The customers themselves are not deleted. This is fine for a real person, but not good for these phony Quickquote customers.

13. *Why is the Pack in two different places?*

Pack is the overhead of the dealer applied to a particular car. Usually, it is a default value specified by the dealer (and changeable in the Defaults tab of the Admin program). We give you a chance to change the pack in the Inventory program, and another chance to change it in the Deal program. You may want to change it in the Inventory program because maybe this car is a looser and you want to make it easier to sell. Cars sold to certain entities, like Auctions, or givebacks, never have a pack, but we don't know that till it is time to sell the car, and we are usually in the Inventory program at that time. The pack is stored in two different places. The deal program, at the time a customer is selected, sets up a customer/cost record for that car and customer, and fills in the pack with whatever is in the car/cost record (from the inventory program) at that time. If, later, you change the value in the inventory screen, this change will NOT be reflected in an existing deal. However, later deals will see this change.

14. *What if a dealer has more than one dealer number?*

A dealer number of 0 will print blanks where the dealer number is called for. You will have to

write in the correct number. In recent versions of the software, I now have a place for trailer, boat, motorcycle and wholesale dealer numbers, in addition to the traditional retail license. The proper one will be selected by what you said the vehicle type was in the inventory program when you stocked this vehicle in.

15. *Why doesn't the year part of the Date Entry Control work?*

The date control are the little boxes where when you click on the arrow to the right, you get a calendar pop up to let you select a date. You can also change the date values directly, but the control has one problem (possibly a bug, but I did not write it –) to change the Year, you must finish with a Right Arrow, then a Tab. A TAB alone seems to not enter the year you typed. Change the year with the Up or Down arrows. Note that the month and day values can also be changed with the Up and Down arrows, but entering a number in these fields seems to work properly, unlike for the year field.

16. *Native American Checkbox only works when the deal is initially made*

If you are making a deal with a Native American, and the car is being delivered to a reservation, then (at least in Washington) you do not charge him sales tax. I have a checkbox on the customer entry screen to indicate this. However, it will zero the sales tax ONLY if the box is checked before you enter the deal tab the first time for a particular car and customer. That is, if you enter a new customer, do not check this box, click update, you have started the deal and will be in the deal tab. If later you check the Native American checkbox, it will not zero the sales tax

17. *What is the Sequence Number on the TradeIn screen?*

This is a number that I use to keep track of this trade in within the database. You do not need to know about it, but I find it useful to show it if some problem comes up and I need to go into the database to fix it. There is a similar number in the Customer screen too.

18. *Why do we export $5 to Quickbooks when there is a $0 purchase price?*

Quickbooks will not display an item in its reports if the value is zero. Some people do not enter the purchase price of a car right away, and so we export a $0. However, then you can never find this bill in Quickbooks. So we translate the $0 to $5 on export only, so it will show up in Quickbooks.

19. *How do I sell a warranty to a client, without selling them a car too?*

This is a little complicated, but the following should work.

    a. Enter the car into inventory. Give it a funny stock number, like WARmmddyy.
    b. Give it a dealer cost of $0.00.

c.Enter the deal information, including price of the car, and warranty information.
d.Print the warranty paperwork.
e.Make the price of the car $0.01.
f.Print the purchase order.
g.Sell the car
h.Export the data to Quickbooks.

20. *Washington State Sales Tax Factoids*

There are a few funny things to note about sales tax. First, the state of Washington requires sales tax to be calculated for Warranties, but at a different rate than the tax for the cars. The sales tax for the cars is the local sales tax, plus a 0.3% (currently) addon for car sales only. The Warranty sales tax does not use this addon. So, there are now two sales tax rate boxes displayed in the Deal tab of the Deal screen. The one on the left is for warranties and anything else that is taxed at the not car rate. The one on the right is the one for cars.

Out of state customers are still charged the Washington sales tax for warranties for Washington dealers. It is a dealer option on what he does with the car sales tax. He can decide not charge it at all, and then let the customer's out of state DOL deal with it. Or, we have a default value for out of state customers for the car tax. So, for instance, you could set this out of state value to 6.0%, the value for Kootnai County in Idaho. This is something that the bank loan people really like you to do, to make sure that the bank gets paid.

It gets even more interesting when it comes to Native Americans. While Native Americans do NOT get billed for sales tax on a vehicle as long as that vehicle is delivered to their reservation, and it has to be the correct reservation for his tribe. They DO get billed for the warranty sales tax. Note that a Native American DOES get billed for sales tax if the vehicle is NOT delivered to his reservation.

Note that in Idaho, sales tax is billed on the Doc Fee.

Please see section 43 of this document for information on B&O Tax.

Carousel Report 900 generates a report that will greatly help you fill out your Monthly Sales Tax and B&O Report, because it knows about all these rules.

21)   *Tell me about Sales Tax Offset?*

In Washington, a tradein's value subtracts from the car price value when calculating the sales tax. However, it must be like for like. That is, a vehicle and another vehicle will work, but a vehicle and, say, a boat will not. That is, if you get a boat as a tradein on a vehicle, you have to charge the full sales tax on the car price. Or vice versa. If you sell the boat, and take a car as a trade in,

full price. But if you sell a boat, and take another boat as a tradein, that works.

The state has divided vehicles into six categories: motor vehicles, trailers, Rvs, boats, snowmobiles, and miscellaneous. You can have a sales tax offset of like for like within a category. Looking at category A, this includes not only cars trucks, motorcycles, but also mopeds and ORVs. Thus, a 4 wheeler does allow for a sales tax offset for a car, whereas a boat or trailer does not. Furthermore, ORVs do not get charged the 0.3 percent extra sales tax for cars. So I have modified the logic for now to accommodate these insights.

If for some reason you believe that a sales tax offset should NOT occur, then check the Leased box in the tradein screen. You never get a sales tax offset for a Leased vehicle.

Note that in Idaho, there is no such restriction, and you get the sales tax offset for anything that your customer drags in and you are willing to take in as trade. Even something that eats.

22)   *Why is there a "leased" checkbox on the tradein screen?*

For some funny reason, the state presumes that you never paid sales tax on a leased car. So when a leased car is used as a tradein, it is not allowed to be used as a sales tax offset. Checking this box makes all that happen.

23)   *Can I have several companies hosted on one computer?*
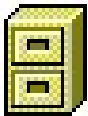
We have provided a program that will let you switch databases on a computer. We presume that all the databases live on the same server, and that they are all Access databases. Using the ODBC Switcher program, you will see a list of all the databases on your system. Click on the one you want, and click on the Switch button. If you minimize this program, the icon tells you which database you are using. Note that you cannot do this when other Carousel programs are running on your system – you will get a warning. All Carousel programs must be pointing to the same database from a workstation. With the extra security built into Windows 7 and 8, the ODBC Switcher Program only works when Run as Administrator, in an administrator account.

24)   *What do I do if I have printers on different workstations that are not the same?*

Printer configuration parameters are stored in the Defaults area, and can be changed in the Defaults tab of the Admin program. But that assumes either only one printer per site, or that all the printers on the site are identical and are adjusted the same.

If for some reason we have two non identical printers at one site, then each workstation that has a printer will need to somehow know its printer's parameters. The defaults database that exists will not do this.

Every workstation has a thing called a Registry, where Windows (and any Windows programs) can store data. I have written a program named PrinterConfigPj that will do this for the printer parameters.
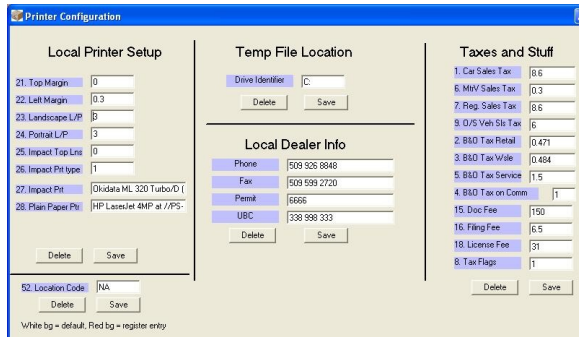
When this program comes up, it reads the default parameters off the database and puts them in the various fields. It then sees if there are any parameters in the Registry area, and if there are, puts them in the fields too, but colors their backgrounds red.

You can then go and change any fo the parameters. The background will turn Cyan. When you click the Save button, the data is written to the Registry.

If you would want to blow all this data away, then click on the Delete button.

This program has now been enhanced to deal with items needed if a client has a 2nd store in another location, even out of state.

25) *What do I do if I do not have a C: drive on my computer?*

I have added a parameter to the PrinterConfigPj program (above) that allows you to change where scratch files will be located. I always assume that I can use C:\temp as a scratch file. If the C: drive does not exist (like for dual booting reasons), then you can change the drive location (eg to I: for instance). I still assume that there will be a folder named "\temp" on that drive.

26) *What is the Change Log program?*

Starting with V2.006, I have added a table in the database that lets me keep a log of changes that I have made to a customer's system. This also lets the customer put down a log of problems or suggestions that they find. I will see this the next time I come to visit. All entries are timestamped. Used the special Change Log program to enter this information. All entries must fit on one (100 character) line.

27) *Why can't I have more than five workstations?*

Microsoft's Windows 2000 Professional and XP operating systems only allow 10 network connections per system. This is a completely arbitrary limit, since in the Windows 2000 Server OS, which was essentially identical (but cost more) to W2K Professional, which allowed any limit. For some reason, hitting the MS Access database requires two connections, giving you a limit of 5 workstations. To get more, you have to pop for Windows Server 2003 (for over

$1000). Windows 7 and Frankenwindows now support 20 connections, or 10 workstations.

28)   How can I legally charge a Credit Union membership fee?

It has been illegal in the state of Washington to charge a credit union membership fee, even if they require it. One way to get around this is to call it a "Credit Union Share Deposit/ Lein Release" fee. Or so some people think. Anyway, if you put a value into the "Membership" field (immediately to the right of the Doc fee), then it will print out in section G on the LAW form, with the funny above title. Note that at present, ONLY the LAW form accepts this.
The WSIADA purchase order form also supports this. We were calling it a "Credit Union Membership Fee", and that is now changed to the more politically acceptable "Credit Union Share Deposit / Lein Release" fee. I do not know how many other purchase order forms support this fee. If you are going to be charging this, we need to discuss the effect on your PO and your Bank Loan forms.

29)   Deal "Add Customer" button

Many new users of our software get confused on how to add a customer to a deal. The customer drop down box shows an "Add Customer" line item, but this can be confusing since the CBO box also shows this, and you must click on the lower entry. I have now added a blue box, which will appear only when customer selection is in progress, that you may click in stead of the "Add Customer" CBO item. It does the same thing. However, for some reason I have not yet figured out, you must click the button TWICE.

30)   Is there a way to have a default sort type for the Inventory reports?

Yes, there is a default field (#50) in the Admin/Defaults page where you can set which sort the Management Inventory reports should default to. Its normal state is 0 (stockid). To get the number to use, count the items in the sort dropdown box (starting from 0) till you get to the sort you want. Thus, Vehicle Type is #7.

My public liked that so much, that they wanted a way to default the sort for the Salesman Inventory Report too. So, in the same default field as above (Inv Sort, #50), we will use 0-99 as the Management Inventory Sort default, and 100 - 9900 as the Salesman Inventory Default Sort. That is, put 0-99 (times 100) into the field for the salesman inventory default. So, management sort #1 and salesman sort #3 would be a 301 in the field.

31)   What happens if the network goes down?

Even with wired networks, sometimes the network will not work. This sometimes happens after a reboot of a client, and when it happens, it happens in the morning. Most of the time, the network connection can be reestablished by the following procedure. If that does not work, then life will get more complicated than I can describe here.

1) Right click on Start
2) Left click on Explore
3) The windows explorer window comes up. It has two vertical parts.
4) In the left part, scroll down to almost the bottom, to find something like "auto on K". It will be just above the My Network Places entry.
5) Expand this line by clicking on the + just to the left.
6) Click on BIN
7) Close the explorer.
8) The network connection should now work.

32) *How do I charge Loan Fees?*

You don't. At least in Washington, any loan fees must be added to the price of the car. This includes loan fees for buy here pay here deals, and financed deals where the finance company charges you for a loan. (Note that the cost by the finance company goes into the Lender Discount entry box.) However, if you do insist in having this fee entered as a separate line item, add it into the Additional Items line. This can be set up to be taxable (which you should do, since it really is part of the car) or non taxable. Just keep in mind that in Washington it is illegal to do so, even if you disclose that you are doing it on the purchase order or the contract itself. For more information, please see the Winter 2013 issue of the WSIADA Frontline.

33) *Can I have two workstations doing the same deal at the same time?*

The short answer is NO!. Two workstations can work on two different deals at the same time, but when they both bring up the same deal, you will get a funny error about a table being locked when the 2nd workstation tries to access the deal. The problem will go away when the first workstation releases the deal. If you think about it, it is really not a good idea at all anyway, because the last guy to click the Update button would overwrite whatever the first guy put there.

34) *Logging*

Starting with Version 2.007, I have added logging events to the system. Initial entries to stock number (in the inventory program, for instance) are Not logged. However, any changes to those initial entries are logged. Also, most significant events are logged, such as change a stock ID, deleting a vehicle, and so on. There is a program that will display these logged events either by stock number or customer ID. It is located in the auto\bin\tools folder, and is named LogTlPj.exe.

35) *Balloons on the Deal Screen*

If you are doing Self Financing for your customer, a balloon icon will pop up just below where the interest rate and term are entered. This is for something called Balloon Payments in the industry. It is really a misnomer, since these payments are generally near the beginning of the loan, and not at the end as a Balloon would suggest. When you click the icon, you will get a

screen the lets you put in these, what really are Irregular Payments. If any such irregular payments exist, then the background of the balloon icon will be blue.

36)   *Move an Inventory record to a different database*

A dealer may have two sites, or a lot may have two dealers on it. Sometimes you may want to move or sell a car to the different lot of other dealership. There is a way to do this without reentering all the data:

So, if you want to move a vehicle from Company A to Company B,
a) Select Company A database
b) run report 1120. This generates a file named inventory.txt in C:\temp.
c) assuming everything is on the same computer, select Company B database.
d) run program Add1InvPj. This will display the data in inventory.txt.
e) select a vehicle from the displayed list
f) enter what the stock number should be as known by Company B
g) click on the Move button

If the databases are on different computers, you will have to move (maybe by email) the inventory.txt file created in step b.

37)   *What is Line 3 (on the Deal screen)?*

Apparently the term Line 3 is well known in the industry. It is the price of the vehicle, less the down payment, less the prices of the trades, plus the cost of any payoffs for the tradeins. Banks appear to like this value. It is now being displayed on the Deal screen, just below the age of the car.

38)   *Can I print Receipts?*

We do have receipts for payments already built into the Buy Here Pay Here transactions. We now have a way to print a receipt (on plain paper) for
    Down Payments (form 79001)
    Total Payment of the Vehicle (form 790023)
    and Pick Up Payments (form 79003)
This latter will print out all the paid and pending pick up payments, not just the payment made.

39)   *F8 Key Choices*

The F8 key is used to add a new entry to the Make, bodystyle and color lists. On some computers this does not work. Sometimes Control F8 will work. Or use the insert key. Or a question mark.

40)   *What do you do about boats and trailers?*

Boats come with trailers and engines that must be described. This data, at least for now, will go in the vehicle comments section. BT: will be a code for the Boat Trailer, BM1: and BM2: will be codes for the up to two engines. You can define a serial number with -s, a make with -m, horsepower iwth -h, and trailer plate with -p. Note that there are now different forms for the Certificate of Ownership for the boat and separately its trailer.

As of 6/13, there is now a document, "Boats and Trailers" that describes this in more detail.

41)   *How do I change the name of who I bought the car from?*

The last thing you have to do in the Inventory program is identify where you bought the car from. If you screw this up, there was no way to change it. If you changed the name in the screen, that would change the name of every instance where the wrong person appeared. Below the Name, address etc fields, there are three buttons. One of them is Replace. If you click this button, then the current Bought From entry is deleted, and you will get tossed to the Car Description tab. Now you can go back to the Purchased From tab and enter the correct name.

42)   *What special commands are in the Comments field?*

The comments boxes (behind the big exclamation points) are there for anything you want to use them for. However, there are certain Key Code sequences that do mean something.
PO: – if the form is set up for this, whatever follows the PO: on the line will appear on the purchase order. This could be used for things that must be disclosed to the buyer.
WEB: – will be used when generating a web upload, for the sales pitch part of the upload
BT:, BM1:, BM2: – used for boats and trailers.
!!! – will pop up the comment box automatically when you go to that vehicle's self finance maintenance screen

43)   *Washington B&O Tax Factoids*

B&O Tax is a tax that a Washington dealer has to pay when he sells a vehicle. The dealer may NOT bill the customer for this – the dealer has to eat it. B&O comes in three forms: Retail, Wholesale, and Service. Service B&O is for those parts of a sale that do not have sales tax associated with them.

B&O *is* paid on all retail sales to an in state customer, and on all Wholesale sales to an in state customer, *except* when it is sold at Auction. In that case, there is no B&O tax paid, and I use the Wholesale checked and B&O Unchecked for the customer to know that this is an Auction sale. B&O *is* paid even if the customer is a Native American and the vehicle is delivered to the reservation.

B&O *is* paid on sales to out of state customers if they pick up the vehicle in state. It *is NOT* paid if the vehicle is delivered to an out of state location. There are different State of Washington forms that need to be filled out, depending on if the vehicle was delivered in state and out of state. All these forms are in my scanned form database. If you do deliver a vehicle out of state, then uncheck the B&O box on the customer record. If you have a customer for which you do both, create two customer records.

B&O is also paid on warranties, gaps, and Doc fees. In this latter, you pay the Service B&O, not the Retail B&O.

44) What do I do when the sales tax changes?
There are TWO places that you have to modify when your area's sales tax changes. The first is the most obvious: admin program -> defaults has the first three entries devoted to sales tax.
Item 7, Reg Sales Tax, is the sales tax for bubblegum and everything but cars in your area.
Item 1 + 6 together must add up to the sales tax for vehicles in your area.
Item 6, the MtrV Sales Tax is, at least in Washington, an add-on to the local sales tax specifically for vehicles. Item 7 is supposed to be the bubblegum sales tax, but some counties (like Spokane) have given car dealers a break. So as of this writing, Spokane's sales tax is 8.7%, the state addon is 0.3%, but the vehicle sales tax in Spokane is onlyh 8.6%, giving the vehicle total sales tax 8.9% and not 9.0% as you would think. Why? Politics, I guess.

45)