

AutoFluent

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Total Auto Business Solutions, Inc.

Table of Contents

- Main Menu..... 4**
 - Highlights in Latest Version..... 5
 - Connecting to Support 11
 - Update Your Software..... 12
 - Backup Up Your Data..... 13
 - Multistore-Changing Location..... 14
 - Scheduler..... 15
 - Google Calendar Sync..... 16
 - Timeclock..... 18
 - Resources..... 21

- Sales Entry..... 22**
 - Searches..... 26
 - Inventory Search..... 28
 - Creating Workorders 32
 - Recommended Services 36
 - One-Click Services 38
 - Search for Shipping Address 39
 - Invoicing 40
 - Taking a Deposit..... 42
 - Negating & Copying Invoices 43
 - Workorder Status 45
 - Paid-Outs and Paid-Ins 47

- Sales Report / Daily Report..... 49**
 - Auditing..... 51
 - Mechanic Tracking 53

- Inventory Entry 55**
 - Entering Inventory 56
 - Excel Importer: Updating Inventory Costs & Vendor Catalog 61
 - Creating Invoice & Line Discounts..... 63
 - Creating a Package..... 65
 - Purchase Orders 69
 - Price Changes 71
 - Inventory Adjustments..... 75
 - Inventory Transfers 77
 - Physical Inventory 79

Inventory Details Tab	80
Inventory Email Tab	83
Inventory History Tab	84
Inventory Postcards Tab	85
Inventory Sales Tab	88
Inventory Vendors Tab	90
Inventory Web Tab	91
BinsTab	92
Tracking Bins With Quantities	93
Inventory Reports	98
Customer Entry	101
Creating, Deleting and Recovering Customers	102
Address Tab	104
Sales Tab.....	106
Terms Tab	109
Contacts Tab	111
Shipping Address Tab	112
Vehicles Tab	113
Vehicles.....	114
Notes Tab	115
Workorder Message Tab	116
History Tab	117
Customer Payments.....	118
Customer Adjustments	122
Refund Customer Deposit	124
Email	125
Create a Mailing	126
Pending Mail Tab.....	127
Mail Templates	129
Customer Reports	130
Vendor Entry.....	136
Vendor Bills.....	137
Batches of Vendor Bills.....	139
Vendor Purchase Orders.....	141
Vendor Payments.....	142
Claims and Cores	144
Checkbook.....	145

New Check	147
New Daily Deposit	149
New Deposit	151
New Fee	153
New Interest	155
New Payroll Check	157
Reconciling Your Bank Statement.....	159
Vendor Reports	162
Setup Entry	164
Setup System Settings	165
Address	166
Company Logo	167
Credit Cards / Bank	168
Daily Report.....	170
Defaults – Miscellaneous	171
Defaults – Workorders	172
Disclaimer.....	173
Email / Postcards.....	174
Interfaces.....	176
Parts and Labor Interface Setup	177
UPS WorldShip Interface Setup.....	179
Inventory / Purchase Orders	181
Inventory Transfers Setup	182
Invoice Copies	184
Sales Settings.....	186
Statements / Finance Charges.....	188
Vehicle Inspections.....	190
W/O Graphic.....	191
Invoice Watermark.....	192
Setup Expenses	193
General Ledger Setup.....	194
Employee Setup.....	195
Sales Reps / User Logins	196
Timeclock Employees	198
Timeclock Setup	200
Scheduler Setup	202
Chores.....	204
Setup Sales Categories.....	205

Setup Sales Tax Rates..... 207

Setup Item Groups 208

 Item Group Accounts 209

 Item Group Subtotals 211

Setup Terms 212

Setup Price Levels 214

Setup Bank Accounts 215

Setup Item Types 216

Setup Referred By 217

Setup Company Credit Cards 218

Setup Manufacturers 219

Setup Shipping Methods 220

Setup Oil Viscosities 221

Utilities 222

Setup Themes..... 225

Setup Report..... 226

Main Menu_New..... 227

Main Menu

The **Main Menu** of AutoFluent is powerful yet also very simple and intuitive. From this window you have access to all of the corresponding modules and reports, access to the timeclock, scheduler, backups, updates, our online tutorial videos plus much more; if you have multiple store locations you will also be able to switch between your stores quickly and easily.

 [Click here for **Highlights** in the **Latest Version**](#)

 [Click here for Online **Training Videos**](#)

From the Main menu you can access the following:

AutoFluent Modules

- [Sales Entry](#)
- [Sales Reports](#)
- [Inventory Entry](#)
- [Inventory Reports](#)
- [Vendor Entry](#)
- [Vendor Reports](#)
- [Setup Entry](#)
- [Setup reports](#)
- [Timeclock](#)
- [Scheduler](#)

Additional Options

- [Training Videos and Version Notes](#)
- [Store Locations](#)
- [Updating Your Software](#)
- [Backing Up Your Data](#)

Highlights in Latest Version

Brief Summary of New Major Features in Version 8.3

- New Main Menu, Report Menu and Setup Menu
- Greatly enhanced and simplified employee rights
- Customize the email that gets sent when you email Invoices and Workorders.
- You can now track quantities in your bins.
- The Michelin Electronic Sellout Data Upload is now available as an optional add-on. Contact AutoFluent Support for information.
- The Comprehensive Group Report will let you save multiple custom reports.
- The Daily Report now includes a new Sales Rep Recommendation report to help you track how often your reps are making Recommended Services.

Point of Sale

- The Pick-up time for your vehicle can now be seen in the Workorder list in Sales Entry. While viewing your Workorders, click the Settings button to select which columns to view. There are two new columns that can be selected: Pick-up Time and Pick-up Date.
- You can customize two more headings on the Invoice & Workorder: the FET heading and the Make & Model heading. In the Invoice Copies tab of System Settings, you can enter new names for these headings.
- In Sales Entry, when viewing Workorders, you can now see and search by the fleet number of the vehicle. To enable this:
 - Click Sales from Main Menu.
 - Click the Settings button in the center.
 - Check the box for Fleet # at the bottom.
- After printing or previewing an Invoice or Workorder for a customer with an email address, you can click the Email button at the top. A window will pop up where you can do the following:
 - Modify the email before sending it.
 - Change the email address.
 - Add another email address.
 - To add multiple addresses on the same line, separate them with a ‘;’.
 - Click the Factory Default Message button to return to the default email message.
 - Click Use Default Message to use the last saved default message.
 - If you are logged in with System Rights, you will be able to click the Save Message as Default button.

- If you have multiple stores, each customer is assigned a store. In the Sales Entry window, you can click the yellow box in the top right corner to select a store, and then you will only see customers pertaining to that store. You can also choose to see customers from all stores. While choosing a store, there is a checkbox which allows you to view all the customers who have ever purchased at the selected store, no matter what store they have been assigned to.
- In Sales Entry, clicking the Show Invoices & Quotes button will let you view quotes from all your locations, though Workorders are only accessible from the store at which they are created. This is in the Defaults – W/O tab of System Settings.
- There is a new setting to hide the time printed on Workorders and Invoices.
- If you seldom use license plates in your business, there is a setting to make it so you can safely ignore them. The setting is in the lower left section of the Defaults – W/O tab of System Settings: Fill in license plate when saving if blank. With this set, whenever you save a Workorder with a vehicle model and a blank license plate, it will be as if the No Plates button from the vehicle window were clicked.
- When a Workorder is closed improperly (due to a power failure, etc.), the Workorder will now only remain locked for approximately 90 seconds.
When using the Authorize button in a Workorder, you have to option of authorizing a free job with no price.

Employee Rights

- The employee rights section has been completely redone, giving you much more granular control over what each employee has access to. When you click Setup Entry, and then the Employee button, the window looks very different. The top half is still your list of employees, but the bottom half is a tree view of your various employee rights, broken into categories.
 - New permissions include:
 - Inventory Reports
 - Customer Reports
 - Vendor Reports
 - Allow saving or invoicing Workorders with negative quantities
 - Allow invoicing even when a stocked item does not have enough
 - Allow clicking the Update button to get the latest full release
 - Allow clicking the Update button to get the latest Alpha or Beta
 - New permissions based on previous system settings:
 - Sell to Past Due Customers
 - Charge on account to past due customers
 - Export items from Vendor Catalog
 - Add lines after invoicing
 - Edit prices in Purchase Orders

- Can Disable Shop Supplies
- Edit Customer in Workorder
- Change Customer in Workorder
- Finalize invoices with negative quantities
- Additionally, if you have multiple locations, each of these rights can be changed at each location.
- There are several new buttons on this window:
 - Copy Permissions – copies the checkbox settings below so they can be pasted to either another employee, or to all the other stores for this employee. Note that the first three checkboxes (Login, Mechanic and Sales Rep) are not copied or pasted.
 - Paste Permission – pastes the permissions copied with the Copy Permissions button to the selected employee and store. Note that you do not need to click the Save Changes button; the changes are saved immediately.
 - Paste to All Stores – pastes the permissions copied with the Copy Permissions button to all stores for the selected employee, and saves the changes.
 - Sales Rep Defaults – Checks all the boxes typical for a Sales Rep, and saves the changes.
 - Mechanic Defaults – Checks all the boxes typical for a Mechanic, and saves the changes.
 - Sales Mgr Defaults – Checks all the boxes typical for a Sales Manager, and saves the changes.
 - Back Office Defaults – Checks all the boxes typical for a Bookkeeper, and saves the changes.
 - Check All – Checks all the boxes (except for Mechanic and Sales Rep.) and saves the changes.
 - Uncheck All – UnChecks all the boxes and saves the changes.
- You can now restrict purchases to your past due customers, even if they are not beyond their credit limit. For example, in the Sales Settings tab of System Settings, if you enter 80 days, no customer will be able to charge on account who has a transaction 80 or more days past due, without the approval of another employee with this permission. This permission is one of the new employee checkboxes.
 - In the employee window, you can specify whether each employee has the right to sell to past due customers (even if it's a cash invoice), or sell to them on account.
- If an employee is set to not have rights to Sales Entry, they will still be able to click the Sales Entry button, but with very limited rights.
 - They will be able to see the list of Workorders, but they will not be able to open or preview them.
 - They will see the list of customers and balances, but they will not be able to see their phone numbers or addresses.
- In Sales Entry, there are three new possible buttons, depending on the rights of the employee:

- Refund Deposit, so an employee can get the right to do this without needing to have the rights to Customer Entry.
- P/O, so an employee can create purchase orders if they have the rights to do this, whether or not they have rights to Inventory Entry.
- Bin, if the Bin Tracking module has been activated.
- If an employee is set to not see costs, but is also set to print the Daily Report, the following will happen when printing Daily Reports:
 - The opening Daily Deposit screen will not display the Profit Total.
 - The sections of the report which show profit will be disabled. This includes the invoice list at the beginning, though the bank summary will print so they can reconcile their deposit. Hidden sections include:
 - Sales Transactions
 - Item Group Summary and Subtotals
 - Sales Rep and Mechanic summaries

Customers / Sales Reports

- The Comprehensive Group Report has been enhanced. You can create and save several custom reports, each with its own set of Item Groups and/or Subtotal Categories. For example, you could create one report comparing sales of various brands of tires, and another report comparing sales of various types of service.
- The Comprehensive Sales Report now automatically adjusts your daily goals if your sales reps are behind for the month.
- The Comprehensive Sales Report and Comprehensive Group Report can now be exported to Excel.
- You can now set it so that new customers are not allowed to pay by check by default. This is set in the Defaults – Misc. window of System Settings.
- There is a new section in the Daily Report called Sales Rep Recommendations. This will compare the sales for the day with the open Recommended Services created by each rep. The month-to-date and year-to-date figures on this report are not as useful, since it reports on open (uncompleted) services.
- If you would like to completely disable the Auto Apply button when receiving payments on account from your charge customers, you can check the box in the Defaults – Misc. window of System Settings. This is useful if most of your larger customers ask you to apply payments to specific invoices, so there is not a temptation to just apply the payments to the oldest transactions.
- When printing statements, you now have the option to only print for those who have no email address, so that these customers can receive their statements by email instead.

Inventory

- You can now track how many of each item you have in each of your bins. To do this, it will require much discipline from your sales people, your warehouse people, and your back office people. To

make it work properly, you will need to specify the correct bin whenever items are sold, received, adjusted or transferred. If you would like to implement this, check the box in the Inventory Tab of System Settings, and ask us for the 5-page instructional document.

- When viewing items in the Vendor Catalog, there is a button to convert the selected items to stocked items. Access to this button has now been limited to those with access to Purchase Orders.
- If you have access to Purchase Orders but not Inventory Entry, you will be able to enter the Purchase Order system by clicking a new P/O button in Sales Entry.
- When creating a Purchase order, you can have the cost of the item be dependent on the Vendor you are purchasing from. To set this up:
 - In Inventory Entry, select an item and go to the Vendors tab.
 - Click the New button, click on the vendor name, and select the vendor.
 - Enter the Catalog Cost for that vendor.
 - If desired, you can also enter the Vendor Part #. This would print on Purchase Orders for that vendor.
- You now have the option of having your inventory history reflect the sales price before or after the discount. This is set in the left section of the Inventory / PO's tab of System Settings.
- You can now copy all your Catalog Costs and/or Spiffs to selected stores. This is done in the Inventory tab of the Utilities window (from Setup Entry).
- You can now specify a General Ledger Account when making an Inventory Adjustment.

Inventory Reports

- The Inventory Transfer report now lets you select a particular store to report on, and the report will show all transfers to or from that store in the selected time period.
- The Inventory Sales Transaction Report can now be printed for a specific sales rep.
- The Inventory Reorder Report now includes an On Order column.
- The Bin Count Sheet lets you select a range of Bins.
- The Bin Report offers 10 options for sorting, and lists all the bins for each item.
- There is a new report, Bin Labels, which will let you print barcode labels for your bin locations. This is mainly for use when using the bin tracking module.
- The Inventory Transfer report now gives subtotals for each store.
- The Inventory Transaction report can now be printed for a selected store, or all stores.

Vendors

- The Vendor Aging Transaction Report now has the option to print only the totals.
- The Purchase Orders by PO Report now shows the total received, backordered or not billed, depending on the selected settings of the report.

Mechanics

- In the Mechanic Report window (accessible from the Mechanic Tracking window), there is a new report available, the Mechanic Productivity Report. This will print the punches and hours for all jobs done in the date range, even if the job has not yet been completed. This only applies if you have your mechanics clock in and out on their jobs.
- The Mechanic Tracking report now prints the total of the mechanic's hours.
- In the Mechanic Tracking window, you can now add new lines to the list of jobs done, as well as delete lines in the list. These can either be associated with existing invoices or with chores.

Miscellaneous

- Now when you customers place an order on your website, an email can be sent to them and/or you about the order.
- The Sage 50 interface has a new option which will no longer require that you continue to purchase the latest version of Sage 50 to use our interface.
- The Scheduler will now allow 24-hour schedules to be displayed.
- There is a new Tablet Mode which makes it easier to use the Search, Done and New buttons when you are using a tablet. This setting is in the Defaults – Misc. tab of System Settings, and only applies to the computer or tablet you are currently using.
- The Google Calendar Sync for Appointments and Workorders has been enhanced. There are now options to have separate calendars, separated by Mechanic or Bay. The Mechanic Notes and Appointment notes now appear in the Google Calendar events.
- We can now interface with the Michelin Electronic Sellout Data program. This is a new program Michelin has implemented, which offers bonuses for shops using the program. The quantity of Michelin tires sold is sent electronically to Michelin automatically when the day is posted. This is an optional module. Call for details.

Connecting to Support

With your support, our acclaimed technical support team will always be available to help you with any and all AutoFluent related questions. There are a few ways you can connect to a technician.

Chat

From the Main Menu press the **Click Here for Support** button found in the lower left hand corner of the window. Press the **On-line Chat** button. This option is helpful if you have a quick question that may not require the technician to see any particular problem. Typically general inquires or suggestions.

Remote Support

From the Main Menu press the **Click Here for Support** button found in the lower left hand corner of the window and press the **Download Remote Support** button. You may see a window appear asking if you want to run or save the file select **“run”**. In just a few moments a disclaimer will appear. Press **Accept**, and enter your information in all three fields: *Name*, *Company*, and *What are you Contacting us about today?* It is important that you fill all of these fields with your complete information so that your technician can help you most effectively. Press the **Submit** button. You will be added to the queue where a technician will be with you shortly.

Email

If you have inquires that are not urgent, feel free to email our support at support@tabsautobiz.com. This method is most helpful for non-emergency inquires and suggestions.

Phone

You may also reach us by phone at **(916) 576-2021**.

Update Your Software

At AutoFluent we are always coming up with better ways for you to run your business effectively. We deliver these new features to you via our updates, these updates are part of your support costs so you never have to worry about extra fees for newer versions of your software.

How do I know if there is a new update available?

You will know that an update is available for your system when a yellow banner appears on your AutoFluent stations that says “Internet Update Available.”

How do I update?

Updating can be done in a few easy steps. If you see that the yellow internet update banner on your **Main Menu**, follow these steps in order.

Updating Stations (Repeat these steps for all stations)

1. Before updating the first computer, make sure that everyone is logged out of AutoFluent for just a few minutes. Data loss or corruption can occur if users are still in the system while the update is taking place. This only applies when the server is being updated.
2. You will update your AutoFluent Server computer first. If you are not sure which computer is the server, on the **Main Menu** you will see the word **SERVER** in blue at the bottom of the screen.
3. From the **Main Menu**, select the **Update AutoFluent** button located in the lower right hand corner.
4. Select the **Download Update** button.
5. Another window will appear detailing the changes that have been made. Press the **Update** button to begin.
6. The system will now download the update files. If AutoFluent is still opened in the background, you will be asked to close it. This process can take a few minutes – do **not** turn off the computer!
7. A window will appear that says Update Successful. Click **Finish** to exit.



If you are a customer who is using our Cloud Hosting you may skip to step 3

Backup Up Your Data

Navigation: From the Main Menu, log in and press the **Backup** button.

Keeping your data safe is vital. With your AutoFluent support, you are entitled to backup your data to the web where it will be easy for our support technicians to restore it in the instance of a catastrophe. You can also backup your data onto a local or external device. It is recommended that you back up your data at the end of the day **every day**. The more often you backup the less information you will have to manually enter again if data is lost.

Backing up

- Log into AutoFluent on the **Main Menu** you will see a *Last Backed Up* date.
- Press the **Backup Data** button
- A window will appear stating the date and time of the last backup.
- The Backup locations window will appear. In this window you can add locations on your computer, if you are using a flash drive plug it in now.
- To back up using the same settings as the previous backup, simply click the **Back Up** button.
- Press the **Add Destination** button to browse your folders and add a destination you would like to back up to. If desired, you can create a new folder. After selecting a folder, press **OK**.
- To backup data to the web check the Backup to Web box. These settings only need to be set once and will be saved for future backups.
- Press the **Back Up** button. The process can take a couple of minutes, so do not close the window.
- You may close the window when Backup Complete is displayed.



Note: If you are a customer on our™ Cloud Hosted Service your online backups are done for you automatically every night!

Multistore-Changing Location

If you have multiple locations, switching between them from the main menu is seamless.

You will need to set up which stores each employee can access before they are able to log in to the respective locations. For more information on setting up employee permissions, [CLICK HERE](#).

- Log into AutoFluent with your assigned user name and password created in the [Employees Setup](#). Initially you may only have a Supervisor login available, this login has no password. It is recommended that a password be assigned as soon as possible as this login has full system access.
- On the upper left hand side of the **Main Menu** you will see a drop down box with the name of the location you are currently logged into.
- Simply drop down the menu and select another store to switch over to that location.

 **NOTE:** You don't have to switch between stores to see a particular store's information like invoices and customers; you can see it all from your current location. For more information on searching information, [CLICK HERE](#).

Scheduler

Navigation: There are a few ways to enter the **Scheduler**:

- From the **Main Menu** click the calendar icon at the top of the window.
- From **Sales Entry** click the **Scheduler** button.
- From within the **Workorder** click the **Schedule** button.

With the scheduler, you can schedule appointments, view the schedule by labor department or mechanic, and even create workorders from scheduled appointments. Before beginning to utilize the scheduler, you will want to refer to the [Scheduler Setup](#) section.

Changing View:

Switch between *day*, *week* and *month* view by selecting the radio boxes. View appointments by department or by Mechanic by using the *Group By* drop down box. Having *None* selected will show all appointments.

Scheduling a New Appointment:

Double-click on the day and time that you would like, or right-click a time and select **New Appointment**. Enter the details in the new appointment window. Press **Ok** to add the appointment to the scheduler.

Create [Workorder](#) from Appointment:

Once an appointment has been added to the scheduler you can create a workorder by right clicking on the appointment and selecting the Workorder option. The workorder will open for this customer and vehicle, and you can edit lines.

Deleting an Appointment:

Right click the appointment and press the **Drop** button.

Print Schedule:

Right click a day and press the **Print Schedule** button.

Google Calendar Sync

The AutoFluent Scheduler can be synced with one or more of your Google Calendars.

Setting up Google Calendar Sync

- Navigate through [Setup Entry](#) to [Employees](#).
- Select the [Scheduler Setup](#) tab.
- Check the **Sync Appointments with Google Calendar** box.
- Press the **Save Changes** button.

Adjusting Google Calendar Sync Settings

- From the [Main Menu](#) launch the AutoFluent [scheduler](#) by pressing the button displaying the date.
- Right-click anywhere on the Scheduler.
- Select *Google Calendar Sync* from the list. (This may take a moment to launch.)
- Enter your Gmail login name and password when prompted.
- Press **Accept** to begin the verification process.
- A list of your available Gmail calendars will appear. Here you can set the rules for each calendar you would like to sync appointments to.
- Once all settings are configured to your preferences, press the **OK** button to finish. All current appointments made will now be synced to your Google calendar.

Details

- **All Appointments:** Checking this box will sync all appointments on the AutoFluent Scheduler to this Google Calendar.
- **Mech ID:** Select *Mechanic ID* from the list so that only appointments on the AutoFluent Scheduler assigned to the mechanic will appear on the selected Google Calendar.
- **Bay:** Select *Bay #* from the list so that only appointments assigned to the selected Bay appear on the selected Google Calendar.
- **Without Mechanic:** Only appointments with no mechanic attached will be synced to the selected calendar.
- **Without Bay:** Only appointments with no bay attached will be synced to the selected calendar.
- **Resync All Appts:** If you'd like appointments in AutoFluent that were made before the Google Calendar setup to also be synced to your Google Calendar, press the **Resync All Appts** button. This may take a few minutes.
- **Forget my Google Account:** This is used to delete the Google Account setup and all of its settings.



Any changes made to appointments on the Google Calendar will not update the AutoFluent Scheduler.

Timeclock

Navigation: from the Main Menu, select the blue box that is displaying the current time.

With the Timeclock you can keep track of, edit and run reports on your employees' punches. Pressing the **Clock** button will bring up a list of your employees at this location as well as their current status (either punched in or punched out). Before fully using the **Timeclock** you will want to set it up in the [Employee Setup](#).

Punch In/Out

- Select your name from the list.
- Enter the Timeclock Password (This can be different from your login password.)
- Press the **Punch In/Out** button.
- If anyone has sent any messages to you then you will be sent to the *Timeclock Message* window before going to the Punch In/Out window. Select the message to view in the top half of the window and read the message in the bottom half of the window.

Entering Missed Punches

If a punch was missed on the current day it can be entered in the white box in the top section before pressing the **Punch In/Out** button. If entering a missed punch on a previous day select that day and enter the last punch in the empty white box.

Send Message

To send a message to one or more employees:

- Select your name from the list.
- Enter your Timeclock password (which can be different from you login password).
- Press the **Send Message** button.

In the Timeclock Messaging window:

- Click the checkbox in the Select column of the person or people to receive the message.
- If the message is not to be delivered right away, change the **Deliver On** date.
- Optionally, you can select a department to send the message to, using the drop-down list. This will check or uncheck the appropriate boxes in the list of names.

- To uncheck all the boxes, press the **Clear All** button at the top of the window.
- Enter the message in the white message box, or click **Use Special Editor** to create a message with special fonts and colors. (NOTE: If you choose an unusual font, that font may not be installed on the other workstations.)
- Press the **Send Message** button to send the message to the selected people.

Logging Time Off

The main reasons for entering Time Off information is so that the Scheduler will show who is off and why, so the appointments can be scheduled more appropriately. To edit or view the list of days off:

- Select your name from the list
- Enter your Timeclock password (which can be different from you login password)
- Press the **Time Off** button.

If you are a [Timeclock Manager](#), you will be able to edit or view everyone's **Time Off** entries by selecting the employees in the list. Otherwise you will only be able to edit or view your own.

Note that you are only viewing Time Off entries beginning with today. To view older entries, change the date in the middle of the window.

To delete the selected entry, press the **Delete** button. To add a new entry:

- Press the **New** button.
- Select the date range the employee will be off.
- Select the reason the employee will be off from the drop-down list.
- Press the **Save** button. An entry will be created for each day in the selected date range.

Edit Punches

This button is only available if you have logged into AutoFluent as a Timeclock Manager. Before pressing the button, enter the password you used when you logged in to AutoFluent (**not** your Timeclock password.)

In the **Timeclock Punches** window, you can review the employees' punches, approve overrides (manually entered missed punches,) and change punches. You can even create a day full of punches. Each activity is tracked, and the **Timeclock Report** will show which punches have been overridden, approved and changed.

To only view employees in one Timeclock Department, select the department in the drop-down list. To view punches in a different date range, change the range of dates.

Time Clock Reports

There are several reports you can use to track your employee punches.

Resources

From the **Main Menu** click on the **AutoFluent Logo**. A window will appear with some information about your software including links to the AutoFluent website. There are also additional resources like:

- [Version Notes](#)
- [On-Line Training Videos](#)
- [Animated Screenshots](#)

Sales Entry

Navigation: From the Main Menu, select the **Sales** button.

Clicking the **Sales** button will bring up the Sales Entry window. If you are a sales rep, you will be spending most of your time in this window because it is where you will be creating, editing, and invoicing your workorders & quotes. The first task when a customer calls or comes in, is to see if they exist in the system. When you enter the **Sales Entry** screen, you will find that all of your customers are held in the top pane of the window, while workorders, quotes, and invoices are held on the bottom pane.

 **NOTE:** If you have multiple stores, you will by default see the customers associated with the store you are logged into. However, by clicking in the yellow search box above the Store column, you can switch between stores, or you can choose to view All Stores. If you would like to see customers from all stores by default, you can check the box in the [Defaults – Misc.](#) tab of **System Settings**.

Sales Entry-Details

New Work Order

- To create a workorder for a new customer, simply hover over the yellow **New** button and select **Customer & Workorder**. To create a work order for an existing customer, search for the customer using the yellow search boxes, hover over **New**, then select the **Workorder for Selected Customer**. Alternatively, there are three other ways to create a workorder:
 - Triple-click a customer.
 - Select a customer and click the **New** button.
 - Make sure the **All Workorders & Quotes** customer is selected (the first one in the list), and click the **New** button to create a workorder for a new customer.

New Quotes

- A quote is different from a workorder because it does not affect stock until it is turned into a workorder. Another nice feature about a quote is that if you quote two or more different tire packages, the quote will show one line per tire, each line with its package price, and totals will not print at the bottom. You can also periodically [purge old quotes](#). To create a new quote, hover over the **Start** button and select either **New Customer & Quote** or **Quote for Selected Customer**.

Workorder for the Cash Customer

- If you set up a generic cash Customer for convenience, pressing this button will start a workorder for that customer. This is useful for customers who are just paying cash for something small, and are not expected back. To create a workorder for this customer, simply hover over the **New** button and select **Workorder for the Cash Customer**. This can be set up in the [Sales Settings](#) tab of **System Settings**.

Show All Workorders

- Normally, when you open the Sales Entry window, the bottom half of the window displays all of your open workorders. To see quotes as well, click the **Show Invoices and Quotes** checkbox on the left. With this box checked, if you select a Customer the bottom half will contain all the transactions for that Customer. Pressing **Show All Workorders** will return to showing the open Quotes and Workorders.

Show All (top of screen)

- Click the **Show All** button to put all Customers in the search list at the same time (it may take a minute to load them all if you have a very large number of Customer.)

Clear Button Functions

- After you have entered characters in any of the yellow search boxes, press the **Clear button** to clear your entries and start a new search. There are two Clear buttons in this window, one for each list-box.

Select Button Functions

- After selecting a Workorder or Quote in the lower list-box, press the **Select** button to edit it. Double-clicking a *Workorder* or *Quote* will also perform this function. If you press this button while selecting an Invoice that has not been posted yet (i.e the Daily Report containing that Invoice may or may not have been printed yet, but has not been posted), you will be allowed to change how the Invoice was paid, as well as the terms, the Customer type and the sales rep. If the day has been posted, you will only be able to change things that do not pertain to dollar amounts, such as the vehicle, the mileage, the Customer Order #, and the date.

Vehicle Drop-down List

- When a Customer is selected in the upper list-box, click this drop-down list in the center section of the screen to view the vehicles for the Customer. You can select a vehicle to only view the transactions pertaining to that vehicle.

Preview Workorders / Invoices

- Press the **Preview** button to preview the selected transaction. You can also choose to print by pressing the printer icon at the top of the screen.

Search Button Menu

- **Phone** – This will let you enter a 7 or 10 digit phone number. If you enter a 7 digit number, it will search for the number using the 3 area codes specified in the [Address Tab](#) of **System Settings**. If the phone number is not found, the internet will be searched using a phone look-up service.
- **Swipe Card** – This will let you swipe a specially made magnetic card with your USB card swiper to bring up the customer's information.
- **Workorder** – This will let you enter a workorder number to search for as well as the store that you would like to search at. Since finalizing a workorder generates a consecutive invoice Number which is different from the workorder number, this will let you find invoices by their original workorder number. If it is found, the workorder or invoice will appear in the lower list-box, and its Customer will appear in the upper list-box. You can also search for the last workorder created by pressing the **Last Transaction** button.
- **Invoice** – This will let you enter an invoice number to search for as well as its store code. If it is found, the invoice will appear in the lower list-box, and its Customer will appear in the upper list-box. You also can search for the last invoice that was completed by pressing the Last Transaction button.
- **License Plate** – This will let you search for a Customer by license plate. After selecting a vehicle with the **Select** button, the Customer will appear in the upper list-box. You can also search by Fleet number, VIN number, year, make, model etc.
- **Vehicle Model** – This will take you to the Model Guide, to check for engine, tire and wheel information for a specific model. (Note that tire and wheel information is only available if you have purchased the Tire Module.) Selecting a vehicle in the Model Guide window also assigns an Aces number, which enables automatic lookup when searching for parts, labor, or information to transport directly into your workorders from Aces members that integrate with the AutoFluent System, such as labor guides and parts warehouses.
- **Inventory** – This will take you to your inventory list, to check pricing and availability at your single or multiple locations. See the [Inventory Search](#) window section for more information.

More:

[Searches](#)

[Creating Workorders](#)

[Invoicing](#)

[Mechanic Tracking](#)

[Workorder Status](#)

[Recommended Services](#)

[One Click Services](#)

Searches

Navigation: From the Main Menu, Select **Sales Entry**

If you are a sales rep, you will be spending most of your time in the Sales Entry window because this is where you will be creating, editing and invoicing your workorders & quotes. The first task when a customer calls or comes in is to see whether they are in the system.

When you enter the sales entry screen you will find that all of your customers are held in the top most pane of the window. While workorders are in the bottom pane.

 **Note:** Quotes and invoices can also be viewed in the bottom pane if you check the **Show Invoices & Quotes** radio box and select a customer from the list.

Searching by Store (Multistore Only)

If you have multiple shop locations, switching between them to look up customers, workorders, invoices and quotes is simple. On the far right of the yellow search bars you will see a column that says “**Store**”. Clicking this will bring up the **Select Store** window. You can select the a specific store that you would like to see customers or transactions for, or you can select the option to view All Stores.

Searching for a Customer

Use any of the following methods to find Customers (Be sure that you are viewing the correct store.):

- Enter the first letters of the first name, last name and/or company name in the yellow search boxes above the column headings near the top of the window. To do a different search, press the Clear button.
- By typing ‘%’ in the yellow search boxes, followed by search criteria, you will find anything that includes the criteria.
 - For example, typing “%tire” into the company name search box will display all of the Customers with “tire” anywhere in their company name.
- Entering the symbols ‘>, <, >=, or <=’ in the yellow boxes above a column containing values only, such as date, price, quantity, or balance columns, will show you everything you have that is greater than, less than, greater than or equal to, or less than that amount.
 - For example, you could enter >1000 into the balance search box to display all Customers that have greater than a \$1000.00 balance due.

- Click the **Phone #** button at the bottom of the screen and enter a 7 or 10 digit phone number.
 - If you enter a 7 digit number, the system will try the 3 area codes set up in the **Address Tab** of **System Settings**.
 - If you enter a 10 digit number which is not found in your database, the system will look online for the name and address.
- Click the **License Plates** button and enter the license plate.
 - You can also search for the vehicle by fleet number, VIN or model.
- If they have an invoice or workorder number, click either the Invoice or Workorder button and enter the number.

Searching for a Transaction

Use the following methods to find:

- You can put a Q in the yellow box above the Type column to search for Quotes only, and then type the first part of the Customer's name in the yellow box above the Paid By column. Note that the **Show Invoices & Quotes** checkbox needs to be checked to see the quotes with the workorders.
- You may also search for dates before or after a specific time using the <, >, <= and >= characters.
 - For example, you could enter >=5/4/05 into the yellow date search box and find all of the transactions on or after 5/4/05.
 - You can also put a >1000 in the yellow box in an amount column to search for anything over \$1000.

Searching for Inventory

[Click Here for the Inventory Search window.](#)

Inventory Search

Navigation: The inventory search appears in several places in AutoFluent, making it easy to access.

- **From Sales Entry:** Press the **Search** button found at the bottom of the Sales Entry window.
- **From a Workorder or Quote:** Press the small magnifying glass icon on a workorder line.

Once the **Inventory Search** window is open, you will be able to view all non-obsolete items in your inventory. There is also an option to view obsolete items with the **Display Settings** button. If you are a Multistore user you may also use the **Display Settings** button to enable viewing the available quantity of items at your other locations.

You can click in any of the yellow cells over the headings (or you can use the *Tab* key and the *Shift-Tab* key to move between them) and enter additional criteria.

Options

Select

This button selects the item and closes the window. The selected item is the one that the triangle on the left edge is pointing to. Pressing the *Enter* key on your keyboard automatically pushes this button.

Cancel

Closes the window without selecting anything. Pressing the *Escape* key on your keyboard pushes this button.

Find Group

You can show a list of items from a specific Item Group with this button.

Tire Calculator (Tire Module option required)

Press this button to gain access to the **Tire Calculator**. This is a very useful tool for graphically comparing original tire sizes and new tires sizes. This button will be available if you have purchased the **Tire Module**.

Tire Guide (Tire Module option required)

Press this button to access the Tire Guide where you will be able to select the year, make and model of a particular vehicle and find all of the information for that vehicle's particular tire size, psi etc. You will also be able to select these tires from your inventory or from the **Vendor Catalog** (see below).

Alternatives

If alternative part numbers have been set in the [Vendors tab of Inventory Entry](#) you can search by the alternative part numbers here.

Display Settings

Press this button to gain access to additional columns or items that you would like to view in the inventory search. You can also check the radio boxes to show cost on items or to even show obsolete items. Press **Done** to save the change or press the **Return to Default Settings** to return to factory settings.

In Stock

Check this box, and the only items shown will be those that are in stock.

Long View

This allows you to see more items at once by hiding the bottom section. Uncheck the box to return to the normal view.

Show All

Press this button to see all of the items in your inventory.

Clear

Press this useful button when you have entered some search criteria and want to start over and enter different criteria.

Vendor Part

Displays a list of items with a specified Vendor Part #.

Vendor Catalog

If you are interfacing with one or more tire suppliers, or if you have imported catalogs from spreadsheets, you can view them with this button, and pull the selected item into your workorder.

Your Web Photo

If you have a website, the image associated with this item can be viewed with this button.

Scan

If you are using a barcode scanner, you may scan the UPC code to bring the item up quickly. Simply press the **Scan** button.

Tabs

Details Tab

- **Available/On Hand/On Order:**
 - *On order* refers to how many of the selected item are on purchase orders. Click the number to see which orders they are.
 - *On Hand* indicates how many of the item are physically at the shop.
 - *Available* indicates how many items you have that are free and not attached to any orders. If you have 6 on hand, and 2 available, it means there are 2 on workorders.
- **Catalog Cost / Last Cost / Average Cost:**
 - The *Last Cost* is the cost of the last purchase.
 - The *Average Cost* is the average of all the items currently in stock.
 - The *Catalog Cost* is typically the only cost you will update, and is the cost you expect to pay on your next purchase.
- **Price Level Button:** Here you will see the various price levels. There are 12 fixed price levels, and unlimited custom price levels available. You can choose which are available at your current store in the [Price Levels Setup](#) window. The price in the top grid will depend on the price level selected in the bottom section. Click the **Price Level button** of the desired price, and the price will turn yellow, indicating that it has been selected. If you opened this window from within a workorder, the price level of the selected customer will be used.

History Tab

Here you can see the purchases and sales of this item, along with whom they were purchased from and sold to.

Workorders Tab

If any of these items are already on workorders, the Available quantity will be different from the Quantity on Hand. Click this Tab to see which open workorders they are on.

Notes Tab

This is a free-form area with any special notes pertaining to this item.

Creating Workorders

Starting the Workorder

A customer comes in and would like work done to their vehicle. You will navigate to the **Sales Entry** screen from the **Main Menu**. In the upper left hand corner is a yellow **New** button. Hovering your mouse over this button gives you a few different options:

- For a brand **new customer**, you will select the first choice, “**Customer & Workorder**”.
- For an **existing customer**, you will search for a customer and select them. Then hover over the **New** button and select “**Workorder for existing customer**”.

 **NOTE:** You can speed up the process by selecting the vehicle in the middle of the window after selecting the customer, but before clicking **New**.

- If you have Multiple Stores, the customer's home store will default to whatever store you are logged into at the time of creating the first workorder for them. To change the customer's main store simply go to the [Customer Entry](#) and change it in the [Address tab](#).
- For a customer who does not want to give all of their details and only wants to pay with cash you can also select a **Workorder for the Cash Customer**. This should not be used if you are working on their vehicle.

Adding Details to the Workorder

You are now at the Invoicing window. Here you can complete and finalize the workorder in three easy steps.

Step 1: Filling in Customer Information

- If you have already selected the customer and vehicle, you can skip this step completely, and instead just verify that the information is current.
- You can enter how the customer was referred to you and also their vehicle information including license plate number and VIN. If you would not like to add a vehicle, you can check the box that says “No Vehicle”

* NOTE: If you are not servicing their vehicle, it is a good idea to click the **No Vehicle** button to reduce your liability. For example, if you sell them a tire that they want to install themselves, this checkbox will protect you.

- Using the Carfax Quick Vin “**C**” button you can save a lot of time. Simply put in the license plate number and verify the state then press the **C** button, Carfax will instantly bring in the vehicle’s VIN, year, make & Model information, as well as other information. For more information on the vehicle press the **Vehicles** button.
- Enter the current Mileage for the vehicle in the space below the vehicle on the Workorder screen.
- Enter your customer’s details, including first and last name, phone number etc.
- In the last column you can change any information however, everything but the sales rep and mechanic should be correct, using the system defaults, for the settings for the selected customer:
 - Assign the [Sales Rep & Mechanic](#),
 - Change the [Sales Category](#),
 - Change the [Price Level](#),
 - Change the [Tax Type](#),
 - Change the [Terms](#),
 - and change the [Shipping Method](#).
- If the customer has a credit available the credit will be displayed beside **Credit Available**, otherwise it will display “none”

Step 2: Adding Parts, Labor, Etc.

Now you can enter inventory items into your workorder, this can be done in several different ways:

- **Via Inventory Search:** Select the small magnifying glass on the side to enter the [Inventory Search](#) window. Use the yellow boxes to search by Size, Item, Catalog #, Type, Description, or any combination of these. Once the item you want is selected either double-click the line or click the **Select** button at the top to add it to the workorder.
 - **Multistore:** selecting the “Display Settings” button will give you the option to see what is available at different stores if you don’t have it at your current location.
- **Via Catalog Numbers:** If you have already entered your inventory and you know the parts catalog number you can enter it into the catalog column and hit the “tab” key on your keyboard. The item and all of its associated information will be added to the workorder.
- **Via One-Click Services:** Certain jobs that you may do frequently can be setup as One-Click Services. This is the fastest and most efficient way to enter items into a workorder.

* Note: If you do not keep much inventory, or are still in the process of entering your inventory, you can use AutoFluent's default Outside Part item, called **OP**. OP is a generic miscellaneous part that can be changed to your liking from within the workorder. Change the description, quantity, and price as you see fit. Pressing the blue "P" on that line can give you even more options to enter vendor purchase information, cost, markups, etc.

Step 3: Invoicing and Additional Details

Here is where you will apply the last details of the workorder. Most of these features are optional.

- **Disc Part / Disc Labor** Apply discounts to parts and labor on the fly simply enter the percentage you would like discounted and AutoFluent will do the rest. You can set certain customers up to automatically get a parts and/or labor discount in the [Sales tab of Customer Entry](#).
- **Schedule** Pick a date for pickup of the vehicle or schedule a time for the job to be done by selecting the [Schedule](#) button.
- **Select a Bay:** If applicable you can assign this order to a particular [bay](#).
- **Profit Margin:** Quickly view your profit margin broken down by parts, labor, etc. so that you can make quick adjustments to your order.
- **Toggle Columns:** To see additional columns that may be hidden from view by default. Once you hide or unhide a column, the setting will be remembered.
- To the far right is the breakdown of everything on the order, Parts, Labor, Tax, etc.

* You can force a price on the whole workorder by selecting the **Total** button. A window will appear that will make it possible to manually enter the price you would like the workorder to be then choose to adjust either parts, labor or both. You can also choose to adjust the total and have the difference show up as a discount by pressing the Adjust Discount button; the system will make these adjustments instantly.

Step 4: Saving or Finalizing the Workorder

Move the mouse over the **Done** button, and you will be offered several choices to close the workorder

- Click **Save** to save the workorder to come back to it later (or simply click the **Done** button.)
- **Convert** will turn the workorder back into a quote. Quotes are identical to workorders, except that they do not affect inventory, and they can be purged periodically. Generally, workorders should just reflect the vehicles currently being work on.

- **W/O** will save and print one or more copies of the workorder. See the [Invoice Copies tab of System Settings](#) to specify how many copies are printed, and what they look like.
- “Invoice” will create the invoice, finalizing the workorder. [Click here for details on this step.](#)
- **Void** will let you void the workorder, but only after requesting your login name, password and a reason for voiding it.
- **Deposit** will let you take money from the customer before finalizing the invoice. For example, you may need to take money to special order a part. [CLICK HERE for more information.](#)

More:

[Recommended Services](#)

[Parts & Labor](#)

[One-Click Services](#)

Recommended Services

Navigation: From an open Workorder select the **Recommended Service** button.

Here is where you can enter the information you have collected from a customer's vehicle inspection and where you can add or decline services.

Vehicle Inspection

- Press the **Recommended Service** button in the workorder.
- Press the **Vehicle Inspection** button.
- The **Vehicle Inspection** window will appear where you can check the items that need attention. Clicking a line once will produce a yellow *Service Soon* color, clicking a line twice will produce a red *Immediate Service* color, and clicking a line a third time will turn it white, excluding this line from the Inspection Sheet.
- Press the **Print Customer Copy** button and/or **Print Mechanic Copy**. You can set it [HERE](#) to automatically print the mechanic copy whenever a workorder is printed.
- When done, press the **Save** button.



NOTE: The Vehicle Inspection sheet can be customized to your liking. Simply visit the [Vehicle Inspections](#) tab in the **System Settings**.

Adding / Declining Recommended Services

You will now see that the items that had been marked yellow or red have been added to the Recommended Service window where the customer can Accept or Decline the service. Once all the lines have been either Accepted, Declined or Ignored you may press the **Add Accepted and Declined Services to Workorder** button. You can also choose to add a new service to this area with the **Add New Service** button.

Not only will the services that were accepted be added to the workorder, but if services were declined, they will also be sent to the workorder, with the following heading: *The following recommended services have been declined:*. This default message can be edited [HERE](#).

If the **Email Reminders for Declined Services** box was checked before adding the services to the workorder, an email reminder will be sent for each service declined. A window will pop up for each email, allowing you to edit it, and specify how far in the future you would like it sent.

If a service had been declined, the next time you open a new workorder for this customer, the **Recommended Service** button will be highlighted red, indicating that there is a declined service that you may want to recommend again.

One-Click Services

Navigation: From your open workorder press the **One-Click Services** button.

You may have a handful of jobs that you add to your workorders very frequently. Adding all of the items for these jobs one at a time can be time consuming. It would be a better idea to create a [package](#), and set that package up as a *One-Click Service*.

Setup a One-Click Service

- Create a package in your **Inventory Entry**. ([Click HERE to see how.](#))
- Open an existing workorder or create a new one.
- press the **1-Click Services** button. (Note that system will remember this, so you won't have to click it every time you open a workorder.)
- Press the **Configure** button on the bottom right.
- In the *Catalog* column, press the ... button. This will take you to the **Inventory Search** window where you can choose your desired package.
- In the *Caption* column, enter the name that you would like to appear for the 1-click service window, like *Basic Oil*.
- Check the **Active** box.
- In the *Icon* column, press the ... button to choose the photo that you would like to associate with this service.
- Press the **Save Settings** button when you are done.
- You will now see that the service has become available along with the picture.

Search for Shipping Address

Navigation: From the **Workorder** window, press the **Ship To...** button. Then the **Select New Address** button.

Here you may specify an alternate shipping address for the workorder by clicking an address and pressing the **Select** button. If the address is not in the list, you can use the **New** button to add a new address to attach to the selected Customer.

To create a new shipping address, press the **New** button and enter the name and address. At this point you have two choices:

- Press the **Select** button without saving if you don't think you will use the address in the future.
- Press **Save Changes for Future Use**. Then you can either press **Select** or add an additional address.

To delete the currently selected address, press the **Delete** button.

Addresses can be edited at will simply by typing over the information. Remember to save any changes you want to remember in the future.



If you add a new address, and select it without saving it, it will still print on the invoice, and will be visible later by previewing the invoice.

Invoicing

Navigation: From an open Workorder, hover over the **Done** button and press the **Invoice** button.

Now that you have successfully created your workorder, you are now ready finalize the invoice.

Selecting a Payment Method

Hover over the **Done** button in the workorder, choose the **Invoice** button. The **Payment Method** window will appear with the invoice total at the top. You will also see a list of payment options available.

- **Cash:** If the customer is paying by cash or VISA, simply press the **Pay by Cash** or **Pay by VISA** button.
- **Multiple Methods:** If the customer would like to break up payments between different payment methods you may do that as well. Lets say that the invoice is \$152, and they want to pay \$40 in cash and the rest by VISA. You would manually enter 40 in the box by the **Pay by Cash** button, and then click the **Pay by VISA** button.
- **On Account:** If you selected a charge terms in the workorder, such as *Net 30*, you will see an option click the **Pay On Account**. You can even pay for part of the invoice by cash and part on account. Charging to the account an amount greater than the available credit limit will result in a warning window. If you are not a Credit Manager, you will need to have a credit manager enter their name and password.
- **Terms:** You can even set up custom terms on the fly by selecting the **Custom Terms** button located on the upper right hand side of the Payment Method window.
- **Deposit:** If the Customer has a deposit on the books (See [Taking a Deposit](#).), that amount will appear under **Deposit Available**, and the amount will automatically appear on the **Pay by Deposit** line. If for some reason the Customer does not want to use that deposit at this time, press the **Clear** button on that line, and press one of the other 'Pay by' buttons.

Finalizing the Invoice

Once the *Still to Pay* amount has reached \$0.00 you can select the Cashier from the drop down box provided and then select the **Done** button to finalize the invoice. Copies of your invoices will appear for you to print or email. Click [HERE](#) to see how to set it to automatically print up to 4 copies of the invoice, and how to have a copy of the invoice automatically emailed to the customer.

Correcting a Payment Type

If the wrong type of payment was taken (for instance cash instead of Visa) and needs to be corrected you can do this so long as the [Daily Report](#) has not been posted for that day.

- Enter the Sales Entry and look up the invoice # or customer
- Select the desired invoice from the list and press the yellow Select button in the middle window
- The invoice window will appear where you can change the payment method as well as a few other details if you'd like.

 Note: Need to backdate an invoice? Use the drop down box next to the date (located on the bottom left hand side) to select the date that this invoice should have been finalized. Even if you change the date to last month, the invoice will still be combined with today's daily report, with last month's date on it. However, other sales reports, and your accounting system will reflect the correct back-dated date.

Taking a Deposit

If a customer would like to leave a deposit as a down payment on an existing workorder follow these steps:

- In the **Sales Entry** screen, [search](#) the desired customer and workorder, and double-click the workorder to open it.
- Hover over the **Done** button and select **Deposit**.
- Enter the [Payment Method](#) (cash, check etc.)
- Press the **Done** button to finalize and receive a receipt.
- The customer now has a deposit attached to their profile.

To Refund a Customer Deposit click [HERE](#).

There are three ways to see that there are one or more deposits for a customer:

- In the [Sales Entry](#) window, the workorder with the deposit will have a small circle in front of their name in the *Paid By* column.
- If you press the [Invoice](#) button in a workorder, you will see the deposit available for that customer in the lower right section of the payment window.
- In **Customer Entry**, you will see it in the [Sales Tab](#).

Negating & Copying Invoices

Navigation: From the Main Menu:

- Select the **Sales Entry** button.
- Select a customer from the list.
- Check the **Show Invoices & Quotes** box.
- The **Copy/Negate** button will appear.

Once a workorder has been invoiced, it is saved to the customers history and cannot be deleted, instead it can be negated, which means that another transaction is made with the opposite amounts of the original invoice, and the two transactions balance each other out.

Negate and Copy Invoice

Use this to change an existing invoice. It will:

- Create an invoice which is opposite of the original invoice, negating it.
- Copy the original invoice into a new workorder, which can be edited as desired.

Negate Invoice:

This will create a workorder which is the same as the selected invoice but with opposite quantities. Use this when a customer is returning everything on an invoice.

! Important: The negated workorder needs to be **Invoiced** to complete the Negate, so that you can tell the system how you are refunding the money. A common mistake is to **Void** the negated workorder, which undoes the Negate.

Copy Invoice Using Current Prices

This will create a workorder which duplicates the lines of the selected invoice, using current prices.

Copy Invoice with Original Prices

This will create a workorder which duplicates the lines of the selected invoice, using the same prices as the original invoice.

- ✿ If you are doing a negate for a customer who was charged on account you will have to apply the credit from the negate to the original invoice in order for the balance to display correctly. You will do this in the [customer payments](#) section.

Workorder Status

Navigation: In the **Sales Entry** window, click button in the *Status* column on the line of the desired Workorder.

Here you can change the status, send a Text Message, enter internal notes, and [schedule an appointment](#) and pick-up time for the Workorder. By keeping the status up to date, you can easily scan the list of Workorders on the bottom half of the window and know how things are going. When a Customer calls to see how their vehicle is doing, you can immediately tell them whether it is in progress, on hold, or completed, and why.

Change to Status:

Select the appropriate status of the job.

Send Text Message

If you have your email settings configured, you can send a text message to the customer here. The default message will depend on the current status.

Internal Notes

This section typically describes issues with the Workorder. It could tell why it is on hold, or why it will take longer than expected. These notes are not printed on the Workorder or Invoice.

Scheduled Time

Click the **Clock** icon on the Scheduled line to change the scheduled time. This will bring up the Scheduler window so you can see how busy your days are and schedule your date and time accordingly.

Pick-up Time

Click the **Clock** icon on the **Pick-up** line to change the pick-up time. This pick-up time can be viewed in various places.

- In this Workorder Status window.
- In the invoicing window.
- On the printed Workorder, if [System Settings](#) have it set to print there.

- In the [Scheduler](#), the pick-up time is in the top right corner of the window, and can be changed there.

Normally, this will be the standard pick-up time as set in the system settings. To change the standard time:

- Go to the [Sales Settings](#) Tab of the **System Settings** window.
- Click the Clock icon at the bottom of the window.
- Select the most common time.
- In the [Defaults – W/O](#) tab, you can check or uncheck the box labeled *Print the standard Pick-up time on all new Workorders*.
- Save your changes.

Unschedule

If this workorder has been scheduled, you can unschedule it here.,

Change Button

Press this to save your changes and close the window.

Cancel Button

Press this to abort your changes and close the window.

Paid-Outs and Paid-Ins

Navigation: From the Main Menu select the **Sales Entry** button. Then press the **Paid In/Out** button at the bottom.

This is where you track money going in and out of the cash drawer that is not because of sales and returns. Example **Paid-Outs** might include:

- Taking a \$20 bill from the drawer to pay for gas.
- Taking cash to pay for a business lunch.
- Writing a check to a supplier. However, this should only be done if no bill has been, or will be generated for that item.

Example **Paid-Ins** include:

- A vendor might give you a check for a return or a bonus.
- Returning the change from the business lunch to the cash drawer.

In this window, you can:

- Create new **Paid-Outs** and **Paid-Ins**.
- Review existing **Paid-Outs** and **Paid-Ins**.
- Void **Paid-Outs** and **Paid-Ins**.

First select a Vendor. You may enter the first part of the Vendor's company name in the yellow box above the Company Name title. To see all Vendors again, press the **Clear** button at the top of the window.

Once a Vendor is selected, their existing Paid-Outs will appear in the center list-box, as long as the **Show Prior Cash Paid-Outs** box is checked at the top of the window. Since **Paid-Outs** and **Paid-Ins** are dealt with almost identically in this window, only the Paid-Outs will be described.

Creating a Paid-Out – an Overview

- To create a new Paid-Out for the selected Vendor, press the **New Paid-Out** button.
- If it was paid by a check, click the checkbox and enter the check number used.
- Fill in a Description for this Paid-Out, so it can be identified in the future.

- Then press the **New Line** button, or press the *Enter* key.
- Then select an asset or expense account to post the Paid-Out to. For instance, it could be an *Inventory Parts* asset account, or a *Freight expense* account. A good practice is to type in the first few letters of the account, and then use the arrow keys to select the account.
- Then press the *Tab* key and enter an amount to post to the selected account.
- Press the **Save Line Changes** button (or press the *Enter* key.)
- Continue to press the **New Line** button or the *Enter* key to add lines as needed.
- Finally, verify the Sales Rep, the date and the Paid-Out total, and press the **Save Paid-Out** button.

Vendor Paid-Outs – Details

- **New Paid-Out Button:** After selecting a Vendor, press this to create a new Vendor Paid-Out.
- **Void Paid-Out Button:** If you select a Paid-Out in the middle list-box, you can press this button to void it.
- **Clear Button:** If you have entered Vendor search information in one of the yellow search boxes, you can press this button to clear the search and view all Vendors again.
- **Description:** Enter the purpose of the Paid-Out.
- **Reference:** If not paying by check, you can enter an Invoice or other reference number here.
- **Paid by Check?** If you check this box, you will need to enter the check number used. If the check number has already been used, you will be warned.
- **Rep:** Make sure your name is here.
- **Date:** The date the Paid-Out is to be posted to the General Ledger.
- **New Line:** Press this button to add a line containing an amount to post and an expense account.
- **Delete Line:** After selecting a line below, press this button to delete it from the Paid-Out.
- **Expense Account:** This is an asset or expense account to post the Paid-Out to. For instance, it could be an *Inventory Parts* asset account, or a *Freight expense* account. A good practice is to type in the first few letters of the account, and then use the arrow keys to select the account.
- **Amount:** The amount to be applied to the account specified above.
- **Save Line Changes:** Press this button (or press the *Enter* key) to save the new line.
- **Cancel New Line:** Press this to cancel the new line completely.
- **Save Paid-Out:** Press this button when all the lines have been entered for the Paid-Out, and after verifying the terms, the dates and the Paid-Out total.
- **Cancel:** Press this button to abort this new Paid-Out completely, losing all of your changes.

Sales Report / Daily Report

Navigation: From the Main Menu press the **Sales Reports** button

The **Daily Report** is the most important report that you will work with in the system. With it, you can see summaries of your sales, inventory, bills and other information that occurred throughout the day. As its name suggests, the daily report should be run daily at the end of every business day.

Generating a New Report

- To run the report at the end of the day, check the radio box that says *Generate a new Daily Report* and press the select button.
- the Daily Deposit window will appear. Here is where you can verify the total cash in the cash drawer, the total checks received, etc. If you make any changes, they will be reflected in the overage/shortage column on the right, and they will post to the over/short account setup in the [General Ledger](#).
- After making the needed changes, if any, press the **Save & Print** button to continue. The Daily Report will then print to the screen to be previewed. To print the report press the Printer icon at the top of the screen.
- After closing the report window, you will be given the option to post the day. If everything looks correct you may select the Post option.



Note: If you have multiple stores, your inventory control totals will be for the individual stores. You will want to generate a daily report at each location. Depending on your setting [HERE](#), your customer control total may either be for the current store, or for all the stores.

Posting to Accounting Software & the Pre-Posting Trial Balance (only available with the Accounting Module)

When you post the day, if you have the **Accounting Module**, the Pre-Posting Trail Balance will print to the screen. It can also be reprinted by selecting a report in the list and pressing Reprint the Pre-Posted Trial Balance.

This report will detail exactly what will be posted to your accounting software like QuickBooks or Sage 50. As you can see from the report, only summaries from each module of the system are sent to your accounting software. This is because some programs like QuickBooks Pro will eventually get bogged down, run slowly, and even run into data size limits. AutoFluent, however, has a more robust database system, and can easily handle large amounts of data. Therefore, the transaction details are posted into the AutoFluent database, and are available in the [Audit](#) section.

You will be asked if you would like to finalize the post and post all remaining reports to your Accounting Program. If you would only like to post to AutoFluent and not to the Accounting program you may uncheck the associated box. You will have the chance to post to the accounting program later, even multiple days at a time. Then press the Finalize Post button.



Note: If you are using Quickbooks remember that you must be logged into the company file in Quickbooks in Single-usermode and as an administrator in order to post from AutoFluent.

Details

- **Audit** – With the Audit button you can get more detailed information regarding the report and the accounts that are associated with them.
- **Browse Invoices** – Press this button to see the list of invoices associated with this report..
- **Clear Button** – This will clear out any selected information.

Common Chores

Note that some of these will not apply if you do not have the **Accounting Module**.

- **Reprint the Selected Daily Report** – Select a report from the list, check this radio box, and then press the **Select** button.
- **Mechanic Tracking** – For more information on mechanic tracking, [Click HERE](#).
- **Posting Report to Accounting Program Later**
 - Select a report from the list which has the **Posted** checkbox checked, but not the **QB** checkbox.
 - Select the radio box that says **Post the Report(s) to Quickbooks**
 - Press the **Select** button.
 - This report **and** all unposted earlier reports will be sent to your accounting system.
- **Reprinting the Pre-Posting Trial Balance**
 - Select a posted report
 - Check the **Reprint the Pre-posting Trial Balance** button.
 - Press the **Select** button.

Auditing

Navigation: From the Main Menu, click **Sales Reports**, and then the **Audit** button.

If you have the Accounting Module, this window offers various simple but powerful ways to analyze how your transactions are posted to the General Ledger. It also provides a **Transaction Journal Report**. There are three modes, or ways of looking at your data. To select a mode, click one of the three circles at the top of the window.

Transactions by Journal

This is perhaps the most useful of the three modes. Simply select a Daily Report and a Journal, and all the transactions for that day in that Journal will be displayed. You can then click the various transactions to see exactly how each of them got posted to the General Ledger.

Journal Summaries

In this mode, after selecting a Daily Report and a Journal, you can see the summary totals that got posted to your accounting software. These are the same totals that print on the Pre-Posting Trial Balance report.

Note that you can also select a date in the left center list. For example, if you entered some Vendor Invoices today for several dates, each date would appear in this list, and an account summary would exist for each day. This is so that the totals get posted to the correct days in your accounting software..

For each account you select in the Journal Summaries list-box, you can see all the transactions in the Transactions list-box that affected that account. Note that the entire transaction amount will not appear in the Transaction list-box. For example, if you select the Sales Tax account in the Sales Journal, in the Transactions list-box you will see all the transactions for the day that included sales tax. The transaction Debit or Credit amount would represent the amount of sales tax on that transaction. To see the entire transaction, press the Preview Transaction button.

Account Detail

In the Account Detail mode, you view all the activity in a given account on the selected day, and you can print a **Journal Transaction Report** for that account.

After an account and date range are selected, the Partial Transaction list-box shows you all the transactions for that account on that day, which can then be printed with the **Print** button. The Debit and Credit amounts

represent only the part of the transaction posted to that account. For example, if you are looking at the Sales Tax account, the amounts on the sales transactions will only reflect the sales tax of that transaction. To view the entire transaction, press the Preview Transaction button.

The Journal Entries list-box lists all the journal entries corresponding to the transaction selected in the center list-box.

Preview Transaction

Press this button to see the details of the selected transaction. With some transactions, like Invoices and Customer Adjustments, you will be given the option to print by pressing the Printer icon at the top of the screen, as well as view.

View Notes

If there are posting errors or other problems with the selected Daily Report, this button will be available. Pressing it will let you view the error log of the day.

Print Report Button

Press this button to view and/or print the Pre-Posting Trial Balance corresponding to the selected Daily Report. This report lists the summary entries that get posted to your accounting software. These summary entries can be viewed by selecting the Journal Summaries mode, and looking at the entries in the Journal Summaries list-box when selecting the various journals.

Mechanic Tracking

Navigation: Click **Sales Report** from the Main Menu, then click **Mechanic Tracking**.

Here you can track the various jobs your mechanics have finalized, adjust the hours, and print your Mechanic Efficiency Report.

Viewing

- Change the date range in the top to specify which entries to view.
- If you have your mechanics clock in on jobs, you can click **Include Chores** to see what non-invoice-related jobs they have done.
- Click on the **headings** of the grid to sort the list forward or backward by a given column.
- Click **Preview Invoice** so see the invoice corresponding to the selected row.
- Click **Refresh** if you think changes may have been made on another workstation since opening this window.

Editing

Every job that has been finalized, and which has both hours and a Mechanic assigned, will appear on this list. The Billed hours comes from the workorder. The next hours column will be the same as the billed hours, unless you are having your mechanics clock in and out on jobs, in which case it will reflect their actual hours. In either case, you can:

- Edit the hours of the main mechanic
- Select up to two additional mechanics who helped on the job, and enter their hours as well.

In case of mistakes made during workorder entry, you can add and delete these lines.

- The **New** button will let you create an entry and assign it to a finalized invoice.
- The **Delete** button will let you remove entries from this list.



Editing, adding or deleting lines in this window will **only** affect the Mechanic Efficiency Report (see below), and will not affect your sales or invoices in any way.

Print Report

Click this button to generate your Mechanic Efficiency Report based on these entries. There is a variety of options, such as selecting any date range, hiding dollar amounts, and printing separate pages for each mechanic.

Inventory Entry

Navigation: From the Main Menu press the **Inventory Entry** button.

Within the inventory entry screen you will be able to enter and edit your inventory Items. Everything that can be on a workorder should be entered here including not only physical parts but labor, fee's, packages etc.

Note for Multiple Stores

If you have multiple locations, you will be sharing the same inventory. Most changes you make to your inventory from any store will change it universally among the other stores. If you would like to see the available quantity of each item per store you can use the [Inventory Search](#) window. These are the items that are **unique** from store to store:

- All costs
- Quantity on hand and available
- Reorder levels
- Spiffs
- Purchase Order information

Entering Inventory

Navigation: From the Main Menu select the **Inventory Entry** button.

To Create a New Stocked Part

- Press the **New** Button
- **Size/Item:** If this is a tire or wheel, this is the size. Otherwise, this should be a general name for the item, a category if you will. For example, if you are entering a filter you might enter *OF* or *OIL FILTER* as the size/item. All other Oil filters will share this name, making them easy to search for.
- **Catalog:** This is a unique number for this particular part. You can either make it up, or enter the part number. This is the number that can be entered in the workorder to bring up the item, and it prints on the final invoice, unless you have a [System Setting](#) which says otherwise.
- **Type:** Since this is a stocked item you will select the *Part* type.
- **Description:** Here you can enter more detail for the part. This description will appear in the workorder for the customer to see. However, it can be manually changed in the workorder as well.
- **Item Group:** Item Groups help organize parts into groups so that you can get a clear summary on your Daily Report of where you are making money and where you are not. For instance, if you sell tires and want to see how many new tires vs. used tires you sell, and which is more profitable, you will want to create a new item group for New Tires & another for Used Tires. You could also break your new tires into several groups, based on brand or size if desired. Entering an item group of some sort is required when entering a part. For more information on setting these groups up refer to [Setup Item Groups](#).
- **Next Linked Item:** This line is not required. However, if you would like to attach this item to another item so that they both are added to the workorder at once, you may use the Next Linked item to add it. For instance you may want to link all New Tires to the New Tire Package so that any time a new tire is placed on a workorder the package with all of its associated items are added as well. This package will also be seen in the [Inventory Search](#) window, so that you can quickly quote your customers out-the-door prices (including sales tax) on tires, flush packages, etc.
- All other information is optional, you can make AutoFluent as customized as you want.
- Press the **Save Changes** button when you are done.



A much faster way to create an item is to select a similar item and click the **Copy** button at the top.

To enter the current quantity of this part, you will use the [Adjustments](#) button.

 Note: If you have different prices for parts at different store locations you can assign any of the 12 [price levels](#) to each store and change the prices accordingly.

To Create a New Miscellaneous Part

A miscellaneous part is an item that you have at the shop for sale, but for which you are not concerned about the quantity. Examples could include valve stems, nuts and bolts.

- Press the **New** Button (or select a similar item and press **Copy**).
- **Size/Item:** The size item should be a general name for the item, a category if you will. For example if you are entering a nuts you might enter *NUTS* as the size item. All other nuts will share this name, making them easy to find.
- **Catalog:** The catalog number is a unique number for this particular part. You can either make it up or you can enter the actual part number.
- **Type:** Since this is a miscellaneous part, you will select the *Misc. Part* type.
- Press the **Save Changes** button when you are done.

To Create a Labor Item

AutoFluent has within it a default shop labor. You can find this by typing *SL* into the yellow search box of the catalog column. The default Shop Labor price is \$70 per hour for Retail. However, you can change this manually for each price level (Retail, Commercial, Wholesale etc).

If you would like to create more labor items for different jobs you can Select the **New** button and enter the appropriate information along with labor rates.

 **Important Note:** The default **SL** item must remain in the system and should not be deleted.

Summary of Inventory Items

Comment

Enter free-form text such a description that you would like to add to workorders.

Disc Invoice

This item applies a discount to the whole invoice total. You can set a percentage to be discounted and can add a minimum/maximum amount to be discounted. For example, let us say you would like a discount of 10% that would not exceed \$30. Using the drop down box you can select to base the discount on specific types of inventory items, or leave the default *Base on total before tax*.

Disc Line

This item applies a discount to the line above it in a workorder. For example if you entered an oil filter and set this discount to be 10% you would add the oil filter to the workorder first, and then add this discount line to take 10% off of the filter but not off any other items.

Fees

Nontaxable fees and taxes (not sales tax)

Freight

Freight charge that will be charged to the customer

Gift Card

This item is for gift cards that can be purchased. Let the different price levels be the amount on the Gift Cards or leave it zero and change the price manually in a workorder

Heading

Text that can be added to the top of a Package.

Subtot

This is typically the last line of a Package.

Labor

This is for labor you do in your shop, and it is not costed. However, if you assign a mechanic to the line in a workorder that has an hourly rate set up in the [Employee Setup](#), the cost of that mechanic will be used.

Lube

A package specifically for lube jobs. You will set defaults for the filter, oil viscosity, etc.

Misc. Part

This is a part that you keep in stock but do not count, like nuts & bolts.

Outside Labor

Out-sourced labor. The cost of this item, and the name of the company doing the work can be entered in the workorder.

Outside Part

This is a part that you do not keep in stock but order as needed. The cost of this item and the name of vendor can be entered in the workorder.

Outside Tire

This is a tire that you do not keep in stock. The cost of this item and the name of vendor can be entered in the workorder. Similar to the Outside Part Type.

Package

Packages contain other inventory items, much like a workorder. For more information on how to create a package [Click HERE](#)

Part

Part that you keep in stock, for which you track the quantity on hand.

Retread Tire

This is a retread tire that you do keep in stock, for which you track the quantity on hand.

Supplies

Shop supplies that can be set as a dollar amount and/or percentage and charged to the customer. The percentage can be based on parts, labor, or both, and minimum and maximum amounts can be set. Automatic Shop Supplies can also be setup to automatically be added to all new workorders.

Tire

Tire that you keep in stock, for which you track the quantity on hand. Similar to the Part Type.

Warranty

Warranty that a customer can purchase. You can set as a dollar amount using the box “plus what dollar amount” or you can set a percentage with a minimum and maximum dollar amount.

Excel Importer: Updating Inventory Costs & Vendor Catalog

Navigation: This particular program cannot be accessed from within the Software but from the AutoFluent Program File typically found here C:\Program Files (x86)\TABS AutoBiz or here C:\Program Files\TABS AutoBiz. Select the file named *ExcelImport.exe* (the most recently modified file). You may create a shortcut for this program on your desktop.

The Excel Importer gives users the ability to update the cost of their inventory or to add new items to their vendor catalog using an excel spreadsheet.

Importing parts into the vendor catalog

- Launch the Excel Importer Program
- Copy all of the lines from the Microsoft Excel spreadsheet that you would like to use.
- Press the* Paste from Excel *button in the Excel Importer.
- **Vendor:**Select the desired Vendor from the drop down box.
- **Store:** Select which store you would like these items sent to.
- **Item Group:** Press the Change button to add to a different item group other than the default Catalog
- **Item Type:** Select the type of item that is being imported example: Tire/Parts.

You will now enter the column letter associated with each header. This will vary depending on where this information is found on your Excel spreadsheet. For example, on your spreadsheet the cost for the item may be in column H therefore you will enter the letter H in the cost box found in the Excel Importer. The description for your item in your spreadsheet may be found in column B, in this case you will enter the letter B in the description box found in the excel importer. You will do this for all boxes whose information you wish to import.

When the above information has been filled out press the **Import** button. The items will now be available in your Vendor Catalog.



Note: The Vendor Catalog is not the same as your regular inventory however, items can be added to your inventory from the vendor catalog. For more information on the vendor catalog [Click Here](#).

Updating Costs of your Inventory

Follow the same steps as above, on the last step instead of pressing the **Import button** instead choose the **Update Costs** button.

Creating Invoice & Line Discounts

Navigation: From the [Main Menu](#) select the [Inventory Entry](#) button.

Creating a Discount for the Entire Invoice

- Select the **New** button
- Enter a *Size/Item* name for this item.
- Enter a catalog code for this item (this must be a unique code to any other item in your inventory).
- Using the drop down box change the Type of this item to *Disc Invoice*.
- Enter a description (this will be displayed on your workorder and invoice copies).

Item Group: Select an Item group for this discount.

What % of Total Before Tax: You can set a percentage for your discount by entering a number in the

Drop-down box: Use the drop down box to set a rule for this discount like *Base on Total Before Tax* or *Base on Tires Only*.

Plus What Dollar Amount? If you'd like to have a flat dollar amount discount you may enter it in this box.

Minimum/Maximum Dollar Amount: If you're discount is set to a percentage but you'd like to set rules for a minimum and maximum amount you may set that in these boxes. For example, if you are giving a 10% discount on the total of the invoice for a minimum of \$5 but no more than \$10 you would enter \$5 in the minimum dollar amount box and \$10 in the maximum dollar amount box.

Creating a Discount Line

Use this option if you'd like to add a discount to one single line on a workorder you will add the discount line after adding the item you'd like to discount onto a workorder.

- Enter a *Size/Item* name for this item.
- Enter a catalog code for this item (this must be a unique code to any other item in your inventory).
- Using the drop down box change the Type of this item to *Disc Invoice*.
- Enter a description (this will be displayed on your workorder and invoice copies).

Item Group: Select an Item group for this discount.

What % of Previous Item: You can set a percentage for your discount by entering a number in the

Plus What Dollar Amount? If you'd like to have a flat dollar amount discount you may enter it in this box.

Minimum/Maximum Dollar Amount: If you're discount is set to a percentage but you'd like to set rules for a minimum and maximum amount you may set that in these boxes. For example, if you are giving a 10%

discount on the previous line for a minimum of \$5 but no more than \$10 you would enter \$5 in the minimum dollar amount box and \$10 in the maximum dollar amount box.

Creating a Package

Navigation: From the Main Menu press the **Inventory Entry** button, press the **New** button and use the **Type** drop-down box to select *Package*.

Inventory packages make creating workorders and quotes much more efficient. If, for example, you have a tire and attach it to a tire package, you can then instantly see the mounted and balanced out the door price for one or more tires, including all taxes and fees, with or without warranty. Below are some examples of packages. However, feel free to customize your packages in any way you want.

Example 1: Creating A Tune-up Package

In this tutorial, we will create a tune-up packages for 4 cylinder vehicles. We will assume that all the items in the package have already been created in the inventory.

- In the inventory Entry Window press the **New** button
- For the Size/Item enter: *TUNEUP*
- For **Catalog** enter: *_ TUP4_* (Common items should be abbreviated so that they can be entered quickly from the keyboard into the workorder.)
- For **Type**, select *Package* (You will see that the lower portion of the screen changes to resemble a workorder)
- For **Description** enter: *Install new spark plugs, adjust timing if necessary, inspect cap, rotor wires, air filter.*
- In the first Catalog number of the list-box below enter *TUL* (This is a labor item.)
- Press the tab key or click on the description field of the line.
- Leave the quantity at one and the price at \$70 and go down to the next catalog number.

Now we will add all outside parts because you do not stock any of them. For sales tracking purposes, we will have an outside part for each of the items. The costs will be entered when the package is used in the workorder. The Tune-Up package will look like this:

Catalog	Description or Comment	Qty	Price Override
TUL	Install Spark Plugs, Inspect Cap/Rotor/Wires/Air Filter	1	\$70.00
OP-P	Spark Plugs	4	\$0.00
OP-C	Distributor Cap	1	\$0.00

OP-DR	Distributor Rotor	1	\$0.00
OP-AF	New Air Filter	1	\$0.00
OP-W	Spark Plug Wire Set	1	\$0.00
	Check ignition components, platinum plugs & transverse engine if applicable	0	\$0.00

If we wanted to offer a different price for the labor item *TUL* than the current \$70 when it is in this package, then we can change the price for it manually and check the box next to it that says **Use Override**. If the Use Override box is not checked then the system will use the current price for the item in the inventory entry, according to the selected customer's price level. Press the **Save Changes** button to save all the lines of the package.

Example 2: Creating a Tire Package

In this tutorial we will create a package that we will attach to each of our tires. We will assume that all of the items in this package have already been put into the inventory.

 **Note:** You can associate a package to all tires, or all items fitting certain criteria in the [Price Changes](#) window.

- In the inventory entry window press the **New** button.
- For **Size/item** enter: *PK*
- For **Catalog** enter: *PKTIRE* (Common items should be abbreviated so that they can be entered into the workorder quickly from the keyboard.)
- For **Type**, select **Package** (You will see that the lower portion of the screen changes to resemble a workorder.)
- For **Description**, enter *New Tire Package*.
- In the first catalog number of the list-box below enter: *TR13* (our Valve Stem.)
- Press the *Tab* key or click in the description field to fill in the line.
- We will also be entering our labor item *WBP*, and our waste disposal fee *DFP*.
- We will also enter our optional item *RHP*, This is a warranty item that the customer can accept or decline.
- Make this an optional Item by clicking the box in the Optional column. If declined the item will not be added to the workorder.
- On the next line, leave the **Catalog** blank, and enter this description: *** Free Rotation every 5000 miles ***
- Press the **Save Changes** button to save all of the lines of the package.

To associate new tires to this package:

- Go into the **Inventory Entry**,
- Search for and select the desired tire
- In the **Next Linked Item** box enter *PKTIRE*,
- Save your changes.
- As mentioned above, you can set the **Next Linked Item** for many items at once in the [Price Changes](#) window.

You can create different packages for used tires, light truck tires, etc. Once this is done, creating workorders and quotes will be a breeze, and you will be able to quote a tire package on the fly in the inventory search window without even creating a quote.

Details

Insert

Click this to insert a blank line before the selected line.

Delete

Click this to delete the selected line.

Undo

Click this to undo all the changes you have made to the package since the last save.

Fixed Total

If you would like the package to have a fixed total every time it is entered on a workorder, you can enter it here and check the **Fixed Total** box.

Obsolete

Instead of deleting a package, it is preferable to check the obsolete box. This will preserve the history for reporting purposes.

Group (optional)

You can attach any package to a specific item group much like regular inventory parts. This is only optional, and is strictly for searching purposes.

Clear group

Clears the selected group from the drop down box.

Bold/Italic

If you would like a certain line to be boldfaced or italicized, you can select the line and check the appropriate box.

Don't print on invoice

To hide a line on a package when the invoice is printed, select the line and check this box.

Don't print on workorder

To hide a line on a package when the workorder is printed, select the line and check this box.

Purchase Orders

Navigation: Press the **P/O** button at the top of either the **Vendor Entry** window or the **Inventory Entry** window.

Here you can receive inventory from your vendors. Optionally you can create vendor bills from the purchase orders as well. If the vendor called *Inventory Adjustments* is selected, an Inventory Adjustment will be created rather than a Purchase Order.

Vendor Purchase Order Overview

With a Vendor other than *Inventory Adjustments* selected:

- Press the **New** button in the center of the window to create a new **Purchase Order**..
- Fill in the Reference and optionally the Notes boxes with a descriptive name of this P/O.
- Press **Save Changes**.
- Press the **New Line** button to create a Purchase Order.
- If you know the catalog number of the item, you can enter it now. Otherwise press the ... button to select it from the **Inventory Search** window.
- **Now you have a few choices:**
 - If you have ordered but not yet received the item, enter the quantity ordered where it says Order.
 - If you have received it but it is not ready to be invoiced yet (or if you want to enter the Vendor Invoice manually,) enter the quantity received where it says Receive. The Order quantity will be filled in automatically.
 - If this P/O is ready to be invoiced, you can skip the first two numbers and simply enter the quantity where it says Invoice, so an Invoice will be generated automatically.
- Adjust costs and/or prices if desired.
- Press the **Save Line** button, or press the *Enter* key.
- You can press **New Line** again to enter another inventory item and repeat the procedure above. To delete the selected line, press the **Delete** button.
- When you have finished entering lines press the **Process All Changes** button which will update the inventory quantities. Remember that your inventory is not updated until this button is pressed. * If any items have been marked to be billed, pressing **Process All Changes** a window where you can create the bill. Here you can add any applicable freight, discounts or surcharges, and press **Create Vendor Bill**. This will take you to the [Vendor Bill](#) window, where you can verify the terms, and add any other

desired charges. If you make any changes, press the **Save** button to update the Bill. For more information, see the [Vendor Bill](#) section.

To review items for another P/O, simply click on another line in the middle list. To add items to a different P/O, select that P/O and press the **New Line** button.

* Note that when you press Process All Changes, the quantities move from the Qty Ordered, Qty Received and Qty Invoiced columns to the Prev Ordered, Prev Received and Prev Invoiced columns. At any time, you can adjust these quantities by changing the numbers in the Qty Ordered, Qty Received and Qty

Price Changes

Navigation: From the **Inventory Entry** window and press the orange **Price Changes** button

The **Price Changes** window lets you change prices, costs, spiffs and temporary discounts for a range of inventory items. Before changing prices you are allowed to preview all changes and make sure they are what you want. There is also a Use Snapshots button to simplify making similar price changes later on down the road.

* Note: Since you can rename your price levels however you like, in these examples we will call the first price (usually Retail) Price A and the second Price B.

Example 1: Selecting Items to Change

If you are using the **SnapShots** button, see **Example #3** below. Otherwise, the first step is to select the inventory items you want to use. You can use any combination of catalog numbers, sizes, types and groups. For instance, if you have an Item Group for Michelin Tires, you can select that group, and then select a range of sizes in that group.

After entering your criteria, press the Preview Selection button. To start over, press the Clear Entries button. Let's say we want to change prices on all the catalog numbers of our *Sport Michelin* tires with *MIC*, but only tires with sizes beginning with *195*.

- Enter *MIC* as the **From Catalog #**.
- Enter *MICZ* as the **To Catalog #**. Thus we select all of our items beginning with *MIC* as the **To Catalog #**.
- Enter *195* as the **From Size**.
- Enter *196* as the **To Size**.
- Enter *Sport* as the **Keyword in Description**.
- Now press the **Preview Selection** button to see what we come up with.

Once you have selected the items you want to change, the next step is to specify how they are to be changed. A few examples are offered below. Each example assumes you have already selected some inventory items using the methods above.

Example 2: Setting Prices for New Items

Let us say that when we originally entered these items into inventory, we only entered the cost, and there are no prices yet. We want to set Price A to a 40% markup, and Price B to be 10% less than Price A.

- If you have not yet done so, select the items to change following Example #1 above.
- On Price A, press the **Change** button.
- On the first drop-down, select **Catalog Cost**.
- Enter 40 for the percent.

 If we wanted a 40% profit margin rather than a 40% markup, we would click the '+' and change it to an 'M' for Margin.

- On Price B, press the **Change** button.
- On the first drop-down, select Price A (or whatever your first price is called.)
- Click the + button to change it to a minus sign (-).
- Enter 10 for the percent.
- Press **Preview Selection** and click on a few inventory items, noticing the Before and After columns.

 **Warning:** The next step will change the prices in your inventory, so be sure you review the After column to make sure you will be satisfied with the results. and click on a few inventory items, noticing the Before and After columns.

- If everything looks correct, press the **Update Inventory** button and answer yes.

Example 3: Implementing a Cost Increase

We just had a 9% cost increase on these Michelin tires. We need to first increase the cost, and then recomputed the Price A and Price B. But this time, let's round everything up so it ends with 99 cents.

- On the Catalog Cost, press the **Change** button.
- Select **Catalog Cost** on the first drop-down.
- Enter 9 for the percent.
- On Price A, press the **Change** button, unless it already says **Change To**.
- On the first drop-down, select **Catalog Cost**.
- Enter 40 for the percent.
- Select **Up to 99 cents** for the rounding.

- On Price B, press the **Change** button, unless it already says **Change To**.
- On the first drop-down, select Price A (or whatever your first price is called).
- Click the + button to change it to a minus (-).
- Enter 10 for the percent.
- Select **Up to 99 cents** for the rounding.
- Press the **Preview Selection** button.
- If you like what you see, press the **Update Inventory** button and answer yes.

Let's save this **SnapShot** for later, so the next cost increase will be easier.

- Press the **Use Snapshots** button.
- Enter a name for the new SnapShot.
- Press the **Save SnapShot** button.

Example 4: Snapshots

Months have gone by, and the costs have just gone down 4%. If you just did the Example #3 above, close the Price Changes window so we can start fresh.

- Re-open the window and press the Use Snapshots button.
- Select the one created in **Example #3**, if it is not already selected.
- Under **Catalog Cost**, change the '+' to a '-', and change the 9 to a 4.
- Press the **Preview Selection** button.
- If you like what you see, press the **Update Inventory** button and answer yes.

What could be easier? Once the Snapshots are set up, you need never fear price changes again.

Example 5- Temporary Discounts

We want to have a one-week 10% discount on a line of tires that we got a special purchase on.

- Select a range of items to discount by filling in the Catalog numbers, sizes, types and/or groups as before, and press the **Preview Selection** button to fill the list-box with some items.
- Click the **Temporary Discounts** radio button in the center of the window.
- Select the date range in which you will run the special.
- On Price A, press the **Change** button, unless it already says **Change To**.
- On the first drop-down, select Price A (or whatever your first price is called.).
- Click the '+' button to change it to a '-'.

- Enter 10 for the percent.
- Do the same for any other price level you want to discount.
- Press **Preview Selection** and click on a few inventory items, noticing the Before and After columns.
- If everything looks correct press the Update Inventory button and answer yes.

Example 6- Spiffs

We really want to move some old tires, so let's try putting a spiff on them for a couple of weeks.

- Select a range of items to discount by filling in the Catalog numbers, sizes, types and/or groups as before, and press the Preview Selection button to fill the list-box with some items.
- Click the **Spiffs** radio button in the center of the window.
- Click the **Spiff Runs From** radio button.
- Select the date range in which you will run the Spiff.
- If we wanted to give a flat \$5.00 a tire, we could just replace the \$0.00 with a 5 and we would be done. However, we want to base the Spiff on the price.
- Select **Percent of Price** from the drop-down.
- Select Price A (or whatever your first price is called) from the first drop-down.
- Click the '+' button to change it to a '-'.
- Enter 95 for the percent.
- Press **Preview Selection** and click on a few inventory items, noticing the Before and After columns. As you see, the Spiff is now 5% of the Price A (Price A minus 95%.)
- If everything looks correct press the **Update Inventory** button and answer yes.

Example 7- Linked Items

We just decided that all Michelin tires we sell would come with the New Tire package.

- We first decide which package we will link the tires to. In the sample and start-up data, a package called **PKTI** has been set up as a new tire package. See the section on [Packages](#) if you would like to modify this package or add a new one.
- In the Price Changes window, type *MIC* in the **From Catalog #** line and *MICZ* in the "to" line and press the **Preview Selection** button to fill the list-box with Michelin tires.
- Select the **Linked Items** tab.
- Enter *PKTI* for the **Linked Item**, or click the ... button to select it from the **Inventory Search** window.
- Click the **Update Inventory** button.

Inventory Adjustments

Navigation: Press the **Adjustments** button at the top of the **Inventory Entry** window.

Normally, Inventory Adjustments should only be used to set your initial quantities, and to fix your quantities when items are stolen or damaged. When you receive items from your suppliers, or return items to them, Purchase Orders should be used. Purchase Orders are the better choice because:

- You track who you ordered your parts from.
- You can send your suppliers printed or emailed Purchase Orders.
- You can compare the ordered with the received, and track backorders if desired.
- You can create and verify Bills automatically.
- You can automatically generate Bills when your stock gets below your reorder levels.

That being said, there are still some shops who use Adjustments exclusively, and create their bills manually.

Adding / Subtracting a Quantity

- In **Inventory Entry**, select the item in your inventory list.
- Press the **Adjustments** button at the top of the window.
- Adjust the quantity in one of these two ways:
 1. In the **Quantity to Add or Subtract** box, enter a positive or a negative number.
 2. Enter the current quantity in the **New Quantity** box.
- You can now press **Post Adjustment** to complete the adjustment. Alternatively, before pressing this button, you can make the following changes:
 - You can check the **Adjust Quantity as of** box at the top of the window and enter a date and time. For example, if you know you had 20 of this item last night at 6:00pm, but are not sure if any have been sold or purchased since then, you can set the date to yesterday at 6:00pm and set the **New Quantity** to 20.
 - You can enter your new cost, if it has changed.
 - If this new cost will be the regular cost from your supplier, check the **Update Catalog Cost** box.
 - If you change the cost, you have the option of also adjusting your prices accordingly.
 - If you check the **Use Current Group Margins** box before recalculating the prices, it will set the prices according to the markups or margins specified in the [Item Group Setup](#).
 - Otherwise the prices will be adjusted by the same percentage that the cost changed. So if you raise the cost by 10%, the prices will go up by 10%.

- You can also press **Create a New Batch** before posting the adjustment. All adjustments are put into batches, which are accessible in the [Purchase Order](#). If you do not press this button, the adjustment will be added to the most recent batch. Otherwise, you can enter a date, reference number and notes, and then press the **Create a New Batch**, so that later you will be able to look back and see why you made the adjustments.

Posting to General Ledger

If you have the Accounting Module, you can check the radio box **Post to G/L** if you wish for it to post:

- If you will be creating a bill for receipt of this item, do **not** check this box.
- If you are just adjusting your inventory because of a mistake or a theft, you would check the box.

Inventory Transfers

Navigation: From the Main Menu select the **Inventory Entry** button and select the Transfers button. This window is also accessible from the **Stores** tab of the [Inventory Search](#) window.

Using the Inventory Transfers feature of AutoFluent you will be able to request, receive and keep track of inventory items that are being sent between your different locations.

Request Transfer

If you are in need of an item at another location, follow these steps:

- Select the item from your inventory and press the **Transfers** button.
- Navigate to the **Request Transfer** tab.
- In the **Quantity to Request** box, enter the quantity to request.
- Select which store you are requesting the item from.
- Optionally, you can do the following:
 - Select your name in the **Sales Rep** drop-down box.
 - Enter a reference number and notes if desired.
 - You can select a different day for the request other than the current day by using the drop-down.
- When everything looks correct, press the **Create Request** button.
- You may print the transfer request by pressing the **Print Transfer Request** button

Fill Transfer Requests

If you have received a transfer request from another store and wish to fill that order, follow these steps:

- From **Inventory Entry**, press the **Transfers** button
- Navigate to the **Fill Transfer Requests** tab
- Within the tab you will see a list of all items that have been requested, along with such information as the Store the request was made from, the Catalog # of the parts, and other information.
- If you will be filling all you requests, simply press **Send All Requested**, and press the blue button to **Print Packing Slip & Mark As Sent**.
- Otherwise, select each item that you will be sending, and for each item:
 - Verify or adjust the **Quantity to Send** in the bottom left corner.
 - Click **Prepare to Send**.

- If you make a mistake, simply enter a different quantity and click **Prepare to Send** again. Or click **Set All to Zero** to start over. Nothing is sent until you press the blue button.
- Only press **Void Request** if you never intend to fill the request on the selected line.

 After pressing the blue button to mark the items as sent, the available quantity will be lowered in your inventory for those items. When they are actually received by the other location, your quantity on hand will be lowered as well.

Receive Requested Items

After you have received your inventory from another location, follow these steps to complete the transfer:

- From **Inventory Entry**, press the **Transfers** button
- Navigate to the **Receive Requested Items** tab.
- To receive all the items marked as sent, press **Receive All Sent** and press **Process All Changes**.
- Otherwise, select each item that was received, and for each item:
 - Verify or adjust the **Quantity to Receive** in the bottom left corner.
 - Click **Update Item**.
- If you make a mistake, simply enter a different quantity and click **Update Item** again. Or click **Set All to Zero** to start over. Nothing is actually received until you press the blue button.

Physical Inventory

Navigation: From the Main Menu press the **Inventory Entry** button and then press the **Physical Inv.** Button located at the top of the window.

Here you will enter the **Physical Inventory Session**. Here you can update your inventory in bulk. Enter the date that you counted the inventory press the **Start New Session** button located at the bottom of the **Physical Inventory Session** window.

- Before counting your inventory, it is useful to print either the **Physical Inventory** report or the **Bin Count Sheet**, so that you can write the actual quantities on the printed report.
- Select the Bin you would like to start with, using the drop down box. Choose items that have no bins attached to them by selecting the *blank* option.
- In the **Qty** column, enter the Quantity that you have counted for the item.
- You can use the yellow [Search Boxes](#), and/or select a single Item Group by using the **Find Group** button.
- When you have completed your inventory count and updated the quantities, first press **Print Report**, then press the **Close Session, Updating Inventory** button.
- A warning will appear asking you if you are sure.
- You can choose the date you would like to post the adjustments to
- You can choose to put Catalog Cost, Last Cost or Average Cost in the Inventory History records.
- You can also leave any notes in the notes section.
- If you have the General Ledger module, it is recommended that you check the box to **Post to the General Ledger**.
- Press the **Close Session** button. A window will appear confirming that it is done, along with the number of adjustments that have been made, and the Batch #. You can find this batch in the [Purchase Order](#) window.

Inventory Details Tab

Navigation: From the Main Menu select the **Inventory Entry** button and select the **Details** Tab.

The following information applies to the parts and labor types of the inventory.

Within the **Details** tab, you can set costs prices for your parts and labor. Other things that can be customized in this tab are as follows:

Next Linked item

Press the ... to select an item to link to this item in your inventory, so that every time this item is entered into a workorder the other item is added on the next line. For example, if you have a tire package set as the **Next Linked Item** for your new tires, you will be able to enter a tire into a workorder and quickly have all labor, fees, warranties etc. added as well.

Item Group

Every inventory item (with the exception of packages and comments) must be assigned an **Item Group**. This serves two main purposes:

- It lets you see sales summaries on the [Daily Report](#). For example, say you have 30 different oil filter inventory items and you assign them all to a group called *Oil Filters*. The Daily Report will show you how many oil filters you sold that day, month, year and previous month. It will also show you what you sold them for, the profit margin and the profit amount.
- The Item Groups also tell AutoFluent how to post your sales and purchases to the General Ledger. Each [Item Group is assigned one or three accounts](#) from your accounting software, When the **Daily Report** is posted, the sales and purchases will post to these accounts in your accounting software.

For more information on creating item groups, click [HERE](#).

Bolt Pattern (customizable)

Optionally, you can enter an item's bolt pattern here. If you prefer, you can change the name of this field to something more useful to you. This is done in the [Inventory tab](#) of **System Settings**.

Code

You can assign a code to particular part, and through the **Inventory Search** you can search for all items with that code.

Mfr / Mfr

Here you can enter the Manufacture name as well as the manufacturer part number. These are optional items that can be entered for reporting purposes. In the **Inventory Search** window, you can search by manufacturer.

Rep / Mech Commision

If you would like this to be an item that your sales reps or mechanics can receive a commission on, check the boxes. To setup commissions Click [HERE](#).

Available / On hand / On Order

If the inventory item is a stocked part you will see these numbers change automatically as Sales, Adjustments, Transfers and Purchase Orders are made.

Vendor Part

Part number for main vendor, if it is different from the Catalog Number. This number will appear on [Purchase Orders](#).

Vendor

Here you can enter your main vendor for a particular part.

Unit Weight

Optionally you can enter the weight of the item, to appear on your **Purchase Orders**, and optionally on your invoices.

No Disc

Check this box to disallow discounts or price changes in the workorder window.

Obsolete

Checking this box will make is so that this item will NOT appear in the [Inventory Search](#) window, unless the Obsolete option is selected in that window. it is preferable to mark an item Obsolete than to delete the item outright, because the history for the item is still preserved for your records.

Inventory Email Tab

Navigation: From the Main Menu select the **Inventory Entry** button and select the **Email Tab**

Emails can only be setup for labor and comment lines. For example, you can set it up so that every time an invoice is created that has an alignment, an email reminder will be put into the queue to be sent to the customer in 6 months. However, the customer will *not* get an email if:

- The customer has no email address
- The customer's **Mail Postcards** checkbox is not checked. This is found in the [Sales Tab](#) of the **Customer Entry** window.
- The number of months on the **Email** tab is zero; the number must at least be 1.

For more information about setting up emails [Click HERE](#)

Inventory History Tab

Navigation: From the Main Menu click **Inventory Entry** then select the **History** Tab.

The history tab allows you to see the entire history for this item. By looking in the Type column you can tell what type of transaction has taken place. Transfers will be labelled *Xfer*, Invoices are *Sale*, and Purchase Orders are *P/O*. This tab is also available in the **Inventory Search** window.

To preview an invoice, select the invoice and press the **Preview Invoice** button.

Inventory Postcards Tab

Navigation: From the Main Menu select **Inventory Entry**, then select a labor or comment Item and click the **Notes/Postcards** Tab.

For labor items and comments, on the **Postcards** tab of the **Inventory Entry** window you can specify a postcard to be sent automatically to the customers whenever this item appears on an invoice. For example, if you set up a postcard on your alignment item, and set it for 6 months, a postcard will be sent to every customer 6 months after they get an alignment done.

What You Will Need to Print Postcards

At your local office supply store, buy **Avery #8387** blank postcards, or something comparable. These are simply 8 ½" x 11" cardstock, with perforations to tear the sheet into four postcards. Then select **Postcards** in the [Customer Report](#) menu. That's it! When you close the report window, you will be asked if they printed correctly. If they did, press the button to delete the postcards so they don't get reprinted next time. Postcards are typically printed monthly. You will be pleased at the extra revenue they generate!

Setting up Postcards

- Select a labor or comment item, and select the **Notes / Postcards** Tab.
- Enter the message to appear on the postcard. If you want to use special colors and fonts, click the **Use Special Editor** button to bring up an editor very similar to *WordPad*. To change the color or font of your text, simply swipe across it. Then use the drop-down menus to change the font name and size, and use the other icons to change the color and properties of the text. When you are done with your changes, close the editor window, and answer yes to keep your changes.
- Click the **Change Graphic on Postcard** button and select one of the several pictures to be printed on your postcard.
- At the bottom of the window, select the number of months to wait before sending this postcard. It must be more than 0, unless this is the **New Customer** postcard or the **Customer Reminder** postcard (see below.)
- Press the **Save Changes** button at the top of the window to save the postcard.

After the postcard has been setup, whenever this item appears on the invoice of a customer, a postcard will be generated to be printed after the specified number of months have gone by. However, the customer will *not* get a postcard if:

- The customer has no mailing address.

- The customers **Mail Postcards** checkbox is not checked. This is found in the [Sales Tab](#) of the Customer Entry window.
- The number of months on the postcard is zero. The number must at least be one.

Reminder Postcards

You can set up a Reminder postcard, so you can go to a specific Customer and send them a custom reminder message. The postcard just needs to be set up once, and when it is used it can be quickly customized to your needs.

- Create a comment item with a catalog number of *REMINDER*, or something similar.
- Set up the postcard as above, with the words *SPECIAL REMINDER!* in the text, and a generic picture.
- You may leave the number of months at zero, because it will be ignored.
- Save the postcard.
- In the **System Settings** window of the **Setup Entry** menu, select the [Sales Settings](#) Tab.
- Click the ... button on the line titled **Reminder Postcard**, and select the comment item you just created.
- Save your changes.

Now, say you want to remind a Customer to get his transmission checked in 10 weeks. Using the Reminder postcard feature, this can be set up in one of two ways:

- In the [Customer Entry](#) window select the Customer and click the **Reminder Postcard** button.
- While finalizing an invoice, click the **Send Postcard** button in the [Payment](#) window.

In either case, you can change the text or picture as desired, and set a date. After the specified date, the Customer will receive the Special Reminder

New Customer Postcards

If you would like to setup a New Customer postcard, all new customers will automatically receive a postcard after their first visit. Follow these steps:

- Create a comment item with a catalog number of NewCustomer, or something similar.
- Set up postcards as above, with a thank you note or a discount coupon, whatever you would like to communicate to your new customer.
- You may leave the number of months at Zero, because it will be ignored.

- Save the postcard
- In the **System Settings** window of the **Setup Entry** menu, select the [Sales Settings](#) Tab.
- Click the ... button on the line titled **New Cust Postcard**, and select the comment item you just created.
- Save your changes.

Now every new customer will receive a postcard with your message.

Inventory Sales Tab

Navigation: From the Main Menu select the **Inventory Entry** button and select the **Sales** Tab

This tab pertains to parts and labor items

Spiffs

Spiffs are ways for your employees to make a small bonus off of the sale of a particular item. You can enter a dollar amount or a percentage of the spiff in the **Type** and **\$/%** boxes. You can also make this a temporary spiff by checking the box that says **Temporary?** and setting the From and To date ranges using the drop boxes.

 Spiffs can be changed for items fitting certain criteria in the [Price Changes](#) window.

Temporary Discounts

To setup temporary discounts check the **Enable Temporary Discounts** box and manually change the price in the Discounted column (You can see what the regular price is in the Regular column to help you determine how much you would like to discount the item by.)

 Temporary Discounts can be changed for items fitting certain criteria in the [Price Changes](#) window.

Last Sold/Last Received etc.

These dates are managed by the system and cannot be changed manually, they are just there to give you a quick glance of the last time the item was sold, received, ordered and last modified.

Service Data/Alldata Keywords

Enter keywords to assist Alldata in finding parts.

UPC Code

If you are using a barcode scanner you can scan the UPC code into this field. Print labels with the print labels button.

Inventory Vendors Tab

Navigation: From the Main Menu select the **Inventory Entry** button and select the **Vendors** tab

Here, you can assign vendors to your inventory parts, and also manage alternate part numbers.

Adding an Alternate Part Number

- Press the **New** button
- Leave the **INVENTORY ADJUSTMENTS** as the vendor.
- Enter the alternate part number. The numbers below are ignored.
- Click **Save Changes** and enter as many alternate parts as desired for this item.
- Now, in the Inventory Search window, you will be able click the **Alternates** button to search for these part numbers.

To Add a New Vendor

- Press the **New** button
- You can enter the part number and other details for this part on the right hand side of this window.
- Click inside of the **Vendor** box and you will be taken to your vendor list
- Select your desired **Vendor** and press the **Save Changes** button

Inventory Web Tab

Navigation: From the Main Menu select the **Inventory Entry** button and select the **Web** Tab.

If you have a wholesale website you may add photos and other information for your part in this area. Using the Main Image box you may choose a file that will show up as the main photo for a part. You may add up to 6 alternate images.

On the right hand side, you will find boxes for Size, Tread Width, Aspect Ratio etc. These are optional items, meant to help you make your website more informative.

BinsTab

Inventory Entry

The Inventory Entry and Inventory Search windows now have a new Bins tab. In both of these windows, there is a grid with a list of bins with qtys, and a grid with bin activity history.

Above the bin grid is a place to enter a bin number with an* Add* button. Clicking the button will add the Bin number entered to the list below. You can enter any bin number, using letters and numbers. If the bin number does not exist, it will be created. Clicking the button with 3 dots* [...] *will let you choose a bin from among those which have been used with other items at this store.

Other functions available in the Inventory Entry window only:

- You can select which bin is the main or default bin for this item by clicking in the first column of the grid, to the left of the bin number. This will move the asterisk to that bin.
- **Delete Selected Bin** to disassociate this bin with the selected item. This does not affect the bin's history, or its association with other items.
- **Edit Bins** button to bring up the Adjust Bin Locations window. This window appears whenever you update a bin quantity (in a Workorder, Invoice, purchase order, adjustment and transfer.) In this window, you can: Move items between bins & move unassigned items to one or more bins.
- **Assign Remaining** to move all the items in the Unassigned Box to the selected bin. If no bin is selected, they will be moved to the top bin in the list.
- **Assign None** to move all the items in the selected bin to the Unassigned Box.
- **Unassign All Bins** to move all the items in all the bins to the Unassigned Box.
- **Rename / Merge Bins** to change the name of a bin. This will change it for all items, at this store only.



Note that you cannot use the plus / minus buttons to move a quantity to the negative, and you should not enter negative quantities. Additionally, these are quantities on hand, and not available.

Tracking Bins With Quantities

To turn on this feature navigate to Setup Entry then open the System Settings and select the Inventory/POs tab. Check the box found on the Track Quantities at Bin Locations box. Save and restart.

Inventory Entry

The Inventory Entry and Inventory Search windows now have a new Bins tab. In both of these windows, there is a grid with a list of bins with qtys, and a grid with bin activity history.

Above the bin grid is a place to enter a bin number with an * Add* button. Clicking the button will add the Bin number entered to the list below. You can enter any bin number, using letters and numbers. If the bin number does not exist, it will be created. Clicking the button with 3 dots* [...] *will let you choose a bin from among those which have been used with other items at this store.

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- **Assign None** to move all the items in the selected bin to the Unassigned Box.
- **Unassign All Bins** to move all the items in all the bins to the Unassigned Box.
- **Rename / Merge Bins** to change the name of a bin. This will change it for all items, at this store only.



Note that you cannot use the plus / minus buttons to move a quantity to the negative, and you should not enter negative quantities. Additionally, these are quantities on hand, and not available.

Sales and Bins

- You can adjust the bins from a sales transaction in two places:
- From Sales Entry, you can select a W/O or Invoice and click the Bins button at the bottom of the window.
- When previewing a Workorder or Invoice, you can click the Bins button at the top of the preview window. In either place, the Bins button will bring up the Assign Items to Bins window where they can decide which bins to use. See below for a description of that window.

If they do not click the Bins button before it is invoiced, the system will assume the default bin is used. If there are not enough in that bin to fill the order, it will pull the items from other bins assigned to that item. If there is still not enough inventory in all the bins assigned to that item, the rest of the items will remain unassigned to any bins. Bin quantities are never automatically put into the negative. You are allowed to change the bin allocation on transactions after they have been invoiced, because this does not affect the actual inventory on hand or available. It only tells the system where the items were. Changing an invoice will modify the bin history record.

Purchase Orders

After selecting a Purchase Order in the P/O window, click the * Bins* button. This will bring up the Assign Items to Bins window (described in a section below), where you can see a list of all the items that are either received or previously received in the P/O. If an item exists multiple times in the P/O, it will only appear once in this list, with a combined total quantity.

If you hit the Bins button after receiving items but before processing your changes, the items will be allocated to the default bin, and you can change bins if desired. This will create a bin history record, even though the item has not yet been received.

When hitting Process All Changes after receiving inventory, the inventory will be received into the default bins as long as a bin exists for the items. You can then hit the Bins button at a later time to change which items go to which bins. Doing this will update the bin history records.

In the Purchase Order window, bins are handled exactly the same way whether you are making a normal Purchase Order, or using the '* INVENTORY ADJUSTMENTS *' vendor.

Adjustments

In the Adjustments window, whenever you post the adjustment with the orange button, the Adjust Bin Locations window appears, letting you decide which bins to use. See the section below describing this window.

Inventory Transfers

In the Fill Transfer Requests tab of the Transfer window:

When you click the* Print Packing Slip & Mark as Sent* button, the Assign Items to Bins window appears so you can tell the system which bins you are pulling the inventory from.

Before pressing the button to **mark as sent**, you can click the **Bins** button to tell the system which bins will be used. This will bring up the same Assign Items to Bins window.

When items are sent:

- the quantity available gets updated,
- the quantity on hand does not get updated,
- bin history records are created of type 'Xfer', but the bin quantity on hand does not get updated.

In the Receive Requested Items tab of the Transfer window:

When you click the **Process All Changes** button, the _Assign Items to Bins _window appears so you can tell the system which bins the inventory is going into.

Before pressing the* Process your Changes* button, you can click the **Bins** button to tell the system which bins will be used. This will bring up the same Assign Items to Bins window.

When items are received:

- The quantity available and quantity on hand are updated.
- The bin quantity on hand is updated.
- Bin history records are created of type 'Xfer In'.
- At the other store, the inventory quantity on hand is updated.
- At the other store, the bin quantity on hand is updated.
- At the other store, the 'Xfer' records are changed to type 'XferOut'

Bin Reports

The Bin Count Sheet lets you print a range of bins, and it lets you specify whether you want to print the quantities in each bin.

The Bin Labels report lets you print labels for all, or a range of bins pertaining to the current store. This is so that you can scan the bin number (in the Adjust Bin Locations window) while you're receiving or selling inventory to tell where the items are.

The Bin Report lists your inventory, along with each bin associated with the items.

Next to each bin number is the quantity on hand in parenthesis.

The 'QOH' column shows the total quantity on hand for that item.

The 'No Bin' column tells how many items are not allocated to any bin.

Assign Items to Bins Window

This window comes up whenever a *Bins *button is pressed, and whenever a P/O or Transfer is finalized. It is used for assigning bins in:

- Sales Entry
- Previewing Invoices
- Purchase Orders
- Transfers – both sending and receiving

If an item appears on the invoice, P/O or Transfer more than once, it will only appear once on this grid. For example, if an item appears on a W/O once with a quantity of 2 and again with a quantity of 4, it will appear once in this grid with a quantity of 6.

If the item has a bin, that bin will be used.

If the item has more than one bin, the system will assign a bin or bins to this item, according to these rules:

If we are receiving the item (as in a purchase order or a sale return), only the default bin will be used.

If we are sending items out, it will assign as many bins as needed (beginning with the default bin) to reach the quantity specified on the line.

It will never assign a bin that has no quantity.

If there is not enough in a bin or bins, it will assign all it can and leave the rest unassigned. It will never take the bin quantity below zero.

Clicking on a line will open the Adjust Bin Locations window, the same one that is used in Inventory Entry when clicking the Edit Bins button.

When processing changes in P/O's and Transfers, this window pops up automatically for you to approve. If the automatic allocations are correct, nothing needs to be done, and the window can just be closed.

This window does not appear automatically when finalizing an invoice. To make sure that the correct bins have been used, you should click the Bins button at the top of the Invoice Preview window.

Adjust Bin Locations Window

In this window you can:

- See how the transaction was applied to the bins.
- Choose different bins to use for the transactions by clicking the + and – buttons.

- Move unassigned items to one or more bins. For example if your qty on hand is 10, and 3 have been assigned to bins, there will be a 7 in the Unassigned Box below the grid, which you will be able to move to bins.

Assign Remaining to move all the items in the Unassigned Box to the selected bin. If no bin is selected, they will be moved to the top bin in the list.

Assign None to move all the items in the selected bin to the Unassigned Box.

Unassign All Bins to move all the items in all the bins to the Unassigned Box.

Rename / Merge Bins to change the name of a bin. This will change it for all items, at this store only.



Note that these are quantities on hand, and not available.



You should not enter negative quantities.

Inventory Reports

Navigation: From the Main Menu press the **Inventory Reports** button.

Barcode Report

This report will generate your inventory with the barcodes you have associated with them. If an item does not have a barcode, the catalog number will become the barcode.

Bin Count Sheet

This report includes the catalog numbers of your items, the bin they are associated with and their description as well as an area for you to write in the actual count. There is a page for each bin number, and if an item is associated with multiple bin number, it will appear on the report multiple times. Unlike the Physical Inventory report, the current quantity does not appear on the report, to encourage accuracy.

Bin Report

This report includes information about your inventory items and which bins they are currently associated with.

Excess Inventory Report

This report only includes stockable items with more in stock than the Reorder Quantity recommends. It gives you the total value of this excess inventory.

Inventory Movement Report

This report is to give you an idea of how well items are selling in relationship to their quantity on hand.

Inventory Package Report

This report simply lists all the setup information of all your inventory packages. There are no parameters for this report.

Inventory Sales Report

This report displays what was sold, how many, total sales, total profit and total purchases. This information is displayed in Month to Date and Period to Date format, where you can specify any period. It then compares this with the current quantity and value on hand, and shows your current reorder level. This is perhaps the best report for deciding how to **adjust your reorder levels**. It is recommended that this report

be run at the end of the month just before closing the month, to keep a record of how well each item is selling.

Inventory Sales Report with YTD

This report is similar to the **Sales Report** above, but instead of showing the current value, it includes year to date totals.

Inventory Sales Transactions

This report is also similar to to the **Sales Report**, but rather than giving you one line per item, each sale, sale return, purchase and transfer is listed.

Inventory Value Report

This report will display the Total Cost and FET as well as the unit count of your inventory.

Model Inventory Report

Reports what the inventory value would be if your inventory on hand exactly matched your Reorder Levels.

Outside Parts Waiting

This report lists all of the outside parts on your open workorders. You can sort this report by Workorder # or by Vendor name.

Price List – Customizable

This report lists the various prices and FET, and if the **Show Cost?** checkbox is checked, it also shows the Average Cost and Total Cost. At the bottom of the window, there is a **Customize** button, which will let you choose exactly which columns you want to print on the report. You can choose among any of the price levels (including the [special computed prices](#)), any of the costs, FET, your quantity on hand and your quantity available.

Reorder Report

This report only lists those items whose quantity on hand is less than the reorder quantity. It then suggests how many to order based on the reorder quantity, your quantity available, and the quantity on other purchase orders.

After generating the report, there is a button at the top that allows you to create a Purchase Order containing the items in the report. If you press this [Create Purchase Order](#) button, you will be asked for the

Vendor, and other information pertaining to the P/O before it is created. The P/O can then be printed, faxed, or emailed to your supplier.

Special Price List

This report lets you choose among any of the 12 regular or unlimited custom price levels. You can even customize the title. There are two main purposes of this report:

- Print a custom price list to give your customers.
- Look at profit margin or markup of your various price levels.

Transaction Report

This report lists all the detailed history of your inventory for any time period. You can choose to view any combination of sales, purchase orders, transfers, or even claims, along with the transaction number and the customer or vendor involved.

Transactions by Vendor Report

This report lists the detailed history of purchase orders, adjustments and transfers, listed by vendor, for any time period, with totals per vendor..

Variance Report

This report is made to be used in conjunction with doing a [Physical Inventory Count](#), so you can compare your counted inventory with the inventory in the system, before you finalize your session and update your inventory.

Customer Entry

Navigation: from Main Menu select the **Customer Entry** button.

In this window you can create new customers without having to go through the workorder process. You can make changes to customer payments, adjustments, Vehicles, etc.

More:

[Creating or Deleting Customers](#)

[Address Tab](#)

[Sales Tab](#)

[Terms Tab](#)

[Contacts Tab](#)

[Shipping Address Tab](#)

[Vehicles Tab](#)

[Notes Tab](#)

[Workorder Message tab](#)

[History Tab](#)

[Customer Payments](#)

[Customer Adjustments](#)

[Refund Customer Deposit](#)

[Email](#)

Creating, Deleting and Recovering Customers

Navigation: from Main Menu select the **Customer Entry** button.

To Find a Customer

Begin by entering the customer's name in the yellow search boxes. To do a new search, press the **Clear** button. If you have a list of Customers greater than 100, only the first 100 Customers matching the criteria in the yellow boxes will be on the list. You can press the **Show All** button to read them all in (though it might take a minute).

* Note: If you are using our Multi-store version and would like to sort between stores, first enable the Store column by selecting the Settings button and checking the **Store** box and clicking **Done**. A new column will appear with the customer's home store displayed. You can press the word *Store* to sort by stores or you can click inside of the yellow box, to select a particular location.

Adding a Customer

To create a new customer, simply press the **New** button. Fill out the customer's information in the tab named **Address**, such as First Name, Company, Address etc. You can also choose which store will be the customers main store by scrolling through the stores in the default box. When all of the information you will need is entered into this **Address** tab, you may select **Save Changes** at the top of the window.

Deleting a Customer

- Customers with balances cannot be deleted until the balances are cleared out by making an [Adjustment](#).
- Search for the customer using the yellow search boxes and select the customer.
- Select the **Delete** button at the top of the window.

* It is preferable to make the customer inactive rather than deleting the customer so that the sales history will remain intact for reporting purposes.

Recovering a Deleted Customer

If you accidentally delete a customer, it is possible to restore the customer with their history. You will need an invoice number from a previous purchase.

- Navigate to **Sales Entry**”“:#sales-entry
- Mouse over the yellow **Search** box and select **Invoice #**.
- Enter the Invoice number and AutoFluent will prompt that the customer has been deleted.
- Follow the prompts to restore.

Address Tab

Navigation: From the Main Menu click **Customer Entry**. The address tab will be the default selected tab.

When a workorder is created, all of the customer's information that was input will be added to this **Address** tab. This eliminates the need to re-enter it again. However, you may find the address tab useful when notified of a customer change.

Details

- **First Name:** Clicking this button will move the name from the Company Name to the First and Last Name.
- **Last Name:** The last name of the Customer.
- **Company:** The full name of the Customer's Company. Pressing the **Company** button will move the name from the First Name and the Last Name to the Company Name. If the customer has a Company Name, it is preferable to leave the First Name and the Last Name blank.
- **Address:** One or two lines of street or P.O. Box address information.
- **City/State/P.Code:** City, State and Zip/ Postal Code of the Customer. Addresses are required for printing postcards and statements
- **Contact:** The main person to contact if it is a company. If there are additional people, use the **Contacts** Tab.
- **Email:** This space is required for emailing invoices and creating customer email lists.
- **Send Email Button:** Allows you to generate a new email to send to this customer on the fly. From this window, enter the subject and the body, just as if you were sending a personal email. You may even choose to use plain text or HTML by checking either box at the top. You can also select when the email should be sent or you can choose to **Send Now**. You can also do the following:
 - **Select a Template:** Brings up a [Mail Templates](#) window so you can select a template to use.
 - **Reminder Email:** Uses the template defined for Reminder Emails. [This is set up here.](#)
- **Main Store:** If you have multiple locations and are using the Multi-store Version of AutoFluent, each customer will be assigned to a store. That store can be changed here.
- **Active Box:** Uncheck this box if you do not want to let this customer appear on search lists when invoicing. This is preferable to deleting the customer, because the sales history will remain intact for reporting purposes.
- **Phone Numbers:** In order to search by phone number, the phone number must be in any of these forms:
 - 916-555-2433
 - 916.555.2433
 - 555-2433

- 555.2433
- 916-555-2345 Cell
- 916.555.2345 Work
- **Reminder Postcard Button:** Pressing this button will allow you to generate a special reminder postcard for this customer to be sent after a certain date. A basic reminder postcard should first be created in the **Inventory Entry** window, and that will be used as the template for all reminders.

Sales Tab

Navigation: From the Main Menu press the **Customer Entry** button and navigate to the **Sales** Tab.

PO # Required

If this is checked, any workorder for this Customer cannot be invoiced without first entering a **Customer Order #** for that Workorder.

Pay FET

If this Customer pays Federal Excise Tax, leave this checked. Some government agencies are exempt from this tax.

Accept No Checks

If this box is checked, the customer will not be allowed to use a check to pay an invoice at the point of sale.

Mail Postcards/Emails

If this is not checked, no [Postcard](#) or [Email](#) will ever be automatically generated for this customer. This will also keep the customer from going to the lists of our 3rd Party CRM Providers like DemandForce and CustomerLink, if you choose to use them.

No Automatic Supplies

If you have enabled the setting for Shop Supplies to automatically be added to all workorders you can check this box to make this customer an exception to that setting, and no automatic shop supplies will be added to their workorders.

Parts/Labor Discount %

Every time a new workorder is generated for this customer, all parts and/or labor items will be discounted by the percentage that you have entered here, unless the sales rep manually changes it in the workorder.

Deposit

This shows how much the customer has paid on a deposit that has not yet been applied to an invoice.

Resale

This is the state Tax ID number for customers who are not charged sales tax. If the [System Settings](#) require it, the customer cannot be invoiced without paying sales tax unless they have a Tax ID.

Resale # Date

Optionally, you can specify the date of the resale number.

Sales Category

Sales Categories are setup in the [Sales Category](#) window of the **Setup Entry** menu. Each Customer must be assigned a Sales Category. In the Sales Categories section of the [Daily Report](#), sales and profit are broken down per Sales Category for the day and the month. For Example, you could monitor your sales by retail, wholesale, government and dealers.

Tax Type

Select the tax rate for this customer. Sales Tax Rates are set up in the [Sales Tax Rates](#) section of the **Setup Entry** window. If the System settings require it, you must enter a **Resale #** (see above) if the tax rate is zero.

Sales Rep

If this customer normally works with a particular Sales Rep you can assign the representative here. When a new workorder is created, the rep will appear in the top right hand corner of the workorder window, and if the rep is set up for [commission](#) he will get commission from the sales, as long as the items are marked as commissionable.

Price Level

You can change that customer's price level here. The default price level for new customers depends on their **Sales Category**, and is set [here](#).

Referred By

You can monitor how well your various advertising methods are doing with the referred by column. In this field you can select or update the way a customer was referred to you. You can also require that this is set for all new customers created in a workorder. This setting is in the [W/O tab of System Settings](#).

Sales Statistics

The remaining information on the Sales tab is for your reference only and cannot be changed.

Terms Tab

Navigation: From the Main Menu click **Customer Entry** then select the **Terms** tab.

This is the area where you can set default payment and credit terms for a specific customer.

Terms

Terms are setup in the [Terms](#) tab window of the setup entry menu. You can set the **Default Terms** to be one thing (usually *Net 30*) when the customer is created here in **Customer Entry**, and another thing (usually *Cash*) when the customer is created while creating a workorder. These are set up in the [Sales Settings](#) tab of **System Settings**.

Credit Limit

Here you set the credit limit for the customer. Even if the customer is setup as cash terms, if they have a credit limit the sales rep can change the customers terms to Charge on Account. By the same token, customers who are set up with a terms like *Net 30* cannot charge past their credit limit without a [Credit Manager's](#) approval. How far over a customer can charge without a credit manager's approval is defined [here](#).

Ship Via

This drop down allows you to select the preferred method for shipping to this customer. These are defined [here](#).

Finance Charges

If this box is unchecked, when Finance Charges are generated for printing statements, this Customer will never get charged a finance fee.

Print Statement:

Uncheck this box if you would not like statements printed for this customer.

Bad Debt

To mark this customer's balance as bad debt check this box. Then you will have the option of not including them in your Aging Reports.

Never Re-age

If this box is checked the customer can never be re-aged to update their balance.

Current/Over 30/etc

These numbers show how much the customer owes in each ageing category. To adjust them, use the [Adjustments](#) window.

National Account

If this box is checked, customer invoices and workorders will optionally print with no dollar amount.

National Account Vendor

The Vendor that this customer purchases through.

Client Login for your website

If you have a website, you will want to set up the login information for your customer here. Enter the email account, password as well as the Web Price Level for the customer.

Contacts Tab

Navigation: From the Main Menu click **Customer Entry** then select the **Customer Contacts** tab

In this tab you can enter extra contacts for the selected customer.

To Create a New Contact

- Press the **New** button.
- Enter the name and phone numbers of the contact.
- Press **Save Changes**.

To Delete a Contact

- Select the contact
- Press the **Delete** button



Note: Contacts can be edited at will simply by typing over the information in any particular field. After editing, before closing the window or moving on to another tab or customer be sure to press the **Save Changes** button located at the top of the **Customer Entry** window.

Shipping Address Tab

Navigation: From the Main Menu click **Customer Entry** then select the **Ship Address** tab

Here you may specify alternate shipping addresses for the customer. When in a workorder, pressing the **Ship To** button and then the **Select New Address** button will allow you to select one of the alternative addresses. New addresses can also be added and deleted while in the workorder.

Create a New Shipping Address

- Press the **New** button.
- Enter the Name and Address.
- Press **Save Changes**.

To Delete the currently selected address, press the **Delete** button.



Note: Addresses can be edited by simply typing over the information, after editing and before closing the window or moving to another tab or customer be sure to press the Save Changes button.

Vehicles Tab

Navigation: From the Main Menu click **Customer Entry** then select the **Vehicles** tab.

In this area you can review, add, change or delete vehicles for this Customer.

You can get to the same screen in the Invoicing window by pressing the Vehicle button.

[Click here for the **Vehicle Window**.](#)

Vehicles

Navigation: This window appears when you:

- Press the **Vehicle** button in an open workorder.
- Press the **Vehicle** Tab in the **Customer Entry** window.

This window serves several purposes:

- You can select a vehicle for the current workorder.
- You can add, delete or edit vehicles.
- You can decode the License Plate or VIN number with CARFAX.
- You can use the model guide to get more detailed information about the vehicle.
- You can review and reprint invoices and workorders pertaining to the selected vehicle.
- You can review the Service History using the **CARFAX Service History** button.

Creating or Vehicle

- Press the **New** button at the top of the vehicles window.
- Enter the License plate number and press the **Decode VIN** button or the small **C** button to have the Year, Make & Model, and other information automatically filled out.
- The year, make, model, ect. can also be entered manually without using the Carfax system.
- Other information can be entered under the Vehicle Specifications and Tire & Wheel Information boxes. This information can also be entered automatically by using the Model Guide.
- Select the **Save Changes** button.

Selecting a Vehicle

- Highlight the desired vehicle from the vehicle list
- If you are accessing this window from a workorder press the **Select** button at the top of the window. If you came to this window from the **Customer Entry** window, there will be no **Save & Select** button.



Note: It is recommended to use the Model Guide or Carfax from the Vehicles Window instead of entering the vehicle information manually, because these automatically link the engine, tire and wheel information for the specific model, for use in the Parts & Labor Guides, and the Tire Fitment Guide.

Notes Tab

Navigation: From the Main Menu click **Customer Entry**, then select the **Notes** tab.

This is an area where you can put an unlimited amount of notes concerning the customer. For instance, you can keep a log of all credit issues. When the window fills up, it will scroll down, allowing you to enter more information. This information is also available (but not editable) when you click **Cust Info** in the [workorder](#).

After making changes, press the **Save Changes** button.

Workorder Message Tab

Navigation: From the Main Menu click **Customer Entry** then select the **W/O Msg** tab

Any message entered here will appear in a pop-up window when a workorder or quote is created or edited for this customer in the **Sales Entry** window. Typical uses include:

- Warning messages of various kinds.
- Reminders regarding the customer.

You can also have this workorder message appear whenever the customer is being invoiced by checking the box that says, *Also show this message when finalizing an invoice.*

History Tab

Navigation: From the Main Menu click **Customer Entry** then select the **History** Tab.

The history tab shows the entire history for a customer, including workorders, invoices, payments, finance charges, appointments etc. For multi-store customers you can also see at what store the transaction for a customer took place and can sort by store by using the yellow store box column.

Preview

This button will allow you to preview and/or print the selected transaction.

Void Payment

Press this to void the currently selected payment. If the day has not been posted, the payment will be deleted. If the day has already been posted, a negative payment will be created to cancel the selected one out.

Show All

Unless this checkbox is selected, only the first 100 transactions will be shown.

Customer Payments

Navigation: From the Main Menu select **Customer Entry**, then press the **Payments** button.

* Note: In the Multistore version of AutoFluent, you can do this while logged in at any store location, and apply a payment to transactions made at multiple stores.

Payment Tutorials

Applying a Payment Using Auto Apply

- Select the customer from the list using the yellow search boxes.
- Enter the amount of the payment received inside the **Pmt Received** box.
- Press the **Auto Apply** button. The payment will be applied to all the transactions that it can, oldest ones first. If there are any open credits to be applied this button will apply them as well. If the terms in those invoices applies also denote a discount for early payment, the applicable discount will appear in the Discount column.
- Press the **Process Payment** button, enter the payment method and press **Done** to finish the transaction.

Applying a Payment Manually

- Select the customer.
- Enter the amount of the payment under **Pmt Received**.
- Select the invoice you would like to apply the payment to.
- Click in the **To Apply** column, and an arrow button will appear.
 - Press the drop down arrow to apply the whole amount to this invoice.
 - Press it again to apply an applicable discount.
 - Press it again to unapply the line, removing the amount.
 - Optionally, you can type in a specific amount to apply.
- Continue clicking on other transaction lines to apply them as desired.
- Note that you do not have to apply the entire payment amount to transactions, or any of it, for that matter. If you do not apply it all, you will get a warning, and the customer will be left with an unapplied credit.
- Press **Process Payment**
- Enter the payment method and press **Done** to finish the transaction.

* Note: If you have received an amount that you want to apply to multiple specific invoices you can use the method above until the To Be Applied box has reached zero.

* Note: If you pressed the Auto Apply button but it did not apply to the invoices you wanted them to you could select the Clear Applied button to start over.

Applying an Unapplied Credit

An Unapplied Credit is a transaction with a negative open amount. This can be from a negative invoice or adjustment, or from a payment that did not get fully applied to other transactions. Old unapplied credits will continue to print on statements until they are applied, so it is a good idea to apply them to other transactions. This is the simplest way to apply an unapplied credit:

- Select the customer.
- Press the Auto Apply button. If there are any unapplied credits, they will automatically apply themselves to other transactions, oldest first.
- Press Process Payment. You will be asked if you are sure you want to save a Zero Payment. Answer Yes. The credit will be applied.

Applying Specific Credits or Negated Invoices

Say for example you had invoice #1 for \$1000 then you did a negate of that invoice. You will see in the payments screen one invoice for \$1000 and another for (\$1000). The latter invoice is an Unapplied Credit because it has a negative open amount. In order to apply the (\$1000) to the \$1000, and not to other open transactions, do the following:

- Select the customer.
- Select the transaction with the credit from the list of transactions. In our example, it would be (\$1000).
- Click inside of the to apply column for this invoice, and then click the arrow that appears. Notice that the -\$1000 gets added to the to be applied box next to the Process Payments button.
- Now, select the original invoice exp. the invoice with the \$1000. Click in the to apply column and press the arrow again. You will see the \$1000 credit from the to be applied area gets added to this invoices to apply column and the open amount changes to zero.
- Press the Process Payment button you will see a warning that this is a Zero Payment that is fine since this is a case where a negate is involved. Press OK. A receipt will appear for you to print for your records.

- Now both the original invoice and the negated invoice are gone from the payments window, and will not appear on statements in future months.

Other Details

Auto Apply

After selecting a Customer and entering an amount received, this button will apply the payment to the transactions, oldest first.

Clear

This option will clear the search bars

Clear Applied

This will unmark all transactions, zeroing out the To Apply and the Discount columns so you can start over.

Customers with Balances

Uncheck this box if you want to see all Customers. For example, a Customer could have a zero balance, but still have a credit that needs to be applied to transactions

Open Transactions Only

Select **Open** to see only the transactions that have not been applied or paid off yet.

Preview

This button lets you review and/or reprint an Invoice or payment.

Process Payment

After applying your payment or credit, press this button. If a payment was received, click the button of the appropriate payment method. Press the **Done** button to finish the transaction.

Reage this Customer

Use this button after using **System Maintenance** (see below) to refresh the balance.

Show All

Unless this is checked, only the first 100 Customers will be displayed. Use this in conjunction with the Show Customers with Balances checkbox to review all Customers with balances (it may take a while to find them all.)

System Maintenance

This will give you the option to manually change the actual open amount of the transactions. Normally, it should never be used.

Customer Adjustments

Navigation: From the Main Menu click **Customer Entry**. Then press the green **Adjustments** button.

With this feature, you can quickly and easily make adjustments to the accounts of your charge customers. This is used when you need to change the balance of a customer without either selling anything to them or having a sale returned. The most common use of this is writing off a bad debt.

- Start by Searching for the customer that you wish to make the adjustment to using the yellow search boxes and then selecting the customer.
- Press the **New** button and then enter the amount of the adjustment.
- Enter the Description, Date, Rep and Terms.
- If you have the accounting module you can also select a General Ledger account.
- Select the **Save** button, and a receipt will appear with the amount that has been charged or credited to the account
- To give a credit, simply use a negative amount, like *-40*. The following receipt will say *"Your account has been Credited \$40"*.



Note: If the customer had already been selected in the Customer Entry window, that customer will be selected in this window.

Adjustment Details

Amount

Enter the amount of the adjustment here. Enter negative numbers as credits to lower their balance, or positive numbers as charges to increase their balance due.

Date

You may backdate the adjustment to reflect past transactions.

Description

Enter the reason for the adjustment. Keep in mind that the message will appear on the statement

G/L Account

Where the transaction will be posted to in the General Ledger, if applicable.

New

After selecting a Customer, press this button to start a new adjustment. This will automatically enter in the current date.

Preview

Lets you see the specifics on the Invoice and allows you to print them by pressing the Printer icon at the top of the preview screen.

Re-Age This Customer

After selecting a Customer, press this button to recompute the ageing based on today's date. Normally, Customers are aged continually, and re-aged at the end of the month when the ageing report is run, so this button is typically not needed

Rep

The name of the person creating the adjustment.

Save

After entering a description amount and verifying the date, press this button to save the new adjustment.

Show All or Open Transactions Only

For the selected Customer, you can see all transactions, or just the open (unpaid) ones.

Customers with Balances

Check this box to only view Customers that have balances. Retrieving the Customers may take a while if the **Show All** box is checked.

Terms:

This is the terms of the adjustment, and is normally Net 30.

Refund Customer Deposit

Navigation: From the Main Menu click **Customer Entry**. Then press the green **Refund Deposit** button. (This button will only be clickable if the customer has a deposit available).

Once the **Refund Deposit** button is selected, a window will appear that is very similar to the [Invoice Payment](#) window. You will select the method at which you would like to return the deposit (Cash, credit etc.) and you will enter a reason for the refund in the box.

Press the **Done** button and a receipt will be available to print.

Email

Navigation: From the Main Menu click **Customer Entry** select the **Email** button.

AutoFluent has within it a powerful emailing system. Not only can you email invoices, workorders and quotes and schedule reminder emails, but you can also use AutoFluent's [Create a Mailing](#) system to create email lists based on customer vehicles, last purchases and much more! This can be a useful tool that brings in customers for targeted specials. Emailing must be setup in the **Email** tab of **System Settings**.

More:

[Create a Mailing](#)

[Pending Mail Tab](#)

[Mail Templates](#)

Create a Mailing

Navigation: From the Main Menu click **Customer Entry**, and select the green **Email** button. Then select **Create a Mailing**.

With the **Create a Mailing**, feature you can send emails out to many customers in bulk. You can tell them about upcoming specials, a move to a new location, or whatever you like. You can target customers in several different ways.

Create Mailing by Customer

With this tab, you can create a mailing list for customers based on their personal data. You can choose a [Sales Category](#), so you could target specific groups such as wholesale or commercial customers. You can narrow down your target list based on when the customer last made a purchase, or how much they have spent. Fill out all appropriate fields to your liking and press the **Create Preview List** button.

You will see a list of customers that meet your set criteria. From here, you can craft a brand new email or you can use a [Template](#).

You can select to send this email on a specific date by pressing the **Send on Date Specified** button, or you can send immediately with the **Send Now** button.

Create a mailing by Purchases

You can create a mailing for customers based on their purchases in the past. You can narrow it down range of dates, catalog numbers, sales category, and even type of vehicle. Customize this however you would like, and press the **Create a Preview List** button.

You will see a list of customers that meet your set criteria. From here you can craft a brand new email or you can use a [Template](#), if you see a customer who you do not want to send this promotion to, (such as a generic cash customer) simply uncheck the **Send** checkbox in the right column.

You can select to send this email on a specific date by pressing the **Send on Date Specified** button, or you can send immediately with the **Send Now** button.

Pending Mail Tab

Navigation: From the **Customer Entry** select the green **Email** button and select the **Pending Mail** tab.

From the **Pending Mail** tab, you will find a list of customers who have their reminder emails due to be sent. You will want to check this tab every week, and click the button to send emails due to be sent. Some larger shops do this daily as part of their end of day routine, along with running their **Daily Report**.

- You can choose to send the emails that are due by pressing the **Send All Emails Due To Be Sent** button.
- If you would like to send *all* emails on this list at once (including those that are not due yet), you can select the **Send ALL Emails** button.

Details

New Button

Lets you Create a new email to be sent

Delete Button

Deletes the currently selected email so it does not get mailed.

Save Changes Button

Saves all of the modifications you have made on the currently selected Email.

Copy

Copies the currently selected Email.

Address

The Email Address of the receiver.

Send On

This is the date at which the email is supposed to be sent.

Send Today

Changes the **Send On** date to the current one.

Subject

What will be displayed as the subject of the email.

Text and HTML Buttons

If your email contains HTML language in it select HTML. If it is a plain text email select text.

Message

This is what will be displayed as the content of the email.

Send ALL emails Due to be Sent

Sends all of the emails that have a send date of today or earlier.

Send All Emails

Sends all of the pending Emails, even those that are not due to be sent.

Delete All Emails to be Sent Before:

All emails that were created before the selected date will be deleted in bulk.

Mail Templates

Navigation: From the **Customer Entry** window, select the green **Email** button and select the **Mail Templates** tab.

The **Mail Templates** screen will display all of your email templates. It also allows you to create new ones or modify the existing ones.

Creating a New Template

- Select the **New** button and enter a description for the template, for example: *Oil Change Special*
- Change the Subject of the email.
- Enter the message in either plain text or by using HTML
- Save changes to save the current template

Using the Merge Fields

You can have the system pull the customer's information when the email is generated. For example, the body of your email could read:

«firstname»,

Thank you for bringing in your «model». We appreciate your business. Take 20% off y our next Oil Change.

If this template is used as an email reminder sent to John Smith with a Toyota, the email would read as follows:

John,

Thank you for bringing in your Toyota. We appreciate your business, Take 20% off your next Oil Change.

Customer Reports

Navigation: From the Main Menu press the **Customer Reports** button.

Aging Report

This report summarizes the Customers that owe you money and tells you how old or new their balances are. When running it, you have the option of re-ageing the Customers first, which re-computes their balances. You should check this box and re-age the Customers at least once a month, before printing statements.

Aging Transaction Report

This report lists all Customer with open (unapplied) charges and credits, along with their open transactions. The transactions are listed in their appropriate ageing columns (Current, 30 days, etc.) This is a useful report to print and fax to Customers with questions about their bill.

Bank Deposit Analysis

This reports summaries your cash receipts from your Daily Reports for a specified time period for a specified time period

Comprehensive Sales Report

This report is dependent on your Daily Report sales and breaks down the following information:

- Parts sales and profit
- Labor sales and profit
- Tire Sales and Profit
- The number of invoices and the average invoice amount
- Your sales goals and how close you are to these goals.



Note: If you have multiple locations this report will break your sales down per location and consolidate them.

Comprehensive Group Report

This report will break the periods down into up to 8 customizable categories. Each category can represent either an Item Group or any combination of groups. For example, one column could be Brake Parts another could be Filters. It is dependent on your Daily Report sales and breaks down the following information:

- Parts sales and profit
- Labor sales and profit
- Tire Sales and Profit
- The number of invoices and the average invoice amount
- Your sales goals and how close you are to these goals.

Customer Labels

This will print mail labels for Customers in a specified range. You can select a specific sales category if desired.

Customer Labels by Purchases

This report will print mail labels for customers based on their purchases for example you may choose to print labels for customers who only have a particular vehicle. This can be helpful if you are doing targeted specials. You can also specify the home store locations for these customers as well as a host of other criteria.

Customer List

This will print a list of Customers in the specified range, including their month-to-date purchases and their deposits on the books. It should be run at the end of the month before running the Customer Month-End, which clears the month-to-date sales. You also have an option of only listing Customers with deposits on the books.

Customer List by Purchases

This report will print a list of customers based on their purchases for example you may choose to see a list of only customers who have purchases recently. This can be helpful if you are doing targeted specials. You can also specify the home store locations for these customers as well as a host of other criteria.

Customer Notes

This report will print a list of customers who have notes or a workorder message associated with their account.

Note: If you have multiple locations you may specify from which store you would like to generate this report for.

Customer Sales Report

This lists your Customers, along with pertinent sales information. You can see at a glance how much your Customers have purchased this month and year, as well as total purchases to date. It is recommended that you print this report at the end of the month, using the checkbox to only print the Customers who purchased this month.

Franchise Fees

This report will show gross sales minus tax for each of your locations.

Invoice Profit Detail

This report will generate a detailed report with information regarding Parts, Labor and profit totals.

Item Group by Sales Category

This valuable managerial report lets you track sales and profit for any time period, for each type of inventory item and each type of Customer.

An Item Group summary, similar to the one on the [Daily Report](#), is printed for each [Sales Category](#), or type of Customer.

Select a time period by selecting a range of Daily Reports. The longer the period, the longer the report will take to generate, so if you want to report on several months you may want to wait until a time when others are not using the system.

Pick List Report

This report will display information on Bin location, catalog number, quantity, description and report totals for these items. If you have multiple store locations, you may specify which store you'd like to run the report for or you can choose all stores.

Postcards

This will print the postcards that have been created. Postcards are created in these ways:

- If a [New Customer Postcard is set up](#), a postcard will be created for all new Customers.

- If labor or comment items are set up in inventory with postcards, whenever those items are invoiced, a postcard is created that will print on or after the specified date.
- From the **Customer Entry** window, the **Reminder Postcard** button will create a custom postcard for the selected Customer.
- When finalizing an invoice, on the Payment window there is a **Send Reminder Postcard** button.

Except for the **New Customer** postcards, all postcards have a date that they should be printed. When printing postcards, you would normally leave the date at today's date and print them. You could enter a later date to preview postcards that are to be printed in the future.

After the postcards are printed and the report window is closed, you will be asked to delete the postcards. If they printed correctly, press the **Delete These Postcards** button so they will not be reprinted in the future.

Referral Activity Report

This useful report is to help you optimize your advertising dollars by giving you an idea about which methods are working and which methods are not.

Sales Tax Report

This report is to give you the information you need for your state or province reports.

Statements

With this report, you print statements to send to your Customers. Before printing Statements, you should run an Ageing report and Re-age the Customers. There are several parameters to this report:

- **Statement Date** – The date to appear on the statement.
- **Date Range** – Include transactions in this date range, whether they have been paid or not. All unpaid or unapplied transactions will always appear on the report if **Open Item** is selected.
- **Include Customers with Credit Balances?** – Unless you check this, no statements will print for Customers that you owe money to.
- **Exclude Customers with Activity but no Balance?** – Unless you check this, Customers who did business with you or made payments will get a statement, even if their balance is zero.
- **Customer** – Click the ... button to select a single Customer to print. Either press the button to select a single Customer to print, or leave it blank (or press the **Clear** button) to print for all Customers.
- **Statement Message** – This will print on all statements. It could be something like *Happy Holidays!*
- **Finance Charges** – If you want to generate finance charges for this statement period, verify that the date and description are what you want, and press the **Generate New Finance Charges** button.

Finance charges will be generated according to the rules specified in the [Statement / Fin Chg Tab of the System Settings](#) window.

- **Delete Unposted Finance Charges** – If you do not like how the finance charges turned out, you can press the **Delete All Unposted Finance Charges** button, as long as you do it before posting the Daily Report. All finance changes generated since last printing a Daily Report will be deleted.
- **Printing Statements** – Press the **Print Statements** button and the statements will be printed to the screen. If they look good, make sure there is plenty of white paper in the printer and press the Printer icon.

✿ **Note:** If you have multiple store locations you have two choices when dealing with customer statements. Normally, statements are consolidated, and if a customer purchases at multiple locations, each store's transactions will appear on that customer's statement. However, if you check the box in the **Statements / Fin Chgs** tab of System Settings that says *Age each store separately rather than consolidating statements?*, the statements will be printed per store. In that case, if a customer purchases from more than one store, they would get a separate statement from each store, listing that store's transactions.

Transaction & Transaction Detail Report

These versatile reports list any combination of various types of transactions. The **Transaction Detail report** will also print the detail lines of the Invoices, Quotes and Workorders.

Transaction Summary

This report will generate a summary of your profit, parts, labor, misc, discount, FET, Sales tax and transaction totals.

Transaction by Date or Vehicle

This report is similar to the Transaction Report described above, except that it is optimized for printing transactions in a range of dates or for a single vehicle.

Therefore, this is the report of choice when printing all open Workorders, all Voids, all open Credits, or all transactions within a date range.

Transaction by Date or Vehicle with Detail

This report is similar to the **Transactions by Date or Vehicle** report described above, but it also shows the detail lines on each Workorder and Invoice.

Reprint Invoices

With this report you may print either all open invoices or selected invoices.

Create Email Mailing

Here you can send a mass mailing to Customers with Email addresses who fit specified criteria. You will first need to setup emailing in the [Email/Postcards tab of the System Settings](#). For more information regarding emailing visit the [Email](#) section in the **Customer Entry** window.

Vendor Entry

Navigation: From the Main Menu, select **Vendor Entry** button.

Within the Vendor Entry you will be able to create, and edit your parts vendors.

Creating a New Vendor

To create a new Vendor, press the **New** button. Enter the Company name, address etc.

You may also change the terms for this vendor. By default the terms are the same as the default **Charge Customer Terms**, and are set [here](#).

If you would like to use this vendor for outside parts purchases check the radio box at the bottom of this window. If you have some vendors selected for outside parts, and others not selected, only those vendors will be available for Outside Parts, and other places. For most shops we recommend either checking **Use for Outside Part Purchases** either all or none of the time so all vendors will show up in the appropriate areas.

Deleting a Vendor

Search for the vendor using the yellow search boxes, select the vendor and press the **Delete** button.

Vendor Bills

Navigation: From the Main Menu select the **Vendor Entry** button and press the **Bills** button.

In this window you can do the following:

- Create a new bill for a vendor.
- Review the existing bills for each vendor
- Delete bills that have been created. If the day has been posted through the Daily Report, then the vendor bill will not be deleted. Instead, an offsetting bill with opposite amounts will be created.

Creating a Vendor Bill

Select the vendor from the list.

1. First, fill in a Reference Number and/or Notes for this bill, so it can be identified in the future.
2. Then Press the New Line button, or press the Enter key.
3. Then select an asset or expense account to post the bill to. For instance, it could be an Inventory Parts asset account, or a Freight expense account. A good practice is to type in the first few letters of the account, and then use the arrow keys to select the account.
4. Then press the *Tab* key and enter an amount to post to the selected account, and press the **Save Line Changes** button (or press the *Enter* key.)
5. Continue to press the **New Line** button or the *Enter* key to add lines as needed.
6. Finally, verify the terms, the dates and the bill total, and press the **Save** button.

Details:

Reference: This should be something descriptive, and is usually the number from the Vendor's bill.

Notes: This is an optional space for additional notes about the bill.

New Line: Press this button to add a line containing an amount to post and an expense account.

Delete Line: After selecting a line below, press this button to delete it from the bill.

Edit Line: Here is where you can edit details of a line.

Terms: Here, you select the terms for this bill. If you don't change it, it will be the terms that were assigned to that Vendor in the [Vendor Entry](#) window.

Bill Date: The date the bill is to be posted to the General Ledger.

Due: The date that the bill will be due. This is automatically set when the terms are selected, but it can be changed here.

% Discount: If the selected terms allow a discount for paying the bill early, it will appear here. It can be changed if needed.

Expense Account: This is an asset or expense account to post the bill to. For instance, it could be an Inventory Parts asset account, or a Freight expense account. A good practice is to type in the first few letters of the account, and then use the arrow keys to select the account, and then use the arrow keys to select the account.

Amount: The amount to be applied to the account specified above.

Normally Use this Account for this vendor? If this is checked then whatever is on **Expense Act** line will be the default account for this Vendor for future Bills.

Save: Save Changes.

Cancel: Cancels what had been done.

Save Bill: Press this button when all the lines have been entered for the bill, and after verifying the terms, the dates and the bill total.

New Core: Add a new Core to the bill.

Bill Total: The total of the bill.

Batches of Vendor Bills

Navigation: From the Main Menu select the **Vendor Entry** button and press the **Bills** button. Then press **Batches**.

If you deal with a large number of Bills on a regular basis, this window can help you manage and reconcile them in batches.

Entering a New Batch

Before entering a batch of bills, enter the **Batches** window and press the button on top to **Close Batch & Create a New One**. This will assume the previous batch has been reconciled, and add a new batch to the list in the top grid. Then close the window, and enter the bills normally in the [Bills](#) window or while invoicing.

Reconciling a Batch

After the batch of Bills has been entered:

- Return to this window with the **Batches** button.
- Select the batch in the top grid. (The most recent batch will automatically be selected, but you can review / reconcile previous batches, and any unposted bills can still be edited.)
- Review the list of bills in the middle grid.
- If any changes need to be made, they can be made in the bottom section if the bill has not been posted yet.
- As changes are made, the batch total will be updated accordingly.

Posting Bills

Bills can be edited until they are posted. To keep a bill from being posted:

- Uncheck the **Ready to Post** checkbox on the Bill. This can be done:
 - In the **Batches** window.
 - In the **Bills** window.
 - In the **Workorder** when in the **Outside Part** window.
 - There is a system setting [Here](#) that can be set if you normally want bills created in the workorder to be on hold (with the **Ready to Post** unchecked.)

- Click the button on the line of the bill that says **Ready**, to change it to **Hold**. This is exactly the same as unchecking the **Ready to Post** checkbox. It can be done:
 - In the **Batches** window.
 - In the **Bills** window.
- Don't post the day. Although **Daily Reports** should be posted daily, it is the posting of the day which marks all bills as posted which are ready to post.

Vendor Purchase Orders

Please refer to [Purchase Orders](#).

Vendor Payments

Navigation: From the Main Menu select the **Vendor Entry** button and press the **Payments** button.

 **Note:** The Vendor Payments window is NOT available if you have the QuickBooks integration, and you have chosen to pay your bills in QuickBooks.

In this window, you apply payments to **Vendor Bills**. You can:

- Mark all bills due by a certain date to be paid for a selected Vendor.
- Mark all bills due by a certain date to be paid for all Vendors at once.
- Pay the selected bills for a given Vendor using a manual check.
- Pay all the selected bills for all Vendors, and print the checks on pre-printed forms.

Automatically Marking bills for the Selected Vendor

- Select the vendor from the list.
- The open bills for the selected vendor will appear in the bottom half of the window. The **To Pay** and **Discounts** columns show what amounts had previously been selected to pay.
- If you select a date, only the bills due on or before this date will automatically be selected.
- Press the **Auto Select** button.
- The bills due on or before the selected date will now have amounts in the **To Pay** column.
- If the terms in those bills also denote a discount for early payment, the applicable discount will appear in the discount column.
- If no bills were selected, try a date further in the future and press the Auto Select button again.

Manually Marking bills for a Selected Vendor

- First select the vendor by entering the first part of the company name in the yellow search boxes.
- The Open bills for the selected vendor will appear in the bottom half of the window.
- Select or deselect the bills to be paid:
 - Click in the **To Pay** column on the line of the desired Bill. A button with a triangle will appear where you clicked.
 - Click the button to mark the bill to be paid.
 - Click the button again to unmark it.

- If there was a discount computed, clicking the **To Pay** column will also turn On or Off that discount.
- You can also enter a specific amount to pay in the **To Pay** column, and a specific discount in the **Discount** column.

Paying Bills for a Selected Vendor

After a Vendor has been selected, and bills have been selected to pay for that Vendor, you can write a **Manual Check** to the vendor by following these steps:

- Verify that the check amount is the Total to Pay amount in the center of the window. If it is not, use the methods above to change the amounts in the To Pay column.
- Enter the **Manual Check #** and the **Manual Check Date**.
- Press the **Process Manual Check** button. You will be warned if the check number has already been used.
- The check will appear in the check register, and will be posted to the vendor and the General Ledger (if applicable).

Making All Bills Due to All Vendors at Once

To mark all bills to be paid that are due by a certain date, simply enter the date in the top left corner of the window, and press the button called **Auto Select All Vendors**. You will be told what the total amount of the check run will be. To see the list of bills and payments, you can run the **Vendor Check Preparation** report. When you do, check the box labeled **Include Only Those Marked to Pay**.

Printing Checks for All Vendors

After marking the bills for all the vendors, making any needed changes using the methods above, and printing the **Vendor Check Preparation** report to verify the totals, you are ready to press the button labeled **Print Vendor Checks**.



You can order checks from our partner [ComputerForms.biz](https://www.computerforms.biz) here. If you order them elsewhere, ask for **Quickbooks Voucher Checks**.

After you close the report window, you will be asked if they printed correctly on the printer. If you answer yes, the checks will be posted to the vendors, the checkbook and the General Ledger.

Claims and Cores

Navigation: From the Main Menu select the **Vendor Entry** button and press the **Claims/Cores** button.

Entering a Core into a Workorder

- On the workorder line with the outside part which has a core associated with it, Click the blue **P**.
- Fill out all of the regular information like Vendor, reference number etc.
- After entering the reference number, Enter the core price in that same window, and press the OK button.
- When the workorder is finalized (Invoiced), the core will be added the **Claims/Core** window.

Entering a Claim into a Workorder

- On the workorder line with the stocked or outside part of the claim return, click the **P** or **T** button.
- Check the **Claim** checkbox.
- When the workorder is finalized (Invoiced), the claim will be added the **Claims/Core** window.

Shipping Claim/Core

- Enter the **Vendor Entry** & select the **Claims / Cores** button
- Check the box in the first column of the item or items to be shipped.
- Select the **Ship** button and answer yes when the dialog box appears.
- A **Packing List** will be available to print. If the list looks correct answer yes.
- Notice that the status of the item(s) has now changed to *Returned*.

Taking a Credit

- Select Claims or Cores that you would like to apply credit to by checking the check boxes as above.
- Select the **Credit** button & fill out the appropriate information about the vendor's Credit Memo on the dialog window.
- Press the **Create Credit** button and answer yes in the next window.
- Notice that the status on the cores/claims box has changed to *Credited*.

Finding the Credit

- Enter the **Vendor Entry** and select the **Vendor Bills** button.
- Select the vendor.
- You will find the Core or Claim credit amount in the list.

Checkbook

Navigation: From the Main Menu, select **Vendor Entry**. Then click the orange **Checkbook** button.

The Checkbook window lets you enter checks, deposits, fees and interest, and lets you reconcile with your bank statement.

The Checkbook is set up by selecting [Bank Accounts](#) from the **Setup Entry** menu. (See the section on [Bank Accounts](#) for instructions on how to do this.) When setting up the account in the **Bank Accounts** window, you specify the date of the last reconciled bank statement, and you enter the beginning and ending balances of that bank statement.

In the **Checkbook** window, the Beginning Bank Balance in the bottom left reflects the last bank statement's ending balance. The transaction list in the center shows all transactions that have not yet been reconciled. (If you want to see ALL transactions, check the box called **Show Reconciled**.)

Checkbook – Details

Delete/Void Line Button

This button will delete or void the selected transaction in the list.

View Checks (Changes to Reconcile)

This button will let you see the detail of the selected transaction. When you press it, its name changes to Reconcile because pressing it again returns you to Reconcile mode.

Reconcile (Changes to View Checks)

This button takes you back to Reconcile mode, where the bottom third of the window has the information and buttons needed for reconciling.

Show Reconciled

Check this box if you want to see all transactions, including those which have been reconciled in previous months.

More:

[Reconciling your Bank Statement](#)

[**New Check Button**](#)

[**New Deposit Button**](#)

[**New Daily Deposit Button**](#)

[**New Fee Button**](#)

[**New Interest Button**](#)

[**New Payroll Button**](#)

New Check

Navigation: From the Main Menu, select **Vendor Entry**. Then click the orange **Checkbook** button, and then the **Check** button.

Checks created in the [Vendor Payment](#) window or the [Paid-Out](#) window will automatically appear on the list of checks. If there are more checks to enter, use the **Check** button to create new ones.

New Check – Details

Select a Vendor

You may optionally press the **Select a Vendor** button to pick one of the Vendors on file, so that this check will appear in that Vendor's history.

Description

If you pressed the **Select a Vendor** button, the Vendor name will appear here. Otherwise, just enter the description of what the check is for.

Check

The Check # will automatically be set to one higher than the highest check number in the list. Change it if necessary.

Date

Select the date the check was written, and is to be posted to your accounting software.

New Line

Click **New Line** to specify what this check gets applied to. When you do, you will be asked for an account and an amount. Click **Save Line Changes** when done.

If there is more than one account to apply the check to (i.e., if it was for both parts and tires), continue using the **New Line** button to add new lines as needed.

Account

Use the mouse to scroll down and select an account, or you could use the keyboard for speed.

To use the keyboard, start typing the name of the account. For instance, if the check is to be applied to Inventory:Parts, enter *INV*, then press the down arrow a few of times to find the account. Then press the *Tab* key, enter the amount and press the *Enter* key.

Amount

Enter the dollar amount to apply to the account specified above.

Save Line Changes

After selecting the account entering the amount, press this button.

Cancel New Line

Press this to abandon changes on the new line you are entering.

Delete Line

Press this to delete the selected line below.

Cancel

Click this to abandon the new check completely.

Save Check

Click this to save the new check, posting it to the Checkbook, the Vendor and General Ledger.

More:

[Checkbook Window](#)

[Reconciling your Bank Statement](#)

[New Deposit Button](#)

[New Daily Deposit Button](#)

[New Fee Button](#)

[New Interest Button](#)

[New Payroll Button](#)

New Daily Deposit

Navigation: From the Main Menu, select **Vendor Entry**. Then click the orange **Checkbook** button, then the **Dep Adj** button.

Daily sales are posted to the checkbook automatically as Daily Deposits, and they will appear on this list. If there are more deposits to enter, use the **Deposit** button or the **Dep Adj** to create new ones. The difference is that Deposits are posted to your accounting software and Daily Deposits are not.

New Daily Deposit – Details

Description

Enter the description of where the Deposit came from.

Date

Select the date of the Deposit.

Amount

Enter the dollar amount of the Deposit.

Cancel

Click this to abandon the new Deposit completely.

Save Transaction

Click this to save the new Deposit, posting it to the Checkbook.

More:

[Checkbook Window](#)

[Reconciling your Bank Statement](#)

[New Check Button](#)

[New Deposit Button](#)

[New Fee Button](#)

[**New Interest Button**](#)

[**New Payroll Button**](#)

New Deposit

Navigation: From the Main Menu, select **Vendor Entry**. Then click the orange **Checkbook** button, and then the **Deposit** button.

Daily sales are posted to the checkbook automatically as **Daily Deposits**, and they will appear on this list. If there are more deposits to enter, use the **Deposit** button or the **Daily Deposit** button to create new ones. The difference is that Deposits are posted to your accounting software and Daily Deposits are not.

New Deposit – Details

Description

Enter the description of where the Deposit came from.

Date

Select the date of the Deposit. It will be posted to your accounting software with this date.

New Line

Click **New Line** to specify what this deposit gets applied to. When you do, you will be asked for an account and an amount. Click **Save Line Changes** when done.

If there is more than one account to apply the deposit to (i.e., a sales account and a sales tax account), continue using the **New Line** button to add new lines as needed.

Account

Use the mouse to scroll down and select an account, or you could use the keyboard for speed.

To use the keyboard, start typing the name of the account. For instance, if the check is to be applied to *Sales:Parts*, enter *SAL*, then press the down arrow a few of times to find the account. Then press the *Tab* key, enter the amount and press the *Enter* key.

Amount

Enter the dollar amount to apply to the account specified above.

Save Line Changes

After selecting the account entering the amount, press this button.

Cancel New Line

Press this to abandon changes on the new line you are entering.

Delete Line

Press this to delete the selected line below.

Cancel

Click this to abandon the new Deposit completely.

Save Deposit

Click this to save the new Deposit, posting it to the Checkbook and the General Ledger.

More:

[Checkbook Window](#)

[Reconciling your Bank Statement](#)

[New Check Button](#)

[New Daily Deposit Button](#)

[New Fee Button](#)

[New Interest Button](#)

[New Payroll Button](#)

New Fee

Navigation: From the Main Menu, select **Vendor Entry**. Then click the orange **Checkbook** button, and then the **Fee** button.

This button is to allow you to enter special fees charged by your bank. These fees get posted to your accounting software, using the account specified in the [General Ledger Setup](#) window, from the **Setup Entry** menu.

New Fee – Details

Description

Change the description of the fee, if needed.

Date

Select the date of the fee as it appears on your bank statement. It will be posted to your accounting software with this date.

Amount

Enter the dollar amount of the Fee.

Cancel

Click this to abandon the new Fee completely.

Save Transaction

Click this to save the new Fee, posting it to the Checkbook and the General Ledger.

More:

[Checkbook Window](#)

[Reconciling your Bank Statement](#)

[New Check Button](#)

[New Deposit Button](#)

[New Daily Deposit Button](#)

[**New Interest Button**](#)

[**New Payroll Button**](#)

New Interest

Navigation: From the Main Menu, select **Vendor Entry**. Then click the orange **Checkbook** button, and then the **Interest** button.

This button is to allow you to enter Interest accrued at your bank. This interest gets posted to your accounting software, using the account specified in the [General Ledger Setup](#) window, from the **Setup Entry** menu.

New Interest – Details

Description

Change the description of the Interest, if needed.

Date

Select the date of the Interest as it appears on your bank statement. It will be posted to your accounting software with this date.

Amount

Enter the dollar amount of the Interest.

Cancel

Click this to abandon the new Interest transaction completely.

Save Transaction

Click this to save the new Interest entry, posting it to the Checkbook and the General Ledger.

More:

[Checkbook Window](#)

[Reconciling your Bank Statement](#)

[New Check Button](#)

[New Deposit Button](#)

[New Daily Deposit Button](#)

[New Fee Button](#)

[New Payroll Button](#)

New Payroll Check

Navigation: From the Main Menu, select **Vendor Entry**. Then click the orange **Checkbook** button, and then the **Payroll** button.

This button is to allow you to enter employee paychecks. These do not get posted to your accounting software, because Payroll is done outside of **AutoFluent**. This feature is included to allow you to balance your checkbook if you write your paychecks from an account that you reconcile in **AutoFluent**. To create a **Payroll** entry:

- Select the employee.
- Change the description, if needed.
- Select the date of the paycheck.
- Enter the net amount of the check, and press the **Save Transaction** button.
- If you change your mind, press the **Cancel** button to leave without saving.

New Payroll Check – Details

Employee

First select the employee getting the payroll check from the drop-down list.

Description

Selecting an employee automatically fills this in. Change the description if needed.

Date

Select the date of the check.

Amount

Enter the dollar amount of the check.

Cancel

Click this to abandon the new check completely.

Save Transaction

Click this to save the new check, posting it to the Checkbook.

More:

[Checkbook Window](#)

[Reconciling your Bank Statement](#)

[New Check Button](#)

[New Deposit Button](#)

[New Daily Deposit Button](#)

[New Fee Button](#)

[New Interest Button](#)

Reconciling Your Bank Statement

Navigation: From the Main Menu, select **Vendor Entry**. Then click the orange **Checkbook** button.

Before reconciling:

- If the orange button in the center says *Reconcile*, press it.
- Make sure the **Show Reconciled** box is unchecked.

To reconcile your bank statement, find each transaction on your statement in the transaction list, and click the **Cleared** checkbox for every transaction that is found on the statement. To help you find the transaction, you have several options:

- You can type the amount in the yellow box above the **Amount** column
- You can type the first part of the description in the yellow box above the **Description** column.
- You can enter the check number above the **Check #** column

You can click the various column headings to resort the list. For instance, clicking on the Amount heading will sort the list by dollar amount. Remember that (\$1000.00) is a negative number and it comes before zero, and zero comes before \$1000.00.

When you mark all the necessary lines as **Cleared**, the *Ending Bank Balance* in the bottom left should reflect the ending bank balance on you bank statement.

If they do not, either you checked too many or too few, or a dollar amount did not match. If you need to enter more transactions, click one of the six **New** buttons (see below) and enter them. When the *Ending Bank Balance* matches:

- Enter the bank statement date bottom right
- Press the **Finish Reconciling** button.
- The cleared items will be reconciled, and balances will be adjusted.

Reconciling – Details

Mark All as Cleared

Click this to mark all of the transactions in the list as Cleared. If most of your items have cleared, press this button first, then uncheck the items that have not cleared.

Unmark All Cleared

Click this to uncheck all the boxes in the **Cleared** column.

Bank Statement Date

This is the period ending or closing date on the bank statement.

Finish Reconciling

When the Ending Bank Balance in the **Cleared** column in the bottom left matches the ending balance on your bank statement, enter the **Bank Statement Date** in the bottom right, and press this button. The cleared items will be reconciled, and balances will be adjusted.

Cleared Amounts Column

These amounts are totals that should match the totals on your bank statement. They represent activity in the current period, and are the totals of the items with a checkmark in the **Cleared** column. When the bottom number matches the ending bank balance on your statement, you are ready to press the **Finish Reconciling** button.

Not Cleared Amounts Column

This column represents transactions that have been entered into **AutoFluent** that have not yet appeared on your latest bank statements. They are totals of the items without a checkmark in the **Cleared** column.

Not Reconciled Column

These totals represent both **Cleared** and **Not Cleared** transactions. In other words, this column is a sum of the two columns to the left of it. If the **Show Reconciled** box is unchecked, these numbers represent the totals of all the items in the list.

More:

[Checkbook Window](#)

[New Check Button](#)

[New Deposit Button](#)

[New Daily Deposit Button](#)

[New Fee Button](#)

[New Interest Button](#)

[New Payroll Button](#)

Vendor Reports

Navigation: From the Main Menu press the **Vendor Reports** button.

Aging Report

This report summarizes the Vendors you owe money to and tells you how old or new their balances are. When running it, you have the option of re-ageing the Vendors first, re-computing their balances. You should check this box and re-age the Vendors at least once a month.

Aging Transaction Report

This report lists all vendors with open (unapplied) charges and credits, along with their open transactions. The transactions are listed in their appropriate ageing columns (Current, 30 days, etc.)

Check Preparation Report

After selecting Invoices to pay and before printing checks, run this report to review what is to be paid, and the total expenditure.

Check Register

This will list the checks and deposits in the Check Register.

Cores by Date

This report will display the cores you have as well as their dates, reference numbers, item descriptions, costs and statuses.

Cores by Vendor

This report will give you a similar result to the **Cores by Date** report, but it will break this information down by vendor.

FET Payable Report

This report will allow you to optionally choose a vendor and date range, and will generate information on total FET collected for the period.

Outside Parts by Date / Vendor

These two reports list the Outside Part transactions in the specified date range and range of Vendors. One is sorted by date and the other by Vendor. They are simply logs of what outside parts were sold and their cost and price, as specified by the sales rep.

Purchase Orders by P/O Number / Vendor

These two reports list the purchase orders in the specified date range and range of Vendors. One is sorted by P/O number and the other by Vendor. The lines of each P/O are included.

Vendor Paid-Outs

This report lists Vendor Paid-Outs, which are made when cash is taken from the cash drawer. Note that if a check number is used on a Paid-Out, the Paid-Out will appear in the Check Register report, and not in this one.

Vendor Summary

This report will allow you to choose a vendor and get a complete summary on the vendors' information, as well as purchases for the period and purchase totals to date.

Vendor Transaction Report

This report lists Vendor Bills and Payments.

Setup Entry

Navigation: From the main menu, click the gear icon on the top right corner.

AutoFluent software is designed with our customers in mind, within the system you can configure the settings to be as detailed or simple as you would like. It's all about what best suits your individual businesses needs. Each here refers to different aspects of customization.

[Setup System Settings](#)

[Setup Expenses](#)

Setup System Settings

Navigation: From the Setup Entry menu, select the **System Settings** button.

AutoFluent was created to work for you. There are hundreds of ways to customize it to your individual needs. Most of these can be made in the **System Settings** window. Below is the list of the various tabs on this window.



Note: Please be aware that any changes made in this window will require AutoFluent to restart in order for those changes to take effect.

More:

[Address](#)

[Company Logo](#)

[Credit Cards/Bank](#)

[Daily Report](#)

[Defaults- Miscellaneous](#)

[Defaults-Workorders](#)

[Disclaimer](#)

[Email/Postcards](#)

[Interfaces](#)

[Inventory/Purchase Orders](#)

[Invoice Copies](#)

[Parts & Labor Interfaces](#)

[Sales Settings](#)

[Statements/ Finance Charges](#)

[Vehicle Inspections](#)

[W/O Graphic](#)

Address

Navigation: From the Setup Entry menu, select the **System Settings** button. Then click the **Address** tab.

The City, State and Zip Code you enter here will appear on all new Customers and Vendors for this store until they are overridden. If you have multiple stores, this information may vary per location. You can enter up to three area codes to be used whenever you search for a 7 digit phone number by pressing the **Phone #** button in the **Search By** menu of **Sales Entry**.



Note: Internal company information (name and address) cannot be changed. Please contact AutoFluent support if any information is incorrect or has changed.

Company Logo

Navigation: From the Setup Entry menu, select the **System Settings** button. Then click the **Company Logo** tab.

Here you can select the logo that will appear on your workorders, invoices and statements.

To Use Your Own Logo

- Create a logo as either a .BMP or .JPG type file. Ideally, this file should not be more than 150kb or so. If it is not 80 × 180 pixels, you can check the **Resize to fit?** box.
- Navigate to the TABS AutoFluent folder usually located in your C drive, open the Reporting folder and copy the file into the Graphics folder.
- Open the Logo tab in AutoFluent and press the Change Graphic button. The logo you just added to the Graphics folder will appear in the list of files.
- Then press the Save button to save your changes.
- Restart AutoFluent to see your changes.

Credit Cards / Bank

Navigation: From the Setup Entry menu, select the **System Settings** button. Then click the **Credit Cards / Bank** tab.

Here you can setup the types credit cards that your customers use to pay with, and specify which checking accounts are used for what purpose.

- **Credit Card:** Enter a short name for the credit or debit card that your customers will use to make payments. You are allowed up to seven cards. VISA & M/C are usually combined to leave room for more cards in the future.
- **Credit Card Type:**
 - **Normal:** This is used for normal credit cards, where the money is deposited to the **Sales Bank Account** defined below.
 - **Delayed Payment:** If this credit card company pays you at the end of the month rather than every day or so follow this procedure:
 - Setup a customer in the customer entry window for the credit card company.
 - Set their terms appropriately and give them a sufficient credit limit.
 - Save changes
 - In the Credit Card window, press the '...' button to select the credit card company you just setup.
 - **Bank Account:** Direct the cards to a specific bank account. Bank accounts are defined [here](#).
 - **G/L Account:** If your AutoFluent is integrated with an accounting software you may direct each card to a specific G/L Account. A window will appear with all of your available accounts use the yellow search boxes to find the account you want. If you do not see the account you are looking for and you are sure it is in the chart of accounts of your accounting software try Refreshing accounts from the [General Ledger](#) window.
 - **G/L Account Only:** This is similar to the the **G/L Account** above, except that the money does not go into the Check Register.
 - **Any Customer / Vendor:** If this option is selected, whenever this payment type is used as point of sale, you will be prompted for a customer or vendor to apply the payment to. We usually call this 'card' **Special**, and that is how it will appear in the Payment window. For example, Let us say you are making an invoice for Mary Smith for \$150, and an warranty company will be covering \$100 of the bill, while Mary pays the other \$50 with cash.
 - Enter \$50 in the **Pay by Cash** box.
 - Press the **Special** button, and select the vendor (or customer) associated with the warranty company, ACME Supplies.

- The \$100 should now be in that row, and its button should say, ACME Supplies.
 - If you need to enter a reference number of some sort, enter it in the **Check #** box.
 - When you press done, you will see that the bottom of the invoice will report that it was paid with \$50 cash and \$100 ACME Supplies.
 - When you look at ACME Supplies, you will find a credit for \$100, with a reference to this Invoice number.
 - If ACME Supplies had been set up as a customer, that customer would have had a adjustment charge of \$100.
- **Fee%:** If your credit card company charges you a set fee percentage, you can enter it here. Then on the Banking Summary on the Daily Report the fee will be deducted from the deposit. The fee will also be deducted in your accounting software when the day is posted.
 - **Swipe:** This is used when integrated with the **Charge-It Pro** system. You may choose Credit Card, Debit Card or Gift Card.
 - **Active:** Check the Active box if you would like this card to become available when invoicing out a customer.
 - **Sales Bank Account:** After [setting up your Bank Accounts](#), enter the name of the bank account that you would like to deposit your daily sales to.
 - **Cash Deposit G/L Acct:** If you would like the cash deposit directed to a different General Ledger account in your accounting software, you may choose it here.
 - **Purchases Bank Account:** After setting up your [Bank Accounts](#), enter the name of the checking account that you pay your vendors with.
 - **Use ChargeitPro Credit/Debit Card Service?:** Check this box to use the **Charge-It Pro** Merchant Account Software.

Daily Report

Navigation: From the Setup Entry menu, select the **System Settings** button. Then click the **Daily Report** tab.

If there are parts of the Daily Report that you would rather not print every day, uncheck the corresponding lines in this tab.

 Note: When you go to print the Daily Report there is a similar list of checkboxes that you can check or uncheck as you would like per day.

Defaults – Miscellaneous

Navigation: From the Setup Entry menu, select the System Settings button. Then click the **Defaults – Miscellaneous** tab.

Here you will find a list of rules that can be set within the system. From choosing to never show other customers vehicles to making the outside price matrix linear, each box is easy to understand. Be sure to save all changes with the **Save** button located at the top of the window. Unlike other tabs, you do not need to exit AutoFluent to make the changes on this tab take effect.

Defaults – Workorders

Navigation: From the Setup Entry menu, select the **System Settings** button. Then click the **Defaults – Workorders** tab.

Here you will set rules within the system that have to do with your workorder screen. Read through each line and check the box for the rules you would like to set. You can accomplish things like requiring that a **Referred by** is selected for every new customer, or setting a rule to tax items after discounts have been applied. You do not need to exit AutoFluent for the changes on this tab to take effect.

Disclaimer

Navigation: From the Setup Entry menu, select the **System Settings** button. Then click the **Disclaimer** tab.

Here you will enter the **Disclaimer** message that appears on the bottom of workorders and invoices. If you would like one message to appear in the workorders and a different message to appear in the invoices, you may do so by entering a message for the invoice in the second box. If you would like the disclaimer to be the same, you only need to enter the message in the first box.

Email / Postcards

Navigation: From the Setup Entry menu, select the **System Settings** button. Then click the * Email / Postcards* tab.

Here you can setup the account that you will use to send your send emails and texts from, and you can choose what postcards to use for new customers and reminders. There are three Tabs on this tab:

Setup

- **Use Email?:** Check this box to activate the **Email** system, and use emails to contact customers
- **SMTP Host/Port:** This is the name and port number of your outgoing email server. If you do not know this information, you can contact your internet service provider to find it. If you are using a general email account like Gmail, the AutoFluent support staff may be able to find this information for you.
- **SMTP Username:** Enter your email address here.
- **SMTP Password:** Enter your email password here.
- **Email From Address:** This will be the email address that will show in the 'From' field of the email that customers receive.
- **Email Reply To address:** This is the address that customers's replies will be sent to.
- **Email Helo Host(optional):** Use only if specified by email service provider.
- **Template for new Customers:** Press the ... to design or select a template to be used for new customers.
- **Template for Reminder Emails:** Press the ... to design or select a template to be used for reminder emails.

Text Messages

Text messages can be sent to customers via the [Workorder Status](#) column of the **Sales Entry** screen. In this tab you can create default text messages when a customer's status is set to None, Appointment, Arrived, In Progress, On Hold or Completed. Normally, the Text Message feature will work through the email server set up in the **Setup** tab, as described above. If you would like to use a different email server, fill in the lower section of this tab and check the box that says *Use the following instead of the Email Server defined in the Setup tab.*

Text Messaging Addresses

Text messaging works by emailing the message to several phone company carriers. Messages sent to incorrect carriers are ignored, while the correct carrier will send the message to the desired cell phone. Although the default list should be fine in most cases, you can add or remove carriers here if desired.

Interfaces

Navigation: From the Setup Entry menu, select the **System Settings** button. Then click the **Interfaces** tab.

This tab is typically used by Technical Support staff when setting up our various parts and labor interfaces. If you would like help with one of these setups please give our support line a call.

[Click here for **Parts and Labor Setup**.](#)

Parts and Labor Interface Setup

Navigation: From the Main Menu, select the **Interfaces** tab of **System Settings**.

AutoFluent integrates with a host of different parts and labor guides making adding work and parts to your workorders seamless. Following are the systems that we integrate with, and the information needed for our technical support technicians to set them up.

Labor Guides

AutoFluent Service Data

Setting up our AutoFluent service Guide is as easy as contacting our office. Once we have activated it, you can click on the **AutoFluent Service Data** button in a workorder. A window will appear asking you to enter the vehicle information if it had not been entered already.

Alldata

We interface with the S3000 Online Version and the old DVD version. With the online version, you will need your user name and password.

Mitchell 1

We interface with the DVD version of Mitchell Estimator (not Mitchell Manager.)

Epicor/Activant

To interface with Epicor, you will need to fill out some forms, and Epicor will send you a disk. When it arrives, we can finish the installation.

Real-Time Labor Guide (disk version)

Estimate will be created in Real-Time Labor guide then can be imported into AutoFluent.

Parts Houses

You will need to following information available when setting up the interface to the following Parts Houses:

Napa ProLink

- TAMS Store ID (9 digits)
- TAMS Account ID (5-6 digits, usually starts with the letter 'D')

Nexpart

- Username
- Password

WorldPac

- SpeedDial program (Our support staff can install it.)
- Username
- Password

IAP

- Username
- Password
- Partner ID
- Seller ID
- Group ID

Carquest

- Username
- Password

ePart Connection

- Customer number
- Password

UPS WorldShip Interface Setup

Navigation: From the Main Menu, select the **Interfaces** tab of **System Settings**. Then select the **Other** tab.

This will let you export the selected addresses of today's sales to *UPS WorldShip*, so that you can more easily and accurately print your UPS labels. Here are the steps required to implement this interface.

AutoFluent WorldShip setup

- Go to the **Interfaces** tab of System Settings.
- Select the **Other** tab.
- Click the **Factory Default** button, and then the **Test** button.
 - The **Test** button verifies that the path is valid, and that you can create files in that location.
- Check the box to Use *UPS WorldShip*, if the large majority of your invoices are to be sent to *UPS WorldShip*. With this checked, the **Use UPS WorldShip** checkbox will be checked by default in the [Invoice Payment](#) window.
- (The **Setup WorldShip** button brings up this documentation.)
- Click the **Save** button to save your changes.
- Create at least one invoice, making sure the **Use UPS WorldShip** box is checked in the Payment window when invoicing.
- In the **Sales Entry** window, click the **WorldShip** button to export the names and addresses from those invoice(s) to a text file, to be imported into *WorldShip*.
 - If you answer *Yes* when asked if they got exported correctly, the addresses will be removed from the internal list of addresses to be sent, so they won't be included in the list the next time you export.
- Follow the steps in the next section to set up *UPS WorldShip*.

To Set up *UPS WorldShip* (only needs to be done the first time):

- Before setting up *WorldShip*, you must export at least one address from **AutoFluent**. (See above.)
- In *WorldShip*, Select the **Import-Export** tab on top.
- Click **Tools**, then **Import/Export Wizard**.
- Select *I need help with importing information into WorldShip* and click **Next**.
- Select **Addresses** and click **Next**.
- For the Data Connection Name, enter *AutoFluent Import*.
- Click **Browse**, and select *addresses.txt*, which should be in the *ProgramData\TABS AutoBiz* folder.
 - If you used a different folder in the *AutoFluent WorldShip* setup above, the file will be there instead.

- Click the **Configure Data** button.
- Check the box for *Column Name Header Rows to Scan*, and enter a *1*, for 1 row.
- In the **Format** drop-down, select *Tab Delimited*.
- Select *ANSI* and click **OK**.
- Click **Next**.
- Drag the word *CustomerID* in the left column to the top box labeled *Customer ID* (or *Customer*).
- Click the **Define Primary Key** button once.
- Drag each of the remaining words in the left column to the corresponding box in the second column. For example, drag *Company* to *Company or Name*. Do NOT click the **Define Primary Key** button again.
- Enter **Import AutoFluent** in the box labeled *Map Name*.
- Click the **Save Map** button.
- Select Exit to *WorldShip* and click **Finish**.

To Import your addresses from AutoFluent:

- In the **Sales Entry** window of **AutoFluent**, click the **WorldShip** button to export the names and addresses from those invoice(s) to a text file, to be imported into *WorldShip*.
 - If you answer *Yes* when asked if they got exported correctly, the addresses will be removed from the internal list of addresses to be sent, so they won't be included in the list the next time you export.
- In *WorldShip*, Select the *Import-Export* tab on top.
- Click the **Batch Import** button in the top left.
- Select *Import AutoFluent* from the list.
- Select *Overwrite existing records*.
- If desired you may check the box *Do not use postal code validation*.
- Normally, you would check the box to delete existing records, so you'd have a shorter list of addresses.
- Click **Next**, and click **Next** again.
- Examine the list of issues. It is normal to have some truncated (shortened) data.
- Click **Save** to finalize the import.

Inventory / Purchase Orders

Navigation: From the Setup Entry menu, select the **System Settings** button. Then click the **Inventory / Purchase Orders** tab.

Here you are setting rules for your inventory and purchase orders. You can set rules like *Don't allow deletion of items if there is a quantity on hand*, or disabling creating a Bill from a Purchase Order. It would be beneficial to read over each of these rules carefully to consider what would best work for you. At any time you can enable or disable these rules by pressing the **Save** button and restarting AutoFluent.

Automatic Shop Supplies

If you would like to automatically add Shop Supplies to all or most of your invoices, you can create a Shop Supplies item in [Inventory Entry](#), and use the drop down box here to select that item. Then every new workorder will have shop supplies added to it. If after setting this up, there is a workorder that does not require Shop Supplies, you can check a box in the lower left of the Workorder Entry window to disable Shop Supplies for that workorder.

Inventory Transfers

Press the **Inventory Transfers** button to define what happens when inventory Items are transferred between stores. Click [here](#) for details.

Inventory Transfers Setup

Navigation: From the Setup Entry menu, select the **System Settings** button. Then click the **Inventory / Purchase Orders** tab, and click the **Inventory Transfers** button.

There are three Modes, or ways that inventory transfers are processed in the system.

Mode 1 – G/L

This is the most common and simplest mode. To use this mode, just check the box. When inventory is transferred, no bills or transactions are created. Instead, if you have the accounting module, General Journals are created to move the inventory value between the stores, using the Inventory Transfer account.

Mode 2 – Bill

In this mode, Bills are created whenever a transfer is finalized (received). The store receiving the inventory gets a Bill saying they owe the other store for the amount of the tire, and the store sending the inventory gets a vendor Credit Memo, noting that they now owe that much less to the other store. To set this up:

- Create a vendor for every one of your stores.
- Uncheck the Mode 1 checkbox.
- Click in the **Mode** column of each Store once or twice, so that they all say **Bill**.
- At each store, click in the **Store's Vendor Name** column, and select the Vendor you created for that store.

Mode 3 – W/O

Use this mode if your Central location sells inventory to their other stores. In this mode, when the Central location ships inventory:

- The Central location gets a Workorder for the inventory sent, at the price level assigned to that store.
- The Store gets a bill from the Central location.

To set this mode up:

- Create a vendor for your Central location.
- Create a Customer for each of the other Stores.

- Set their price levels to whatever price they pay to the Central location when tires are transferred to them.
- Uncheck the Mode 1 checkbox.
- On the line for the Central location:
 - Set the mode to **W/O**.
 - Click in the **Store's Vendor Name** column, and select the Vendor you created for Central.
- On the lines for the other Stores:
 - Set the mode to **Bill**.
 - Click in the **Store's Customer Name** column, and select the Customer you created for that Store.

Invoice Copies

Navigation: From the Setup Entry menu, select the **System Settings** button. Then click the **Invoice Copies** tab.

Here you can specify how you would like your workorders and invoices to look and how you would like them to print. If you have multiple store locations, these settings only pertain to the store to which you are currently logged in.

Customizing Invoice Copies

For each copy you want printed, you will enter a name for the copy underneath each header. For example if you want both a customer copy and shop copy printed when workorders are made, enter *Customer Copy* and *Shop Copy* on two of the lines under the **Workorders** header.

- **Colors:** Select the color you would like for each copy.
- **Cat:** Check this box if you would like catalog numbers of parts to be hidden for a particular copy.
- **Workorders:** This column has the headings for workorder copies.
- **Shop:** Check this box if you would like the hours for labor items to be displayed but no prices for a particular copy.
- **Cash Invoices:** Column has the headings used whenever a non-charge invoice is printed.
- **Charge Invoices:** This column has the headings used whenever a charge invoice is printed.



Note: If you are unsure how to set up these headers press the **Change to Standard Headers** button to see the factory settings. You can then change them as desired.

Settings

There are many other ways you can customize your copies to suite your company's needs. From Previewing a Workorder/ Invoice copy instead of auto printing, to allowing for a longer company name, each of these settings is self intuitive and easy to understand. Customize as you see fit and press the **Save** button when done.

- **Changing Printer:** By default, the copies will be printed ON whatever printer is set to default on your computer. However, if you would like to use a different printer, press the **Change Invoice Printer** button, and enter the name of the printer exactly as it is listed on your computer's **Devices/Printer** window. Also enter the name of the computer the printer is connected to. If you would like different

printers for invoices and workorders you may enter each printer's individual information. Press the **Save** button when completed.

- **Invoice Style:** Select the style of invoices and workorders that best fits your company. The most popular style is Parts & Labor, but feel free to try out any style to see what works for you. After you have selected a style press the **Save** button, and preview a workorder or invoice to see how the style will look.
- **Print Special Pages for Workorders/Invoices:** If you would like a special page to print with your invoices like a torque sheet or thank you page, use the box with the ... to select an image from the AutoFluent graphics folder, and check the box.
- **Changing Total & Taxable Subtotal:** If on the printed invoices you would like a different expression to be used other than the default "*Total*" and "*Taxable Subtotal*", manually enter the terminology on each line.

Sales Settings

Navigation: From the Setup Entry menu, select the **System Settings** button. Then click the **Sales Settings** tab.

Here is where you can set up the defaults used for invoicing. You will want to at least verify that these settings to your liking before you go live with AutoFluent and begin invoicing out customers. First, you will want to set up the Terms and Sales Categories.

New Customer Defaults

- **Cash Terms:** This will be the default terms for new customers that are created in the **Sales Entry** window; typically this is set as *Cash*.
- **Charge Customer Terms (Chg Cust Terms):** The terms you select here will be used for customers created in the **Customer Entry** as opposed to inside a workorder. Since customers created in the **Customer Entry** are usually charge customers, the default is usually set to *Net 30*.
- **Vendor Terms (Vend Terms):** The terms you use here will be used for new Vendors that are created in the **Vendor Entry** window. Again, the default is usually set to *Net 30*.
- **Tax Category:** This is the tax category that will be used for all new customers by default. The tax category can be changed at any given time in the workorder. Typically the default is the *Local Sales Tax*.
- **Cash Sales Category:** This is the Sales Category that will be used for all new customers created in the **Sales Entry**. Usually this is set to *Retail*.
- **Charge Sales Category (Chg Sales Cat):** This is the sales category that will be used for customers created in **Customer Entry**.

Cash Drawer

- **Cash Drawer Desired Amount:** This is the amount you normally want in the cash drawer. If money is taken out of the drawer during the day in the form of a Paid-Out, or a negative cash invoice, cash received from sales automatically replenishes the drawer (if it can) to keep the drawer at this level, and the extra is deposited.
- **Current Cash Drawer:** This is the amount in the cash drawer after the last Daily Report was run. It will normally be the same as the Desired Amount above unless more cash was taken out than was taken in.
- **Credit Limits:** If you want to offer a buffer or leeway when customers go over their credit limit while Invoicing, you can enter it here. You can enter both a dollar amount and a percentage. For example:
 - Enter \$100 and 10%.

- A Customer with a \$2000 credit limit would be able to charge \$2200 without a management override (10% over.)
- A Customer with a \$500 credit limit would be able to charge \$600 without an override (\$100 over.)

Settings

- **Cash Customer:** If you select a Customer here by using the ... button, that Customer will be used when you press the **Cash Customer** button in the **Sales Entry** window. A new Workorder is created for the Customer selected here.
- **Mechanic Tracking:** You may select one of the following levels of detail for tracking the work of your mechanics:
 - **Don't Track Mechanic Hours:** Even with this option, the Daily Report will still report on how much money each mechanic has generated, along with any commissions they have accumulated.
 - **Track Hours Only:** This is the most common option. With it, any time you specify a mechanic and a number of hours in a workorder, that work be sent to the **Mechanic Efficiency report** after the workorder is finalized (turned into an invoice.) If desired, you will also be able to press the **Mechanic Tracking** button in the **Sales Reports** window, and enter the actual hours each mechanic spent on each job. Then you can print a **Mechanic Efficiency** report, comparing the actual hours with the billed hours.
 - **Track Complete Jobs:** This is like the option above, but gives you the option of marking a job as completed before the workorder is finalized. This is useful if you regularly have jobs which last several days, and you want to pay your mechanics for their work performed before the complete job is done and the invoice is created.
 - **Let Mechanic's clock-in hours:** Select this option if you want your mechanics to actually clock in and out on each job. Giving your mechanics the ability to punch in and out of jobs means you will be able to compare billed hours and the actual hours that it took to complete the job. Although this is more work for our mechanics, the **Mechanic Efficiency report** will be able to give you a clear indication of who your most productive employees are.
- **Verbage for 'Declined' button:** If you would like different wording for the **Declined** button in the workorder, you may manually enter it here.
- **Most Common Time to Pick up Vehicles:** Select the time most commonly used for picking up vehicles. Whenever a Workorder is created, this time will be assumed until it is overridden. If the appropriate checkbox above is checked, this time will also print on the Workorder.
- **Give Warning When Customer is:** If you would like to receive a warning message when new workorders are made for customers who are overdue on their account you may choose to have this popup appear when they are 30, 60 or 90 days past due. You may also select *never warn* if you do not want to see a message appear for overdue customers at any time.

Statements / Finance Charges

Navigation: From the Setup Entry menu, select the **System Settings** button. Then click the **Statements / Finance Charges** tab.

Statements are a useful resource for reminding account customers of their current balance. When you print these Statements you have the option of creating finance charges. On this tab you can set rules for your Statements and Finance charges.

Statement Settings

- **Close the Statement Period on What Day of the Month?** Use the drop down box here to select the day that you would prefer your statement periods to normally end.
- **Print the Workorder Number on the Statements?** Each invoice has a unique workorder number associated with it, which is different from the invoice number. If you would like this number to be printed on your statements, check the box.
- **Use Future Due when Aging:** This is generally only used if your customers have terms like *Net 60* or *Net 90*. This adds another column to the **Statement** and **Aging Reports** called *Future Due*, so that you customers can see how much of the statement total is not yet due.
- **Age Each Store Separately Rather Than Consolidating Statements (Multistore)?** By default AutoFluent is set to age all stores at the same time when a Customer Statements report is run however, checking this box will allow you to age each store separately. With this box checked, you customers will get separate statements for each store they did business in, and each statement would show activity and a balance due for that particular store only. With it unchecked, your customers will get one consolidated statement, showing the activity at all the stores.

Finance Charge Settings

- **Annual Percentage Rate:** What interest rate do you want to use when charging finance charges for overdue accounts?
- **Minimum Charge:** What is the minimum fee you want to charge when charging finance charges for overdue accounts?
- **Terms for the Finances Charge:** When the Finance Charges are created, what terms do you want to put on them? (It is usually *Net 30*.)
- **For Accounts How Far Behind?** When creating finance charges, create them for Customers who are at least how far behind in their payments?

Statement Messages

Here you can have your statement messages vary according to how far past due your customers are. If these are blank, or if their balance is current, the Statement Message from the **Sales Category** window will be used instead.

 There are options to print or email customer statements; if you'd like to mail them it is recommended to use #9 double window envelopes for best results.

Vehicle Inspections

Navigation: From the Setup Entry menu, select the **System Settings** button. Then click the **Vehicle Inspections** tab.

Here you can set up how you would like your **Vehicle Inspection Sheet** to look. This can be accessed from the **Recommended Services** button found in the [Workorder](#) window.

Editing the Inspection Sheet

The inspection sheet resembles a spreadsheet and can be edited to your liking. You may add a new *Category*, add a new line, delete a line or move lines up and down using each appropriate button.

Settings

- **Create Recommended Services from Red and Yellow Inspection Lines:** By default when a category is highlighted as yellow (*needs service soon*) or Red (*needs immediate service*), they are added to the recommended service window where they can be accepted or declined by the customer. This is a very handy tool and typically this default setting is kept as it is. However, if you would like the system to not create these services you can uncheck this box.
- **Print Bulk Inspection Sheets:** You can print inspection sheets in bulk here. Otherwise, you can use the checkbox below to have them print whenever a workorder is printed. The advantage of that is that is that they will have the name of the customer and vehicle on them, as well as the workorder number. They can also be printed manually from within the workorder.
- **When sending Declined Services to the Workorder, send First Line Only:** When services are declined these are also sent to the workorder, to make it clear that the services were offered. Check this box if you would only like the first line sent. Most shops prefer this to be checked.
- **Don't Automatically Print the Inspection Sheet with the Final Invoice:** If you would not like the inspection sheet to print with the finalized invoice, check this box.
- **Always Print the Mechanic Inspection Sheet with the Workorder:** Instead of printing inspection sheets in bulk, you may check this box so that an inspection sheet is only printed when a copy of a workorder is printed.
- **Use Icons rather than Good/OK/Bad:** If you would rather icons instead of the wording being used to indicate to the customer what categories are good, ok or bad, you may check this box.

W/O Graphic

Navigation: From the Setup Entry menu, select the **System Settings** button. Then click the **W/O Graphic** tab.

You can add a graphic to appear at the bottom of workorders only.

To Use Your Own Workorder Graphic

- Create a graphic as either a .BMP or .JPG type file. Ideally, this file should be 90 pixels tall and 200 pixels wide. If it is, the edges will be cut-off.
- Navigate to the TABS AutoFluent folder usually located in your C drive, open the Reporting folder and copy the file into the Graphics folder.
- Open the Logo tab in AutoFluent and press the Change Graphic button. The logo you just added to the Graphics folder will appear in the list of files.
- Then press the Save button to save your changes.
- Restart AutoFluent to see your changes.

Invoice Watermark

Navigation: From the Setup Entry menu, select the **System Settings** button. Then click the **Invoice Watermark** tab.

You can add a watermark image to the background of your invoices and workorders here.

To Use Your Own Watermark

- Create a watermark as either a .BMP or .JPG type file. Make sure it is lightly colored so that the invoice will still be readable. Our support staff would be happy to help you with this.
- Navigate to the TABS AutoFluent folder usually located in your C drive, open the Reporting folder and copy the file into the Graphics folder.
- Open the Logo tab in AutoFluent and press the Change Graphic button. The logo you just added to the Graphics folder will appear in the list of files.
- Then press the Save button to save your changes.
- Restart AutoFluent to see your changes.

Setup Expenses

Navigation: From the **Setup Entry** menu, select the **Expenses** button. This button will only appear if you are not using an integrated accounting software, and it replaces the **General Ledger Setup** button.

If you are not using an integrated accounting software, you will need to set up a list of expenses that will be used when you create **Vendor Bills** and **Paid-Outs**. You can use as many or as few expenses as you like. It is recommended that you only use one Expense for your Inventory, because your inventory costs are already broken down by Item Groups in the Daily Report.

Since you are not using the **General Ledger** or the **Checkbook**, you may choose to not enter Vendors for your rent, utilities or other bills that are not paid on account. So the list would just include items you would purchase on account, and expenses for money taken from the cash drawer.

A Short List of Common Expenses

- Inventory
- Gasoline
- Vehicle Maintenance
- Food
- Office Supplies

To create a new Expense, press the **New** button. To delete the currently selected Expense, press the **Delete** button. Before closing the window, press the **Save Changes** button.



Note: If you delete an Expense after using it in **Vendor Invoices** or **Paid-Outs**, it will continue to show up on the reports, but it will not be available for use in new transactions.

General Ledger Setup

Navigation: From the Main Menu select Setup Entry and then press the General Ledger Setup button

! This option is only available if your AutoFluent system is integrated with an outside accounting software like Quickbooks.

Here is where you can link the General Ledger Accounts in your accounting software to AutoFluent. These accounts need to be setup in your accounting software before they can be used into this window. AutoFluent technicians can help with this process of linking the accounts.

Before linking the accounts, click the button at the bottom to **Refresh Accounts from Accounting Software**.

! If you add, change or delete accounts in your accounting software, you will need to return here and click **Refresh Accounts from Accounting Software** again.

Each row must link to a valid account in your accounting software. For example, the first row, *Cash Drawer* must link to the account you are using in your accounting software for your Cash Drawer. To select an account, click the word in the right column:

- A window will appear with your accounts from your accounting software. You will see the familiar search boxes at the top. Use these to navigate through the list to find the desired account.
- To select an account, double-click it, or press the **Select** button.
- To exit the window without selecting anything press the **Cancel** button.
- If the account you are looking for is not in the list:
 - Add the account into the Chart of Accounts of your accounting software, and
 - Press the **Refresh Accounts** button at the bottom of this window.

To make sure that everything that you have added is a valid press the **G/L Integrity Check** button. This will report any problems with the G/L setup or the inventory setup, as well as any errors that may be present in your [Item Groups](#), if the report comes back “OK” then you are ready to post your daily reports into your accounting software!

Employee Setup

Navigation: From the Main Menu select **Setup Entry** and then press the **Employees** button.

Here you set up your employee's rights, and set up your time-clock and scheduler. There are 5 tabs:

- [Sales Reps / User Logins](#): Enter employees login and commission information and their rights.
- [Timeclock Employees](#): Enter the employees using the timeclock, and their schedules.
- [Timeclock Setup](#): Set up your shop hours, vacation times and timeclock rules.
- [Scheduler Setup](#): Set up your Scheduler and Labor Departments to schedule appointments.
- [Chores](#): Set up chores for your mechanics to clock in on when not working on vehicles.

Sales Reps / User Logins

Navigation: From the Main Menu select **Setup Entry** and then press the **Employees** button.

From the Employees setup window you can not only create logins for employees, but you can also setup their commission rates, their various permissions, and their rights to other stores if applicable.

Creating Employee Log-ins

- Press the **New** button
- **Initials:** Enter the Initials of the employee. This can be one to three characters. It must be unique to each employee. (If you are on a Multistore System, it is required that all of these initials be unique among all stores, because any employee can visit any store.)
- **Name:** The full name of the employee.
- **Mechanics/Sales Rep:** Is the employee a mechanic, sales rep or both? Check the appropriate box(s).
- **Phone 1 & 2:** These are the personal and alternate numbers for the employee. These are optional.
- **Parts/Labor Comm %:** What is the commission rate that this sales rep will receive on parts and/or labor? This information can always be changed later.
- **Base on:** If applicable, what will the commission rate be based on, Sales or Profit?
- **Active:** Is this a current employee who is able to log in?
- **Login Password.** Although a password is not required, it is highly recommended that users have passwords. This is especially important for users with full system access. In fact, if you have full system access, it is often prudent to create a second login for yourself with sales entry rights only. That way, if you log in at the front desk to create a workorder, you don't have to worry about logging out before leaving the workstation.
- You can optionally enter the cost the employee is paid for doing mechanic work in the cost column. This is not their actual wage, but a cost which will be associated with the labor performed, so you can get a rough idea of your gross profit in your sales reports.

 **Tip:** If an employee is no longer with the company it is best to uncheck the Active box rather than deleting the employee. If an employee is deleted you may find that certain reports are not accurate or are missing details. It is best to keep an employees information in the system for at least one fiscal year.

Setting Store Rights

If you have multiple locations and would like to set up certain employees with the rights to be able to login to different stores:

- Select the employee that you would like to grant store rights to from the list of employees.
- Depending on the role of the employee you may use recommended permissions by using the Sales Rep Defaults, Mechanic Defaultst, Sales Manager Defaults or Back Office Defaults buttons. You may also customize the employee permissions by checking and unchecking and of the boxes.
- Select the store that you would like to grant access to with the store drop down box. Press the Copy Permissions button and then the Paste Permissions button.
- If you would like to grant store rights for all stores you may do so quickly by pressing Copy Permissions and Past to All Stores.
- Similarly you may use the **Uncheck All** button to clear all selected boxes.
- Press the **Save Changes** button when you are done.

Setting Commission Rates

Basic commission rates can be set when initially entering the employee information, but the **Edit** button will give you many more options. Upon entering the Commission Setting window you will see two columns for **Parts** and **Labor**. Commission can be based on sales of parts, labor or both.

- **Base Commission:** What do you want to base the commission rate on? The total Sales of the invoice or the profit?
- **Commission % Before Cutoff:** Would you like your employees to make a different commission rate after they have met a certain goal? If so you can first choose the beginning rate. Say for example, you would like the employee to make 5% up until they have reached \$2000 then any sales after that they will make 10%.
- **Sales/Profit Cutoff Amount:** This is the dollar amount an employee must reach either by sales or profit before their commission % can reach the second rate.
- **Commission % after cutoff:** This is the rate that will be used on the amount after the **Cutoff Amount**.
- **2nd Commission Rate:** This is an additional commission rate which does not have a cutoff amount.

Timeclock Employees

Navigation: From the Main Menu select **Setup Entry** and then press the **Employees** button. Then select the **Timeclock Employees** tab.

* **Note:** Your employees **clock in and out** by going to the Main Menu and selecting the blue box that is displaying the current time. This can be done even before anyone logs in.

From the **Time-clock Setup**, you set up the employees that will be using the **Time-Clock** feature in AutoFluent. You may have salaried employees that are not set up in the Time-Clock, and you may have mechanics who clock in for the day, but never need to log into the system. For this reason, the **Time-Clock** is accessible on the **Main Menu** even before anyone logs in.

Creating a New Time-Clock Employee

- Press the **New** button.
- **Initials:** These will be the initials of the Employee. It can be between 1 and 3 characters long and must be unique for each employee.
- **Name:** Enter the full name of the employee.
- **Dept:** This represents the time-clock department for this employee. These departments are set in the [Timeclock Setup](#) tab. Departments are used to categorize employees in the reports and for assigning a department manager to check and edit punches. A Time-Clock Manager can only edit punches for the employees in their assigned department.
- **Labor Dept:** The Labor Department is used for tracking what employees are available for various tasks in the [Scheduler](#). They are setup in the **Scheduler Setup** tab.
- **Password:** Enter in this field the password they will use to punch into the timeclock. It can be up to 15 characters long and it is NOT case-sensitive.
- **Wage:** Optionally, you can enter the employees wages. It is used in the **Timeclock Report** to show gross pay for the period.
- **Overtime after 8/10 hours:** Does the employee get overtime after 8 or 10 hours in a day?
- **Holiday Pay:** Does the employee get holiday pay?
- **Schedule information:** Enter the times this employee normally works. The number of hours fills automatically when you enter the times, but it can be overridden (to allow for lunch breaks). To erase a time press the delete key.
- When all of the changes have been made press the **Save Changes** button.



Tip! To save time press the **Copy** button to copy this schedule, and paste it onto another employee using the **Paste** button.

Timeclock Setup

Navigation: From the Main Menu select **Setup Entry** and then press the **Employees** button. Then select the **Timeclock Setup** tab.

Within the **Timeclock Setup tab** you can setup various details regarding your timeclock including Store Hours, Timeclock Departments & their respective managers, as well as Overtime Rules & Holidays.

Store Hours

It is important to setup the store hours for two purposes:

- It sets the default times for new employees.
- It tells the scheduler which days are open so as to avoid and mistakes when making appointments, hours that are not open will be grayed out and will not be available for editing.

Enter the **From** and **To** times for each day that you are open. On days that you are not open you may leave these lines blank. To blank out a time, click on it and hit the **Delete** key on the keyboard. Press the **Save Changes** button when you are done.

Overtime Rules

In the overtime rules box you can setup how overtime is calculated in the system. If you pay overtime or double-time, select the corresponding radio button for each type of overtime you pay. After making changes press the **Save Changes** button.

- **For Overtime Calculation, the Payweek starts on:** Some companies start their weeks on Monday or some other day besides Sunday for the purposes of calculating weekly overtime. If you do, set it here. Otherwise, leave it set to Sunday.
- **Round Punches to:** Consult your local laws before setting a rounding option. If you would like to round your time clock punches to the nearest 5, 6, 10 or 15 minutes, you may select whichever interval you prefer. Otherwise, leave it set to *No Rounding*.

Time Clock Departments

The Time Clock Departments organize your Time Clock Employees by department. They serve two purposes:

- They are used in the Time Clock Reports to categorize your employees, subtotaling hours and wages by department.
- If a manager is assigned to a Department, that manager will only be able to edit punches for employees within that manager's Department.
- In most cases, it is best to leave the manager blank.

To create a new Department, press the **New** button. To delete the currently selected Department, press the **Delete** button.

To change or remove a Department Manager, delete the Department and recreate it.

Holidays

Here you establish holidays on which your store is close, or during which you pay your employees overtime.

To create a new Holiday, press the **New** button. To delete the currently selected holiday, press the **Delete** button. Press **Save Holiday** to save your changes.

Holiday

The name of the holiday that you would like to add.

Paid

Do you pay at least some of your employees for this holiday? Note that you can select which employees get holiday pay on the [Timeclock Employees](#) tab.

Closed

If you check this box, the day will not be available in the scheduler.

Date

Click this radio box if the holiday is on the same day of the month every year, then select the month, and the day of the month below.

Day of Week

Click this radio button if this holiday is on the same day of the week every year, then, specify the week number, the day of the week and the month.

Scheduler Setup

Navigation: From the Main Menu select **Setup Entry** and press the **Employees** button. Then select the **Scheduler Setup** tab.

Within the **Scheduler Setup** tab, you can customize a number of items that are found in your Scheduler, such as Labor departments, default hours, and the most common time a customer may come pick up their vehicle.

Setting up Labor Departments

The Labor Departments that you set up here will be the departments that are available in the scheduler to have appointments assigned to them. You can define up to six departments. These should represent the service work your shop typically performs. Give each department a meaningful name and try not to abbreviate unless you need to. After setting these, every Labor Item should be assigned one of the departments. This is done in [Inventory Entry](#).

Color

To assign a different color per department use the drop down box. Select one of the basic colors or you may use a custom color. Select colors that look different from each other and are easy to identify.

Default Hours

Here you can select the default hours for a typical job in each department. For example, if you assign 0.5 hours to the Lube department, the rep can just click the Lube button in the Schedule window to set a half hour lube appointment. The rep can then adjust the hours as desired.

Sorting the Departments

Once the departments have been chosen, you need to decide on the order in which they are usually performed. For example, would an alignment usually be done before a brake job on the same workorder? If so, the Alignment Department should be sorted before the Brake Job department.

- Set up the department names by entering them in the boxes on the left (as described in the section above.)
- Press the **Clear Sort Order** button

- Double-click on the department to be the first one in the list, next select the department you would like to be second on the list, and so on.
- Press the **Save changes** button.

Details:

Most Common Time for Customers to Pick Up Vehicles: What is the most common time that your customers come to pick up their vehicles? This time can be put on all new workorders and can be changed, either in the body of the [Workorder](#), or in the [Workorder Status](#) window.

Normally have Jobs Last Multiple Days? If you have jobs that typically last more than one day, check the radio box.

Number of Bays: Appointments can now be assigned to a particular bay number, set how many bays you have available and they will appear as options both in your scheduler and in your [workorders](#).

Sync Appointments with Google Calendar: The AutoFluent [Scheduler](#) also be synced with your Google Calendars, check this box to begin the process.

Chores

Navigation: From the Main Menu select **Setup Entry** and then press the **Employees** button. Then select the **Chores** tab.

Using the **Chores** tab you can create a customized list of the chores that employees can punch into when not servicing vehicles, helping your employees to always stay productive.

 Note that you do not need to specify every possibly kind of chore, since the employee can change the description as they clock into the chore.

Adding a New Chore

- Press the **New** button, you may manually enter a description of the chore.
- When you are finished press the **Save Changes** button.

If you would like to delete a line simply select it and press the **Delete** button.

Setup Sales Categories

Navigation: From the Main Menu select **Setup Entry** and then press the **Sales Categories** button.

In this window, you set up your various categories of customers, for various reports.

- On the [Daily Report](#), sales are summarized by these categories. For instance, if your categories are Retail, Commercial, and Wholesale, your Daily Report displays how much you sold to each of these types of customers, showing your sales and profit for the day, month, etc.
- The **Item Groups by Sales Categories** report under [Customer Reports](#) will break you sales down much further, for any time period.
- Most of the other **Customer Reports** let you report on specific Sales Categories.

Creating a New Sales Category

- Press the **New** button.
- **Code:** Enter a short Code for the sales category, such as: Retail, Comm, Whsle.
- **Name:** The full name for the sales Category, for example: Retail Customers.
- **Price Level:** Using the drop-down box, decide which price level this type of customer will typically use.
- **Default Tax Type:** Using the drop-down box choose which tax rate this type of customer will typically use.
- **Don't Expand Tire Packages:** This option will ignore next linked item for this sales category, and instead will only pull on individual items or packages. For example, this can be helpful for your wholesale customers who you know will not want a new tire package pulled onto a workorder when a new tire is attached.
- **Workorder/Statement/Invoice Messages:** These messages can be up to 200 characters long and will appear at the bottom of every respective form for customers in this sales category.
- Press the **Save Changes** button.

Details

- **Default Sales Category for this Workstation:** You can set a specific sales category to be the default for each workstation. Using the drop down box, select the sales category that you would like this workstation to default to.

- **Template for “Thank You” Email:** Here you can attach a [Thank You Email](#) to each specific Sales Category. This email will be sent every time an invoice is generated for a customer in that Sales Category.

Setup Sales Tax Rates

Navigation: From the Main Menu select **Setup Entry** and then press the **Sales Tax Rates** button.

In this window you will set up your various **Sales Tax Rates**. You should set up a tax rate for local sales, a zero tax rate for resale or wholesale customers, and any other tax rates. you may use.

 **Note:** If you have multiple locations that will have different local sales tax rates you will want to set up a different rate for each store. For example if you have a location in City A and one in City B you will setup two sales tax rates named CityA & CityB, then set the tax rate for each location to the rate(s) you just created.

Creating a New Sales Tax Rate

- Press the **New** button
- **Tax Code:** Enter a name for the tax code up to 15 characters long. Using a name like “Local” is a good example. Do not include the tax rate in the name. *Local 7%* would be a poor code to use, because the code cannot be changed if the tax rate increases without deleting and adding a new tax rate.
- **Local Tax Description:** A longer description of the tax rate, such as *Local 7% Tax*.
- **Part Rate %:** Enter the tax rate for parts.
- **Labor Rate %:** Enter the tax rate for labor.
- **Retread Rate %:** Sometimes there is a special tax rate for retread tires. If applicable to your business, enter it here. Otherwise, use the tax rate for Parts here.
- **Cutoff Amount:** The entire amount over the Cut-off amount gets taxed at the cut- off rate%. For example, if the Cut-off amount is \$5,000 and the cut-off rate is 6%, and the invoice total was \$5,200 then the first \$5,000 would be taxed the normal rate, while the other remaining \$200 would be taxed 6%.
- **Cutoff Rate %:** The rate taxed on the invoice’s taxable amount that exceeds the Cut-off rate.
- Press the **Save Changes** button.

 **Caution:** Deleting a tax rate can be problematic if it is already associated to several of your customers. It is much better to change the description of the rate, because the Tax Code is not visible at Point of Sale, or in the reports.

Setup Item Groups

Navigation: From the Main Menu select **Setup Entry** and then press the **Item Groups** button.

In this window, you can set up various Item Groups, and set up price matrix markups for each Item Group. If you are using integrated accounting software, you can also point your groups to your desired General Ledger accounts. Item groups are used to allow you to divide your inventory, labor and fees into more specific categories. This will allow for clearly defined sales reports, and much versatility when posting to your accounting software.

Creating a New Item Group

- Press the **New** button.
- **Group Code:** This can be up to 15 characters long to describe the group.
- **Description,** This is the full description of the group.
- **Type of Items (optional):** Select the type of item that will go into the item group. This simplifies the inventory entry. For example, if you are creating a new labor item, and are selecting an item group for this item, only the groups designated as labor will appear on the list to choose from.
- **Costed?** Check this box if you are keeping track of costs for this item.
 - Parts, tires, sublet labor, and sometimes freight and fees are costed.
 - Labor and most fees are not costed.
 - Costed and non-costed inventory items cannot be assigned to the same Item Group.
- **Active?** Uncheck this box if you do not want this group to appear on reports. If a group has been in use for a while, it is generally better to mark the group as inactive rather than delete it.
- Press the **Save Changes** button.

Accounts

If you are using an accounting interface, all groups *must* have General Ledger accounts assigned to them before posting the day. Costed groups (such as those containing parts) will have a sales, inventory and cost of good sold account, whereas non-costed groups (containing labor and fees) will only have a sales account. For more information see [Item Group Accounts](#).

More:

[Item Group Accounts](#)

[Item Group Subtotals](#)

Item Group Accounts

Navigation: From the Main Menu select **Setup Entry** and then press the **Item Groups** button.

For speed and simplicity, it is best to first enter your **Item Groups** without entering the accounts, and then to enter the accounts all at once. After all the groups are entered, you can follow this procedure:

Setting G/L Accounts to your Item Groups

- Select the account(s) for one of the groups by pressing ... and selecting them from the list.
- Some groups will just have an **Asset Acct**, but costed groups will also have a **Sales Acct**, and a **Cost of Goods Sold** account.
- Press the **Copy Accounts** button.
- Select another Item Group that uses the same accounts.
- Press the **Paste Accounts** button.
- Select each of the rest of the item groups individually that use these accounts and press the **Paste Accounts** button in each of them.

AutoFluent recommends that you ask your accountant how to set up your Chart of Accounts in your accounting software. However, here are some suggestions:

- Typically, you do not need more than one inventory account, because this system already has many reports that break out the inventory into groups.
- Create an account called Sales as an Income type account. Then set up all your sales accounts as Sub Accounts of this account. Again, however, multiple sales accounts are not required, because you have these item groups.

Examples

Here are some example accounts. Note that *Sales:Parts* is the QuickBooks way of referring to the account called *Parts*, which is a Sub Account of the *Sales* account.

- Accounts for Stocked Parts Groups
 - Sales:Parts
 - Inventory:Parts
 - Cost of Goods Sold:Parts
- Accounts for Outside Parts Groups

- Sales:Outside Parts
- Inventory:Outside Parts
- Cost of Goods Sold:Outside Parts

- Accounts for Outside Labor Groups
 - Sales:Sublet Labor
 - Inventory:Sublet Labor
 - Cost of Goods Sold:Sublet Labor

- Accounts for Shop Labor Groups
 - Sales:Labor (Labor is not costed)

- Accounts for Fees and Taxes Groups
 - Sales:Fees (Fees are not costed)

Item Group Subtotals

Navigation: From the Main Menu select **Setup Entry**, and press the **Item Groups** button. Then select the **Item Group Subtotals** tab.

The **Item Group Subtotals** allows you to have a section of the Daily Report which will summarize the Item Groups. For instance, if you have 10 item groups referring to different Tires, you could have a subtotal called *Tires* that tells you how many tires were sold in all, and what your total sales and profit was for them.

To Create a and Edit Subtotals.

- Press the **New** button.
- Enter the **Group Subtotal Name**.
- Press **Save Changes** or **Cancel Add** to save or cancel the save.
- To delete, select a line and press the **Delete** button.
- To change the description, delete it and create a new one.

Apply Groups to Subtotals

Once you have set your Item Group Subtotals, navigate to the Groups to Subtotals tab.

- Select a **Group Subtotal** in the left list.
- Select Groups from the **Uncategorized Item Groups** on the right to be added to the selected **Group Subtotal** on the left. This will add the Item Group to the list in the center.
- To change your mind and remove a Group from the **Group Subtotal** list in the center, simply click on the Group.
- **Save Changes**.

With these changes you will find that you will have much more concise and useful Daily Reports, telling you only as much information as you want to know.



You can change these Item Group Subtotals at any time, and reprint old Daily Reports to get new perspectives on your sales history.

Setup Terms

Navigation: From the Main Menu select **Setup Entry** and then press the **Terms** button.

Within the **Terms** tab you will setup your various terms for your customers and vendors. At least one of these terms must be **Cash** terms with the checkbox in the *Cash* column checked. You can create several other terms including Net 30, terms that involve discounts for early payment, and even 30/60/90 terms with a separate discount for each month.

Creating a New Term

- Press the **New** button.
- In the **Description** field enter the name for your term.
- If these are *Cash* terms check the **Cash** box.
- If these terms will be used for Vendors only, check the appropriate box.
- Check the **Active** box to make this term available.
- Save changes.

Details:

Delete

Deletes the selected term.

Due By

If these terms are to be used for invoices that are due by a certain day of the month, click the round radio button by **Date**, and select which day of which month it will be due. For example, if the terms are Net 10th, select the 10th day of the month.

Discount #1-#3

If this term item is to be used for invoices that are to be discounted if paid early, enter the discount percentage under **Discount #1**. After the percentage is entered, you can then enter the day of the month or the number of days that the discount is valid. For example, if the terms are *2% discount if paid in full by the 10th day on a Net 30 account* follow these steps:

- Under the Due By heading click the radio button and enter 30 to represent 30 days.
- Under the Discount #1 heading enter 2 to represent 2%.
- Under the Discount #1 heading, click the top radio button and select 10th.

Now in both the Customer Payments window and the Vendor Payments Window, when invoices or bills with discounted terms are paid early, the discount is automatically applied (although it can still be overridden.)

 Note: If the term item is to be used for invoices that can be paid over two or three payments but still get discounts, you can use the 2nd and 3rd discounts. Simply follow the steps shown in setting up the Discount #1 section above to enter the discount percentages and due dates.

Setup Price Levels

Navigation: From the Main Menu select **Setup Entry** and then press the **Price Levels** button.

Here you can setup and modify the different price levels in your system, and specify which price levels are used at which location.

Standard Price Levels

Up to 12 different price levels can be defined by doing the following:

- Enter the desired name of the price level in any field. The first price level (Price A) cannot be hidden.
- If you have multiple stores that have different price levels for inventory, you may want to dedicate certain price levels certain stores.
- If you do not want certain price levels to show up at this particular store check the **Hide at This Location** button.
- Press the **Save Changes** button.

Special Price Levels

Here you can set up customized prices, calculated on the fly, based on costs and any of the 12 price levels defined above. Each price level can have as many rules as you like. For example, say you have some customers that get a special labor rate, and that gets a special discount on certain brands of parts. You would just create a price level with those rules, and assign it to those customers.

Prices Used

Use the drop downs to select the 6 prices levels that you would like to be displayed in the [Inventory Search](#) Window. You may also hide certain price levels in the inventory search by checking the **Hide** box. **Save Changes** when done.

To set back to original settings press the **Use Defaults** button.

Customer Prices

Here you can select a group of customers, based on their sales category, price level and/or terms, and assign them to a certain Price Level.

Setup Bank Accounts

Navigation: From the Main Menu select **Setup Entry** and then press the **Bank Accounts** button.

In this window, you can setup your individual bank accounts. You need to at least set up one checking account.

To create a bank account

- Press the **New** button.
- **Account:** Enter the account name (12 characters maximum).
- **Description:** Enter a description name of the account.
- **Last Reconciled:** Refers to the date that the bank account was last reconciled.
- **Bank Smt Beginning:** On the bank statement that was last reconciled what was the beginning amount?
- **Bank Smt Ending:** On the bank statement that was reconciled what was the ending amount?
- **Store:** Specify what store this bank account belongs to (if applicable). *All Stores* can also be selected.

To Delete an account press the **Delete** button.

Before closing the window press **Save Changes**.



Note: After setting up your account here, in the [Credit Cards/Bank tab](#) of the system settings window, you specify which bank accounts are used for sales, purchases etc.

Setup Item Types

Navigation: From the Main Menu select **Setup Entry** and then press the **Item Type** button.

To create or delete item types in this area please contact AutoFluent Technical support.

Setup Referred By

Navigation: From the Main Menu select **Setup Entry** and then press the **Referred By** button.

In this window, you can set up your various **Advertising Mediums**. This can be a great resource for figuring out which advertising sources are the most beneficial for bringing in the most new customers. For completeness, these should include Drive By and Friend, as well as any phone books, mailers or magazines you advertise in. Under [Customer Reports](#), you can print the **Referral Activity Report** at any time to see how well each of these advertising mediums is doing. For each advertising medium, the report shows the total sales, the average Invoice sale, and the percent of total new sales for all Customers that started doing business with you in a given time period.

- To create a new Advertising Medium, press the **New** button.
- To delete the currently selected line, press the **Delete** button.

To require that your sales reps select an Advertising Medium before invoicing any new Customer, in the [Defaults – W/O Tab](#) of the **System Settings** window, check the box under **Rules for Sales Rep** labeled *Require “Referred by:” for new customers*.

Setup Company Credit Cards

Navigation: From the Main Menu select **Setup Entry** and then press the **Company Credit Cards** button.

If you wish to pay Vendor Bills with your company credit cards, set them up here.

Before setting up your credit cards here, enter them as Vendors. For example, to set up a Wells Fargo VISA card, first set up *Wells Fargo VISA* as a Vendor in the [Vendor Entry](#) window.

- To create a new Credit Card, press the **New** button.
- To delete the currently selected Credit Card, press the **Delete** button.
- Before closing the window, press the **Save Changes** button.

Once credit cards are set up, they will be available to use in the [Vendor Payments](#) window. When paying a Bill, there is a **Pay By** dropdown box with the options of *Cash*, *Check* or any credit cards you set up here. (You may need to exit the Main Menu and restart TABS AutoFluent before they are available.)

Setup Manufacturers

Navigation: From the Main Menu select **Setup Entry** and then press the **Manufacturers** button.

To assist in find your parts and tires in the [Inventory Search](#) window, and to make your web site more informative, Manufacturers can be set up here and then assigned to your inventory items.

Once these manufacturers are set up here, you will be able to select them from the list in the [Inventory Entry](#) window.

 If a Manufacturer is entered in the [Inventory Entry](#) window that does not exist in this list, they will be added to this list automatically.

Setup Shipping Methods

Navigation: From the Main Menu select **Setup Entry** and then press the **Shipping Methods** button.

Here you can set up your various shipping methods. By selecting the **New** button, you can enter the name of the method, along with a longer description. Select **Save Changes** when completed.

You may also enter a normal (default) shipping method in the field at the bottom of the window. However, this is not required.

These shipping methods will then appear in the drop-down in the top right section of the workorder.



In the workorder, you are allowed to enter a shipping method that is not on this list, but doing so does not add that method to this list.

Setup Oil Viscosities

Navigation: From the Main Menu select **Setup Entry** and then press the **Oil Viscosities** button.

Here you may setup the **Oil Viscosities** that you will need for your lube packages.

- **New:** Enter the name of the Oil Viscosity as you would like it to appear in the drop-down of a Lube Package..
- **Save Changes:** Saves all Changes
- **Delete:** Deletes the selected item.

Utilities

Navigation: From the **Main Menu** select **Setup Entry** and then press the **Utilities** button .

The **Utilities** section is used by managers to update the inventory quantities, merge customers and more.

Inventory Tab

Recalculating Inventory Quantities

The **Recalculate and Refresh** button will perform two functions:

- If the **Recalc On-Order and Available Quantites** box is checked,
 - It will look at all of the Purchase Orders and make sure the on-order quantities are correct for all inventory items.
 - It will look at all open workorders and make sure that the available quantities are correct for all inventory items.
- If the **Clear all Backorders ordered before** box is checked, it will clear out the backorders before the specified date as well.

Update Last Ordered & Received Dates from P/O's

This simply verifies and fixes the dates in your inventory records.

! Warning! The two red buttons in the **Inventory Tab** should be used for emergencies only, or when starting fresh with a new system, as they will cause massive changes to your inventory that may not be able to be reversed without restoring a backup. Please backup your data first

- **Zero ALL Inventory Qtys:** This will set all inventory quantities to zero.
- **Zero All Negative Inventory Qtys:** This will set all inventory that currently has a negative quantity to zero.

Merge Inventory Tab

Use this to combine two inventory items into one. It will combine the sales and purchases to date, the transactions and the quantities on hand.

- Use the ... buttons to select the first Inventory Item(this will be the item that you will keep).
- Use the ... buttons to select the second Inventory Item(this will be the item merged into the first item).
- Press the **Merge** button.

Customers Tab:

These features are typically used by AutoFluent staff after data conversions:

- **Set Open Invoices:** Makes sure the open invoices are set up correctly.
- **Set Customer Totals:** Updates the **Sales to Date** totals for all the customers, and date first & last purchased.
- **Recalculate Deposits:** Analyzes the open Workorders to determine each customer's deposit balance.
- **Delete Old Quotes:** Permanently remove ALL Quotes dated before the specified date range.

Merge Customers Tab

Use this to combine two customers into one. It will combine the sales, purchases to date and all transactions.

- Use the ... button to select the first customer. This will be the customer that you will keep.
- Use the ... button to select the second customer This is the customer that will be merged into the first customer.
- Press the **Merge** button.

Merge Vendors Tab

Use this to combine two vendors into one. It will combine all history for the vendor.

- Use the ... button to select the first vendor. This will be the vendor that you will keep.

- Use the ... button to select the second vendor. This is the vendor that will be merged into the first vendor.
- Press the **Merge** button.

Setup Themes

Navigation: From the Main Menu select Setup Entry and then press the Themes button .

You can change the look of your Software by using the **Setup Themes** window. You will see upon opening the window a list of default themes. These will change the main background color and the secondary color for the various window of AutoFluent.

Try Theme

Using the **Try Theme** button you will be able to preview the selected them without having to permanently enable it.

Use Theme for this Station

The desired theme will only be applied to this station alone and will not affect the look of other stations.

Use Default Theme for this Station

This will revert the theme back to the default (see below).

Use Theme for All Stations

The desired theme will be applied to all stations, and not just this one.

Set as a Default Theme

This button will make the selected them your default theme.

Set Window Sizes and Positions to Factory Defaults on this Workstation

When you change the sizes of AutoFluent windows, the settings for these windows will be retained for the next time you use AutoFluent. If for any reason you would like to set the window sizes back to the original settings, you can press this button.

Setup Report

Navigation: From the Main Menu press the **Setup Reports** button.

This report is a handy checklist to help you keep track of your tasks at the end of the month or year. In AutoFluent, the year-end activities are the same as month-end ones.

Main Menu New

The **Main Menu** of AutoFluent is powerful yet also very simple and intuitive. From this window you have access to all of the corresponding modules and reports, access to the timeclock, scheduler, backups, updates, our online tutorial videos plus much more; if you have multiple store locations you will also be able to switch between your stores quickly and easily.

 [Click here for Online Training Videos](#)

From the Main Menu you can access the following:

Sales

[Daily Report](#)

[Track Mechanics](#)

[Clock-in Mechanics](#)

Inventory

[Purchase Orders](#)

[Inventory Count](#)

[Price Changes](#)

Customers

[Payments on Account](#)

[Adjustments](#)

[Email Mailings](#)

Vendors

[Bills](#)

[Purchase Orders](#)

[Claims & Cores](#)

Reports

[Inventory](#)

[Customers](#)

[Vendors](#)

Other

[Scheduler](#) – Click the **calendar** icon at the top of the window.

[Time Clock](#) – Click the **clock** icon at the top of the window.

[System Settings](#) – Click the **gear** icon at the top of the window.

[Resources](#) – Click the **AutoFluent logo**.

Support

[Data Backup](#)

[Software Update](#)

[Technical Support](#)