

CarTrack Dealer Tracking Software User Guide

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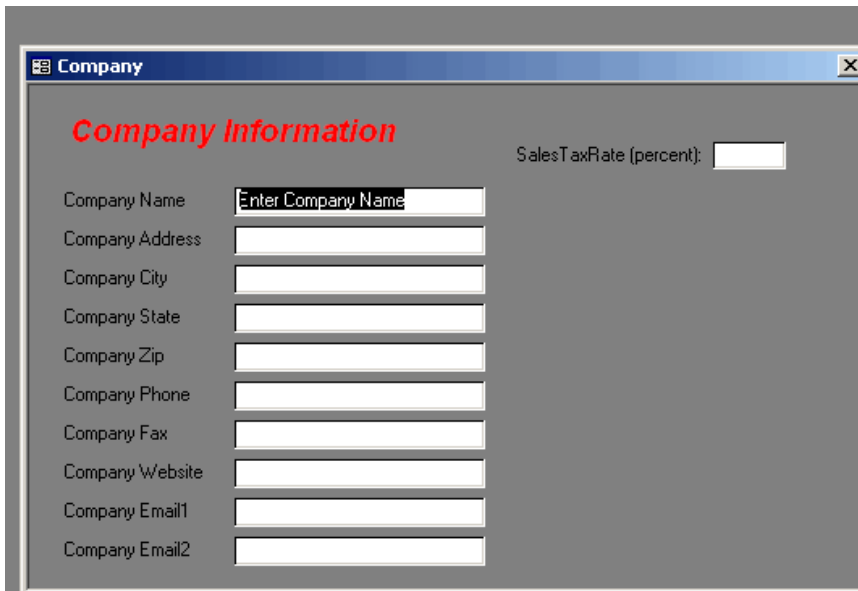
Important!

Your data is stored in a file at **c:\program Files\CarTrack** and the file is called **CarTrack 97.2.mdb**. It is most important that you back up this file frequently. Not doing so could result in the loss of data.

Always backup your files!

Enter Company Information

This is the first entry you want to make. This data flows to all the forms. The sales tax rate you enter here sets all your sales tax calculations.



The image shows a screenshot of a software window titled "Company". The window contains a form titled "Company Information" in red text. The form includes a "SalesTaxRate (percent):" field with a small input box. Below this are several input fields for company details: "Company Name" (with a placeholder "Enter Company Name"), "Company Address", "Company City", "Company State", "Company Zip", "Company Phone", "Company Fax", "Company Website", "Company Email1", and "Company Email2".

Enter your address, phone, website and any other information you want to appear on your letterhead.

Enter/View Vehicles for sale

This is where you log in your vehicles. Enter VIN, make and model. Enter your initial price for the car. Then you will be able to keep a running total of your cost basis as you add parts and services to the cost of the car.

Vehicles for Sale (Dealer view only)

Select Vehicle: [Dropdown] Stock #: [1]

VIN Number: 1LNHM81W9YY937317

Year: 2000

Make: Lincoln

Model: Towncar

Comments: [Text Area]

Status: Sold

Salesman: Berry, Bill

Date Acquired: 8/24/2004

Date Sold: 8/25/2004

Purchase Price: \$8,500.00

Total Maintenance: \$8.73

Cost Basis: \$8,508.73

Asking Price: \$16,995.00

Sold to:

Customer ID: 20

Company: [Text Area]

First Name: Mike

Last Name: Martin

Address: 8635 Manor Rd

City: Parkland

State: FL

ZipCode: 33071-

Phone: [Text Area]

Notes: [Text Area]

Buttons: Sales Transaction, Maintenance Log, Buyers Guide Form, Delete Record, New Record

Record: 1 of 14

As you log cars in the database it will assign a stock number. Notice also that in this screen you can print the Buyers Guide. It will ask you that stock number and then print the form.

You can set the current status of each vehicle. There are three levels: Being Serviced, Ready for Sale and Sold. This comes in handy for your reports and exports you will use.

If you have more than one sales agent you can choose their name in this screen. This will come in handy for commission tracking.

Maintenance Log

This is where you log all your cost items for that car. To log costs click on the Maintenance Log button in Vehicles for Sale:

The screenshot shows a software interface with two windows. The background window is titled "Vehicles for Sale (Dealer view only)" and contains a form with the following fields:

- Select Vehicle: 1994
- Stock #: 1
- Sold to: [empty]
- VIN Number: 1LNHM81W9YY937317
- Year: 2000
- Make: Lincoln
- Model: Towncar
- Comments: [empty]
- Status: Sold
- Salesman: Berry, Bill
- Date Acquired: 8/24/2004
- Date Sold: [empty]
- Purchase Price: \$8,500.00
- Total Maintenance: \$8.73
- Cost Basis: \$8,508.73
- Asking Price: \$16,995.00

The foreground window is titled "Maintenance" and displays the following information:

- Asset ID: 1
- Total Maintenance: \$8.73
- Maintenance Details table:

Date	Description	Performed by	Cost
7/27/2006	Fuel filler cap	Advance AP	\$8.73
* 4/28/2006			\$0.00

Record: 1 of 1

You can add any charges in this window and will keep a running total of all the charges and add it to the cost basis. Notice that it posts it to the Vehicles for Sale form. This way you know exactly what you have in the car when you prepare to sell it to your customer.

Sale Transaction Form

This is Step 1 of the sales process. Here you can work the numbers with the customer. Enter the customer's name, address, etc. in the gray box. Then click on the **Open a sales worksheet** button:

Sale Transaction Form

Enter Customer Information here:

Stock Number: 1
VIN Number: 1LNHM81W9YY937317
Year: 2000
Make: Lincoln
Model: Towncar
Comments:
Status:
Salesman: Berry, Bill

Date Sold:
Sold Price:
Additional charges:
Paint Protector: \$0.00
 \$0.00
Documentation Fee:

Sub Total:
Sales Tax: Rate: .05
Grand Total:

Customer ID: 20
Company:
First Name: Mike
Last Name: Martin
Address: 8635 Manor Rd
City: Parkland
State: FL
Zip Code: 33071-
Phone:
Notes:

Bill of Sale
Odo Form
AS IS Form

Open a sales worksheet
Print the Sales Agreement

Record: 1 of 1 (Filtered)

Sale Transaction Worksheet

Now you can work out the price of the car and add on any extras and additional charges such as doc fees. This information will flow back to the Sale Transaction Form.

Sale Transaction - Customer

Sale Transaction

Stock Number:

VIN Number:

Year:

Make:

Model:

Comments:

Status:

Salesman:

Date Sold:

Sold Price:

Additional charges:

Paint Protector:

Documentation Fee:

Sub Total:

Sales Tax: Rate:

Grand Total:

Record: of 1 (Filtered)

Sales Worksheet - Customer

Stock Number:

Status:

Salesman:

Year:

Make:

Model Number:

Serial Number:

Comments:

Date Sold:

Sale Price:

Paint Protector:

Documentation Fee:

Subtotal:

Sale Transaction Form (Completed)

Sale Transaction Form

Enter Customer Information here:

Stock Number	<input type="text" value="1"/>
VIN Number	<input type="text" value="1LNHM81W9YY937317"/>
Year:	<input type="text" value="2000"/>
Make:	<input type="text" value="Lincoln"/>
Model:	<input type="text" value="Towncar"/>
Comments	<input type="text"/>
Status	<input type="text"/>
Salesman	<input type="text" value="Berry, Bill"/>

Date Sold	<input type="text" value="8/25/2004"/>
Sold Price:	<input type="text" value="16,000.00"/>
Additional charges:	
Paint Protector	<input type="text" value="\$125.00"/>
<input type="text"/>	<input type="text" value="\$0.00"/>
<input type="text"/>	<input type="text" value="\$0.00"/>
Documentation Fee:	<input type="text" value="\$95.00"/>
<hr/>	
Sub Total:	<input type="text" value="16,220.00"/>
Sales Tax: Rate:	<input type="text" value=".05"/> <input type="text" value="\$811.00"/>
Grand Total:	<input type="text" value="\$17,031.00"/>

Customer Information:

Customer ID	<input type="text" value="20"/>
Company	<input type="text"/>
First Name	<input type="text" value="Mike"/>
Last Name	<input type="text" value="Martin"/>
Address	<input type="text" value="8635 Manor Rd"/>
City	<input type="text" value="Parkland"/>
State	<input type="text" value="FL"/>
ZipCode	<input type="text" value="33071-"/>
Phone	<input type="text"/>
Notes	<input type="text"/>

Record: 1 of 1 (Filtered)

Notice that when you save changes it applies them to the Sale Transaction form. Now the sale is complete and you can print the necessary paperwork.

You can now print the Odometer Statement, the Bill of Sale and the As Is form by clicking the buttons and supplying the stock number.

Reports

Maintenance History Report

This report will supply a total of all costs associated with each car. It will prompt you to enter a beginning date and an end date.

Sales by Employee

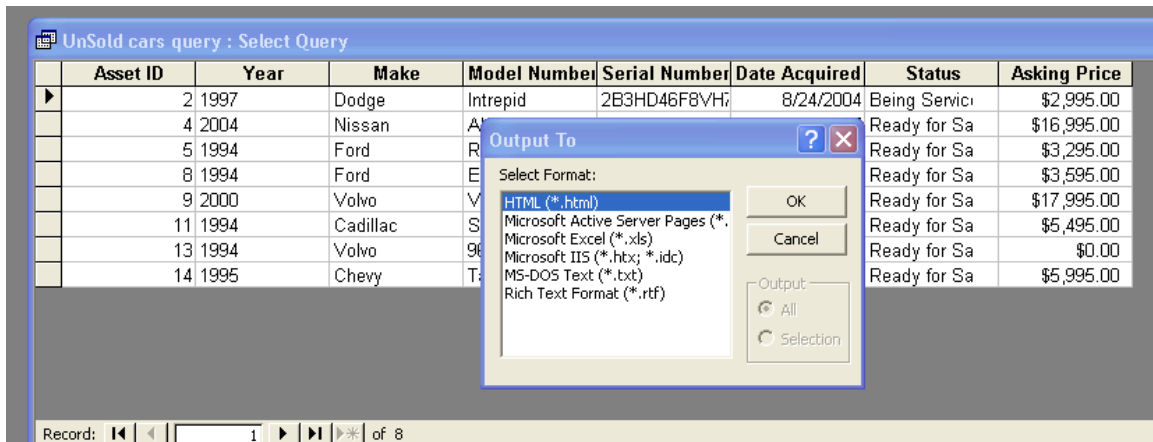
This report will generate total sales by each employee for commission payouts.

Sales Tax Report

This report provides a monthly breakdown of gross sales and the amount of sales tax collected.

Export Unsold Inventory to a file

This is a query to export your unsold cars to an external file for use as a spreadsheet, or to use in another device such as a PDA.



Choose a format to save in, usually xls (for Excel) and you will then be prompted for a location. Choose your folder and drive letter and click OK. You can synchronize the file with your PDA. Check compatibility of file types with your PDA device when you get ready to do this.