Learn About...

Infinity

By c-Systems®

Desk Reference

c-SYSTEMS
SOFTWARE
INCORPORATED

Table of Contents

Accessing the System

Before getting started, you should know…

This Reference guide is intended to cover only the **Basics** of system operation, and does not address many of the **Advanced** software features and options. For more detailed and comprehensive information, please refer to the **Infinity Help** files.

Infinity follows Microsoft® standards, so it behaves like a regular Windows® program, i.e., menus drop down from the Task Bar, the Tab key moves between fields, 'X' (or ESC) closes a window, keyboard shortcuts (such as Ctrl-C to Copy) work the same way, etc.

Also, depending upon the level of Security assigned to you by the System Administrator, some of the applications or menu items may not be visible or accessible. If this happens, check with the dealership's System Administrator, to determine which areas of the software you have been granted *permission* to access, before calling c-Systems. The Customer Support department will not make changes to User Roles (permissions) without the expressed approval of the Administrator.

Log On

1. Launch Infinity from the desktop icon.
2. Enter your **User Name** and **Password** then press **Connect.**
   NOTE: Do not change the server name. Verify the name and location if applicable.
3. If a Schema Changes window opens and asks you to **"…confirm that you want to apply databases schema changes"**, always answer **Yes**. This procedure keeps your software up-to-date.

Log Off

1. Within Infinity, click on **Windows** and select **Close All.**
2. Click the red '**X**' in the upper right-hand corner of the screen; or select **Close** from the **File** menu.
3. All computers must be logged out of Infinity at the end of the day.

Changing the Look of Screens and Menus

1. From the Main Menu, click **Format** and select **User Settings.**
2. Check (activate) or uncheck (disable) boxes under the different sections to customize the Infinity environment and grid functions throughout the system.
3. After changing selections, close and restart Infinity to implement the changes. **NOTE:** These settings are attached to individual logins.

4. *Outlook style* -- Replaces the tree style menu with an Outlook format that allows the user to designate Favorites and highlight the currently selected menu item.

5. *Favorites* – Allows the user to separate their most commonly used functions (i.e. sales orders, payments, repair orders) into a separate "Favorites" category for quicker access.

6. *Tool Bar* – The Tool Bar is displayed by going to '**View**' – '**Display Tool Bar**'. The Tool Bar runs along the top and allows the user to separate commonly used functions for quicker, one-click access.

Backups and Closings

Make a Copy of the Backup

1. Open C:\Program Files\c-Systems Software\Infinity\Bin\InfinityBackups (or the folder where the backups are stored).
2. Copy the most recent data file to a flash drive or CD/DVD.
3. Store the backup in a secure off premises location.

Daily Close

The Daily Close summarizes the business activity since the last time the close was run while allowing additional business transactions to take place.

1. From the Main Menu, open **Periodic Procedures** and double-click **Daily Close.**
2. The warning message **"Daily close will update your files and is irreversible. Please confirm that you wish to continue. Closing Date: "** will appear. Respond **Yes** to continue.
3. Allow the system to complete the Close process. Click **OK** to return to the Main Menu.

Steps to Complete Before Performing A/R Procedures

When the Month End Update procedure is run, the following actions occur:

1. The month is completed for A/R purposes.
2. Service Charges are posted to accounts that have past-due amounts if they are flagged to receive a service charge.
3. Records are prepared for A/R Statements and the Month End Trial Balance.
4. The months are rolled, beginning a new accounting period.

Before running a Month End Update, verify the following steps are complete:

Accounts Payable

1. Run a detailed Sales Tax report, accessed by expanding **Reporting > Sales Reports > Sales Tax Summary.** Confirm that the sales tax totals on the report match the General Ledger's *Sales Tax Payable* account.
2. From the **Vendor Maintenance** > **Tools** menu, run an Accounts Payable Trial Balance report. Compare the Total Payables amount on the report to the subledgered General Ledger account(s). The total of these accounts should equal the Accounts Payable Trial Balance.

Accounts Receivable

3. Scan the customer list and merge any duplicate entries. The Customer Merge works only if one of the duplicate accounts has no associated history records. The history is created after the Month End procedure is run.

4. Perform **A/R Transaction Matching** to clear Open Items with corresponding payments so they do not incur service charges.
5. Run a detailed Accounts Receivable **Trial Balance**, accessed from within **Customer Maintenance > Reports** menu.
   a. Compare any General Ledger account(s) that are subledgered to Accounts Receivable (Accounts Receivable, Customer Deposits) to the A/R Trial Balance. The total of the subledgered accounts should equal the Trial Balance Report Total Due, excluding any Dated Invoice(s).
   b. General Ledger accounts shows 100% of the amount of a Dated Invoice Due (Future Due) in the period in which the original invoice was issued. The Accounts Receivable Trial Balance, although it identifies Future Balance Due, does not include Dated Payments in the Report Total Due.
   c. Month End Update assesses service charges to past due accounts. This increases G/L accounts that are subledgered to accounts receivable.

General Ledger
8. Update the **Financial Statement Wizard** for any changes to the Chart of Accounts.
9. **Print** a detailed G/L Trial Balance report and review it for accuracy.
10. Compile and print the Financial Statements.
11. Run the Month End Update.

Month End Update

The Month End Update procedure may only be run after the last day of a month has closed. Infinity does not allow the Update to be run on the last day of a month or for future months.
1. Double-click on **Month End Update.**
2. Confirm the period to be closed by responding **Yes** to continue or **No** to cancel.
3. Click **OK** to acknowledge completion.

Year End Update

WARNING: This is an irreversible procedure and should only be run after ALL accounting transactions for the year have been posted. Do not use Infinity while the Update or the backup is running.
1. Open **Periodic Procedures** and select **Year End Update.**
2. Respond **Yes** to continue past the "**Are you sure you want to close the period ending (date)**?" warning message.
3. Allow the system to complete the process and begin a year end backup.
4. When Year End Update has completed, open the **System Configuration** to confirm that the **Period End Dates** have updated, and by spot-checking General Ledger accounts.

5. If you discover any problems, **<u>stop immediately</u>** and contact c-Systems' Customer Service department.

Setting Up Data

Product Line Setup

1. Select **Line Maintenance** from the Products and Services area.
2. Click on the ' **+** ' sign at the bottom of the screen, or press **Ctrl-I**, to generate a new entry form.
3. Assign a **Line Code** to the account. We suggest that you use the three character code that identifies the pricing database, followed by the first letter of the Line Type (P=Parts, W=Wholegoods, U=Units, A=Accessories or C=Clothing), such as HONP for Honda Parts.
4. **Product Code** - this field is used only for Purchase Order transmission to BossWeb for Bombardier product lines.
5. Type in a **Line Name.**
6. Select a **Line Type.**
7. Check the appropriate boxes if the Line is **Seasonal** or if it consists of **Remanufactured** items.
8. Choose a **Price Catalog Name** from the drop down list.
9. Assign an **ACS** (Auto Cross) **Name**, if applicable.
10. Enter a **Quantity Scale**, if required.
12. Enter a **Cost Discount Percentage**, if applicable.
13. A **Default Warranty Period** applies only to Wholegoods and Unit lines. Enter the default number of months.
14. Select a **Default Class Code**, if desired.
15. **Add Cost Factor** for any special manufacturer **Price Codes** and **Discount Cost Factors** that apply to the **Product Line** which are exceptions to the manufacturer pricing database.
16. Complete the remaining entries on the Setup tab, if applicable:
    a. **Low Gross Warning**
    b. **Default Cost Gross**
    c. **Default Freight Markup**
    d. **High Stock**
    e. **Primary Vendor**
    f. **Inventory Account**
    g. **Regular Orders** options – **Days' Supply** and **Percentage** of supply at which **Re-Orders** should be triggered
17. Add additional **Line Code References** for the Product Line:
    a. Press **Add** to open the **Alternate Line Code** window.
    b. Enter an **Alternate Line Code** to allow merchandise within this line to be accessed by either the primary or alternate codes.

Part Number Setup

1. Open **Products and Services** and click on **Inventory Maintenance.**
2. Select a **Product Line** and click **OK.**
3. Press **Ctrl-I** or click on the '**+**' sign to open a new entry form.
4. Enter the **Part Number**. Be sure to save the entry, the system does not save it automatically. Note: This is the *only* field that is actually *required* to sell or purchase a part.
5. Type a **Description** for the part.
6. Add the **Manufacturer Number** only if it differs from the actual part number. Leave this field blank if it is the same.
7. If the **UPC Number** differs from the actual part number, enter it here. Leave the field blank if it is the same.
8. Select a **Unit of Measure.**
9. Enter the **Package Quantity** by which this part is typically purchased. If the supplier will not break the standard package quantity on orders, check **Strict.**
10. Select a **Class Code**, if applicable.
11. Under **Pricing**, enter the **List**, **Cost**, and values for any price **Levels** that apply.
12. If pricing Levels are dependent upon the volume purchased, check **Quantity Breaks** and enter the amounts corresponding to each price.
13. **Computed Costs** are informational only amounts that are generated by Infinity.
14. Add **Factory Freight** if necessary. The resale amount is billed to the customer and the cost is the charge to the dealership.
15. Enter **Core Deposit** Resale and Cost values, if applicable.
16. Enter the manufacturer's **Price Code**, if any.
17. Check the appropriate boxes and fill in information if the following apply:
    a. **Eligible for Return** - the part may be returned to the manufacturer.
    b. **Price Lock Levels** (automated Price Updates only) - indicates that the price Levels should remain unchangeable during a Price Update. Checking this option does not lock out manual price changes.
    c. **Price Lock Cost** (applies to Price Updates only) - prevents the item's Cost from being changed during a Price Update.
    d. **Seasonal** - directs the system to calculate Order quantities based on the seasonal max calculation formula; this setting can be overridden by the Line Maintenance setting of the same name.
    e. **Hazardous Material** - part requires special handling for shipping or disposal.
    f. **Label by the Each.**
    g. **Manufacturer Popularity** code.
    h. If the part is sold as a **Matched Set Quantity,** enter the number of items in the matched set.

Stock

i. Designate whether the item should be **Ordered in Matched Sets.**
j. Enter the item's **Weight** (optional).

Stock

1. **Order Code** -Stocking, Non-Stocking, or of Write-Off Inventory status.
2. **Zone** - dealer defined field that identifies part location or region. A zone may consist of two numbers/letters/symbols to designate a particular area.
3. **Bin**- exact location of the part within the Zone.
6. **Dealer Popularity** - is not being utilized at this time.
7. **Calculated Stocking Levels** – system generated fields that determine optimum stocking and re-order points. User can not change the field.
8. **Stocking Level Overrides** - amounts entered into the Max and Order Point fields will override Infinity's Calculated Stocking Levels for ordering.
9. **Quantities**
   a. Use **Change Available Quantity** to establish a beginning Inventory or update the record after a physical inventory. Click **OK** to accept the entry.
   b. If he system is set up at the beginning of a new fiscal year, or if you plan to enter all of the transactions since the start of the new year, enter the number of parts in stock at **Year End.**

Alternates

To set up a relationship between this item and another Part Number, click on **Add Alternate.**

1. Choose the Type of association:
   a. **Alternate of** - part is a substitute/equivalent for another part number.
   b. **Re-Order as** - Purchasing department should re-order using another part number when the current stock is depleted.
   c. **Re-Number to** - the manufacturer or supplier has changed this part number to another.
   d. **Superseded to** - the part number is rendered obsolete and has been replaced by a different part number.
2. Select an **Alternate Line** and **Part Number** for the From and To entries.
3. Click **OK** to confirm the entry.
4. To delete an entry, highlight the grid line and press the **Delete** button, confirm by answering **Yes.**
5. Press **Alt-C** or select **Close** to exit the program.

Surcharges

1. To **Edit** an existing **Surcharge**, highlight the grid line and press **Enter**. Modify the entries as needed and click **OK.**
2. Set up a new **Surcharge** by pressing the **Add Surcharge** button.

3. At the **Surcharge Finder** window, select the **Surcharge** to be added and press **OK**. If the **Surcharge** has not been set up, press **Alt-A** to **Add** a new **Surcharge**, and complete the following steps:
    a. Select the Vendor to whom the **Surcharge** is paid.
    b. Type in a **Description** to be printed on the Customer Invoice.
    c. Add a **Comment**, if desired.
    d. Enter the **Net** price to be billed to the Customer.
    e. Enter the **Cost** paid to the Surcharge Vendor.
    f. Check the **Charge by Quantity** box if the fee should be multiplied by the number of the Part sold on the invoice.
    g. **OK** to confirm the entry.

Notes
1. Press the **Add Notes** button to create a new message for this part.
2. Enter a text message into the message box.
3. Select a note type, if applicable. Three types of notes are available for use on Parts, Accessories and Clothing product lines only. Regular Notes may be added to Unit and Wholegoods Lines.
    a. **Regular Notes** are recorded in the part file and viewable only when the Notes tab of Inventory Maintenance is selected; leave the combo box entry blank for Regular Notes.
    b. **Broadcast Notes** are displayed on the Notes tab of Part Search Tool.
    c. **Attachment Notes** print on the customer invoice.
5. **OK** to confirm the entry.
6. To Delete an existing Note, highlight the grid line and press the **Delete** key; answer **Yes** to confirm.

Images
1. Click on the **Add Image** button.
2. Locate one or more Images to be added to the file by:
    a. Selecting one or more existing or downloaded files from the local computer.
    b. Connecting to another computer using a network.
3. Highlight the file and press **Open** to load the Images.
4. Edit the Images using **Zoom (+) or (-)**, and **Options.**

Links
1. Click on **Add New Link.**
2. Enter a **Title.**
3. Type in the URL for the website address of the Link.
4. **OK** to confirm the entry.

Tax Code Setup

Tax codes are comprised of individual tax rates that, when added together, equal the full percentage due the taxing authorities. For example: the dealership charges Sales Tax of 8.25%; which is actually the sum of three individual taxes - 6.25% State, 1% County and 1% City. Using this example, three tax rates are set up and assigned to a single tax code.

The individual tax rates may be used multiple times to set up different tax codes. Each tax rate is treated as a separate entity with regard to taxability of merchandise and services, dollar or percentage limits, etc. If the tax code for the dealership consists of a single rate, then only one rate is set up and assigned to the tax code.

1. Open **System Configuration** and click on **Configuration.**
2. Select the **Receivables** tab and click the **Sales Tax** button.
3. To set up a new tax rate:
   a. Click **Add** to open the Tax Code Details window.
   b. Type a **Description** for the Rate, e.g. *State of Texas* and the applicable two character state postal code abbreviation.
   c. Click **Add Rate** which opens the Tax Rate Maintenance window and click the **Add** button.
   d. Select an **Accounts Payable Vendor** from the drop down list.
   e. Enter a percentage **Rate.**
   f. Under the **Taxable** heading, check the boxes to apply sales tax to merchandise and services.
   g. Click **OK** to close the window, or press **Advanced** to set up sales tax limits and/or exemptions.
4. When the tax rates have been created, assign the first rate to the tax code by highlighting it from within the Tax Rate Maintenance window and pressing **OK**. Repeat this step until all applicable rates are added to the tax code.
5. Repeat these steps to set up any additional tax codes.
6. Close the program.

Note: Changes to the Sales Tax records require Users to close Infinity and log back onto the system before the changes take effect.

Customer Category Setup

1. From **Configuration**, select the **Receivables** tab and open **Customer Categories.**
2. Click on **Add.**
3. Type a **Description** for the Category.
4. Select a **Pricing Definition** from the combo box drop down list.
5. Repeat steps 2-4 until all Categories are added.
6. To **Edit** a Customer Category, highlight the grid line and press Enter; make the necessary changes and click **OK** to save the new entries.

7. Close the program.

Customer Setup

Generally, customer records are added or changed from within Customer Maintenance as outlined below. Hhowever, they may also be added or changed 'on-the-fly' during Sales Order or Repair Order creation.

1. Open **Accounts Receivable > Customer Maintenance**.
2. Press **CTRL-I** or click on the **Add New Record** icon on the navigation bar at the bottom of Customer Maintenance.
3. Type the customer's Name and Address, E-mail address, Phone numbers and Contacts information.
   a. As US Zip Codes and Canadian Postal Codes are entered, the City and State/Province are automatically filled in or auto-corrected, as necessary.
   b. Icons for these features are activated as corresponding information is entered into the record.
      i. Labels - prints labels on demand.
      ii. **Cell Phone** - opens Text Messaging.
      iii. **E-mail** - initializes an Outlook-style message with Attachment capabilities.
   c. **Infinity** must be integrated to **Google Maps API** (within System Configuration) and have internet connectivity to use Address functions.
      i. **Show Location on a Map**
      ii. **Get driving directions from the dealership**
4. Select the customer's category.
5. Assign a default **Sales Person**, if desired. The **Sales Person** may always be changed at the time of the **Sales Order.**
6. Move to the **Settings** tab, and make the appropriate entries for:
   a. Statements
   b. Charge Account
   c. Sales Tax
   d. Shipping
   e. Pricing Structure
   f. SO / RO Options
   g. Accounting - if the customer is an Internal account, select an Expense Account from the drop down box.
7. Move to the **Ship To** tab and add any applicable Ship To addresses.
8. From the **Notes** tab, you can add **General**, **Broadcast** or **Attachment** notes to the Customer record.

14

9. To edit a Customer record, make the appropriate changes to the related fields.
10. Save the changes by pressing **Ctrl-S**, or click the **Save** icon at the bottom of Customer Maintenance, or press the **Close** button and respond **Yes** to save.

Users

Dealership personnel are designated as **Users** of the business system, and may be added/edited/deleted from the **Security** tab of **System Configuration**. Access to Users is restricted to those who have Administrative privileges.

1. Open the **Security** tab, click the **Users** button and press **Alt-A** to Add New.
2. Type the User's Name. Add an **Alias** allows identifying the person on invoices by a different name or number.
3. Assign **Login Information** - Login Name, Password and Role.
4. Check the appropriate boxes to designate the User as a **Sales Person**, **Counter Person**, **Service Writer** and/or **Mechanic**.
   a. Enter **Rate** and **Cost** information for Mechanics.
5. Select the **SMTP Settings** tab to enter email settings. Optionally activate the *Email Support in All Reports* option in **System Configuration** to permit Users to email from Report Viewer. Once the option is activated, an email icon becomes visible whenever Report Viewer is opened.
   a. Outgoing mail server - user's mail server name as defined in Outlook Express or similar mail client.
   b. Port - refers to the Outgoing mail SMTP port number; the default for most servers is 25, but several public email servers such as HotMail.com and Gmail.com, use a different port number (Check with your provider for more information).
   c. Requires Authentication
   d. User Name
   e. Use my email address checkbox
   f. Password
   g. Using Secure Password Authentication (SPA) checkbox
6. Repeat steps 1-5 until all Users are set up.
7. Delete a User by selecting the line and pressing the **Delete** key, respond **Yes** to confirm.
8. Edit a User by double-clicking the desired user and entering new information into the appropriate field.
9. Click **OK** to Save the entries and exit the maintenance window.

Purchasing

Create or View Purchase Orders

Purchase orders for Trade Vendors are created, viewed and managed, from within **Vendor Maintenance**, or from the **Inventory** area of Infinity. Access Vendor Maintenance by expanding the Accounts Payable selection from the menu, and opening Vendor Maintenance; or navigate to Purchasing by opening the Products and Services section, expanding the Inventory selection, and selecting Purchasing.

1. Click the **Open Orders** tab to view a list of all Purchase Orders currently Open for this Vendor. Information includes PO Number, Date Ordered, Back-Ordered, Received date, PO Status, Delivery Method, number of items, amounts, and any applicable notes. Select an order and press Enter to display the order's details.
   a. Depending upon the current status of the PO, specific options are available from the Open PO window. Access these options, or functions, by clicking the appropriate button:
      i. Initial - Delete, Print and Post
      ii. On Order - Reports, Receive Items, Reverse to Initial, and Cancel.
      iii. Received status - Reports or Release for Payment
2. To generate a new order, select **Create New PO** from the Open Orders tab.
   a. Select the **Parts** tab for parts orders, or the **Wholegoods** tab for Wholegoods orders. (Note: The Wholegood tab does not appear if no Wholegood Lines are assigned in this vendors' Purchasing Group.)
   b. Purchase Groups associated with this vendor are listed on the respective tabs. To exclude a group from the current order, delete it from the list. (Hold down the Shift key to select and delete more than one line at a time.) To add a line back to the PO, close the window and select **Create New PO** again.
   c. Add a special Purchase Order number, Delivery Method, or Notes applicable to this order. (Changes made here override the default values which appear automatically.)
   d. Check or uncheck ordering specifications applicable to this order when it is generated: Include Stock Order, Include Customer Back-Orders, Include Emergency Order, or Order in Package Quantities.
3. Press the Generate button at the bottom left of the window to automatically compile parts or wholegoods from the ordering criteria listed above. Expand each part record by right-clicking the mouse and selecting Expand,

highlighting the grid line and pressing Enter, or by clicking the plus sign '+' next to the line. Expanded view details:

    a. Order Code - whether it originated on a regular stock order, Customer Back Order, etc.

    b. Season stocking status

    c. Minimum and Maximum stocking level

    d. Stocking Quantity and Quantity Available

    e. Date Setup - date the Part/Wholegood was set up in Inventory Maintenance

4. To manually add Parts or Wholegoods to an order, select the **Add** button at the lower left of the window. Using either the **Part Search Tool** or the Wholegoods search window, locate the part or model numbers to include, and click **Add**.

5. Delete, Print, Post or Close the order:

    a. **Delete** the order to remove it from the system.

    b. **Print** allows access to Purchasing Reports, to view/print the PO in an Initial status, Pre-Receiving report, Check-in report or Labels.

    c. **Post** the order to place it in *On Order* status.

    d. **Close** saves the PO in Initial status; or if the PO has already been Closed, returns a message asking if work should be saved.

6. **Initial** - Order is saved without posting and may be used as a work in progress, but does not affect inventory, quantities ordered, customer back orders, etc.

7. **On Order** – items are posted to On-Order status. Any customer back orders present on the purchase order are reflected with the PO number on record.

8. **Received** - Parts/Wholegoods are received into inventory, but have not been released for payment through the A/P system.

Manage Purchase Orders

1. Access purchase orders from within **Vendor Maintenance** or from within **Inventory Maintenance**.

2. Click the **Open Orders** tab to view a summary of open orders for this Vendor:

    a. *Initial* - order is saved but not Posted and may be used as a work in progress Inventory quantities, quantities ordered, customer back orders are not affected.

    b. *On Order* - a Posted order that updates all relevant data.

    c. *Received* - Parts/Wholegoods are received into inventory, but have not been Released for Payment through the A/P system.

3. Choose a PO and, depending upon its current status, perform the following operations by clicking the appropriate button(s):

    a. Initial status

        i. **Delete** the PO.

        ii. **Print** a copy.

        iii.   **Post** to place the PO in On-Order status.
- b.   On-Order status
  - i.   **Print** Reports – Purchase Order, Receiving, Check-in, Labels.
  - ii.   **Receive** Items.
- c.   **Cancel** a PO that is On-Order and reverse any related inventory data. **NOTE:** Cancelling a PO adjust entries within Infinity, but it does not cancel the PO with the vendor. Contact the vendor to verify the order is not processed if it has been sent to the vendor.
- d.   **Merge Purchase Orders** - combine two Purchase Orders that are in Initial or On-Order status.
  - i.   Select two POs by holding down the **Ctrl** key and clicking on the appropriate lines of the grid.
  - ii.   Press the **Merge Purchase Order** button.
  - iii.   Confirm the PO Numbers being *Merged From* and Merge *To* by pressing the **Merge** button; all of the parts or wholegoods from both orders are combined onto a single order.

  NOTES: 1) Merging multiple purchase orders must be done two at a time; 2) A parts order cannot be merged with a wholegoods order.

Receive Purchase Orders

1. Select and open the desired purchase order and choose either **Set all Received** or **Set all Back-Ordered**, depending on which applies to most or all of the parts on the order.
2. Make changes to the receiving status or adjust the cost information for individual items, highlight the line and press **Enter**, or double-click the item line to open the *PO Receiving* window. Enter quantities that differ from the original order quantity, i.e.. Back-Ordered, Over/Short, or new Cost/List information.
3. Correct items that have changed part numbers by pressing the **Supersedes** button and selecting *Alternate of, Re-Order as, Renumbered to*, or *Superseded to*, from the **Type** drop down box. Select a different line, if necessary, and enter the correct part number.
4. Wholegoods must be received by Serial Number:
   - a.   Use the **Add Wholegoods** button to enter serial numbers.
     - i.   To receive multiple wholegoods, press Enter to reopen the *SN Entry* window and auto-fill the box with the last number entered (for sequential numbers) and change only what is necessary, or backspace to clear the field for a new entry.
     - ii.   When the number of items received equals the serial numbers entered, the *PO Receiving* form will close.
5. Press **Receive Items**; verify the information and respond **Yes** to confirm.

6. Once the order has been received, it may be entered into A/P by clicking **Release for Payment** to open the *New A/P Invoice* window.
    a. Type the corresponding Invoice number.
    b. Enter the invoice date.
    c. Receive wholegood and unit items to a Flooring Vendor to allow correct reporting and processing.
        i. When a wholegood or unit is received to a Trade Vendor, instead of a Flooring Vendor, the serial number or VIN number is NO LONGER ASSOCIATED with the invoice.
        ii. A purchase order released for payment to a Flooring Vendor creates a separate invoice for each wholegood or unit, by serial or VIN Number. The A/P Flooring Vendor function allows you to create Flooring reports and review serial/VIN numbers of items in stock or sold.
        iii. Although the equipment is added to inventory, the cost for wholegoods does not post until the purchase order is released. The cost for a unit posts when the unit is received. In the meantime, Unit/Wholegood Maintenance and the Floor Plan Payable accounts will be incorrect. If an item is sold before the order is released, Infinity recognizes this and debits COGS instead of the Inventory account.

Price Updates

Ordering a New Database

1. Open the Price Update main panel by clicking on the corresponding tab.
   a. **Effective Date** - identifies the database currently in use.
   b. **New Price File Available** – displays the effective date for the newest database file available for the product line, or verifies that the one being used is the most current.
   c. Whenever a newer version of a database becomes available, Infinity places an **Order** button in the **Order Now** column.
2. Press the button to open the order window
   a. Check the appropriate boxes to confirm the product line and request any supplemental databases.
   b. Press **Alt-O** to place the order with c-Systems.
   c. The database is usually delivered within one day.
   d. In addition to notations in the *New Price File Available* column, light bulbs provide a visual check of files:
      i. 🟢 database has been ordered but not received.
      ii. 🟡 a newer version is available.
      iii. 🔴 new database received, but not yet updated.

Update a Database

1. Click the **Update Now** button that appears in the Status column of the Price Update panel.
2. Within the open Price Update window, check or uncheck boxes to select the fields to be updated from the new database: Description, Unit of Measure, Popularity, Price Code, Manufacturer Number and UPC Number.
3. Designate how Cost should be calculated.
4. Check the Compare Parts with no dashes and spaces.
5. Press **Start Update**.
6. When the Update is complete, Infinity displays a message stating the number of updated parts.
7. Click the **Price Update Report** button to print a list of part numbers that did not update. These may include old or obsolete parts, invalid or "bad" part numbers, or any part whose Cost or List was not updated.

To access the *Price Update* window from *Line Maintenance* – enter the Line Code you wish to update; click on Tools and select Price Update.

If your database uses special Price Codes to determine a price level, enter them using the *Add Cost Factor* function. These codes are used to calculate cost when the database is updated.

Physical Inventory

Printing an Inventory Count List

1. Open **Products and Services > Inventory > Inventory Maintenance.**
2. Select a Parts Product Line at the Line Finder window and press **OK.**
3. Press **Alt-R** to open the Reports menu and **Enter** to expand the Parts Reports.
4. Use the arrow down key to select **Count List** and press **Enter**.
5. Click the appropriate tab to designate whether the list will be run by Line or by Zone/Bin. Select the product line from the drop down menu or enter the zone / bin criteria. Use the check boxes to set additional criteria:
    a. **Order Codes to be included** – Stocking Parts, Non-Stocking Parts, or Write Off Parts.
    b. **Other Filters** – Exclude Parts with Zero balances or No Sales - for a specified period of time, and/or those with no activity since the last Count, or Allocated Quantities.
    c. **Select an Order By** – Line/Part Number or Zone/Bin/Line/Part Number.
    d. **Page Breaks** – Between Zones or Bins.
6. Click **OK** to generate the report then press **Alt-P** or click **Print** to print sheets that may be used to record changes.

Start an Inventory Count

1. After an Inventory Count List has been generated and printed, start the count by responding **Yes** to the "**Do you want to Start a Count for this Line**?" prompt, or by clicking the **Start Count** button in the Report Viewer heading.
2. Once the count is started, Infinity tracks sales in the product line and 'check marks' items that change between the time the count is begun until the time the count is updated to inventory.
    a. If the count window is closed and must be re-activated, open the **Tools** menu of Line Maintenance and select **Inventory Count List.**
    b. Choose a product line from the list of Started Counts in the drop down list.
    c. Product lines that have been selected for a count are temporarily removed from the list of product lines available for a New Count.
3. To Exit the report without initiating a count, respond **No** to the prompt.

Make Inventory Corrections

1. Open the Edit Count List window by double-clicking on the first line of the Inventory Count form to start at the beginning, or on a specific line to change.
2. Enter the correct quantity in the New Count box.
3. Press **Enter** to **Accept** the entry and move on to the next line.
4. When all of the corrections have been entered, **Update the Database** to record the changes to the inventory.

Change the Quantity of an individual Part Number

1. Open **Inventory Maintenance.**
2. Select a product line and part number.
3. Tab to the **Change Available Quantity** button and press **Enter.**
4. **Enter new available quantity** and click **OK** to accept the entry.

Sales and Repair Orders

Create a New Sales Order

1. Expand the Sales Orders selection from the menu, and click **New.**
2. At the Customer Selection window, locate the customer's existing account by typing in the customer's **10-digit telephone** number and pressing **Tab**; or select **Search** and type the first few letters of the customer's **Name** and press Tab.   To narrow the selection results standard Windows wild card searches may be performed.
3. At the **Customer Selection** window, select **Edit** to make changes to the customer's information.
4. If no record is found, or the customer does not have an existing account, click **Add.**
   a. Type in the customer's information
   b. Change the **Category**, if needed
   c. Click OK to continue
5. At the **Bill To** tab, designate as required:
   a. Counter Person
   b. Department
   c. PO Number
   d. Transaction Type
   e. Sales Person
6. Infinity uses **Action Items** to group items together. Items may be grouped under a single heading, such as a typical parts order, or separated into multiple sections to identify items that belong together, apply a different tax code, etc.
7. Click the **Edit** button to change information on the default Action Item such as Description, Tax Table, Mechanic, Sales Person, Drop Ship, Address or Date.   Add a new Action Item using **F2.**
8. Add items to the **Sales Order**, including: Parts, Labor, Notes, Units, Trade-in Units, Wholegoods, Miscellaneous items and Sets.
9. When all items have been added and the Action Item is complete, click **Check Out (F12).** If payment is required, the Payment Selection window opens. Select the appropriate payment type(s) and click **OK**. The payment window does not appear on charge transactions.
10. Click **Bill** to finalize and print the Sales Order.

Create a New Repair Order

1. Expand the Repair Orders selection from the menu, and double-click **New**.
2. At the Customer Selection window, locate an account by typing in the customer's **10-digit** phone number and pressing **Tab**; or select **Search** and type in the first few letters of the customer's **Name** and press **Tab**. Scroll to the customer, highlight the entry and select **OK**.
3. Designate a **Ship To** address, if prompted to do so.
4. At the **Customer Selection** window, click the **Edit** button to make changes to the customer's information.
5. If no record is found, or if you know the customer does not have an existing account, click **Add.**
   a.   Enter customer information
   b.   Select a **Category**, if different from default entry.
6. Click **OK** to continue.
7. Review the list of **Customer Units/Wholegoods** and select the one to be repaired; if the Unit/Wholegood is not listed, click **Add New** and enter the corresponding information.
8. Click **OK** to continue.
9. From the **Service Search Tool**, select a service to be performed and click **Add**; or close the window to proceed directly to the Repair Order.
10. At the **Bill To** tab, enter information related to the Repair Order, such as **Service Writer**, **Transaction Type**, **Odometer**, **Priority, Dates**, etc. Specific entries required by the dealership are identified by highlighted boxes.
    NOTE: All Repair Orders start as estimates and do not post back orders or allocate parts.
11. **Action Items** are used to group related items together on a Repair Order. Multiple requests may be grouped under a single Action Item. Multiple Action Items may be used to differentiate multiple service requests on a repair order including warranty and non-warranty repairs. Press **F2** to open a new Action Item.
12. **Edit** information on the Action Item Details window as needed:
    a.   Description (reason for repair)
    b.   Tax Table
    c.   Mechanic
    d.   Warranty Vendor (only a warranty claim will be filed)
    e.   Repair Order Status
       i.   Initially set to "Awaiting Start" before work is started.
       ii. User should change Repair Order Status to "In-Progress" once the repair has been started.
       iii. When all repair is complete, set Status to "Complete".
    f.   Department

g. Estimate
h. Date
13. Deposit on Repair Order
   a. Click the **Payments** button or press the **F11** key. In the Payment dialog box, choose the payment type, complete other necessary information, and click **OK**.
   b. Click **Cancel** or press the <ESC> key to close the payment dialog box. If the Repair Order is not billed out before the Daily Close, Infinity converts the payment to a deposit.
14. Add items to the **Repair Order**, including: Parts, Labor, Notes, Sets, Services, etc.
15. When all items have been added and the Repair Order is complete, click **Check Out (F12).** If payment is required, the Payment Selection window opens. Select the appropriate payment type(s) and click **OK**. The payment window does not appear on charge transactions.
   a. All Non-Warranty Action Items are combined and Billed together.
   b. Warranty Action Items may be billed separately or with other Action Items. Separate invoices may be printed.
   c. Warranty Action Items on the same Repair Order are or can be selected and billed separately to the Warranty Vendor and will be converted to a Warranty Claim.
16. When the invoice displays in Report Viewer, **Print** the Repair Order.

Save or Delete a Sales Order
1. Depending on the system configuration, press <ESC> to save or exit the sales order.
2. Depending on the system configuration, click the lower "X" to display the Save / Delete / Cancel option.

Search Tools
1. From the Main Menu or an Open Sales/Repair Order:
    a. **F3** for Parts Search Tool.
    b. **F7** for Wholegoods Search Tool.
    c. **F6** for Units Search Tool.
2. Enter the **Part/Model Number** and press **Tab**; perform a wildcard search using a portion of the number plus an asterisk (*) at the beginning and/or end of the number. For **Wholegoods** and **Units**, click the **Advanced** button to access Line, Serial Number and Classification fields.
3. Select the item.
4. Modify any information as necessary, such as Quantity or Price.
5. Use the buttons at the bottom of the window to:
    a. **Add** the item to a sales order.
    b. **Cancel** the search and return to the sales order.

Edit a Line Item

1. Double-click on the line, or tab to the line and press **Enter**, to open in **Edit** mode.
2. Edit the information as necessary.
3. Click **OK** to close the window and return to the invoice.

Take a Deposit

1. Add the Deposit to a sales order as a Payment.
2. Click OK in the payment dialog box after entering the deposit information. Click Cancel, or press ESC to close the payment dialog box.
3. Save the sales order. When Daily Close is run, Infinity automatically converts the open payment to a Deposit.
4. Once the deposit amount is entered, the result appears in the lower right corner where the subtotal amount appears.

Remove an Item from an Open Sales Order

1. Click on the line item to select it.
2. Press the **Delete** key on the keyboard.

Accounts Receivable

Run the Accounts Receivable Trial Balance

1. Open **Accounts Receivable > Customer Maintenance > Reports** and select the **Trial Balance**.
2. From the **Select Period End date** window, choose a date and check/uncheck filtering options to customize the report.
3. Click the **Run Report** button to open it in Report Viewer.
4. **Print**, **Email**, **Copy** or **Export** the report.

Run Monthly Statements

1. Go to **Customer Maintenance** and click the **Reports** menu in the title bar at the top of the window.
2. Select **Statements** and press **Enter.**
3. Choose a date on the **Select Period End Date** for Statement Run window.
4. Check/uncheck options to run **Interim Statement**, **Show Zero Balance**, or **Select on Past Due Balances.**
5. Select **Run Report** to open the Report Viewer:
   a. **Review**, **Print**, **Email**, **Copy** or **Export** the statements.
   b. Use the **Print** functions to select an individual statement or a range of statements.
   c. *Report Options* can be changed by pressing **Alt-C**, or clicking the **Change Options** button.

Troubleshooting

Screen or Program Locked Up

1. Press **Ctrl-Alt-Del** on the keyboard to open **Task Manager**.
2. Highlight the Infinity application and click **End Task**.
3. Restart Infinity and Log back into the system.

Infinity Error Reporting

1. When an error occurs during operation, the software generates an Infinity Error Reporting window that identifies the error and takes a snapshot of the system at that point in time.
2. Enter a brief description of what you were doing at the time the error occurred, and press **Send Error** to submit it directly to the Infinity programming team.
3. In most cases, you should **Close and Restart Infinity** to continue working. The error may prevent you from completing the previous task, but it generally will not cause you to lose use of the system. As soon as the error is repaired, an update will be forced into your software.

Printer Will Not Print

1. Verify the printer power is **On** and the printer is properly connected.
2. Verify that paper is loaded and there are no error messages.
3. Try to print a document from another Microsoft® program, such as Word.
   a. **Yes** - document prints
      i. move to the Infinity Main Menu and open **Tools > Printer Assignments**
      ii. Confirm that the printer is selected for the specific task; make any necessary changes and retry
      iii. If the assignment is correct and you still cannot Print, contact c-Systems' Customer Service, problem may indicate a network issue
   b. **No** – document does not print - call c-Systems' Customer Service.

Contact c-Systems

Customer Support
2201 Arlington Downs
Arlington, TX 76011
817-649-3100 phone
817-649-3199 fax

Website: www.csystemssoftware.com
Email: support@csystemssoftware.com
Hours: 7 am – 6 pm CST Monday - Friday
8 am – 5 pm CST Saturday

c-Systems Software, Inc.
2201 Arlington Downs
Arlington, TX 76011
817-649-3100 phone
817-649-3199 fax
www.csystemssoftware.com