

Introduction

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SYSTEM PT is a menu driven prospecting program, offering versatility, power, and features not found on more expensive systems. Certain of these features have been written into the software to insure tools are available to increase profits. The software is designed to facilitate the tracking and management of floor tracking and prospecting data. This manual is a guide for use of this system and includes descriptions of the procedures necessary to interact with the software. Sections cover contingencies, a reference guide, helpful tips for daily routines, and a general reference. If, at any time, a problem is encountered which is not covered in this manual or not understood, you may call JARVIS COMPUTER SOFTWARE collect for assistance.

1.

HARDWARE OVERVIEW

The computer can be described best by listing the major components which you will be using: memory, keyboard, screen, printer, and disk drive(s).

- A. MEMORY** controls and directs data operations, via the processor or microprocessor.
- B. KEYBOARD** is the means by which you communicate with the computer--an input device.
- C. SCREEN** is the means by which the computer communicates with the operator, how it "talks" with you--an output device.
- D. PRINTER** is another output device, providing more permanent records than the screen.
- E. DISK DRIVE(S)** is a device that stores programs on floppy or hard disk media.

The descriptions below refer to two computers, NEC* and IBM* using MS DOS* and/or UNIX* operating systems. However, the information below will also apply to some other systems, such as, TI*, COMPAQ*, etc., which are operationally similar to the hardware mentioned above. In effect, this software will function with any top-of-the-line MS DOS machine configuration.

KEY DESIGNATIONS AND USAGE

The keys used are listed in alphabetical order below.

- ALT KEY** is not used.
- BACKSPACE KEY** Moves the CURSOR (a blinking screen position indicator) left and will remove

* Registered Trademarks.

any characters left as it moves.

CONTROL KEY

The "CTRL" key, on the left side of the keyboard, is used in conjunction with other keys to produce specific results, shown below.

CURSOR

Is a blinking indicator of the present screen position.

CURSOR MOVEMENT KEYS

Are located on the lower right of the keyboard and are either separate or included with the NUMERIC keys. The CURSOR MOVEMENT keys are used to move the blinking cursor around the screen.

If the CURSOR MOVEMENT keys are part of the numeric key pad, employ the "NUM-LOCK" key at the top of the pad (IBM). Also, on IBM FUNCTION keys 7, 8, 9, and 10 are programmed to act as cursor control keys, because the cursor keys are incorporated in the number pad at the right of the keyboard and it is much more convenient to operate with these in a separate location. Set the the NUM-LOCK key to NUMERIC and use the listed FUNCTION keys to move the cursor.

The CURSOR MOVEMENT keys may be used to correct certain entry errors. In cases where the previous digit(s) is in error, you may use the CURSOR to backtrack and re-enter data, similar to the BACKSPACE key. However, the F1 key can be used to CLEAR the current field to speed corrections most of the time.

DELETE KEY

The "DEL" key removes characters from the screen as it passes over them, moving left to right.

ENTER KEY

Found on the right side of the keyboard near the numeric pad, this key is used to move from data field to data field. On compatible keyboards this is designated by a left pointing arrow just left of the number pad. There are two enter keys on some keyboards, designated RETURN and ENTER. This key does NOT save data.

ESCAPE KEY

The "ESC" key is at the top left or right of the keyboard. This key is used in

conjunction with the menus, like a FUNCTION key. Its main use is to SAVE data and MUST be used to save data entered.

FUNCTION KEYS

Are at the top or left side of the keyboard and provide specific routines.

F1 KEY

The F1 key is used to CLEAR an entry field, so that data may be re-entered for corrections. The use of this key is the same on all screens.

F5 KEY

the F5 key is used to EXIT a current working menu to the main menu. F5 is also used to exit from the main menu to the operating system. NOTE: The computer must NOT be turned off without first depressing F5. This may require striking the F5 key twice: once to move from a submenu to the Master menu and once more to exit to the operating system. A system prompt indicates an exit to the operating system.

INSERT KEY

Inserts a space in the input line, so a missed character may be entered in the field without rewriting the entire line.

NUMERIC KEYS

To enter numbers, use the NUMERIC keys at the right or top of the keyboard.

RETURN KEY

The RETURN and ENTER key, on the right side of the keyboard, perform IDENTICAL functions, indicating field data entry completion (a particular entry on a screen, like a part number) and moving the CURSOR to the next data field.

Refer to the MANUFACTURER'S USERS GUIDE provided with the computer for use with other applications.

2.

PURPOSE AND USE

2.1. MASTER MENU

Screen 2-1: PROSPECT TRACKING MASTER MENU

SYSTEM PT, PROSPECT TRACKING SYSTEM BY JARVIS COMPUTER SOFTWARE. (C) 1999

1. PROSPECT ENTRY AND UPDATE.
2. SALESPERSON PROSPECT REVIEW.
3. REPORTS.
4. ADVERTISING CODES.
5. REBATES AND PROGRAMS.
6. MAIL MERGE FILES.

FILE REBUILD

OTHER

- | | |
|-----------------------|------------|
| 21. ADVERTISING FILE. | 31. SHELL. |
| 22. PROSPECT FILE. | |
| 23. REBATES FILE. | |
| 24. SEARCH INDEX. | |

PLEASE CHOOSE [__]

F1=CLEAR CURRENT FIELD, F5=EXIT, F6=EDIT MENU, F7=HELP.

PURPOSE

The purpose of this program is to allow easy navigation of the various parts of the prospect tracking system. The sales representatives will use program #1, "Prospect Entry and Update," primarily. The other items on the menu allow sales management to retrieve data and review the efforts of the sales representatives.

MAIN MENU

1. PROSPECT ENTRY AND UPDATE

This program allows the modification or update of an existing prospect's record or the creation of a new record. This is the heart of the system. The name, city, salesperson, phone numbers, and other vital information are recorded here. Use this program to print the take-away documents.

2. SALESPERSON PROSPECT REVIEW

Use this program to review the active prospects for a particular salesperson. The screen allows quick and easy access of prospects without the repeated need to search for the prospects.

3. REPORTS

The Daily Work Plan, The Manager's Work Plan Recap and The Summary or Sales Performance are printed here.

4. ADVERTISING CODES

Select this program to enter new advertising codes or to update existing advertising codes. Advertising codes are attached to each prospect as a means of tracking advertising effectiveness.

5. REBATES AND PROGRAMS

Rebates and dealer cash are recorded in this screen. The dollar amount, programs ID, descriptions, effective date and expiration date are recorded.

6. MAIL MERGE FILES

Select this program to allow the exporting of the data from System PT to another software program such as Microsoft Mail Merge.

21. REBUILD ADVERTISING FILE

Use this program if the advertising file becomes damaged or the advertising files retrieval doesn't seem to work correctly.

22. REBUILD PROSPECT FILE

The prospect file should rarely need rebuilding, but if it does, use this program. The prospect file is indexed on the ID and the index is only used as a unique identifier. Use this program if the prospect file becomes damaged or the prospect files retrieval doesn't seem to work correctly.

23. REBUILD REBATES FILE

Rebates and dealer cash are combined into one file. This reduces the number of different lookups the programs must do and speeds the processing. Use this program if the rebates file becomes damaged or the rebates files retrieval doesn't seem to work correctly.

24. REBUILD SEARCH INDEX

You can search the prospect file by first name, last name, company, city, salesperson's code, or status. You should probably rebuild this index periodically. Maybe rebuild it once per month.

FUNCTION KEYS

The fkeys (function keys) at the top or side of the keyboard have the following functions:

- F1** clears the data entry field under the cursor.
- F3** allows the programing of F-keys F8 through F12.
- F5** returns the system to the master menu.
- F6** allows the editing of configuration files.
- F7** display help screen.

FIELDS

Enter the one or two digit choice or execute some special function using a function key.

F6-EDIT MENU

1. INTERMODULE COMMUNICATION FILE

Edit this file to change the configuration of the system.
The default editor is vi.

The information in this file consists of lines containing a "#" followed by a tag from the list below. The lines after the tag may contain the information it describes.

#fi_path is the path to the finance and insurance system. For example /u/system.fi

#management are the login names of the people who can change the status of the prospect from active to drop. Put all the user names on one line, separated by spaces. If a user is logged on as someone not in this list, the F3 Status option will not be available on the Prospect Tracking screen.

#print_menu is the actual menu and forms from screen 3 of the prospect screens (arrived at by pressing F6 from screen 2). The menu entries are pairs of lines. The first line in the pair is the wording of the menu item and the second line is the form to be printed.

#security switches on security. Follow this division with the menu item number and the logins that are allowed to use it. Example, only dave, nick and clare would be allowed to use program #1 if this line were present.

1 dave nick clare

#editor on the line following this division put the name of the editor you wish to use such as "sle.exe".

There are several other divisions that are used by the Mail-Merge program to remember what was entered on the screen. It is not useful to change them manually, so they are not documented here.

2.2. PROSPECT ENTRY AND UPDATE

Screen 2-2:

LOOK UP PROSPECT BY JARVIS COMPUTER SOFTWARE (C) 1999

```
+-----+
LAST NAME: _____ |Enter 3 or more characters of the last name. |
FIRST NAME: _____ |This search will include both buyer and co-buyer. |
COMPANY: _____ |
CITY: _____ |Leave this field blank to skip this search. |
SALES REP: _____ |
STATUS: _____ |
+-----+
```

SELECT (99=NEW): OF TOTAL PAGE OF
F1=CLEAR CURRENT FIELD, F2=NEXT, F4=PREVIOUS, F5=EXIT, F7=HELP.

PURPOSE

The purpose of this program is to easily find a prospect that has already been entered into the system or easily add a project to the system.

FUNCTION KEYS

The fkeys (function keys) at the top or side of the keyboard have the following functions:

- F1** clears the data entry field under the cursor.
- F3** allows the programing of F-keys F8 through F12.
- F5** returns the system to the master menu.
- F7** display help screen.
- ESC** saves the data or starts the report.

Special functions to this program:

- F2** will page forward the list of prospects.
- F4** will page backward the list of prospects.

FIELDS

LAST NAME

Enter three or more characters of the last name. The more characters you enter the smaller the list of matching records. To look up the last name of "Johnson", you could enter "JOH". If you do you could end up with "Johns", "Johanson", "Johnsen", as well as "Johnson". If you are unsure of the spelling, then entering less letters is actually an advantage.

FIRST NAME

Enter three or more letters of the first name. Again the more letters you enter, the smaller the list. First name lookup is not usually recommended because of the smaller number of common first names than last names.

COMPANY

Enter three or more letters of the company name. This must be the letters of the first word in the company name. If you entered in the prospect record, "THE BIG TOOL COMPANY", then you would look it up using "THE". Do not use "BIG" or "TOO".

CITY

Enter three or more letters of the city name. This must be the letters of the first word in the city name. If you entered in the prospect record, "NEW YORK" then you must look it up using "NEW".

SALES REP

Enter all three letters of the salesperson's code. This will not lookup on partial codes. All of the records with that salesperson will be displayed.

STATUS

Enter the first three letters of the status code. The status codes allowed are "ACTIVE", "SOLD", and "DROP".

USE

When you find the prospect you are looking for enter the number in the select field. If you do not find the prospect you are looking for then enter "99" in the select field to indicate that the prospect is new to the system.

Screen 2-3: SALES PROSPECT TRACKING #1

```
SALES PROSPECT TRACKING BY JARVIS COMPUTER SOFTWARE (C) 1999.
SALESPERSON: JES
ID # 000124      STATUS ACTIVE          NEXT CONTACT DATE: 11-13-99
                UP-TYPE: U              LAST CONTACT DATE: 11-12-99
ADVERTISING SOURCE: WALK                ORIGINAL CONTACT DATE: 11-12-99
                FIRST                    LAST
BUYER: Clare_____ Jarvis_____      CITY: Winona_____
ADDRESS: _____                     STATE: __ ZIP: _____
CO-BUYER: _____
COMPANY: _____
PHONE: (H):(507) 454-2575 (W):(____) ____-____ X _____
      (C):(____) ____-____ (F):(____) ____-____
EMAIL: _____
STOCK #: ____3677  YEAR: 97  MAKE: CHRY  MODEL: CIRRUS__  COLOR: DK_CHSNT
                TRADE 1      TRADE 2
TRADE-IN YEAR:  ____      ____
TRADE-IN MAKE:  _____
TRADE-IN MODEL: _____
TRADE-IN MILES: _____
APPRAISAL DATE:  __-__-__  __-__-__
TRADE-IN ACV:   _____
COLOR:         _____
BODY:         _____
F1 = CLEAR FIELD, F2=NEXT SCREEN, F3=ADD'L, F5=EXIT, F7=HELP, ESC=SAVE DATA.
```

PURPOSE

The purpose of this program is to allow entry of prospect data or to update the data of a prospect. There are two screens of data. To access the second screen press the F2 key.

FUNCTION KEYS

The fkeys (function keys) at the top or side of the keyboard have the following functions:

- F1** clears the data entry field under the cursor.
- F5** returns the system to the master menu.
- F7** display help screen.
- ESC** saves the data.

Special functions to this program:

- F2** Press F2 key to switch to page 2.
- F3 S** Press F3 S to change the prospect's status, if you are authorized to do so.
- F3 A** Press F3 then 'A' to access the advertising codes.
- F3 R** Press F3 then 'R' to access the sales rep codes.
- F3 N** Press F3 then 'N' to access the new vehicle inventory.
- F3 U** Press F3 then 'U' to access the used vehicle inventory.
- F3 T** Press F3 then 'T' to transfer prospect information to System F & I.
- F3 F** Press F3 then 'F' to program fkeys F8 through F12.

FIELDS

- SALESPERSON** Enter the three character code assigned to each salesperson. This is usually his initials.
- NEXT CONTACT** is the date that you will contact the prospect next. This is required.
- LAST CONTACT** is the date you last contacted the prospect. This is required.
- ORIG CONTACT** is the date you originally made contact with the prospect during this buying or shopping cycle. This is required. Do not use any date

that refers to the last time they purchased a car from you.

- UP-TYPE** is the type of contact. An "Up" is a prospect who walks into the dealership, having been attracted to the dealership by advertising or passing through the area. A "rePeat" is a customer that has previously purchased a vehicle at the dealership. A "Referral" is prospect that was referred to the dealership. The allowed up types are "U", "P", and "R".
- BUYER** Enter the the first and last name of the buyer. The first and last name is required unless you fill in the company name.
- COMPANY** You may enter the company name. If the company name is entered then the buyer is not required but is very useful.
- PHONE** (H) is home phone, (W) is work phone with optional extension, (C) is cell phone and (F) is fax number. One phone number is required.
- EMAIL** is the email address for recontacting the prospect. An email address consists of two parts. The first part before the "@" is the addressee and the second part after the "@" is the domain. An example is "jarvis@garviscomputer.com". Notice that the email address is all in lower case letters. It doesn't have to be all lower case but typically is all lower case. The case of the letters is important. Someday this system will be able automatically to send email to various prospects.
- STOCK #** is the stock number of the vehicle in your inventory the prospect is considering. This is not required. If you do not have what the prospect wants then fill in the make, model, year, and color fields that follow.
- TRADE** You may enter the information for up to two trade-in vehicles. The ACV is the appraised value of each vehicle. If this figure is entered then be sure to enter the appraisal date.

All other fields are self-explanatory.

USE

There are two ways to get to this program. You can select #1 on the master menu, which takes you to the Look-Up Prospect screen (see section 2 of this manual). You then select the prospect, or choose to enter a new prospect by typing 99 in the Look-up screen's Select field.

The other way to get to the Prospect Tracking screens is to select #2 on the master menu, enter your Sales Rep code, press Escape, and select a prospect from the list.

Once you are in the Prospect Tracking screens, you can enter or update the information, press Escape to save it, or press F6 (on the second screen) to print various documents.

Screen 2-4: SALES PROSPECT TRACKING SCREEN 2

SALES PROSPECT TRACKING SCREEN 2

		RETAIL
AGE OF UNIT	41	
STICKER PRICE:	19295.00	19295.00
INVOICE/COST:	18000.00	
MARKUP:	__1295.00	
DEALER CASH:	(___0.00)	
REBATES:	(___0.00)	(0.00)
ACCESSORY(S):	___0.00	0.00
SERVICE CONTRACT:	___0.00	0.00
DEAL PRICE	19295.00	
TRADE-IN ACV(S)	(0.00)	(0.00)
TRADE DIFFERENCE	19295.00	19295.00

NOTES: _____

F6=PRINT FUNCTIONS. F3=ADD'L & MOVE TO DEAL. ESC=SAVE DATA.
F1=CLEAR CURRENT FIELD, F4=PREVIOUS SCREEN, F5=EXIT.

PURPOSE

The purpose of this program is to compute the basic deal and attach any notes that you might have about, the prospect, the trade or the deal.

FUNCTION KEYS

The fkeys (function keys) at the top or side of the keyboard have the following functions:

- F1** clears the data entry field under the cursor.
- F5** returns the system to the master menu.
- F7** display help screen.
- ESC** saves the data or starts the report.

Special functions to this program:

- F3 D** Press F3 then 'D' to look up the program number and amount of dealer cash.
- F3 R** Press F3 then 'R' to look up the program number and amount of the rebate.
- F3 T** Press F3 then 'T' to transfer prospect information to System F & I.
- F3 F** Press F3 then 'F' to program fkeys F8 through F12.

F5

FIELDS

- STICKER PRICE** is non-enterable if a stock number was input on screen 1 but is available for input if a stock number was not input on screen 1. Enter the dollar amount with the point '.' separating dollars and cents.
- INVOICE/COST** is non-enterable if a stock number was input on screen 1 but is available for input if a stock number was not input on screen 1. Enter the dollar amount with the point '.' separating dollars and cents.
- MARKUP** is the dollar amount of the gross margin you wish to make on this vehicle.
- DEALER CASH** is entered when available. You may press F3 'D' to help you lookup the appropriate amount.
- REBATES** is entered when available. You may press F3 'R' to help you lookup the appropriate amount.

ACCESSORY(S) is the retail dollar amount of the additional equipment you will add to vehicle to suit it to the prospect.

SERVICE CONTRACT is the retail dollar amount of the service contract you will sell with the vehicle.

OTHER Age of the unit, deal price, trade A.C.V. and trade difference are calculated fields.

NOTES enter anything you want into the notes. This is for your use and the system does not use it in any manner except to store this information for you.

All other fields are self-explanatory.

USE

This is a continuation of the previous screen. See the previous section for use.

Screen 2-5: PRINT PROSPECT DOCUMENTS

PRINT PROSPECT DOCUMENTS BY JARVIS COMPUTER SOFTWARE (C) 1999

1. TAKE AWAY DOCUMENT
2. APPRAISAL
3. NOTES
4. SOLD

PLEASE CHOOSE [__]

F1=CLEAR CURRENT FIELD, F3=ADD'L FUNCTIONS, F4=PREVIOUS, F5=EXIT, F7=HELP.

PURPOSE

The purpose of this program is to make it easy to print pending sale info for yourself, the prospect, the appraiser, and the sales manager.

FUNCTION KEYS

The fkeys (function keys) at the top or side of the keyboard have the following functions:

- F1** clears the data entry field under the cursor.
- F3-E** allows the editing of the forms that will print.
- F3-D** tells the program to print the tag names rather than the data.
- F3-F** allows the programing of F-keys F8 through F12.
- F4** returns you to the previous data entry screen.
- F5** returns the system to the master menu.
- F7** display help screen.
- ESC** starts the report.

FIELDS

Enter the number of the document you want to print in the "Please Choose" field.

USE

You arrive at this screen by pressing F6 from the second screen of Prospect Tracking program. In normal use, simply select the form to print and hit Escape.

Press F4 to go back to Prospect Tracking or F5 to go to the main menu.

The format of the printout can be changed and debugged using the F3 Edit and Debug options.

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