Using Tags with Autostar for Windows

In this document, you will learn to:

- Maintain your list of tags
- Use tags in Inventory
- Use tags in Sales
- Use tags with Cashier screens
- Use tags with Collections screens
- Use tags with Autostar for Windows reports

Overview

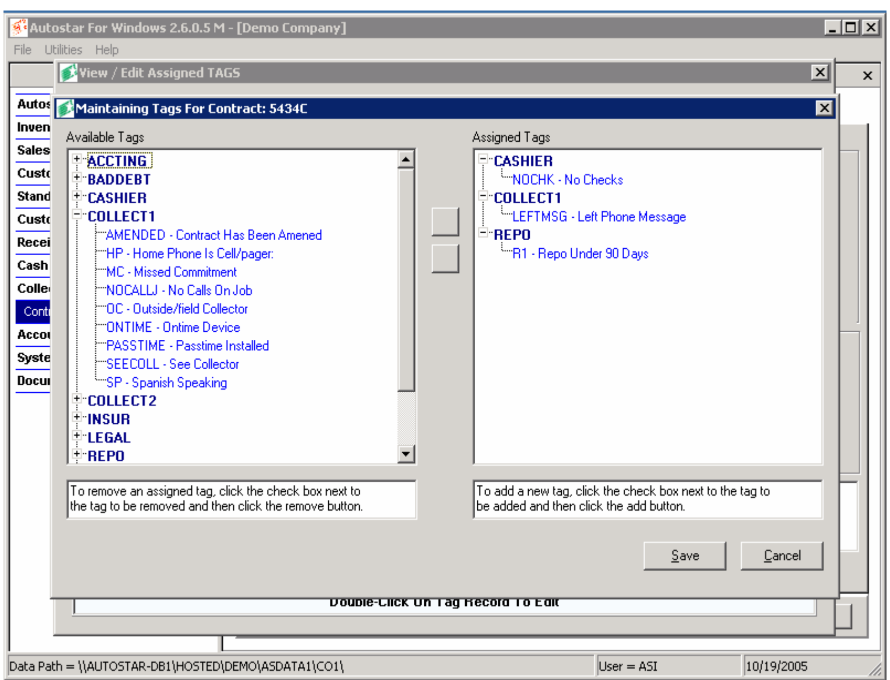
What Are Tags?

Tags are a way to assign specific information to an account within Autostar for Windows. A tag allows you to define information that isn't already captured by the system or to define information captured in the system in a way that you can use it. Tags can be assigned to a vehicle or any type of account (e.g., receivable, cash, wholesale, collections, etc.). Once you assign a tag to a vehicle or an account, you can use the tags to generate reports with special scope options based on the tag criteria.

For example, you can use tags to identify certain types of receivable accounts, such as accounts in bankruptcy. You can also use tags to identify the service status of a vehicle, such as a vehicle in the service department. Tags can also be used in collections, where they can identify skips and vehicles out for repossession.

How Do Tags Work?

Autostar for Windows has a set of default tags that you can modify. You can add or delete tags as necessary to meet your needs. You must first set up a group and then assign each tag to a group. You can have multiple tags within each group. Each tag has its own description. Tag names can be up to 8 alphanumeric characters. Group and tag names must be unique. The box on the left in the screen below shows examples of the default system tags available in the Collect 1 group.



Autostar has three system tags that are automatically assigned to accounts. The system automatically assigns a tag to an account when you:

- Put a vehicle out for repossession
- Enter a bad check
- Place an account in bad debt

These tags will be automatically assigned and removed by the system based on account activity. The only thing you can control for these tags is whether they "pop" (see "Pop Feature" below). Other than the above scenarios, you must assign tags to vehicles and accounts using the Tags function.

When you assign a tag to an account or vehicle, the tag information will appear on designated Inventory, Sales, Cashier, or Collection screens. Tags appear in a window on the following screens:

- Sold Inventory
- Past Sales
- Amend Contract
- Take a Payment (Cashier)
- Contract Write Off (Cashier)
- Contract Pay Off (Cashier)
- Add Side Note (Cashier)
- Collections Lite (Collector)
- Collector Pro (Collector)

Pop Feature

In addition to tags appearing on designated screens, you can designate certain tags to "pop" on a screen. When you assign a tag, you can specify where and how you want it to "pop." Autostar allows you to define the following ways to "pop" tags:

- **POP All** - If you select this option, the system will pop a separate screen that displays all tags upon entry into all of the screens listed in the section above. POP All overrides POP Cashier and POP Collector.
- **POP Cashier** - If you select this option and not the POP All box, the system will pop a separate screen that displays all tags only on the screens labeled "Cashier" above.
- **POP Collector** - If you select this option and not the POP All box, the system will pop a separate screen that displays all tags only on Collector screens in Collections Lite and Collector Pro. If you select this option and the POP Cashier option, then the tags will pop on Cashier and Collections screens only.

When you pull up an account or vehicle, the system pops one screen that displays all tags assigned to the vehicle or account. If there are no tags, no screen pops.

Maintaining Your List of Tags

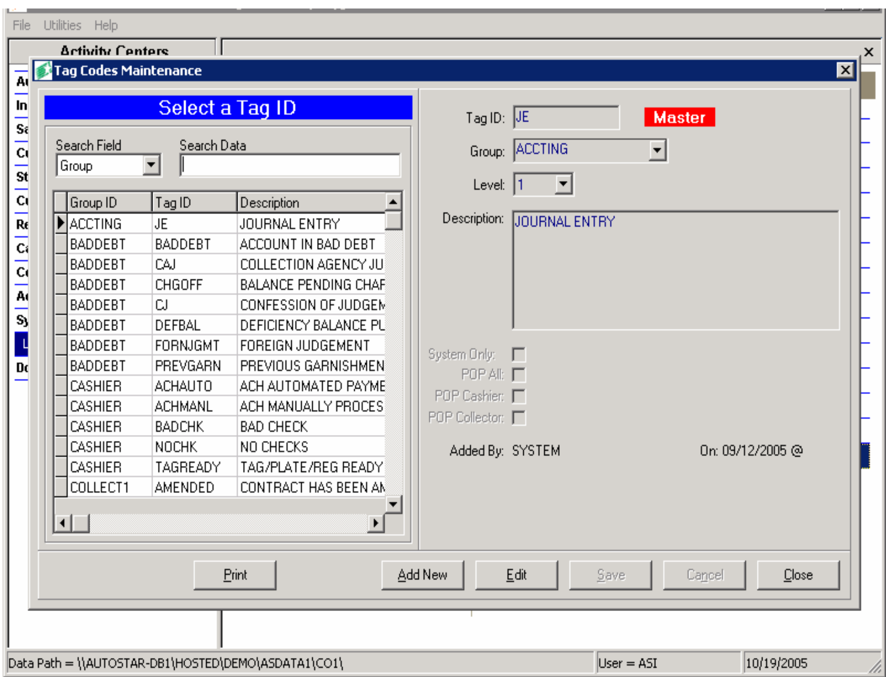
Autostar provides a master list of system tags that are already available in the system. However, you can add your own tags to this list or edit the existing tags. You can print a list of available tags using the “Printing a List of Tags” procedure on page 8. Refer to the appropriate steps in this section to maintain your list of tags.

Adding a Tag to the Master List

Complete the following steps to add a tag to the master list.

1. From the Autostar for Windows Home Page, click on **System Utilities**.
2. Click on **Lookup Maintenance**.
3. Click on **Tag Codes Maintenance**.

   The Tag Code Maintenance screen appears.



4. Click on the **Add New** button.

   The system puts the fields in editing mode. The cursor is in the Tag ID field.

5. In the Tag ID field, enter the characters you want to represent the tag. For example, enter WRECK to create a tag for wrecked vehicles. You can enter up to 8 alpha and/or numeric characters in this field. The Tag ID must be unique.
6. In the Group field, click on the down arrow to select the group that this tag is assigned to. If you need to add a new group, type the name of the new group in this field. The Group name must be unique.

7. In the Level field, click on the down arrow to select the priority level (1-5) for the tag (1=highest priority, 5=lowest priority). The priority level affects the way the tags are sorted and displayed on the screen.
8. In the Description field, enter a description of the tag.

Note: The System Only field is checked for all default system tags. You can't edit or delete system tags. If a check appears in this box, then it's a system tag.

9. In the POP All field, click on the box to check it if you want this tag to appear on all designated screens (i.e., Inventory, Sales Maintenance, Cashier, Collector). Leave this box empty if you don't want tags to appear on all screens.
10. In the POP Cashier field, click on the box to check it if you want to show the tag only on the Cashier screens. Leave this field empty if you don't want the tag to appear on the Cashier screens, or if you selected POP All. The POP All field will override this field.
11. In the POP Collector field, click on this box to check it if you want the tag to appear only on the Collector screens (Collections Lite and Collector Pro). Leave this box empty if you don't want tag to appear on the Collector screens, or if you selected POP All. The POP All field will override this field.
12. Click on the **Save** button.

    The system tells you the tag has been added.

13. Click on **OK**.
14. Click on **Close** to exit Tag Maintenance.

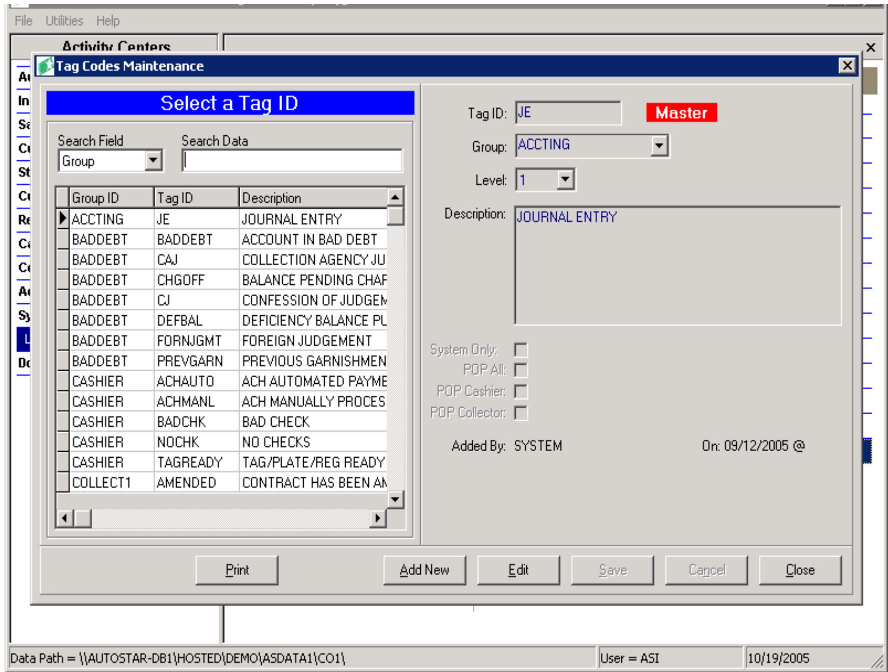
Editing a Tag in the Master List

From time to time, you may need to edit a tag in the master list. For system tags, you can only edit where the tag screens pop. For tags that you created, you can edit the group, the level, the description, and the POPs. Once a tag is in the system, you can't edit the Tag ID.

Complete the following steps to edit a tag in the master list.

1. From the Autostar for Windows Home Page, click on **System Utilities**.
2. Click on **Lookup Maintenance**.
3. Click on **Tag Codes Maintenance**.

The Tag Codes Maintenance screen appears.



4. In the table on the left side of the screen, scroll to select the tag you want to edit. Click on the tag.

Note: If you want to search for a tag instead of scrolling through the list, you can use the search boxes above the tag box. To search for a tag, click on the down arrow in the Search Field to select whether you're searching by Group or by Tag. Then, type all or part of your search criteria in the Search Data field. For example, if you want to pull up a tag in the REPO group, click on Group in the Search Field and then type "R" or "REPO" to jump to that group of tags.

5. Click on the **Edit** button.
6. The Tag ID field shows the tag ID. You can't edit this field. In the Group field, click on the down arrow to edit the group that this tag is assigned to. If you need to add a new group, type the name of the new group in this field.
7. In the Level field, click on the down arrow to select the priority level (1-5) for the tag (1=highest priority, 5=lowest priority). The priority level affects the way the tags are sorted and displayed on the screen.
8. In the Description field, enter a description of the tag.

Note: The System Only field is checked for all default system tags. You can't edit or delete system tags. If a check appears in this box, then it's a system tag.

9. In the POP All field, click on the box to check it if you want this tag to appear on all designated screens (i.e., Inventory, Sales Maintenance, Cashier, Collector). Leave this empty if you don't want the tag to appear on all screens.

10. In the POP Cashier field, click on the box to check it if you want to show this tag only on the Cashier screens (i.e., Take a Payment and Payoff screens). Leave this field empty if you don't want the tag to appear on the Cashier screens or if you selected POP All. The POP All field will override this field.
11. In the POP Collector field, click on this box to check it if you want this tag to appear only on the Collector screens (Collections Lite and Collector Pro). Leave this box empty if you don't want this tag to appear on the Collector screens or if you selected POP All. The POP All field will override this field.
12. Click on the **Save** button.

    The system asks you to verify the change in the tag.
13. Click **Yes** to save the changes. Click **No** if you don't want to save the changes.

    The system tells you the changes have been completed.
14. Click **OK**.
15. Click on the **Close** button.

Activating/Deactivating a Tag in the Master List

The Activate/Deactivate button is used to tell the system which tags are available to be assigned. All tags are active by default. If a tag is active, it appears in the list and can be assigned to an account or vehicle. If a tag is deactivated, it will not appear in the list of tags. You cannot delete a tag from the system, so the Deactivate button is used to "delete" a tag from the list of tags so users can't assign it. You can then re-activate the tag at a later date if necessary.

For example, there may be a system tag in the master list that you don't want to use at your dealership. You can deactivate this tag, which will remove it from the list and users won't be able to assign it to accounts. However, if you decide to use that tag at a later date, you can activate the tag to use it.

Complete the following steps to deactivate or activate a tag in the master list.

1. From the Autostar for Windows Home Page, click on **System Utilities**.
2. Click on **Lookup Maintenance**.
3. Click on **Tag Codes Maintenance**.

   The Tag Codes Maintenance screen appears.
4. In the table on the left side of the screen, scroll to select the tag you want to activate/deactivate. Click on the tag.
5. Click on the **Edit** button.

   Note: You can also double-click on the tag to access editing mode.
6. If the tag is active, click on the **DeActivate** button. If the tag is not active, click on the **Activate** button. The Activate/DeActivate button changes depending on the status of the tag.

Note: All tags are active by default. When a tag is inactive, a red button on the upper right-hand corner of the screen displays “Not Active.”

7. Click on the **Save** button.

   The system asks you to verify the change in the tag.

8. Click **Yes** to save the changes. Click **No** if you don’t want to save the changes.
9. Click **OK**.
10. Click **Close**.

Printing a List of Tags

You can print a list of all tags in Autostar for Windows using the following steps.

1. From the Autostar for Windows Home Page, click on **System Utilities**.
2. Click on **Lookup Maintenance**.
3. Click on **Tag Codes Maintenance**.

   The Tag Codes Maintenance screen appears.

4. Click on **Print**.
5. Click on the printer icon.
6. Click on **OK**.
7. Click on the **Close** button.

Working With Tags in Inventory

Assigning a Tag to a Vehicle

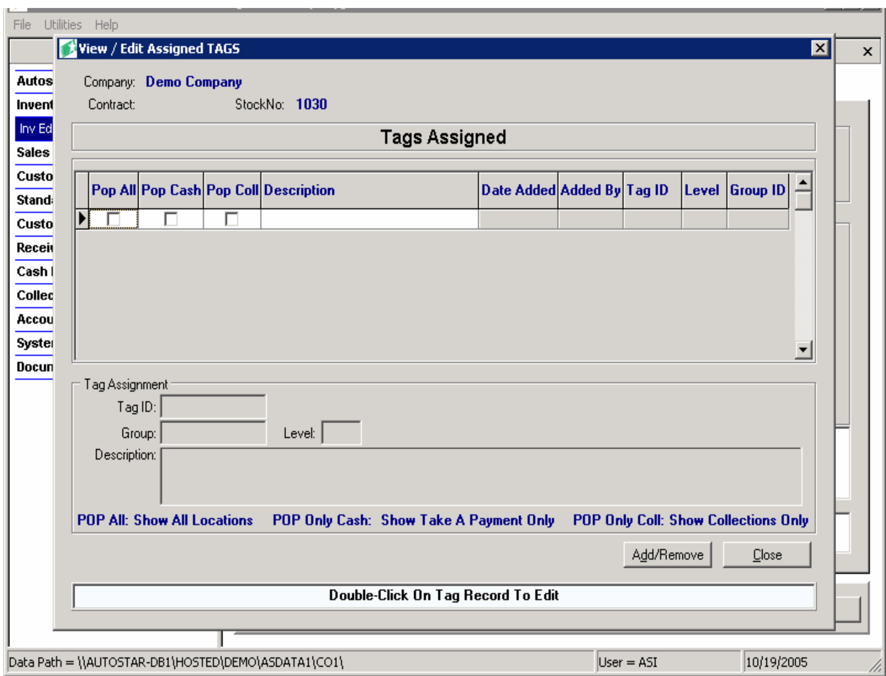
When you assign a tag to a vehicle in inventory, the tag stays attached to the vehicle record until the vehicle is sold. Once the vehicle is sold, the tag is attached to the account the vehicle is assigned to.

Complete the following steps to assign a tag to a vehicle.

1. From the Autostar for Windows Home Page, click on **Inventory**.
2. Click on **Maintain Vehicles in Inventory**
3. Use the search function to pull up the vehicle.
4. Click on the Inventory Menu **Options** button. 

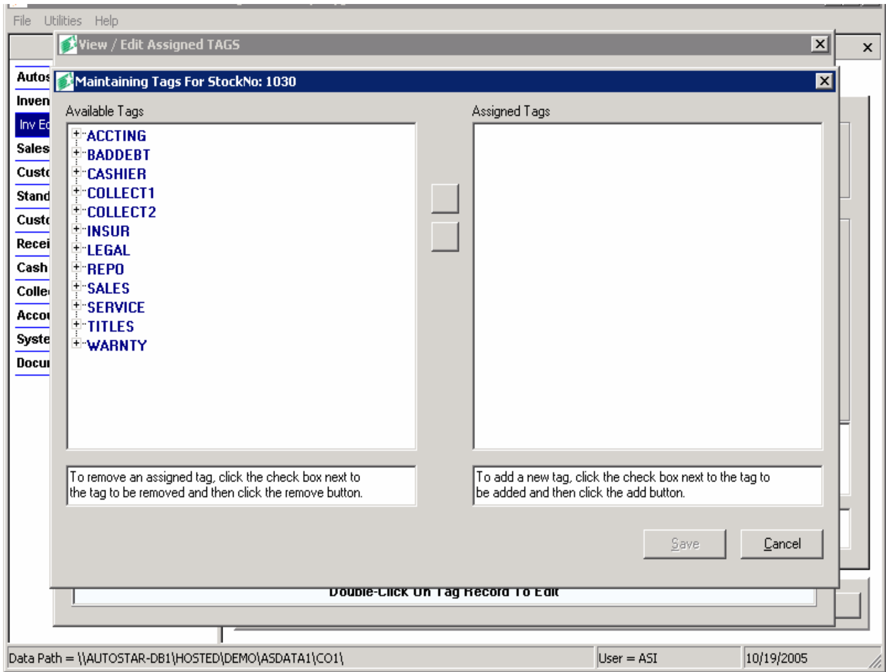
5. Click on **View Tags**.

   The View/Edit Assigned Tags screen appears.



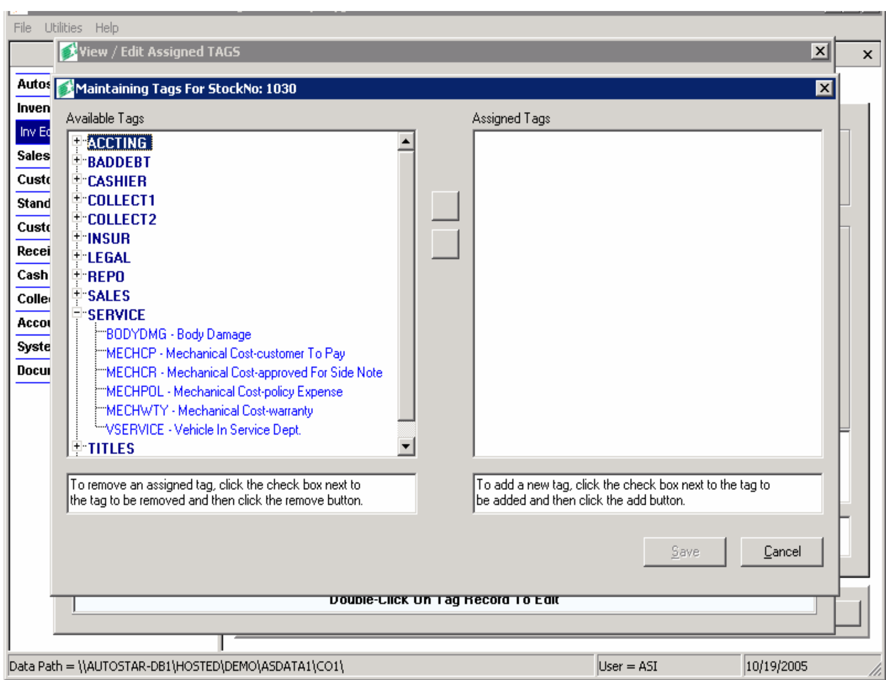
6. Click on the **Add/Remove** button.

The Maintaining Tags screen appears. The left side of the screen shows the available tag groups. The right side of the screen shows the tags assigned to the vehicle.



7. Click on the check box (+) next to the group that contains the tag you want to add.

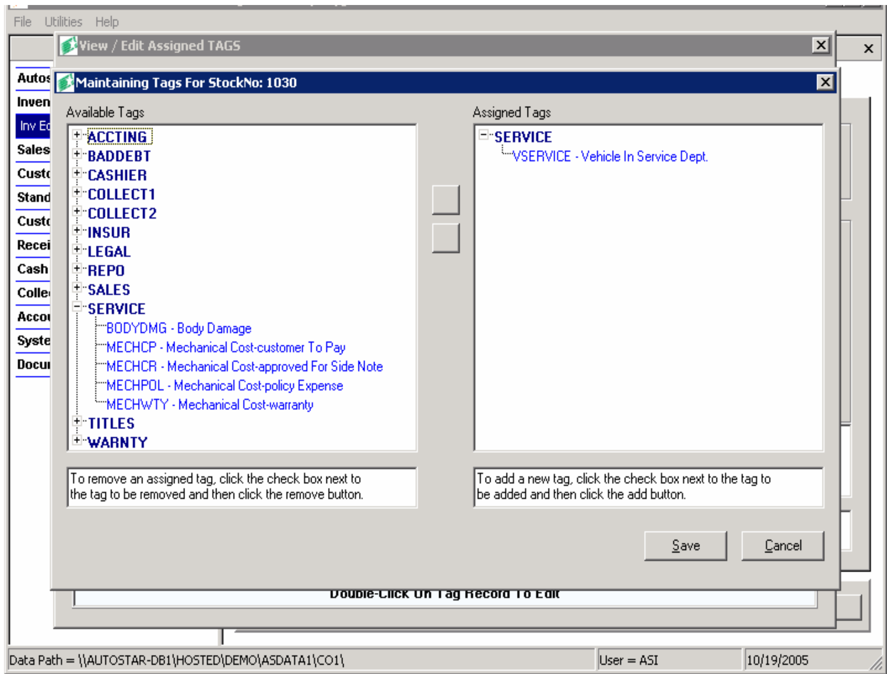
   The system displays the tags in that group. An example is shown in the screen below.



8. Double-click on the tag you want to assign to the vehicle.

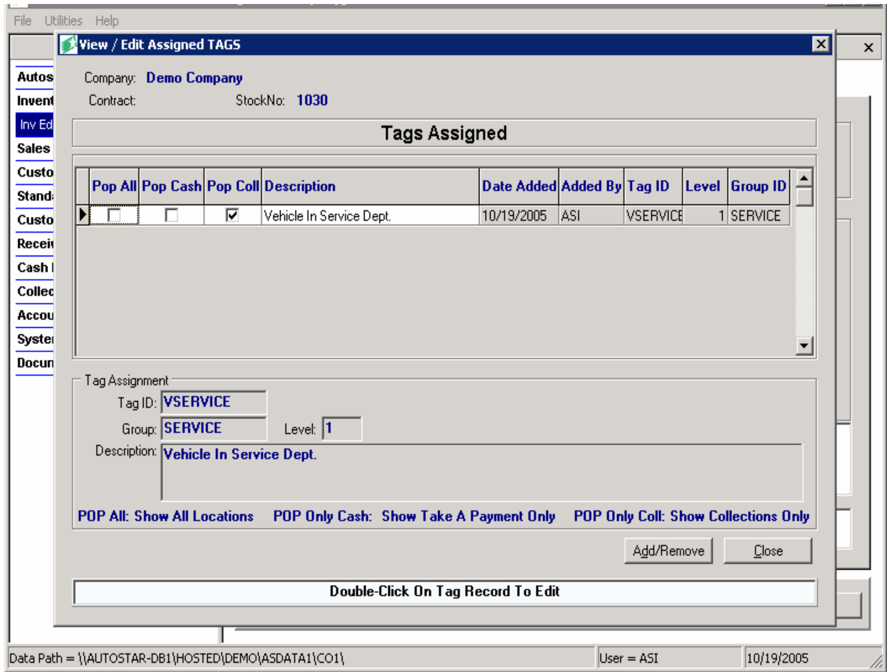
   Note: You can also click on the tag and then click on the add button, which is between the Available Tags box and the Assigned Tags box. This button will become active with a blue arrow pointing to the right when you click on a tag to add it.

   The tag you assigned appears in the Assigned Tags box on the right. The screen below shows an example.



9. Click on the **Save** button.

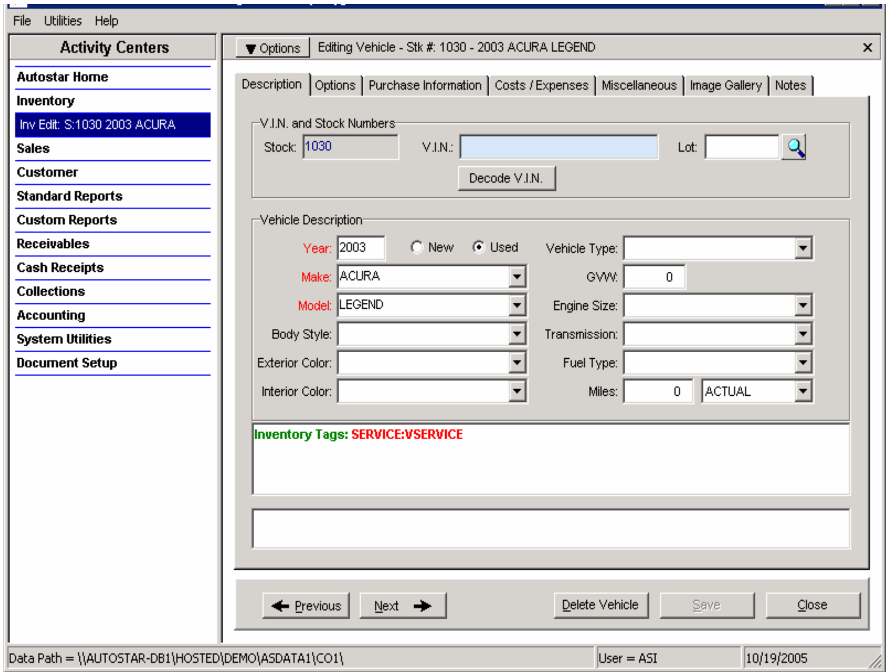
The system displays the tag assigned on the View/Edit screen.



10. From the View/Edit screen, you can tell the system where to display the tag. Double-click on **Pop All** to check the box if you want the tag to appear on all designated screens (e.g., Inventory, Sales Maintenance, Cashier, Collector). Leave this box empty if you don't want the tag to appear on all screens.
11. Double-click on **Pop Cash** to check the box if you want the tag to appear on Cashier screens only (i.e., Take a Payment and Payoff screens). Leave this box empty if you don't want the tag to appear on Cashier screens, or if you selected Pop All. The Pop All field will override this field.
12. Double-click on **Pop Coll** to check the box if you want the tag to appear on Collector screens only (Collections Lite and Collector Pro). Leave this box empty if you don't want the tag to appear on Collector screens, or if you selected Pop All. The Pop All field will override this field.
13. Click on **Close**.

    The system asks you to confirm the change.
14. Click on **Yes** to save the changes. Click on **No** if you don't want to save the changes.

The tag appears on the Inventory screen.



15. Click on **Close** to exit Inventory.

Editing a Tag Assigned to a Vehicle

From time to time, you may need to edit a tag. Once a tag has been added to a vehicle, you can only edit the tag description to make it more specific, or you can edit where the tags pop.

For example, you may want to edit the description of a tag to provide more specific information. If you had a vehicle being repaired that had a VSERVICE tag, you could edit the description to say "See Bob in body shop" to provide additional notes about the vehicle.

Complete the following steps to edit a tag assigned to a vehicle.

1. From the Autostar for Windows Home Page, click on **Inventory**.
2. Click on **Maintain Vehicles in Inventory**.
3. Use the search function to pull up the vehicle.
4. Click on the Inventory Menu **Options** button. 

5. Click on **View Tags**.

   The system displays the tags assigned.
6. Double-click on the tag you want to edit.

7. Edit the description for the tag in the Description field. The tag for this record will remain the same, but the description can be specific to this record only. The description you enter for this record will override the default description for this tag.
8. If necessary, edit the Pop check boxes to indicate which screens the tag should pop on.
9. Click on **Close**.

   The system asks if you want to save the changes.
10. Click on **Yes** to save the changes. Click on **No** to cancel the changes.
11. Click on the **Close** button to exit Inventory.

Removing a Tag from a Vehicle

Occasionally, you may need to remove a tag from a vehicle. For example, if you had a vehicle that was tagged for repairs, but now it's fixed, you can remove the repair tag.

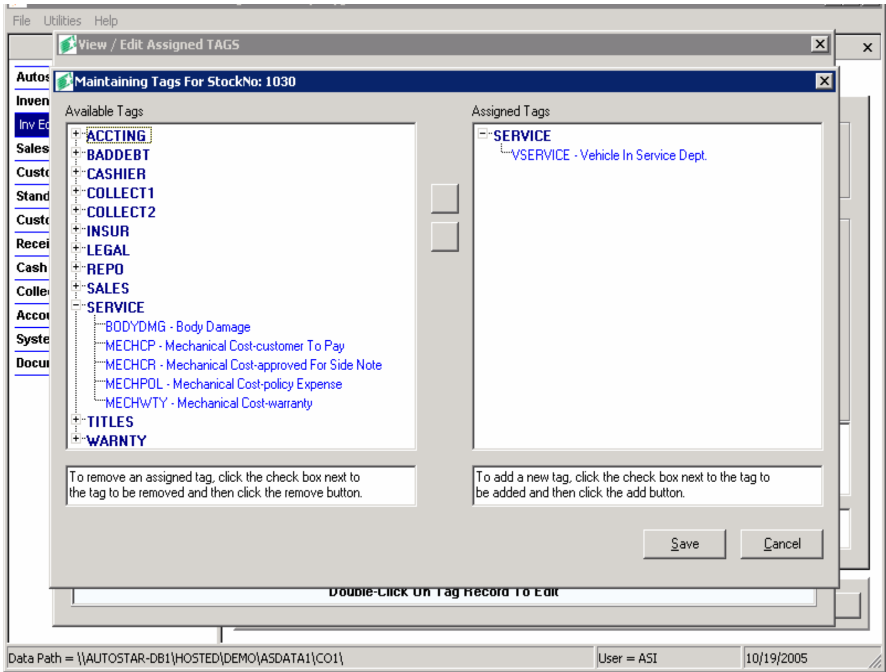
Complete the following steps to remove a tag assigned to a vehicle.

1. From the Autostar for Windows Home Page, click on **Inventory**.
2. Click on **Maintain Vehicles in Inventory**
3. Use the search function to pull up the vehicle.
4. Click on the Inventory Menu **Options** button. 

5. Click on **View Tags**.

   The View/Edit Assigned Tags screen appears.
6. Click on the **Add/Remove** button.

The Maintaining Tags screen appears. The left side of the screen shows the available tag groups. The right side of the screen shows the tags assigned to the vehicle.



7. In the Assigned Tags box on the right side of the screen, double-click on the tag you want to remove. Make sure you click on the tag and not the group.

   Note: You can also click on the tag and then click on the remove button, which is between the Available Tags box and the Assigned Tags box. This button will become active with a blue arrow pointing to the left when you click on a tag to remove it.

   The tag is removed from the vehicle.

8. Click on the **Save** button.

   The system displays the changes on the View/Edit screen.

9. Click on the **Close** button to exit the Tag screen.

10. Click on the **Close** button to exit Inventory.

Working with Tags in Sales

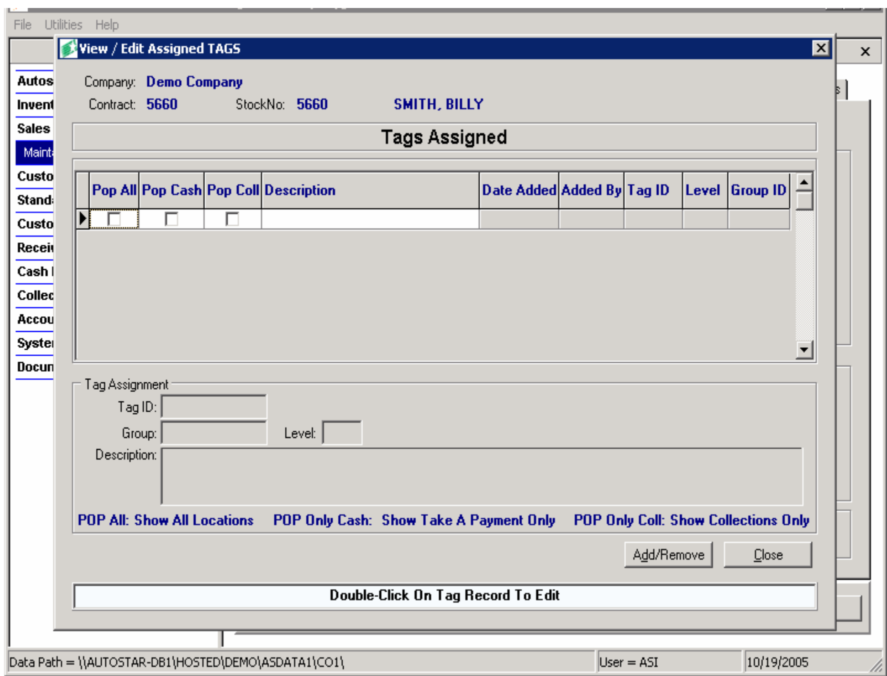
Assigning a Tag to a Past Sale

You can assign tags to an account once the sale is completed. Complete the following steps to assign a tag to a past sale.

1. From the Autostar for Windows Home Page, click on **Sales**.
2. Click on **Maintain Past Sales**.
3. Use the search function to pull up the account.
4. Click on the **Stock #** button (Maintain Past Sales Menu). 

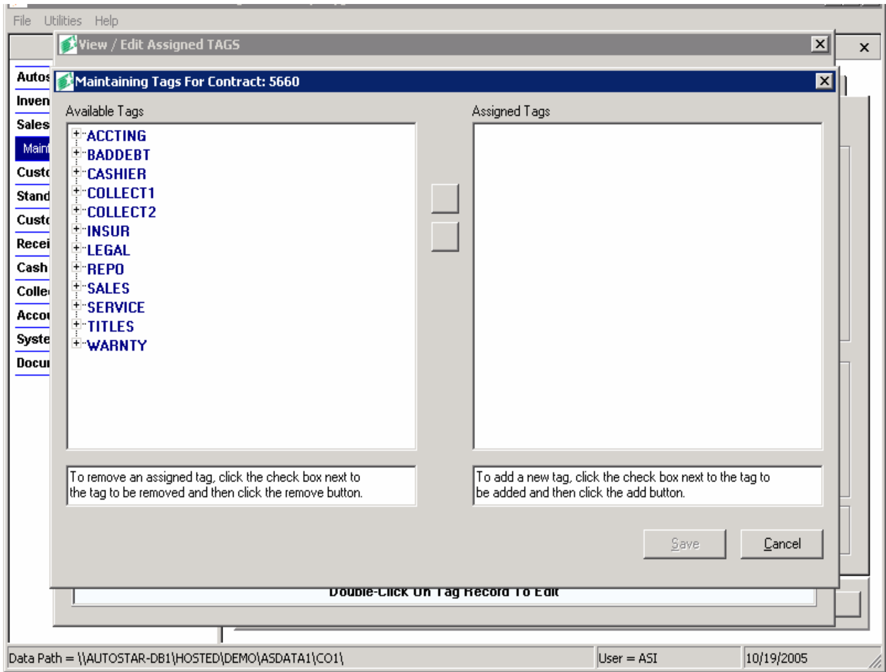
5. Click on **View Tags/Flags**.

   The View/Edit Assigned Tags screen appears.



6. Click on the **Add/Remove** button.

The Maintaining Tags screen appears. The left side of the screen shows the available tag groups. The right side of the screen shows the tags assigned to the account.



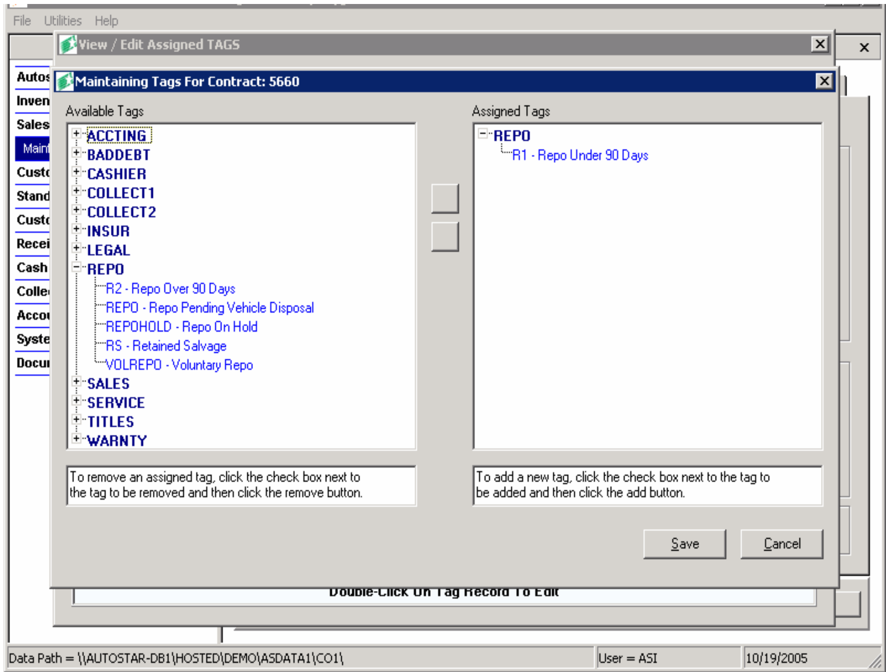
7. Click on the check box (+) next to the group that contains the tag you want to add.

   The system displays the tags in that group.

8. Double-click on the tag you want to assign to the account.

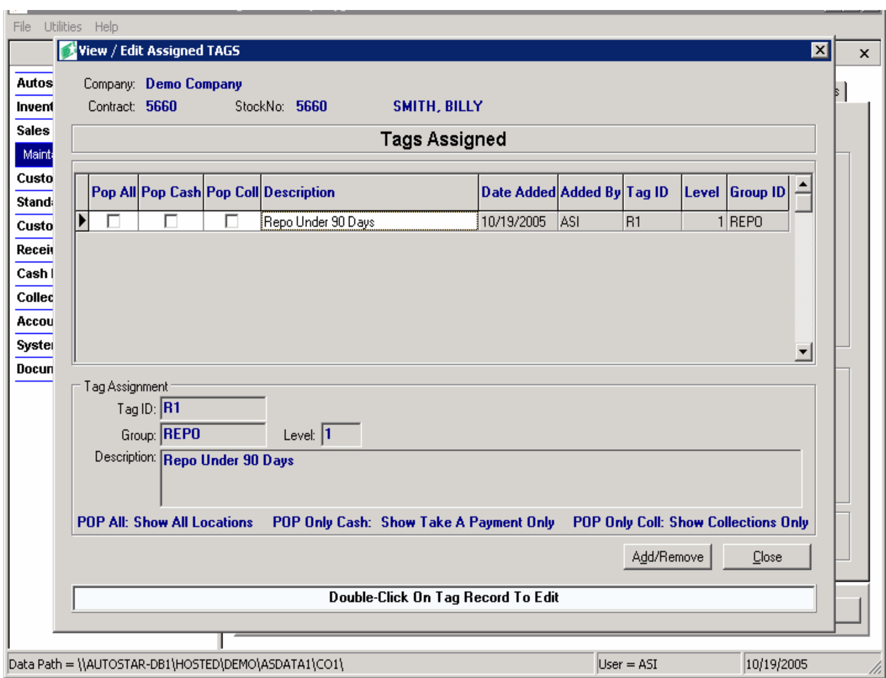
   Note: You can also click on the tag and then click on the add button, which is between the Available Tags box and the Assigned Tags box. This button will become active with a blue arrow pointing to the right when you click on a tag to add it.

The tag you assigned appears in the Assigned Tags box on the right. The screen below shows an example.



9. Click on the **Save** button.

   The system displays the tag assigned on the View/Edit screen.

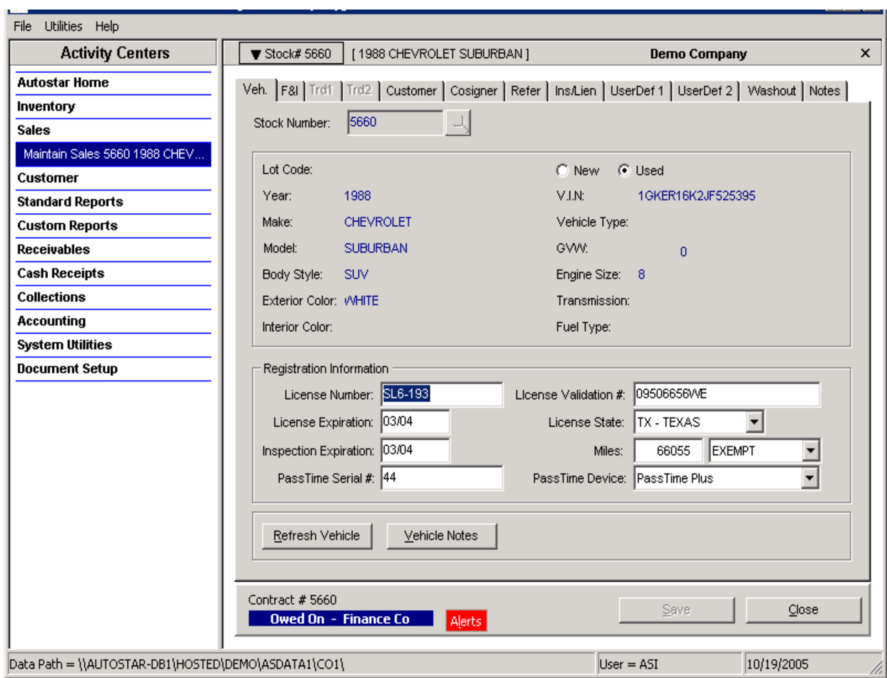


10. From the View/Edit screen, you can tell the system where to display the tag. Double-click on **Pop All** to check the box if you want the tag to appear on all designated screens (e.g., Inventory, Sales Maintenance, Cashier, Collector). Leave this box empty if you don't want the tag to appear on all screens.
11. Double-click on **Pop Cash** to check the box if you want the tag to appear on Cashier screens (i.e., Take a Payment and Payoff screens). Leave this box empty if you don't want the tag to appear on Cashier screens, or if you selected Pop All. The Pop All field will override this field.
12. Double-click on **Pop Coll** to check the box if you want the tag to appear on Collector screens (Collections Lite and Collections Pro). Leave this box empty if you don't want the tag to appear on Collector screens, or if you selected Pop All. The Pop All field will override this field.
13. Click on **Close**.

    The system asks you to confirm the changes.

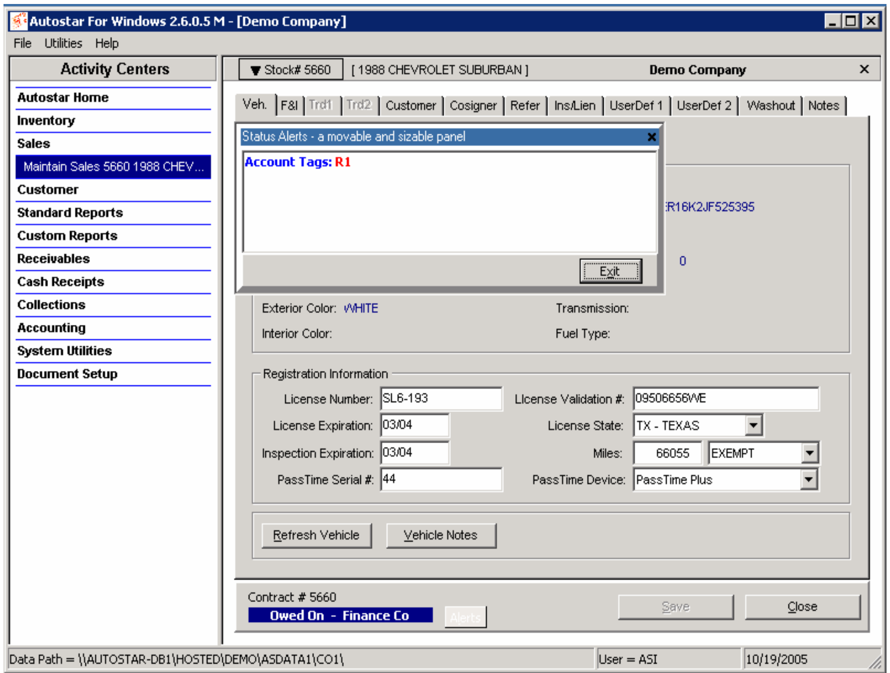
14. Click on **Yes** to save the changes. Click on **No** to cancel the changes.

    The Alerts button appears on the Sales screen, indicating there's a tag on the account.



15. Click on the **Alerts** button to view the tags assigned to the account.

The system displays the tags screen. You can move and size this window. The screen below shows an example of a tag screen.



16. Click on **Exit** to exit the tag window.
17. Click on **Close** to exit Sales Maintenance.

Editing a Tag Assigned to an Account

From time to time, you may need to edit a tag. Once a tag has been added to an account, you can only edit the tag description to make it more specific, or you can edit where the tag pops.

For example, you may want to edit the description of a tag to provide more specific information. If you had an account that had a LOW BALANCE tag, you could edit the description to say “payoff due in one month” to provide additional notes about the account. Then you could use this information to run a report showing customers with payoffs coming up soon.

Complete the following steps to edit a tag assigned to an account.

1. From the Autostar for Windows Home Page, click on **Sales**.
2. Click on **Maintain Past Sales**.
3. Use the search function to pull up the account.
4. Click on the **Stock #** button (Maintain Past Sales Menu). 

5. Click on **View Tags/Flags**.
6. Double-click on the tag you want to edit.

7. Edit the description for the tag in the Description field. The tag for this record will remain the same, but the description can be specific to this record only. The description you enter for this record will override the default description for this tag.
8. If necessary, edit the Pop check boxes to indicate which screens the tag should pop on.
9. Click on **Close**.

   The system asks if you want to save the changes.
10. Click on **Yes** to save the changes. Click on **No** to cancel the changes.
11. Click on **Close** to exit Sales Maintenance.

Removing a Tag from an Account

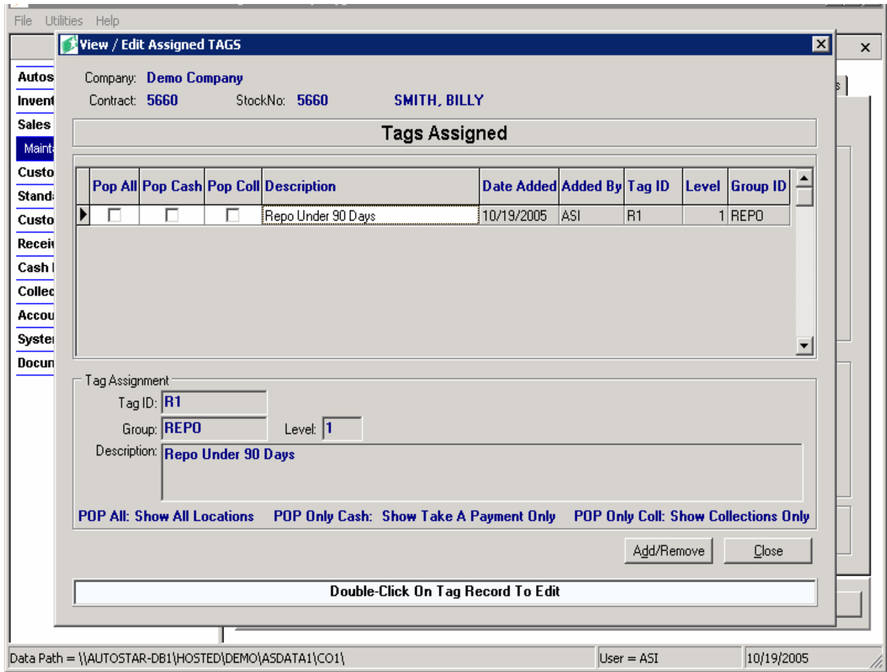
Occasionally, you may need to remove a tag from an account. For example, if you had an account that was tagged for low balance, but now the customer has paid off the vehicle, you can remove the tag.

Complete the following steps to remove a tag assigned to an account.

1. From the Autostar for Windows Home Page, click on **Sales**.
2. Click on **Maintain Past Sales**.
3. Use the search function to pull up the account.
4. Click on the **Stock #** button (Sales Option Menu). 

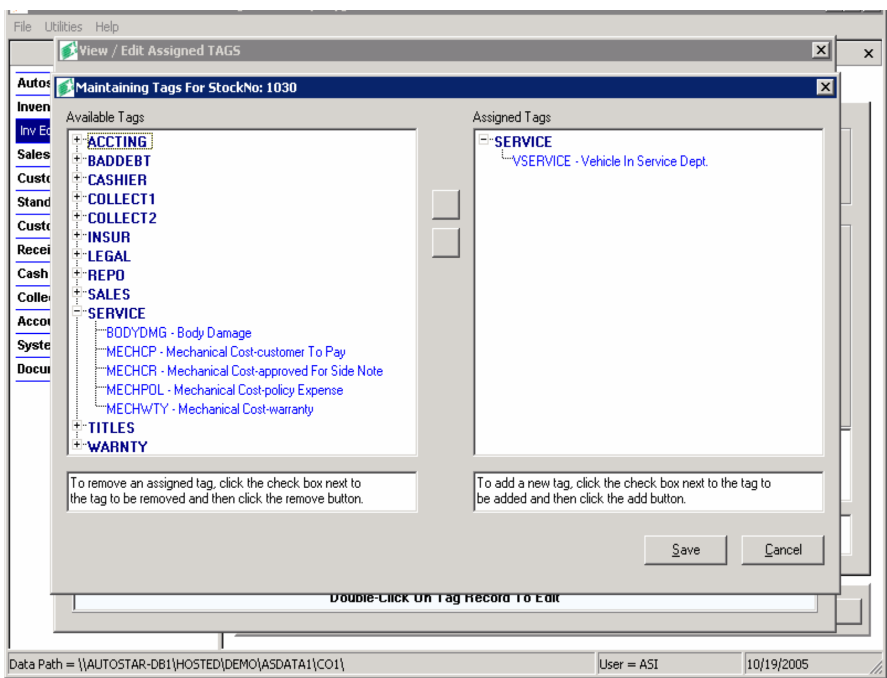
5. Click on **View Tags/Flags**.

The View/Edit Assigned Tags screen appears.



6. Click on the **Add/Remove** button.

   The Maintaining Tags screen appears. The left side of the screen shows the available tag groups. The right side of the screen shows the tags assigned to the vehicle.



7. In the Assigned Tags box on the right side of the screen, double-click on the tag you want to remove.

   Note: You can also click on the tag and then click on the remove button, which is between the Available Tags box and the Assigned Tags box. This button will become active with a blue arrow pointing to the left when you click on a tag to remove it.

   The tag is removed from the vehicle.

8. Click on the **Save** button.

   The system displays the changes on the View/Edit screen.

9. Click on **Close** to exit the Tag screen.

10. Click on **Close** to exit Sales Maintenance.

Working with Tags on Cashier Screens

You can view, assign, edit, and remove tags from accounts on the following Cashier screens:

- Take a Payment
- Contract Write Off
- Contract Pay Off
- Add Side Note

You can also designate which screens you want tags to pop on. Refer to the appropriate section for more information on working with tags on Cashier screens.

Assigning a Tag to an Account

You can assign a tag to an account from the Cashier screens listed above. For example, you can assign TAG READY to an account so that this information will pop on the screen when the customer comes in to make a payment and the cashier can tell him.

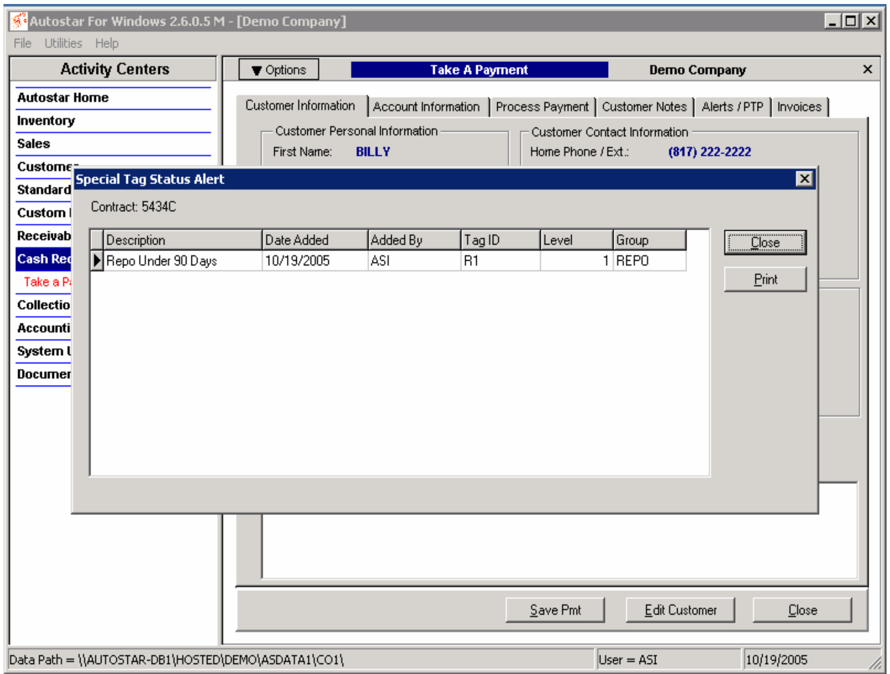
Complete the following steps to assign a tag to an account.

1. From the Autostar for Windows Home Page, click on **Cash Receipts**.
2. Click on **Take a Payment**.

Note: You can also assign a tag from the other screens listed above using this same process. Select the screen you're using instead of the Take a Payment screen and complete the remaining steps.

3. Use the search function to pull up the account.

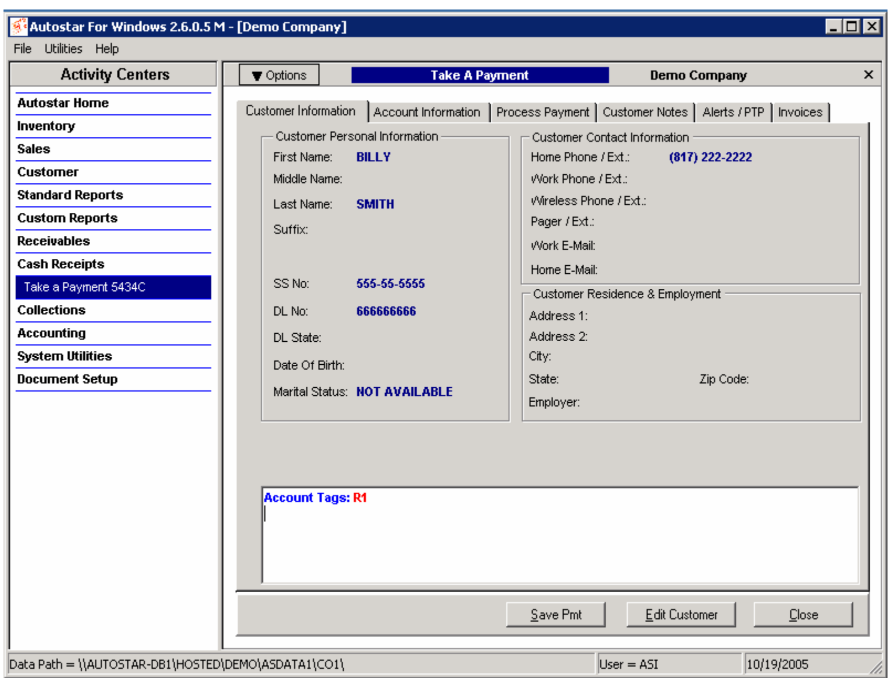
If there's a tag assigned to the account, a Special Tag Status Alert screen pops. The screen below shows an example.



4. Click on the **Close** button.

Note: You can click on the **Print** button if you want to print the alert.

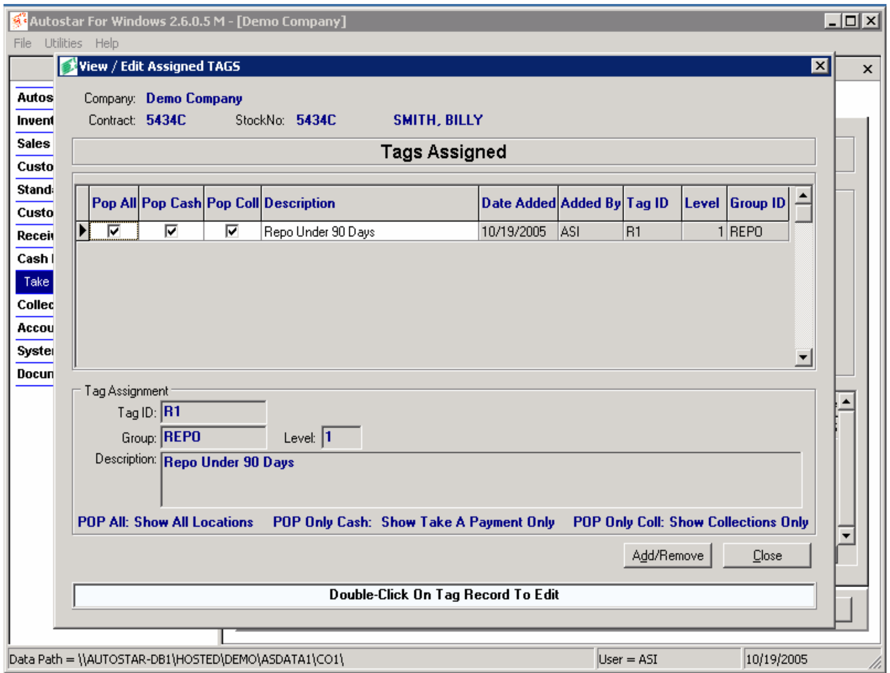
The system displays the account screen. The tags on the account appear in the window at the bottom of the screen.



5. Click on the **Options** Menu button. 

6. Click on **View Tags**.

   The View/Edit Assigned Tags screen appears. The tags on the account appear on the screen.



7. Click on the **Add/Remove** button.

   The Maintaining Tags screen appears. The left side of the screen shows the available tag groups. The right side of the screen shows the tags assigned to the account.

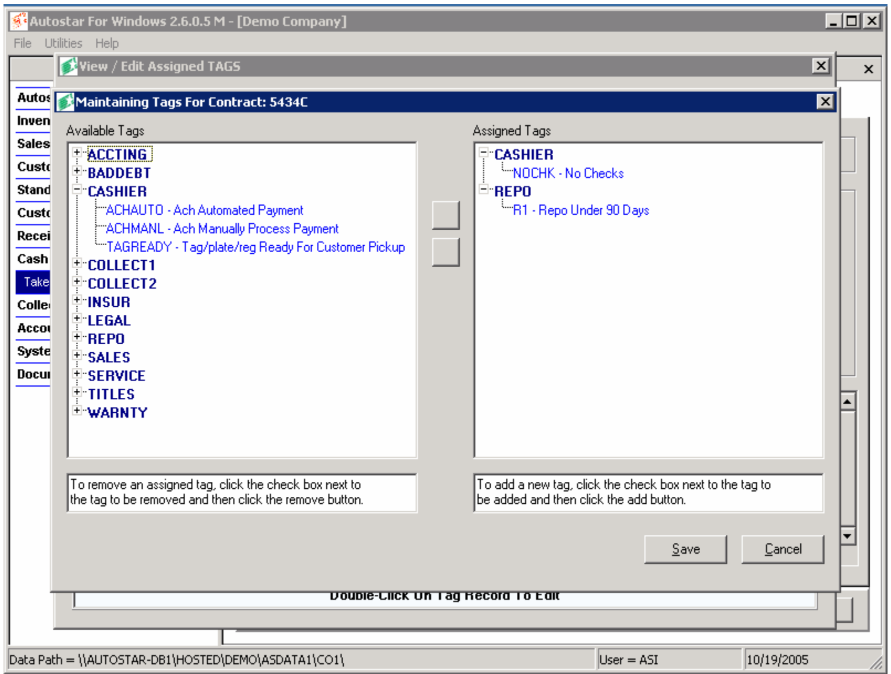
8. Click on the check box (+) next to the group that contains the tag you want to add.

   The system displays the tags in that group.

9. Double-click on the tag you want to assign to the account.

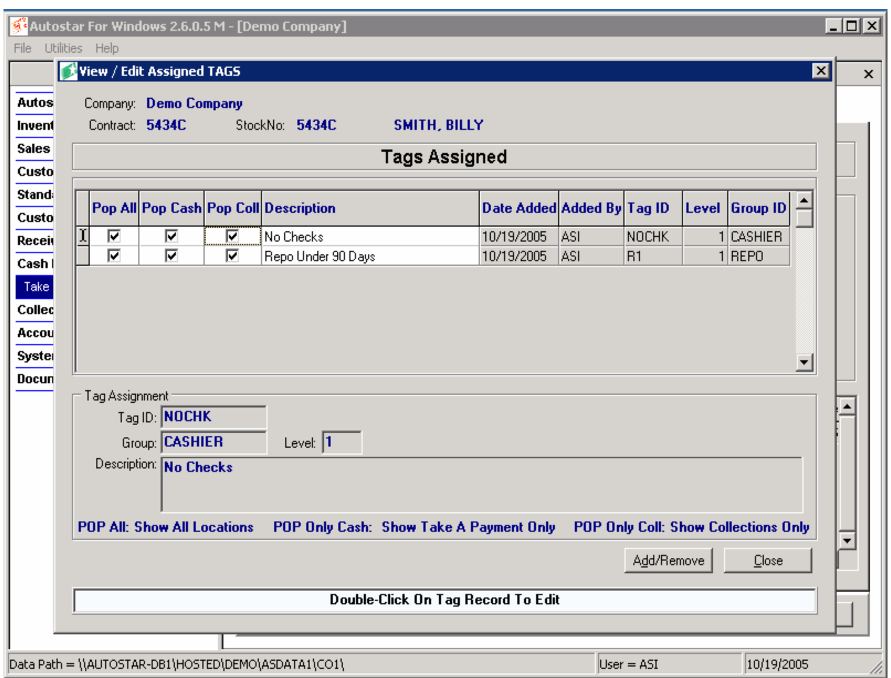
   Note: You can also click on the tag and then click on the add button, which is between the Available Tags box and the Assigned Tags box. This button will become active with a blue arrow pointing to the right when you click on a tag to add it.

The tag you assigned appears in the Assigned Tags box on the right. The screen below shows an example.



10. Click on the **Save** button.

The system displays the tags assigned on the View/Edit screen.



11. From the View/Edit screen, you can tell the system where to display the tag. Double-click on **Pop All** to check the box if you want the tag to appear on all designated screens (e.g., Inventory, Sales Maintenance, Cashier, Collector). Leave this box empty if you don't want the tag to appear on all screens.
12. Double-click on **Pop Cash** to check the box if you want the tag to appear on Cashier screens (i.e., Take a Payment and Payoff screens). Leave this box empty if you don't want the tag to appear on Cashier screens, or if you selected Pop All. The Pop All field will override this field.
13. Double-click on **Pop Coll** to check the box if you want the tag to appear on Collector screens (Collections Lite and Collections Pro). Leave this box empty if you don't want the tag to appear on Collector screens, or if you selected Pop All. The Pop All field will override this field.
14. Click on **Close**.

    The system asks you to confirm the changes.

15. Click on **Yes** to save the changes. Click on **No** to cancel the changes.

    The tag appears on the bottom of the Take a Payment screen.

16. Click on **Close** to exit Take a Payment.

Editing a Tag Assigned to an Account

From time to time, you may need to edit a tag. Once a tag has been added to an account, you can only edit the tag description to make it more specific, or you can edit where the tag pops.

For example, you may want to edit the description of a tag to provide more specific information. If you had an account that had a TAG READY tag, you could edit the description to say "called customer to tell them vehicle tags ready" to provide additional notes about the account.

Complete the following steps to edit a tag assigned to an account.

1. From the Autostar for Windows Home Page, click on **Cash Receipts**.
2. Click on **Take a Payment**.

Note: You can also assign a tag from the other screens listed above using this same process. Select the screen you're using instead of the Take a Payment screen and complete the remaining steps.

3. Use the search function to pull up the account.
4. Click on the **Options** Menu button. 

5. Click on **View Tags**.
6. Double-click on the tag you want to edit.

7. Edit the description for the tag in the Description field. The tag for this record will remain the same, but the description can be specific to this record only. The description you enter for this record will override the default description.
8. If necessary, edit the Pop check boxes to indicate which screens the tag should pop on.
9. Click on **Close**.

   The system asks if you want to save the changes.
10. Click on **Yes** to save the changes. Click on **No** to cancel the changes.
11. Click on the **Close** button to exit Take a Payment.

Removing a Tag from an Account

Occasionally, you may need to remove a tag from an account. For example, if you added a TAG READY tag to an account, then you would remove the tag once the customer picks up the tags.

Complete the following steps to remove a tag assigned to an account.

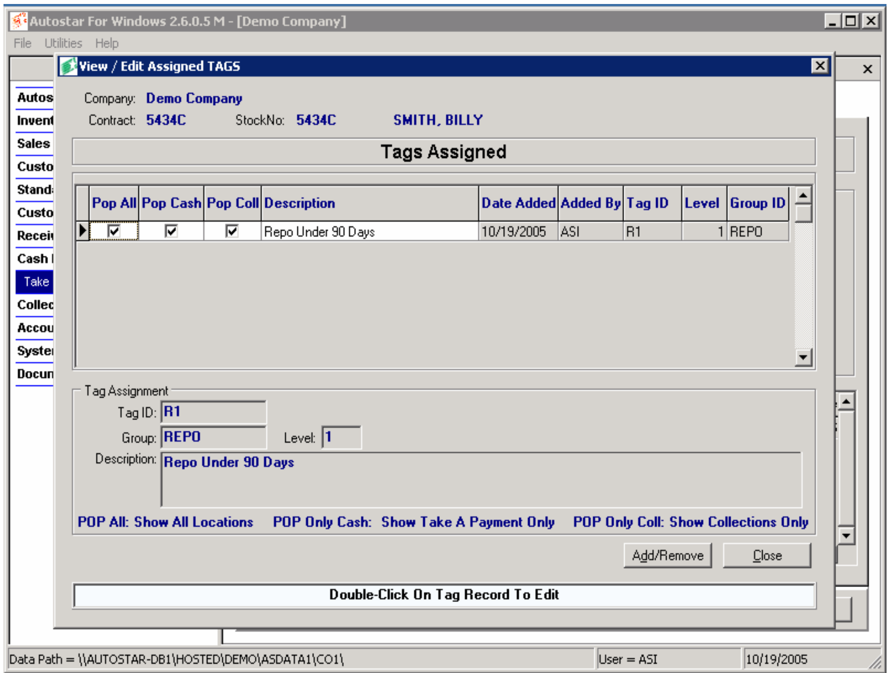
1. From the Autostar for Windows Home Page, click on **Cash Receipts**.
2. Click on **Take a Payment**.

Note: You can also assign a tag from the other screens listed above using this same process. Select the screen you're using instead of the Take a Payment screen and complete the remaining steps.

3. Use the search function to pull up the account.
4. Click on the **Options** Menu button. 

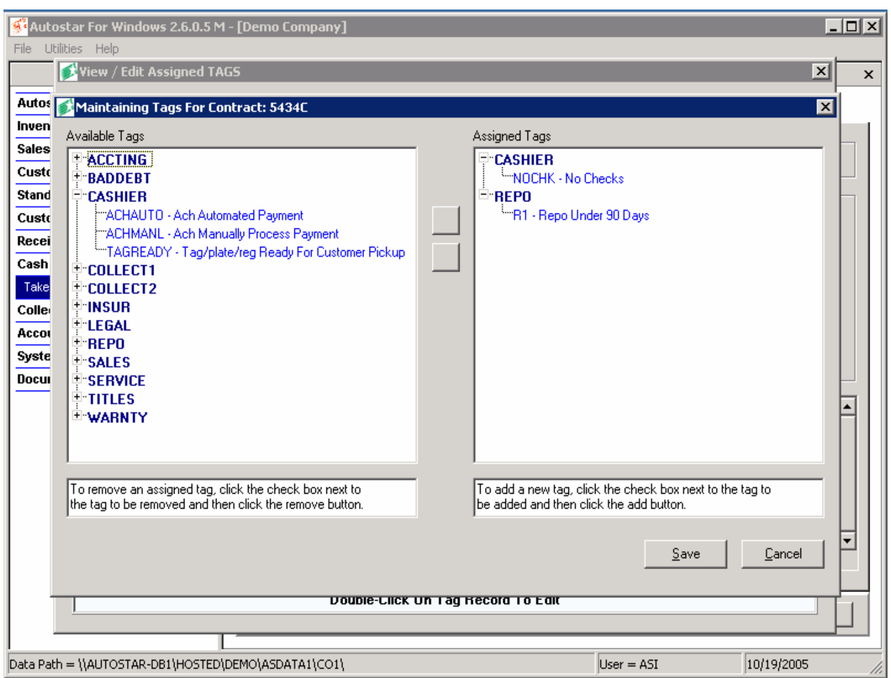
5. Click on **View Tags**.

The View/Edit Assigned Tags screen appears.



6. Click on the **Add/Remove** button.

   The Maintaining Tags screen appears. The left side of the screen shows the available tag groups. The right side of the screen shows the tags assigned to the vehicle.



7. In the Assigned Tags box on the right side of the screen, double-click on the tag you want to remove.

   Note: You can also click on the tag and then click on the remove button, which is between the Available Tags box and the Assigned Tags box. This button will become active with a blue arrow pointing to the left when you click on a tag to remove it.

   The tag is removed from the vehicle.

8. Click on the **Save** button.

   The system displays the changes on the View/Edit screen.

9. Click on **Close** to exit the Tag screen.
10. Click on **Close** to exit Cash Receipts.

Working with Tags in Collections Lite

You can view, assign, edit, and remove tags from accounts on Collections Lite and Collector Pro screens. You can also designate which screens you want tags to pop on. Refer to the appropriate section for more information on working with tags on Collector screens.

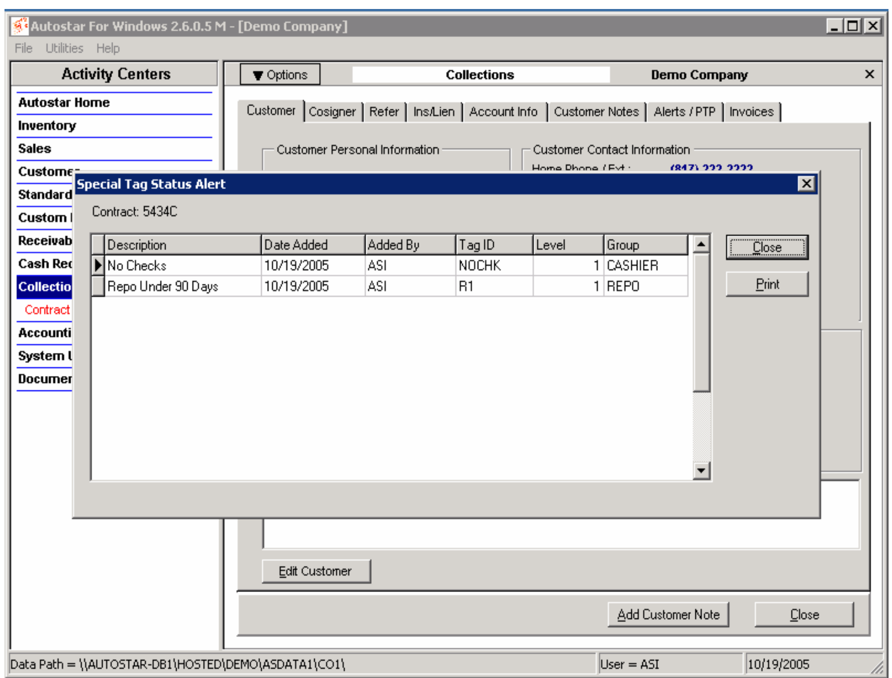
Assigning a Tag to an Account

You can assign a tag to an account from the Collections Lite screens. For example, you can assign a NO CALLS ON JOB tag to a customer's account so that this information will pop on the screen when a collector pulls up the account.

Complete the following steps to assign a tag to an account.

1. From the Autostar for Windows Home Page, click on **Collections**.
2. Click on **Contract Collections Lite**.
3. Use the search function to pull up the account.

   If there's a tag assigned to the account, a Special Tag Status Alert screen pops. The screen below shows an example.



4. Click on the **Close** button if necessary.

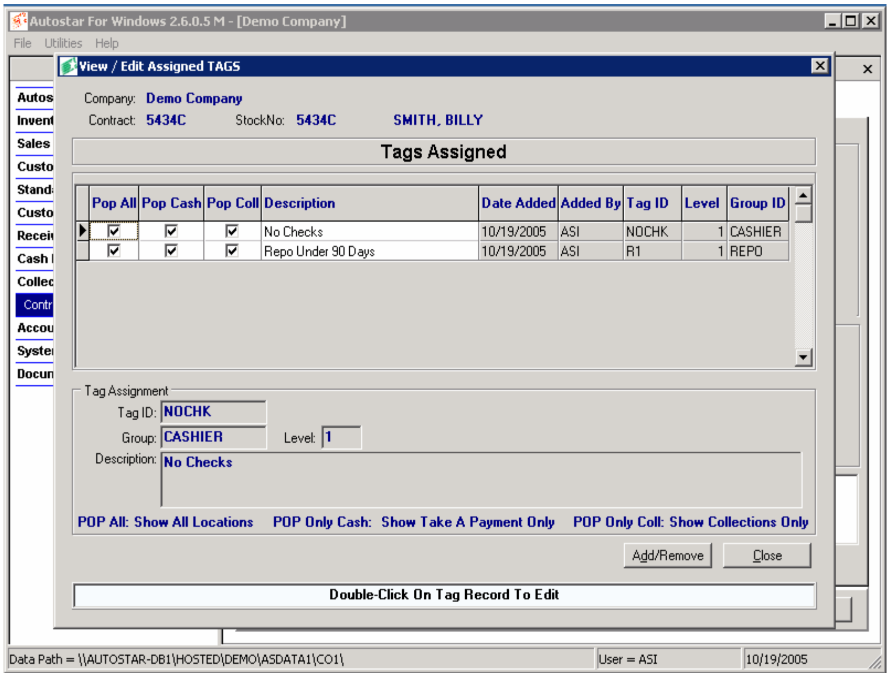
   Note: You can click on the **Print** button if you want to print the alert.

   The system displays the account screen. The tags on the account appear in the window at the bottom of the screen.

5. Click on the Collections Menu **Options** button. 

6. Click on **View Tags**.

   The View/Edit Assigned Tags screen appears. The tags on the account appear at the bottom of the screen.



7. Click on the **Add/Remove** button.

   The Maintaining Tags screen appears. The left side of the screen shows the available tag groups. The right side of the screen shows the tags assigned to the account.

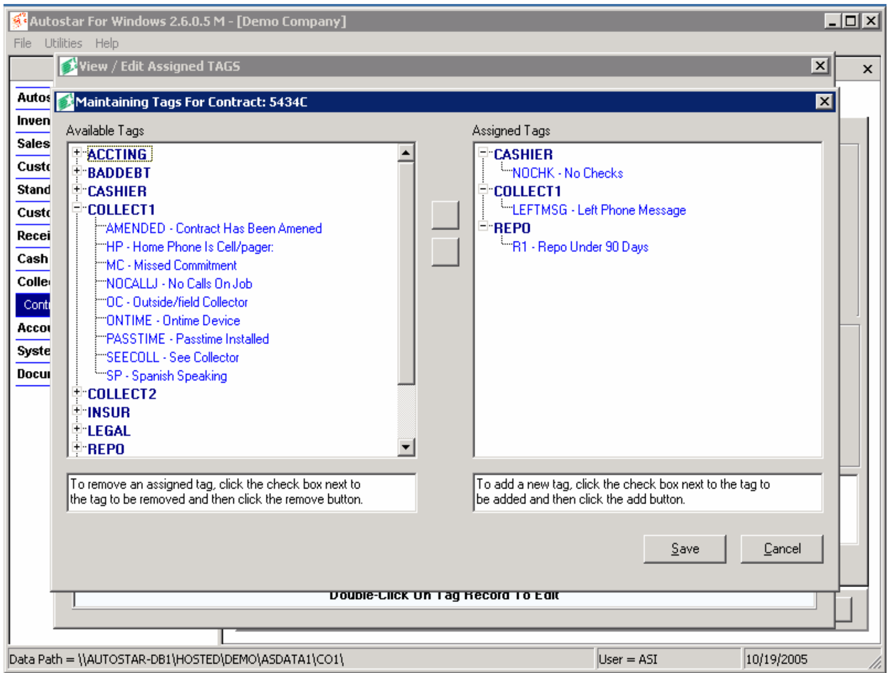
8. Click on the check box (+) next to the group that contains the tag you want to add.

   The system displays the tags in that group.

9. Double-click on the tag you want to assign to the account.

   Note: You can also click on the tag and then click on the add button, which is between the Available Tags box and the Assigned Tags box. This button will become active with a blue arrow pointing to the right when you click on a tag to add it.

The tag you assigned appears in the Assigned Tags box on the right. The screen below shows an example.



10. Click on the **Save** button.

    The system displays the tags assigned on the View/Edit screen.

11. From the View/Edit screen, you can tell the system where to display the tag. Double-click on **Pop All** to check the box if you want the tag to appear on all designated screens (e.g., Inventory, Sales Maintenance, Cashier, Collector). Leave this box empty if you don't want the tag to appear on all screens.

12. Double-click on **Pop Cash** to check the box if you want the tag to appear on Cashier screens (i.e., Take a Payment and Payoff screens). Leave this box empty if you don't want the tag to appear on Cashier screens, or if you selected Pop All. The Pop All field will override this field.

13. Double-click on **Pop Coll** to check the box if you want the tag to appear on Collector screens (Collections Lite and Collections Pro). Leave this box empty if you don't want the tag to appear on Collector screens, or if you selected Pop All. The Pop All field will override this field.

14. Click on **Close**.

    The tag appears on the Collections screen.

15. Click on **Close** to exit Collections Lite.

Editing a Tag Assigned to an Account

From time to time, you may need to edit a tag. Once a tag has been added to an account, you can only edit the tag description to make it more specific, or you can edit where the tag pops.

For example, you may want to edit the description of a tag to provide more specific information. If you had an account that had a NO CALLS ON JOB tag, you could edit the description to tell the collector the best time to call the customer when he's not at work.

Complete the following steps to edit a tag assigned to an account.

1. From the Autostar for Windows Home Page, click on **Collections**.
2. Click on **Contract Collections Lite**.
3. Use the search function to pull up the account.
4. Click on the **Options** Menu button. 

5. Click on **View Tags**.
6. Double-click on the tag you want to edit.
7. Edit the description for the tag in the Description field. The tag for this record will remain the same, but the description can be specific to this record only. The description you enter for this record will override the default description for this tag.
8. If necessary, edit the Pop check boxes to indicate which screens the tag should pop on.
9. Click on **Close**.

   The system asks if you want to save the changes.
10. Click on **Yes** to save the changes. Click on **No** to cancel the changes.
11. Click on the **Close** button to exit Collections.

Removing a Tag from an Account

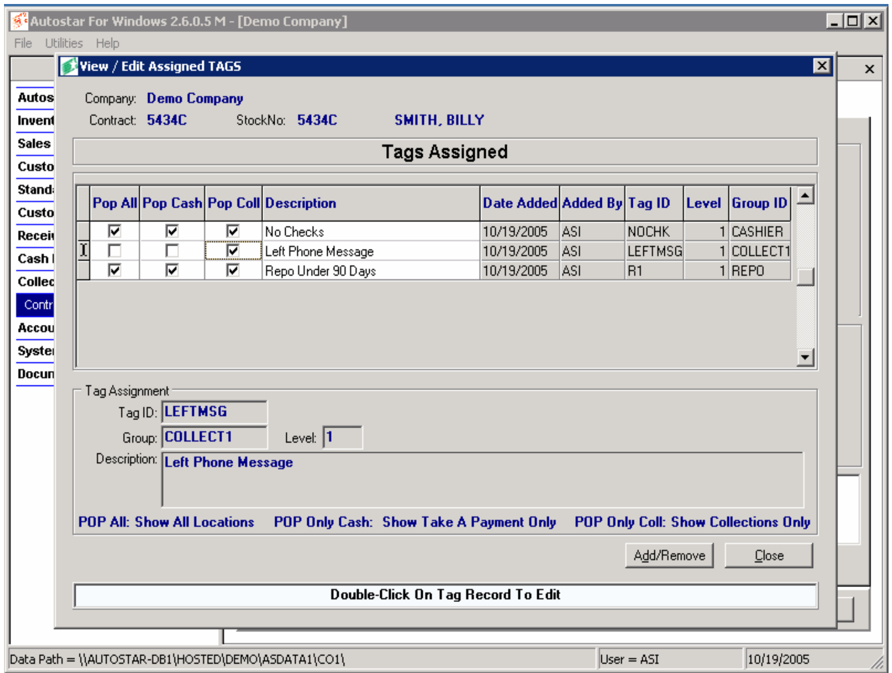
Occasionally, you may need to remove a tag from an account. For example, if you had an account that had a NO CALLS ON JOB tag and then the customer changed jobs, you could use this procedure to remove the tag from the account.

Complete the following steps to remove a tag assigned to an account.

1. From the Autostar for Windows Home Page, click on **Collections Lite**.
2. Use the search function to pull up the account.
3. Click on the **Options** Menu button. 

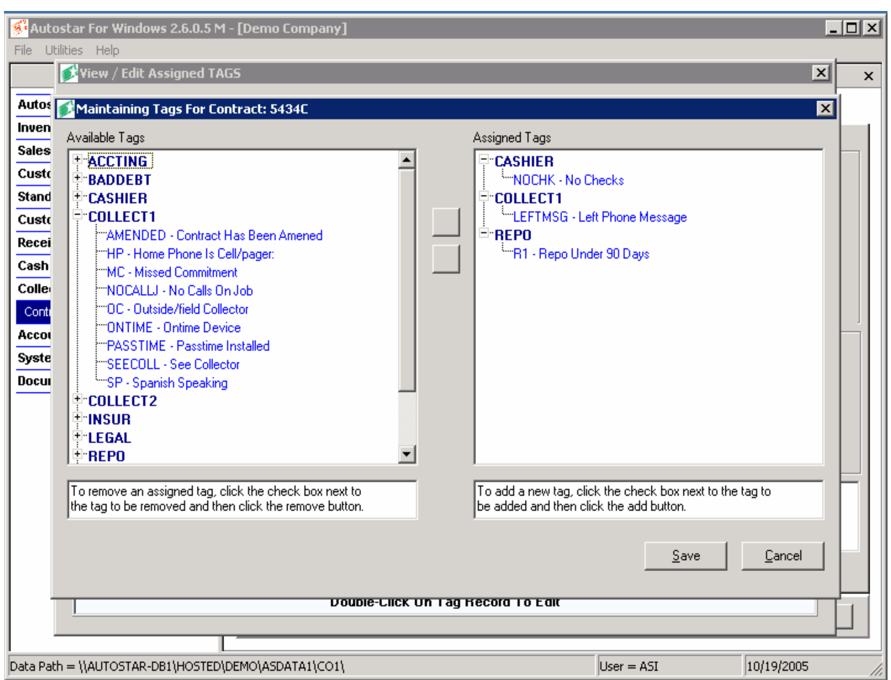
4. Click on **View Tags**.

The View/Edit Assigned Tags screen appears.



5. Click on the **Add/Remove** button.

   The Maintaining Tags screen appears. The left side of the screen shows the available tag groups. The right side of the screen shows the tags assigned to the vehicle.



6. In the Assigned Tags box on the right side of the screen, double-click on the tag you want to remove.

   Note: You can also click on the tag and then click on the remove button, which is between the Available Tags box and the Assigned Tags box. This button will become active with a blue arrow pointing to the left when you click on a tag to remove it.

   The tag is removed from the vehicle.

7. Click on the **Save** button.

   The system displays the changes on the View/Edit screen.

8. Click on **Close** to exit the Tag screen.
9. Click on **Close** to exit Collections Lite.

Using Tags with Autostar Reports

Tags can be used in two different ways with Autostar reports. Certain standard reports have a Tags Scoping tab that allows you to select the tags you want to scope by. In addition, Autostar has a group of Tag Reports that you can use to see vehicles and accounts with specific tags assigned to them. This section provides instructions for printing both kinds of reports.

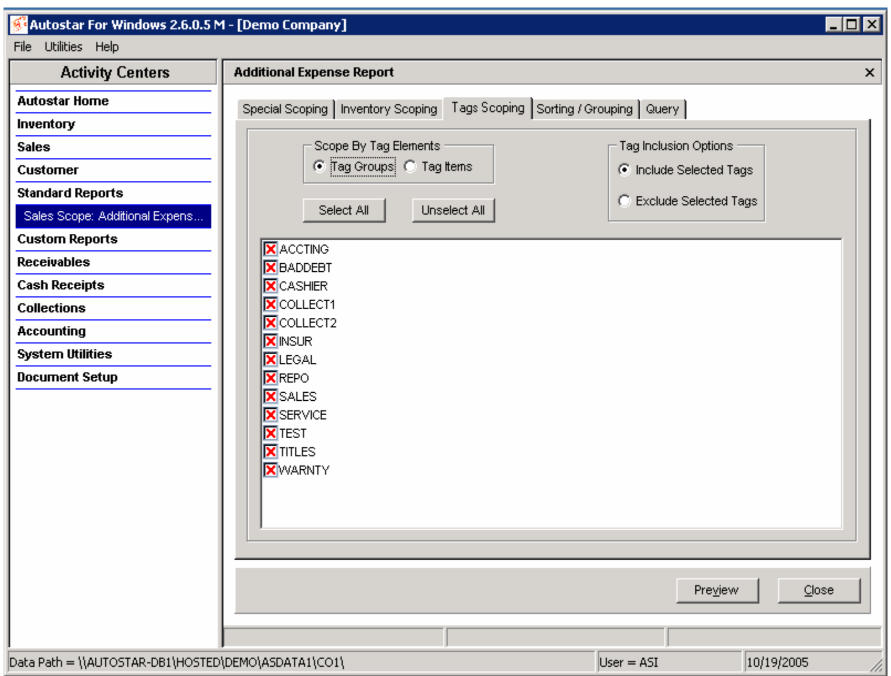
Using Tags to Run Standard Reports

1. From the Autostar for Windows Home Page, click on **Standard Reports**.
2. Click on the report you want to print.

Note: Not all reports have tag scoping available. Tag scoping can only be used on applicable vehicles and accounts.

3. If tags are available for the report, the Tags Scoping tab appears. Click on the **Tags Scoping** tab.

   The Tags Scoping screen appears.



4. In the Scope By Tag Elements field, select one of the following:
   - Click on **Tag Groups** if you want to sort the report by tag groups. The tag groups appear in the box below the field.
   - Click on **Tag Items** if you want to scope the report by tag items. The tag items appear in the box below the field.

5. Select one of the following:
   - Click on the **Select All** button to select all of the tags or groups shown in the box.
   - Click on **Unselect All** to deselect all of the tag items or groups in the box. Once you deselect all of the items, you can click on only the tags you want to include.
6. In the Tag Inclusion Options field select one of the following:
   - Click on **Include Selected Tags** if you want to include the selected tags in the report.
   - Click on **Exclude Selected Tags** if you don’t want to include the selected tags in the report.
7. Select all of your other sorting a scoping options for the report.
8. When you’ve selected your report criteria, click on **Preview**.
9. Click on the printer icon to print the report.
10. Click on **OK** to print.
11. Click on **Close** to exit the Report Activity Center.

Printing Tag Reports

Available in Future Release