10.20 Model Number Maintenance Accounts

Presenting the revamped Model Number Maintenance Accounts! We've streamlined the process of assigning accounts to specific model numbers by relocating Model Number Accounts from Deal Posting Templates to Model Number Maintenance. This adjustment aims to enhance accessibility and improve user-friendliness.

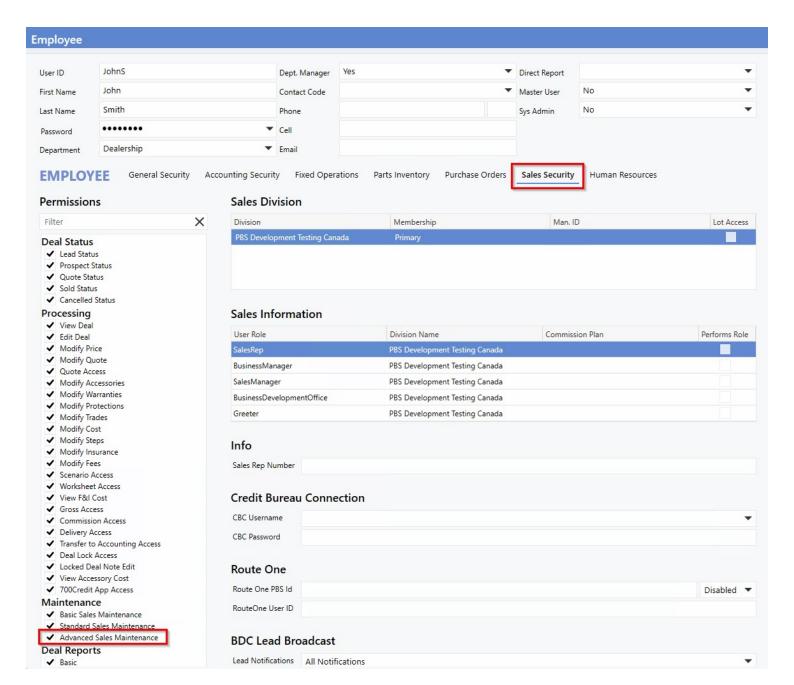
Introducing the new Model Number Maintenance Utilities window, offering an additional method for making changes! This feature provides unprecedented flexibility, allowing quick adjustments to the accounts model numbers are associated with. Moreover, when new model years are added, they will automatically inherit existing model accounts if any were attached to the previous model year.

Bid farewell to manual tasks and embrace a new era of automation! Read on to learn about this exciting feature!

User Security - Advanced Sales Maintenance Permission

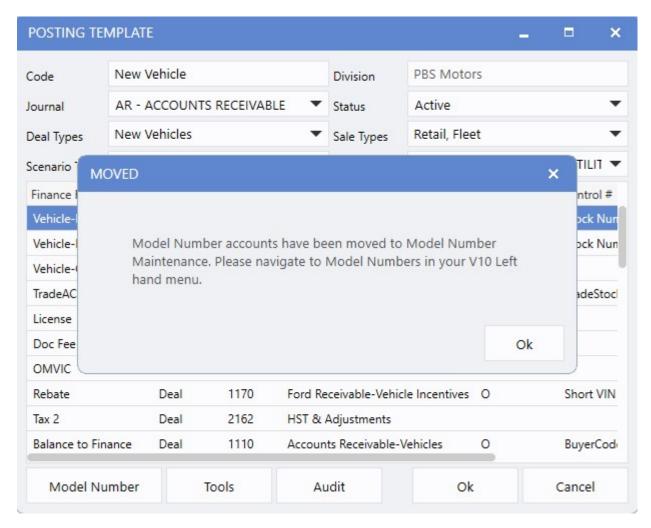
To modify Model Number accounts, Users must have the **Advanced Sales Maintenance** permission under the **Sales Security** tab of their User profile.

To access this permission, follow the path: **Employee > User Maintenance > Users > Select User > Sales Security tab > Maintenance section > Advanced Sales Maintenance**



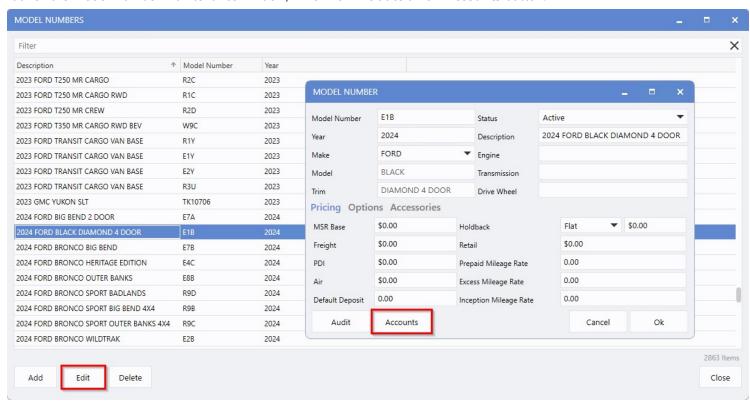
Posting Templates

Model Numbers accounts have been relocated from the Posting Templates. Users attempting to access it from there will receive a message notification.



Model Number Maintenance

In the Model Numbers window, you can access a Model Number by double-clicking or selecting the **Edit** button. This action will launch the Model Number Maintenance window, which now includes a new **Accounts** button.



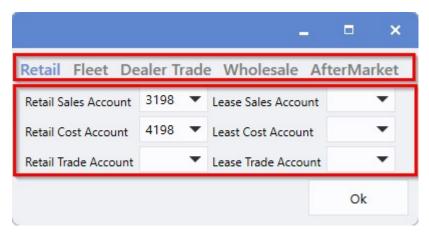
When Users click the Accounts button, they are prompted to choose a fuel type (if applicable) to proceed.



Afterward, they encounter a window where they can conveniently configure both **Retail Accounts** and **Lease Accounts** upon selecting a **Sale Type** (tabs across the top). This minimizes the need for numerous Deal posting templates, simplifying setups and streamlining the process. This capability empowers Users to manage accounts with precision and ease, thus enhancing productivity.

Select the drop-down menu for the accounts that require an Account number set.

To access this feature, follow the path: System > Vehicles > Maintenance > Vehicle Types > Model Numbers > Select Model Number

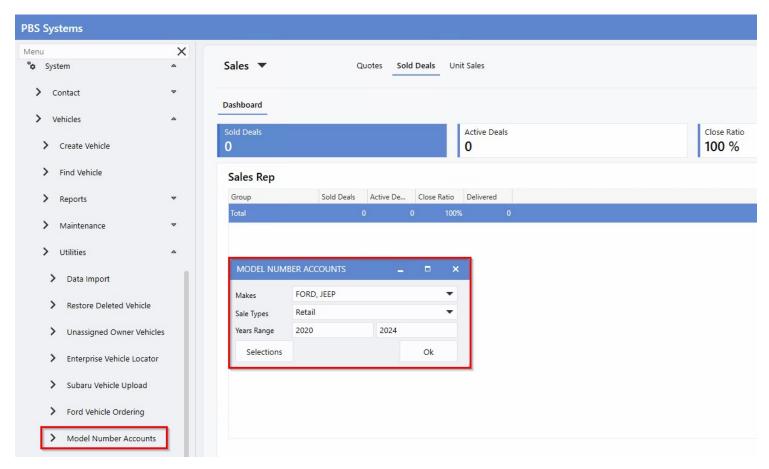


Model Number Utilities

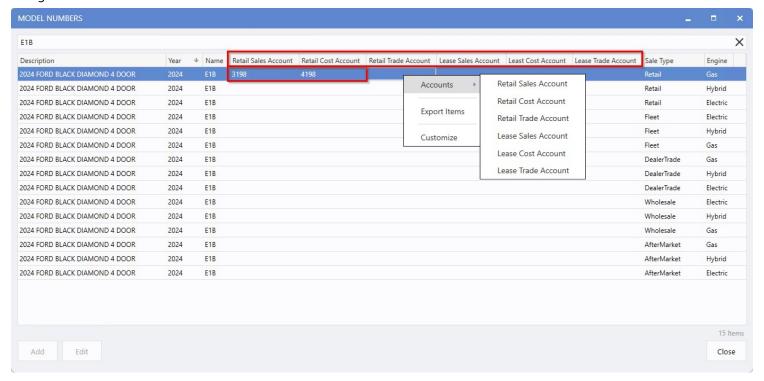
An alternate way to assign accounts to Model Numbers is through the newly introduced **Model Number Utilities** tool conveniently located in the left-hand menu. This window provides an easy way for Users to reassign accounts to different Models quickly. It is simple for Users to select various criteria such as **Make, Sale Type,** and **Year Range.** Whether you're looking to reallocate accounts for a specific Make within a certain sale type or across a range of years, this window provides the flexibility and efficiency you need to make seamless changes to Model accounts with ease. Additionally, Users will be able to select multiple Vehicle Model Numbers to update to the same account.

The **Selections** button is a convenient tool for creating, loading, and managing existing selection combinations. Users will find their workflow management significantly enhanced with the ability to save and optimize their selections.

To access this feature, follow the path: Vehicles > Utilities > Model Number Accounts

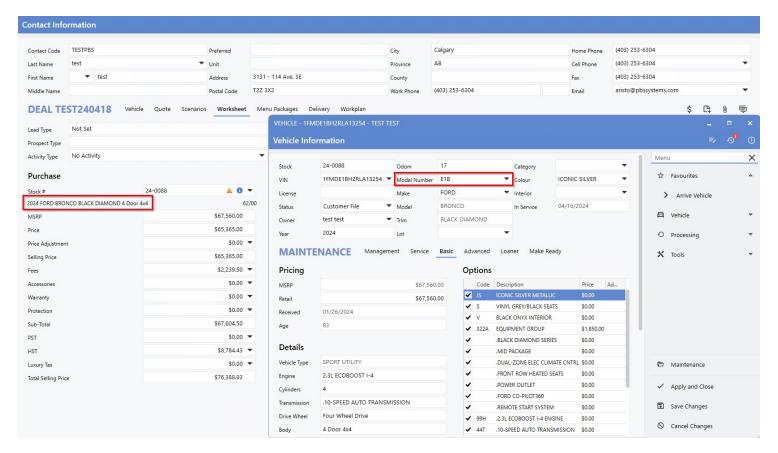


When selecting a model, Users can access the Accounts option by right-clicking. This functionality also grants access to features like exporting and customizing columns. After selecting account types, specific accounts can be searched by name in the search bar or filtered by account number or description. Once selected, the accounts will appear in the Model Numbers window alongside the chosen Vehicle.



Example - Deal Creation

In this example, the account numbers have been attached to the Vehicle Model, as demonstrated earlier. When the Deal is finalized, it is transferred to Accounting.



Example - Transfer to Accounting

Once the Deal psoting is opened in the Posting Tank, the accounts configured in the Model Number Maintenance, along with their associated information, populate automatically.

