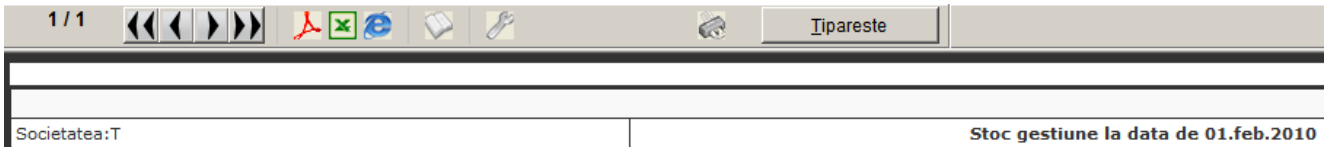
Trendix:
Integrated ERP system

DMS components of Trendix

- ✓ Parts management
- ✓ Workshop management
- ✓ Customer Relationship Management
- ✓ Vehicle sales

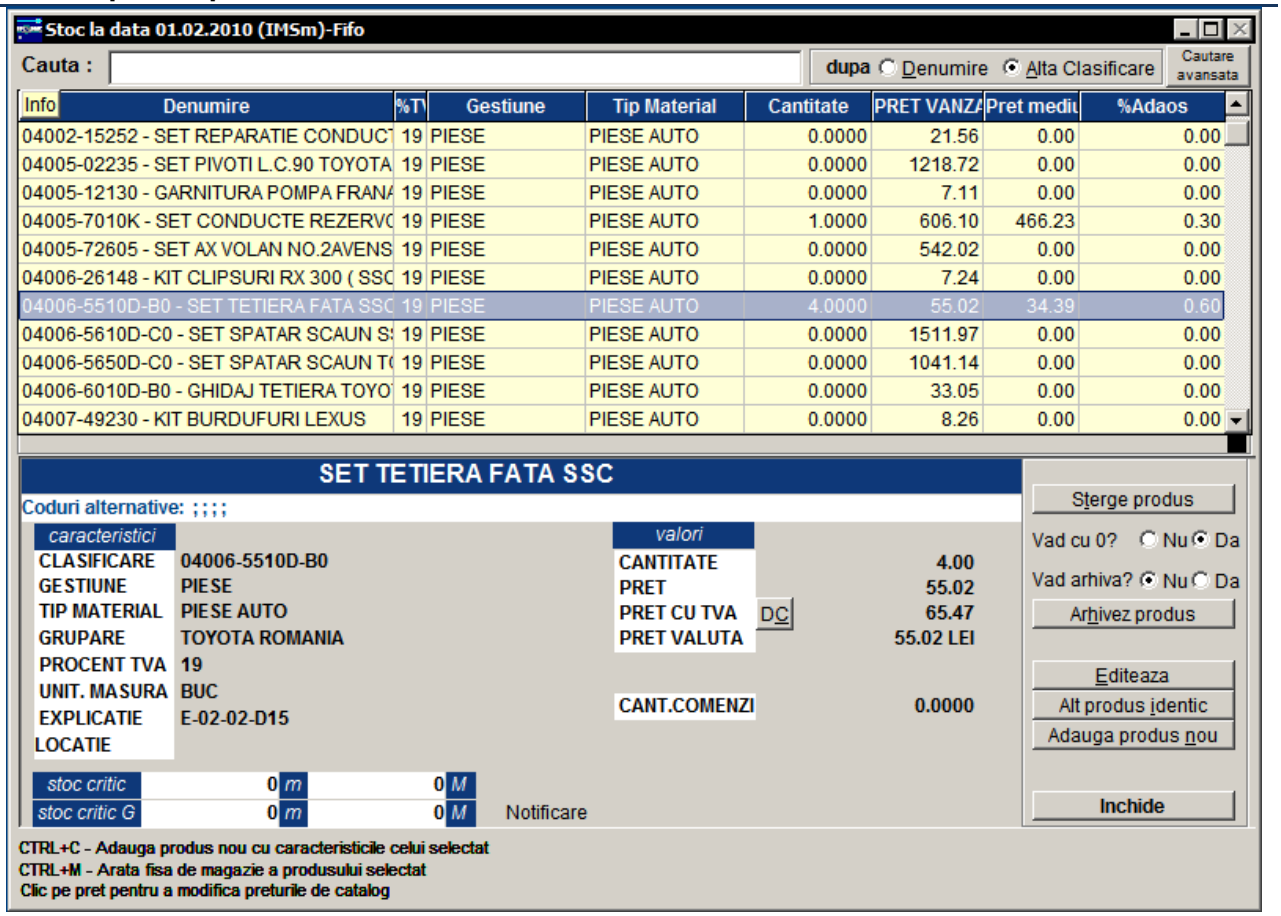
Trendix uses a friendly graphics user interface that is both easy to use and fully customizable, to the user's specific needs. Also it uses a reporting system that allows every report obtained to be exported in html format or to Excel (with or without color and font formatting) or the report (in printed version) can be exported to PDF format, granting the user ease in communication both for internal and external communication.



It also has multiple levels of security, both in option accessing and in types of operations permitted per account.

Parts management

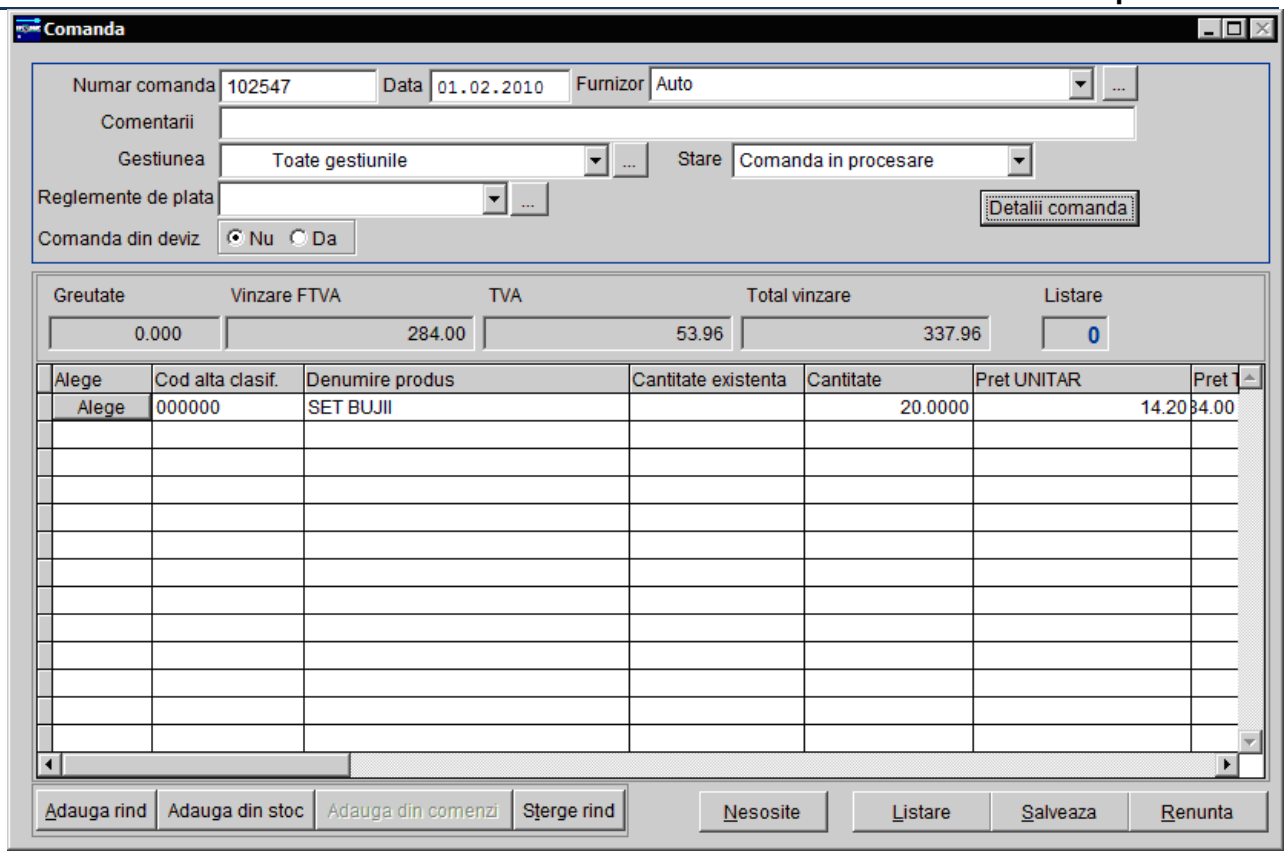
The parts management system offers real-time stocks reporting and we will be presenting the entire circuit regarding parts ordering, reception and interrogation. Parts stocks can be easily accessed through the parts list, which can easily search a part either by name or by part code, the user being able to choose the search criteria. Besides name and part code each product can have up to five alternative codes (that can also be used as an advanced search criteria), four sets of details, a foreign language name for the part and country of origin. Also for each part the user can set up a critical stock, which can later be used for obtaining a report of the parts which have a stock below critical levels and also can make suggestions for the amount to be supplied based on previous sales and usage. Besides quantity in the quick access parts list other fields that can be shown are: Selling price (from price list), average supply price, percent of trade margin, etc.



Also for aiding stocks analysis the user can use a variety of reports:

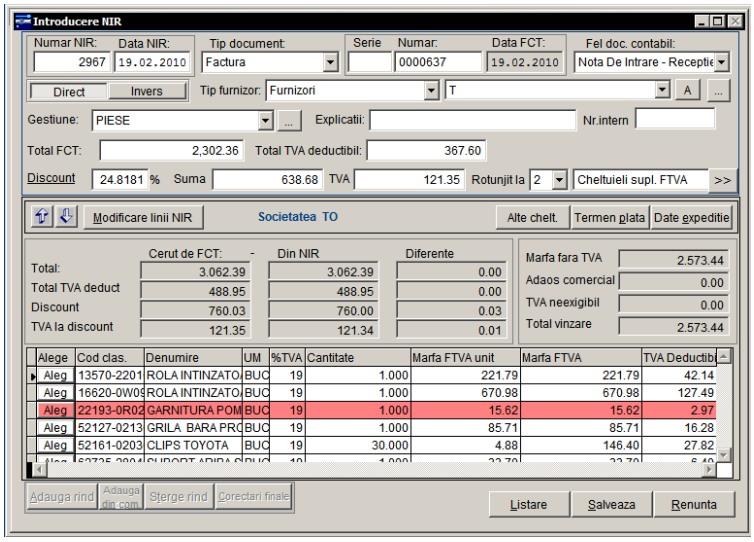
- Stocks – an entire parts inventory on a certain date;
- Stock movements – an entire history of movement of a certain part or parts
- Stocks without movement – analyses and obtains a report of parts that have been supplied and not used for a certain amount of time
- Stocks speed of rotation – analyses for every part the speed measured in days from time of supply to part usage, statistically on a give set of time
- Critical stocks – stocks that have fallen below the critical amount set by user and suggestions of amount to be supplied.
- "Dead stocks" – stocks supplied before a user set date and without movement for the entire duration.

After the parts and the amount to be supplied has been established a supplier order can be opened for precise stocks management.



The user can record the order placed to a supplier, other optional explanations, the state of the order (Order being processed or 'On the way' order) and can also tie the order placed to the supplier to a specific work order. If the order does not arrive all at once, the user can view the parts that have yet to be received.

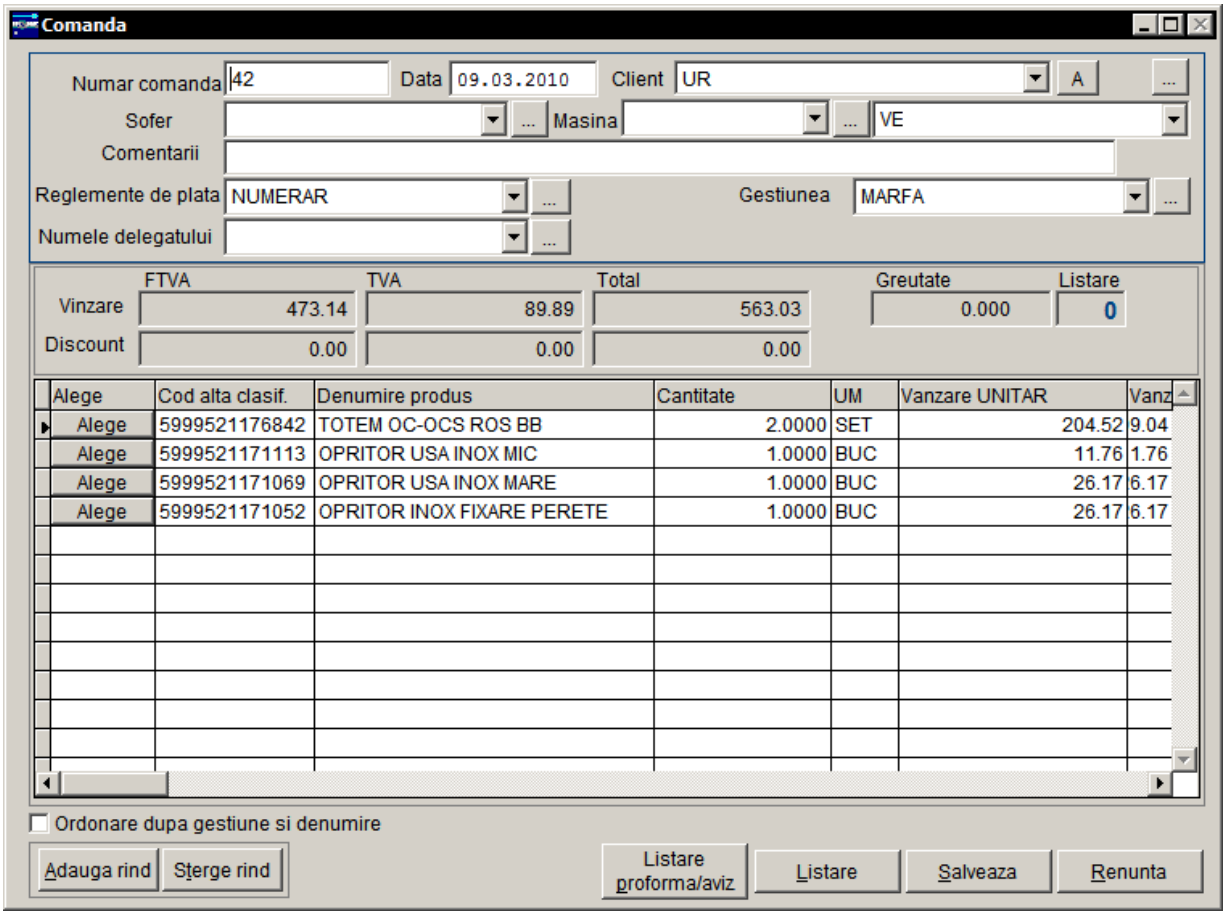
If the order placed is the same as the parts that are received, after checking the order placed with the parts that have arrived the user can transform the order into Parts Receiving Note that records the invoice and loads the stocks after parts receiving.



The parts can be received either in national currency or in a foreign currency with exchange rate. This document is also used for parts returned to suppliers using an easy selection of the part from previously received invoices (For parts returned the user selects the invoice and the product that is returned, from previous invoices)

After the parts are received, depending on what their destination was, they can either be placed on work orders or sold directly to the client that ordered them.

For a more in depth stock management the user can record parts requested by clients that are not available in the current inventory, recording a Client Part Order.



The Client Order can record parts that client has requested and it can also be printed as a proforma invoice. After the part is received the Client Order can be transformed into an invoice to avoid double data input.

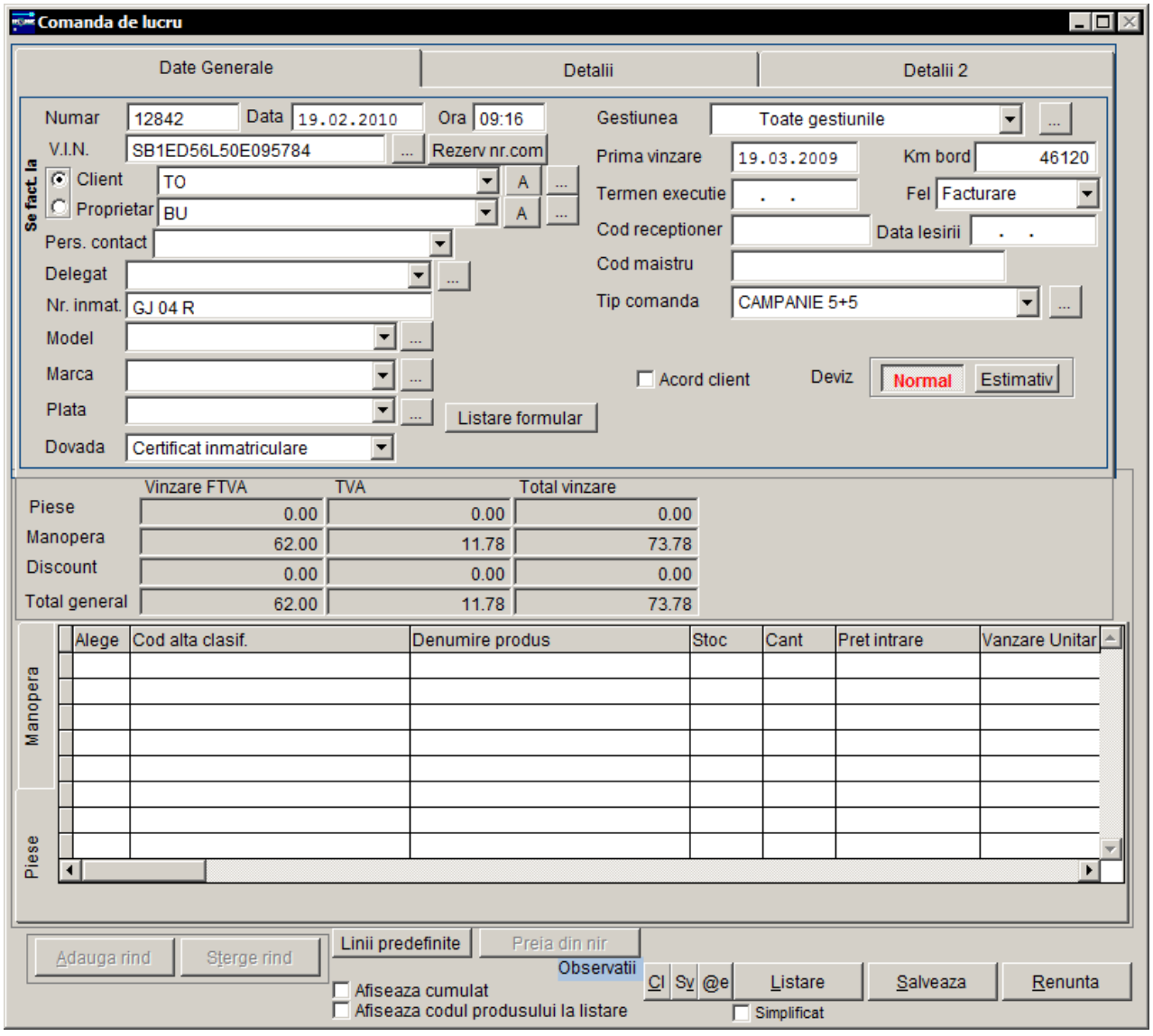
If the parts are intended for work orders, after receiving they will be used on the work order that was awaiting for the required part. At the moment it is received, either the user that receives the part or the user that manages the invoice pricing can set the selling price in the pricing catalogue. The pricing system can have multiple pricing, for important clients the user can define the specific clients that use preferential pricing and apply different discount for parts or different prices altogether and for the rest of the client defines the general pricing lists, that are used for clients other than the preferential ones.

Placing the parts on an order will be presented in the next chapter, Workshop Management.

Workshop management

The workshop management is organized around the work order that is presented in following paragraphs from the moment the client arrives at the front desk to the moment his car is returned in perfect order.

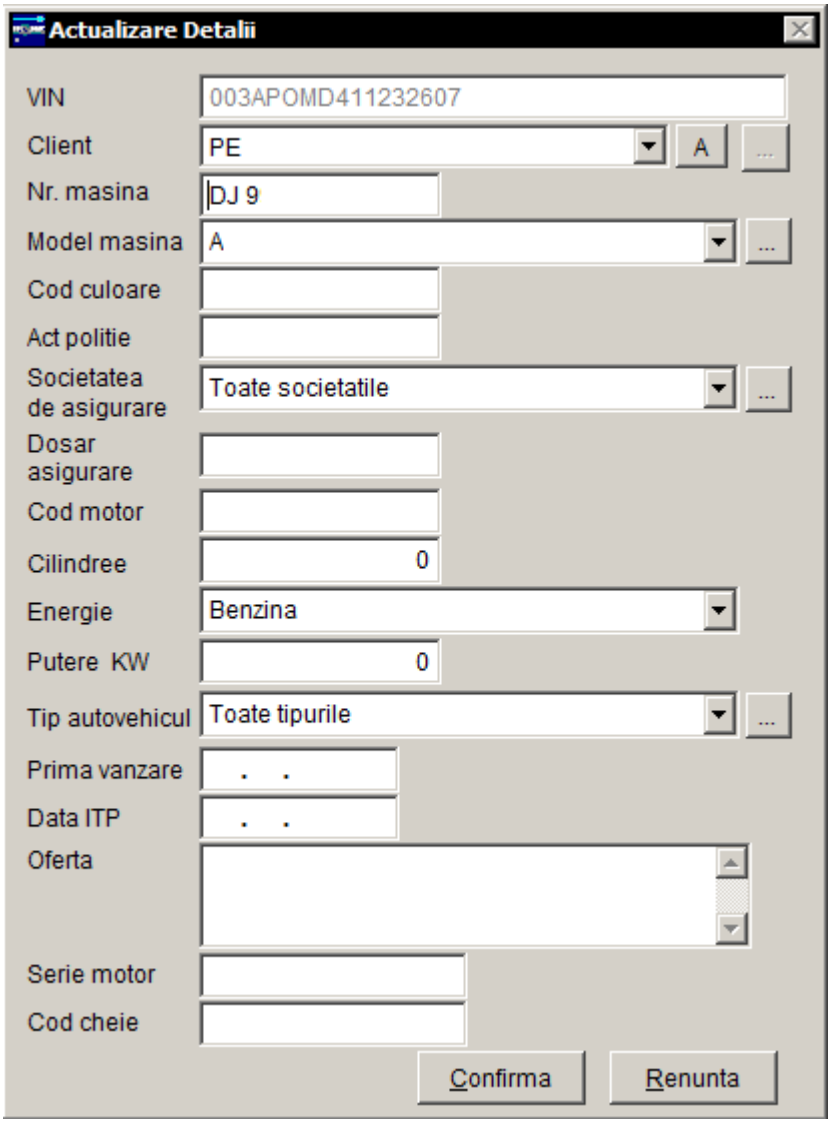
When the client arrives at the front desk the front-line receptionist, opens a work order, recording the identification information on the vehicle, and the client contact data and the problems that are to be sorted on the vehicle.



The receptionist opens the work order and if the vehicle has been in the service before, upon completing the VIN the rest of the data previously recorded in the work order or on the initial vehicle sale are auto completed. If the car arriving is new in the dealer the front-line worker opens the order and enters:

- Work order number, date and opening time are generated automatically by the application. If it's a multi-user front-line the user has the option to reserve the work order number assigned so that it won't be assigned to a work order opened at the same time.

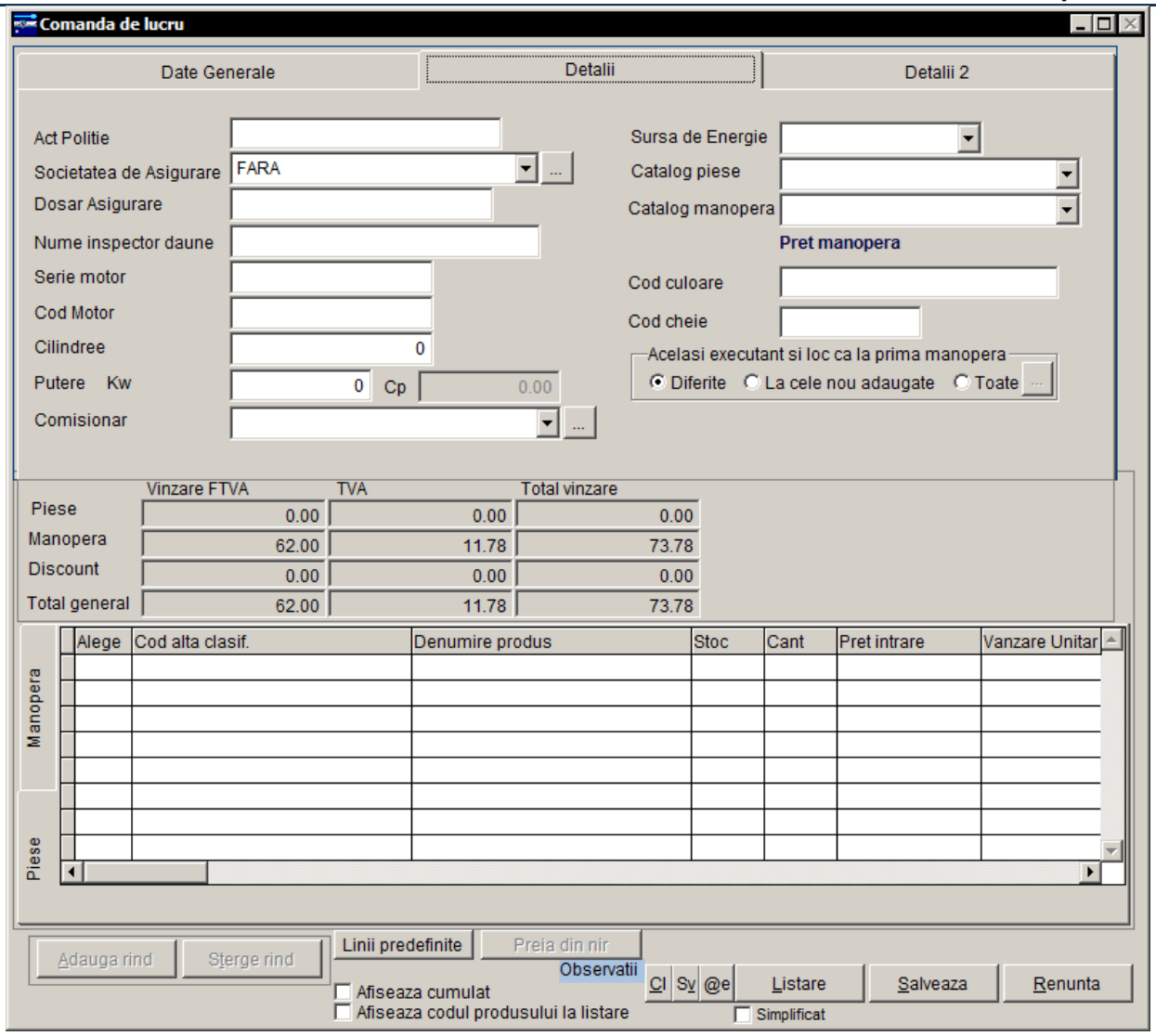
- Vehicle identification number: as it is printed on the car's certificate. The identification number is used to record the vehicle history that can be accessed at any time. The user can view and check additional information stored about the car searching it by VIN, client or owner using the ... button right next to the VIN.



- Client and/or owner, useful in case of leased cars that have different owner and client and contact information.

- Plate number, model name, method of payment, first sale in the case of dealer sold vehicles, kilometers on board at the time of the work order opened.

- If necessary additional details can be recorded on the next tab:



- Police proof, insurance company, insurance record number, insurance inspector, engine serial number, engine code, engine capacity, horse power, energy source, parts pricing catalogue to be used for pricing (for new clients), labor pricing catalogue to be used, color code (paint), key code (for remotes).

- Additional information on Details 2: Gear box type, traction type, own mass and color (description).

- After all the necessary details have been recorded the front-line worker (receptionist) records the problem the client has with the vehicle after which he prints out three forms:

    - Vehicle Reception Form – will be used by the person in charge of receiving the car to record details about the vehicle condition – scratches, dents, additional items in the vehicle (spare tire, level of gas in the car) number of kilometers on board that also contains the problems indicated by the client;

    - Parts and Labor needed – that will be used by the chief technician or the person in charge to establish the parts needed and the types of labor operations needed to correct the problems indicated by the client

- Client Acceptance Form – after the client or owner is made aware of the parts and operations needed he can either and can request an estimate, after that it can be either accepted, partly accepted or rejected by the client;

- After the parts and operations that need to be executed have been established the chief technician assigns the workers that will perform the operations, the parts are released and technicians record besides the parts used the time it took to complete the operations. For standard operations a standard time of completion is defined per operation. The way of releasing the parts to be placed on the work order can be configured in three ways (with financial and accounting implications depending on the business accounting organization of the dealer)

- After all the operations have been completed, recorded in the work order, parts placed, the client can be contacted and upon receiving the vehicle the work order can be transformed in an invoice and billed which automatically closes the work order.

Other types of work orders that can be recorded are warranty work orders (for operations covered by the vehicle's warranty) and internal work orders (for dealer's own vehicles).

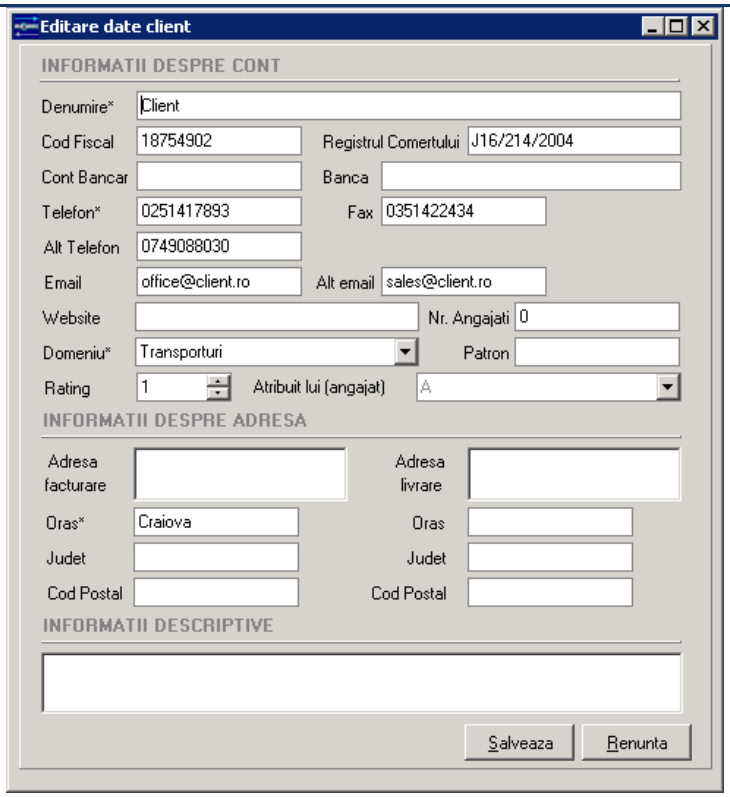
For work order analysis there are a number of reports that can be used:

- Billed work orders – work orders billed on a given time frame;
- Man-hour/work orders report – analyses the technicians' performance on a given time frame.
- Vehicle history
- Estimated work order trade margin
- Client vehicle history
- And others.

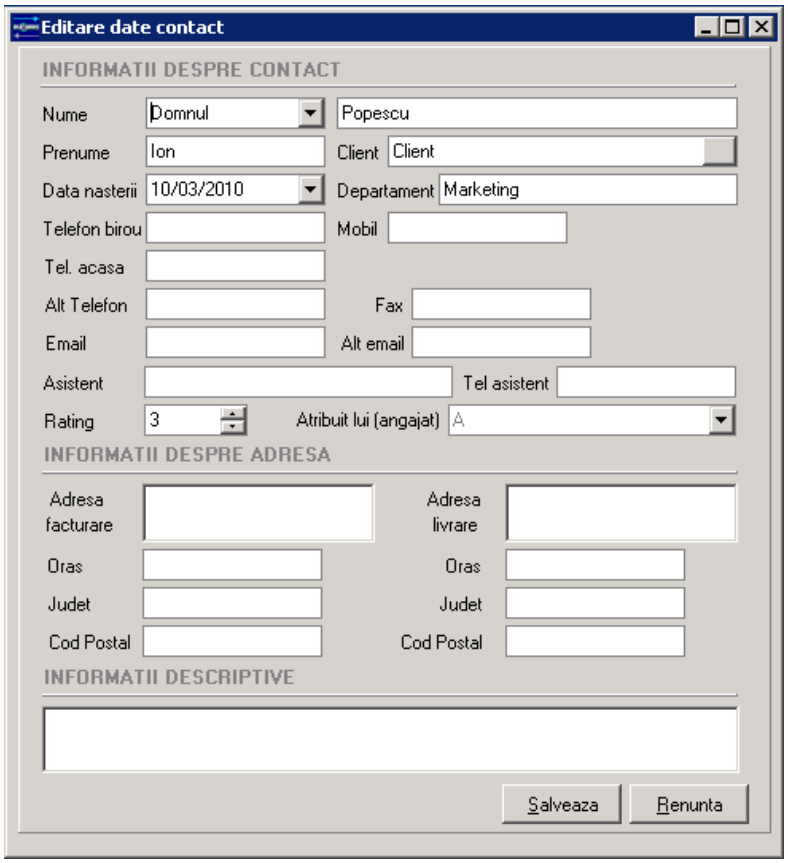
Customer Relationship Management

Part of the Customer Relationship Management can be used directly from the application for recording multiple contacts, customer satisfaction follow-up, and so on, but a stand-alone module for Customer Relationship Management can be installed for establishing meetings, to do lists, more information about contacts, client and contact rating and so on.

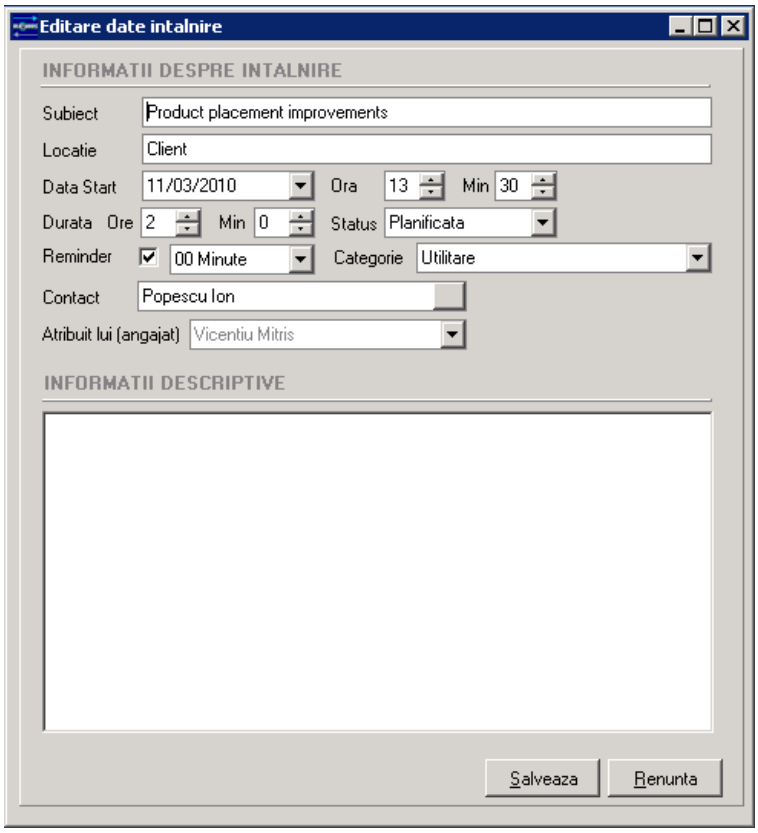
Adding clients can record additional information about potential clients or current ones and record: client name, fiscal identification data, bank account, fax, phone, e-mail, alternative e-mail, business area, website, business owner, client rating (from 1 to 5, 1 being the lowest and 5 the highest), employee handling the account, billing address, delivery address and additional information.



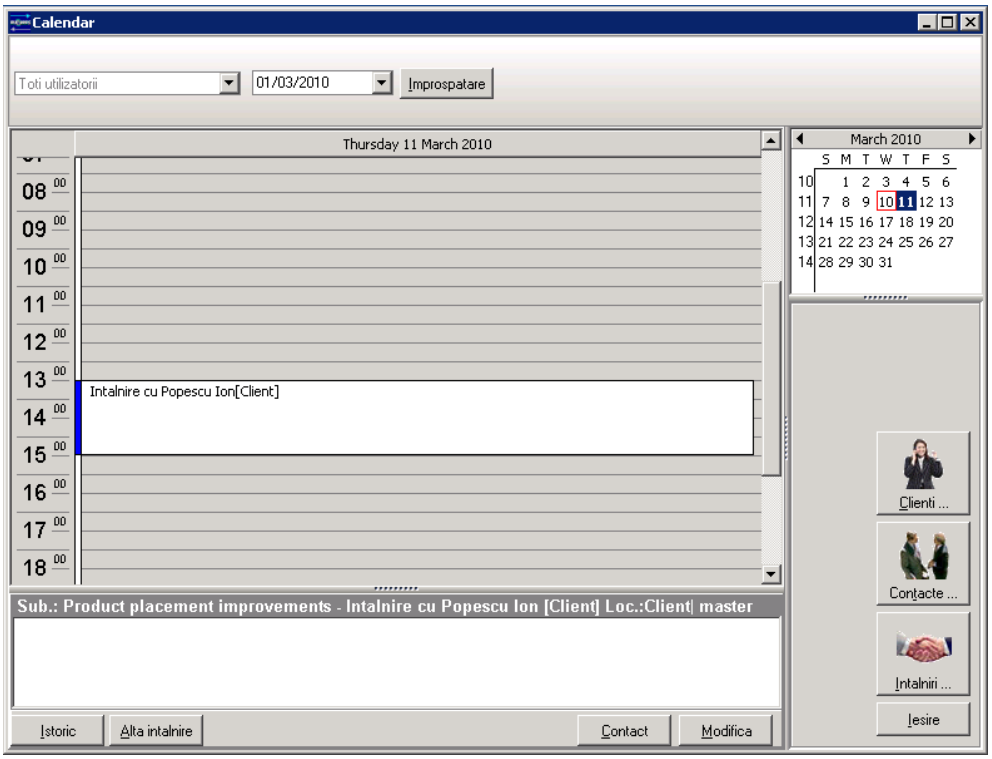
For each client an unlimited number of contacts can be established and can record: title, name, client, birth date, department, work phone, cell-phone, home-phone, fax, e-mail and alternative e-mail, contact assistant, assistant phone, employee handling the contact, contact rating (1 to 5).



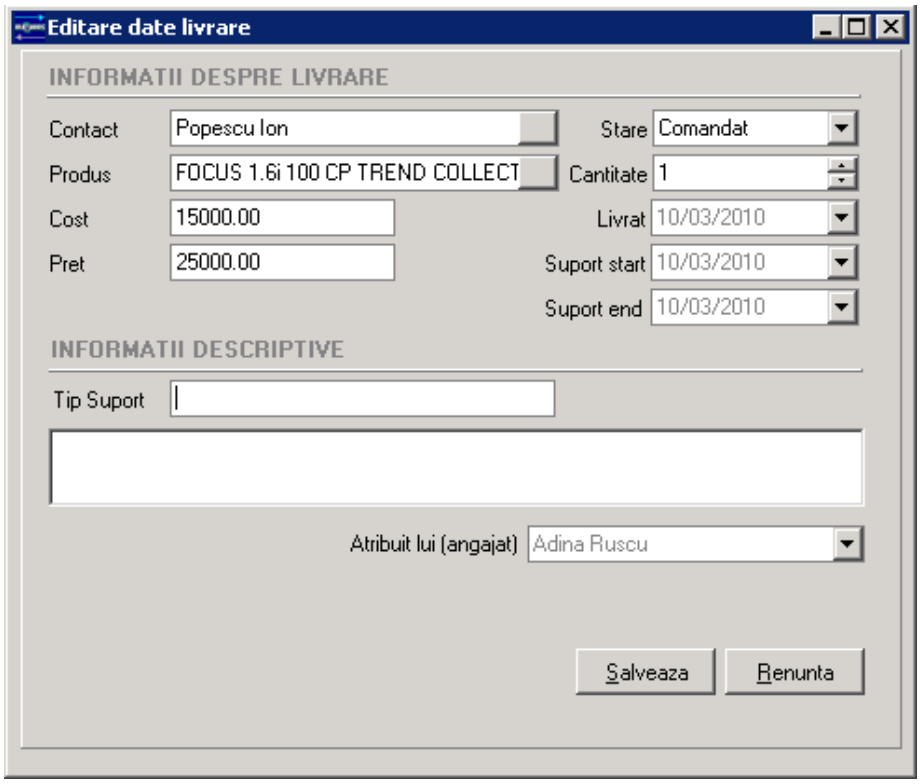
Meeting organizing can help organize the client meetings and when added can record: meeting subject, location, start date and time, duration, status, reminder interval, contact, employee handling the meeting and additional descriptive information.



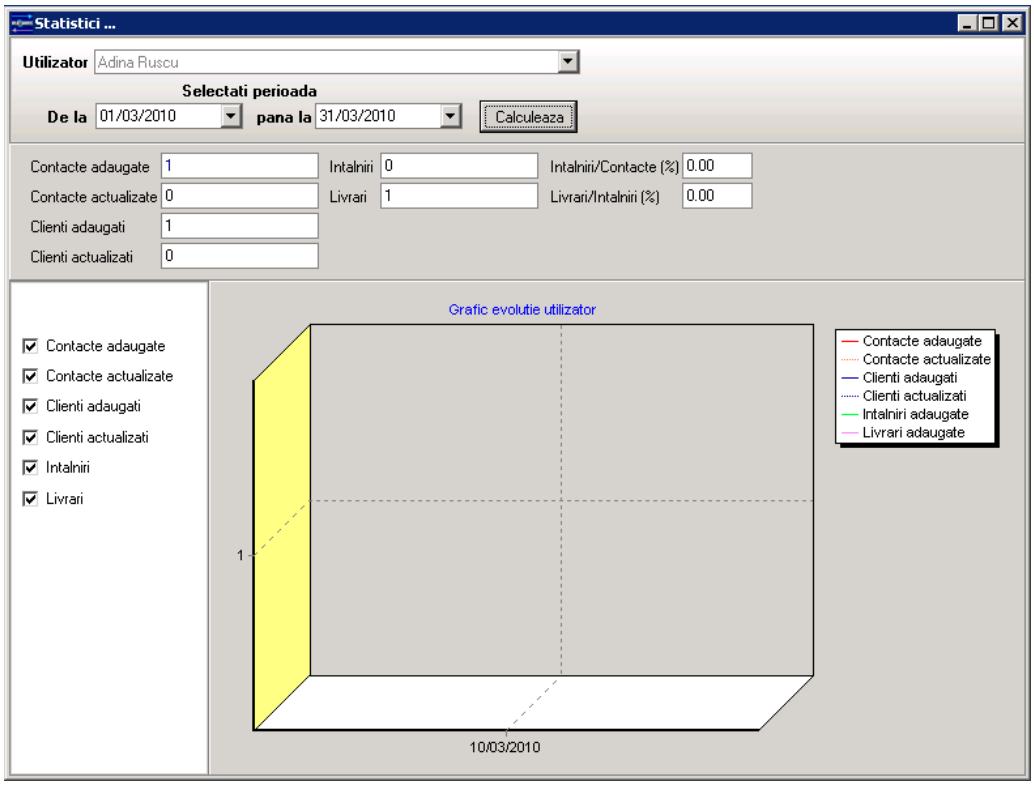
After recording the meetings they are organized visually in calendar form:



Vehicle deliveries, orders and/or status can be added and can record: contact name, status (evaluation, ordered, delivered), product ordered, quantity, cost and price and after the delivery has occurred support start and end date.

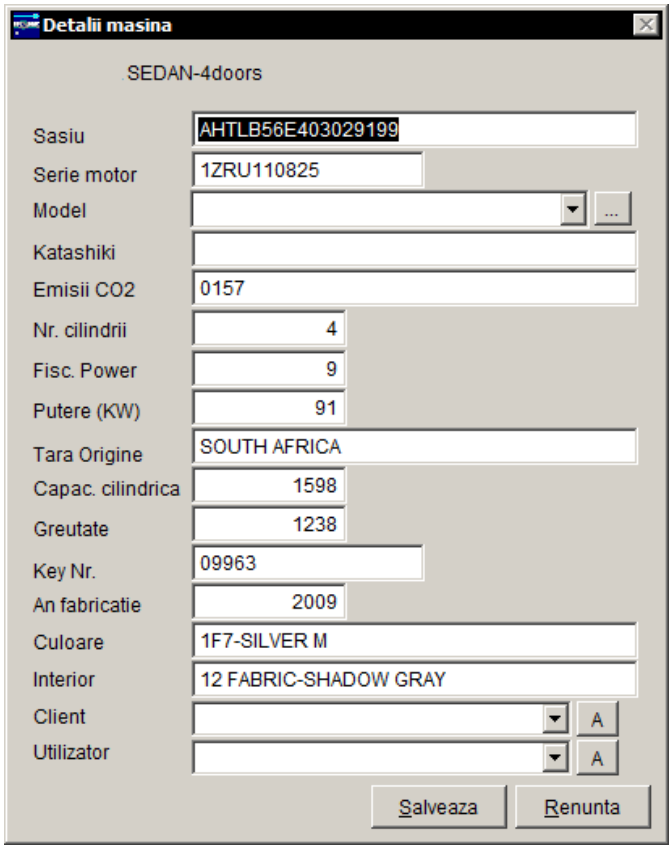


On any given time frame the user activity can be analyzed using the statistical display that puts in graphical form the user activity: contacts added, contacts updated, clients added, clients updated, meetings added, deliveries added.



Vehicle sales

Vehicle sales is managed using a combination of stock management similar to how parts are managed, with the addition of recording additional data about the vehicle received at the moment the invoice is received and recorded in the system.



Also vehicles ordered, deliveries can be managed using a combination of client orders and CRM deliveries presented in previous chapters.

Besides the DMS components, Trendix also has modules for complete financial and accounting adapted to the local accounting rules and regulations. Contains: Accounting module - with real-time transfer from DMS to the accounting module of every operation (accounts used for accounting statements), Fixed assets depreciation module, Wages module – also adapted to the local accounting rules and regulations, that also transfer the operations to the accounting module, where everything is centralized and the mandatory accounting statements, books and logs can be obtained.