

Illinois EVR

Centralized Inventory Management Program

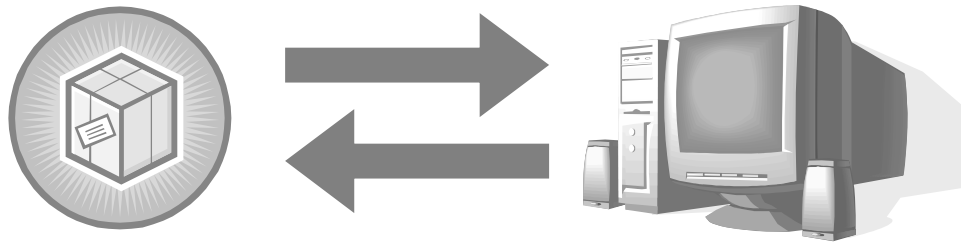


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Preface

Entering the CIM Program in Illinois EVR:

Most clients will enter the CIM program using the following method:

1) Select the  **Menu** from the left sliding menus.



2) Then, select the **Icon**.

3) When prompted to "Select Jurisdiction", select **Illinois**, and then **OK**.

Sometimes in cases of security and permissions issues CIM cannot be accessed in this way and you may be instructed to enter the program in another way. Please make note of this here if this case applies to your account(s):

Frequently Used Acronyms, Shorthand's & Definitions:

CIM – Shorthand for 'Central Inventory Management'

CVR – Acronym for 'Computerized Vehicle Registration'

EVR – Acronym for 'Electronic Vehicle Registration'

QTY – Shorthand for 'Quantity'

IADA – Acronym for 'Illinois Auto Dealers Association'

IL – Two letter abbreviation for 'Illinois'

PO – Shorthand for 'Purchase Order'

Serial Number – The unique number on a piece of inventory.

- For a license plate, it is the license plate number.
- For a registration certificate, it is the certificate number that was preprinted on the form upon arrival, NOT what is printed at the Pend.
- For a sticker number, it is the sticker number printed on the expiration sticker that is neither the expiration date or license plate number.

SOS – Shorthand for 'Secretary of State'

RPT – Shorthand for 'Report'

I. The Purchase Orders Tab

The **Purchase Orders** tab is where you communicate and views the status of PO's with the IADA/SOS. In this tab, you may View the status of existing PO's, Order more inventory by creating a new PO, and Receive a PO.

I.A View - (View existing PO's)

When you are in the **Purchase Orders** tab, select the View link to look up PO's for your dealership. You may search a range of categories of PO's, or enter a specific PO number to search for. Select a PO line to view its details once listed.

The Four Different Statures of PO's are:

- OPEN – Has not yet been sent by the IADA.
- SHIPPED – Has been sent and will need to be received on arrival.
- RECEIVED – Has been received and is distributable.
- CLOSED – Has been distributed, or has been forcibly closed.

I.B Order - (Creating a new PO)

When you are in the **Purchase Orders** tab you can select the Order link to create a new PO of License Plates and/or Registration Certificates. Once you select order there are five options at the bottom you will use to build your PO.

I.B.1 Add Item - (Add an item to a new PO)

The **Add Item** button is used to add a new item to a PO before it is sent. When selected, a window will appear with a dropdown menu that will contain the different types of inventory you may order:

The screenshot shows a dialog box titled "Add Item to PO for IL000098". It contains a section for "Current Inventory Information" with a dropdown menu for "Inventory Type" currently showing "2006 Registration". Below this are fields for "On Hand" (3243) and "On Order". At the bottom, there is an "Enter Order Quantity" field and "OK" and "Cancel" buttons. Two callout boxes provide instructions: one points to the dropdown menu stating "Here, the inventory type 2006 Registration was selected from the dropdown menu..." and another points to the quantity field stating "Here, you would enter the desired quantity... Limitations on amounts are listed below..."

*** Be sure you are selecting the right type of inventory ***

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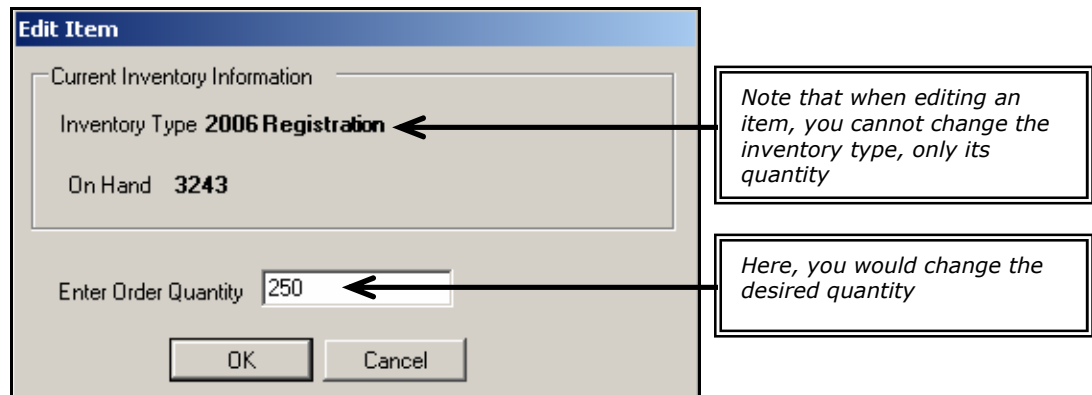
- License Plates (Passenger & Truck) come in multiples of **50***
- Yearly Registration Certificates (Stickered Forms) come in multiples of **100***
- VSD-639's (Transfer Cards) come in multiples of **250***

These multiples are as of 12/01/08, and are subject to change by the IADA for special end year periods or permanently

When you are satisfied with your selection(s), select OK. Don't be afraid to add a line you are unsure of, you can always edit it or delete it before creating the PO.

I.B.2 Edit Item - (Edit an item in a new PO)

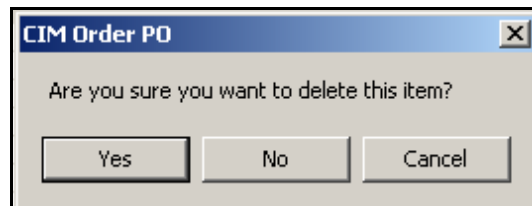
The **Edit Item** button is used to edit a quantity of inventory you have already added to the PO before it is sent. First highlight the line of inventory you would like to edit, and then select the button.



When you are satisfied, select OK. If you add a line you are unsure of, you can always edit it or delete it before creating the PO.


I.B.3 Delete Item - (Delete an item in a new PO)

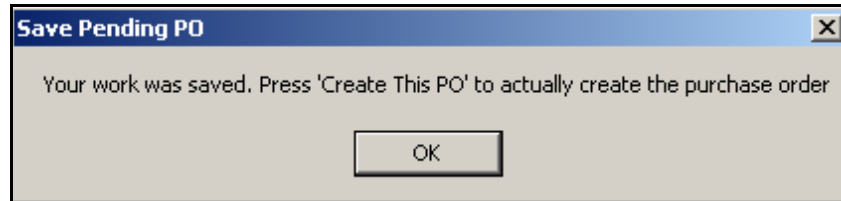
The **Delete Item** button is used to delete an entire line item from the PO before it is sent. First highlight the line of inventory you would like to edit, and then select the button. A window will then appear:



Click 'Yes' to delete the line.
 Click 'No' not to delete the line.
 Click 'Cancel' to close the box with no changes.


I.B.4 Save Pending

Click on the  button and you receive the following:

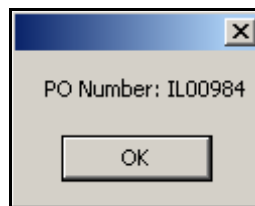


This allows you to continue to save your progress in creating a PO.

I.B.5 Create This PO - (Create the new PO)

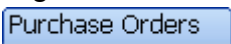
When you are satisfied with your built PO, you may select the  button to send the request to fulfill the PO.

A window will then appear with an automatically generated PO number:



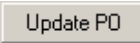
Once you click OK, the PO will then be opened in the View Mode.

I.C Receive - (Receiving a PO that has arrived)

When you are in the  tab, you select the Receive link to receipt in a PO and gain the ability distribute its contents to stations in the dealership. Select the PO you wish to receive, and it will display in window(s) to the right for you to review.

The only button available here is the  button.

I.C.1 Update PO

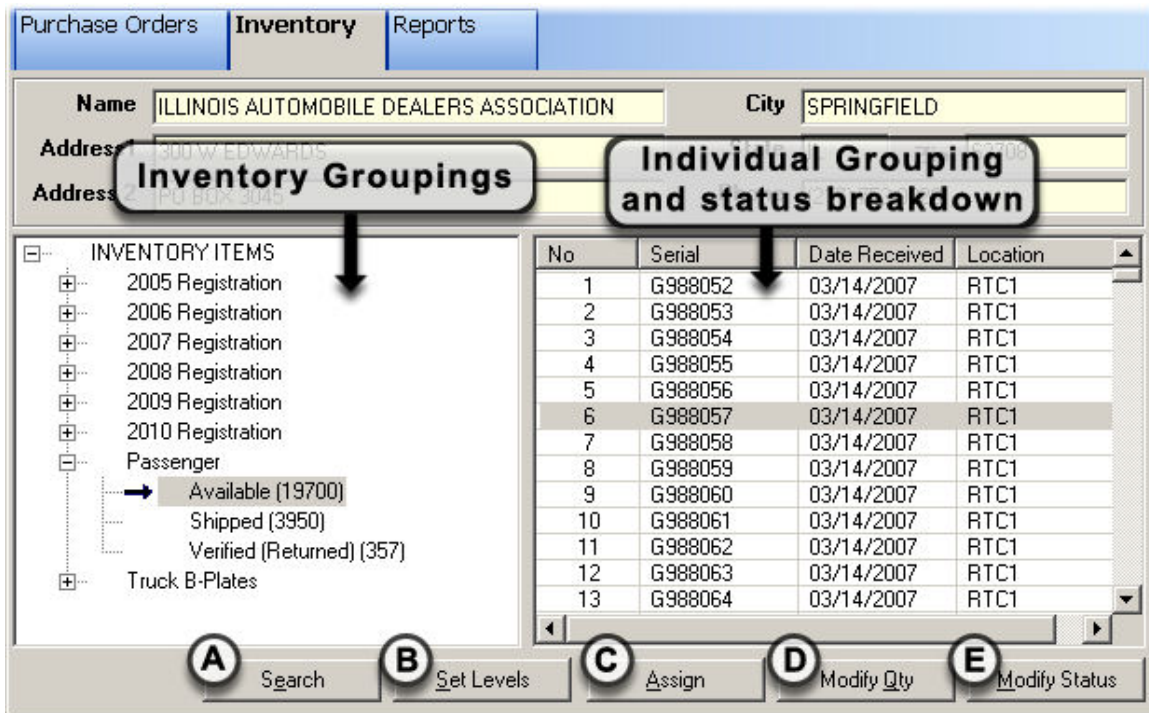
The  button is used to make the inventory in a PO you have received usable. **Make sure you review your order and verify what has arrived.** Inventory that could have been damaged in shipping can always be modified later (*as explained in section II.E*). Call the IADA directly if there are discrepancies in what has arrived versus what is on your packing slip or in the CIM program.

II. The Inventory Tab

The **Inventory** tab is where inventory that has been received is managed inside the dealership between Station ID's. It can be Assigned and Modified as needed. **Inventory needs to be assigned to specific CVR Stations. It is not assigned by User ID.** By default, when inventory is received it is immediately assigned to the location 'TC'.

On the left hand side you see all of your inventory types. These categories can be expanded or collapsed by selecting the [+] or [-] symbols next to them. By expanding a category you then can see the differing status' and the amounts in each status.

See the figure below in the following sections regarding the Inventory Tab for visual reference. The figure is not at accurate scale, however all buttons and items are located properly in relation to one another.




II.A Search - (Searching the history of inventory status')

Searching inventory is a feature used to track the history of an item through its status changes up until the most recent status.

Select the **Search** button and then select from the dropdown menu labeled **Inventory Type** the category you would like to search, and then enter its **Serial Number**. Once completed select **OK**. The result will display momentarily and you may then print the search query from your default printer.


II.B Set Levels - (Setting inventory levels)

'Set Levels' allows you to indicate minimum/maximum inventory quantities that alert users when they fall below or above this level. Currently only the minimum value is supported (as of 12/01/08). The maximum value may be utilized in future versions of Illinois EVR and CIM.

Select the  button and then select the minimum and maximum amounts desired. Once your selections have been made, select **OK**.

II.C Assign - (Assigning inventory to stations)


Electronically assigning inventory is done to either allocate inventory to the appropriate stations that will be using it, or simply move existing inventory as desired. Remember, a Purchase Order's inventory must be received before you can assign it.

Once in the  tab. On the left hand side select the inventory type you would like to assign, double-click it (or select the [+] button next to it to expand), and then select the '**Available**' line. This will display all inventory of that type in that category on the right hand side of the screen. Note you may sort the items how you prefer by clicking the headers. Once you've navigated to Available inventory to be assigned, do the following:

On the right hand side, highlight the inventory you'd like to Assign. To select multiple lines, use standard Windows shortcut commands (**SHIFT**, **CTRL**, **Arrow Keys**).

For example:

If I want to select plate numbers ABC100 thru ABC125, I would first highlight plate ABC100, then hold down the **SHIFT** key on my keyboard. While still holding the **SHIFT** key own, I would then select plate number ABC125. All plates between these two on screen will then be selected. Then I could let go of the **SHIFT** key.

Once you've selected the inventory, select the  button and choose the appropriate Station ID you'd like to assign it to. Once you've made your selection, press **OK**. It is recommended after assigning inventory you verify the assignment has been done successfully.

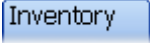
II.D Modify Qty

'Modify Qty' is not currently supported in the Illinois program. This feature is used for adjusting quantities of non-serialized inventory. All inventory tracked in CIM after receiving is serialized and needs to be accounted for per the Illinois SOS. This feature cannot be used unless a change in such Illinois SOS procedure occurs.


II.E Modify Status - (Modifying inventory status')

Modifying inventory is done generally when inventory must have its status changed because it cannot be issued or must be changed from one status to another.


Modifying Inventory that is not 'Available' is not always allowed. As of this authoring (12/01/08) only inventory in 'Damaged', 'Missing' and 'Available' may be modified. When trying to modify 'Damaged' or 'Missing' inventory; first make it 'Available', then again to a different status if desired.

To modify a piece of inventory make sure you are first in the  tab, and then navigate to the piece of inventory you need to modify.

To navigate to the inventory, on the left hand side select the inventory type you would like to modify, double-click it (or select the [+] button next to it), and then select the status category you need to work in. This will display all inventory of that type, in that category on the right hand side of the screen. Note you may sort the items how you prefer by clicking the headers.

Highlight the piece of inventory to be modified. Then select the  button. A box will appear where you will then select from the dropdown menu the status you want to change the selected inventory to. Make your selection, and then select **OK**. It is recommended after modifying inventory you verify the modification has been done successfully.

III. The Reports Tab

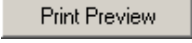
Under the  tab you can produce reports on the status of inventory in your dealership. You may also produce the automated inventory report cover sheet when you have Illinois inventory to return. **Any and all voided inventory will always need to be returned via the appropriate return procedure. NEVER DISCARD INVENTORY TRACKED IN THE CIM PROGRAM.**

III.A Detailed Report - (Reports of detailed inventory status')

The Detailed Report allows you to print a customized report on inventory dispositions. After selecting the Detailed Report link, to the right there is an area labeled "Dealers". In this area you will see fields showing your Illinois Dealer Number, Dealer Name (as indexed by CVR), and your CMF number (CVR Customer Number). Make sure your account line is highlighted.

To the lower left there are check boxes labeled under the "Status" area. Check these boxes to customize the report to only display the inventory dispositions you would like to see reflected on the report.


To the lower right under the "Series" area, you may highlight the Series Descriptions (*a.k.a. which types of inventory*) you'd like to see on the report. To select multiple lines, highlight one, hold down the CTRL key on your keyboard, and with the mouse select additional types of inventory.

In the lower right you will see the  button. After you've made the selections you would like to see in your detailed report, you may select this button to preview your report, and then print it to your default printer.

III.B Summary Report - (Reports of summaries on inventory status')

The Summary Report allows you to print a summarized report on inventory dispositions. After selecting the Summary Report link to the right under an area labeled "Dealers" you should see a field showing your Illinois Dealer Number, Dealer Name (as indexed by CVR), and your CMF number (CVR Customer Number). Make sure your dealership line is highlighted.

To the lower right under the "Series" area, you may highlight the Series Descriptions (*a.k.a. which types of inventory*) you'd like to see on the report. To select multiple lines, highlight one, hold down the **CTRL** key on your keyboard, and with the mouse select additional types of inventory.

In the lower right you will see the  button. After you've made the selections you would like to see in your summary report, you may select this button to preview your report, and then print it to your default printer.

III.C Inventory Return Rpt - (Report used for returning Illinois inventory)

This report is very important to maintain appropriate inventory controls. A supplemental guide outlining how to generate and use this report is available with detailed up to date instructions. If you do not have this or cannot locate your copy, obtain one via your representative or online.

The automated inventory return report is designed to eliminate hand written reports and produce an automated cover sheet for inventory you need to return.

III.D IL Reconciliation Rpt

A supplemental guide outlining how to generate and use this report is available with detailed up to date instructions. If you do not have this or cannot locate your copy, obtain one via your representative or online.

The reconciliation report is used to pair pieces of related inventory to one another and assist in the returning of inventory. An example would be entering a sticker number to determine what certificate number it is related to.