

LeBlanc & Associates

HomeRun XL 3.5 Car Dealer Software

Version 3.5

User Manual

The logo for HomeRun XLv 3.5 is displayed in a bold, orange, sans-serif font. The 'v' is a stylized lowercase letter. The text is set against a light gray rectangular background that is part of a larger graphic with a grid of darker gray squares.

HomeRun XLv 3.5

Used Car Dealer Software
Software to help you
profitably manage your
Dealership

HomeRun XL 3.5 Car Dealer Software

User Manual

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Published 2013

Printed in Canada

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NOTE:

The HomeRun Software program uses various forms in this software.

We believe these forms meet the requirements of the Motor Vehicle Dealers Act 2002 (MVDA)

We have made every effort to ensure that these forms meet the requirements of the MVDA 2002.

However, these forms have not been vetted by our Lawyers.

It is highly recommended that you have these forms checked with your Legal Counsel to ensure that they are suitable for your Business.

LeBlanc & Associates expressly disclaim all responsibility for the validity of these forms.

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July 2013

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Introduction

Welcome

Welcome to HomeRun XL 3.5 Car Dealer Software. The developers of HomeRun XL 3.5 Car Dealer Software are experienced business systems professionals who know the features that heavy-duty, professional business applications must have. You'll find those features in HomeRun XL 3.5

This *User's Guide* is the place to begin with HomeRun XL 3.5 Car Dealer Software. The *User's Guide* shows you how to install HomeRun XL 3.5 Car Dealer Software and is your main HomeRun XL 3.5 Car Dealer Software reference.

Why Use HomeRun XL 3.5 Car Dealer Software?

Here are only a few of the many reasons that you should use HomeRun - The Car Dealers Program.

- **Save Money:** HomeRun can reduce the money you are spending on pre-printed forms. All information for a Vehicle Bill of Sale is filled out on screen and printed on your laser or bubble jet printer.
- **Ensure Profitability:** Even before you print the Bill of Sale for the customer, you know exactly how much profit you will be making on the sale.
- **Track Expenses:** HomeRun allows you to track all expenses associated with each vehicle.
- **Track Vehicle Activities:** HomeRun allows you to enter and track all your activities, Wholesale and Retail Purchases and Sales..
- **Validate Serial Numbers:** HomeRun automatically checks the serial number you entered each time you save a record, and informs you if it is not a valid serial number. There is also a separate VIN Checker in the program so you can check a VIN before entering a vehicle in the program.
- **Validate Vehicle Year:** HomeRun automatically obtains the year of a vehicle from the serial number (after it ascertains the number is valid) and inserts it into the record when it is saved.
- **Calculate Loan Payments:** Allows you to calculate and print Loan Payments periods in the Bill of Sale by Monthly, Bi-Monthly, Weekly and Bi-Weekly Periods.
- **Wholesale Buy and Sell:** Allows you to purchase and sell wholesale to other dealers. Prints Bill of Sale appropriate for the transaction.
- **Vehicle Appraisal:** HomeRun allows you to produce and print Vehicle Appraisals.
- **Trade-In Forms:** HomeRun allows you to produce a form for the trade-in client to sign for Trade-in Vehicles.

- **Windows Flyers:** Produce individual professional looking Windows Flyers for your vehicles.
- **Reports:** Many reports are included with the program such as Vehicle Listings, Delivery Schedules, Inventory Valuation Reports, Sales Report and Purchase & Tax Reports.
- **Security:** Allows you to have full User Security such as Access to the program. Fields, such as profit & cost, can be hidden from employees on a need to know basis. Menu Security allows you to decide if employees can see or access certain form and items.

Who Should Use HomeRun XL 3.5 Car Dealer Software?

HomeRun is for Used Car Dealers who want to be able to manage their business in a Professional and Profitable Manner.

Although you don't have to be a computer expert to use HomeRun, you should be familiar with the following:

- The Microsoft Windows operating environment and conventions.
- If you are going to be using HomeRun in a multi-user environment, you should understand basic networking. Especially network and printer mapping.
- The Microsoft Windows operating environment and conventions.

When You Need Help

When you need help while working with HomeRun XL 3.5 Car Dealer Software, the first place to turn is the HomeRun XL 3.5 Car Dealer Software documentation. You can also access the HomeRun XL 3.5 Car Dealer Software documentation in the program from the HomeRun XL 3.5 Car Dealer Software Help menu.

HomeRun XL 3.5 Car Dealer Software Technical Support

The LeBlanc & Associates is committed to providing the best possible technical support for HomeRun XL 3.5. This section describes the technical support resources available to you for free and for purchase.

New User Support

HomeRun XL 3.5 is predominately sold on a yearly subscription basis. For these users, the yearly subscription includes on-line and email technical support and training when required for the duration of the subscription period.

We are well aware when someone purchases our product that they will need help in setting up and learning to use HomeRun.

One of the advantages of purchasing yearly support is all the updates and program upgrades will be provided free of charge during the paid support period.

Provided the computer system is on a high speed Internet network, we can offer technical support for any Windows operating systems by using Remote Software through your web browser by logging into your computer, with your permission, and fix any problems you may have. We can also help you with the initial set up of HomeRun XL 3.5 as well as show you how certain features work.

HomeRun XL 3.5 Car Dealer Software Web

The HomeRun XL 3.5 Web is the cornerstone of HomeRun XL 3.5 Technical Support because it allows us to provide timely support information to users throughout the world. The HomeRun XL 3.5 Web's Technical Support pages are a valuable resource for:

- Frequently Asked Questions
- Descriptions of HomeRun XL 3.5 Support Plans

You will find everything you need to know about HomeRun XL 3.5 Technical Support on the HomeRun XL 3.5 Web Support pages.

HomeRun XL 3.5 Product Maintenance

Software must be maintained. As bugs are found or other minor changes become necessary, software maintenance updates must be available. All too often, software developers do not provide maintenance updates as frequently as they should. Our goal is to provide maintenance updates on a timely basis.

Maintenance updates are made available for download from the HomeRun XL 3.5 Web. If you are on the yearly support option, you can download maintenance updates from the HomeRun XL 3.5 Web for free. If you need an update shipped to you, there will be a charge for materials costs and shipping.

If you are not on yearly support, we can make updates available to you for a fee. Check our web site for information.

HomeRun XL 3.5 Product Upgrades

The HomeRun XL 3.5 staff is constantly adding new functionality to HomeRun XL 3.5. An important part of your purchase of HomeRun XL 3.5 is the assurance that the product will continue to evolve with changes in technology. After all, you don't want to be stuck with a product that's become obsolete.

Charges for HomeRun XL 3.5 upgrades are determined and announced at the time an upgrade is released.

HomeRun XL 3.5 Priority Support

If you need emergency assistance or simply need to know that you can get telephone or email assistance when you need it on a priority basis, you may purchase additional technical support services through our Priority Support option. Priority Support can be purchased on a per incident basis or on an annual basis in sets of 10 or 25 Support Units. Priority Support provides the following additional support services:

- **Telephone Support** from 9:00 a.m. to 5:00 p.m. EST Monday through Friday.
- **Priority Response** provides access to senior HomeRun XL 3.5 staff.
- **Priority Email Support** lets you submit support requests via private email.

If you need priority telephone support, call (416) 663-8510. Telephone support hours are from 9:00 a.m. to 5:00 p.m. EST Monday through Friday.

You can also get HomeRun XL 3.5 Priority Technical Support via private Internet email. Send Internet email to support@homerunsoftware.net

HomeRun XL 3.5 Subscription Support

We now offer HomeRun XL 3.5 via subscription which may be purchased on a mostly on an annual plan.

While you are on any subscription plan, you will receive the following for the term of the purchased support.

- Telephone Technical or Training support.
- Email Telephone or Training support.
- Any updates issued during your subscription period.
- Any upgrades issued during your subscription period.

Support for Legacy Purchasers

When we initially released HomeRun,, we sold the program outright. These Users received 12 months of support with their purchase. For their purchase fee, they could use the program forever. However, if they wanted Support or Updates/Upgrades, they have to purchase annual support. These Users who pay our Annual Fee will receive the same support as those described above.

In the case that Support Payment have not been renewed for a period of time, Support payment will be calculated from the date the support was not paid to the present. Otherwise, these users can purchase an annual subscription.

HomeRun XL 3.5 Bug Reports

If you believe you have encountered a bug in HomeRun XL 3.5, send an email to info@homerunsoftware.net with a subject line of “Bug Report”. We will evaluate your bug report on a non-priority basis. If a bug is indeed found, it will be fixed and added to our next update.

If you believe you need Priority Support to deal with what you believe is a bug, you must use the Priority Support process to request Priority Support. That means you must currently be on either a subscription period.

Errors

As you work with HomeRun XL 3.5, errors may occur. Even the best computer software sometimes experiences errors..

When you run HomeRun XL 3.5, the program will display an error message if it encounters an error. When an error occurs, the first thing to do is display the Errors form from the Admin menu to view the error data that HomeRun XL 3.5 captures. The Errors form will normally provide all the information needed to diagnose and fix the error.

See “Errors” on page 83 for a description of the Errors form.

Tip: If you need to call LeBlanc & Associates technical support for assistance with an error, please have the error data displayed on the Errors form when you call.

Visual FoxPro and Visual ProMatrix

HomeRun XL 3.5 has been created using:

- **Microsoft Visual FoxPro:** the state-of-the-art object-oriented database management and application development system.
- **Visual ProMatrix:** the premier rapid application development tool for Visual FoxPro.

While you do not need Visual FoxPro or Visual ProMatrix to run HomeRun XL 3.5, there may be advantages to acquiring those two products. If you want to access the

HomeRun XL 3.5 data independently of HomeRun XL 3.5 or if you want to develop your own applications using the HomeRun XL 3.5 data, you should consider acquiring Visual FoxPro and Visual ProMatrix.

You can purchase Visual FoxPro from Microsoft or any full-line software retailer. Contact the ProMatrix Corporation to purchase Visual ProMatrix:

ProMatrix Corporation
5225 Ehrlich Road
Suite C
Tampa, Florida 33624
(800) 889-7058
(813) 960-5938
Fax: (813) 960-7231

Where to Go from Here

Here's the approach we recommend for using the *User's Guide*:

- Start with the *Installation* chapter to learn how to install HomeRun XL 3.5
- Follow the instructions in the *Setup* chapter to make sure you have HomeRun XL 3.5 set up the way you want to use it.
- Review the *Overview* chapter to experience the flavor of how HomeRun XL 3.5 works.
- Work your way sequentially through the remainder of the *User's Guide*.

Installation

Setting up your Network and Backup Considerations

Setting up your Network Considerations

Wired vs Wireless Network

Any database type program will not work well under a wireless network. This applies to HomeRun Software programs, Accounting Software or any other program that reads & writes data from a workstation computer to a main/server computer. The reason is basically that Database programs require a constant connection to ensure that the data is written back to the Server. Wireless networks by nature do not offer a continuous connection.

Most of the time we have received a call from a Client complaining that they get a "non recoverable program data error" they were running one or more computers wirelessly on a network.

The other reason is that they had a power failure and when the power came back on, they found corrupted data.

Basic Minimum Network Requirements

The following is the minimum requirements to ensure that your Network is set up in such a manner that will protect your data.

- Ensure that you have your Main/Server computer plugged into a UPS Battery Backup with a minimum uptime of 1 hour. (This will allow you to close programs and shut down the system)
- Ensure that your Internet Modem, Router & Switches are plugged into this or another UPS Battery Backup.
- Ensure that your Workstations are also plugged in a UPS Battery Backup with sufficient backup time to enable you to close any program. Remember, it will do you absolutely no good to have the server & network equipments up and running if a Workstation suddenly closes while working on a program with files open.
- Arrange to perform a backup daily for all the data that you regularly use. i.e. HomeRun, Accounting Data, Spreadsheets and other data. Remember to take the data off-premises. If you have a fire or other calamity, it will do you no good to have your data backups done and up in flame with your computers. Another reason to have a current backup is if there is a problem with your data, it's a simple matter to restore the corrupted files from yesterday's backup.

HomeRun XL 3.5 Installation

HomeRun XL 3.5 is a true multi-user program. You can install on a single computer or if you have networked computers, you can install the data on 1 computer (Server) and install the base program on the other computers on your network and map to the data on the server computer.

To install HomeRun XL 3.5, you will need to download the file(s) from the Internet using the link supplied in the email you received when you purchased HomeRun.

The Main Setup file is to be used for either Single User or a Server Installation. This is where the data will be stored

The Workstation setup file is to be used to perform a setup on network computers. The Workstations will use the data stored on the Server computer.

Important: You cannot simply copy files from the CD or Setup Disks to your hard disk. You must use the Setup program to decompress and install the HomeRun XL 3.5 files into the HomeRun XL 3.5 directories.

Before You Begin Installation

Before you install HomeRun XL 3.5, make sure that your computer meets the minimum requirements.

Hardware and System Requirements

To run HomeRun, your computer system must meet these minimum requirements:

- Any IBM®-compatible computer with a Pentium 4 2.4 Hz processor or higher.
- A mouse.
- 4 GB Minimum – 8 GB Recommended
- A hard disk with 107 megabytes of free space. More space will be required for your data.
- VGA or higher resolution monitor set at 1024 x 768 Screen Size.
- Windows XP Professional, Vista Business, Windows 7 or 8 Professional. HomeRun is a business application and as such requires a Business Operating system. . Windows XP Home/Vista Home is not a business operating system and as such is not recommended. In addition, we will not offer support on system problems if you are running these home operating system.
- Installed Windows fonts: Arial, Courier New and Times New Roman

Running Setup

Begin the HomeRun XL 3.5 installation process by running the Set up file downloaded from our Server. Download both the Main/Server and Workstation Setup files.

Setup for a Single User or Main Network Computer.

➤ To run Setup

1. Start Microsoft Windows. Close all other Windows applications.
2. **Installation from Exe File:** If you are installing HomeRun from exe file that you download from the HomeRun web site, create an empty directory and place the file(s) into that directory or save to your Desktop so it will be easier to find. Run the downloaded file from the directory that contains the EXE file.
3. Setup displays a Dialogue box telling you that it will install HomeRun in the C:\Program Files\HomeRunXL3.5 directory.
4. Follow the instructions on the screen.
5. Setup ends. You'll see a Windows Start menu entry for HomeRun. A shortcut will also be placed on your Desktop. You can now run HomeRun from the HomeRun Start menu or Desktop options.

The next step is to run HomeRun to complete the installation. Before starting to use HomeRun for the first time, you will need to enter certain information identifying your company and certain licence numbers that are specific to your company. The "Running Home Run for the First Time" section tells you how to do that. But first, read the next section to see what Setup has installed and to check your setup.

Very Important: Read and follow the instructions in the "Creating Security Recovery Files" section below to make sure you can recover if you implement HomeRun's Security Option and accidentally lock yourself out of HomeRun after setting up HomeRun's Security tools.

Setup for Networked Workstations

A Workstation setup installs the main HomeRun program files and the necessary support files required to run HomeRun on an individual computer. The Data is stored on the Server or Main computer and is used by all workstations.

Before doing a Workstation installation, ensure that you have the HomeRun Folder on the Main/Server computer set up for Sharing. The folder to be shared is the HomeRun XL 3.5 folder. Check the Security settings for the shared folder to ensure that other users accessing this folder have permission to change the data.

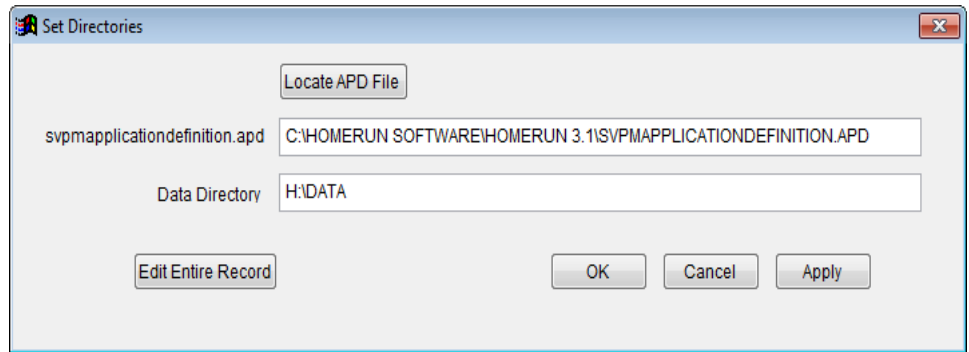
➤ To run Setup

1. **Before starting the Workstation install, you must map the HomeRun data path to the Server or Main computer.** Our recommendation is that you map drive "H" to the main HomeRun folder. You may use any drive letters you wish, however, it is a good practice from an administration point of view to map each workstation the same. If you don't know how to set up a Share on one computer and set up the mapping from other computers to this share, you may want to get a Computer Professional to do this for you.
2. Start Microsoft Windows. Close all other Windows applications
3. **Installation from downloaded file:** Run the HRSTATIONSETUP.EXE file that you downloaded from the web.

The steps from here are the same.

4. Setup displays a Dialogue box telling you that it will install HomeRun in the C:\HomeRun Software\HomeRunXL3 directory.

5. Follow the instructions on the screen
6. After setup is completed, the Workstation setup screen comes up. Enter the path to the Data and Report folders. Assuming that you mapped Drive H to the Homerun folder on the server, your entries should look something like this. When you are finished entering the information, Click *Apply* and then *OK*.



7. Setup ends. You'll see a Windows Start menu entry for HomeRun. A shortcut will also be placed on your Desktop. You can now run HomeRun from the HomeRun Start menu or Desktop options.

What Setup Installs

HomeRun Directories for Single User/Server

For Single User or Network Installation on the Main or Server computer, Setup creates a \HomeRunXL3 directory on your hard disk with the following subdirectories and copies the HomeRun files to these directories:

Subdirectory	Contents
\DATA	Table files used by HomeRun and applications.
\REPORTS	Report files used by HomeRun and applications.

HomeRun Directories for Network Users

Network Installation Setup creates a \HomeRun directory on your hard disk with the following subdirectory. The folders containing the Data and Reports will be located on the Server or Main computer.

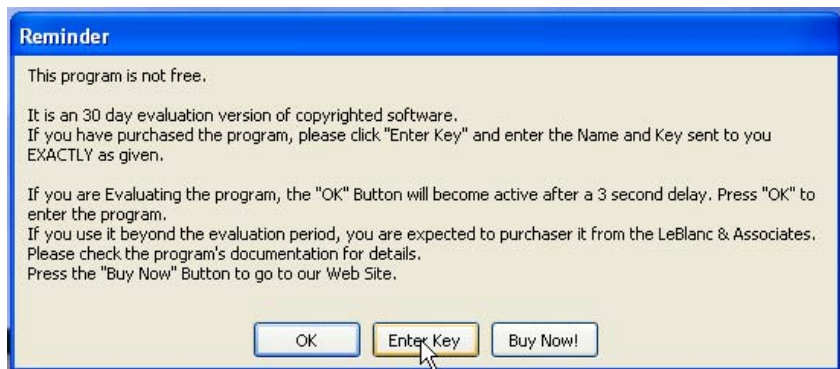
Subdirectory	Contents
\DOCUMENT	A copy of the manual in Adobe PDF Format.

Registering HomeRun to Use

Registering HomeRun is a 2-step process. The Process is the same for the Main/Single User or Workstation installation. All computers running HomeRun must be licenced.

➤ To Register HomeRun

1. When the Registration Form appears, click the Enter Key





2. Enter the Name and Key EXACTLY as given to you in appropriate box. You should use the Copy and Paste function to enter the information. Click OK.

Running HomeRun the First Time

Filling in the items under Company Menu Items under Admin Main Menu. This section is not required for Workstation setup.

To initialize HomeRun

1. From the Windows Start menu, start HomeRun by selecting the HomeRun menu option. If HomeRun doesn't run, review the proceeding "What Setup Installs" section.
2. When HomeRun XL 3.5 first starts, the Program Registration form is shown. See below on how to request Registration Keys. You can access or change your registration information by clicking on Help -> Registration on the main menu.
3. All of the items you need to initially fill out before you start using HomeRun will be found in the Admin->**Company Information** Menu Tab.
4. Fill out your company information in the Basic Company Information section. This is where the program gets the information to print on all forms used by this program.
5. Then fill in the Numbers Used section. Default numbers have been entered so you can start using the program right away. Change these numbers as appropriate.
6. Then enter in the Information on all your Employees especially the **Salesperson Licence Number**. You can access the Employees screen by Clicking on Data ->Employees -> Employees from the main menu.

After you initialize HomeRun, you can run HomeRun at any time by Clicking the HomeRun icon on the Program Start Menu or the Desktop.

Performing Backup of Program and Data

As with all programs installed on your computers, it is necessary to perform data backups on a timely basis. This process can be as simple as copying the HomeRun XL 3.5 files from your hard drive to CD/DVD Disk or to USB Disks. Another option is to use backup software to automate the procedure. There is backup software installed in Windows. This will allow you to set up backups as sets and perform the backups to any media. The Windows supplied program is a simple and difficult program to use.

We are using the Professional program from Genie-Soft and have been using it for many years.

You can find information on Genie Backup Manager 9.0 Pro at

http://www.genie9.com/business/genie_soft_business_solutions.aspx

It is always best to backup or copy the entire HomeRun XL 3.5 folder. In this way, you will have the complete backup to restore in the case of disk failure or corruption. The least you should backup is the the Data Folder. Assuming that you have installed the program with the defaults, you can find the program and data under C:\HomeRun Software\HomeRun XL 3.5

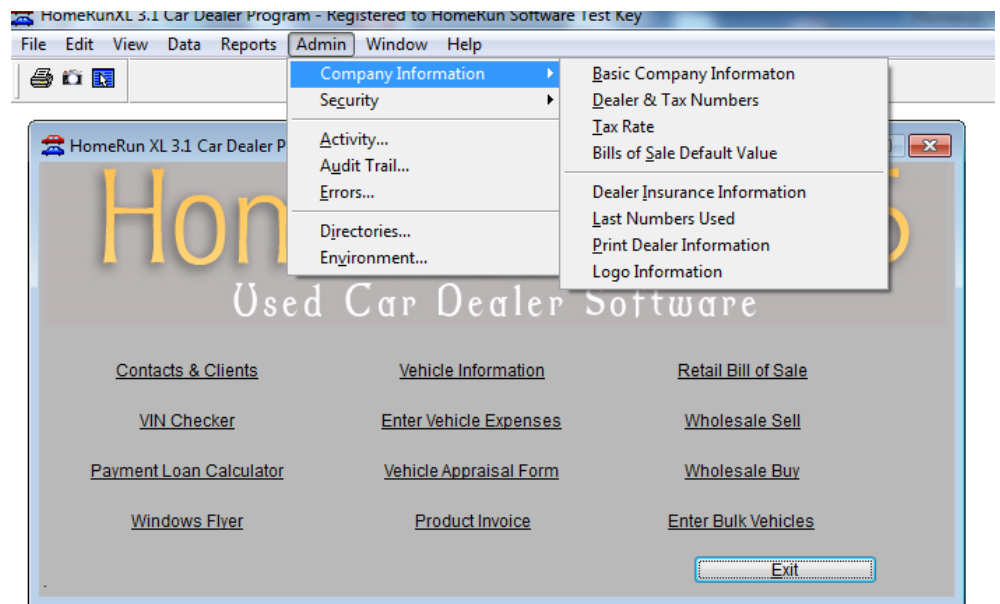
Here are some of the horror stories we get regarding backup ... or lack thereof:

- Our Office was broken into last night (or on the weekend) and someone stole all of our computers.
- Another tale of woe is that the Hard Drive crashed and all of their data is now gone. We're sorry to tell you that there is nothing we can do to help recover your data.

Setup

HomeRun XL 3.5 Setup

HomeRun XL 3.5 Car Dealer Software includes Administrative Tools that help you manage HomeRun XL 3.5 Car Dealer Software and monitor your use of it.



The options on the HomeRun XL 3.5 Car Dealer Software Admin menu allow you to control and use the Administrative Tools.

The most important area for you to initially set up is the Company Information items found on the Admin Menu.

Detail instructions for each of these items are shown later in this manual.

The following items should be filed in BEFORE going further with the program.

1. **Basic Company Information:** Enter your address and telephone numbers.
2. **Dealer & Tax numbers:** Enter these numbers. This is where we get this information to display in the Bills of Sale.
3. **Tax Rate:** Simply review these. They should be accurate but check them to be sure.
4. **Bill of Sale Default Values:** If you always have certain charges on all Retail Bill of Sale, filing them in here will ensure they are not missed. The values entered here will automatically be entered when you enter a new Bill of Sale.
5. **Last Numbers Used:** HomeRun keeps track of your last sales numbers, stock numbers etc...and increments them as required.

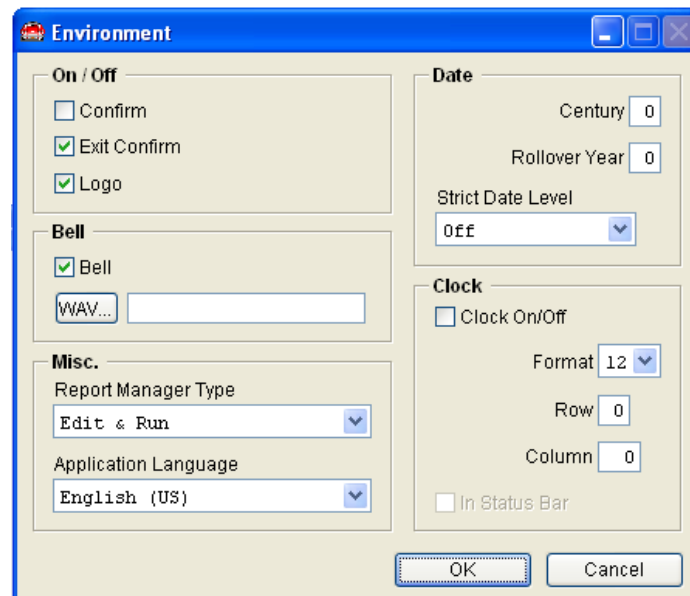
6. **Logo Information:** If you intend of using your logo on your Retail Bill of Sale, you must fill out this information.

Important: After you install HomeRun XL 3.5 Car Dealer Software, visit the Admin menu to set up the Administrative Tools as you prefer.

The tools you may want to set up before you begin using HomeRun XL 3.5 Car Dealer Software are described below.

HomeRun XL 3.5 Environment

You can control the HomeRun XL 3.5 environment through the Environment option on the Admin menu.



The Environment dialog lets you customize the HomeRun XL 3.5 environment.

The environment settings are described below. You can change the environment settings as needed.

Confirm

Specifies whether the Enter or Tab key must be pressed to exit an input field on a form. When Confirm is checked, you must press Enter or Tab to move to the next object on a form. When Confirm is unchecked and the cursor reaches the last character in an input field, the cursor moves to the next object and the bell sounds if the Bell check box is checked.

By default, Confirm is unchecked.

Exit Confirm

When you exit HomeRun XL 3.5, a dialog appears to confirm your exit. This dialog prevents accidentally exiting HomeRun XL 3.5. However, some people are annoyed by the confirmation dialog. If you're in the latter group, you can turn off the exit confirmation by unchecking the Exit Confirm check box.

Clock

If you want to display a clock in the HomeRun XL 3.5 window, you can choose the row and column for the clock's display. You can also choose to display the clock in the status bar.

Bell

Turns your computer bell on and off. If the Bell check box is checked, your computer bell will sound during editing when you reach the end of a field or enter invalid data.

Date

Specifies the format for the display of dates on forms. The default format is American (mm/dd/yy). The drop down combobox lets you choose different formats based on country or the placement of mm, dd and yy.

The Separator specifies the character that separates mm, dd and yy in the date format selected. The default Separator is “/”.

- **Century:** A number from 1 to 99 that specifies the current century. When a date in HomeRun XL 3.5 has a two-digit year, the Century entered determines in which century the year occurs.

Rollover Year: Determines whether the year is in century or the century following this Century. A number from 0 to 99 that specifies the year equal to and above which is the current century and below which is the next century. The default value is the last two digits of the current year plus 50 years - if the current year is 1998, Rollover Year is 48, the last two digits of 2048 (1998 + 50). Note that the rollover value only determines the century for a date entered without a century portion - an ambiguous date format that is not recommended. For example, if the current year is 1998 and Rollover Year is the default (48), any date entered without a century portion and a year of 48 or greater is considered to be in the current century (the 20th century). Any date entered without a century portion but with a year before 48 is considered to be in the next century (the 21st century).

Report Mgr Type

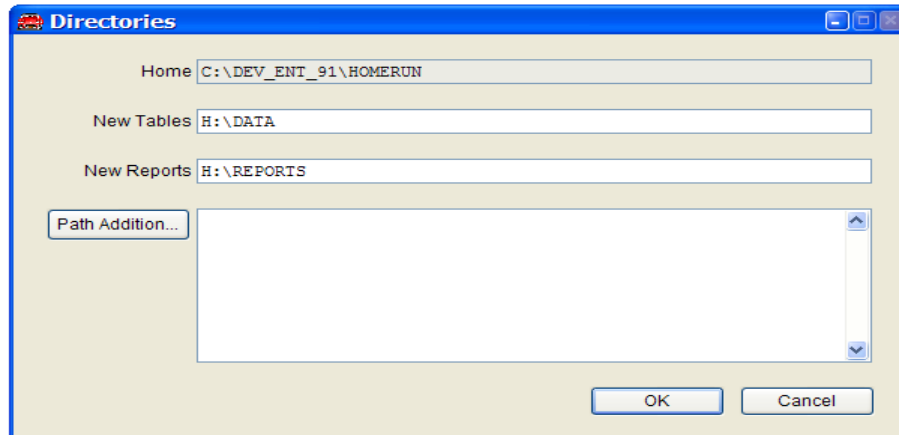
Currently we do not use the Report Manager. All the reports you will require can be accessed from the “Report” Menu Item.

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Directories

The Directories option on the Admin menu displays the HomeRun XL 3.5 Home, Tables and Reports directories.

Tables: A table is a special type of file used to hold HomeRun XL 3.5 data.



Tip: You can use the Directories dialog to change the Tables and Reports directories. You may want to change the Tables and Reports directories if you need to share HomeRun XL 3.5 data files with other users on a Local Area Network (LAN) - see below.

Home Directory

The HomeRun XL 3.5 Home directory is where the main HomeRun XL 3.5 files were placed when you installed HomeRun XL 3.5. You cannot change the HomeRun XL 3.5 Home directory through the Directories dialog.

Tables and Reports Directories

HomeRun XL 3.5 automatically stores any new tables and reports you create in the Tables and Reports directories. You can change the Tables and Reports directories by entering new directory paths in the Tables and Reports fields on the Directories dialog. If the new directories you enter don't exist, HomeRun XL 3.5 will create them for you.

By default, the Report Directory is empty. All of the reports are compiled and included within the HomeRun EXE file.

When would you want to change the Tables and Reports directories? You may want to change the Tables and Reports directories when you install HomeRun XL 3.5 on a LAN and need to share data files among users on LAN workstations. See the next section for a complete discussion of this LAN topic.

Installing HomeRun XL 3.5 on a LAN

HomeRun XL 3.5 is a multiuser application. That means more than one user or workstation on a LAN can access and share the same HomeRun XL 3.5 files. Here's how we recommend that you set up HomeRun XL 3.5 so that more than one user can access data and report files at a time.

➤ **To Set Up HomeRun XL 3.5 on a LAN**

1. Install HomeRun XL 3.5 on each LAN workstation's local hard drive using the workstationsetup.exe
2. At the end of the set up process, you will be prompted for the location of the data and report folder. This is a prerequisite for HomeRun to be able to run from a workstation.
3. If you have missed this step, use Windows Explorer to get to the Folder/Directory where you installed HomeRun on the workstation. If you accepted the default folder location during the set up, this would be C:\HomeRun Software\HomeRunXL3.5. Run the file set_directories.exe

Review

In the next chapter, we'll go over some basic mechanics that will help you understand and use HomeRun XL 3.5 better. Before we do that, let's take a moment to review what we've learned in this chapter. Here are some important points that we would like you to remember.

- HomeRun XL 3.5 includes Administrative Tools that help you manage and monitor your use of it.
- You access the Administrative Tools through the Admin menu.
- You can turn many of the Administrative Tools on and off through the Admin Tools option on the Admin-Security menu.
- HomeRun XL 3.5 Security gives you greater control over who can access HomeRun XL 3.5 and what they can access. See the *Security* chapter for all the details.
- You can customize the HomeRun XL 3.5 environment through the Environment option.
- If you are installing HomeRun XL 3.5 on a LAN, the Directories option lets you tell each workstation where shared data and report files are located.

To see more detail about the topics covered in this chapter, refer to the appropriate chapters elsewhere in this *User's Guide*.

Using HomeRun XL 3.5

Some Things You Should Know

There are some things you should know before you begin using HomeRun XL 3.5

When you first learned to drive a car, the main things on your mind were all the great places the car would take you and the freedom to go whenever you wanted. You quickly learned, however, that there were some basic, mechanical things you needed to know before you could drive your car anywhere.

So it is with HomeRun XL 3.5 You want to jump right in and start using HomeRun XL 3.5 However, there are some basic things that you need to know. This chapter identifies the basic mechanics that will help you understand and use HomeRun XL 3.5 better. You will get to your destination faster if you take the time to review what's here.

HomeRun XL 3.5 Toolbar

The HomeRun XL 3.5 Toolbar has buttons that let you quickly access special functions.

HomeRun
Toolbar



Button	Purpose
	Activates the Report Manager.
	Displays the HomeRun XL 3.5 Startup Form when accidentally closed (that is the screen above)
	Will print the current active screen or window

HomeRun XL 3.5 Form Toolbar Controls

HomeRun XL 3.5 forms have toolbar control push buttons. The toolbar control buttons let you view and manage data in tables.



The HomeRun XL 3.5 Form Toolbar

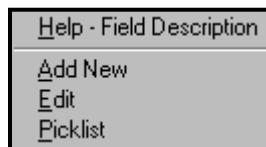
You need to learn how the toolbar control buttons operate. The *Data Entry* chapter lists the HomeRun XL 3.5 toolbar controls and describes how they operate. Please review the *Data Entry* chapter so you'll know how to use HomeRun XL 3.5 forms.

Shortcut Menus

When you right-click on a form or form field, HomeRun displays a shortcut menu of options appropriate for the form or field.



Forms Shortcut Menu



Fields Shortcut Menu

Escaping from Invalid Data

If you encounter an input field that fails validation while you're editing data on a form in HomeRun, you may press Esc to exit the HomeRun validation routine and cancel the data changes you made on the form.

Special Keys

The following table shows Function and Control key shortcuts that you can use while you're running HomeRun XL 3.5

Function and Control Key Shortcuts	
Key	Action
F1	Activates context-sensitive menu and screen help.
F2	Activates field help picklist for current field.
F3	Activates field help text for current field.
Alt + F3	For users with this permission, activates field help text for current field and lets user edit the text.

Ctrl + Y	Exit HomeRun XL 3.5
Ctrl + X	Cut.
Ctrl + C	Copy.
Ctrl + V	Paste.
Ctrl + B	Toolbar Parent Mode control.
Ctrl + F	Toolbar Find control.
Ctrl + H	Toolbar Locate control.
Ctrl + L	Toolbar List control.
Ctrl + I	Toolbar Filter control.
Ctrl + O	Toolbar Order control.
Ctrl + P	Toolbar Print control.
Ctrl + Home	Toolbar First record control.
Ctrl + PgUp	Toolbar Prior record control.
Ctrl + PgDn	Toolbar Next record control.
Ctrl + End	Toolbar Last record control.
Ctrl + N	Toolbar New control.
Ctrl + K	Toolbar Copy control.
Ctrl + U	Toolbar Edit control.
Ctrl + D	Toolbar Delete control.
Ctrl + G	Toolbar Group Delete control.
Ctrl + M	Toolbar More control.
Ctrl + E	Toolbar Save control.
Ctrl + T	Toolbar Cancel control.
Ctrl + F4	Toolbar Close control.

Where to Go from Here

Read the next chapter, *Overview*, to get an overview of how HomeRun XL 3.5

Overview

HomeRun XL 3.5 Overview

This chapter provides an overview of how HomeRun XL 3.5 will help you run your business. It also describes the HomeRun XL 3.5 interface and takes you on a brief tour of the HomeRun XL 3.5 menus. Later chapters describe each feature of HomeRun XL 3.5 in more detail.

Read the “What is HomeRun XL 3.5” section for an overview of how HomeRun XL 3.5 does its job and what it can do for you. Skim the “HomeRun XL 3.5 Interface” section to get a feel for how the HomeRun XL 3.5 menus are organized. Then, use the “HomeRun XL 3.5 Interface” section as a quick reference to the purpose of each HomeRun XL 3.5 menu option.

What is HomeRun XL3.5?

HomeRun XL 3.5 is your complete sales and management tool.



HomeRun performs the following major functions:

- **Manage Client Contacts**

HomeRun will allow you to manage all your business contacts.

- **Manage your Vehicle Inventory**

HomeRun will allow you to manage your Car Inventory. You will be able to track all the expenses associated with any of your current and previous car inventory.

- **Retail Bill of Sale**

HomeRun will allow you to enter and track Bill of Sale for Vehicles sold. It will also allow you to print professional looking Bills of Sale.

- **Manage after Sales Products**

HomeRun will allow you to keep track of the items you keep in stock that you sell to your Clients. Also, HomeRun allows you to invoice these items.

- **Manage the Selling and Buying of Wholesale Vehicles**

HomeRun allows you to produce Purchase Agreements for your Wholesale Purchase of Vehicles. Also, when you sell cars to other dealers, HomeRun allows you to produce and keep track of these sales.

- **Windows Flyers**

HomeRun allows you to produce Windows Flyers detailing information about any vehicle in your inventory.

- **Vehicle Appraisals**

HomeRun allows you to produce Vehicle Appraisals for a fee and print a appraisal for a Client.

- **Payment Loan Calculator**

HomeRun allows you to calculate various loan and payment options for your Clients prior to producing the Retail Bill of Sale.

- **Floor Plan**

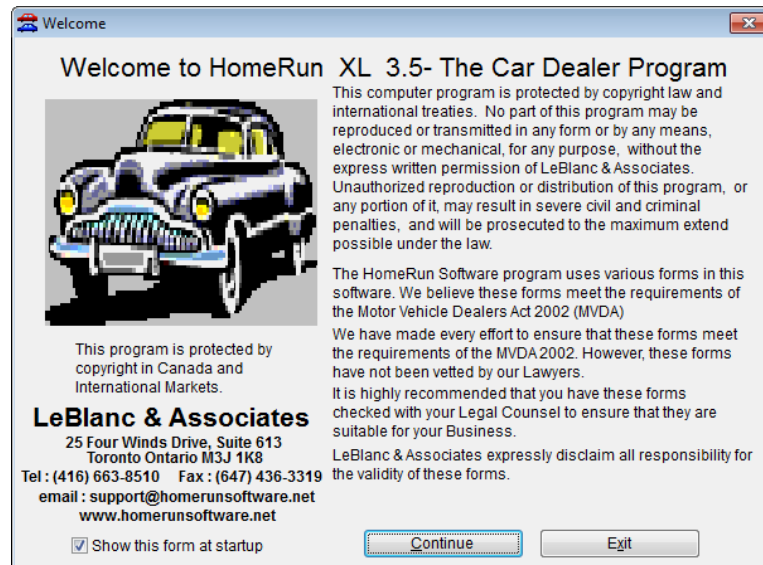
HomeRun allows you to enter and track vehicles that belong to various floor plans and to produce reports based on various criteria

Why You Need HomeRun XL 3.5

In today's complex business environment, it is becoming more difficult to consistently produce profitable sales. HomeRun allows you to Professionally Manage your entire operation from Sales Leads to completed Sale.

HomeRun XL 3.5 Welcome Form

When you run HomeRun XL 3.5, you'll first see the HomeRun XL 3.5 Welcome Form.

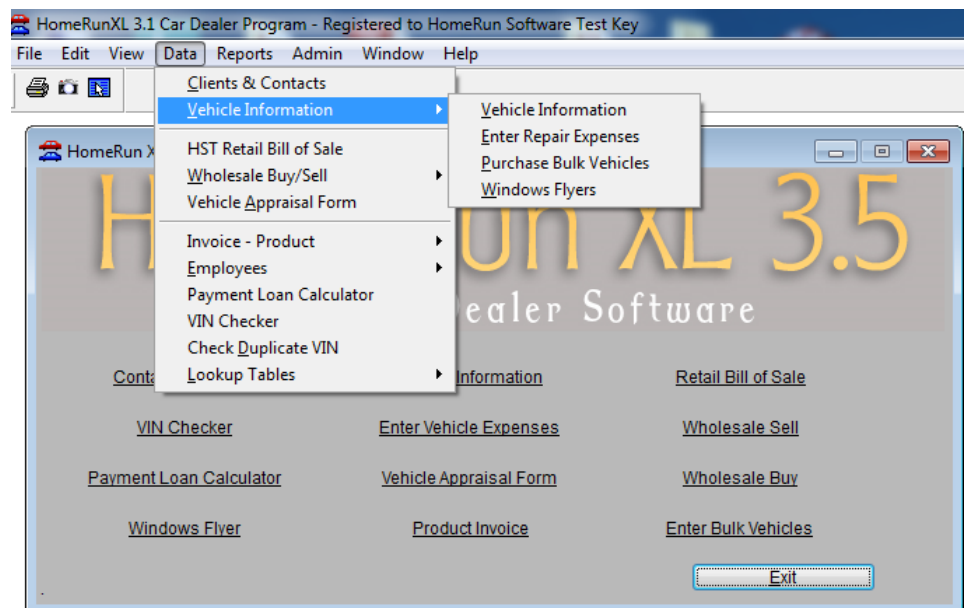


Click Continue to enter HomeRun XL 3.5 Click Exit to leave.

If you want to redisplay the Welcome Form while you are using HomeRun XL 3.5, select the Welcome Form option on the HomeRun XL 3.5 Help menu.

HomeRun XL 3.5 Menu

The HomeRun XL 3.5 menu organizes your access to HomeRun XL 3.5



The HomeRun XL 3.5 menu offers many options. The following sections provide an overview of each menu. Use these sections as a reference guide to the menu options.

File Menu

The following table briefly describes the File menu options.

File Menu	
Option	Purpose
Reindex/Pack Tables	Utility to reindex and pack HomeRun XL 3.5 tables. This procedure should be performed every few weeks.
Exit	Closes HomeRun XL 3.5 If the Exit Confirm box is checked on the Admin menu Environment dialog, a dialog appears to confirm the intent to exit.

Edit Menu

The following table briefly describes the Edit menu options.

Edit Menu	
Option	Purpose
Undo	Cancels the last text change in a field, record or file.
Redo	Reverses the last undo.
Cut	Removes text from a field, record or file and places it on the clipboard.
Copy	Copies selected text to the clipboard.
Paste	Inserts a copy of the clipboard contents into the current field or file.
Clear	Clears, or deletes, selected, or highlighted, text.
Select All	Selects, or highlights, the entire contents of a field.
New	Form Toolbar control. Displays blank form fields for adding a record to a table.
Copy	Form Toolbar control. Copies the current record and displays the copy for editing. Used to add a record and carry values from the current record to the new record.
Edit	Form Toolbar control. Puts form in edit mode for forms that have an edit mode.
Delete	Form Toolbar control. Deletes the current record from the table.
Group Delete...	Form Toolbar control. Brings up the Group Delete dialog for deleting records using condition expressions created by the user. Deletes all records meeting the conditions entered.
More	Form Toolbar control. After entering a new record, clicking the More control saves the record and adds a new blank record.
Save	Form Toolbar control. Saves data entered while adding,

	Copying or editing a record and ends the add or Copy.
Cancel	Form Toolbar control. Cancels data entries and changes made while Adding, Copying or editing a record and terminates the Add or Copy.
Close	Form Toolbar control. Closes the current form.

View Menu

The following table briefly describes the View menu options.

View Menu	
Option	Purpose
Parent Mode	Form Toolbar control. Turns Parent Mode on and off for child forms.
Find...	Form Toolbar control. Brings up the Find dialog for finding a record.
Locate...	Form Toolbar control. Brings up the Locate dialog for locating records.
List...	Form Toolbar control. Provides a picklist grid with incremental search and sortable columns for finding records quickly and easily.
Filter...	Form Toolbar control. When no record filter is set, brings up the HomeRun XL 3.5 Condition Builder for creating a record filter. Otherwise, turns filter off.
Order...	Form Toolbar control. Lists the table's index tag descriptions for selecting the record display order.
Print	Form Toolbar control. Displays the HomeRun XL 3.5 Report Manager.
First	Form Toolbar control. Displays the first record in a table as defined by the record Order and Filter.
Prior	Form Toolbar control. Displays the prior record in a table as defined by the record Order and Filter.
Next	Form Toolbar control. Displays the next record in a table as defined by the record Order and Filter.
Last	Form Toolbar control. Displays the last record in a table as defined by the record Order and Filter.

Data Menu

The Data Menu provides access to the data entry forms in HomeRun XL 3.5

Data Menu	
Option	Purpose
Clients & Contacts	Enter & View Contacts and Client Information
Vehicle Information ►	Displays the options for displaying Vehicle Information
Vehicle Information...	Displays the Vehicle Information Form
Enter repair Expense...	Displays the form to enter and manage Vehicle repair expenses
Purchase Bulk Vehicle...	Displays the form to enter bulk vehicle purchases.
Windows Flyers	Displays the form to allow you to produce Windows Flyers
Trade-In Information	Displays the form to allow you to produce Trade-in Information on your trade vehicles.
Retail Bill of Sale	Displays the Retail Bill of Sale form
Wholesale Buy/Sell ►	Displays the options for the Wholesale Buy and Sell options.
Purchase Wholesale	Displays the Wholesale Purchase Form.
Sell Wholesale	Displays the Wholesale Sales Form.
Employees ►	Displays the options to manage Employee Information
Employees...	Displays the form to manage Employee information
Employee Position...	Displays the lookup table to allow you to enter employee title or position which is used in the main Employee information form
Payment Loan Calculator	Displays the Loan Calculator Form
VIN Checker	Displays the form that allows you to check the validity of a VIN.
Check Duplicate VIN	Displays the form to allow you to check if a particular Vehicle is in your Vehicle Table.
Lookup Tables ►	Displays the options to enter information to the lookup tables that are used within the program.

Reports Menu

The Reports menu provides access to the HomeRun XL 3.5 Report Manager and to reports run from menu options.

The following table briefly describes the Reports menu.

Reports Menu	
Option	Purpose
Inventory Listing	Displays the form to run the Inventory Listing Report
Delivery Schedule	Displays the form to run the Delivery Schedule
Inventory Valuation Report	Displays the form to run the Inventory Valuation Report
Sales Reports	Display the form to run the various Sales Reports
Purchase & Tax Reports ►	Displays Tax Report Options
...Wholesale Purchase Sales Tax Report...	Prints the Wholesale Sales Tax Report
...Wholesale Sell Tax Report	Prints the Wholesale Sell Tax Report
...Retail Sales Tax Report	Prints the Retail Sales Tax Report
Garage Register	Prints the Garage Register
Sales Followup Report	Prints the Sales Followup Report.
Sales Comparison Report	Prints the Comparison Report which will allow you to compare sales for various periods.
Vehicle Expense Report	Prints the Vehicle Expense Report.
Report Manager...	We have left this in for legacy report purposes and are not currently using it.

The HomeRun XL 3.5 Report Manager is described in detail in the *Reports* chapter.

Admin Menu

You manage and control HomeRun XL 3.5 through the Administrative Tools found on the Admin Menu.

The following table briefly describes the Admin menu options.

Admin Menu	
Option	Purpose
Company Information	This menu item displayed the company setup information
...Basic Company Information	This item allows you to enter and maintain your Address and Telephone Numbers.
...Dealer & Tax Numbers	This item is where you enter your Dealer RIN and other numbers
...Tax Rate	This is where the tax rates charged by the program are read from. As tax rates change, this is the location where you change them.
...Dealer Insurance Information	This is the location where you enter your insurance information. This information is used when you use the “Print Dealer Information” report below
...Last Numbers Used	This is where you maintain the numbering sequence for Stock Number and Bill of Sale.
...Print Dealer Information	This allows you to print your Dealer Information when you have to give this information to suppliers.
Logo Information	Allows you to enter the name & location of the logo to use on Retail Bill of Sale.
Security ►	Displays the Security Menu Options
...Users	Displays the User Form
...Passwords	Displays the Password Form
...User Reports	Displays the User Reports
...Password Reports	Displays the Password Reports
...Control Permission Groups	Displays the Control Permission Form
...Field Permission Groups	Displays the Field Permission Form
...Menu Permission Groups	Displays the Menu Permission Form
...Admin Tools	Displays the Security Admin Tool Form
Activity	Displays the Program Activity Report Form
Audit Trail.	Displays the Program Audit Trail Report Form
Errors...	Lists errors that occurred while users worked in HomeRun XL 3.5
Directories...	Display's HomeRun XL 3.5 directories and allows the HomeRun XL 3.5 tables and reports directories

to be changed.

Environment...

Enables setting of system and environment parameters for HomeRun XL 3.5

Window Menu

The Window menu lists the forms, or windows, that you have opened in the HomeRun XL 3.5 Desktop window.

Help Menu

The HomeRun XL 3.5 Help menu contains options for accessing HomeRun XL 3.5 Help. The Help menu also provides access to desk accessories, such as a Filer, Calculator and Calendar/Diary.

The following table briefly describes the Help menu options.

Help Menu	
Option	Purpose
HomeRun User Manual	Runs the User Manual
About...	Displays information about HomeRun XL 3.5
Startup Form	Displays the Startup Form.
Registration Information	Displays the Registration Information Form.
Welcome Form...	Displays the HomeRun XL 3.5 Introductory Form.
Calculator	Displays a Calculator for basic mathematical operations. Can cut and paste results.
Calendar/Diary	Displays a Calendar/Diary for appointments and notes.

Data Entry

Overview

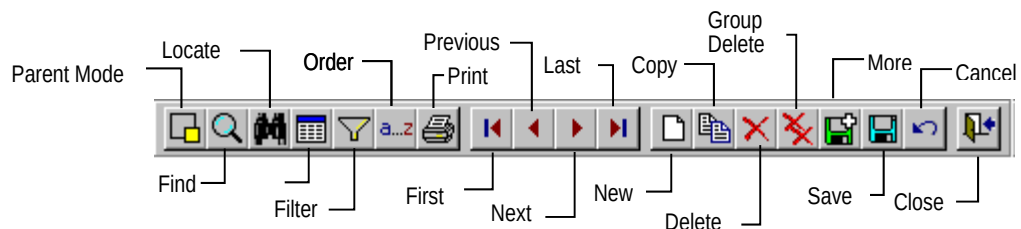
This chapter begins by explaining how to use the HomeRun XL 3.5 Form Toolbar controls. The Form Toolbar controls let you select records, navigate among records and update records on a form.

Then, the chapter describes how to use the HomeRun XL 3.5 data maintenance forms.

Form Toolbar Controls

The HomeRun XL 3.5 Form Toolbar provides controls that let you view and manage the data in the HomeRun XL 3.5 tables.

HomeRun XL 3.5 toolbar controls let you navigate through the records, search for records, change the record order, add records, delete records and save changes to records. The control buttons have pictures, or icons, that represent their functions. The HomeRun XL 3.5 Form Toolbar controls are shown below. Note: Holding your mouse cursor over any toolbar buttons will display a description of these buttons.



The next two pages provide brief descriptions of each Form Toolbar control. The Find, Locate, Filter, Order, and Group Delete controls are described in more detail in following sections.

Editing Data

When a form is activated in HomeRun XL 3.5, you may enter changes directly into the fields on the form. You click the Save button on the toolbar to save your changes. If you try to leave the current record without saving your changes, HomeRun XL 3.5 prompts you to save your changes.

Toggle Controls

The Parent Mode and Filter buttons are toggles. As described in the table on the following pages, the pictures on these controls change to show whether the status of the control is On or Off.

Toolbar Menu Options

The Edit and View menus contain options for each Form Toolbar control. Toolbar controls that change data are on the Edit menu. Toolbar controls that help you navigate among data are on the View menu.

The Edit and View menus display shortcut keys you can use to select a Toolbar control instead of clicking it with your mouse. The shortcut keys are listed in the *Using HomeRun XL 3.5* chapter.

HomeRun XL 3.5 Toolbar Controls		
Picture	Control	Purpose
	<u>Record Selection Controls:</u>	The record selection controls allow you to choose the table records displayed and to set the display order.
	Filter - Off	Brings up the HomeRun XL 3.5 Condition Builder for creating a record filter. When a filter is created, only records that satisfy the filter condition are displayed, and the Filter button toggles to the Filter On picture shown below. When the Filter Off picture is displayed, no record filter is in effect.
	Filter - On	Turns filter off. When the Filter On picture is displayed, a record filter is in effect.
	Order	Lists the table's index tag descriptions for selecting the record display order.
	<u>Navigation Controls:</u>	The navigation controls move through the records in a table and locate specific records. As you navigate through the records in a table, the Order selected and the Filter in effect, if any, to determine how the table appears to the navigation controls.
	Find	Brings up the Find dialog for finding a record using the table's primary key or the current Order index key. If a partial key is entered, all records matching the partial key are displayed in a Browse for user selection.
	Locate	Brings up the Locate dialog for locating records using condition expressions created by the user. Displays all records meeting the conditions in a Browse for user selection.
	List	Provides a picklist grid with incremental search and sortable columns for finding records quickly and easily.
	First	Displays the first record in a table as defined by the record Order and Filter.
	Prior	Displays the previous record in a table as defined by the record Order and Filter.
	Next	Displays the next record in a table as defined by the record Order and Filter.
	Last	Displays the last record in a table as defined by the record Order and Filter.

HomeRun XL 3.5 Toolbar Controls		
	Control	Purpose
	<u>Data Update Controls:</u>	You use data update controls to maintain the data in a table. As you update the data, a record of the update is entered in the Audit Trail if the Audit Trail tool is on.
	New	Displays blank form fields for adding a record to a table. If the form is a child in a Related Forms group, the primary key fields in the parent record are automatically entered into the foreign key fields of the new child record.
	Copy	Copies the current record and displays the copy for editing. Used to add a record and carry values from the current record to the new record.
	Delete	Deletes the current record from the table. Relational Integrity is enforced.
	Group Delete	Brings up the Group Delete dialog for deleting records using condition expressions created by the user. Deletes all records meeting the conditions entered. As records are deleted, the Audit Trail is updated and Relational Integrity is enforced.
	More	After entering a new record, clicking the More control saves the record and adds a new blank record.
	Save	Saves data entered while adding, Copying or editing a record and ends the add or Copy.
	Cancel	Cancels data entries and changes made while Adding, Copying or editing a record and terminates the Add or Copy.
	<u>Related Forms Controls:</u>	
	Parent Mode - Off	Turns Parent Mode on for child forms. While Parent Mode is on, the record selection and navigation controls operate on parent records. When the Parent Mode - Off picture is displayed, Parent Mode is not in effect.
	Parent Mode - On	Turns Parent Mode off. While Parent Mode is off, the record selection and navigation controls operate on child records. When the Parent Mode - On picture is displayed, Parent Mode is in effect.
	<u>Close Control:</u>	
	Close	Closes the form.

Required Fields

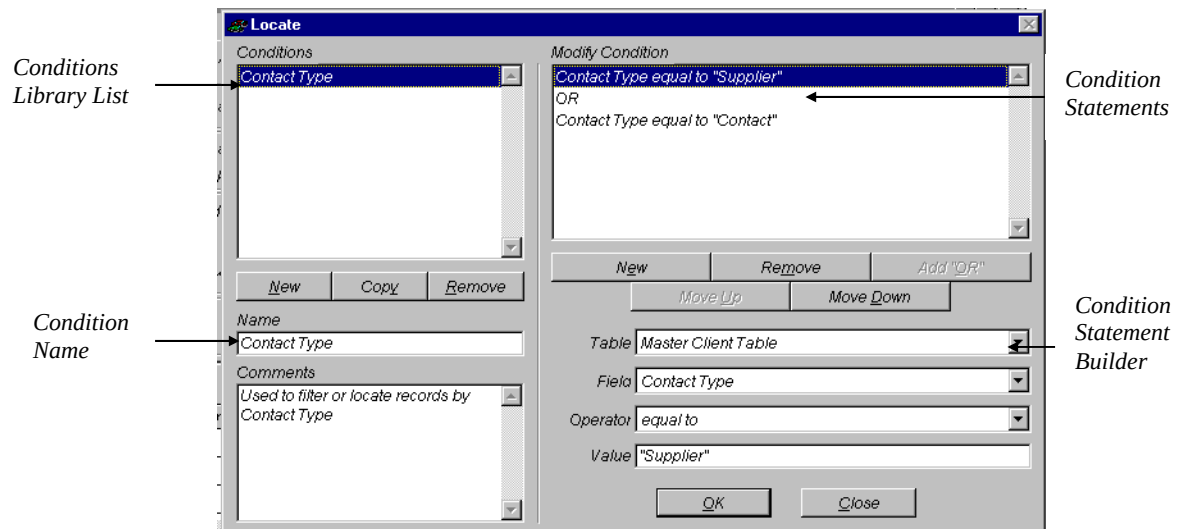
Some Fields on forms are designated as Required Fields and must be filled in before a record can be saved. These fields are shaded light yellow on the forms. Some of the

fields that are required are Enter Date on Bill of Sale

Sold Date 10/02/2007

HomeRun Condition Builder

The HomeRun *Condition Builder* is an interface used with the *Form Toolbar Locate*, *Filter* and *Group Delete* controls and the *Report Setup Dialogue's* *For* and *While* options.



The *Condition Builder* allows you to construct simple and complex conditions to locate, filter or delete records on a form. The *Condition Builder* lets you create conditions to select the records that will appear in a report.

Conditions Library: The Condition Builder allows you to store, maintain and recall a library of frequently used conditions for each form and report. What's more if you turn on *User Access Security*, each user can build her own library of conditions. In short, you can create condition libraries by form, report and user.

How to Use the Condition Builder: The *Condition Builder* provides a list of fields for a form or report. You build a new condition by building condition statements from the fields provided. To build a condition statement, you select a field from the Condition Builder's *Field* list, select an operator (such as, "equal to", "less than", etc.) that compares a value to the field, and enter the value for the comparison. The "How You Use the Condition Builder" section below provides step-by-step instructions for using the Condition Builder.

How You Access the Condition Builder

The HomeRun *Condition Builder* allows you to build a set of logical field conditions to be used to select records for a form or report. The way the conditions are used depends on how you access the *Condition Builder*, as follows:

- **Toolbar Locate:** When you click the *Form Toolbar Locate* control, HomeRun displays the *Condition Builder*. After you build a condition and click OK, the condition you build is used to locate records that match the condition. If more than one record matches the condition, all matching records are displayed in a grid. If you select a record in the grid, the selected record becomes the current record on the form.

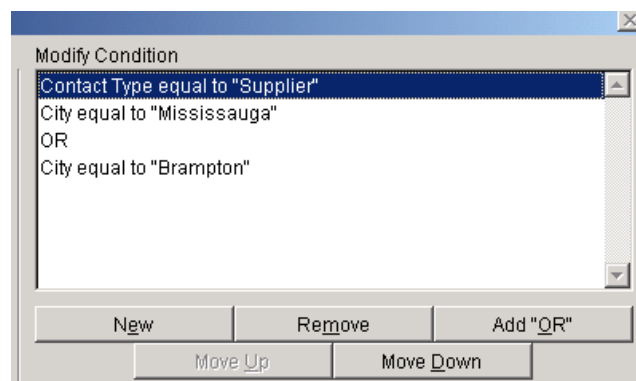
- **Toolbar Filter:** When you click the *Form Toolbar Filter* control, HomeRun displays the *Condition Builder*. After you build a condition and click OK, the condition you build is used to apply a filter to the records displayed on the form. While the filter is in effect, only records that match the condition are displayed on the form.
- **Toolbar Group Delete:** When you click the *Form Toolbar Group Delete* control, HomeRun displays the *Condition Builder*. After you build a condition and click OK, the condition you build is used to select the group of records to be deleted. Only records that match the condition are deleted.
- **Report Setup For Option:** When you click the *For* check box on the *Report Setup Dialogue*, HomeRun displays the *Condition Builder*. After you build a condition and click OK, the condition you build is used to select the records displayed in the report. Only records that match the condition are displayed in the report.
- **Report Setup While Option:** When you click the *While* check box on the *Report Setup Dialogue*, HomeRun displays the *Condition Builder*. After you build a condition and click OK, the condition you build is used to select the records displayed in the report. Records that match the condition are displayed in the report until the first non-matching record is found. When the first non-matching record is found, the report terminates. If the first record is non-matching, no records are displayed in the report.

How You Use the Condition Builder

You use the *Condition Builder* to create a “Condition”. A Condition is a set of logical Condition Statements that will be evaluated together as one expression to select records.

The Condition Statements that you create for a Condition are listed in the *Modify Condition* box on the right side of the *Condition Builder*. A Condition consists of one or multiple Condition Statements. When a Condition is composed of more than one Condition Statement, the Condition Statements may be connected by an implicit logical AND operator or by an explicit logical OR operator. Condition Statements listed next to each other are assumed to be connected by an implicit AND operator. To connect Condition Statements by an OR operator, you must explicitly insert the OR operator by clicking the Add “Or” button below the *Modify Condition* box. The AND operator takes precedence over the OR operator.

As an example, let’s say you needed to apply a filter to the Client and Contact form in HomeRun. Let’s say your filter needs to select Suppliers located in either Mississauga or Brampton. Here’s what the Condition Statements would look like in the *Modify Condition* box on the *Condition Builder*:

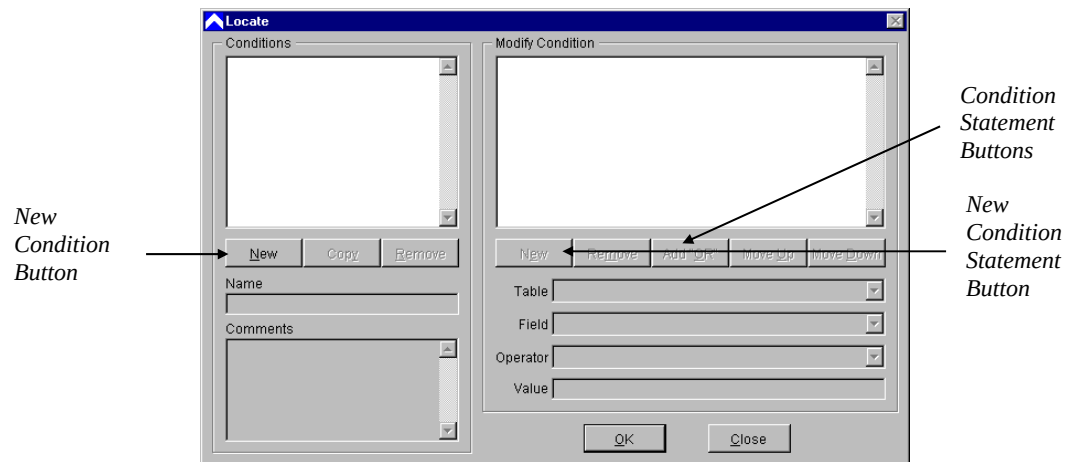


In plain English, these Condition Statements say “select a contact record (1) if the client type is Supplier and the client is located in the city equal to Mississauga or (2) the city is equal to Brampton. Notice that the AND operator is implied between Condition Statements that are not separated by the OR operator.

Now, let’s explore the ins and outs of building Conditions. The next section describes how to use the Condition Builder in detail.

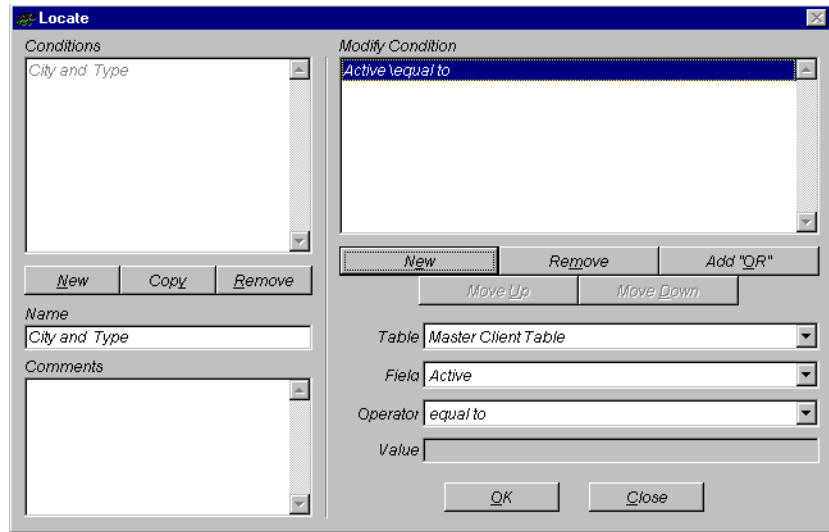
➤ **To use the Condition Builder**

1. When you select the *Toolbar Locate*, *Filter* and *Group Delete* controls and the *Report Setup Dialogue’s For* and *While* options, HomeRun displays the HomeRun *Condition Builder*. If you have not previously built and saved a condition, the *Condition Builder* looks like this:



The Condition Builder is divided into two columns. The left column lists the previously created and saved conditions in the condition library. The right column is used to build condition statements for a Condition.

2. **Starting and Naming a New Condition:** To build a new condition, click the *new condition* button in the left-side Conditions column. If you want to save your new condition in the Conditions Library, enter a unique name for the condition in the Name box. If you like, enter a brief description of the purpose of the condition in the Comments box.
3. **Starting a New Condition Statement:** Click the *New Condition Statement* button in the right-side Conditions Statement column. You can now access the *Table*, *Field*, *Operator* and *Value* boxes and the *Condition Statements* buttons to build a Condition Statement. The *Condition Builder* should now look something like this:



Notice that there's already a Condition Statement in the Modify Condition box. It's based on the first field in the Field list and the default Operator, which is "equal to". When you build your first Condition Statements, it will replace the Condition Statements you see now.

4. **Select Table/View and Field:** The next step in building a Condition Statement is to select the field for the statement. First, in the *Table combo box*, select the table that contains the field you want. Then, select the field in the *Field combo box*. The field you select will appear in the Condition Statement highlighted in the *Modify Condition box*.
6. **Select Operator:** Select an *operator* in the *Operator combo box*. The *operator* defines how the field will be used with the value you enter into the Value box. The *operator* you select will appear in the *Condition Statement* highlighted in the *Modify Condition box*. The following operators are available to you:

operator	operator
not equal to	
less than	
greater than	
less than or equal to	
greater than or equal to	
equal to	
exactly equal to	For Condition Statement to be true, Field and Value must not only be equal in value but must also be equal in length.
in	Enter comma-delimited list of values in Value box. For Condition Statement to be true, Field must contain one of the values in the list.
contains	Enter character string in Value box. Condition Statement is true if character string is contained anywhere within the Field.

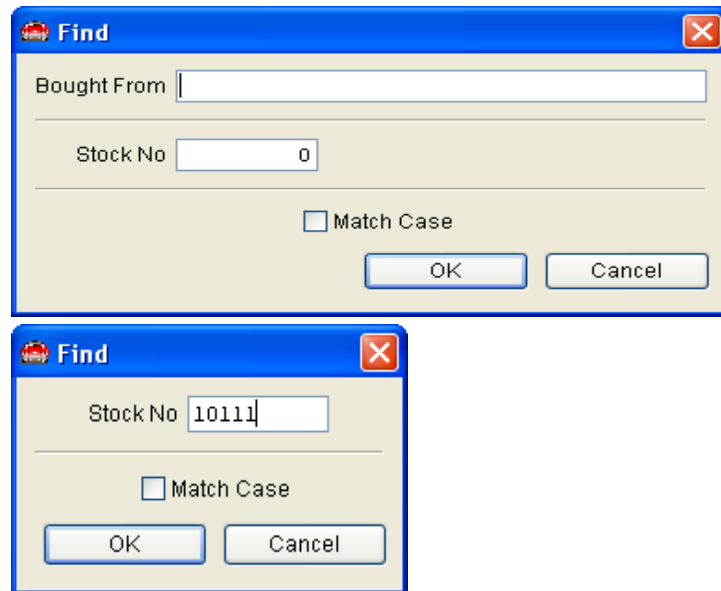
7. **Enter a Value:** Enter the value in the *Value* box that will be compared to the Field you selected. Do not enter delimiters such as quotes or braces. The *Condition Builder* will add quotes and braces as needed. Enter dates in the Date format specified on the Environment Dialogue accessed from HomeRun's Admin menu. By default a date should be entered in the mm/dd/yy format. The entry you make will appear in the *Condition Statement* highlighted in the *Modify Condition* box.
8. **Build Additional Condition Statements:** If the Condition you are building requires additional Condition Statements, repeat steps 3 through 6 above. If the next Condition Statement you create needs to be separated by the OR operator from the Condition Statement you just completed, click the Add "OR" button before clicking the New button to start the next Condition Statement.
9. **Adjust Condition Statements as Needed:** If you need to change the order of the Condition Statements, select the Condition Statements you want to move and click the *Move Up* or *Move Down* button. If you need to add an OR operator, select the Condition Statement that the OR should follow and click the Add "OR" button. If you need to remove a Condition Statement, select the statement and click the *Remove* button.
10. **Apply and Save Your Condition:** After you complete your set of Condition Statements, the *Condition Builder* should look something like this:

Click the OK button to apply your Condition. You will be prompted to save your Condition. If you save the Condition, it will appear in the Conditions list the next time you access the *Condition Builder* for the form or report. When the *Condition Builder* closes, your Condition will be used to select records for whichever Toolbar control or report option you selected to activate the Condition Builder.

11. **Using Conditions from the Conditions Library:** When you access the *Condition Builder* for a form or report for which you have previously built and saved Conditions, you can apply a saved Condition by simply selecting it in the *Conditions* list and clicking OK. You can also select the Condition and modify it before you apply it.

Find

When a user clicks the Find Toolbar control, HomeRun displays the Find dialog.



The Find dialog allows you to quickly find records for a table displayed on a form using either the table's current order key or primary key. The fields in the current order key are displayed in the top half of the Find dialog. The field(s) in the primary key are displayed in the bottom half. You can enter values into either key field to Find a record.

When you change the order of the records displayed on a form through the Order Toolbar control, the current order key fields are automatically changed the next time the Find dialog is displayed.

Use Match Case for a Faster Search

The Find dialog contains a Match Case check box that will cause the Find to perform a case-sensitive search for character fields. The case-sensitive search is much faster. However, to do a case-sensitive search, you need to know how the entries in the field you are searching are capitalized.

How the Find Control Finds Records

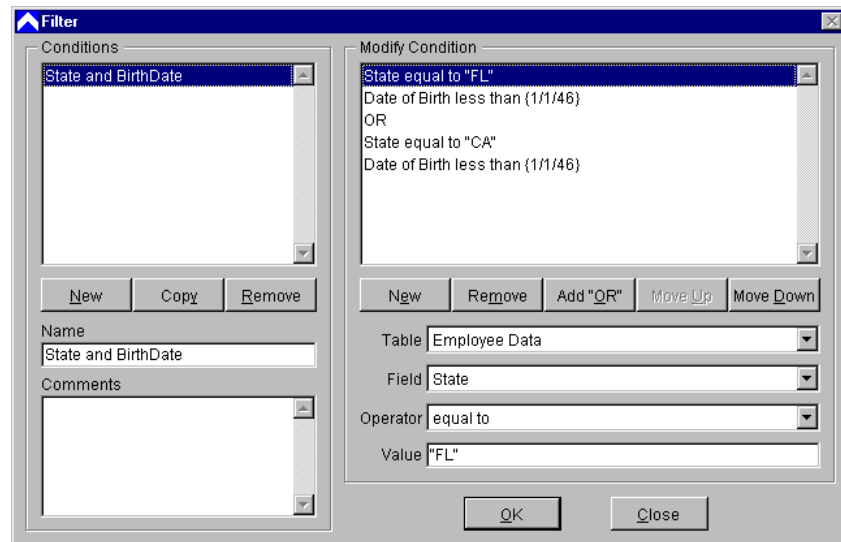
Partial Entries: The Find control finds records that match whatever characters you enter into the current order key or primary key fields. For example, using the Find dialog illustrated above, a partial entry of "B" in the Last Name field would find all records with a Last Name that began with "B".

Key Precedence: The Find control gives precedence to entries for the primary key. That is, if you make entries on the Find dialog for both the current order key and the primary key, the Find will find records that match the primary key entry. If no records match the primary key entry, the Find will find records, if any, that match the current index key entry.

Find Grid: If more than one record meets the search criteria entered, HomeRun displays all the records that meet the search criteria in a searchable, sortable grid. You can highlight a record and close the grid to display the record on the form. Using the Find dialog illustrated above, if an entry of "B" were made in the Last Name field, HomeRun would display the grid below.

Filter

When you click the Filter toolbar control, HomeRun displays the HomeRun Condition Builder.



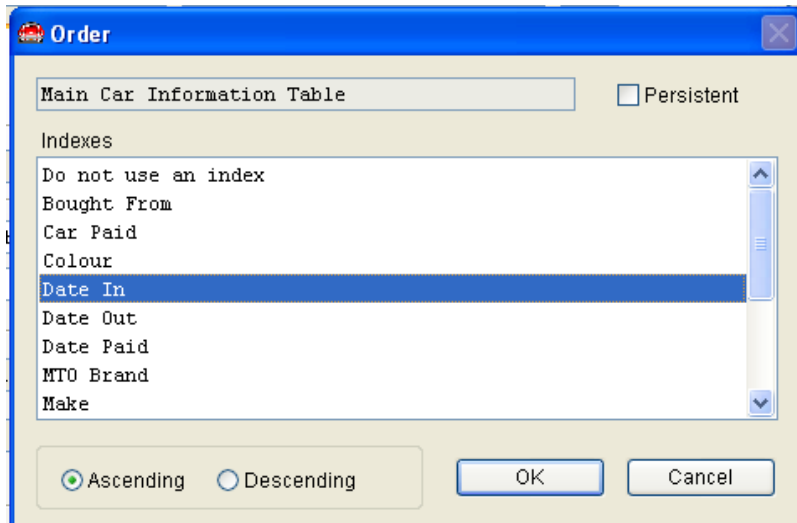
The Filter Condition Builder allows you to filter records using any fields in the Field list for the tables in the Table list.

See “HomeRun Condition Builder” on page 38 to learn how to use the Condition Builder with the Filter control.

When you complete building a Condition, clicking the OK button sets the filter on the active table or view. From that point, only records that meet the filter condition are displayed on the form.

Order

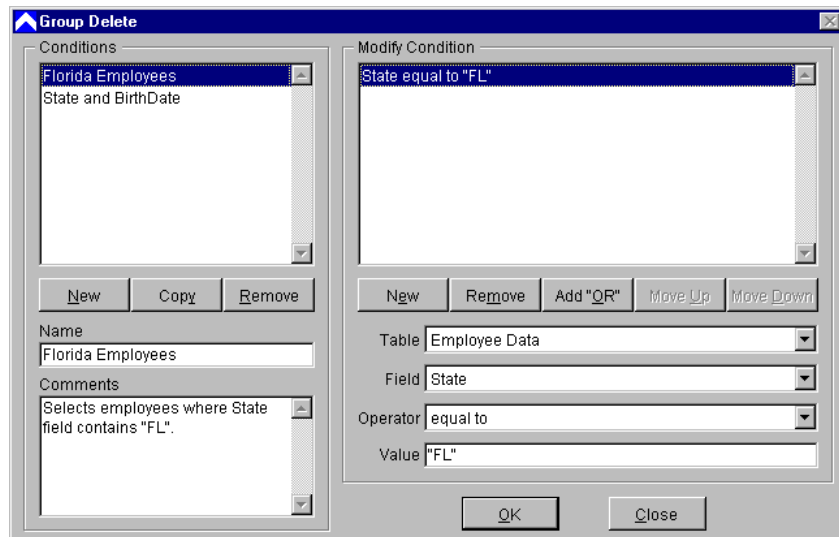
When you click the Order Toolbar control, HomeRun displays the Order dialog.



The Order dialog displays the record orders you can select for the table displayed on a form. The current order is highlighted. You change the order of the records on the form by selecting a different order. The order can be made ascending or descending through the option buttons on the Order dialog.

Group Delete

When you click the Group Delete toolbar control, HomeRun displays the HomeRun Condition Builder.



The Group Delete Condition Builder allows you to conditionally delete groups of records using any fields in the Field list for the tables in the Table list.

See "HomeRun Condition Builder" on page 38 to learn how to use the Condition Builder with the Group Delete control.

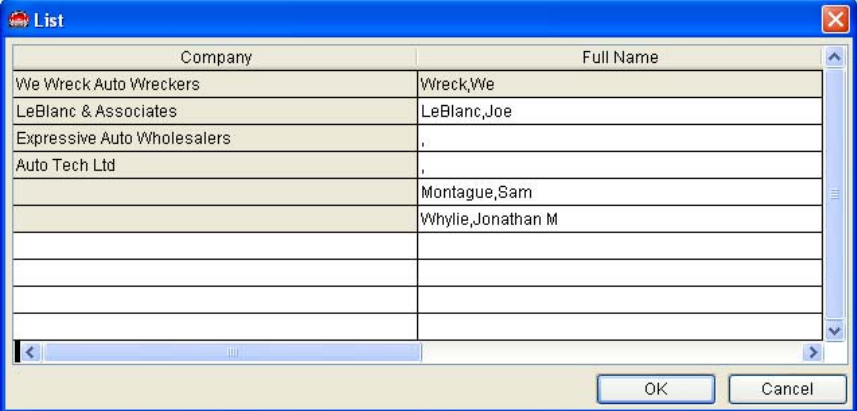
When you complete building a Condition, clicking the OK button executes the group delete. While HomeRun performs the group delete, it enforces referential integrity and maintains the audit trail. Consequently, the group delete process can seem slow if the active table or view is involved in a referential integrity relationship. As records are deleted, the number of records deleted appears in a wait window.

Tip: Pressing the Esc key terminates the group delete.

Client & Contacts

This is where you enter and manage all your Clients and Contacts.

When you click on the Menu Item, you will be offered a List Form. This allows you a quick way to find a particular or group of records.



The screenshot shows a window titled "List" with a table of client records. The table has two columns: "Company" and "Full Name". The records are as follows:

Company	Full Name
We Wreck Auto Wreckers	Wreck,We
LeBlanc & Associates	LeBlanc,Joe
Expressive Auto Wholesalers	,
Auto Tech Ltd	,
	Montague,Sam
	Whyllie,Jonathan M

At the bottom of the window are "OK" and "Cancel" buttons.

As you add more records, you will be presented with a larger list of all the records in the data table that match your request. Click on the label on the top of the column and type the start of the name you are searching for. If you were looking for LeBlanc & Associates, you could type the letter "L" and you will be taken to the beginning of the names that start with "L". Type the next letter "e" and so on to find your record. The Index order is incremental which allows you to quickly find the record you're looking for.

If you want to search for a record by a different field shown, Click on the field name at the top of that column. That field will become the active search field. Type the first few letter of name you want to find.

The Form is divided in 3 sections.

Main Information

The screenshot shows a software window titled "Clients and Contacts" with a sub-header "Howard Mortimer". It has buttons for "Print Vehicle History", "Print This Record", and an "Inactive" checkbox. The "Main Information" tab is selected, showing fields for Salesman (Sam McGee), Contact Type (Retail Cust), and Company Record (unchecked). Below these are fields for Salutation, Company, First Name (Howard), Last Name (Mortimer), Address (4568 Keele Street), City (Toronto), Province (ON), and Postal Code (M9N 1K4). There are also phone number fields with area codes (416) and (647), and extensions. A "Family" field is present. On the right, "Date Entered" and "Date Updated" are both 06/07/2013. At the bottom, "Last Purchase" is listed as "2003 Ford Edge Sale No 1001 Date: 06/08/2013". A "Vehicle History for this Contact" table is at the bottom with columns for Stock #, Alpha Stock, Trans Date, B/S, Year, Make, Model, VIN, and Sale No.

Stock #	Alpha Stock	Trans Date	B/S	Year	Make	Model	VIN	Sale No
2004		06/08/2013	WB	2005	Chrysler	Sebring	1C3EL56R45N684744	1001
2003		06/08/2013	RS	2010	Ford	Edge	2FMDK4KC8ABA10717	1001

The first one is for the “Main Information about the contact.

This is the part where you put all the main information about the contact

Note that the Down Arrow  next to a field denotes that you can pick a value from a pick list for this field. This allows you to enter constant values in that particular field without typing them in. You can also press F2 while your cursor is on this field, or, click the Right Mouse button to choose from a pick list.

If the record is a Company Record, check the Company Record. If this is a record for an individual, leave this field blank. This is used by the program when entering a “Retail Bill of Sale” to differentiate between a sale made to an individual or a company.

When entering a new Client, you can enter the **Salesperson** that either generated the lead or has been assigned to them. You access the *Salesperson table* by first clicking on the drop down button next to the *Salesperson Field*  and picking a salesperson from the list. If the name of the Salesperson is not in the Table, you can enter a new one by choosing *Add* from the button on the *Picklist*.

Next Choose *Contact Type* from the type field. This is how you will sort your contacts in the future. You can add or modify the Contact Type Labels to suit your particular business needs.

Enter the balance of the Contact or Client information. You will notice that the City and Province also have an *F2 Picklist* to help you with your choice and to eliminate as much typing as possible.

You will also notice the name is displayed at the very top of the form. That is so that you will always know which Contact you're working with, no matter what tab you are in.

When you enter a new record, the *Active Field* is ticked on. When a Contact becomes inactive, for whatever reason, you can uncheck this field and still keep the information in the Table for future reference. Then, when you print a contact list, you can choose to print only the Active Contacts.

The bottom area of the form displays vehicle summary information for all vehicles purchased from, sold to or traded by the current contact. This includes all Wholesale or Retail activity. Pressing the "Print Vehicle History" will allow you to view and print the history.

Company :

Name : Howard Mortimer

Address : 4568 Keele Street Toronto ON M9N 1K4

Trans Date		Stock No.	Alpha Stock No	Year	Make	Model	Serial No.	Sale No.
06/08/2013	WB	2004		2005	Chrysler	Sebring	1C3EL56R45N684744	1001
06/08/2013	RS	2003		2010	Ford	Edge	2FMDK4KC8ABA10717	1001

The Status Shown for the Transaction Type are as follows.

Transaction Type Menu Legend		
Legend		Purpose
RB		Sold through Retail Bill of Sale.
TR		Vehicle Taken in as Trade through Retail Bill of Sale.
WB		Vehicle purchased through the Wholesale Buy
WS		Vehicle Sold through the Wholesale Sell.

Miscellaneous Information

Contacts Sam Montague Print This Record ☐ Inactive

Main Information **Miscellaneous Information** **Correspondence**

Drivers Licence: M4565-565656 Licence Expire: 12/13/2009
 Birth Date: 12/13/1962 Insurance Expire: 01/03/2008

Insurance Company: Economical Mutual Policy Number: R54565465R
 Insurance Agent: Client Insurance Agent Name
 Agent's Tel: 416 622-5454

Dealer Number: RIN Number:
 GST Number: PST Number:
 Dealer Salesperson: Salesperson Number:

Notes 1:
 Notes 2:

For a Retail Contact, you will enter the drivers licence and insurance information. If you do not enter this information here, you can choose Edit from the picklist menu in the Retail Bill of Sale to enter it then. It will then be copied back to the Sale form. In the case of Dealer, you must enter the Dealer's information here. It is taken from here when entering vehicles in the Bulk Purchase, Wholesale Buy and Sell forms.

You can also enter any miscellaneous information you wish to make about this record in the notes or memo field.

➤ **Dealer Information**

When you either Buy or Sell a Vehicle to another Dealer, you're required to keep track of certain information. This information should be entered on this tab. In this way, when you fill out the Buy or Sell information, the information will automatically be entered on those forms and you will have a permanent record of the complete transaction.

➤ **Licence and Insurance**

In the case of a Retail Client, you require certain information when filling out a Bill of Sale. When you have previously sold a particular Client a Vehicle, you would already have some of this information. In this case, the information would automatically be filled in when you make out the Bill of Sale form. You can then update the information as required. When you save the Client Information in the Bill of Sale form, the information from this tab automatically gets updated to the most current information.

In the case of a Dealer, filling in the RIN # field will ensure that the correct information is entered in the Wholesale Buy/Sell form when required.

Correspondence

This page tab will allow you to enter email or web information for a Contact.

The screenshot shows the 'Correspondence & Floor Plan' tab selected. It contains the following elements:

- At the top, three tabs: 'Main Information', 'Miscellaneous Information', and 'Correspondence & Floor Plan'.
- Below the tabs, a section with two input fields: 'E-Mail' and 'Web'. To the right of each field is a button: 'Send Email Message' and 'Visit Web Site' respectively.
- Below this is a large text area labeled 'General Notes' with a vertical scrollbar on the right.
- At the bottom, a section titled 'Floor Plan Default Finance Information' containing four fields: 'Days to Amortize' (with a value of 360), 'Finance Rate', 'Per Diem', and a checkbox labeled 'Exclude Tax in Finance Amount?'.

On this Page, you can keep the email or web address for this Contact.

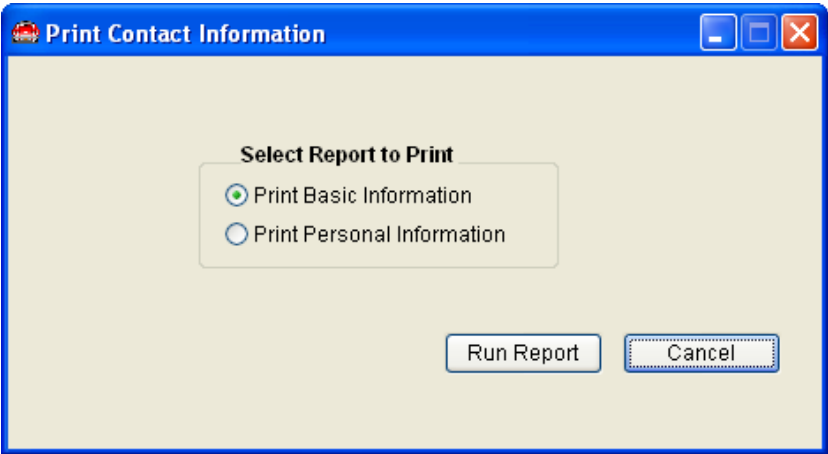
You can also send an email to a particular contact. This process will use your current email client provided you use a MAPI compliant email program. i.e. Outlook or Outlook Express.

This page tab is also where you store the default basic information regarding the Floor Plan for a particular finance institution. Then when you pick the floor plan

company to use in the Vehicle Information screen, the program will copy this information to the form. It can be modified, if required, for a different floor plan.

Print Contact Information

You can print Contact information for the record shown on the screen by clicking the “*Print This Record*” button on the bottom of the form. This will bring up the selection form.

A screenshot of a Windows-style dialog box titled "Print Contact Information". It has a blue title bar with standard minimize, maximize, and close buttons. The main area is light beige. In the center, there's a section titled "Select Report to Print" containing two radio button options: "Print Basic Information" (which is selected) and "Print Personal Information". At the bottom right, there are two buttons: "Run Report" and "Cancel".

Print Contact Information

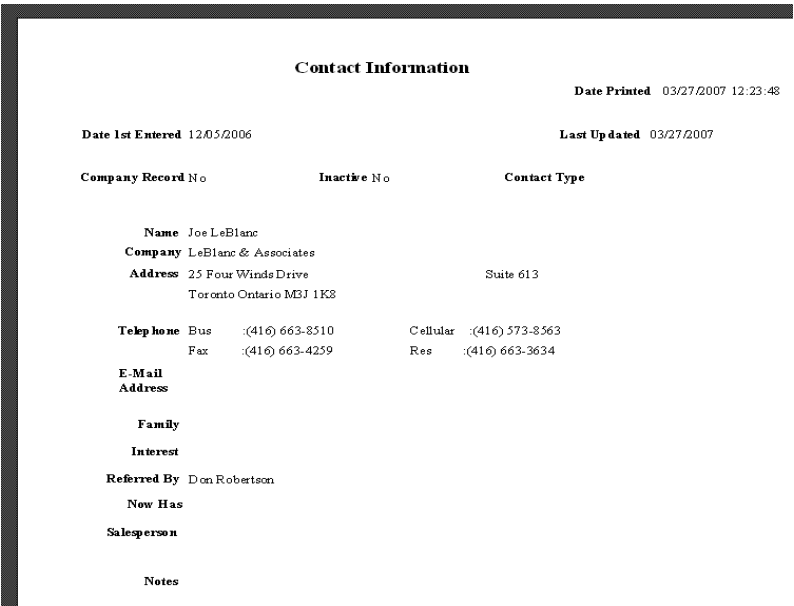
Select Report to Print

☒ Print Basic Information

☐ Print Personal Information

Run Report Cancel

Choose whether to print just the basic information or to print personal information of contact.

A screenshot of a printed report titled "Contact Information". The report contains various fields for a contact named Joe LeBlanc, including company, address, telephone numbers, and email. It also shows dates for when the record was entered and last updated, and a list of family and interests.

Contact Information

Date Printed 03/27/2007 12:23:48

Date 1st Entered 12/05/2006 Last Updated 03/27/2007

Company Record No	Inactive No	Contact Type
Name Joe LeBlanc		
Company LeBlanc & Associates		
Address 25 Four Winds Drive Suite 613 Toronto Ontario M8J 1K8		
Telephone Bus : (416) 663-8510 Cellular : (416) 573-8363		
Fax : (416) 663-4259 Res : (416) 663-3634		
E-Mail		
Address		
Family		
Interest		
Referred By Don Robertson		
Now Has		
Salesperson		
Notes		

Basic Contact Report

Contact Information

Date Printed 03/27/2007 12:35:44

Date 1st Entered 12/05/2006

Last Updated 03/27/2007

Company Record No

Inactive No

Contact Type

Name Joe LeBlanc

Company LeBlanc & Associates

Address 25 Four Winds Drive
Toronto Ontario M3J 1K8

Suite 613

Telephone Bus (416) 663-8510

Cellular (416) 573-8563

Fax (416) 663-4259

Res (416) 663-3634

E-Mail

Address

Drivers Licence L20774101130319

Expires 03/19/2007

Birth Date 03/19/1943

Insurance Company Economical Mutual

Policy Number L3234342234

Expires 10/11/2007

Insurance Agent Ken Gibb

Tel 416 333-3939

Notes

Personal Information Contact Report

Company :

Name : Howard Mortimer

Address : 4568 Keele Street Toronto ON M9N 1K4

Trans Date		Stock No.	Alpha Stock No	Year	Make	Model	Serial No.	Sale No.
06/08/2013	WB	2004		2005	Chrysler	Sebring	1C3EL56R45N684744	1001
06/08/2013	RS	2003		2010	Ford	Edge	2FMDK4KC8ABA10717	1001

Vehicle Info for this Contact

Vehicle Information

From this screen, you will manage your Vehicle Inventory. All Vehicle history as well as current inventory is kept in this Table. This allows for data access and report production for all vehicles that passed through your Dealership.

This Form is broken into 6 tabs, each holding related information.

Vehicle Information

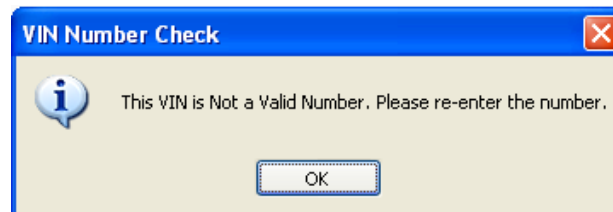
This screen holds the main vehicle information. The program automatically assigns a new Stock Number for all new vehicles added.

Enter the Asking Price in the *Ask Price field*. This information will be used when doing up Bills of Sale. Fill out the *Status field* from the F2 PickList.

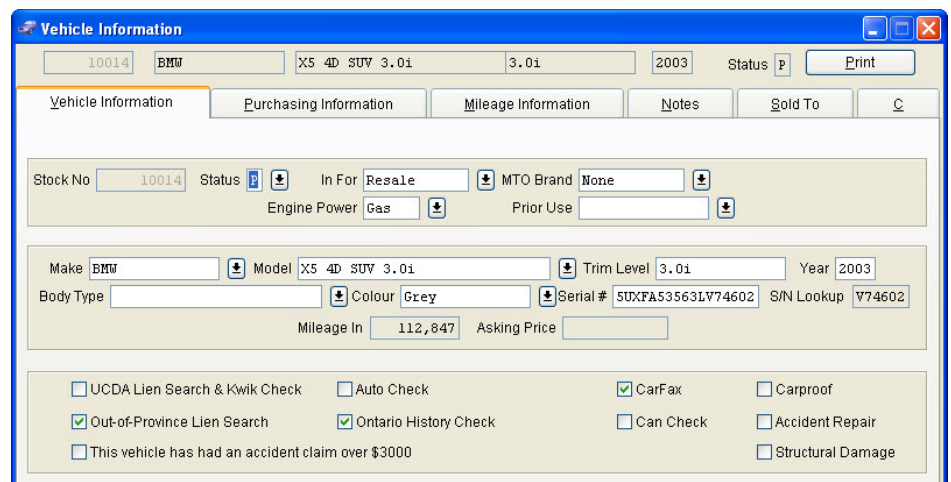
(See Status Information below for description of this field)

Choose items from the Picklist for *Make, Model and Colour fields*

When you enter a Serial/VIN, HomeRun check the VIN to see if the number entered is a valid Serial Number. If the number is incorrectly entered, a message is displayed informing you of this and allowing you to change or re-enter the VIN.



This function also checks that the year entered matches the 10th position validity check. If the year is incorrectly entered, HomeRun will change the year automatically to match the correct year for the VIN.

A screenshot of the "Vehicle Information" software window. The window has a blue title bar and standard Windows window controls. Below the title bar is a tabbed interface with six tabs: "Vehicle Information", "Purchasing Information", "Mileage Information", "Notes", "Sold To", and "C". The "Vehicle Information" tab is active. The form contains several input fields and dropdown menus. At the top, there are fields for Stock No (10014), Make (BMW), Model (X5 4D SUV 3.0i), Trim Level (3.0i), Year (2003), Status (P), and a Print button. Below these are fields for Stock No (10014), Status (P), In For (Resale), MTO Brand (None), Engine Power (Gas), and Prior Use. The main section contains fields for Make (BMW), Model (X5 4D SUV 3.0i), Trim Level (3.0i), Year (2003), Body Type, Colour (Grey), Serial # (SUJFA53563LV74602), S/N Lookup (V74602), Mileage In (112,847), and Asking Price. At the bottom, there are several checkboxes for various checks: UCDA Lien Search & Kwik Check, Auto Check, CarFax (checked), Carproof, Out-of-Province Lien Search (checked), Ontario History Check (checked), Can Check, Accident Repair, This vehicle has had an accident claim over \$3000, and Structural Damage.

Status Field Menu Legend		
Legend	Description	Purpose
A	Available	Means that the particular vehicle is on the lot and available for sale.
P	Purchased	When a vehicle is added to the Inventory through the Wholesale Purchase form it is marked as with a “P”. In this way, you can go in to add the additional information and get the car ready for sale. Once available for sale, the Status field should be changed to “A”
R	Returned	This vehicle was added to Inventory but was returned to the Originating source.
S	Sold	This vehicle was sold Retail.
T	Trade-in	This vehicle was taken as a trade-in.
W	Wholesale	This Vehicle was sold Wholesale to another Dealer

You can add additional items to this list by selecting the Status Item from the support table menu item on the Data -> Lookup Tables -> Status from the main menu.

Purchasing Information

On this tab, you will have information on whom you acquired the Vehicle from. If you acquired this particular Vehicle as a trade-in, the vehicle will be added to the table from the Bill of Sale screen and will be marked with Status of “T”. The purchasing information will automatically be entered on this screen from the Bill of Sale form. If the Vehicle was purchased Wholesale and entered via the Bulk Purchase or Wholesale Buy Form, the information will be filled in automatically from the this form and that particular vehicle will be marked with a status of “P”.

Note: You should go in after receiving vehicles from trade or bulk/wholesale purchase and complete the selling price and change the status as Available.

The screenshot shows the 'Vehicle Information' form with the 'Purchasing Information' tab selected. The form contains the following fields:

- Vehicle Identification: 10014, BMW, X5 4D SUV 3.0i, 3.0i, 2003, Status P, Print button.
- Navigation: Vehicle Information, Purchasing Information (selected), Mileage Information, Notes, Sold To, C.
- Bought From: Express Auto Sales (dropdown), Full Name (text), Address: 8565 Windston Churchill Street, Unit 12, City: Mississauga, Province: Ontario, Postal Code: L4L 4L4.
- Phone: (905) 656-5555, Exten: Work, Phone: (905) 656-8789, Exten: Fax, Phone: () -, Exten: , Other Phone: , Referred By: .
- Purchase Client: (text), Purch Client No: (text).

Note that the Bought From fields are “Read Only” on this form. The purpose of these fields being Read Only is that the information has to be picked from the Contact Table to ensure that the information in this table is always up to date. If the Bought From contact is not in the table, pressing “Add” will bring up the contact form which will allow you to add the contact to the table. If you notice after picking the Contact

that the information is incorrect, press the F2 Picklist icon again and click “Edit” and correct and save the information in the contact form. Note: You may have to pick the contact again after returning to this form to refresh the information.

Mileage

This tab will show the Date the Vehicle was acquired. If the vehicle was purchase through the Wholesale Purchase module, the Date In, Miles and Cost will automatically be entered from the data captured in the Purchase module.

Once the vehicle has been sold (either through the Bill of Sale or Sell Wholesale module) the Date Out, Sold Price, Miles Out and DOT# out will be automatically filled in where appropriate.

Miscellaneous notes about this Vehicle can be entered in the 2 Notes field.

The screenshot shows a software window titled "Vehicle Information". At the top, there are input fields for a vehicle ID (10014), make (BMW), model (X5 4D SUV 3.0i), year (2003), and status (P). A "Print" button is also present. Below this is a tabbed interface with six tabs: "Vehicle Information", "Purchasing Information", "Mileage Information" (which is currently selected), "Notes", "Sold To", and a circular icon. The "Mileage Information" tab contains several input fields: "Date In" (10/02/2003), "Date Out" (/ /), "Mileage In" (112,847), "Mileage Out", "KM/Miles" (KM), and "DOT In" and "DOT Out". At the bottom of this tab is a "Notes" field.

Notes and Comments

In this section you write out the Description that will be used in your Current Vehicle Listing.

The Memo field is a general memo field to put miscellaneous information about this vehicle that doesn't belong elsewhere.

The screenshot shows the 'Vehicle Information' window with the 'Notes' tab selected. The top bar contains fields for VIN (10014), Make (BMW), Model (X5 4D SUV 3.0i), Year (2003), and Status (P). Below the tabs, there are two large text areas labeled 'Description' and 'General Notes', both with vertical scrollbars.

Sold To

This tab is to hold the Sold To information. It is filled in automatically when you update sold information when doing either a Wholesale or Retail Bill of Sale.

The screenshot shows the 'Vehicle Information' window with the 'Sold To' tab selected. The top bar contains fields for Year (2003), Make (Ford), Model (Edge), Trim (Limited AWD), and Status (S). The main area contains a form for customer information: First Name (Howard), Last Name (Mortimer), Company, Address (4568 Keele Street), City (Toronto), Province (ON), and Postal Code (M9N 1K4). A 'Modify Sold to Information' button is at the bottom.

Costs

This tab holds all the pertinent costs and selling prices on this particular vehicle.

The screenshot shows the 'Vehicle Information' window with the 'Costs' tab selected. The top bar contains fields for Year (2002), Make (Nissan), Model (Altima 4D SDN 2.5 S), and Status (A). The main area contains a complex form for financial data. It includes fields for Asking Price (11995.00), Purchase Cost (9254.00), H.S.T. Purchase (1203.02), Sell Price, Expenses, H.S.T. Expense, Net Profit, Total Expenses, and H.S.T. Total (1203.02). There are buttons for 'View/Print Expense Details' and 'Recalculate'. Below this, there are fields for 'Car Paid?' (checkbox), 'Cheque No.', 'Date Paid', 'Floor Plan' (ME Capital Corporation), 'Vehicle Cost' (9254.00), 'Buy Fee' (250.00), 'Taxes' (1235.52), 'Plan Finance Total' (10739.52), 'Interest Rate' (3.90), 'Per Diem %' (0.0001083), '# of Days' (9), and 'Total Cost' (10.47). There are also buttons for 'Recalc Interest' and 'Post Interest Payment to Expenses'.

View Expense Details

At any time, you can view or print expense items that make up the repair or miscellaneous cost by clicking on the “*View/Print Expense Detail*”.

You can print the total expense for this particular vehicle by clicking on the “*Print Expense*” Button

Vehicle Expense Details

Stock No :	2003	Year :	2010	Make :	Ford	Model :	Edge	Colour :	Silver
Serial No :	2FMDK4KC8ABA10	Bought From :	Ford Motor Credit						Purch Stock No :
Inv Date	Company	Inv No	Description	Net Amount	GST	Total			
06/07/2013	Jonathan's Detailing Service	456897	Detailing	100.00	13.00	113.00			
06/07/2013	ABC Vehicle Transport	A87966	Transportation	175.00	22.75	197.75			
Purchase Cost	22250.00	Expenses	275.00	Total Expenses	22525.00	Sold Price	22800.00	Net Profit	275.00

Recalculate Button

Pressing this button will recheck the costs and recalculate the totals on this tab.

Floor Plan

The floor plan detail information is included on this Tab.

Pick the Floor Plan Information from the F2 Pick List for the Floor Plan company. The Finance Rate and other information will be copied to this vehicle from the finance rate and other information entered in the Contact Table.

Once the Finance Total amount is set, check the box to lock the Total Cost Calculation. This can be unchecked in the future if there is a need to reset this information.

Enter Repair Expense

This is where you will enter all expenses other than the acquisition cost. The Vehicle must already have been entered to enter expenses.

The screenshot shows the 'Vehicle Expenses' window with the following fields and values:

- Stock Number: 2003
- Alpha Stock #: (empty)
- Make: Ford
- Model: Edge
- Trim Level: Limited AWD
- Year: 2010
- Colour: Silver
- Serial #: 2FMDK4KC8ABA10717
- Company: ABC Vehicle Transport
- Address: (empty)
- City: (empty)
- Prov: (empty)
- Postal Code: (empty)
- Inv Date: 06/07/2013
- Invoice No: A87966
- Description: Transportation
- NetAmount: 175.00
- H.S.T.: 22.75
- Total Invoice: 197.75
- ☐ H.S.T. Exempt

If you want to view or modify a particular expense for a vehicle, fill in the information on the Find form. To enter a new expense, click Cancel and click the *Add button* on the Button Bar.

Choose the Stock # from the F2 PickList. Once chosen, click *Save* and the *Make, Model and Year fields* will be filled in.

Choose the Company from the Company F2 Picklist Icon. After choosing the company, *click save* to fill in the balance of the company fields. If the Company is not entered in your Records or if some of the information entered is not correct, you can *Add* or *Edit* a company from the F2 Picklist screen.

Continue filling in the Date, Invoice # and enter a short description of the work covered by this invoice. You can use the F2 from the Description field to pick an item.

Enter the Invoice Amount less the GST/HST/HST in the first field. Enter the GST/HST and Total amounts in the appropriate fields.

(You should note that for costing purposes, your invoice amount should include all labour, materials less GST/HST.)

When you save each Vehicle Expense record, the particular vehicle's Expense totals is automatically recalculated and updated.

Tip: If you entered an incorrect amount for a particular expense, simply find that entry and make the correction. When you save that particular expense, the vehicle expense summary on the Vehicle Info Form will be automatically recalculated.

Bill of Sale – Retail

Bill of Sale

The Bill of Sale screen is comprised of 8 tabs each displaying related information. The process is as follows:

1. Fill out the first 7 pages in order. The 8th page displays cost and profit information pertaining to this Bill of Sale.
2. Print the Bill of Sale for the Client to Sign.
3. Place the Bill of Sale in your printer again and Click the “*Print Condition Information*” button to print the Conditions on the back of the Bill of Sale.
4. After the deal has closed, Click the “*Update Car Status Information*” button to update the Car Info Table with the sold to information.
5. After the deal has closed, Click the “*Sold to Information*” button to update the information for this client in the Client Table.
6. If expenses have been added to this vehicle after the Bill of Sale screen is saved, update the information in the Car Info Table by clicking on the “*Update Cost Info After Sale Complete*” button on the *info* tab.

Vehicle

Choose a vehicle from the Stock # F2 PickList. Once chosen, the relevant information from the Car Info Table will be entered in the appropriate fields.

Enter the Sold and Delivery Dates, and current vehicle mileage. Choose KM or Miles from the KM PickList as appropriate. Check the Safety Cert and Emission Certificate checkboxes and enter the Safety Certificate Numbers. (can be entered later but must be filled in before the Bill of Sale is printed or it will have to be manually entered on the Bill of Sale.)

Bill of Sale - Retail - HST

Enter New Bill of Sale Stock No 2003 Make Ford Model Edge

Vehicle Trade Vehicle Sold To Insurance Salesperson Warranty Price Info Print & Update

Sale # 1001 Sold Date 06/08/2013 Delivery Date 06/08/2013 ☐ Completed

Stock No 2003 Alpha Stock # Make Ford Model Edge

Trim Level Limited AWD Colour Silver Body Type

Serial No 2FMDK4KC8ABA10717 Year 2010

Miles Out 24,456 KM/Miles KM MTO Brand Prior Use

☐ Is there a Safety Certificate? Safety #

☐ DISTANCE UNKNOWN (If unknown check one of the following)

☐ Vehicle had travelled As of / /

☐ Actual distance travelled may be substantially higher than odometer reading

Mfr's Warranty In-Service Date / / Details of Delivery

☐ CAMVAP Manufacturer participates in Canadian Motor Vehicle Arbitration Plan

☐ This vehicle has had an accident claim over \$3000 Accident Claim Amount 0.00

☒ Customer Received Carproof Report

Comments

Note : If you wish a comment to print on the Bill of Sale, type whatever you wish printed in the Comment Field.

Trade-in Vehicle

Enter the Trade-in vehicle information on this tab including Owner information if the Owner of the Vehicle is different than the information entered in the “Sold To” Screen

The screenshot shows a software interface with a tabbed menu at the top: Vehicle, Trade Vehicle (selected), Sold To, Insurance, Salesperson, Warranty, Price, Info, and Print & Update. The Trade Vehicle tab is active, displaying a form with the following fields: Trade Stock # (text box), Alpha Stock No (text box), Make (dropdown menu showing Chrysler), Model (dropdown menu showing Sebring), Trim Level (dropdown menu showing Touring), Year (dropdown menu showing 2005), Colour (dropdown menu showing Red), Body Type (dropdown menu showing Passenger Car), Serial # (text box showing 1C3EL56R45N684744), Kilo (text box showing 125,989), KM/Miles (dropdown menu showing KM), and a checkbox labeled "Is there a lien against this vehicle?". A "Delete Trade Vehicle" button is located at the bottom right of the form.

Tip: If after having entered the Trade Vehicle and adding the trade vehicle to inventory the Client decides to not proceed with the Trade, Press the “Delete Trade Vehicle” button and the trade will be deleted from this Bill of Sale and Deleted from your Inventory.

Sold To Information

Choose the Sold To information from the F2 PickList icon next to the *Person field*. If the person is not already in the Contact Information table, click the *Add button* to go the Contact Information entry screen. Fill in all the information on this Client including the Insurance Information. It is recommended that even if the Client is already in the Contact Information table, that you click the Edit Button and confirm with the Client that the Insurance information is entered and correct.

Save the record and exit the Contact Information screen. When you return, the main information will be entered on the “Sold To” screen. Save the record at this time.

All the relevant information on the Client, including the Insurance information will automatically be entered on this form.

If the Purchaser is a Company rather than an Individual, Check the “Sold to Company?” checkbox. This way, the Company name will be printed on the Bill of Sale. Otherwise, the First and Last Name of the Purchaser will be printed.

Vehicle	Trade Vehicle	Sold To	Insurance	Salesperson	Warranty	Price	Info	Print & Update
---------	---------------	---------	-----------	-------------	----------	-------	------	----------------

Last Name	Mortimer	
First Name	Howard	
Company		
Address	4568 Keele Street	
City	Toronto	56E33EFA-C472-4A4F-84F6-090ACDAEDEBE
Prov	ON	Postal Code M9N 1K4

☐ Sold to Company?
Email Address

Tel	(416) 654-9871	Type	Res
Tel	(647) 656-6565	Type	Cellular
Tel	() -	Type	
Tel	() -	Type	

Insurance

The information on this tab should already have been entered from the Client Information table. If not, return to the Sold To tab and rechoose the contact again and enter the information in the insurance tab of the Contact form. Once you save the data and close the Contact form, the information will then be filled in here.

Vehicle	Trade Vehicle	Sold To	Insurance	Salesperson	Warranty	Price	Info	Print & Update
---------	---------------	---------	-----------	-------------	----------	-------	------	----------------

Referred By	
Driver Lic #	M2323-65456-30415
Licence Expire	12/01/2013
Insurance Company	Cooperators General Insurance
Policy #	4568987987
Ins Expiry Date	12/02/2013
Insurance Agent	Ken Willis
Agent Tel	6476569898

Salesperson

Choose the Salesperson Information from the F2 PickList. The Salesperson Registration number will be automatically filled in when you choose the Salesperson.

Then, Choose the *Accepted by* PickList to choose the person responsible for accepting the offer for the Dealership. The person's position and Registration number will automatically be filled in.

Vehicle	Trade Vehicle	Sold To	Insurance	Salesperson	Warranty	Price	Info	Print & Update
Sales Person Sam McGee v Salesperson # 1239996566								
Accepted By Joe LeBlanc v Title Sales Manager Dealer Salesperson # 564546896								

Warranty

There are 2 types of Warranty that a dealer can give, a Dealer Warranty and a 3rd Party Warranty. In both instances, there can be many different warranties that would be applicable for a sale depending on the year and type of vehicle etc... sold.

These Warranties should be entered in the Warranty Table. (*Data ->Lookup Tables->Warranty* menu item to administer these items.)

If there is a Dealer Warranty with this vehicle sale, check the *Dealer Warranty* checkbox and choose the F2 PickList tab next to months to choose a previously entered warranty detail. Modify the description if required to reflect the exact nature of the warranty given.

If there is a 3rd Party Warranty, check the checkbox and choose the previously entered warranty detail from the Company F2 PickList button.

Vehicle	Trade Vehicle	Sold To	Insurance	Salesperson	Warranty	Price	Info	Print & Update
☒ Dealer Warranty? Short Description v Months Mileage Description								
☐ Is there a 3rd party Warranty? Short Description v Months Mileage Company Description Retail Value if Warranty Included in Vehicle Selling Price								
☐ Will the Dealer or Salesperson receive any incentive for financing of this vehicle?								

Price

The Price will be automatically filled in with the Ask Price from the Car Info table when you choose the car in the Vehicle screen. Modify this price if required. Continue filling in the tabs in order.

Provision has been made so that description and price for 3 miscellaneous items can be entered. The short description entered will be printed on the Bill of Sale.

The program automatically performs calculations. After filling in the items on the 1st column, click the Save button to update the calculations.

Continue filling in the information on the right side of the screen. After filling in the Deposit and Paid By fields, click the Save button again to update the calculations.

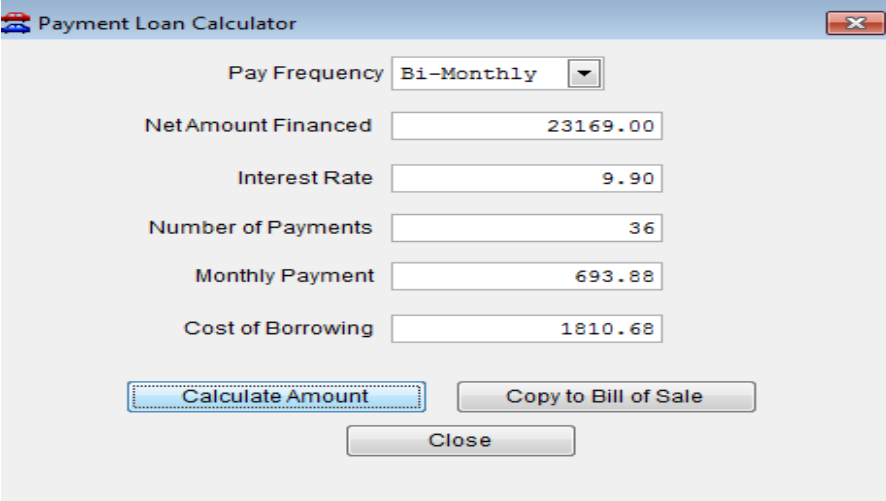
If the vehicle is to be financed, fill in the Financing information.

If you fill in the number of payment Payment Start Date, and the Finance Rate and click the “Calculate Loan Payment” button, it will fill in the Amount of Payment, and the Cost of Borrowing using the Net Amount Financed total.

Vehicle	Trade Vehicle	Sold To	Insurance	Salesperson	Warranty	Price	Info	Print & Update			
Sale Price: 25995.00 Warranty: Admin Fee: 0.00 Misc Item: Misc Charge: 0.00 Misc Item: Misc Charge: 0.00 Misc Item: Misc Charge: 0.00 Misc Item: Misc Charge: 0.00 OMVIC Fee: 5.00 Trade: 3200.00 Net Difference: 22800.00 H.S.T.: 2964.00 ☐ Exempt				Licence Fee: 10.00 Transfer Fee: 10.00 Gasoline: 0.00 Payout Lien on Trade: Balance Due: 25784.00 Deposit: 1000.00 Paid By: Cheque Balance: 24784.00 Balance Financed: 23000.00 Insurance/Disability: Fin. Ins. Type: R.S.T. on Insurance: 0.00 Lien Registration Fee: 169.00 Net Amount Financed: 23169.00 Finance Rate: 9.90 Pay Frequency: Bi-Monthly Cost of Borrowing: 1810.68 Total Balance Due: 1784.00				Amount of Payment: 693.88 No of Payment: 36 Payment Start: 07/06/2013 Loan Calculator			

Click the *Loan Calculator* button to calculate the loan amount details. Ensure that the Pay Frequency, Net Amount Finance, Interest Rate and Number of Payment are correct.

Press the *Calculate Amount* Button. Then Press the *Copy to Bill of Sale* Button and then the *Close* Button. The amounts will be copied back to the Bill of Sale Pricing Tab and the totals recalculated.



Payment Loan Calculator

Pay Frequency: **Bi-Monthly**

Net Amount Financed: **23169.00**

Interest Rate: **9.90**

Number of Payments: **36**

Monthly Payment: **693.88**

Cost of Borrowing: **1810.68**

Calculate Amount **Copy to Bill of Sale** **Close**

After the information on this screen has been completed, Click the print button on tab 9 of the form to print this Vehicle Bill of Sale.

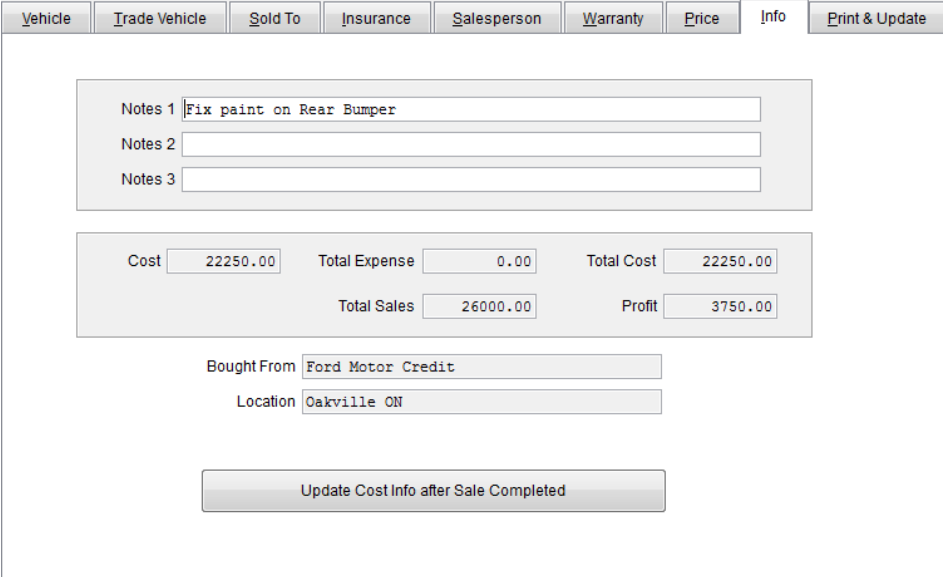
Info & Costs

You can make general notations on this particular sale in the Notes fields.

When you save the information on the price screen, the profit is automatically updated on this screen.

Note: Since Costing and Profit information is on this screen, do not click on this tab if the Client is in a position to see it. This screen is basically designed as a check to ensure that this particular sale is profitable.

Management can check this tab either during the sales process or before the deal is signed to ensure that this particular sale is profitable and what the gross profit amount after expenses is.



Vehicle Trade Vehicle Sold To Insurance Salesperson Warranty Price **Info** Print & Update

Notes 1: **Fix paint on Rear Bumper**

Notes 2:

Notes 3:

Cost	22250.00	Total Expense	0.00	Total Cost	22250.00
		Total Sales	26000.00	Profit	3750.00

Bought From: **Ford Motor Credit**

Location: **Oakville ON**

Update Cost Info after Sale Completed

This graphic shows the last tab with a description of “Notes & Cost”. In the actual program, this tab is blank so that if anyone is looking over your shoulder while you are filling in a Bill of Sale, they will not know this tab exist. If you do not want someone to see the data on this sheet, do not click on the top tab.

Note : In order to be able to have data when printing the Sales Report from the “Report” menu item, you need to Click the Update Cost button.

The data for the report is taken from the Retail Bill of Sale Table.

Print & Update

Click these tabs only after the Bill of Sale is Completed

The top 3 horizontal buttons are to be used after the sale is completed,

- 1 *Add Trade to Stock* – This will add the trade vehicle to your inventory. The program will add the next vehicle stock number to the vehicle. So you can find the vehicle in the data file, the status will be marked as “T” for trade. The program will also update the Vehicle History Table with the trade information.
- 2 *Update Car Status Information* – This will mark the status for the Sold vehicle as sold in the vehicle table.
- 3 *Update Sold To Information* – This will add the information on the purchaser of the vehicle in the Sold vehicle record. The program will also update the sell price for this vehicle and recalculate the profit based on the information in the record. This will also update the Vehicle History Table with the Sold vehicle information.

The following 6 buttons are for the printing of the Retail Bill of Sale as well as other functions that are required for a sale.

1. *Print Bill of Sale(Duplex)* – With more duplex printers in the marketplace, it is now possible to print both front & back pages of a report in 1 pass. If you're printer supports duplex printing, this will make it easier to print.
2. *Print Bill of Sale – Front* – If you do not have duplex printer, you will have to print the front & back of the Bill of Sale individually.
3. *Print Bill of Sale – Back* – After printing the front of the bill of sale, turn the paper around and print the back of the Bill of Sale.
4. *Print receipts for Deposit* - Some Purchasers ask for a separate receipt for their downpayment. At the request of some of our clients, we have included this option in the program.
5. *Print Trade-in Information Form* – The new Ontario regulations require a Purchaser to give the Dealer additional information on the trade vehicle. This form will fill in the Name & Address of the Purchaser as well as the information on the Trade Vehicle as entered in the Retail Bill of Sale. There is a data section on the form that states that this information “Can only be filled in by the Purchaser of the Trade Vehicle” Have your Purchaser fill in and sign the information.
6. *Run Vehicle Appraisal form PDF* – This button opens the Ministry of Finance Appraisal form. You can then fill in the form on screen in a legible manner and print the form. This form cannot be saved. You can also access this same form from the Main Menu.

 HomeRun Software Test Key 1548 Mainway Blvd., Unit 18, Richmond Hill Ontario L3H 3H5 Tel : (905) 555-1112 Fax : (905) 555-4545 COMPANY HIST No. 123456789RT001		123456 Ontario Inc.	
		USED VEHICLE BILL OF SALE Date : 06/08/2013 Sales No : 1001	
PURCHASER Howard Mortimer		ADDRESS 4568 Keele Street	
CITY Toronto		PROV ON	POSTAL CODE M9N 1K4
DRIVERS LICENCE NO M2323-65456-30415		EXPIRY DATE 12/01/2013	HOME PHONE (416) 654-9871 BUS PHONE (647) 656-6565
VEHICLE INFORMATION			
YEAR 2010	MAKE Ford	MODEL Edge	TRIM LEVEL Limited AWD
COLOUR Silver		SERIAL OR VIN # 2FMDK4KC8ABA10717	BODY TYPE
STOCK # 2003			
DISTANCE TRAVELLED 24456 KM		DELIVERY DATE 06/08/2013	
DETAILS OF DELIVERY		CUSTOMER HAS RECEIVED CARPROOF REPORT YES ☒ NO ☐	
☐ DISTANCE UNKNOWN (If unknown check one of the following) ☐ Vehicle had 0 as of / / True distance travelled to be higher ☐ Actual distance travelled may be substantially higher than odometer reading		THIS VEHICLE HAS HAD AN ACCIDENT YES ☐ NO ☒ CLAIM OVER \$ 3000.00 CLAIM AMOUNT MTO BRAND: PRIOR USE: N/A	
INSURANCE INFORMATION			
NAME OF INSURANCE COMPANY Cooperators General		POLICY NO 4568987987	EXPIRY DATE 12/02/2013
NAME OF AGENT Ken Willis		TELEPHONE NO 6476569898	THIS VEHICLE WILL BE DELIVERED WITH A SAFETY STANDARD CERTIFICATE CERTIFICATE NUMBER YES ☐ NO ☒
DEALER WARRANTY		VEHICLE TO BE TRADED-IN	
YEAR 2005	MAKE Chrysler	TRIM LEVEL Touring	IS THERE A DEALER WARRANTY ON THIS VEHICLE? IF YES, COMPLETE THIS SECTION YES ☐ NO ☒ MONTH OR KMS DESCRIPTION
MODEL Sebring	COLOUR Red		
SERIAL OR VIN # 1C3EL56R45N684744			
CERTIFIED DISTANCE THAT VEHICLE HAS TRAVELLED 125989 ☒ KMS ☐ MILES			
IS THERE A LIEN AGAINST THIS VEHICLE? (YES OR NO)		THIRD PARTY WARRANTY	
TERMS OF SETTLEMENT		IS THERE A THIRD-PARTY WARRANTY ON THIS VEHICLE? IF YES, COMPLETE THIS SECTION YES ☐ NO ☒ COMPANY MONTH OR KMS RETAIL VALUE IF INCLUDED IN VEHICLE SELLING PRICE DESCRIPTION	
SELLING PRICE	25,995.00	VEHICLE SOLD AS SEEN, AS DRIVEN, AS EQUIPPED AS DEMOED. VEHICLE SOLD CLEAR AND FREE OF ANY LIENS. MANUFACTURER PARTICIPATES IN CANADIAN MOTOR VEHICLE ARBITRATION PLAN (CAMVAP) YES ☐ NO ☒ CONDITION OF SALE VEHICLE SOLD "AS IS": I agree that if the appropriate space below is initialled by me, the vehicle is sold "As Is" and is not represented as being in a road worthy condition, mechanically sound or maintained at any guaranteed level of quality. The vehicle may not be fit for use as a means of transportation and may require substantial repairs at my expense. It may not be possible to register the vehicle to be driven in its current condition. If this space is not initialled by me, this clause does not form part of this agreement. SALES FINAL. Please review the entire contract, including all attached statements, before signing. This contract is final and binding once you have signed unless the motor vehicle dealer has failed to comply with certain legal obligations.	
THIRD PARTY WARRANTY	0.00		
ADMINISTRATION FEE	0.00		
	0.00		
	0.00		
	0.00		
OMVIC FEE	5.00		
TRADE-IN ALLOWANCE	3,200.00		
NET DIFFERENCE	22,800.00		
H.S.T. ON NET DIFFERENCE	2,964.00		
TERMS OF FINANCING		PAYMENT AMT 693.88 # PAYMENTS 36 PAYMENT START ON 07/06/2013 PAYMENT FREQUENCY IS BI-MONTHLY WILL THE DEALER OR SALESPERSON RECEIVE ANY INCENTIVE FOR THE FINANCING OF THIS VEHICLE? YES ☐ NO ☒ PURCHASER'S INITIALS _____ CREDIT APPROVAL _____	
LICENCE FEE	10.00	SALES PERSON'S ACCEPTANCE SALES PERSON'S NAME Sam McGee SALES PERSON'S REGISTRATION NO 1239996566 SALES PERSON'S SIGNATURE _____ VENDOR'S ACCEPTANCE DEALER'S REGISTRATION NO 4986565 NAME OF OFFICIAL Joe LeBlanc ACCEPTOR'S REGISTRATION NO 564546896 TITLE Sales Manager DATE _____ SIGNATURE _____	
TRANSFER FEE	10.00		
GASOLINE	0.00		
PAYOUT LIEN ON TRADE-IN	0.00		
BALANCE DUE (CERTIFIED FUNDS ONLY)	25,784.00		
DEPOSIT Cheque	1,000.00		
PAYABLE ON DELIVERY	24,784.00		
BALANCE FINANCED SUBJECT TO APPROVAL	23,000.00		
LIFE/DISABILITY INC. (IF REQUESTED)	0.00		
P.S.T. ON INSURANCE	0.00		
LIEN REGISTRATION FEE	169.00	PURCHASER'S SIGNATURE _____ CO-SIGNER'S NAME (PRINT) _____ CO-SIGNER'S SIGNATURE _____	
NET AMOUNT TO BE FINANCED	23,169.00		
COST OF BORROWING 9.90 %	1,810.68		
TOTAL BALANCE DUE	1,784.00		

Retail Bill of Sale – Front Page

IMPORTANT INFORMATION RESPECTING MOTOR VEHICLE SALES

In case of any concern with this sale, you should contact your motor vehicle dealer. If concerns persist, you may contact the Ontario Motor Vehicle Industry Council as administrative authority designed for administering the Motor Vehicle Dealers Act, 2002

You may be eligible for compensation from the Motor Vehicle Dealers Compensation Fund, if you suffer a financial loss from this trade and if your dealer is unable or unwilling to make good on the loss.

You may have additional rights at law. Contact
at 1-800-943-6002 or (416) 226-4500 or at
www.omvic.on.ca



Ontario Motor
Vehicle Industry
Council

SAFETY STANDARDS CERTIFICATE

A safety standards certificate is only an indication that the motor vehicle meets certain basic standards of vehicle safety on the date of inspection.

TERMS AND CONDITIONS

- 1 WARRANTIES - There are no warranties or representations by the dealer with respect to the motor vehicle described herein or affecting the rights of the parties, other than those set out in any applicable legislation and in the case of a new motor vehicle, provided in the new car warranty given by the manufacturer and/or the dealer. No other warranty agreement or representation made hereto, nor any modification hereof, shall be binding upon the dealer or his assigns unless endorsed hereon in writing.
- 2 TITLE - The title and right of property in the said motor vehicle shall not pass to the purchaser until the entire purchase price is paid in full and the purchaser agrees to pay to the dealer upon delivery of the said motor vehicle, in addition to the applicable amounts set out on the reverse hereof, amounts equal to all increases in applicable tax rates, between the date hereof and delivery of the vehicle to the purchaser. In the event that a financing contract cannot be arranged by reason of any default or misrepresentation by the purchase, then the entire purchase price shall forthwith become due and payable.
- 3 DEFAULT IN PAYMENT - In the event that the purchaser shall make default in any payment due hereunder then the entire purchase price shall forthwith become due and payable and subject to the provisions of The Personal Property Security Act and The Consumer Protection Act the dealer or his assigns shall have the right to repossess and resell the motor vehicle by private sale or by public auction, without notice to the purchaser and to that end shall have ther right to make whatever repairs are deemed necessary. Such a repossession and resale shall not affect the dealer's right to retain all payments made theretofore as liquidated damages and not as a penalty.
- 4 CANCELLATION OF AGREEMENT - It is mutually understood and agreed that in the event of this agreement being cancelled by mutual consent, the dealer shall forthwith return the deposit, if any, and any used motor vehicle which has been taken in exchange as part payment of purchase price sold by the dealer prior to such cancellation, shall be accounted for by the dealer at the trade-in allowance as shown on the face of the agreement.
- 5 DELIVERY BY DEALER - It is mutually understood and agreed that where the motor vehicle herein described, is a new motor vehicle, and the dealer is unable to make delivery within three months of the date of the contract, the dealer shall forthwith notify the purchase on expiration of the three month period and,
 - a) The agreement may be extended within 5 days of notification by mutual consent to be evidenced in writing or,
 - b) The 5 day period referred in sub(a) has expired or on express notification of either party, this agreement may be cancelled and the dealer shall forthwith return the deposit if any, and the motor vehicle given as a trade, to the purchaser and such return shall operate as a full release of all claims. Where the motor vehicle given as a trade has been sold by the dealer, the purchaser, on cancellation shall be entitled to recover only the amount set out on the agreement as a trade-in allowance.
- 6 ACCEPTANCE BY PURCHASER - It is mutually understood and agreed that where the purchaser fails to accept delivery of the motor vehicle within seven days of the date of mailing of a notice from the dealer of the availability of the vehicle for delivery, the agreement may be cancelled by the dealer and all moneys paid as a deposit including any motor vehicle taken in exchange may be retained by the dealer as liquidated damages and not as a penalty. The said notice is to be sent by prepaid registered mail addressed to the Purchaser's last known address.
- 7 TRADE-IN VEHICLE - It is mutually understood and agreed that any motor vehicle given in exchange or as part payment towards the purchase price of the motor vehicle sold herein shall be equipped and in the same condition, reasonable wear and tear only excepted, at the time of delivery for acceptance of the said motor vehicle as it was at the date hereon, and any repairs prior to delivery but after the date hereon shall be the sole responsibility of the purchaser.
- 8 LEIN ON PURCHASED VEHICLE - The purchaser shall not hereafter cause or permit any charge, lien or encumbrance whether possessory or otherwise, to exist against the said motor vehicle until the purchase price has been paid in full.
- 9 INSURANCE - It is expressly agreed that the dealer is not responsible and in no way guarantees the provision of insurance coverage of any kind for the said motor vehicle, but may, if so requested, assist the purchaser in obtaining insurance coverage for the said motor vehicle.

CANADIAN MOTOR VEHICLE ARBITRATION PLAN

The Canadian Motor Vehicle Arbitration Plan may be available to resolve disputes concerning alleged manufacturer's defects or implementation of the manufacturer's new motor vehicle warranty.

or

CANADIAN MOTOR VEHICLE ARBITRATION PLAN NOT AVAILABLE

The manufacturer of this vehicle is not a participant in the Canadian Motor Vehicle Arbitration Plan. Therefore, the program under that Plan is not available to resolve disputes concerning alleged manufacturer's defects or implementation of the manufacturer's new motor vehicle warranty.

For further information on which manufacturers participate in this program, visit www.camvap.ca

Retail Bill of Sale – Back Page

Joe LeBlanc
45698 Mainway Street, Unit 12, Mississauga Ontario L4L 3L3
Tel : (905) 555-4111 Fax : (905) 555-4222
COMPANY GST No. 83722 3213

CUSTOMER VEHICLE TRADE-IN INFORMATION FORM

Registered Owner Harold Mortimer
of Vehicle - Name 456 Wentworth Road Apt 403
and Address Hamilton Ontario L4L L4L
Phone Numbers Res (905) 545-5454
Bus (905) 454-8787

Trade Vehicle
Year 1998 Model Dodge Model Stratus 2.0L 4D Trim Level 456456
Colour Beige Body Type Passenger Car Serial #/VIN 1B3EJ46X2WN333134

INFORMATION BELOW MUST BE FILLED IN BY TRADE VEHICLE OWNER

MANDATORY DISCLOSURE STATEMENT AS REQUIRED BY MVDA, 2002

MTO REGISTRATION BRAND Irreparable ☐ Rebuilt ☐ Salvage ☐ None ☐

ODOMETER READING

DISTANCE TRAVELLED

IS ODOMETER FAULTY, BROKEN, REPLACED OR ROLLED BACK

☐ YES

IF YES, SEE SECTION 1 BELOW AND CHECK APPROPRIATE BOX HERE

1A ☐

1B ☐

IF 1A IS CHECKED, SHOW PREVIOUS ODOMETER READING
AND DATE OF PREVIOUS READING

DISTANCE TRAVELLED - See distance travelled box above

(a) The Purchaser cannot determine the total distance that the vehicle has been driven but can determine the distance that the vehicle has been driven as of some past date. The total distance driven is believed to be higher than the previously recorded distance.

or

(b) The Purchaser can determine neither the total distance that the vehicle has been driven, nor the distance that the vehicle has been driven as of some past date. The total distance that this vehicle has been driven is unknown and may be substantially higher than the reading shown on the odometer.

WAS THIS VEHICLE ANY OF THE FOLLOWING

DAILY RENTAL ☐ FIRE DAMAGED ☐ WATER DAMAGED ☐ POLICE CRUISER ☐ EMERG.SERVICE VEHICLE ☐ TAXI/LIMO ☐

DOES THE VEHICLE REQUIRE REPAIRS TO SUSPENSION/SUBFRAME

YES ☐

IF YES TO ANY ITEMS TO THE LEFT, GIVE DETAILS:

DOES THE VEHICLE HAVE STRUCTURAL PARTS DAMAGED, ALTERED OR REPAIRED

YES ☐

HAVE THERE BEEN ANY PREVIOUS DAMAGE REPAIRED EXCEEDING \$ 3000.00

YES ☐

HAVE THE MANUFACTURER'S BADGES OR DECALS BEEN CHANGED OR HAVE
THE ORIGINAL PRODUCTION SPECIFICATIONS BEEN CHANGED

YES ☐

ARE THERE OTHER DISCLOSURES:

WITHIN THE LAST SEVEN YEARS WAS THIS AN:

OUT-OF-PROVINCE VEHICLE ☐ YES

U.S. VEHICLE ☐ YES

IF YES IDENTIFY PROVINCE(S) OR STATE(S):

ANTI-LOCK BRAKES/INOPERABLE

YES ☐

NOT APPLICABLE ☐

AIR BAGS MISSING/INOPERABLE

YES ☐

NOT APPLICABLE ☐

POLLUTION CONTROL INOPERABLE

YES ☐

NOT APPLICABLE ☐

HAS VEHICLE EVER BEEN DECLARED

A TOTAL LOSS BY AN INSURER

YES ☐

THEFT RECOVERY

YES ☐

ANY BODY PANELS PAINTED OR REPLACED

YES ☐

MANUFACTURER'S WARRANTY CANCELLED

YES ☐

Name : _____
Please Print

Signature : _____

Date : _____

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Trade-In Information Form

Purchase Bulk Vehicles

Purchase Bulk Vehicles

Whether you buy your vehicles individually or in bulk, this section will allow you to enter the car information and print a list of the vehicles purchased.

For entering new purchases, the steps are as follows,

1. Choose the Vendor from the F2 PickList next to Vendor Name.
2. Verify the Vendor Licence and other information from the Number Tab.
3. Enter the Purchasing Salesperson information.
4. Enter the vehicles in the Cars Purchased grid. Note that you do not assign the Stock number at this time.
5. Click the *Update Car Stock* button on the top right corner of the screen.
6. Print the List.

The screenshot shows the 'Purchase Bulk Vehicle' window. At the top, there are fields for Sub Total (43150.00), GST (2589.00), and Grand Total (45739.00). A button labeled 'Update Car Stock' is next to a text field containing '74680BC6-6'. Below this, the 'Vendor Name & Address' tab is active, showing fields for Agreement No (20004), Buy Date (01/31/2007), Vendor Name (Expressive Auto Wholesalers), Address (4565 Wharton Road, Suite 203), City (Brampton), Province (Ontario), and Postal Code (L3L 3L3). A 'Print Listing' button is also visible. Below the vendor information is a table titled 'Vehicles' with columns: Stock_no, Year, Make, Model, Colour, Mileage, Serial, P/T, and Price. The table contains six rows of vehicle data.

Stock_no	Year	Make	Model	Colour	Mileage	Serial	P/T	Price
10107	2001	Chevrolet	Silverado 2500 EXT CA	COPPER	167858	2GCEK19T71113153		12300.00
10108	1999	Ford	F150 SUPER CAB XL 4WD	Blue	104171	2FTRX18W4XCA9601		10700.00
10109	1995	Chevrolet	Cavalier 2.2L 4D SDN	Red	270596	3G1JC5244S80101		1200.00
10110	1999	Ford	Escort 2.0L 4D SDN SE	Black	191185	1FAFPA3P1XW12123		2000.00
10111	2002	Chrysler	Sebring 2.7 L Sedan	White	063467	1C3EL46R62N22284		8150.00
10112	2002	Ford	Focus 4D WGN SE	Red	80443	1FAFP36382W34738		8800.00

Check the information is correct. If there is no information shown, go back to Vendor Address tab and choose the Vendor PickList Icon and click the Edit button. This will put you in the Contact Form. Ensure that the information is entered correctly for this Vendor. Save and Close the Client Form and return to the Agreement. Save the information again. The information will be transferred to this form.

Choose Purchaser Salesperson from the Purchaser Salesperson PickList Icon.

The screenshot shows the 'Purchase Bulk Vehicle' window with the 'Numbers' tab active. It displays fields for Vendor RIN # (789789), Vendor GST # (123565487RT001), Vendor PST #, Vendor Salesman (Willie Wonka), and Vendor Salesman # (878987). Below these, there are fields for Purchaser Salesman (John Smith) and Purchaser Salesman # (12565465).

Enter the information on the Cars Purchased. You can put in as many vehicles in the grid as you wish.

Fill in the Vend Stock #, and Year. When the cursor is in the Make field, Press F2 to choose a vehicle make from a list. Do the same for the Model field.

Fill in the Serial #, Mileage and Price Paid fields. Also if the vehicle is either a Police Car or Taxi, check the P/T Checkbox.

Note that the Serial Number is checked for validity when you move off the Field. If the Serial Number is entered incorrectly, you will be prompted to reenter it correctly. Also, the year is extracted from the Serial Number and put in the Year field for that particular vehicle.



The entering of an incorrect VIN will not stop you from continuing entering information. This feature is intended only to alert you of an incorrect VIN.

A running total at the top of the screen will update after you save each vehicle.

Vehicles								
Stock_no	Year	Make	Model	Colour	Mileage	Serial	P/T	Price
10107	2001	Chevrolet	Silverado 2500 EXT CA	COPPER	167858	2GCEK19T71113153	☐	12300.00
10108	1999	Ford	F150 SUPER CAB XL 4WD	Blue	104171	2FTRX18W4XCA9601	☐	10700.00
10109	1995	Chevrolet	Cavalier 2.2L 4D SDN	Red	270596	3G1JC5244S80101	☐	1200.00
10110	1999	Ford	Escort 2.0L 4D SDN SE	Black	191185	1FAFP3P1XW12125	☐	2000.00
10111	2002	Chrysler	Sebring 2.7 L Sedan	White	063467	1C3EL46R62W22284	☐	8150.00
10112	2002	Ford	Focus 4D WGN SE	Red	80443	1FAFP36382W34736	☐	8800.00

Update Car Stock

Once you finish filling and saving the Vehicle information, click the *Update Car Stock* button. This will assign a Stock Number to each vehicle and add them to the Vehicle Info Table with a Status of “P” for Purchased. It will also update who the Vehicles were purchased from.

You can then go into the Vehicle Info screen and update Asking price information. When the vehicle is ready for sale, change the Status to “A”.

Click the Print Icon to view and print the Wholesale Purchase Agreement.

Purchaser Your Company Name Here 123 Anystreet Unit 12 Anytown Ontario L3L 5L3				Purchaser Salesman John Smith Purchaser Salesman No. 12565465 Purchase Date 01/31/2007 Agreement No. 20004				
Vendor Expressive Auto Wholesalers 4565 Wharton Road Suite 203 Brampton Ontario L3L 3L3				Vendor Salesman Willie Wonka Vendor Salesman No. 878987 Vendor GST No. 123565487RT001 Vendor PST No.				
Stock No.	Year	Make	Model	Colour	Serial No.	Mileage	P/T	Price
10107	2001	Chevrolet	Silverado 2500 EXT CAB	COPPER	2GCEK19T711131533	167858	NO	12,300.00
10108	1999	Ford	F150 SUPER CAB XL 4WD	Blue	2FTRX18W4XCA96011	104171	NO	10,700.00
10109	1995	Chevrolet	Cavalier 2.2L 4D SDN	Red	3G1JC5244SS801012	270596	NO	1,200.00
10110	1999	Ford	Escort 2.0L 4D SDN SE	Black	1FAFPA3P1XW121296	191185	NO	2,000.00
10111	2002	Chrysler	Sebring 2.7 L Sedan	White	1C3EL46R62N222840	063467	NO	8,150.00
10112	2002	Ford	Focus 4D WGN SE	Red	1FAFP36382W347381	80443	NO	8,800.00
							Sub Total	43,150.00
							G.S.T.	2,589.00
							Total	45,739.00

Wholesale Buy/Sell Agreements

Wholesale Buy Agreement

The new MVDA Regulations has specific requirements on Dealers when Buying and Selling used vehicles.

HomeRun XL 3.5 has been designed to allow Dealers to enter vehicles while capturing the required information and printing compliant Bills of Sale.

In the greatest majority of the cases, vehicles are purchased one at a time. Because of the information that has to be entered for each vehicle, the agreement has been designed to be entered one vehicle at a time.

The steps for filling in the Wholesale Buy Agreement are as follows. Note that the form has 2 tabs. The first tab contains the purchaser and vendor information as well as the basic vehicle information. The second tab has the Vehicle disclosure information.

NOTE: There are times when a Dealer purchases a vehicle from an private individual. When this is the case, if the Company Name in the Contact table is empty, the program will enter the First and Last Name of the Contact record in the “Seller Name” field. Otherwise, the Company Name will be entered. In the case where the Seller not a HST Registrant, Check the box “HST/GST Exempt” and the tax will not be calculated.

1. Choose the Vendor from the F2 PickList button next to the Vendor Name.
2. Verify the Vendor licence and other information from the Number tab.
3. Enter the Purchasing Salesperson information.
4. Notice that the Purchaser Name and other information is automatically filled in when you enter a new record.
5. Enter the name and licence number of the person that will be signing the document for this vehicle purchase.
6. Enter the information for the vehicle purchased on the bottom part of the form. Note that you do not assign the Stock Number at this time. A stock number will be assigned for this vehicle when you press the Add Vehicle to car stock button.
7. Click the “Check & Disclosure Statement” tab and fill the information.
8. Click on the Update Car Stock button at the top right corner of the form.
9. Print the Wholesale Buy Agreement.

Buy Wholesale Bill of Sale

Agreement # 3204 Agreement Date 06/08/2013 ☒ Buy Agreement

SELLER

MVDAReg # 54897654897
Seller Name Ford Motor Credit
Address The Canadian Road
City Oakville
Province ON
Postal Code L6J 5C7
Tel # () - Fax # () -
Salesperson's Registration # 3587455
Salesperson's Name Samuel Fordham
GST Registration # 5465464564RT001

PURCHASER

MVDAReg # 4986565
Purchaser Name 123456 Ontario Inc. O/A HomeRun Software
Address 1548 Mainway Blvd
Unit 18
City Richmond Hill
Province Ontario
Postal Code L3H 3H5
Tel # (905) 555-1112 Fax # (905) 555-4545
Salesperson's Reg # 564546896
Salesperson's Name Joe LeBlanc
GST Registration # 123456789RT001
PST Registration # 1234-8965

Stock # Alpha Stock # Year Make Model Trim Level
Colour Gas/Diesel/Hybrid Serial # Distance Travel KM/Miles
Price H.S.T. ☐ HST/GST Exempt Licence Fee Total Price

Check that the information is correct. If there is no information shown, go back to Vendor name field and choose the Vendor PickList Icon and click the Edit button. This will put you in the Contact Form. Ensure that the information is entered correctly for this Vendor. Save and Close the Client Form and return to the Agreement. Save the information again. The information will be transferred to this form.

Enter the information on the Vehicle purchased..

You can leave the Year field blank. Once the VIN is validated, the program will extract the Year from the VIN.

When the cursor is in the Make field, Press F2 to choose a vehicle make from a list. Do the same for the Model field.

Fill in the Serial #, Mileage and Price Paid fields. Also if the vehicle is either a Police Car or Taxi, check the P/T Checkbox.

Note that the Serial Number is checked for validity when you move off the Field. If the Serial Number is entered incorrectly, you will be prompted to reenter it correctly. Also, the year is extracted from the Serial Number and put in the Year field for that particular vehicle.



The entering of an incorrect VIN will not stop you from continuing entering information. This feature is intended only to alert you of an incorrect VIN.

Fill in the information on this form that pertain to this vehicle.

WHOLESALE BILL OF SALE					
Express Auto Sales 8565 Windston Churchill Street Suite Mississauga Ontario L4L 4L4 MVDA Registration # 87564879879 G.S.T. Registration # 123456789RT001 Tel # (905) 656-5555 Fax # (905) 656-8789 herein after called the "Seller"			Test Auto Sales 234 Main Street Unit 12 Mississauga Ontario L3H 3K9 MVDA Registration # 98989898 P.S.T. Registration # 1111-2222 Tel # (905) 659-8656 Fax # (905) 656-3656 herein after called to "Buyer"		
Stock #	Year	Make	Model	Trim Level	
10014	2003	BMW	X5 4D SUV 3.0i	3.0i	
Colour	Gas/Diesel/Hybrid	Serial #	Distance Travelled	Km/Miles	
Grey	Gas	5UXFA53563LV74602	112,847	KM	
Price		GST	Licencing	Total	
13,525.00		676.25	0.00	14,201.25	
SEARCH PROVIDED					
☐ UCDA Lien Search & Kwik Check™			☐ Auto Check™		
☒ Out-of-Province Search™			☒ CarFax™		
☒ Ontario History Search™			☒ CanCheck™		
MANDATORY DISCLOSURE STATEMENT AS REQUIRED BY MVDA 2002					
MTO REGISTRATION BRAND None					
DISTANCE TRAVELLED IS ODOMETER FAULTY, BROKEN, REPLACED OR ROLLED BACK ☐ YES ☐ NO IF YES, SEE SECTION 1 BELOW AND CHECK APPROPRIATE BOX HERE ☐ 1A ☐ 1B IF 1A IS CHECKED, SHOW PREVIOUS ODOMETER READING _____ AND DATE OF PREVIOUS READING ____/____/____					
DAILY RENTAL ☐ FIRE DAMAGED ☐ WATER DAMAGED ☐ POLICE CRUISER ☐ EMERG.SERVICE VEHICLE ☐ TAXI/LIMO ☐					
DOES THE VEHICLE REQUIRE REPAIRS TO SUSPENSION/SUBFRAME YES ☐ NO ☐ DOES THE VEHICLE HAVE STRUCTURAL PARTS DAMAGED, ALTERED OR REPAIRED ☐ HAVE THERE BEEN ANY PREVIOUS DAMAGE REPAIRED EXCEEDING \$ 3000.00YES ☐ NO ☐ HAVE THE MANUFACTURER'S BADGES OR DECALS BEEN CHANGED OR HAVE THE ORIGINAL PRODUCTION SPECIFICATIONS BEEN CHANGED YES ☐ NO ☐ ARE THERE OTHER DISCLOSURES: _____ IF YES TO ANY OF THE ABOVE, GIVE DETAILS: _____					
WITHIN THE LAST SEVEN YEARS WAS THIS AN: OUT-OF-PROVINCE VEHICLE ☐ YES ☐ NO U.S. VEHICLE ☐ YES ☐ NO IF YES IDENTIFY PROVINCE(S) OR STATE(S): _____					
ANTI-LOCK BRAKES/INOPERABLE YES ☐ NO ☐ AIR BAGS MISSING/INOPERABLE YES ☐ NO ☐ POLLUTION CONTROL INOPERABLE YES ☐ NO ☐ HAS VEHICLE EVER BEEN DECLARED A TOTAL LOSS BY AN INSURER YES ☐ NO ☐ THEFT RECOVERY YES ☐ NO ☐ ANY BODY PANELS PAINTED OR REPLACED YES ☐ NO ☐ MANUFACTURER'S WARRANTY CANCELLED YES ☐ NO ☐					
TERMS					
1 - DISTANCE TRAVELLED - See distance travelled box above (a) The dealer cannot determine the total distance that the vehicle has been driven but can determine the distance that the vehicle has been driven as of some past date. The total distance driven is believed to be higher than the previously recorded distance. (b) The dealer can determine neither the total distance that the vehicle has been driven, nor the distance that the vehicle has been driven as of some past date. The total distance that this vehicle has been driven is unknown and may be substantially higher than the reading shown on the odometer. 2 - Legal ownership of the vehicle(s) shall pass to the Purchaser upon payment of the Total Sale Price to the Seller. 3 - All risks of damage to the vehicle(s) is the responsibility of the Purchaser once delivery has been taken by the Purchaser. 4 - The above shall comprise the entire agreement affecting this purchase and no other agreement, understanding, representation, condition or warranty either express or implied by law or otherwise is a part of this transaction, any such agreement, understanding, representation, condition or warranty being hereby expressly excluded.					
I/WE HAVE READ AND UNDERSTAND THE TERMS OF THIS BILL OF SALE					
ACCEPTED BY SELLER Salesperson's Name <u>James Elliott</u> Salesperson's Registration # <u>45678945</u> Signature _____			ACCEPTED BY PURCHASER: Salesperson's Name <u>John Smithers</u> Salesperson's Registration # <u>123456789</u> Signature _____		

Wholesale Sell Agreement

You will use this section to sell Vehicles to other Dealers or Wholesalers.

In the greatest majority of the cases, vehicles are purchased one at a time. Because of the information that has to be entered for each vehicle the agreement has been designed to enter only one vehicle at a time.

The steps for filling in the Wholesale Buy Agreement are as follows. Note that the form has 2 tabs. The first tab contains the purchaser and vendor information as well as the basic vehicle information for the Vehicle Sofd. The second tab has the Vehicle disclosure information.

You will notice that the information on you the Seller is automatically filled in on a new sale. Enter the Salesperson and their MVDA registration number.

Choose the Vendor from the F2 PickList next to Vendor Name.

Verify the Vendor Licence and other information from the Number Tab.

Enter the Purchasing Salesperson information.

Choose the Vehicle by picking it from your Vehicle Inventory.

Click the *Update Car Stock* button on the top right corner of the screen.
Print the Wholesale Buy Agreement

After filling in the Purchaser information, choose the Vehicle for Sale by pressing F2 picklist icon next to the Stock No field.

This will fill in the information automatically provided all the information was entered in the Vehicle Screen. The Price will be filled in from the Asking Price entered in the Vehicle Info table. You should change the price to the price agreed with the Purchaser of the vehicle. The mileage will also be filled in from the Vehicle Info table. Change the mileage to the current mileage. This information will be marked in the Mileage Out field when the update is performed.

The next step is to fill in the Vehicle Disclosure information. If any of this information is entered in the Vehicle Info table, it will be automatically transferred to this form when the vehicle is chosen.

Save the record by Clicking on the Save Icon on the top button bar.



Click the "Print Agreement" button to view and print the Agreement.

WHOLESALE BILL OF SALE					
Sentinel Auto Sales Inc. 12345 Mainway Ave Unit 12 Mississauga Ontario L4L 4L4 MVDA Registration # S.S.T. Registration # 54565465 Tel # (905) 555-4111 Fax # (905) 555-4222 herein after called the "Seller"			Georgetown Auto Sales 2545 Mountain Road South Georgetown Ontario L7G4J7 MVDA Registration # 5254545 P.S.T. Registration # 9876-5432 Tel # (905) 656-5656 Fax # (905) 656-5555 herein after called to "Buyer"		
Stock #	Year	Make	Model	Trim Level	
10127	1998	Honda	CR-V 4D Auto 4WD	1X	
COLOUR	Gas/Diesel/Hybrid	Serial #	Distance Travelled	Km/Miles	
Green	Gas	JH1RD1844WC805759	139,257	KM	
Price	7,995.00	GST	399.75	Licensing	5.00
Total		8,399.75			
SEARCH PROVIDED					
☒ UCDA Lien Search & Writ Check™ ☐ Auto Check™ ☐ CarFax™					
☒ Out-of-Province Search™ ☐ Ontario History Search™ ☐ CanCheck™					
MANDATORY DISCLOSURE STATEMENT AS REQUIRED BY MVDA 2002					
MTO REGISTRATION BRAND None					
DISTANCE TRAVELLED					
IF ODOMETER ERROR, INCREASE, REPLACED OR SOLID BACK					
IF YES, SEE SECTION 1 BELOW AND CHECK APPROPRIATE BOX HERE: ☐ 1A ☐ 1B					
IF 1A IS CHECKED, GIVE PREVIOUS ODOMETER READING					
AND DATE OF PREVIOUS READING / /					
DAILY RENTAL ☐ FIRE DAMAGED ☐ WATER DAMAGED ☐					
POLICE CRUISER ☐ EMERG.SERVICE VEHICLE ☐ TAXI/LIMO ☐					
DOES THE VEHICLE REQUIRE REPAIRS TO SUSPENSION/SWITCHGEAR YES ☐					
DOES THE VEHICLE HAVE STRUCTURAL PARTS DAMAGED, ALTERED OR REPAIRED ☐					
HAVE THERE BEEN ANY PREVIOUS DAMAGE REPAIRS EXCEEDING \$ 3000.00YES ☐					
HAVE THE MANUFACTURER'S BADGES OR DECALS BEEN DAMAGED OR SAVED YES ☐					
THE ORIGINAL PRODUCTION SPECIFICATIONS WERE CHANGED					
ARE THERE OTHER DISCLOSURES:					
IF YES TO ANY OF THE ABOVE, GIVE DETAILS:					
WITHIN THE LAST SEVEN YEARS WAS THIS AN:					
OUT-OF-PROVINCE VEHICLE ☐ YES					
U.S. VEHICLE ☐ YES					
IF YES IDENTIFY PROVINCE(US) OR STATE(S):					
ANTI-LOCK BRAKES/INOPERABLE YES ☐					
AIR BAGS MISSING/INOPERABLE YES ☐					
COLLISION CONTROL INOPERABLE YES ☐					
HAS VEHICLE EVER BEEN DECLARED					
A TOTAL LOSS BY AN INSURER YES ☐					
THEFT RECOVERY YES ☐					
AND BODY PANELS PAINTED OR REPLACED YES ☐					
MANUFACTURER'S WARRANTY CANCELLED YES ☐					
TERMS					
1. DISTANCE TRAVELLED - See distance travelled box above					
(a) The dealer cannot determine the total distance that the vehicle has been driven but can determine the distance that the vehicle has been driven as of some past date. The total distance driven is believed to be higher than the previously recorded distance					
or					
(b) The dealer can determine whether the total distance that the vehicle has been driven, over the distance that the vehicle has been driven as of some past date. The total distance that this vehicle has been driven is unknown and may be substantially higher than the reading shown on the odometer					
2 - Legal ownership of the vehicle(s) shall pass to the Purchaser upon payment of the Total Sale Price to the Seller.					
3 - All risks of damage to the vehicle(s) is the responsibility of the Purchaser once delivery has been taken by the Purchaser.					
4 - The above shall comprise the entire agreement affecting this purchase and no other agreement, understanding, representation, conditions or warranty either express or implied by law or otherwise is a part of this transaction, any such agreement, understanding, representation, conditions or warranty being hereby expressly excluded.					
I/WE HAVE READ AND UNDERSTAND THE TERMS OF THIS BILL OF SALE					
ACCEPTED BY SELLER			ACCEPTED BY PURCHASER:		
Salesperson's Name John Wingold			Salesperson's Name Sam Whitehorse		
Salesperson's Registration # 123456789			Salesperson's Registration # 5464654654		
Signature			Signature		
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Employees

You will use this section to enter employee information. The main purpose is to have the employee names, job title and licence number so that it can be inserted in documents where required. Another use is to record telephone information so that your staff has ready access to telephone numbers when they need them.

This form layout comprises of 4 tabs.

The steps for the Employee Screen are as follows:

The First Tab is *Name & Licence #*. On this tab, enter the Employee's First and Last Name, Use the Pick List to choose the Employee Title. Enter the Person's licence number. The Driver's Licence Number is optional and is strickly for your records.

Note: In the case of a Management Employee, ensure that you fill in the Title field. This Title will be entered on the Bill of Sale form for the accepting officer.

The screenshot shows the 'Employee Information' window with the 'Name & Licence #' tab selected. The window title is 'Employee Information' and the employee name 'Wesley Spike' is displayed at the top. The tab bar has four tabs: 'Name & Licence #', 'Address', 'Telephone', and 'Notes'. The main form area contains the following fields: 'First Name' with the value 'Wesley', 'Last Name' with the value 'Spike', 'Title' with a dropdown menu showing 'Sales Representative', 'Licence No' with the value '45689865655', and 'Driver Licence No' which is an empty field.

The Second tab, enter the *Address* of the employee. If this Employee is an independent Employee that invoices you for commissions and other services, enter the name of the company the Employee uses to invoice you.

The screenshot shows the 'Employee Information' window with the 'Address' tab selected. The window title is 'Employee Information' and the employee name 'Wesley Spike' is displayed at the top. The tab bar has four tabs: 'Name & Licence #', 'Address', 'Telephone', and 'Notes'. The main form area contains the following fields: 'Company Name' with the placeholder text 'Enter Company Name if applicable', 'Address' with two empty text boxes, 'City' with an empty text box and a dropdown arrow, 'Province' with an empty text box and a dropdown arrow, and 'Postal Code' with an empty text box.

Fill out the *Telephone Numbers and Extentions*.

The 'Employee Information' window for Wesley Spike has four tabs: 'Name & Licence#', 'Address', 'Telephone', and 'Notes'. The 'Telephone' tab is active. It contains three rows of telephone information, each with a 'Telephone' field and an 'Extention' dropdown menu. The first row shows '(416) 656-5656' and 'Cellular'. The second row shows '(905) 785-9898' and 'Res'. The third row shows '() -' and an empty dropdown. There is also an 'Other Tel' field at the bottom.

Telephone	Extention
(416) 656-5656	Cellular
(905) 785-9898	Res
() -	

Other Tel

Fill out the *Notes Tab*

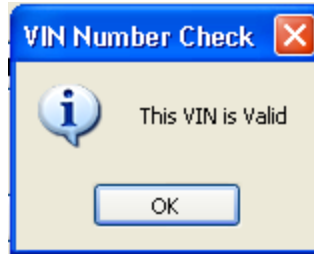
Vin Checker

The Vin Checker allows you to check the validity of a VIN without having to open up a Vehicle Information form.

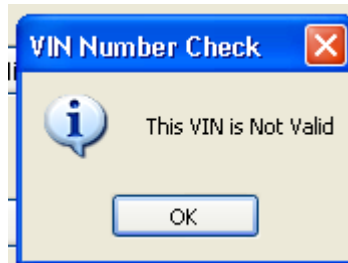
Simply enter the VIN in the Validate field and click "Verify VIN". If the VIN is valid, you will be given a message indicating this. The model year will be extrapolated from the VIN and entered in the Model Year field.

The 'Vin Checker' window has a blue title bar. It contains two input fields: 'Enter VIN to Validate' and 'Model Year'. Below these are three buttons: 'Verify VIN', 'Copy VIN to Clipboard', and 'OK'.

Enter VIN to Validate Model Year



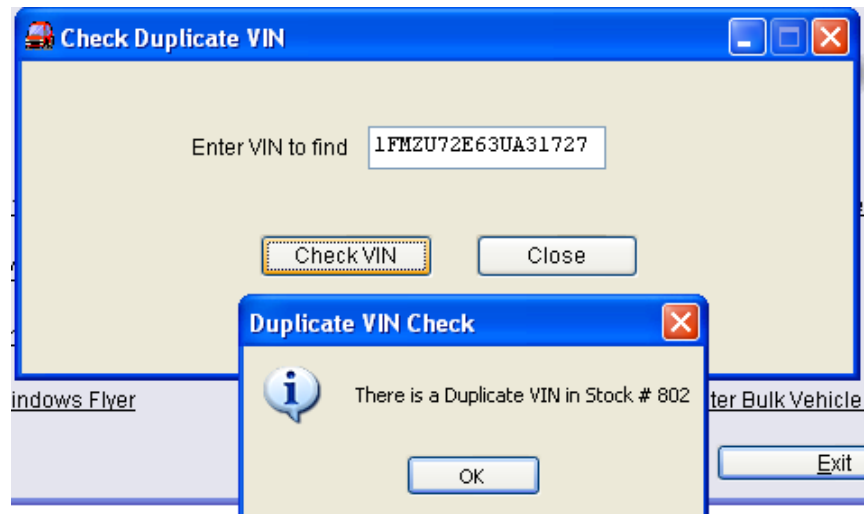
If the VIN is incorrect, the message will indicate this.



If you want to copy the VIN to another Windows program, simply click the Copy button and the VIN as entered will be copied to the Windows Clipboard. You can then simply paste it in your other document etc...

Check Duplicate VIN

Let's say that you sold a vehicle to a Client. The Client was so happy with his purchase and the service received that he returns to buy or trade for another vehicle. You want to check the information on what will now be his trade vehicle. Simply enter the VIN in this form and program will give you the original stock number of this vehicle.



Administrative Tools

Overview

This chapter describes the HomeRun XL 3.5 administrative tools that aren't described elsewhere in this User's Guide. This includes:

- **Error Handling:** See "Errors" on page 83.
- **Reindex / Pack Tables Utility:** See Reindex / Pack Tables Utility.

Admin Tools

Errors

Regardless of how extensively a developer tests software, errors occur. Consequently, HomeRun XL 3.5 contains an error-handler that deals with errors gracefully and records useful information about the errors.

Important: Don't be alarmed. We do not expect that you will encounter many, if any, errors while running HomeRun XL 3.5. However, if you do encounter an error, we want you to know that HomeRun XL 3.5 has the ability to handle it and to help resolve it.

If an error occurs, the error-handler determines the severity of the error and handles it accordingly. Information about an error is recorded in an errors table, which is displayed on the Errors form. You can reach the Errors form from the Admin menu Errors option.

You use the information on the Errors form to resolve errors and to report them to the LeBlanc & Associates

When the Errors form first appears, it shows information for the last error that occurred for the current user. The errors are shown in descending order of the time and date the errors occurred.

You can:

- **Order:** Change the order to ascending through the Order button on the Errors form.
- **All Users:** If you've implemented User Access Security in HomeRun XL 3.5, you can view errors for all users who have run HomeRun XL 3.5 by clicking the All Users option button in the Filter box.
- **All Apps:** If HomeRun XL 3.5 is sharing its error file with another LeBlanc & Associates application, you can view errors for all applications by clicking the All Apps option button in the Filter box.
- **Form Controls:** You cannot edit or add error records but you can delete them.
- **Memory:** Click the Memory button to see the contents of memory variables and arrays when the error occurred.
- **Status:** Click the Status button to see the status of the FoxPro environment when the error occurred.

The following table explains the fields on the Errors dialog.

Errors Fields	Contents
User ID	Blank if User Access Security is not on in HomeRun XL 3.5; otherwise, contains the ID of the user who experienced the error.
App Prefix	3-character prefix of the application that produced the error.
Error #	FoxPro error number.
Date/Time	Date and time the error occurred.
Message	FoxPro error message.
Program	Program routine running when the error occurred.
Code	Code line that produced the error.
Line #	Number of code line that produced the error.
GET Field	Name of GET field, if any, cursor was on when error occurred.
Last Key	Last key pressed before error.
Top Window	Topmost window, if any, when error occurred.

Errors Report

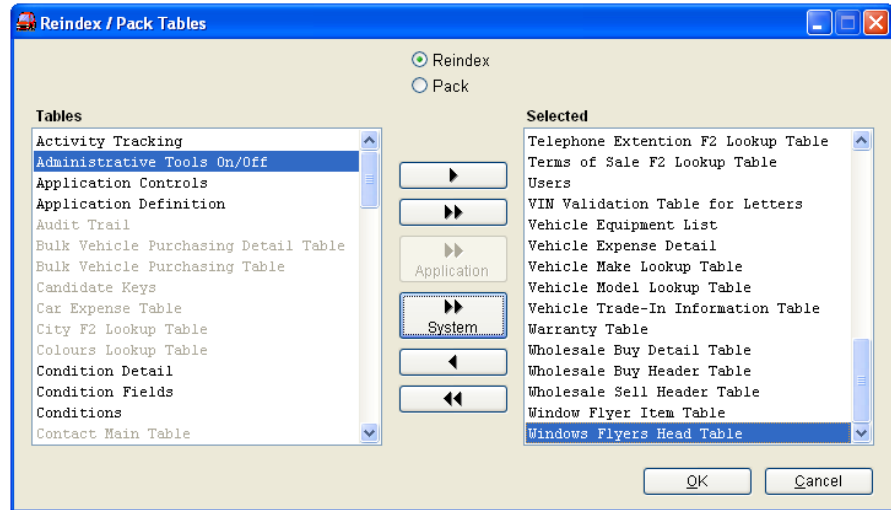
The HomeRun XL 3.5 Report Manager contains an errors report. The errors report prints error records in the errors table. You can select the report's order, filter and scope.

Errors Management

Periodically, backup the errors table and delete its records. You can use the Group Delete on the Errors form.

Reindex / Pack Tables Utility

HomeRun XL 3.5 contains a Reindex / Pack Tables utility on HomeRun XL 3.5's File menu. This utility allows you to recreate indexes if they become corrupt. You can also use the utility to pack tables to remove any records marked for deletion and to pack memo fields.



➤ To use the Reindex / Pack Tables Utility

1. Click either the Reindex or the Pack option button. If you select Pack, HomeRun XL 3.5 will also reindex the tables you select.
2. The Tables list on the left side of the dialog shows all the tables in HomeRun XL 3.5, including system tables. You select the Tables you want to reindex or pack. When you select a table, the Selected Tables list on the right side of the dialog displays the table's name.
3. You can select:
 - A table individually by highlighting it in the Tables list and double-clicking it or clicking the right-arrow button.
 - All tables by clicking the double-right-arrow button.
 - All non-system HomeRun XL 3.5 tables by clicking the Application button. HomeRun XL 3.5 identifies non-system tables as the tables whose names do not begin with "S".
 - All system tables by clicking the System button. HomeRun XL 3.5 identifies system tables as the tables whose names begin with "S".

System Tables: System tables are tables that contain data used by standard HomeRun XL 3.5 functions such as the data dictionary, audit trail, error handler, etc. Non-system tables are tables that contain your data files.

4. You can remove tables from the Selected Tables list by:
 - Highlighting an individual table and double-clicking it or clicking the left-arrow button.
 - Clicking the double-left-arrow button. HomeRun XL 3.5 will remove all tables from the Selected Tables list.
5. When you have selected the tables you want, click OK and the reindex or pack operation begin.

Security

Overview

Users of professional business database applications expect extensive security features in the applications they use. They expect User Access Security, Access Levels Security, Menu Security, Controls Security and Field Security. Fortunately for you, HomeRun includes those security features.

This chapter describes the HomeRun security features by showing how to turn on and set up security for application users.

Implementing Security for Users: The following sections of this chapter describe how to turn on and set up security for application users:

- **Turning On Security:** See “Turning on Security page 86.
- **User Access Security:** See “User Access Security” on page 89.
- **Access Levels Security:** See “Access Levels Security” on page 94.
- **Menu Security:** See “Menu Security” on page 95.
- **Controls Security:** See “Controls Security” on page 98.
- **Field Security:** See “Field Security” on page 101.
- **User Security Mistakes and How to Recover:** “User Security Mistakes and How to Recover” on page 104.

Turning on Security

You turn on User Access Security, Controls Security, Field Security and Menu Security on the Admin Tools dialog. You reach the Admin Tools dialog from your application’s Admin – Security menu.



A check in a Security check box on the Admin Tools dialog turns a Security tool on.

Caution: Do not turn on security until you know how HomeRun security works and how to set it up. If you can't wait until you've read this chapter to turn on security and you wind up locking yourself out of HomeRun, see "User Security Mistakes and How to Recover" on page 104. Then, vow to read this chapter before you turn on security again.

By Default, groups of users have been set up within HomeRun security. The Groups that have been set up are as follow:

- **DEV:** This group is reserved for the HomeRun staff to be used in case you should lock yourself out of the program. This Group is set up to have Access Security Level of "A".
- **MGR:** This group is for the Administrator, Owner or Manager. It gives you full Management Permission to all fields, controls, tables. This Group should be set up to have Access Security Level of "B". An initial user is set up in HomeRun by default. We will give you this User Name & Password when you purchase the program. All other users have to be set up by you.
- **SMG:** This group is for the Senior Managers. It has been modified from the MGR group to not allow as many features as given to the manager level. You can add or not allow control to features in the program when you allow this level for individual users. This Group should be set up to have Access Security Level of "C"
- **US1:** This group is one of 2 groups set up for day to day users. This group will not allow permission to some groups or Menu items, but will allow to see cost on the Bills of Sale & Vehicle Info form. This Group should be set up to have Access Security Level of "D".
- **US2:** This group is for the lowest group of Users. This level will not allow this User to see any costs. Will also not be able to run any security or cost reports. This Group should be set up to have Access Security Level of "E"

User Access Security Must Be On: When User Access Security is off, Controls Security, Field Security and Menu Security are off even if they are checked on the Admin Tools dialog. A user must log into an application with a User ID and a Password before Controls, Field and Menu Security can function.

Access Levels Security: You turn on Access Levels Security by entering an "B" in the first character of the Status field for a user on the Users form. See "Access Levels Security" on page 94. If you are the system supervisor, make sure that the first user for whom you enter a "B" is you. The "A" is for the Developer. This allows us to be able to access your system if you should lock yourself out by mistake. **Tip:** Access Levels Security is not turned off when User Access Security is off. This adds another layer of protection to HomeRun security.

Password Access Security: You turn on Password Access Security by checking the Access check box on the Passwords form. If you are the system supervisor, make sure that the first user for whom you check the Access check box is you. **Tip:** Password Access Security is not turned off when User Access Security is off. This adds another layer of protection to HomeRun security.

Setting Up the System Supervisor

The first user entered on the Security Users form is normally the system supervisor, the person who is responsible for setting up HomeRun security. The first user should be given the highest level of security permissions. Here's a checklist of what you need to do to set up the system supervisor, or first user, before you turn security on:

- **Users Form:** Add a record for the system supervisor on the Users form. You will need a User ID and Temporary Password for the system supervisor. See "Users" on page 91.
- **Access Level:** Enter a "B" in the first character of the Status field on the User form. That will turn on Access Level Security. You don't have to turn on Access Level Security right away. You can always do it later. However, when you do turn on Access Level Security, be sure to do it by entering an "B" for the system supervisor first.
- **Multiple Login:** Check the Multiple check box.
- **Control Permissions:** By default, the form controls for which Controls Security is set up are denied, or disabled, for a new user. Grant the system supervisor permissions for all the form controls. Click the Control Permissions button on the Users form and click the "Grant to All" button on the Control Permissions dialog.
- **Menu Permissions:** By default, a new user is denied access to all menu options. Grant the system supervisor permissions for all menu options. Click the Menu Permissions button on the Users form and click the "Include All" button on the Menu Permissions dialog.
- **Field Permissions:** By default, a new user has full access to all fields on all forms. Therefore, you don't need to do anything to give the system supervisor full Field Permissions.
- **Password Access:** Check the Access check box on the Passwords form. That will turn on Password Access Security. You don't have to turn on Password Access Security right away. You can always do it later. However, when you do turn on Password Access Security, be sure to do it by checking the Access check box for the system supervisor first.

Turn on Security: After you have done the above, use the Admin tools dialog to turn on User Access Security and any other security tools you want. The next time the system supervisor runs HomeRun, they will need to enter their User ID and Password to login.

Setting Up Other Users

To set up security for other users, you follow the same basic procedure as for the system supervisor. However, you grant other users a lower security level, or less permission. Also, you can create Menu and Control Permission Groups to avoid having to set up Menu and Controls Security Permissions for each user. If you use Field Security, you must create Field Permission Groups. Permission Groups are explained in later sections of this chapter.

User Access Security

User Access Security prevents unwanted entry into HomeRun. User Access Security requires users to enter a valid User ID and Password before they can access an application.

Tip: When HomeRun is installed, User Access Security is turned off. You must enter users and their passwords on the Users form before User Access Security can be turned on through the Admin Tools dialog. See the “Users” section below.

User Login

When you run HomeRun with User Access Security on, HomeRun displays the User Login dialog.



Enter your ID and password. If you press the escape key, you will exit HomeRun. You are allowed three attempts to enter a valid password. Upon the third invalid entry, you exit HomeRun.

Temporary Password: When you enter a new user on the Users form, you enter a temporary password for the user. When the user enters HomeRun for the first time, the user will be prompted to enter a new password of the user’s own choosing. The purpose of this feature is to allow only the user to know their password after the system supervisor assigns a temporary password.

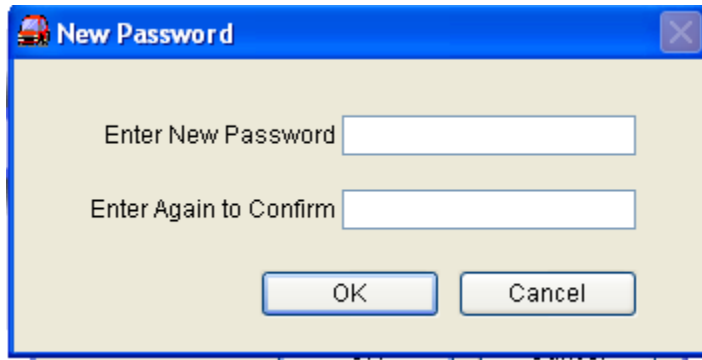
Password Expiration: After you enter a valid password, HomeRun checks to see if it is time to change your password. It is time to change your password if the current date is equal to or greater than the date calculated by adding the Password Period in your User record to the date you last changed your password.

Changing Your Password: You may enter a new password at any time by entering the “Change Character” after your password on the User Login dialog. The Change Character is a question mark, “?”, but the system supervisor can make it another character. The Change Character is described in “Password Setup” on page 90.

If a new password is to be entered, HomeRun displays the New Password dialog.

New Password

The New Password dialog requires you to enter a new password that conforms to the rules entered on the Password Setup form (see next section).

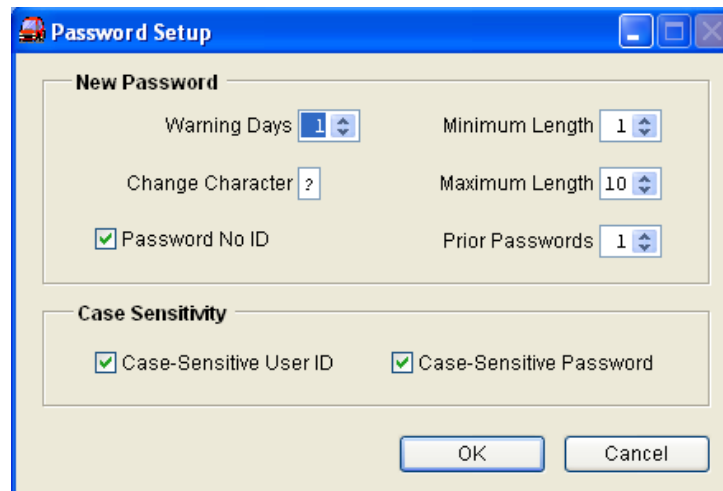


The 'New Password' dialog box has a blue title bar with a car icon and the text 'New Password'. It contains two text input fields: 'Enter New Password' and 'Enter Again to Confirm'. Below these fields are two buttons: 'OK' and 'Cancel'.

After you enter a valid password, you must enter it again to confirm your entry. This is necessary because the entries are hidden from view and you may have entered something other than what you had intended. If you decide to not enter a new password, pressing the escape key or Cancel will exit HomeRun.

Password Setup

The Password Setup form on the Admin - Security menu is where you define the rules for entering new passwords.



The 'Password Setup' dialog box has a blue title bar with a car icon and the text 'Password Setup'. It contains two sections: 'New Password' and 'Case Sensitivity'. The 'New Password' section has five fields: 'Warning Days' (1), 'Minimum Length' (1), 'Change Character' (?), 'Maximum Length' (10), and 'Prior Passwords' (1). The 'Case Sensitivity' section has two checkboxes: 'Case-Sensitive User ID' and 'Case-Sensitive Password', both of which are checked. At the bottom are 'OK' and 'Cancel' buttons.

The fields on the Password Setup dialog are described below.

- **Warning Days:** The number of days prior to the password expiration date that a warning dialog will be displayed. The warning shows the expiration date and allows a user to change passwords immediately.
- **Change Character:** Holds the character that when appended to the password on the Login dialog, signifies that the user wants to enter a new password. The default Change Character is a question mark, "?".
- **No ID in Password:** Check this box to prevent users from putting their User ID in their password.
- **Minimum Length:** A number from 1 to 10 that represents the least number of characters that can make up a password.
- **Maximum Length:** A number from 1 to 10 that represents the greatest number of characters that can make up a password.
- **Prior Passwords:** A number that represents how many prior passwords will be checked to prevent duplicate entry. An entry of one means that the

user's current password cannot be reused. An entry of five means that the user's current and four immediately preceding passwords cannot be reused.

Users

You access the Users form from the Users option on the Admin - Security menu. The Users form is where you enter and maintain information about the people who will be using HomeRun.

Click the New button on the toolbar and enter a new user's information in the fields shown. The fields on the Users form are described below.

- **User Number:** A 10 character field used to identify the user in the organization.
- **User ID:** A 10 character field which identifies the user to HomeRun. You enter your User ID on the Login dialog when you run HomeRun.
- **Status:** A 10 character field used to store information about a user. You can use characters 2 through 9 to store any information you need.

Access Level: The first character of the Status field is reserved to hold a user's Access Level, if any. See "Access Levels" on page 94.

- **Login Status:** Checked if the user is currently logged into HomeRun. If a user is logged-in when HomeRun is abnormally terminated due to a power failure, rebooting, etc., the contents of this field may be incorrect. If the user has not been given Multiple Login rights as described below, the user will not be allowed to re-enter HomeRun. In this case, the system supervisor will have to uncheck the user's Login Status check box so that the user can re-enter HomeRun.
- **Multiple Login:** If checked, the user can login to HomeRun from more than one computer at the same time. The user can also re-enter HomeRun if it terminates abnormally as described above. If unchecked, the user can only login if the Login Status field is unchecked.

Multiple Login Tip: At least one user should be given the multiple login right so that all users would not be locked out of HomeRun if there is a power failure, etc.

- **First Name:** A 20 character field for the user's first name.
- **Middle Name:** A 20 character field for the user's middle name.
- **Last Name:** A 20 character field for the user's last name.
- **Temporary Password:** When a user is first added on the Users form, enter a temporary password in this field. Then, when the user enters HomeRun for the first time, the user will be prompted to enter a new password of the user's own choosing.

Temporary Password Tip: Any time you make an entry in this field, the next entry into HomeRun by the user will require the user to enter a new password.

- **Password Last Change Date:** This field contains the date of the last password change.

Password Last Change Date Tip: Blanking-out this field will cause the user to be required to enter a new password upon the next entry into HomeRun.

- **Password Period:** This field contains a 3-digit number that represents the number of days that, when added to the Password Last Change date, is the date on which the user must next change passwords. Use this field to enforce your password change requirements.

Password Period Tip: An entry of zero means that the user can keep the same password indefinitely.

- **Control Permissions Group:** A 3 character field used to assign the user the same control permissions as all other members of the same group. This way, individual control permissions do not have to be assigned to each member of the group. See "Controls Security" on page 98.
- **Control Permissions:** The Control Permissions button brings up the Control Permissions dialog where control permissions are assigned. If there is no entry in the Control Permissions Group field, you can click the Control Permissions button to select control permissions for the individual user. If there is an entry in the Control Permissions Group field, the Control Permissions dialog will only display the permissions assigned to the group. You may not change these assignments. The group's control permissions may be changed through the Control Permission Groups dialog accessed from the Admin - Security menu. See "Controls Security" on page 98.
- **Field Permissions Group:** A 3 character field used to assign the user the same field permissions as all other members of the same group. See "Field Security" on page 101.
- **Menu Permissions Group:** A 3 character field used to assign the user the same menu permissions as all other members of the same group. This way, individual menu permissions do not have to be assigned to each member of the group. See "Menu Security" on page 95.
- **Menu Permissions:** The Menu Permissions button brings up the Menu Permissions dialog where menu permissions are assigned. If there is no entry in the Menu Permissions Group field, you can click the Menu Permissions button to select menu permissions for the individual user. If there is an entry in the Menu Permissions Group field, the Menu Permissions dialog will only display the permissions assigned to the group. You may not change these assignments. The group's menu permissions may be changed through the Menu Permission Groups dialog. See "Menu Security" on page 95.

- **Report Manager Type:** Select the Report Manager functionality you want for the user. You have the following two choices:
 - **Edit & Run:** The Report Manager will allow the user to both edit and run reports.
 - **Run Only:** The Report Manager will allow the user to only run reports.

When the “By User” Report Mgr Type is selected for HomeRun on the Environment dialog (see “Report Mgr Type” on page 17), the Report Manager will configure its functionality based on the Report Manager Type selected for the user on the Users form. If User Access Security is not on when HomeRun runs, the Report Manager functionality will default to Edit & Run.

New User Log In For The First Time

When you set up a new user, they will have to change their password the first time they log into HomeRun.



Security Reports

There are two reports on an application’s Security menu. They are the Users and Passwords reports. These reports are run from menu options instead of the Report Manager so that you can use Menu Security to prevent unauthorized users from running them.

Access Levels Security

There is additional security for the Users and Passwords forms. On the Users form, the first character of the Status field is designated as the user's Access Level. As soon as one user has an "B" in the first character of the Status field, Access Level security is turned on for HomeRun.

Once Access Level security is turned on, the Access Level values in the first character of the Status field have the following meaning:

- **Blank:** The user will not be allowed to access the Users or Passwords forms.
- **A-Z:** The user can access the Users or Passwords forms, but the user will only be able to view users whose Access Level is blank or less than or equal to her own Access Level. Level A is the highest and Z is the lowest Access Level. A user cannot assign an Access Level higher than her own. If an "B" Access Level has not been assigned when a user enters the Users form, Access Level Security is turned off and the user can view all records and enter any Access Level.

Warning: If you're the system supervisor, be sure you turn on Access Level Security by assigning yourself a "B" Access Level before you give another user an "C". If you turn on Access Level security by giving another user an "C" first, and you now can't access the Users or Passwords forms, see "User Security Mistakes and How to Recover" on page 104.

Menu Security

Menu Security prevents users from accessing menu options that the system supervisor decides they should not access. Users do not even see the options that they cannot access.

Because Menu Security is assigned to individual users, Menu Security is disabled if User Access Security is turned off.

Tip: When HomeRun is installed, Menu Security is turned off. This is done because users and their passwords must be set up and menu permissions must be assigned before Menu Security is turned on through the Admin Tools dialog.

Warning: Do not turn on Menu Security before assigning Menu Security permissions. If you do, HomeRun will have no menu options when you run it. If this happens, see “User Security Mistakes and How to Recover” on page 104.

Assigning Menu Permissions

When a new user is added on the Users form, the user does not have permissions for any menu options. You must assign menu permissions to the new user.

You can assign Menu Security permissions to users in two ways:

- **Individual Menu Permissions:** You can assign menu permissions to a user on an individual basis through the Menu Permissions button on the Users form.
 1. Display the user’s record on the Users form.
 2. Click the Menu Permissions button on the Users form. HomeRun displays the Menu Permissions dialog.
 3. Follow the instructions in the “Menu Permissions Dialog” section below to assign individual permissions.
- **Group Menu Permissions:** You can assign a user to the menu permissions that have already been assigned to a group of users.
 1. Display the user’s record on the Users form.
 2. Enter the code of the menu permission group to which the user should belong in the Menu Group field. With the cursor on the Menu Group field, press F2 or right-click on the field and select Picklist from the shortcut menu to see a list of the menu permission groups that you have set up.
 3. Follow the instructions in the “Menu Permission Groups Dialog” and “Menu Permissions Dialog” sections below to set up menu permission groups and assign group permissions.

Menu Permission Groups Dialog

If a group of users will have the same permissions, you can create a menu permissions group and assign permissions to the group. Then, users can simply be assigned to this group instead of having to assign permissions to users individually.

You reach the Menu Permission Groups dialog from the Admin - Security menu.



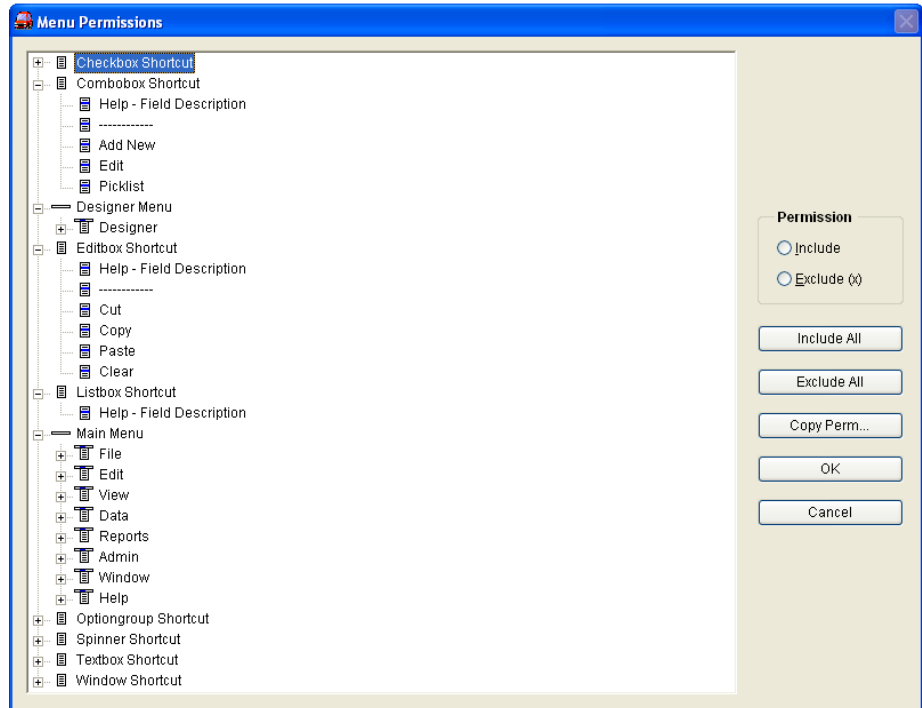
Click the New toolbar button to add a record for a new menu permission group. The fields and button on the Menu Permission Groups dialog are described below.

- **Group Code:** A three character code to identify the group.
- **Description:** A descriptive title for the group.
- **Permissions:** Click the Permissions button to bring up the Menu Permissions dialog to assign permissions to the group. See the next section.
- **Comments:** A place for you to describe the group.

Menu Permissions Dialog

You use the Menu Permissions dialog to assign menu permissions to individuals and groups. You can reach this dialog from:

- The Menu Permissions button on the Users form when you are assigning permissions for an individual.
- The Permissions button on the Menu Permission Groups dialog when you are assigning permissions for a group.



The fields and control buttons on the Menu Permissions dialog are described below.

- **Menu:** Displays the description of the menu that contains the menu option highlighted in the menu options list.
- **Menu Options List:** The menu options from all menus are displayed in the menu options list. To the right of each menu option is the permission status. A blank means that the option will be included in the user's menu. An "X" means that the option will be excluded from the user's menu. By default, all menu options are excluded when the Menu Permissions dialog is first accessed for a group or individual.

Tip: All menus, including shortcut menus, are listed in the menu options list.

- **Include / Exclude:** Click on the Include option button to include the highlighted menu option in the user's menu. Click on the Exclude option button to exclude the highlighted menu option from the user's menu. Double-clicking on a menu option toggles its include/exclude status.

Tip: Be sure to include the File/Exit menu option so that the user has a way to exit HomeRun.

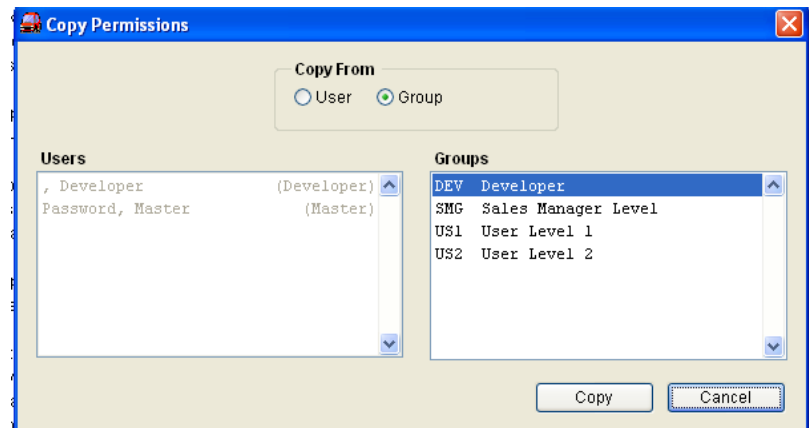
- **Previous Menu / Next Menu:** The menu options list contains all of the options of all of the menus in HomeRun. Clicking the Previous Menu button highlights the first menu option of the next menu up the list. Clicking the Next Menu button highlights the first menu option of the next menu down the list.
- **Include All / Exclude All:** Clicking the Include All or Exclude All buttons changes the status of all menu options to "included" or "excluded", respectively.
- **Copy Permissions:** Clicking the Copy Permissions button brings up the Copy Permissions dialog where you can copy the permissions assigned to a

user or group and make them the permissions of the current user or group. See the next section.

- **OK:** When you click OK, a record is created for each menu option for which permission has been granted.

Copy Permissions Dialog

The Copy Permissions dialog allows you to assign the permissions of a selected user or group to the current user or group.



- **Copy From User / Group:** Click on the User option button if you want to copy the permissions of a user. Click on the Group option button if you want to copy the permissions of a group.
- **Users List:** When the User option button is selected, the Users list is enabled. Highlight the user whose permissions you want to copy.
- **Groups List:** When the Group option button is selected, the Groups list is enabled. Highlight the group whose permissions you want to copy.
- **Copy:** Click Copy to copy the selected permissions to the Menu Permissions dialog.

Controls Security

Controls Security allows the system supervisor to enable and disable controls on forms and on the form toolbar by user. For example, if you have a button on a form that runs a process that only certain users are authorized to see, you can put Controls Security on that button so that it will only be enabled for authorized users.

Because Controls Security is assigned to individual users, Controls Security is disabled if User Access Security is turned off.

Tip: When HomeRun is installed, Controls Security is turned off. This is done because users and their passwords must be set up and control permissions must be assigned before Controls Security is turned on through the Admin Tools form.

Assigning Permissions

When a new user is added on the Users form, the user does not have permissions for any controls included in Controls Security. You must assign control permissions to the new user.

You can assign Controls Security permissions to users in two ways:

- **Individual Permissions:** You can assign control permissions to a user on an individual basis through the Control Permissions button on the Users form.
 1. Display the user's record on the Users form.
 2. Click the Control Permissions button on the Users form. HomeRun displays the Control Permissions dialog.
 3. Follow the instructions in the "Control Permissions Dialog" section below to assign individual permissions.
- **Group Permissions:** You can assign a user to the control permissions that have already been assigned to a group of users.
 1. Display the user's record on the Users form.
 2. Enter the code of the control permission group to which the user should belong in the Control Group field. With the cursor on the Control Group field, press F2 or right-click on the field and select Picklist from the shortcut menu to see a list of the control permission groups that you have set up.
 3. Follow the instructions in the "Control Permission Groups Dialog" and "Control Permissions Dialog" sections below to set up control permission groups and assign group permissions.

Control Permission Groups Dialog

If a group of users will have the same permissions, you can create a control permissions group and assign permissions to the group. Then, users can simply be assigned to this group instead being assigned permissions individually.

You reach the Control Permission Groups dialog from the Admin - Security menu.

The screenshot shows a Windows-style dialog box titled "Control Permission Groups". It has a blue title bar with minimize, maximize, and close buttons. The main area is light beige and contains the following elements:

- Group Code:** A text field containing "MGR".
- Permissions:** A button labeled "Permissions..." located to the right of the Group Code field.
- Description:** A text field containing "Manager or Owner".
- Comments:** A large text area with a scroll bar containing the text "Full Management Permission to all fields, controls, tables".

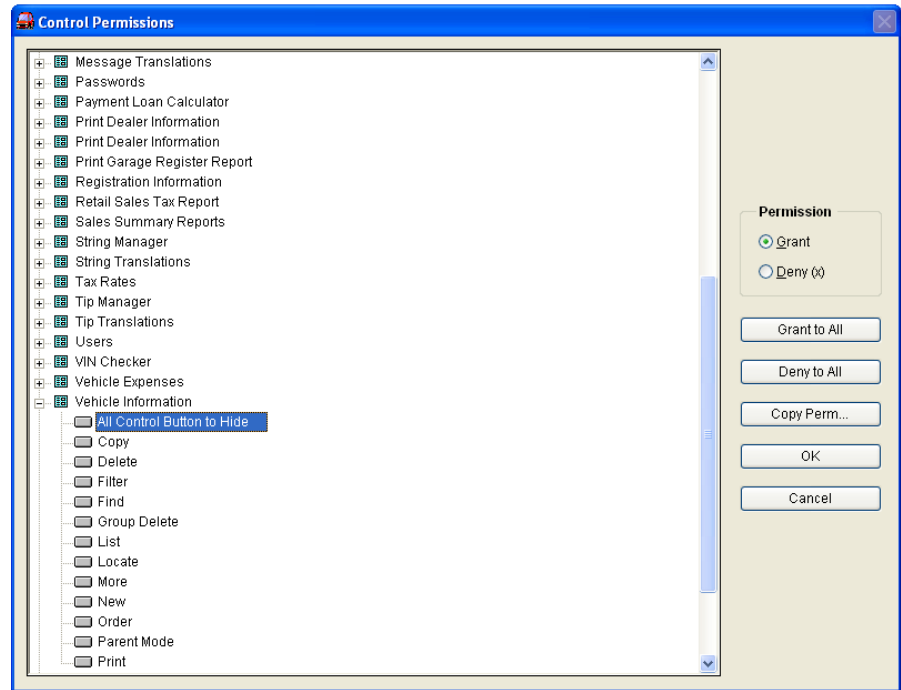
Click the New toolbar button to add a record for a new control permission group. The fields and button on the Control Permission Groups dialog are described below.

- **Group Code:** A three character code to identify the group.
- **Description:** A descriptive title for the group.
- **Permissions:** Click the Permissions button to bring up the Control Permissions dialog to assign permissions to the group. See the next section.
- **Comments:** A place for you to describe the group.

Control Permissions Dialog

You use the Control Permissions dialog to assign control permissions to individuals and groups. You can reach this dialog from:

- The Control Permissions button on the Users form when you are assigning permissions for an individual.
- The Permissions button on the Control Permission Groups dialog when you are assigning permissions for a group.

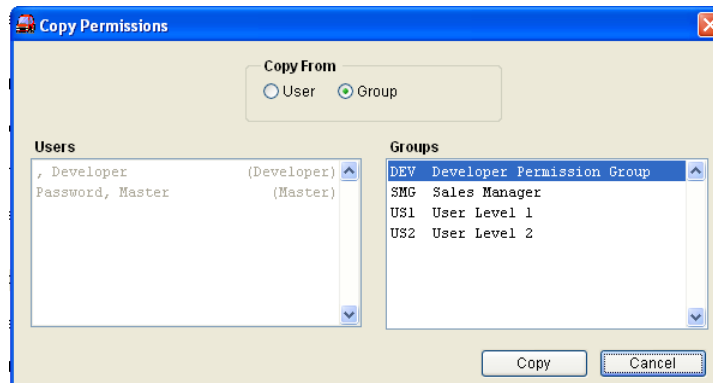


The fields and buttons on the Control Permissions dialog are described below.

- **Forms List:** The captions of HomeRun's forms with Controls Security are listed in the Forms list. Below each caption is a list of the controls for which permission can be granted.
- **Control Permissions:** Double-click on a control to toggle the access permission.
- **Grant to All / Deny to All:** Clicking the Grant to All or Deny to All buttons changes the status of all permissions in all forms to "granted" or "denied", respectively.
- **Copy Permissions:** Clicking the Copy Permissions button brings up the Copy Permissions dialog where you can copy the permissions assigned to a user or group and make them the permissions of the current user or group. See the next section.
- **OK:** When you click OK, HomeRun creates records that store the permission assignments for each control.

Copy Permissions Dialog

The Copy Permissions dialog allows you to assign the permissions of a selected user or group to the current user or group.



- **Copy From User / Group:** Click on the User option button if you want to copy the permissions of a User. Click on the Group option button if you want to copy the permissions of a group.
- **Users List:** When the User option button is selected, the Users list is enabled. Highlight the user whose permissions you want to copy.
- **Groups List:** When the Group option button is selected, the Groups list is enabled. Highlight the group whose permissions you want to copy.
- **Copy:** Click Copy to copy the selected permissions to the Control Permissions dialog.

Field Security

Field Security allows the system supervisor to prevent certain users from viewing or making changes to fields on forms.

No Display: You can prevent data from specified fields from being displayed on a form for selected users.

Display Only: You can also prevent specified fields from being edited by selected users.

Group Not Individual: No Display and Display Only field security is applied to groups of users, not individual users.

Field Security is disabled if User Access Security is turned off because Field Security requires entry of a User Id to identify a user's Field Security permissions.

Tip: When HomeRun is installed, Field Security is turned off. This is done because users and their passwords must be set up and field permissions must be assigned before Field Security is turned on through the Admin Tools form.

Assigning Field Permissions

You assign a user Field Security permissions by assigning the user to a field permission group.

1. Follow the instructions in the "Field Permission Groups Dialog" and "Field Permissions Page" sections below to set up field permission groups and to assign group permissions.
2. Display the user's record on the Users form.
3. Enter the code of the field permission group to which the user should belong in the Field Group field. With the cursor on the Field Group field,

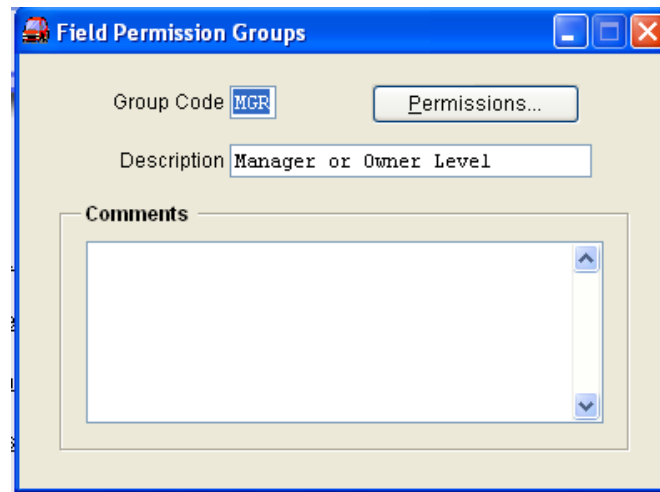
press F2 or right-click on the field and select Picklist from the shortcut menu to see a list of the field permission groups that you have set up.

The field restrictions (no display, display only) can be assigned to any field in the HomeRun Data Manager. See the Field Permissions Page section below for an explanation of how to assign these restrictions to fields and in turn to field permission groups.

Field Permission Groups Dialog

Users that should have the same field permissions can be combined into field permission groups. Users are assigned to a permission group on the Users form.

You reach the Field Permission Groups dialog from the Admin - Security menu.

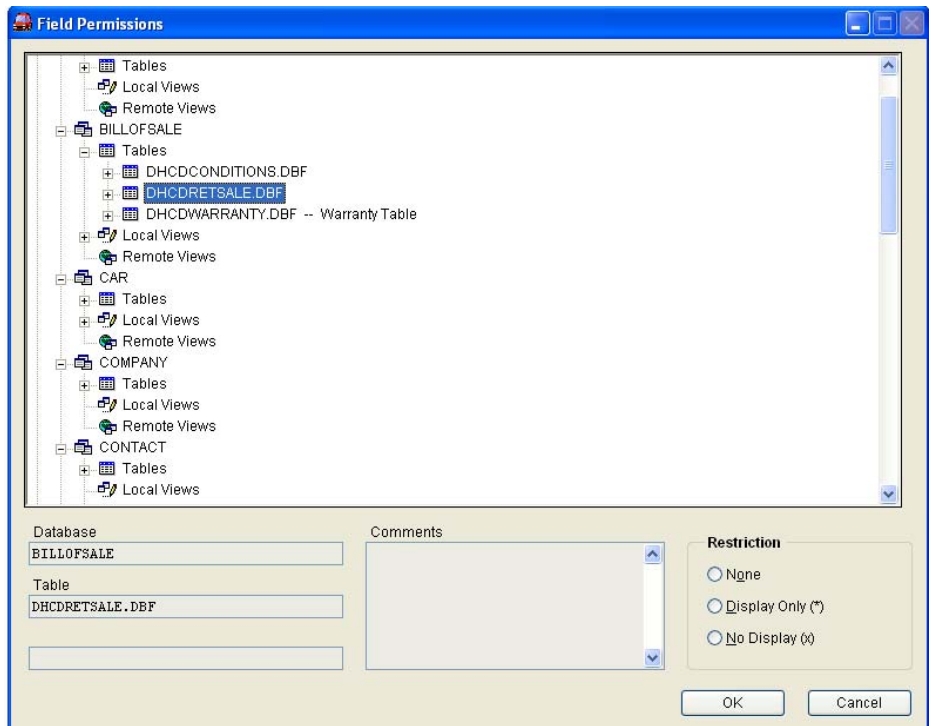


Click the New button on the toolbar to add a record for a new field permission group. The fields on the Field Permission Groups dialog are described below.

- **Group Code:** A three character code to identify the group.
- **Description:** A descriptive title for the group.
- **Comments:** A place to describe the group.

Field Permissions Page

You use the Field Permissions page on the HomeRun Data Manager to assign field permissions (restrictions) to field permission groups. You reach the HomeRun Data Manager from the Admin menu.



The Field Permissions page is described below.

- **Groups List:** The group codes and descriptions of all field permission groups are listed in the Groups list. To the right of each group code and description is the permission (restriction) status. A blank means there is no restriction for the group. A “d” means the Display Only restriction has been selected for this group. An “n” means the No Display restriction has been selected for this group.
- **Restrictions:** Click on the None option button to signify that users in the highlighted group can view and edit this field. Click on the Display Only option button to signify that users in the highlighted group can view the data in this field but not make changes to it. Click on the No Display option button to signify that users in the highlighted group cannot view or make changes to the data in this field.

When you leave the Field Permissions page, HomeRun stores the field permissions you have selected.

User Security Mistakes and How to Recover

Setting up security is a little complicated. If you're not careful, you can lock yourself out of HomeRun or make HomeRun's menu disappear. This section describes some of the security mistakes we've seen and how to recover if the same mistakes happen to you.

Tip: Security mistakes usually happen while you are getting to know HomeRun and before you have read this *Security* chapter. It's not a good idea to "experiment" with HomeRun's security features until you know how they work.

Security Tables

First, you need to know about the following HomeRun security files:

- **Security Tools Control Table File:** SVPMADMINTOOLS2.DBF and SVPMADMINTOOLS2.CDX; this file contains a record for each tool listed on an application's Admin Tools dialog. Each record in this table contains a logical field called "Control_On" that determines whether a tool is on or off.
- **Users Table Files:** SDATAUSERS.DBF, SDATAUSERS.CDX, and SDATAUSERS.FPT; these files contain a record for each person authorized to use HomeRun.

These HomeRun security files are your keys to recovering from security mistakes. If you haven't already done so, make backup copies of these files. You must make your backup copies before you ever start setting up HomeRun Security.

Generally, the key to recovering from a security mistake is to copy your backup copies of these files over the "live" versions of the files in the HomeRunXL3 \DATA directory. In that way, you turn off HomeRun Security so that you can enter HomeRun and correct your security mistake.

Security Mistakes

Now, let's look at some of the mistakes to avoid and how to recover from them.

You Forget Your User ID and Password

You've set up a User on the Users form. You've turned on User Access Security. You forget the User ID and Password, and you haven't written them down. You're locked out of your application:

Recovery: Turn off User Access Security by copying your backup SVPMADMINTOOLS2.DBF and SVPMADMINTOOLS2.CDX table to your HomeRun XL 3.5\DATA directory. Enter HomeRun. Go to the Passwords form on the Admin – Security menu. Write down your User ID and Password. Turn on User Access Security again if you like through the Admin Tools dialog on the Admin – Security menu.

You Turn on Access Levels Security for Another User before Giving Yourself an "B" Access Level

You've set up a user on the Users form and given the user an "B" Access Level. Access Level Security is now on. Your Access Level is still blank. You can't access the Users or Passwords forms.

Recovery: If you or the user with the “B” Access Level can enter HomeRun with that user’s ID and password, you can go to your User record and give yourself an “B” Access Level. That solves the problem.

If for some reason you or the user can’t enter HomeRun with the user’s ID and password to correct the problem, your recovery is a little painful. First, you must turn off User Access Security by copying your backup SDATAUSERS.DBF, SDATAUSERS.CDX, and SDATAUSERS.FPT files to your HomeRunXL3.5 \DATA directory. Of course, now you’ll now have to reenter all user data.

Password Access: A variation on this mistake would be to make the same kind of mistake with the Access check box on the Passwords form. The recovery approach would be basically the same.

You Turn on Menu Security before Assigning Menu Permissions

You turn on Menu Security before assigning Menu Permissions to yourself. The next time you enter your application, there’s no menu. The only way you can exit HomeRun is with the infamous “three finger salute”.

Recovery: If you can enter HomeRun with another ID and password that has access to the Users form, you can go to the Users form and assign Menu Permissions to yourself. That solves the problem.

If for some reason you can’t enter HomeRun with an ID and password to correct the problem, you must turn off User Access Security and Menu Security by copying your backup by copying your backup SVPADMINTOOLS2.DBF and SVPADMINTOOLS2.CDX files to your HomeRunXL3 .5\DATA directory. Then, enter HomeRun and assign Menu Permissions to yourself.

No Exit Permission: A variation on this mistake is to forget to assign yourself or another user permission for the File menu Exit option. If you do that, the HomeRun window close box won’t work because it requires the File – Exit menu option to function. The recovery approach would be basically the same.

Word to the Wise

If you just read the “Security Mistakes” section of this chapter because you started at the beginning of the *Security* chapter and read each section in turn, we commend you. You’re going to do very well with HomeRun.

However, if you’re sitting there locked out of your application with perspiration dripping from your forehead and this is the first time you’ve seen the “Security Mistakes” section, we hope you’ve learned your lesson.

As a last resort, the person we have on file as the key management contact person can call us and we will give you the Master User Name & Password. This will work provided you haven’t changed the password for this user.

Note: For logical reasons, the Master Management password will not be given to anyone else. This is to protect your security.

Tips & Techniques

Overview

This chapter contains a collection of tips and techniques that will optimize your use of HomeRun. As you work with HomeRun, you may compile your own list of useful tips and techniques. If you do, please send them to the LeBlanc & Associates so that we can make them available to other HomeRun users.

Increasing Form Speed

HomeRun puts more functionality into its forms than any other comparable product by far. HomeRun forms include a related forms engine, a relational integrity engine, field security, form controls security, field validation, an audit trail, field messages, activity tracking, and more.

While each of these features provides valuable functionality, they do slow down the operation of HomeRun forms. On some computers the reduction in speed may not justify the functionality provided by certain features.

The purpose of the following sections is to describe changes you can make to HomeRun forms and environment that will increase form speed.

Increasing Form Access Speed

Form access speed refers to the time it takes for a HomeRun form to appear after it's selected from a menu or by clicking the form image while another form is on top.

The following subsections point out some ways you can speed up form access.

Activity Tracking

If your application doesn't need Activity Tracking, turn it off on HomeRun's Admin Tools dialog. You may not notice a marked increase in form access speed after turning off Activity Tracking, but every little bit you can do to increase form speed adds up.

Controls Security

If form controls security is not needed for an application, turning it off on HomeRun's Admin Tools dialog will increase form access speed.

Field Security

If field security is not needed, turning it off will increase form access speed. You can turn off field security for HomeRun on the Admin Tools dialog reached from the Security popup on the Admin menu.

Increasing Save Record Speed

When a user saves a record that has been edited on a form, HomeRun performs a check to make sure that the record's primary key is not duplicated in another record in the table.

When a user saves a record that has been edited on a form, the HomeRun Audit Trail routine adds a record for every field that has been changed on the form to the Audit Trail table. Consequently, the Audit Trail feature slows down the saving of an edited record.

Turn off the Audit Trail for HomeRun

If you don't need the Audit Trail for any forms in HomeRun, you can turn it off on the Admin Tools dialog reached from the Security popup on the Admin menu. This will increase the speed at which records are saved.

Increasing Delete Record Speed

When a record is deleted on a form the HomeRun referential integrity routine is run and audit trail records are created. Both of these processes take time.

Referential Integrity

The HomeRun referential integrity routine is run to find and handle related records in other tables. The referential integrity routine can take a significant amount of time if a table has a lot of related child, grandchild, etc. tables. There is no good way to speed up the HomeRun referential integrity routine other than to forego the referential integrity check. However, it is not recommended that you abandon referential integrity unless absolutely necessary.

Audit Trail

When a user deletes a record on a form, the HomeRun Audit Trail routine by default adds a record to the Audit Trail table for each field in the deleted record's primary key. If you have checked the Del Aud Trail - All Flds checkbox on the Data Manager Table - Properties page, an audit trail record is created for every field in the deleted record. If the table has child, grandchild, etc. related tables with the Cascade rule selected for deletes, records in the related tables are deleted and Audit Trail records are created for the deleted related table records. Consequently, the Audit Trail feature can slow down the deletion of a record significantly.

Turn off the Audit Trail for HomeRun

If you don't need the Audit Trail for any forms in HomeRun, you can turn it off on the Admin Tools dialog reached from the Security popup on the Admin menu. This will increase the speed at which records are deleted.

