

# ERA-IGNITE



## Launch Guide



Retail  
Management  
System

 Reynolds  
& Reynolds®

The logo for ERA IGNITE features the word "ERA" in a bold, white, sans-serif font with a stylized orange flame icon to its left. Below "ERA" is the word "IGNITE" in a similar bold, white, sans-serif font.

# ERA IGNITE

**Don't know where to start with ERA-IGNITE  
now that you've signed up?**

This “Launch Guide” will point you in the right direction. It's organized into three phases: installation, training tools, and daily procedures. Each phase is designed to help you get the most out of your system from the start.

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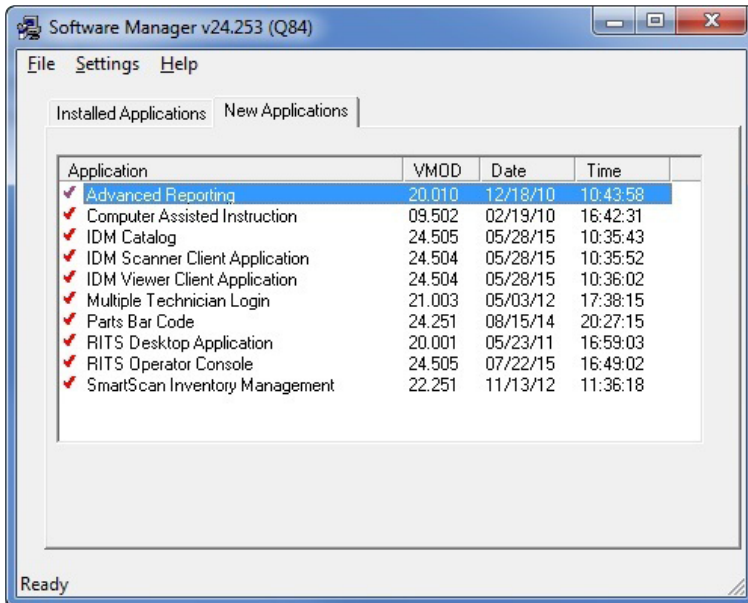


# INSTALLATION

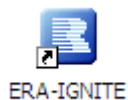
The first step to successfully installing ERA-IGNITE is figuring out which departments and employees will be using it. Once that's determined, it's time to start loading ERA-IGNITE and setting up the right specs.

## Load ERA® Communications Manager:

- Through your Windows® start menu on your PC, select All Programs > Reynolds > Software Manager.
- Choose the **New Applications** tab and double click on **ERA Communications Manager** (If you don't see ERA Communications Manager listed, check the Installed Applications tab. It may already be installed). Once it's finished installing, close Software Manager.



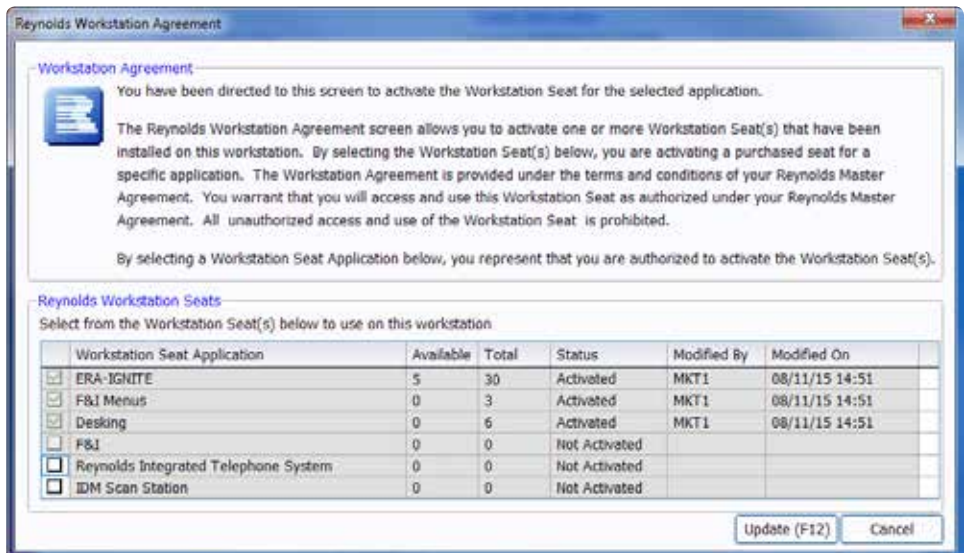
- You'll now see an ERA-IGNITE icon on your desktop.



- Click on it to launch ERA-IGNITE.

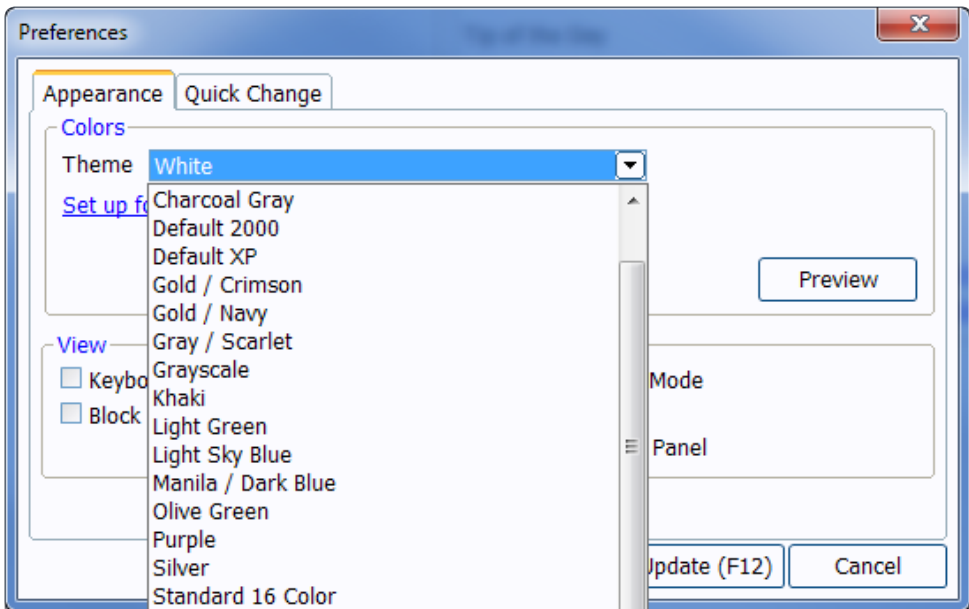
## Install an ERA-IGNITE Seat:

- Open ERA-IGNITE and sign on with a valid User ID and password. You will then be walked through one of two Seat activation processes once you try to access an application that requires a Seat:
  - **Click-Through Activation:** You have available purchased Seats to activate. Place a green checkmark in the box at the left of the screen beside ERA-IGNITE and select **Update (F12)**.
  - **Click-Through Purchase:** You have no pre-purchased Seats left and will need to agree to purchase a new Seat to continue. This new Seat will be added to your monthly billing statement. Once you purchase the Seat, place a green checkmark in the box at the left of the screen beside ERA-IGNITE and select **Update (F12)**.



### Setting up Your Preferences:

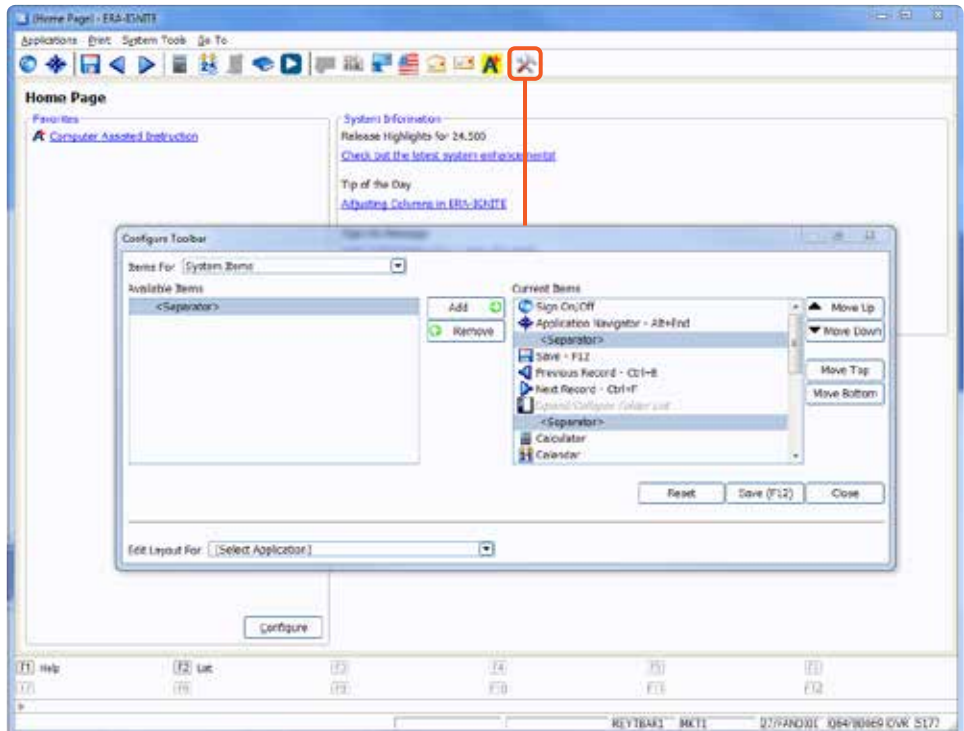
- To change your screen theme and color, visit the Preferences menu. You can find it by clicking on System Tools at the top of your ERA-IGNITE window, selecting Preferences, and then Preferences again.
- **The Colors option** is under the Appearance tab with a wide variety of choices available. Using different colors can come in handy when you have multiple ERA-IGNITE windows open at the same time running different applications.



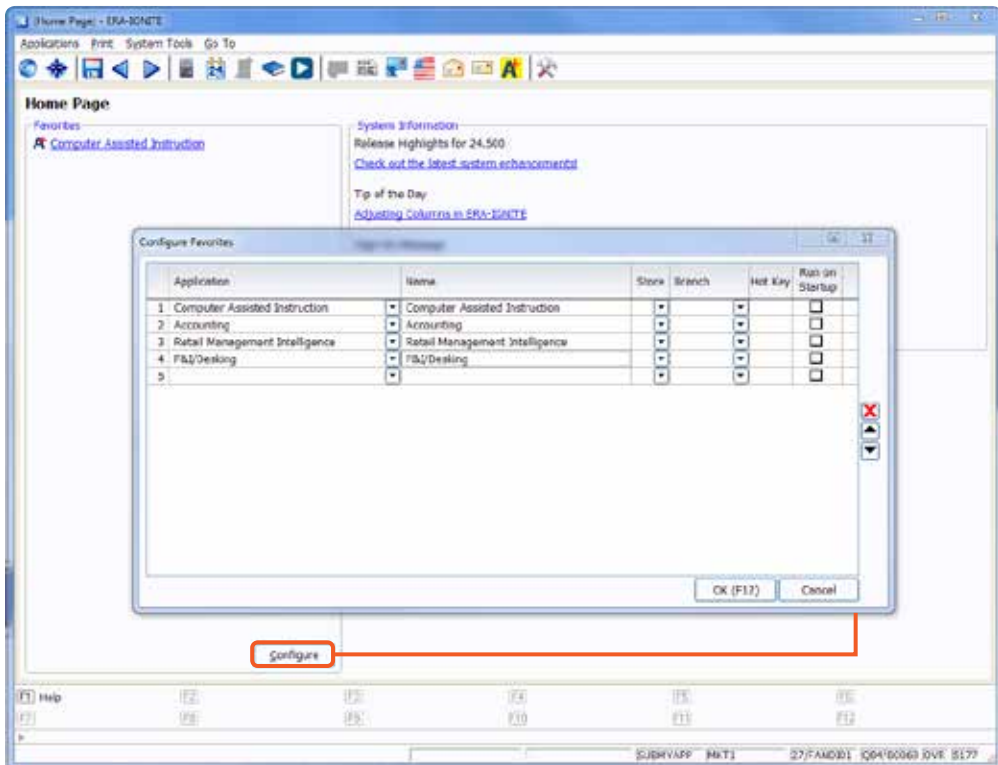


## Setting up Your Preferences:

- The Toolbar at the top of your ERA-IGNITE window contains quick link icons to items such as a calendar, the Retail Management Intelligence application, and the Application Navigator. You have the ability to customize it through the **Configure Toolbar** icon, which is located in the Toolbar and looks like a crossed hammer and wrench. The pop-up allows you to add, remove, or change the order of items within the Toolbar.

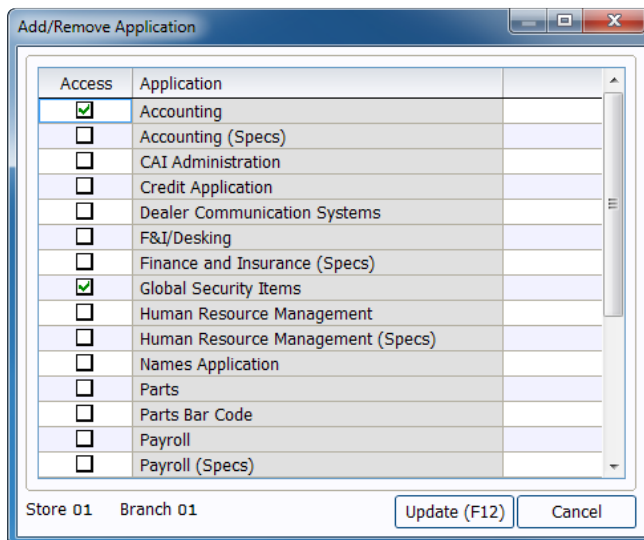


- Click on the **Configure** button along the bottom of the page.
- Select a frequently accessed application from the drop-down menu.
- Change the name of the application to make it easier to identify.
- Select your Store and Branch.
- Designate a **Hot Key** to create a keyboard shortcut for the application.
- Select **Run on Startup** to automatically launch the application when you log into ERA-IGNITE.
- Save your changes by clicking **OK (F12)**.



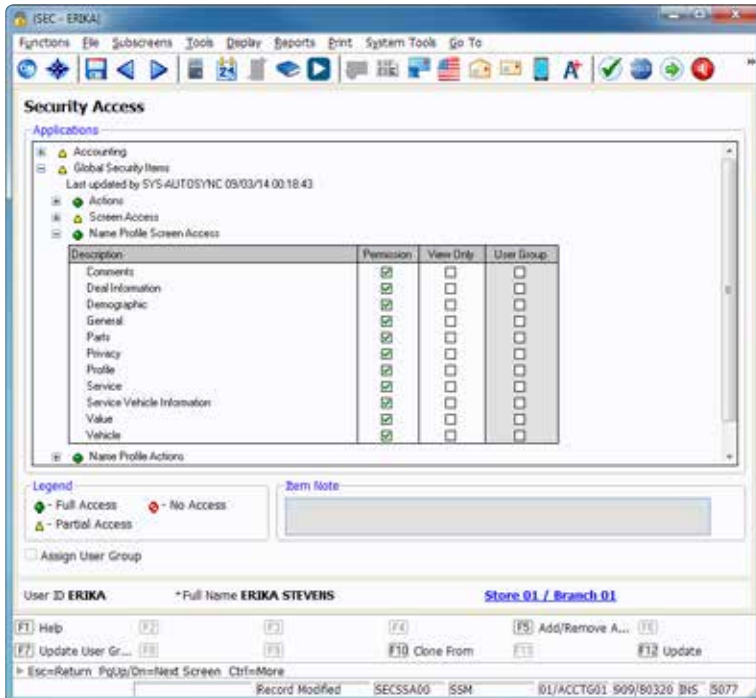
## Setting Up User Security:

- From the Home Page under Favorites or the Application drop-down menu, select the Security Maintenance application. Search for the User ID you want to set up in the **Search/Change Security Profile Record** screen and double click on it in the Results section. If you need to add a new user, click on File at the top of your window and select Add/Clone Security. It will then allow you to create a new User ID from scratch, copy one from an existing User ID, or base it off of a Quick Setup ID. Click on **Add (F12)** when finished.
- Review and make changes to the **Basic Profile Information** screen if necessary.
- Click on **Subscreens** at the top of your ERA-IGNITE window and select **Security Access**. From there, select **Add/Remove Applications (F5)** to grant access to Accounting, Service, etc. Make sure to click on **Update (F12)** to save your changes.




Setting Up User Security:

- Start to expand and contract the folder lists containing the individual security items. You'll notice items have different colors beside them:
  - Green:** Access to all items under that heading.
  - Yellow:** Partial access to some items.
  - Red:** No access to any item under that heading.
- Place a checkmark in the boxes of the actions and screens for which you want the user to have access. If you right click on a folder list you have the option to grant access to everything within that folder list, saving you time from placing checkmarks in every single box. Once you are finished, click on **Update (F12)**.



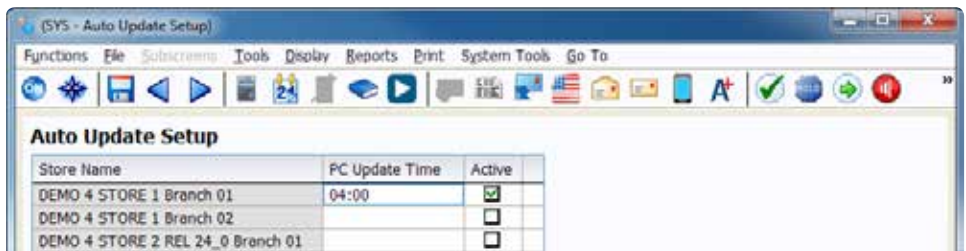
## Logging Off

- When you're ready to close all open ERA-IGNITE applications, simply click on the  icon in the top left corner of your ERA-IGNITE screen. This will close everything and bring you back to the sign-on screen.

## Auto Update Setup

Skip waiting for system updates to download to ERA-IGNITE from Software Manager every morning with the Auto Update function. Here's how:

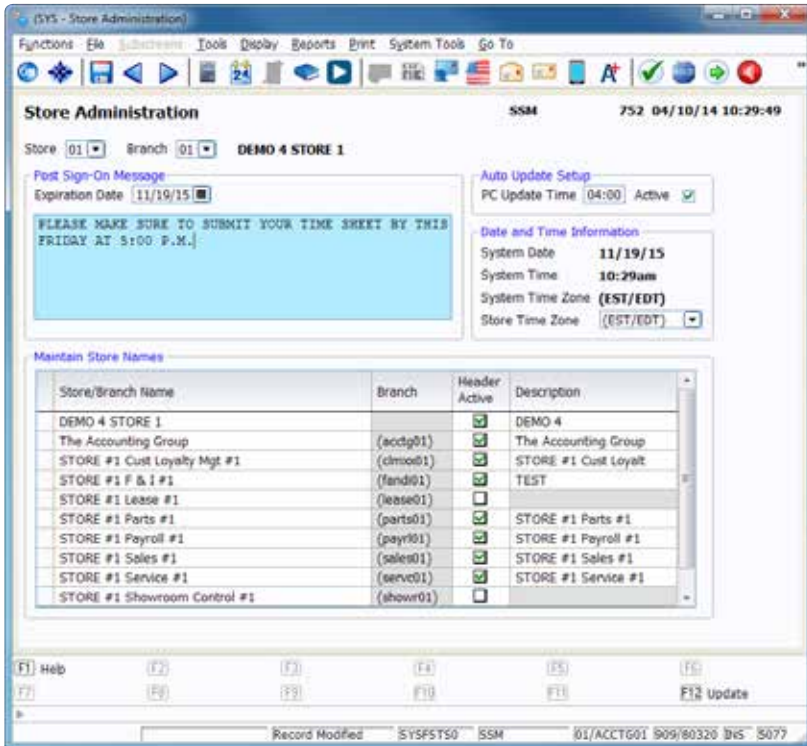
- Open ERA-IGNITE and choose the System Administrator application from your Favorites on the Home Page or from the Applications drop-down.
- Select the **Auto Update Setup** function.
- Set up your PC Update Time and check the Active box for your store and branch. A default time of 4:00 a.m. is recommended to give the server enough time to receive necessary updates. Make sure to click on **F12** to save your changes.



### Sign-on Message

Display a custom sign-on message on the ERA-IGNITE Home Page to keep employees up-to-date on important dealership announcements.

- Open ERA-IGNITE and choose the System Administrator application from your Favorites on the Home Page or the Applications drop-down.
- Select the **Store Administration** function.
- Set up your desired message within the **Post Sign-On Message** box. This message will display until the expiration date you specify. Click on **F12** to save your changes.



# Quick Tips

## Managing Your Seats

- You can easily cancel pending Seat purchases and trade ERAccess sessions in for ERA-IGNITE Seats using the **ERA-IGNITE License Management** screen located within the System Administrator application.
- ERA-IGNITE License Management also allows you to transfer Seats between PCs using the **Transfer License (F4)** option.

The screenshot shows the 'ERA-IGNITE License Management' window with a table of licenses. The table has columns for Station#, Status, Old Through (UserID), Old Through (Username), State, Branch, Store Name, Old Through (Date/Time), Changeable Through Date, In-use, Software, Address, Last Signon (UserID), Last ERAITE (Date - App), and Last ERAITE (Date - Site). A callout box points to a 'Trade In' checkbox in the 'Changeable Through Date' column for the license with Station# 644. Another callout box points to a 'Transfer License' button at the bottom of the window. A third callout box points to a drop-down menu in the 'Status' column for the license with Station# 644.

**Check box to trade in ERAccess session.**

**Drop-down menu to cancel purchase of pending Seat.**

**Transfer License**

**ERA-IGNITE License Transfer**

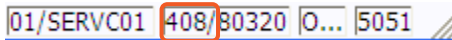
Transfer ERA-IGNITE Seat to Station:

OK (F12) Cancel

## Remove a Seat from a PC

If you need to remove a Seat from a PC, use the following steps:

- Open ERA-IGNITE on the PC of which you want to remove the Seat.
- Write down the 3-digit number in the lower right hand corner that comes before the forward slash.



01/SERV01 408/80320 0... 5051

- Call the Technical Assistance Center Hardware Team (800.767.0080) to have the Seat removed.
- Open ERA-IGNITE on the PC you want the Seat loaded. When you log in you will be prompted to take the Seat which is now available.



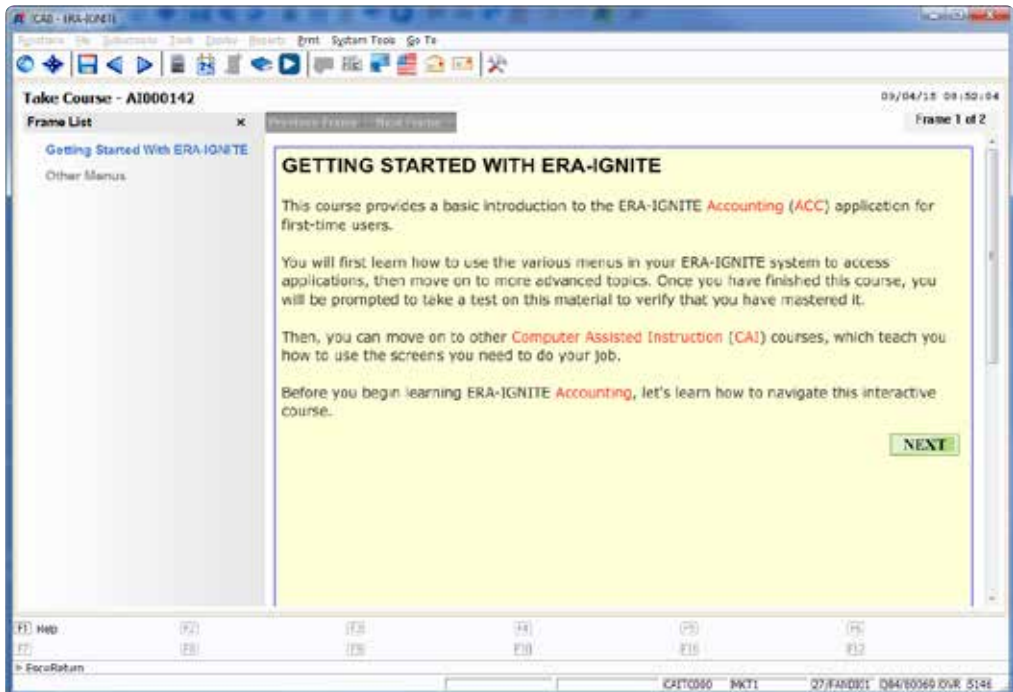


## TRAINING TOOLS

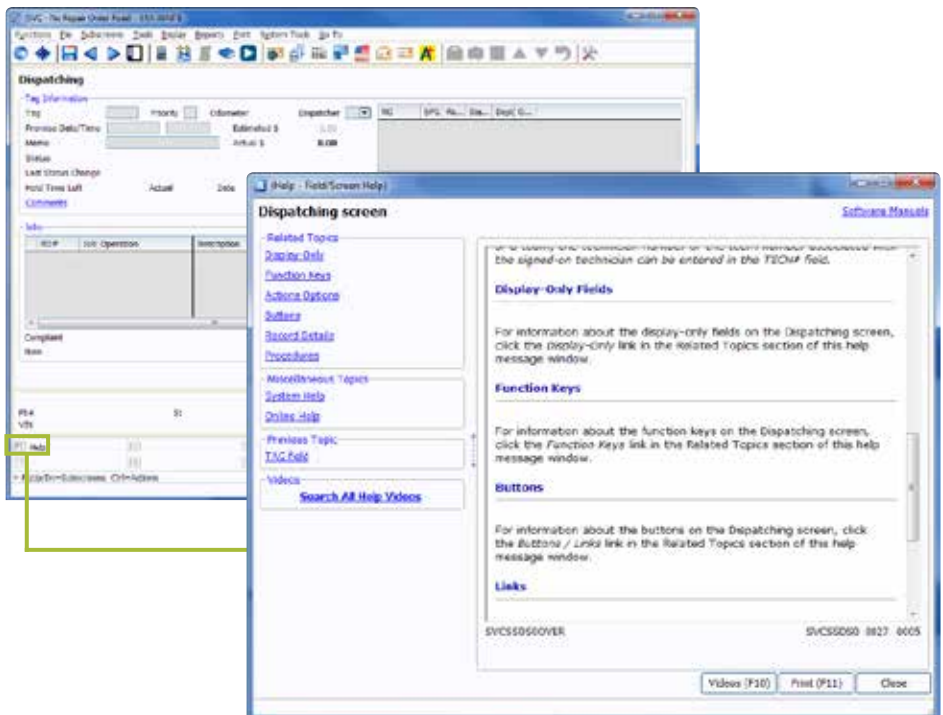
After loading ERA-IGNITE, the next step is getting your employees up to speed on how to use it. There are multiple training options available to help you through the process.

- Save time with free training built right into ERA-IGNITE through **Computer Assisted Instruction**. There are multiple courses available that cover a variety of topics within ERA-IGNITE. Users access the classes from their workstations and complete them on their own time. Classes take about 15 minutes to complete and are assigned based on user security.
- You can access **Computer Assisted Instruction** from the Home Page under Favorites and the Applications drop-down menu, and by using the **A+** icon in the ERA-IGNITE Toolbar.

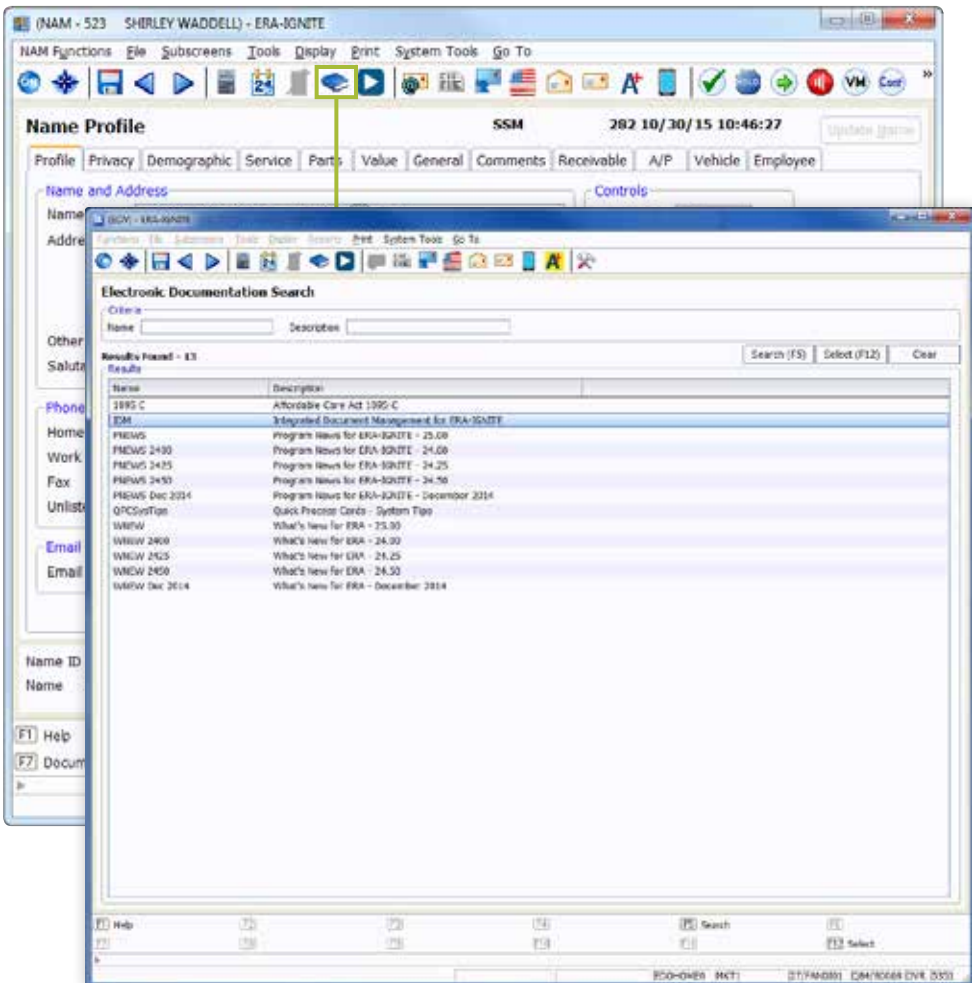
*Note: To prevent a Computer Assisted Instruction lockout, two courses must be completed every 30 days. If you take one course every other week, you will never get locked out of any tasks.*



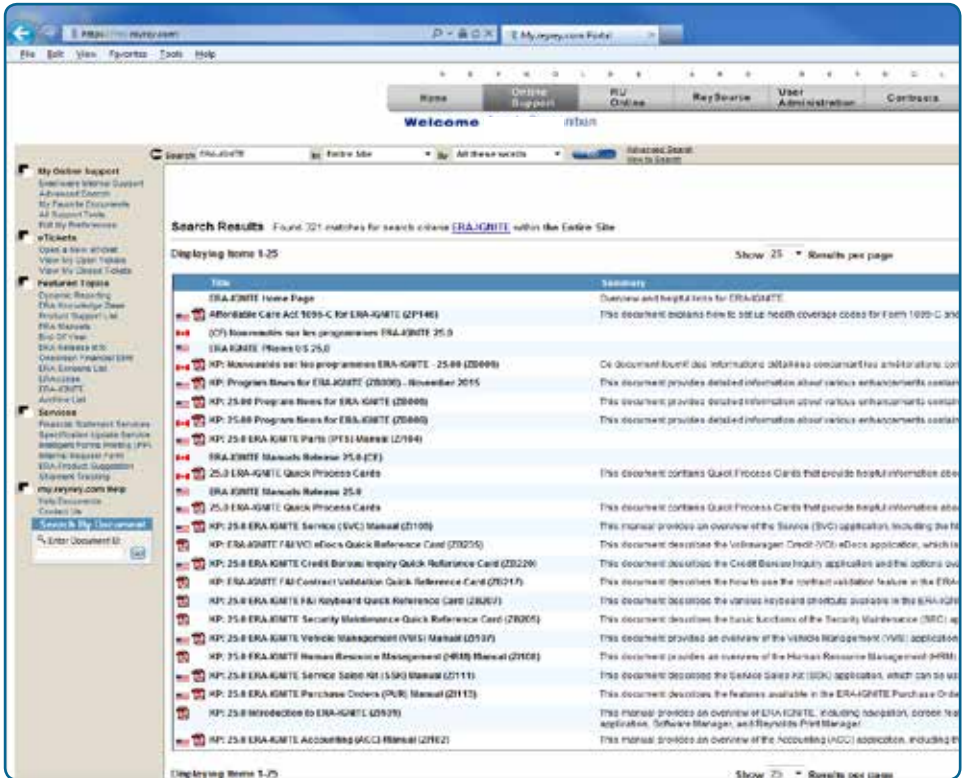
- Get instant help at your fingertips with onscreen help messages in ERA-IGNITE. You can access help at any time by clicking the **Help (F1)** key. By pressing the Help (F1) key a second time, you can access an overview of the current screen.
- Information on specific fields, screen overviews, entire applications, and related topics is available.
- Within Related Topics for many applications, you will find a Procedures link. Procedures gives step-by-step instructions on performing daily functions within the application.
- Short and informative videos are also available for multiple topics and tasks in the Videos section.



- Review application manuals, Program News, and quick process cards from directly within the system.
- You have the ability to search for items based on specific topics or keywords.



- Search online for manuals, recent system enhancements, and other resources related to specific screens and applications on [my.reyrey.com](http://my.reyrey.com).



- **'Net Classes** are offered by Reynolds' Software Education department and feature hands-on training over the Internet. Instructors are able to interact with students and share screens to better understand where extra help is needed.
- **Management Overview Series** 'Net Classes give managers a detailed introduction to how ERA-IGNITE works in their respective departments.
- ERA-IGNITE **Sessions of the Month** introduce new topics each month designed to boost efficiency and productivity.
- Short, free **Webinars** are offered live online monthly and feature information on a variety of topics.
- For more information on all of the above training options, visit [www.reyrey.com/training](http://www.reyrey.com/training), call 937.485.1700, or email the Software Education department at [SED@reyrey.com](mailto:SED@reyrey.com).

- Live **Classroom Training** allows you to learn about your system from a Reynolds instructor away from the distractions of your dealership. These manager-level classes cover a wide range of Reynolds software topics, like accounting or fixed operations, and are offered at one of Reynolds' training centers in Dayton, OH or Houston, TX.
- Available classes:
  - ERA-IGNITE Management and Control.
  - ERA-IGNITE Fixed Operations.
  - ERA-IGNITE Dealer Overview.
  - Contact Management.
- For more information on upcoming classes or to sign up, visit [www.reyrey.com/training](http://www.reyrey.com/training), call 937.485.1700, or email the Software Education department at [SED@reyrey.com](mailto:SED@reyrey.com).

- Receive over-the-phone, on-demand training from the **Distance Learning Center**. Call 800.456.4466.
- Bring Reynolds professionals to your location with **in-dealership training**. Contact your account manager for more information.
- Learn best practices and how to maximize usage with help from **Reynolds Consulting Services**. Call 800.649.7515.





## DAILY PROCEDURES

At this point you're ready to use ERA-IGNITE on a daily basis. The following will guide you through moving you and your employees to ERA-IGNITE from ERAccess.

- Dealer feedback suggests you install ERA-IGNITE by department in this order:

- 1. Sales**

- 2. F&I**

- 3. Service**


- 4. Parts**

- 5. Business Office**

You can choose your own path at any time, but all managers should start within Retail Management Intelligence, ERA-IGNITE's all-in-one reporting tool. It allows them to get acquainted with key ERA-IGNITE capabilities they can use throughout other applications.

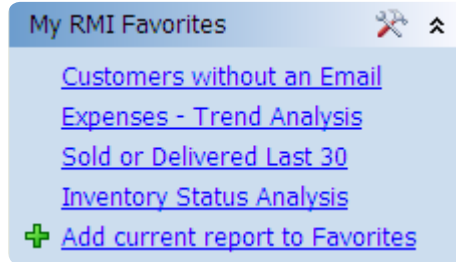
ERA-IGNITE condenses all of your reporting needs into one application: **Retail Management Intelligence**. It includes:

- **Dashboard Reporting:** Monitor key business activities with up-to-the-minute performance data and drill-down capabilities.
- **Dynamic Reporting:** Create and export powerful user-defined reports using Data Sets containing information across multiple stores and branches.
- **Application Reporting:** Access all of your departmental reports from different stores and branches and use filters to display only the information you want.
- **Departmental Daily Operating Control:** Let your managers run their own Daily Operating Control with the ability to restrict access by department through user security.
- **Report Generator Reporting:** Create your own custom reports with easy field and file name lookup options.
- **Monthly Metrics:** Capture key data for performance metrics across the entire dealership to create an end-of-month snapshot.
- **Snapshots:** View Dashboard information on the go with emails sent to you three times a day.

You can access Retail Management Intelligence application from the Home Page under Favorites and the Applications drop-down menu, and by using the Retail Management Intelligence icon  in the ERA-IGNITE Toolbar.

## My RMI Favorites

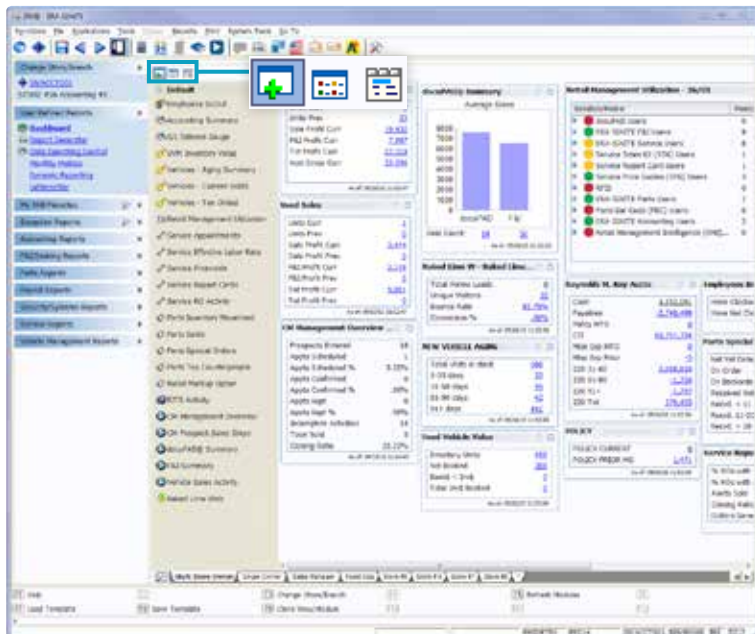
- **My RMI Favorites** allows you to save custom versions of Application, Dynamic Reporting, and Report Generator reports. These reports are then accessible with a single click from the folder list on the left.



## Setting Up Your Dashboard

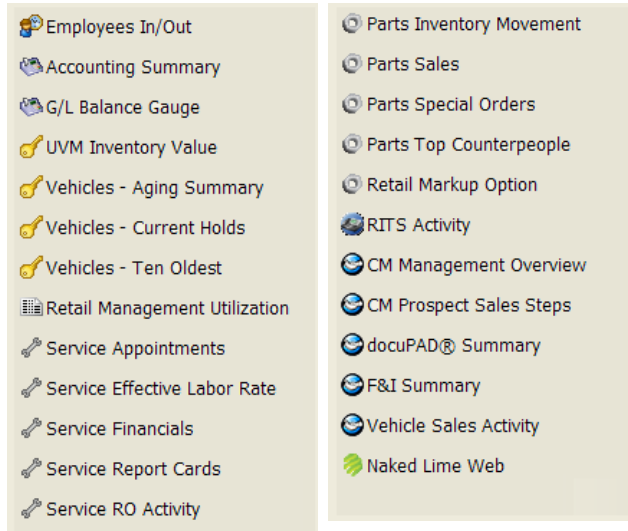
- Setting up your dashboard is as easy as 1..2..3:

### 1. Expand the Module List.



### Setting Up Your Dashboard (cont.)

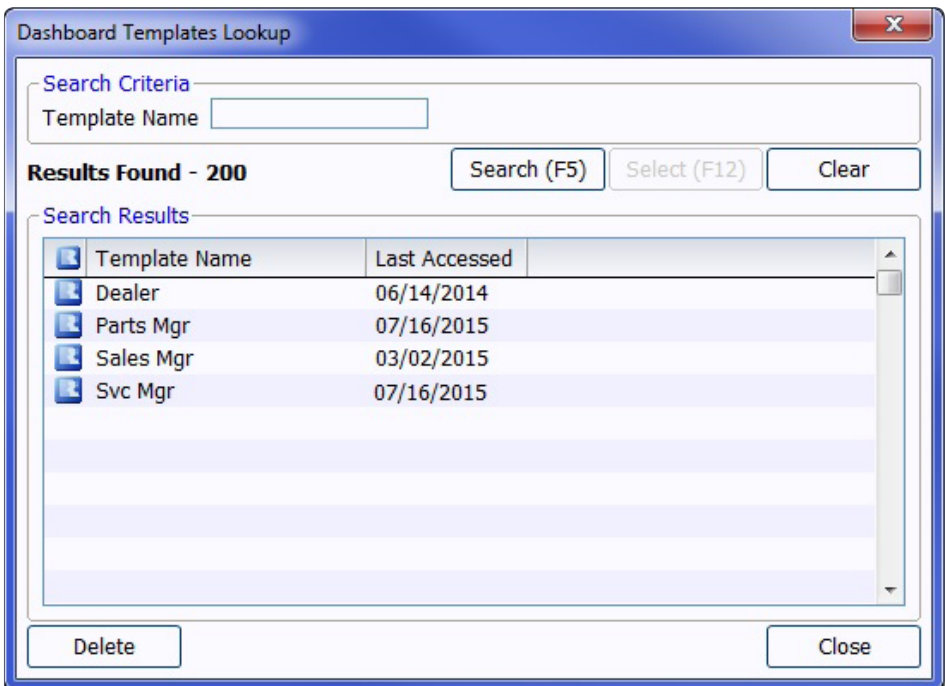
- 2. Select the module you want to add to your Dashboard. Some options contain visuals like a speedometer, thermometer, or a bar graph to make the data easier to digest.**



- 3. Specify the criteria for the module within the criteria window and click OK (F12).**

## Dashboard Templates

- If you don't know where to start with adding modules to your Dashboard, let us help. We've added templates that contain a variety of modules based on dealership role to get you started. Simply specify the criteria for each one. You can access these templates by selecting **Load Template (F7)** from the Dashboard view.



### 30 Day ERAccess to ERA-IGNITE Transition Plan

- **Week 1:** Begin taking Computer Assisted Instruction courses to become familiar with ERA-IGNITE applications and basic navigation.
- **Week 2:** Use ERAccess 90% of the time and ERA-IGNITE 10% of the time. Start to explore ERA-IGNITE during your off-peak hours and practice performing your daily tasks. Use this time to find out what you like and see how ERA-IGNITE can help you do your job better.
- **Week 3:** Use both ERAccess and ERA-IGNITE 50% of the time. By this point you should feel pretty confident about performing daily functions within ERA-IGNITE. Do not worry about how fast or slow you are getting things done. Speed will come with time and practice. Before you know it you will be faster in ERA-IGNITE than ERAccess!
- **Week 4:** Begin the week using ERA-IGNITE 90% of the time and ERAccess only 10%. The only reason you should return to ERAccess is if you are in a critical situation or you need to access a screen that is not yet available in ERA-IGNITE. If onsite training is purchased it should coincide with this week of the transition.

By the end of week 4, disable all user security in ERAccess executable 6210 to require users to adopt ERA-IGNITE. If onsite training has been purchased, complete this step while trainers are present to provide support. This is an important step to reinforce your commitment to utilizing ERA-IGNITE.

- **Quick Process Cards** are pocket-sized cards that show the fastest, most efficient way to get tasks done. Employees can keep them close to their PCs to guide them through new or complicated tasks.
- A set was included in your ERA-IGNITE Welcome Kit. To order more, please visit [www.ReySource.com](http://www.ReySource.com) or talk to your account manager.

## Parts Orders

### How to Add a Manual Parts Order

The Add Record - Part Order tab is used to manually create a parts order.

1. Press the CTRL+A hot key combination.  
The Add Record screen displays.
2. Select the Part Order tab.
3. Enter the make code for the parts to be added to the order in the MAKE field.  
**Will Be Assigned** displays to the right of the PO# field to indicate that an automatically assigned purchase order number can be used.
4. (Optional) Enter a purchase order number to assign to the parts order in the PO# field.
5. Press the TAB key and enter the date the order is to be placed in the ORDER DATE field.  
A date is automatically entered in this field; however, this entry can be changed.
6. Enter the date by which the order is required in the REQUIRE DATE field.  
A date is automatically entered in this field; however, this entry can be changed.
7. Enter the vendor number for the part order in the VENDOR# field.  
The name and address of the vendor displays to the right of the VENDOR# field.
8. Press the F12 key.  
A message window displays to determine whether a counterperson can be entered for special order parts.

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**Flip Over**

9. Press the ENTER key to allow counterperson numbers to be entered for special order parts.  
The Daily Order Entry - Line Items screen displays where parts can be added to the part order.

### How to Add Parts to an Order

Once a parts order is created, parts can be added to the order on the Daily Order Entry - Line Items screen.

1. Enter the number of the part to add to the order in the PART# field on the Daily Order Entry - Line Items screen.  
The cost price of the part is automatically entered in the COST field. In addition, detailed information about the part number displays in the unlabeled Details section.
2. Enter the quantity of the part to add to the order in the QUANTITY field.  
A quantity of 1 is automatically entered in this field; however, this entry can be changed.
3. Press the TAB key twice and enter the order type of the part in the OT field.
4. (Optional) For special orders, enter the customer name in the CUSTOMER NAME field and the counterperson number for the order in the CTR# field.
5. Repeat steps 1-4 to include additional parts on the order.
6. Press the F12 key to update the order.  
The parts are added to the order.

For additional assistance, contact the Reynolds and Reynolds  
Technical Assistance Center (TAG) at (800) 767-0080.



**Parts  
ERA-IGNITE**



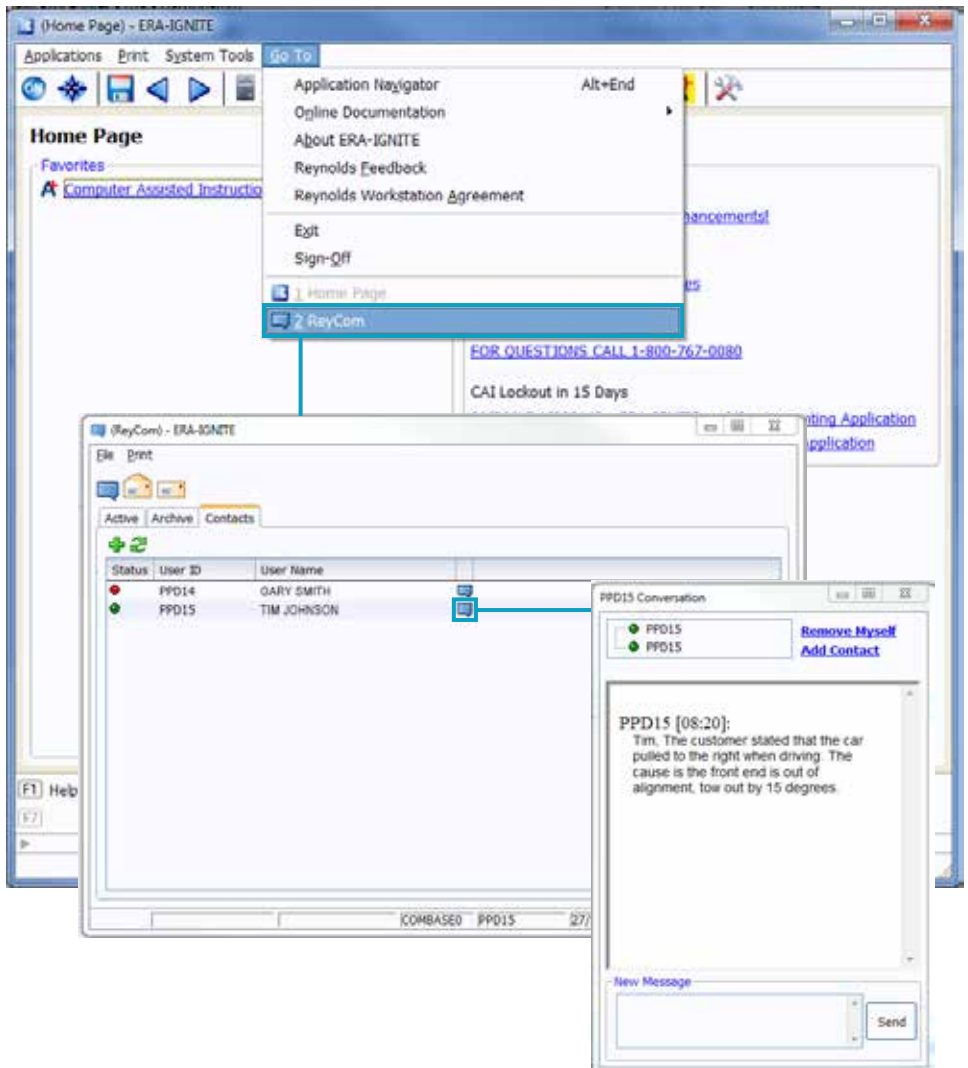
- Speed up navigation with the use of **Keyboard Shortcut Cards**. They list out commonly used hot keys and shortcuts and can be placed beside your monitor for easy access.
- A set was included in your ERA-IGNITE Welcome Kit. To order more, please visit [www.ReySource.com](http://www.ReySource.com) or talk to your account manager.

Hot Keys	Description
Alt+End	Access Application Navigator
Alt+(Underlined Letter)	Access drop-down menus at top of screen
Alt+Tab	Move through open windows
Ctrl+A	Add new record
Ctrl+S	Open new search screen
Ctrl+B	Browse backward
Ctrl+F	Browse forward
Ctrl+C	Copy highlighted text
Ctrl+X	Cut highlighted text
Ctrl+V	Paste text
Ctrl+Z	Undo current field
Ctrl+Enter	Move to next required field
Ctrl+Home	Highlight first item in list or first cell in table
Ctrl+Tab	Move forward through tabs on screen
Ctrl+Shift+Tab	Move backward through tabs on screen
Page Down	Move forward through subscreens
Page Up	Move backward through subscreens
Home	Move to first item in drop-down list
End	Move to last item in drop-down list
Esc	Close active subscreen window
Shift+Right Arrow	Expand current selection
Shift+Left Arrow	Collapse current selection
Tab	Move forward one field at a time
Shift+Tab	Move backward one field at a time
Spacebar	Toggle items on/off (radio button or checkbox)

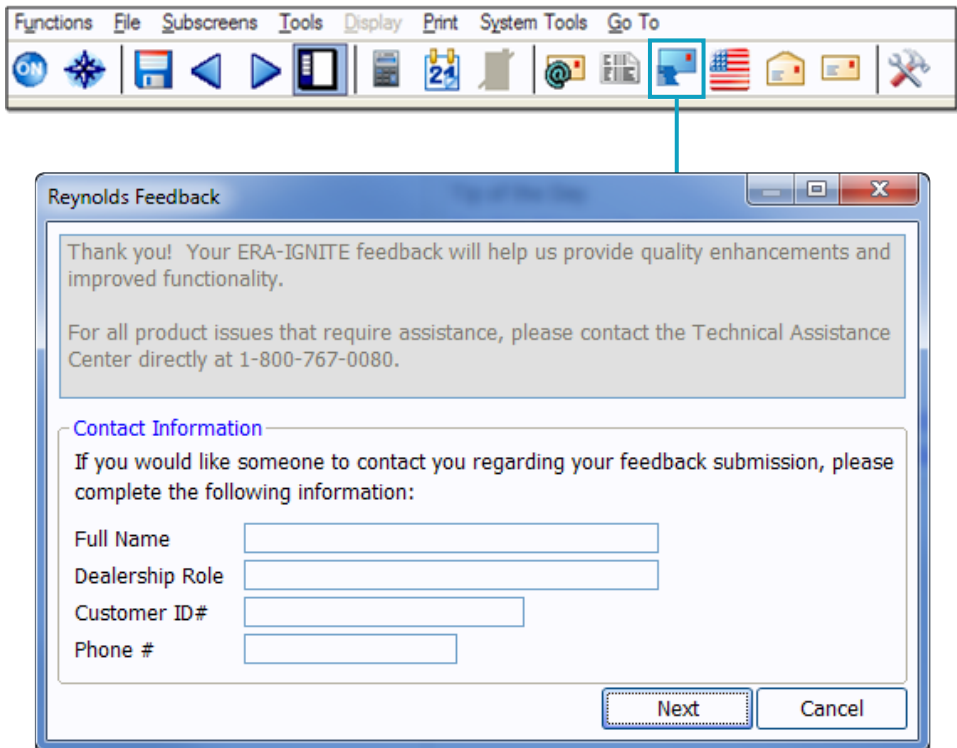
- Read about all the latest ERA-IGNITE enhancements with each release on [igniteinfo.reyrey.com](http://igniteinfo.reyrey.com).
- The website features:
  - Release highlights by department.
  - A list of upcoming training opportunities.
  - Application overviews and utilization tools.
- Bookmark and revisit the site periodically as it is updated on a regular basis with all the latest enhancements and training opportunities.



- Communicate with other departments within the dealership more quickly and efficiently with **ReyCom**, which can be accessed from the Go To menu from any ERA-IGNITE window.



- The **Feedback Button**, located at the top of every ERA-IGNITE window, allows you to send instant feedback to Reynolds. Have any suggestions? Simply fill out the feedback form and send it. Enhancements to ERA-IGNITE are a direct result of feedback from customers like you.



If you have any questions, you can reach us at:

- **Technical Assistance Center: 800.767.0080.**

Press **3** for **ERA-IGNITE Software**. Then:

**2 – Accounting**

**Payroll**

**Polk Cross Sell**

**ReyPAY®**

**Vehicle Management**

**3 – Fixed Operations**

**Dealer Communications**

**4 – F&I and docuPAD®**

**5 - Contact Management**

**6 – Retail Management Intelligence**

**Dynamic Reporting**

**Computer Assisted Instruction**

**7 – Intelligent Forms Printing**

**8 - Integrated Document Management**

**Electronic Document Management**

- **Online Support: [my.reyrey.com](http://my.reyrey.com).**

- **Company and Solutions Information: 800.767.7879.**



Retail  
Management  
System

