



Physical Inventory DMS Setup Manual

The Steps to Perform in Your DMS

Part of ScanIt Parts
Inventory Management System — pi.ipsdev.com

Innovative Programming Systems
Updated September 2026

Table of Contents

1. How PI Works With Your DMS

1.1 The Three Phases

1.2 What Each DMS Requires

1.3 How to Use This Manual

2. The Common ScanIt Parts Steps

2.1 Before the Count

2.2 Scanning the Count

2.3 Verify, Report, and Post

3. CDK

3.1 Before the Count

3.2 After the Count

4. DealerTrack

4.1 Before the Count

4.2 After the Count

5. AutoMate

5.1 Before the Count

5.2 After the Count

6. Dominion VUE

6.1 Before the Count

6.2 After the Count

7. Lightspeed and Talon

7.1 Before the Count

7.2 After the Count

Appendix: Glossary & Quick ID

1. How PI Works With Your DMS

This manual covers one thing: **the steps you perform inside your own DMS** for a physical inventory with ScanIt Parts. The shared ScanIt Parts steps (creating the inventory, scanning, and posting) are the same for every DMS and are covered once in Chapter 2. Each DMS chapter then covers only what is different on *your* system.

1.1 The Three Phases

Every physical inventory moves through three phases:

Phase	What Happens	Where
1. Before	The count list (the "pad") is prepared. On most systems you build a count pad in your DMS first. On Lightspeed you export a CSV from the DMS instead.	Your DMS, then ScanIt Parts
2. Count	Your team scans bins and parts. Scans sync to ScanIt Parts. You verify variances and run reports.	Scanners + ScanIt Parts
3. After	The final counts are transmitted back to your DMS from ScanIt Parts. You then enter your write-ins by hand and finalize inside your DMS.	ScanIt Parts, then your DMS

Write-ins are always a manual entry — on every DMS. A write-in is a part that was scanned during the count but is not in your DMS inventory. ScanIt Parts reports your write-ins, but it does **not** add them to your DMS for you. **After ScanIt Parts transmits the counts back to your DMS, someone must key each write-in into the DMS by hand** before the inventory is finalized. This is true for every DMS in this manual.

1.2 What Each DMS Requires

This table is the heart of the manual. It shows, at a glance, what your DMS needs from you in Phase 1 and Phase 3.

DMS	Before the count — build a pad in the DMS?	After the count — what you do in the DMS
-----	--	--

CDK	Yes. In CDK DRIVE, build the pad with INS (do not print sheets) and verify totals, then run PHP to zero counts after the pull. Part data moves via 3PA (one-time 3PA grant required).	Click Post Inventory in ScanIt Parts to transmit counts to CDK via 3PA; then manually enter write-ins in CDK; close the inventory to finalize.
DealerTrack	Yes. Build the pad under menu 13 – Physical Inventory .	Click Post Inventory in ScanIt Parts to transmit; then in DealerTrack manually enter write-ins (Option 1) and Post (Option 9) to finalize.
AutoMate	Yes. Build the pad under option 32 – Physical Inventory Sub-System .	Click Post Inventory in ScanIt Parts to transmit; then in AutoMate manually enter write-ins (Option 5) and post (Option 6) to finalize.
Dominion VUE	Yes. Build the pad under Parts ? Physical Inventory ? New .	Click Post Inventory in ScanIt Parts to transmit; then in Dominion VUE manually enter write-ins/cores and Update to finalize.
Lightspeed	No live link — CSV. Download a CSV from Lightspeed in the layout defined by ScanIt Parts, then import it into ScanIt Parts.	Click the button in ScanIt Parts to create a CSV, then import that CSV back into Lightspeed to finalize.
Talon	No live link — file exchange, the same as Lightspeed.	Choose ASC on the download and pick your part number width; import the .asc into Talon to finalize.

1.3 How to Use This Manual

Read Chapter 2 once so you know the common ScanIt Parts flow. Then jump straight to your DMS chapter (3–7). Each DMS chapter has just two short sections: **Before the Count** (what to do in your DMS to prepare) and **After the Count** (how to finalize in your DMS).

Need the full ScanIt Parts guide? For deep detail on the dashboard, employees, scanner rentals, verify mode, printing, and all reports, see the *Physical Inventory Platform Guide*. This manual stays focused on the DMS steps.

2. The Common ScanIt Parts Steps

These steps are the same no matter which DMS you run. Your DMS chapter tells you what to do *before* and *after* this common flow.

2.1 Before the Count

- 1 Add your scanner users. Go to [Employees ? Add Employee](#), enter the person's information and a scanner PIN of your choice, then **Submit**. Repeat for everyone who will scan.
- 2 Create the inventory. From the [Dashboard](#), select **Create Inventory**. Choose the **DMS** and the **dealership**, set the inventory date if it is not today, enter any DMS information requested, and **Submit**.
- 3 Pull the inventory. Open [Inventories](#), choose your location with [Actions > View](#), then select **Pull Inventory**. This loads the count pad into ScanIt Parts.
- 4 Set up each scanner. Select the three dots, choose **Switch to Physical Inventory**, run **Test Connection** (connect to Wi-Fi if needed), then enter the **Inventory Key** or scan the QR code from the website and log in with your email and PIN.

2.2 Scanning the Count

- 1 Scan or enter the bin location.
- 2 Scan every part in that bin. To count more than one, select **Set Quantity** after scanning the part.
- 3 Sync scanned parts about once an hour on every scanner. After syncing, log back in and keep scanning until everything is counted.

2.3 Verify, Report, and Post

- 1 Verify variances. Use **Variance Mode** on the scanner to re-scan parts that do not match, or adjust quantities on the **Pad** in ScanIt Parts (the green adjust button ? enter the corrected quantity ? Save).

2 Run reports. At a minimum, review **Pad Variance**, **Write-Ins**, **Bins Not Counted**, **Parts Not Counted**, and **Misplaced Parts**.

3 Post. Once scanning is complete, the **Pull Inventory** button changes to **Post Inventory**. Select it to send the final counts to your DMS.

Posting is the point of no return for the count. Finish verifying variances and reviewing your reports *before* you post. Your DMS chapter explains what (if anything) you still do in the DMS after posting — including **manually keying in any write-ins**.

3. CDK

For CDK you prepare the count in **CDK DRIVE** before the data is pulled, and you finalize in CDK after the count. The part data moves between CDK and ScanIt Parts automatically through **3PA (Third Party Access)** — but several CDK functions are run by hand: **INS** to build the count pad, **PH7** and **MGR** to verify your totals, **PHP** to open and zero the physical, and finally closing the inventory.

3.1 Before the Count

One-time setup: CDK requires a **3PA** grant before ScanIt Parts can connect. This is set up once per store, not for every inventory. If your inventory will not pull, the 3PA is the first thing to check with IPS support.

Step A — Build the count pad in CDK DRIVE

- 1 Run **INS** (Inventory Sheets) to build the count pad. **Do NOT print the count sheets** — you are counting with ScanIt Parts, not on paper.
- 2 Sort by **Bin, Part #**.
- 3 Run **PH7** (Inventory Value) and **MGR** (Management Report) for that INS.
- 4 Verify that the total values match.

If the totals do not match, your CDK files are corrupt. Call CDK and have them fix the files *before* you go any further. Do not start the physical inventory until the totals match.

Step B — Pull the inventory into ScanIt Parts

- 5 In ScanIt Parts, create the inventory and select **Pull Inventory** (Chapter 2). All of the data comes in through the 3PA process.

Step C — Zero the counts in CDK

- 6 Once all the data has loaded into the ScanIt Parts inventory, run **PHP** (Physical Preparation) in CDK to **zero all counts**. This opens the physical inventory and prepares CDK to receive the new on-hand quantities.

Now count using the ScanIt Parts tools and reports, as described in Chapter 2.

3.2 After the Count

- 1 In ScanIt Parts, verify variances and run your reports.
- 2 When the count is done, click **Post Inventory** in ScanIt Parts. This is the button that **transmits the counts back to CDK** through 3PA. Wait for the transmit to finish — all counts are now in CDK.
- 3 After the transmit completes, in CDK **manually enter any write-ins** (key them in by hand).
- 4 In CDK, finalize by **closing the inventory**.

CDK transmit note: CDK does not have the **Repost Errors** retry that other systems have in ScanIt Parts — there is nothing to re-post from your end. If the transmit back to CDK does not complete, it is almost always (about **99% of the time**) an error on CDK's side that CDK must resolve. Contact IPS support so it can be escalated to CDK.

4. DealerTrack

In DealerTrack you build the count pad under menu **13 – Physical Inventory** before pulling into ScanIt Parts. When the count is done you transmit it back from ScanIt Parts, then finish the write-ins and post in DealerTrack.

4.1 Before the Count

Build the count pad — menu 13

- 1 Select number **13 – Physical Inventory**.
- 2 Select **Add**.
- 3 Select the **Type of Inventory**.
- 4 Select **Bin Selection** and **OK**.
- 5 Select **Manufacturer**.
- 6 Enter the Manufacturer code, enter **From Bin** and **To Bin**, then **OK**.
Counting everything? Leave **From Bin** and **To Bin** blank to include all bins.
- 7 Fill out the remaining fields (leave defaults as shown on screen) and select **OK**.

DMS information for ScanIt Parts: When you create the inventory in ScanIt Parts, you will be asked for the DMS information. You will find this in the **bottom-right corner** when you log in to DealerTrack.

Now create the inventory and **Pull Inventory** in ScanIt Parts (Chapter 2), then scan the count.

4.2 After the Count

- 1 In ScanIt Parts, verify variances and run your reports.
- 2 Click **Post Inventory** in ScanIt Parts to **transmit the counts to DealerTrack**. Wait for the transmit to finish.
- 3 After the transmit completes, in DealerTrack select **Option 1 — Enter Count** to **manually enter** write-ins and cores (key them in by hand).
- 4 Select **Option 9 — Post** to finalize the inventory.

5. AutoMate

In AutoMate you build a Temporary Count List under option 32 before pulling into ScanIt Parts. When the count is done you transmit it back from ScanIt Parts, then finish the write-ins and post in AutoMate.

5.1 Before the Count

Build the count pad — option 32

- 1 Select option 32 – Physical Inventory Sub-System.
- 2 Select option 1 – Create Temporary Count List.
- 3 Select option 2 – Physical Inventory.
- 4 Fill out the count list as shown on screen, then select **ESC — Print Preview**.
- 5 Select the **X** to close the preview.

Now create the inventory and **Pull Inventory** in ScanIt Parts (Chapter 2), then scan the count.

5.2 After the Count

- 1 In ScanIt Parts, verify variances and run your reports.
- 2 Click **Post Inventory** in ScanIt Parts to **transmit the counts to AutoMate**. Wait for the transmit to finish.
- 3 After the transmit completes, in AutoMate select option 5 – Enter, Print, and Review Write-ins to **manually enter** your write-ins (key them in by hand), then select **ESC** to continue.
- 4 Select option 6 – Post Counts and Write-ins to Parts Inventory, then select **ESC** to Post Count Sheets and finalize the inventory.

6. Dominion VUE

In Dominion VUE you build the count pad before pulling into ScanIt Parts. When the count is done you transmit it back from ScanIt Parts, then enter your write-ins and finalize in Dominion VUE.

6.1 Before the Count

Build the count pad in Dominion VUE

- 1 Select **Parts**.
- 2 Select **Physical Inventory**.
- 3 Select **New**.
- 4 Set up the inventory. For a full inventory, select **Select All**, then **Save**.

Then create the inventory and **Pull Inventory** in ScanIt Parts (Chapter 2), and scan the count.

6.2 After the Count

- 1 In ScanIt Parts, verify variances and run your reports.
- 2 Click **Post Inventory** in ScanIt Parts to **transmit the counts to Dominion VUE**. Wait for the transmit to finish.
- 3 After the transmit completes, in Dominion VUE **manually enter** write-ins and cores (key them in by hand), then select **Update** to finalize the inventory.

7. Lightspeed and Talon

Lightspeed works differently from the other systems: it uses a **CSV file exchange** instead of a live connection. You export a CSV from Lightspeed and import it into ScanIt Parts to start; at the end ScanIt Parts builds a CSV that you import back into Lightspeed.

7.1 Before the Count

- 1 In Lightspeed, export your parts inventory to a **CSV file**. The columns must be in the exact order ScanIt Parts expects (see the layout below).
- 2 In ScanIt Parts, create the inventory and **upload the CSV file** on the import form to load the count pad (Chapter 2).
- 3 Scan everything, as described in Chapter 2.

Required CSV column order (import). This is the field list shown on the import form in ScanIt Parts. Your Lightspeed export must place its columns in exactly this order:

Column	Field
1	Part #
2	Description
3	Supplier
4	Qty
5	Cost
6	Bin

7.2 After the Count

- 1 In ScanIt Parts, verify variances and run your reports.

2 In ScanIt Parts, click **Download Scanned Data**. This builds a CSV file to send to Lightspeed, with two columns in this order: **Part #**, then **Scanned Qty**.

3 In Lightspeed, **import that CSV file** to bring the counts back in and finalize the inventory.

Only Part # and Qty are sent back. The file ScanIt Parts sends to Lightspeed contains just the **part number** and the **counted quantity**. **Bin locations are not updated in Lightspeed.** If you need bin changes reflected in Lightspeed, make them in Lightspeed yourself.

Talon

Talon stores count exactly the same way as Lightspeed stores — the same pad, the same scanning, the same screens. The only difference is the file you send back at the end: **Talon will not read the CSV**. It needs a fixed-width **.asc** file instead.

1 Count the inventory exactly as a Lightspeed store does (steps 1–2 above).

2 On the download panel, choose **ASC** instead of CSV.

3 Choose the **part number width** your Talon install uses — **18** (the default) or **17**.

4 Import the **.asc** file into Talon to finalize the inventory.

Why the width matters

The **.asc** file has no commas or tabs in it. Every field sits at a fixed position on the line, so the part number column has to be exactly the width Talon expects — if it is wrong, every field after it lines up wrong and Talon will not read the file correctly.

When you choose a width, ScanIt Parts reads your actual count at that width and tells you three things before you download anything:

- the **longest part number** in this inventory
- how many part numbers would be **cut short** at that width
- how many would **collide** — two different parts shortened to the same text

Never ignore a collision warning. When two part numbers shorten to the same text they merge into one line in the file. That posts a count against a part number that does not exist, and leaves a real part uncounted. If you see a collision warning, use the wider setting.

Not sure which width? Ask whoever administers your Talon system, or start at 18 and read the cut and collision numbers on screen. Your choice is saved against your dealership, so the next count starts from the same width.

Appendix: Glossary & Quick ID

Glossary

Term	Meaning
Count pad / pad	The list of parts and bins to be counted. On most systems you build it in your DMS; ScanIt Parts then pulls it in.
Pull Inventory	The ScanIt Parts action that loads the count pad from your DMS into ScanIt Parts.
Post Inventory	The ScanIt Parts action that sends the final counts back to your DMS. The Pull Inventory button becomes Post Inventory once scanning begins.
3PA	Third Party Access. CDK requires this one-time grant before ScanIt Parts can connect. Part data is pulled and transmitted back between CDK and ScanIt Parts through 3PA.
INS (CDK)	Inventory Sheets. The CDK DRIVE function that builds the physical-inventory count pad.
PH7 / MGR (CDK)	Inventory Value report (PH7) and Management Report (MGR). Run to verify the inventory totals before counting.
PHP (CDK)	Physical Preparation. Opens the physical inventory and zeros the counts so CDK can receive the new on-hand quantities.
Write-in	A part scanned during the count that was not in the DMS inventory. ScanIt Parts reports write-ins, but it never adds them to the DMS — they must be keyed into the DMS by hand before the inventory is finalized.
Variance	A difference between the DMS quantity and the scanned quantity. Verify variances before posting.
Inventory Key	The code (or QR code) used to point a scanner at the correct inventory.

Which DMS am I on?

DMS	How to tell
CDK	You prepare the pad in CDK DRIVE (INS); part data moves via 3PA; you close the inventory in CDK to finalize.

DealerTrack	Menu-driven (13 – Physical Inventory); DMS info is shown in the bottom-right after login.
AutoMate	Numbered options (32 sub-system); you create a Temporary Count List.
Dominion VUE	You build the pad under Parts ? Physical Inventory ? New ; counts transmit back from ScanIt Parts; you Update to finalize.
Lightspeed	CSV exchange: download a CSV from Lightspeed to start, import a ScanIt Parts CSV back at the end. No live link.
Talon	Counts like Lightspeed, but the file back is a fixed-width .asc , not a CSV. Pick the part number width (18 or 17) on the download.

Stuck or unsure? Contact IPS support — especially if an inventory will not pull (often a DMS access issue) or a post does not complete.