

*Autosoft*  
**FLEX**<sup>TM</sup>  
*DMS*  
*F&I*

 *Autosoft*  
*Dealer Management System*  
**YOU DRIVE.**<sup>TM</sup>

## **Copyright**

© 2012-2014 Autosoft, Inc. All rights reserved.

The information in this document is subject to change without notice. No part of this document may be reproduced, stored in a retrieval system, or transmitted in any form or by any means electronic or mechanically, including photocopying, for any purpose other than the purchaser's personal use without written permission from Autosoft, Inc.

The software described in this document is provided under a license agreement or nondisclosure agreement between Autosoft, Inc. and the purchaser. The software may only be used and copied in accordance with the terms of that agreement.

Autosoft, Inc.  
61 Executive Court  
West Middlesex, PA 16159  
U.S.A.

[www.Autosoft-asi.com](http://www.Autosoft-asi.com)

## **Trademarks**

Autosoft is either a registered trademark or trademark of Autosoft, Inc. All vehicle makes and models mentioned in this manual are trademarks or registered trademarks of the respective automotive manufacturer and should be noted as such. Any other products mentioned in this document are trademarks or registered trademarks of their respective holders and should be noted as such.

# Table of Contents

<b>Introduction to Autosoft Finance</b> .....	<b>1</b>
Logging on to the Program .....	1
Logging on for the First Time .....	1
Resetting Passwords.....	2
Locking Accounts .....	3
Working with Lists .....	3
Using Links.....	4
Understanding Messages .....	4
Closing the Program .....	4
Getting Ready .....	4
<b>Chapter 1 System Setup</b> .....	<b>5</b>
Accessing the Setup .....	5
Adding Dealership Setup Information .....	6
Dealership Info .....	6
Stores .....	7
Adding Stores.....	7
Making a Store Inactive .....	7
Employees.....	8
Adding an employee .....	8
Viewing Employee Information .....	12
Editing Employee Information.....	12
Making a User Inactive .....	12
Disabling Employees .....	13
Restoring Employees.....	13
Locking Accounts.....	13
Unlocking Accounts .....	14
Understanding the Account Status .....	14
Integrations.....	14
Adding Sales Information.....	14
Sources .....	15
Adding Sources .....	15
Removing Sources .....	15
Lost Reasons .....	16
Adding Lost Reasons.....	16
Removing Lost Reasons .....	16
Adding Finance Setup Information .....	17
Finance Info.....	17
Banks.....	19
Adding Banks.....	20
Adding a Lien Holder or Loss Payee .....	21
Removing a Bank .....	22
Trade Lien Holder.....	22
Adding a Trade Lien Holder.....	23

Removing Trade Lien Holders .....	23
Taxes & Fees.....	24
Adding States .....	24
Removing a State.....	26
Insurance Companies.....	27
Adding Insurance Companies.....	27
Removing an Insurance Company.....	27
Adding Insurance Agents .....	28
Removing an Agent.....	28
Front Adds .....	29
Adding a New Item .....	29
Removing Items .....	30
Back Adds.....	30
Adding a New Item .....	31
Removing Items .....	31
Coverage Provides .....	32
Adding Providers.....	32
Removing Providers.....	33
Adding Plans .....	33
Removing Plans .....	34
Life A&H.....	35
Adding a new Provider .....	35
Removing Providers.....	37
Commissioning .....	37
Finishing up .....	38
<b>Chapter 2 Customers .....</b>	<b>39</b>
Customers vs. Ups .....	39
Individuals vs. Organizations.....	39
Searching for Customers.....	40
Adding an Individual .....	41
Adding Credit Information .....	42
Adding License Information .....	44
Adding an Organization .....	44
Adding Representatives to an Organization .....	46
Editing Customer Information.....	48
Adding Notes .....	48
Viewing Notes .....	49
Viewing Deals.....	50
<b>Chapter 3 Inventory .....</b>	<b>51</b>
Filtering the Inventory List .....	52
Searching Inventory.....	53
Adding a Vehicle.....	54
Creating a Desk for a Vehicle.....	57
Generating Inventory Reports .....	58

<b>Chapter 4 Deals</b> .....	<b>59</b>
Using the Deals List .....	60
Creating a New Deal for a New Up.....	61
Creating a New Deal for an Existing Customer .....	63
Adding a Co-Applicant .....	64
Removing a Co-Applicant.....	65
Swapping the Applicant and Co-Applicant .....	65
Editing Customer Information .....	65
Changing a Customer .....	65
Adding Vehicle Insurance .....	66
Adding a Vehicle to the Deal.....	67
Adding a Vehicle using the Vehicle Screen .....	68
Removing a Vehicle from a Deal.....	69
Adding a Trade to the Deal .....	70
Removing a Trade .....	71
Viewing Activities .....	71
Adding Notes .....	72
Printing Up Forms .....	72
Viewing Information .....	73
Desking the Deal.....	73
Understanding the Basic Process .....	74
Front End.....	78
Taxes.....	79
Fees.....	81
Back Adds .....	82
Coverage .....	83
Life A&H .....	84
Inception .....	85
Mileage .....	86
Rolling.....	86
Rolling a Balloon or Retail Deal.....	86
Rolling a Lease Deal.....	87
Rolling a Cash Deal .....	88
Integrations.....	89
Printing Deal Forms.....	89
Viewing the Recap .....	89
Finalizing the Deal .....	90
Viewing the Gross .....	90
Viewing Commission .....	91
Adding another Employee .....	92
Removing an Employee .....	92
Marking a Lost Sale .....	93
Reactivating a Lost Sale .....	94
Desking a Deal without Adding a Customer .....	95

Viewing Multiple Deals .....	95
Understanding Deal Status .....	96
<b>Chapter 5 The Dashboard .....</b>	<b>97</b>
Home .....	97
Prospect Summary .....	98
Sales Summary .....	99
Salesperson Ranking .....	100
Source Ranking .....	101
Lost Sale Summary .....	102
Dashboard Reports .....	102
<b>Chapter 6 Reporting.....</b>	<b>103</b>
Generating Reports .....	103
<b>Conclusion.....</b>	<b>105</b>
<b>Appendix A My Account.....</b>	<b>107</b>
Accessing My Account .....	107
Managing Information.....	108
Managing Account Information.....	109
Changing Your Password .....	109
Viewing Integration Information.....	110
<b>Appendix B Editing Frozen Deals .....</b>	<b>111</b>
<b>Appendix C Deleting Deals .....</b>	<b>113</b>
Deleting a Deal .....	113
Reviewing Deleted Deals .....	114
Restoring a Deal .....	115
Permanently Deleting Deals .....	116
Viewing the Deleted Deals Report .....	116
<b>Appendix D Driver’s License Scanner .....</b>	<b>117</b>
Installing Your Scanner .....	117
Using the Scanner to add a new Customer.....	117
Scanning a Customer’s License .....	119
Printing the Driver’s License.....	121
Deleting the Driver’s License Images.....	121
Using the Scanner to add a new Customer to a Deal .....	122
<b>Appendix E Menu Selling .....</b>	<b>123</b>
Setting up Menu Selling.....	123
Adding Disclosures .....	124
Creating Templates.....	125
Adding a new Template .....	125
Removing Templates .....	126
Using Menu Selling.....	127
Working Menu Selling.....	127
Printing the Acceptance Form for a Frozen Deal .....	133
<b>Appendix F Credco .....</b>	<b>135</b>
Credco Integration Setup .....	135

---

Requesting Credit Reports.....	136
<b>Appendix G CUDL.....</b>	<b>137</b>
CUDL Integration Setup.....	137
Submitting a Deal Information.....	138
Reviewing the CUDL Transaction Log.....	139
<b>Appendix H DealerTrack.....</b>	<b>141</b>
DealerTrack Integration Setup.....	141
Submitting a Deal Information.....	141
Reviewing the DealerTrack Transaction Log.....	143
<b>Appendix I RouteOne.....</b>	<b>145</b>
DealerTrack Integration Setup.....	145
Employee Setup.....	146
Submitting a Deal Information.....	147
Using the Single Sign on.....	148
Reviewing the RouteOne Transaction Log.....	149
<b>Appendix J TriVIN.....</b>	<b>151</b>
TriVIN Integration Setup.....	151
Generating the XML Files.....	151



# Introduction to Autosoft Finance

Welcome to the Autosoft Flex DMS Finance, a Windows-based program that fully integrates with Autosoft Dealership Management Systems. The program assists you with all the tasks the Sales and F&I Departments complete when making a sale, from tracking prospects and desking the deal to performing follow-up activities and generating reports.

The user-friendly design makes it easy to learn and use the program. The data screens consist of entry boxes that identify the information you need to enter, and default information entered during the initial setup automatically fills in the appropriate boxes throughout the program. This saves you the trouble of having to repeatedly enter standard information.

The program is also very versatile because you can enter any type of deal—cash, retail, lease, or wholesale. The program can accommodate the information you need to add to complete a deal, from the bank contracts to the rebates. In addition, the program automatically calculates commission based on the criteria you specify. With the Autosoft Finance, making sales is fast, efficient, and easy.

## Logging on to the Program

The first thing you will do each day is log on to the program. To ensure the security of your data, all users are required to log on to the program. You create user names and passwords for each employee you add in the program setup. This ensures that only the people you want to access the Autosoft Finance can open the program. You also assign access privileges in the setup, so the username and password used to log onto the program determines what the user can access.

### Logging on for the First Time

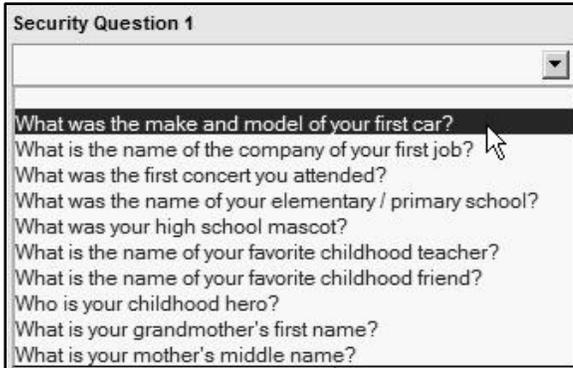
1. Double-click the **Finance** icon on your desktop.
2. The Autosoft Login screen opens.



	Username	Password	Company ID	<a href="#">Forgot Password</a>
	<input type="text"/>	<input type="password"/>	<input type="text"/>	<input type="button" value="Login"/>

3. In **Username**, type your assigned user name
4. In **Password**, type your assigned password. The password *is* case sensitive.
5. Type the company name in **Company ID**.
6. Click **Login**. The program opens.

7. You are prompted to select security questions. Use the **Security Question** lists to select the desired security question, and use the **Answer** fields to type the answer to your selected security questions.



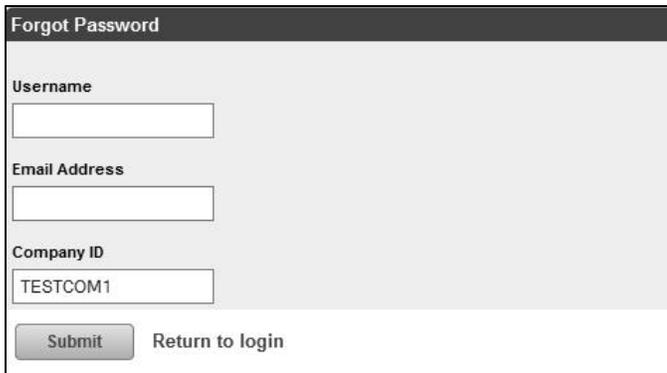
The screenshot shows a window titled "Security Question 1" with a dropdown menu. The menu is open, displaying a list of security questions. A mouse cursor is pointing to the first question, "What was the make and model of your first car?". The other questions listed are: "What is the name of the company of your first job?", "What was the first concert you attended?", "What was the name of your elementary / primary school?", "What was your high school mascot?", "What is the name of your favorite childhood teacher?", "What is the name of your favorite childhood friend?", "Who is your childhood hero?", "What is your grandmother's first name?", and "What is your mother's middle name?".

8. Next, type your e-mail address.
9. Click **Save**.
10. The Finance program opens.

## Resetting Passwords

You can choose to reset your password in the event you forget it. When you request to reset your password, Autosoft will send you a link you can use to reset the password in an e-mail message. The link is good for one hour from the time it was requested. If you receive a reset link in an e-mail message that you did not request, contact Autosoft immediately.

1. Click the **Reset Password** under the log on fields.
2. Type your user name and your e-mail address. This should be the e-mail address entered in your Employee record in the Finance program.



The screenshot shows a form titled "Forgot Password". It contains three input fields: "Username", "Email Address", and "Company ID". The "Company ID" field contains the text "TESTCOM1". At the bottom of the form, there is a "Submit" button and a "Return to login" link.

3. Click **Submit**.
4. You will receive an e-mail message with a link to reset your password. Click the link, and follow the instructions on the screen.

**Tip:** The dealership's administrator sets the number of days that your password will be active. The system will begin prompting you to change your password five days before it is set to expire. You cannot repeat any of the previous five passwords.

## Locking Accounts

The program automatically locks accounts if the account is not accessed within five days of creation. This is a safety feature. Administrators can unlock the accounts as needed.

After three failed log on attempts, the program also locks your account. You will need to contact your supervisor to unlock the account. At this point, only a supervisor can give you access to your account.

Username	Password	Company ID	<a href="#">Forgot Password</a>
<input type="text"/>	<input type="password"/>	TESTCOM1	Login
 Your account is locked. Please contact your system administrator			

## Working with Lists

Every list in the program allows you to control how the information displays. The top row of every list displays column headers that identify the information being displayed. You can click these headers to sort the list as needed. Clicking the header once sorts the information in ascending order (numerically from zero up or alphabetically from A to Z depending on the information displayed). Clicking the header a second time sorts the column in descending order (from the largest number to zero or from Z to A depending on the information displayed).

Sources
Source Name ▲
GM OneSource
Mailer
Previous Customer
Reach
Referral

Sources
Source Name ▼
Referral
Reach
Previous Customer
Mailer
GM OneSource

The bottom the list screen identifies the total number of pages. Click the arrows to advance through the pages to view information.

By default, each list will display the first five entries. You can use the drop-down option to select to view ten or 20 records at a time.



## Using Links

Autosoft Finance can be used on desktop computers as well as portable devices. To accommodate the functionality of portable devices, links have been added throughout the program. The links allow you to select the option with a single click or by tapping the link.

## Understanding Messages

The program has been designed to communicate with the user to ensure all data entered in the program is valid. As you work and enter information, the program will display error messages if required information is missing on a screen. These validation errors ensure the integrity of the data you enter. You cannot save the information entered on a screen without entering the required data. In addition to listing the required information in an error message, the required fields will display in red.

The program also checks to verify you have saved changes to information on a screen. If you edit data and attempt to navigate away from the screen, the program will warn you that you have unsaved changes on the current screen. You can choose to cancel so you can return to the screen and save the changes, or you can choose to continue to navigate away from the current screen without saving the changes.

## Closing the Program

When you are finished working, you will use the **Logout** link at the top of the screen to log out and close the program. The program has a timeout feature that will return you to the Autosoft Login screen, so if you will be away from the computer, you should log out of the program.

## Getting Ready

Now that you know how to use log on to the program and use some of the basic features, you are ready to begin using the Autosoft Finance. Each of the chapters in this manual discusses a specific feature. Make sure you read the corresponding chapter in the manual before attempting to use a feature.

# Chapter 1 System Setup

When you create deals, you have to type standard information repeatedly. Continually entering the same information takes time and leaves you vulnerable to entry errors. It is crucial to both F&I and the Sales Department that information is entered accurately and in the most efficient manner. The Autosoft Finance program makes it easy to ensure this accuracy and efficiency.

Before you begin using the program, you must enter setup information. This information customizes the program for your dealership and determines several pieces of default information (charges, tax information, commission information, etc.) that fill in automatically when you create a new deal. These default settings save you the time of having to enter standard information for each deal and ensure that the information is always correct.

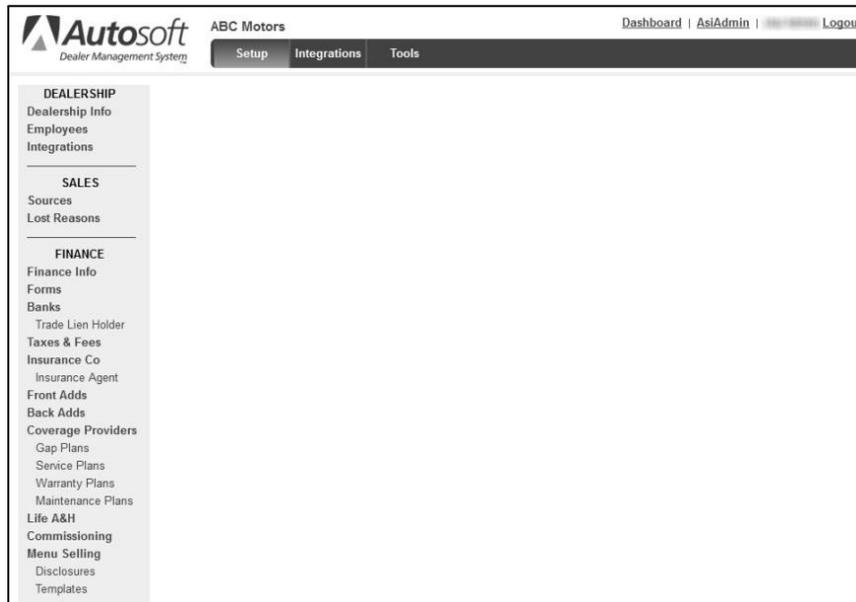
You can edit the setup information as needed to accommodate changes within your dealership. For example, you define commission percentages within the setup. When these percentages are increased or decreased, you would edit the default values so you do not have to adjust the commission calculation for each deal.

## Accessing the Setup

1. Click the **Admin** link at the top of the screen.



2. The Setup menu appears.



## Adding Dealership Setup Information

The **Dealership** section is where you will enter basic dealership information. The dealership information consists of the address and phone numbers for the dealership. You will also use this section to add employees to the program and select your dealership's integrations.

### Dealership Info

The Dealership Info is where you will add the address and telephone numbers for the dealership.

The screenshot shows a web form with the following fields and values:

- Information** / **Stores** (Tabs)
- Contact Information**
  - Dealership Name: ABC Motors
  - AS#: [Redacted]
  - Time Zone: Eastern
- Password Timeout (Days)**: 90
- Address**: 61 Executive Court
- City**: West Middlesex
- County**: Mercer
- State**: PA
- ZIP**: 16159
- Work**: 800 - 473 - 4630
- Fax**: 724 - 528 - 8495
- Account Number**: [Empty list with a green + icon]
- Save** button

1. Click **Dealership Info**.
2. The information in the Contact Information section is for reference only. You cannot edit this information. This information was added by Autosoft. If the information needs to be corrected, you must contact Autosoft.
3. Under **Account Number**, you can add the various account numbers for your dealership. Click the green **+** to add an account number.
4. Use the **Name** list to select the account number you are adding: **Business License**, **Dealer number**, **RRMC**, **Sales Tax**, and **Zone**.
5. Type the account number in the **Value** field.
6. Click the red **x** to remove an account number.
7. When you are finished adding dealership information, click **Save**. You will see a green "Success" message verifying the information has been saved.

## Stores

The Stores tab allows you to create the stores/locations associated with the dealership. Autosoft will create a store based on your dealership's account, but you can use this feature to add the various locations needed for printing forms. You can select the corresponding store for a sale when you create the desk to ensure the proper information will print on the forms.

Name	Address	City	State	Zip	Status	Default
ABC Motors Store1	61 Executive Court	West Middlesex	PA	16159	Active	☑

Include Inactive

**Store Information**

Name:

Address:  City:  County:  State:  ZIP:

Work:  -  -  Fax:  -  -

### Adding Stores

1. Click **Add New**.
2. Type the Name, Address, and Phone numbers for the store you are adding.
3. The store will appear in the Stores list. By default, the store added by Autosoft is the default store. Click the **Default** next to the store you want to set as the default store.
8. Click Save. You will see a green "Success" message verifying the information has been saved.

### Making a Store Inactive

Flagging a store as inactive removes it from the stores list. The store will only display if you select to include inactive stores by clicking the **Include Inactive** box when viewing the list.

1. Select the store.
2. Click to clear the **Active** field.



3. Click **Save** to save the information. You will see a green "Success" message verifying the information has been saved.

## Employees

The Employees setup is where you will add users. Every employee who needs to use the Finance program must be added to the setup. This is also where you will create the username and password each user will use to log on to the program. You also control access rights here.

Employees					
Last Name	First Name	Title	Employee Number	Status	Account Status
Harmer	Justin	Sales Manager	14	Active	Locked
Harvey	Andrea	Sales Person	9	Active	Unlocked
John	Sean	Finance Manager	1	Active	Unlocked
Novotniak	Dale	General Manager	17	Active	Unlocked
Perrotta	Ivano	Sales Person	10	Active	Locked

View 11 - 15 of 21

Include Inactive Add New

### Adding an employee

1. Click **Employees** on the left side of the screen.
2. Click **Add New**.
3. Under **Basic Information**, type the employee's name and pertinent information. Only the **First Name** and **Last Name** are required.

Information | Setup | Integrations | Account | Roles & Permissions

**Basic Information**

Prefix	First Name	Middle Name	Last Name	Suffix
<input type="text"/>				
Gender	License Number	Date of Birth	Marital Status	SSN
<input type="text"/>				

Active

**Address Information**

+

**Phone Numbers**

**Email Addresses**

+

+

Save

4. Under **Address Information**, click the green **+** to add an address. Type the address, and use the **Type** list to select the address type. You can add two addresses for the employee: a physical address and a mailing address. The address is optional, but if you select to add address information for the bank, the **State** field is required.

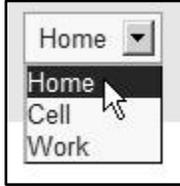
**Type**

Physical

Physical

Mailing

- To add phone numbers, click the green **+**, and enter the phone numbers. The **Type** defaults to Home. Select a different option as needed. You can add three phone numbers for the employee: home, cell, and work. Click the green **+** to add additional phone numbers as needed.



- To add an e-mail address, click the green **+**, and enter the address. The **Type** defaults to Home. Select a different option as needed. You can add two e-mail addresses for the employee: home and work. Click the green **+** to add an additional e-mail address as needed.
- Click **Save**. You will see a green “Success” message verifying the information has been saved.
- Click the **Setup** tab.

Information	Setup	Integrations	Account	Roles & Permissions
<b>Setup</b>				
Employee Number				
Title				
Salesperson				
Default Store				
<b>Commissioning</b>				
<input type="checkbox"/> Front End 0.00 %				
Front Flat 0.00				
<input type="checkbox"/> Back End 0.00 %				
Back Flat 0.00				
<input type="checkbox"/> Reserve End 0.00 %				
Reserve Flat 0.00				
Save				

- Under **Setup** on this tab, type the employee’s employee number, and use the **Title** list to select the employee’s job title.
- Under **Commissioning**, type the employee’s commission information. You only need to add commission information here if it varies for this employee. Otherwise, the program will use the universal commissioning information you enter under the Commissioning setup.

If the employee gets paid commission on front end, back end, or reserve, click to select the corresponding box. A checkmark displays in the box to indicate it is selected. A blank box means the employee does not get paid commission on this item.

Use the **End** fields to specify the commission percentage the employee gets. Specify the flat commission amount in the **Flat** fields. The program uses the option that pays the higher commission when applying commission.

11. Click **Save**. You will see a green “Success” message verifying the information has been saved.
12. Click the **Account** tab.

The screenshot shows the 'Account Information' form within the 'Account' tab. The form includes the following fields and sections:

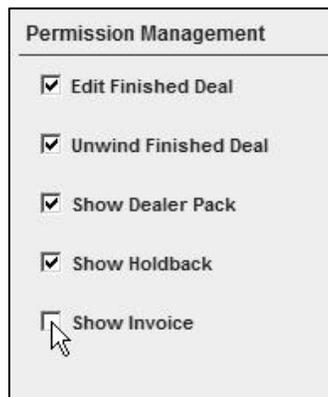
- Information** | **Setup** | **Integrations** | **Account** | **Roles & Permissions**
- Account Information**
- Login Name**:
- Password**:
- Retype Password**:
- Personal Email**:
- Password strength:**
  - Case sensitive
  - At least 8 characters
  - At least one number
  - At least one capital letter
  - Cannot equal previous password
  - Cannot be the user id
  - Cannot be the first or last name
- Save** button

13. Under **Account Information**, type the login name and password for this employee. The employee will use this information to log on to the program. Note that the password must meet the criteria listed.
14. Type an e-mail address.
15. Click **Save**. You will see a green “Success” message verifying the information has been saved.
16. Click **Roles & Permissions**.

The screenshot shows the 'Roles & Permissions' form within the 'Account' tab. The form includes the following sections and options:

- Information** | **Setup** | **Integrations** | **Account** | **Roles & Permissions**
- Role Management**
  - Dealer Principal
  - Finance Admin
  - Finance Restricted
  - Sales Admin
  - Sales Desking
  - Sales Restricted
- Permission Management**
  - Edit Finished Deal
  - Unwind Finished Deal
  - Show Dealer Pack
  - Show Holdback
  - Show Invoice
- Save** button

17. Under **Role Management**, click to select the role that identifies the access level for this employee. This determines what the employee can access in the program.
- **Dealer Principal:** This grants full access to the program.
  - **Finance Admin:** This grants full access to the program.
  - **Finance Restricted:** This grants full access to all sales and finance information in deals but restricts access to setup.
  - **Sales Admin:** This grants access to all sales information but restricts access to finance.
  - **Sales Desking:** This grants access to both the basic sales information and the Desking screen.
  - **Sales Restricted:** This grants access to basic sales information.
18. The **Permission Management** section allows you to give users access to additional items. A checkmark indicates the permission is set for the role. An empty box means the permission is not set. Click to select or to clear the box as needed.



Permission Management	
<input checked="" type="checkbox"/>	Edit Finished Deal
<input checked="" type="checkbox"/>	Unwind Finished Deal
<input checked="" type="checkbox"/>	Show Dealer Pack
<input checked="" type="checkbox"/>	Show Holdback
<input type="checkbox"/>	Show Invoice

19. Click **Save**. You will see a green “Success” message verifying the information has been saved.

**Tip:** Once you have entered account information for the employee, you can use the **Integrations** tab to add log on information for the integrations available for your dealership. Refer to the corresponding appendices at the end of this manual or the supplemental manufacturer integration documentation available from Autosoft for information on how to set up your dealership’s integrations.

## Viewing Employee Information

1. Click **Employees**. A list of employees added to the program displays at the top of the screen.
2. Click an employee in the list. The employee's information displays at the bottom of the screen.
3. Click the tabs as needed to view information.

## Editing Employee Information

1. Select the employee.
2. Edit the information as needed.
3. To remove an address, phone number, or e-mail address, click the red **X** next to the item.
4. Click **Save** to save the information. You will see a green "Success" message verifying the information has been saved.

## Making a User Inactive

Flagging an employee as inactive removes the employee from the employee list. The employee will only display if you select to include inactive employees by clicking the **Include Inactive** box when viewing the list. The employee will not be able to log into the program.

4. Select the employee.
5. Click to clear the **Active** field.



6. Click **Save** to save the information. You will see a green "Success" message verifying the information has been saved.

## Disabling Employees

Only users with administrative rights can disable users. The employee remains in the Employee list but will have an Account Status of Disabled. An employee with a disabled account will still display in employee lists throughout the program, but the user will not be able to log into the program.

1. Select the employee.
2. Click the **Account** tab.
3. Click **Disable User**.



4. Click **OK** when prompted to verify you want to disable the user.

## Restoring Employees

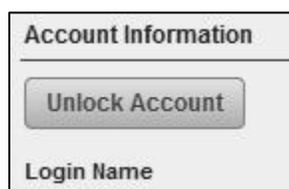
Only users with administrative rights can restore users. This returns the employee's account to an Enabled status, and the employee can log into the program.

5. Select the employee.
6. Click the **Account** tab.
7. Click **Restore User**.

## Locking Accounts

Locking an account prevents a user from logging on to the program. Only users with administrative rights can lock accounts.

1. Select the employee.
2. Click the **Account** tab.
3. Click **Lock Account**.
7. The **Lock Account** button becomes an **Unlock Account** button. You will also see a green "Success" message verifying the action was successful.



## Unlocking Accounts

If you lock an account, you must unlock it before the user can log on to the program. In the event an account is locked due to inactivity or three unsuccessful attempts at logging on to the program, you will also need to unlock the account.

1. Select the employee.
2. Click the **Account** tab.
3. Click **Unlock Account**.
4. The **Unlock Account** button becomes a **Lock Account** button. You will also see a green "Success" message verifying the action was successful.

## Understanding the Account Status

The **Account Status** column displays the account status. This simply identifies which accounts are locked (due to log on errors, inactivity, or manual locking), unlocked, enabled, and disabled.

Employees					
Last Name	First Name	Title	Employee Number	Status	Account Status
Harmer	Jason	Sales Manager	13	Active	Enabled
Harvey	Andrea	Salesperson	9	Active	Enabled
John	Sean	Finance Manager	1	Active	Locked
Novotniak	Dale	General Manager	17	Active	Enabled
Perrotta	Ivano	Salesperson	10	Active	Disabled

View 11 - 15 of 21

Include Inactive [Add New](#)

## Integrations

The integrations is where you specify the integrations your dealership uses. These are integrations with Autosoft DMS, credit bureaus, manufacturer interfaces, etc. Because different integrations require different information, refer to the corresponding appendices at the end of this manual or the supplemental manufacturer integration documentation available from Autosoft for information on how to set up your dealership's integrations.

## Adding Sales Information

You will add source and lost reasons using the Sales section. This is information required when starting a deal or closing a deal without completing a sale. This information is used to track traffic and sales.

## Sources

Sources allow you track how customers heard about your dealership. Each source is categorized by type to help you organize your sources. For example, source types consist of TV, Print, Internet, and so on. Within the TV type, sources would include television stations with which you have purchased advertising. Creating these codes is extremely important for tracking the effectiveness of your various advertising methods

Source Name	Source Type	Status
GM OneSource	Internet	Active
Mailer	Mailing	Active
Previous Customer	Other	Active
Referral	Other	Active
Service Customer	Other	Active

Page 1 of 2 View 1 - 5 of 6

Include Inactive

Deal Source:  Type:   Active

## Adding Sources

1. Click **Sources** on the left side of the screen.
2. Click **Add New**.
3. In **Source**, type the name/description of the source.
4. Use the **Type** list to select the source type: Internet, Mailing, Other, Phone, Print, Radio, or TV.
5. The **Active** field is automatically selected. You should leave this setting for new sources.
6. Click **Save** to save the information. You will see a green "Success" message verifying the information has been saved.

## Removing Sources

You cannot delete sources once you create them. Your only option is to flag the source as inactive so it no longer appears in the source list when selecting sources for customers. The source will also not display in the Source list in the setup unless you select to include inactive items by clicking the **Include Inactive** box when viewing the list.

1. Click **Sources** on the left side of the screen.
2. Click the source in the source list.
3. Click to clear the **Active** field.
4. Click **Save** to save the information. You will see a green "Success" message verifying the information has been saved.

## Lost Reasons

This area of the setup allows you to create codes that indicate why the dealership lost a sale. This serves as a valuable tracking tool that allows you to analyze your sales team's performance and identify areas where improvements can be made.

Lost Reason	Status
Bad Credit	Active
Bought Elsewhere	Active
More for Trade	Active
No Match	Active
Not Enough Cash Down	Active

Page 1 of 2 View 1 - 5 of 6

Include Inactive Add New

Lost Reason: Bought Elsewhere  Active Save

## Adding Lost Reasons

1. Click **Lost Reasons** on the left side of the screen.
2. Click **Add New**.
3. In **Lost Reason**, type the description that identifies why this was a lost sale.
4. The **Active** field is automatically selected. You should leave this setting for new entries.
5. Click **Save** to save the information. You will see a green "Success" message verifying the information has been saved.

## Removing Lost Reasons

You cannot delete Lost Reason codes once you create them. Your only option is to flag the code as inactive so it no longer appears in the lost reason list. The code will also not display in the Lost Reason list in the setup unless you select to include inactive items by clicking the **Include Inactive** box when viewing the list.

1. Click **Lost Reason** on the left side of the screen.
2. Click the code in the list.
3. Click to clear the **Active** field.
4. Click **Save** to save the information. You will see a green "Success" message verifying the information has been saved.

## Adding Finance Setup Information

The Finance section contains setup options used by the Finance Department. This is where you will add the banks used for financing deals. You will also add information for the front and back adds your dealership offers as well as details about additional coverage you sell.

### Finance Info

The Finance Info determines the default entries that are automatically applied when you start a new deal. The defaults can be changed when working the deal. This setup is optional, but adding defaults here can save time while working the deal if most deals use the same information.

1. Click **Finance Info** on the left side of the screen.
2. The **General Defaults** section allows you to set default information that applies to all deals.
3. Use the **Deal Type** list to select the default deal type: Balloon, Cash, Retail, Lease, or Wholesale.
4. Use the **Vehicle Type** list to select the default vehicle type: new or used.
5. Use the **Selling Price** list to select if the selling price is based on the MSRP or Internet price.
6. In **Next Deal Number**, type the deal number you want to use as the starting point. Once you set the starting number, this field will increment as deals are created and will display the next deal number that will be used. The importance of this field is twofold. In addition to serving as a reference for the deal numbers, it allows you to start a new numbering system at the beginning of each year as required by your dealership.
7. The **Trade Stock Numbering** list allows you to determine how stock numbers are assigned to trades. If you select **ABC** the program will assign a stock number to the trade vehicle that consists of the selling car's stock number with an alpha character suffix (starting with A for Trade 1 in a deal and M for Trade 2 in a deal). If you select **Last Six of VIN**, the program will use the last six characters of the vehicle's VIN as the stock number. If you select **Manual**, you will need to manually assign stock numbers to trade vehicles.
8. The **Default Sales Manager** and **Default Finance Manager** lists allow you to set the default Sales Manager and Finance Manager for deals. The selected employees will be added to every deal. These entries can be edited as needed for each deal.

- The **Default Inventory Search** setting determines which inventory search is initially available when you access the vehicle inventory in both the Inventory section of the program and in a deal. **Search** will default search options that allows you to search for a vehicle based on stock number, VIN, invoice number, or order number.

**Filter** will default filter options you can use to filter the inventory list based on vehicle type, inventory status, year, make, model, color and price.

- Click to select the **Show Finance Charge On Disclosure** field to make the finance charges print on the disclosure form. Click to clear this field to prevent the finance charges from printing on the disclosure form.
- The **Use Enhanced Workflow** option determines how the workflow for deals is presented. If you use the enhanced workflow, the options available for the deal are based on the stage of the deal (desk, working, finance, etc.). If you select not to use the enhanced workflow, all deal options are available as soon as you create the desk.
- The **Retail and Lease Defaults** allow you to set default information that will be set for all retail and lease deals in the program.
- In **Retail Term**, type the number of months you want to set as the default financing term in months for retail deals.
- The **Retail Rate** field allows you to set a default financing term. Type the desired term.

15. In **Retail Monthly DTFP**, type the number of days before the first payment will be due.
16. Use the **Retail Term Offset** and the **Retail Rate Offset** fields to specify the offset value you want to use.
17. Use the **Lease Residual %** field to specify the default residual for lease deals.
18. If you have multiple stores set in the system, use the Store defaults section to set the default store that should be used for each vehicle type listed.
19. Click **Save** to save the information. You will see a green “Success” message verifying the information has been saved.

## Banks

When you add a new bank to the setup, you must first add the information for the finance company. Then, you can specify the defaults for the finance company that will be used to make calculations when you select to apply this bank to a deal. Once you add the finance company, you can add the lien holder and loss payee.

ID	Bank Name	Address	City	State	Zip	Status	Outside Lien
BK1000	Ally Financial	1407 Roemer Blvd	Farrell	PA	16121	Active	No
BK1011	Farmers Bank NNA	1407 Roemer Blvd	Farrell	PA	16121	Active	No
BK1003	First Credit Union of Hermitage		Hermitage	PA		Active	Yes
BK1004	First National Bank					Active	Yes
BK1002	Ford Motor Credit	678 Main Rd	Detroit	MI	48202	Active	No

Page 1 of 3 View 1 - 5 of 11

Include Inactive [Add New](#)

Type	Name	Address	City	State	Zip	Delete
Finance Company	Ally Financial	1407 Roemer Blvd	Farrell	PA	16121	
Lien Holder	GMAC	P.O. Box 555	Farrell	PA	16121	
Loss Payee	General Motors	3241 East State St.	Hermitage	PA	16148	

OutsideLien  Active

**Address**

Type: Finance Company Bank Id: BANKID

Name: Ally Financial Display Name: Ally Financial

Address: 1407 Roemer Blvd City: FARRELL State: PA ZIP: 16121

Work: 724 - 699 - 3610 Fax: 724 - 301 - 5656

[Save](#)

**Tip:** The ID field contains a system-assigned ID for each bank. This ID is used as a unique identifier for the bank for third-party integrations.

## Adding Banks

1. Click **Banks** on the left side of the screen.
2. Click **Add New** under the bank list.
3. The **Type** field defaults to **Finance Company**. You cannot edit this field for the first entry added for the bank since all bank entries require information for the finance company.
4. Use the **Bank ID** field to type the ID number for the bank.
5. Type the bank name in the **Name** field. This is a required entry. A name is the minimum information required to add a bank.
6. The **Display Name** field defaults to the name entered in the **Name** field. You can edit this field to contain the name you want to appear in the **Bank** selection list in the deal. The **Display Name** can be used to help differentiate branches of the same bank you may use for financing.
7. The address is optional, but if you select to add address information for the bank, the **State** field is required.
8. Type the work and fax numbers for the bank. These are option entries.
9. Use the **Outside Lien** box to flag the bank as the lien holder.
10. The **Active** field is automatically selected. You should leave this setting for new banks.
11. Click **Save** to save the information. You will see a green "Success" message verifying the information has been saved.
12. The bank you added appears in a secondary table, and the **Defaults** tab is now available. The information you enter on this tab determines how the program makes calculations. Enter the information as needed for the bank.

Information	Defaults
Type <input type="text" value="Standard"/>	
Max Gap <input type="text" value="0.00"/>	
<input type="checkbox"/> 30 Day Month/360 Day Year <input type="checkbox"/> Do Not Tax Rebates <input type="checkbox"/> Include Negative Equity In Total Down	
<b>Reserve</b>	
Calculation <input type="text" value="Ratio Method"/>	Participation % <input type="text" value="0.00 %"/>
Account Number <input type="text"/>	Control # <input type="text"/>
<b>Mileage</b>	
Excess Mileage Charge <input type="text" value="0.00"/>	
Miles Over Threshold <input type="text" value="0"/>	<input type="checkbox"/> From Zero <input type="text" value="0.00"/> Mileage Adjust
<b>Fees</b>	
Lender <input type="text" value="0.00"/>	<input type="checkbox"/> Front <input type="checkbox"/> Back
Disposition <input type="text" value="0.00"/>	
Purchase Option <input type="text" value="0.00"/>	
Security Deposit <input type="text" value="0.00"/>	<input type="checkbox"/> Payment
Acquisition <input type="text" value="0.00"/>	<input type="checkbox"/> Payment
Bank <input type="text" value="0.00"/>	<input type="checkbox"/> Payment <input type="checkbox"/> APR
VSI <input type="text" value="0.00"/>	<input type="checkbox"/> Payment <input type="checkbox"/> APR
<input type="button" value="Save"/>	

- Click **Save** to save the information. You will see a green “Success” message verifying the information has been saved.

### Adding a Lien Holder or Loss Payee

In addition to adding the bank’s primary address, you can also add addresses for the bank’s lien holder and loss payee departments. The lien holder is the address for the department that actually holds the title for the vehicle until the loan is paid in full. The loss payee department is where the payments for any insurance claims against the loss of the vehicle will be made.

- Once the finance company appears in the secondary list, click **Add New** under the bank.
- In **Type**, select if this is a Lien Holder or Loss Payee for the bank. As you add addresses to the bank, the list will only display the remaining options.

The screenshot shows a software interface with two tabs: "Information" and "Defaults". The "Information" tab is active. At the top right, there are checkboxes for "OutsideLien" (unchecked) and "Active" (checked). Below this is a table with columns: Type, Name, Address, City, State, Zip, and Delete. The first row contains "Finance Company", "First Credit Union of Hermitage", and empty cells for Address, City, State, Zip, and Delete. A "Cancel" button is located below the table.

Below the table is the "Address" section. It contains a "Type" dropdown menu with "Lien Holder" selected. To the right of the dropdown are input fields for "Name" and "Bank Id". Below these are fields for "City", "State" (a dropdown menu), and "ZIP". At the bottom of the address section are "Work" and "Fax" phone number fields, each consisting of three input boxes separated by dashes. A "Save" button is located at the bottom right of the form.

- Type the name associated with this branch of the bank.
- Complete the address and phone fields as needed.
- Click **Save** to save the information. You will see a green “Success” message verifying the information has been saved.
- The **Default** tab is available. Enter the information as needed.
- Click **Save** to save the information. You will see a green “Success” message verifying the information has been saved.

## Removing a Bank

You cannot delete the finance company, but you can delete the lien holder or loss payee for a bank. Your only option to remove a finance company is to flag it as inactive so it no longer appears in the bank list when adding a bank to a deal. The bank will also not display in the Bank list in the setup unless you select to include inactive items by clicking the **Include Inactive** box when viewing the list.

1. Click **Banks** on the left side of the screen. Click a bank in the bank list.
2. An **X** appears in the **Delete** column for the lien holder and loss payee. Click the **X** to delete the entry.

Information		Defaults				
						<input type="checkbox"/> OutsideLien <input checked="" type="checkbox"/> Active
Type	Name	Address	City	State	Zip	Delete
Finance Company	Ally Financial	1407 Roemer Blvd	Farrell	PA	16121	
Lien Holder	GMAC	P.O. Box 555	Farrell	PA	16121	X
Loss Payee	General Motors	456 Main Rd	Hermitage	PA	16148	X

3. The program prompts you that this action will permanently delete the bank. Click **Continue** to acknowledge the message and to delete the bank.

## Trade Lien Holder

The **Lien Holder** option allows you to create a list of lien holders. In the event there is still a lien on a trade vehicle involved in a deal, you can select the appropriate lien holder. This ensures there is a record of whom the dealership needs to pay in order to obtain the title for the vehicle.

**Lien Holder**

Lien Holder	Status
Bank of the South	Active
Ford Motor Credit	Active
Huntington Bank	Active
Mazda Credit	Active
PNC	Active

View 1 - 5 of 5

Include Inactive

---

**Lien Holder**

Ford Motor Credit  Active

**Address**      **City**      **State**      **ZIP**

101 Main Road      Farrell      PA      16121

**Work**

123 - 123 - 1234

### Adding a Trade Lien Holder

1. Click **Trade Lien Holder** on the left side of the screen.
2. Click **Add New**.
3. In **Lien Holder**, type the lien holder's name.
4. The address is optional, but if you select to add address information for the bank, the **State** field is required.
5. In **Work**, type the lien holder's phone number.
6. The **Active** field is automatically selected. You should leave this setting for new lien holders.
7. Click **Save** to save the information. You will see a green "Success" message verifying the information has been saved.

### Removing Trade Lien Holders

You cannot delete lien holders once you create them. Your only option is to flag the lien holder as inactive so it no longer appears in the lien holder list. The lien holder will also not display in the Lien Holder list in the setup unless you select to include inactive items by clicking the **Include Inactive** box when viewing the list.

1. Click **Lien Holder** on the left side of the screen.
2. Click the lien holder in the list.
3. Click to clear the **Active** field.
4. Click **Save** to save the information.

## Taxes & Fees

The Taxes & Fees setup is where you will specify the state tax schemes you will use. You will select to add all the states whose taxing you will need to use. Once you add a state and set the taxing defaults, you can add the fees for the state. When you select the state for a deal, the taxing and fees automatically pull to the deal.

State	Default Primary Rate	Default State	Remove
Alabama	6.00000000%	<input type="radio"/>	<input type="button" value="X"/>
Kentucky	6.50000000%	<input type="radio"/>	<input type="button" value="X"/>
New York	7.50000000%	<input type="radio"/>	<input type="button" value="X"/>
North Carolina	6.00000000%	<input type="radio"/>	<input type="button" value="X"/>
Ohio	6.00000000%	<input type="radio"/>	<input type="button" value="X"/>
Pennsylvania	6.00000000%	<input checked="" type="radio"/>	<input type="button" value="X"/>

**Taxes & Fees Setup**

**Taxes** | Fees | Accounting

**Tax 1**

Description:

	Primary	Lease
Rate	<input type="text" value="6.000000 %"/>	<input type="text" value="9.000000 %"/>
Alternate Rate	<input type="text" value="0.000000 %"/>	<input type="text" value="0.000000 %"/>

Default Additional Tax In Payment  
 Default Upfront Lease Tax In Payment  
 Default Tax On Cap Reduction In Payment  
 Default Tax Vehicle Wholesale

Zipcode Tax Decoder

State:   
 County:   
 Local:

**Tip:** By default, the first state you add becomes the default state. Click to select the **Default State** radio button in the state list to set a different default state. The default state's taxes are automatically applied when creating a new desk. The state can be edited as needed.

## Adding States

1. Click **Taxes & Fees** on the left side of the screen.
2. Click **Add New**.
3. A list of states appears. Click the state in the list you want to add, and click **Add State**.
4. The **Taxes** tab displays the taxing the state uses. Each state will use different taxes, so the fields displayed on this tab may vary from the screen above. You can type a description for the taxes if desired.
5. Click to select the **Default Additional Tax In Payment** box to include the tax in the payment.

6. Click to select the **Default Upfront Lease Tax In Payment** to include this tax in the payment.
7. Click to select the **Default Tax On Cap Reduction In Payment** to this amount in the payment.
8. Click to select the **Default Tax Vehicle Wholesale** if the state taxes wholesale sales.
9. If the state has multiple taxes, use the **ZIP Code Tax Decoder** State, County, and Local lists to specify the rate should be used for each tax. The program will automatically assign the state and states taxes to a deal based on the applicant's ZIP code.
10. Click **Save** to save the information. You will see a green "Success" message verifying the information has been saved.
11. Click **Fees**. The **Fees** tab displays the fees the state charges. Again, each state charges different fees, so the fields displayed on this tab may vary from the screen shot below

Taxes		Fees		Accounting										
Local Fees														
Fee	Description	Amount	New	Used	Retail	Pmt	Lease	Pmt	Balloon	Pmt	Cash	Whole	Tax 1	Alt
Documentation	Documentary Fee	100.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>									
Lien/Filing	Lien Fee	90.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>									
Tire	Tire Fee	80.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Messenger	Messenger Fee	70.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>									
Electronic/Online	Online Fee	60.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>									
Licensing Fees														
License	70.00	Registration	60.00	Certificate of Title	50.00									
Transfer	40.00	Increase	30.00	Notary	20.00									
Temp Tag	0.00													
Default Total Licensing Fees In-Payment														
<input type="checkbox"/> Retail														
<input type="checkbox"/> Lease														
<input type="checkbox"/> Balloon														
<input type="button" value="Save"/>														

12. Enter the fees and amounts charged by the state.
13. Click to select the deal types that require the fee and specify if the fee should be added to the payment.
14. Click to select the taxes that apply to the fee.
15. Enter any licensing fees that apply, and indicate if the licensing fees need to be added to the payment.
16. Click to select the deal types that require the licensing fees to be included in the payment.
17. Click **Save** to save the information. You will see a green "Success" message verifying the information has been saved.

- Click **Accounting**. The Accounting tab displays all of the taxes and fees available for deals. Use the drop-down lists next to each item to indicate how the item should post in the deal when transferred to Accounting.

The screenshot shows the 'Accounting' tab of the software interface. It is organized into several sections:

- Taxes (Retail, Cash, Balloon and Wholesale):** Contains 'Tax 1' (Sales Tax) and 'Additional Tax' (Other Tax).
- Taxes (Lease):** Contains six items, each with a 'Bank Pays Taxes' drop-down menu: 'Up Front Tax In Payment', 'Up Front Tax Not In Payment', 'Tax On Cap Reduction In Payment', 'Tax On Cap Reduction Not In Payment', 'Additional Tax In Payment', and 'Additional Tax Not In Payment'.
- Local Fees:** Contains five items, each with a 'State Fees' drop-down menu: 'Documentation' (Misc Income), 'Lien/Filing', 'Tire', 'Messenger', and 'Electronic/Online'.
- Licensing Fees:** Contains seven items, each with a 'State Fees' drop-down menu: 'License', 'Registration', 'Certificate of Title', 'Transfer', 'Increase', 'Notary', and 'Temp Tag'.

A 'Save' button is located at the bottom right of the form.

- Click **Save** to save the information. You will see a green “Success” message verifying the information has been saved.

## Removing a State

- Click **Taxes & Fees** on the left side of the screen.
- Click the **X** in the remove column for the state you want to delete.
- The program prompts you that this action will permanently delete the state. Click **Continue** to acknowledge the message and to delete the state.

## Insurance Companies

Use the Insurance Companies setup to add all of the vehicle insurance companies you deal with. This pertains to vehicle insurance only. Life, accident, and health insurance information is set up under Life A&H. Once you add companies to the setup, you can add insurance agents.

Insurance Company	Status
AllState	Active
Erie Insurance	Active
Geico	Active
Progressive	Active
Safe Auto	Active

Page 1 of 2 View 1 - 5 of 6

Include Inactive

Name:   Active

NAIC:

## Adding Insurance Companies

1. Click **Insurance Companies** on the left side of the screen.
2. Click **Add New**. Fields display on the bottom of the screen.
3. Type the name for the insurance company.
4. Type the insurance companies National Association of Insurance Commissioners number in the **NAIC** field.
5. The **Active** field is automatically selected. You should leave this setting for new insurance companies.
6. Click **Save** to save the information. You will see a green "Success" message verifying the information has been saved.

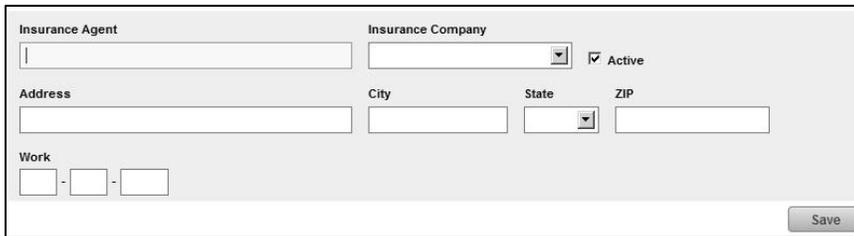
## Removing an Insurance Company

You cannot delete insurance companies once you have added them to the setup. Your only option is to flag the insurance company as inactive so it no longer appears in the insurance company list. The insurance company will also not display in the Insurance Companies list in the setup unless you select to include inactive items by clicking the **Include Inactive** box when viewing the list.

1. Click **Insurance Co.** on the left side of the screen.
2. Click the company in the list.
3. Click to clear the **Active** field.
4. Click **Save** to save the information. You will see a green "Success" message verifying the information has been saved.

## Adding Insurance Agents

1. Click **Insurance Agents** on the left side of the screen.
2. Click **Add New**. Fields display on the bottom of the screen.



3. Type the insurance agent's name. This is a required entry.
4. Use the **Insurance Company** list to select the company where this agent works. The list includes all the insurance companies you added to the setup. This is a required entry.
5. The **Active** field is automatically selected. You should leave this setting for new agents.
6. The remaining information is optional. However, if you add an address, the **State** is a required entry.
7. Click **Save** to save the information. You will see a green "Success" message verifying the information has been saved.

## Removing an Agent

You cannot delete insurance agents once you have added them to the setup. Your only option is to flag the insurance agent as inactive so it no longer appears in the insurance agent list. The insurance agent will also not display in the Insurance Agents list in the setup unless you select to include inactive items by clicking the **Include Inactive** box when viewing the list.

1. Click **Insurance Agent** on the left side of the screen.
2. Click the agent in the list.
3. Click to clear the **Active** field.
4. Click **Save** to save the information. You will see a green "Success" message verifying the information has been saved.

## Front Adds

This is where you enter the Front Adds you will apply to deals. You can enter unlimited front adds.

ID	Name	Retail	Cost	MSRP	Deal Default	Status
FA1009	16" Alloy Wheel				No	Active
FA1006	Body Side Molding				No	Active
FA1003	Car Cover	\$230.00	\$100.00	\$200.00	No	Active
FA1010	Door Edge Guards	\$81.00	\$20.00		No	Active
FA1000	Etch	\$150.00	\$50.00	\$150.00	No	Active

Page 1 of 3    View 1 - 5 of 11

Include Inactive   

---

**Name**

Car Cover     Default In Payment     Default In Deal     Active     Use Alternate Tax

**Retail**      **Cost**      **MSRP**

230.00      100.00      200.00

**Tax Defaults**

Tax 1     Tax 2     Tax 3

**Tip:** The ID field contains a system-assigned ID for each front add. This ID is used as a unique identifier for the item for third-party integrations.

## Adding a New Item

1. Click **Front Adds** on the left side of the screen.
2. Click **Add New**. Fields display on the bottom of the screen.
3. Type a name/description for the item.
4. Click **Default in Payment** if this item should be added to the payment.
5. The **Default In Deal** field determines if this item is automatically added to new deals. Click to select this box to add the item automatically.
6. The **Active** field is automatically selected. You should leave this setting for new adds.
7. The **Use Alternate Tax** field allows you to apply the alternate tax rate to the front add. If you select this option, the alternate tax rate set for the taxing state will be used to calculate the tax for the front add instead of the standard rate.
8. Next, specify the retail price, cost, and MSRP for the item.
9. The **Account Number Setup** section allows you to specify the general ledger account numbers used to post this item to the books in Autosoft DMS Accounting module. If you specify the account numbers here, the item will automatically post to the specified accounts using the selected control.
10. Use the **Tax Defaults** section to specify the taxing that applies to this item.

11. Click **Save** to save the information. You will see a green “Success” message verifying the information has been saved.

### Removing Items

You cannot delete front adds once you have added them to the setup. Your only option is to flag the item as inactive so it no longer appears in the list when adding front adds to a deal. The item will also not display in the Front Adds list in the setup unless you select to include inactive items by clicking the **Include Inactive** box when viewing the list.

1. Click **Front Adds** on the left side of the screen.
2. Click the item in the Front Adds list.
3. Click to clear the **Active** field.
4. Click **Save** to save the information. You will see a green “Success” message verifying the information has been saved.

### Back Adds

This is where you enter the Back Adds you will apply to deals. You can enter unlimited back adds.

ID	Name	Type	Retail	Cost	MSRP	Deal Default	Status
BA1000	Driver Care	Environmental Protection	\$138.00	\$45.00	\$125.00	No	Active
BA1002	Etch	Etch	\$325.00	\$150.00	\$300.00	No	Active
BA1004	Fabric & Leather Protection	Interior Protection	\$230.00	\$100.00	\$200.00	No	Active
BA1003	Key Care	Key Replacement	\$175.00	\$75.00	\$160.00	No	Active
BA1005	NSD - Complete Titanium	Road Hazard	\$519.00	\$215.00	\$500.00	No	Active

Page 1 of 2 View 1 - 5 of 6

Include Inactive

**Name**  **Type**   Default In Payment  Default In Deal

Active  Use Alternate Tax

**Description**

**Retail**  **Cost**  **MSRP**

**Account Number Setup**

New Retail Account #	New Cost Account #	Used Retail Account #	Used Cost Account #	Payable Account #	Control
<input type="text" value="444"/>	<input type="text" value="644"/>	<input type="text" value="454"/>	<input type="text" value="654"/>	<input type="text" value="300B"/>	<input type="text" value="S"/>

**Tax Defaults**  
 Tax 1  Tax 2  Tax 3

**Tip:** The ID field contains a system-assigned ID for each back add. This ID is used as a unique identifier for the item for third-party integrations.

## Adding a New Item

1. Click **Back Adds** on the left side of the screen.
2. Click **Add New**. Fields display on the bottom of the screen.
3. Type a name for the item.
4. Use the **Type** list to select a type/category for the item.
5. Click **Default in Payment** if this item should be added to the payment.
6. The **Default In Deal** field determines if this item is automatically added to new deals. Click to select this box to add the item automatically.
7. The **Active** field is automatically selected. You should leave this setting for new adds.
8. The **Use Alternate Tax** field allows you to apply the alternate tax rate to the back add. If you select this option, the alternate tax rate set for the taxing state will be used to calculate the tax for the back add instead of the standard rate.
9. Type a description for the item that explains about the back add.
10. Next, specify the retail price, cost, and MSRP for the item.
11. The **Account Number Setup** section allows you to specify the general ledger account numbers used to post this item to the books in Autosoft DMS Accounting module. If you specify the account numbers here, the item will automatically post to the specified accounts using the selected control.
12. Use the **Tax Defaults** section to specify the taxing that applies to this item.
13. Click **Save** to save the information. You will see a green “Success” message verifying the information has been saved.

## Removing Items

You cannot delete back adds once you have added them to the setup. Your only option is to flag the item as inactive so it no longer appears in the list when adding back adds to a deal. The item will also not display in the Back Adds list in the setup unless you select to include inactive items by clicking the **Include Inactive** box when viewing the list.

1. Click **Back Adds** on the left side of the screen.
2. Click the item in the Back Adds list.
3. Click to clear the **Active** field.
4. Click **Save** to save the information. You will see a green “Success” message verifying the information has been saved.

## Coverage Provides

Coverage providers are all vendor who provide service you sell to customers during the deal. Once you add coverage providers to the setup, you can then add the Gap, service, warranty, and maintenance plans the provider offers.

Type	Name	Status
Gap	Northeast GAP	Active
Gap	Old Republic G.A.P.	Active
Gap	Ownerguard Corp	Active
Gap	Zuric	Active
Maintenance	ABC Maintenance Corp	Active

Page 1 of 3 | View 1 - 5 of 15

Include Inactive

**Name:** Zuric **Dealer Number:** Z123456 **Coverage Type:** Gap  Manufacturer  Active

**Address:** 564 East Trade Street **City:** Farrell **State:** PA **ZIP:** 16121

**Contact Name:** Mitch Anderson **Work Number:** 123 - 456 - 7890 **Fax Number:** - - -

**Account Number Setup**

New Retail Account #	New Cost Account #	Used Retail Account #	Used Cost Account #	Payable Account #	Control
232	565	323	656	100B	V

**Tax Defaults**

Tax 1  Tax 2  Tax 3  Use Alternate Tax  Calculation Gap **Gap Reserve:** 30.000000%

## Adding Providers

1. Click **Coverage Providers** on the left side of the screen.
2. Click **Add New**. Fields display on the bottom of the screen.
3. Type the provider's name. This is a required entry.
4. Type the provider's dealer number.
5. Use the **Coverage Type** list to select the type of coverage this provide offers. This is a required entry.



6. The remaining information is optional. However, if you add an address, the **State** is a required entry.
7. The **Account Number Setup** section allows you to specify the general ledger account numbers used to post services to the books in Autosoft DMS Accounting module. If you specify the account numbers here, the item will automatically post to the specified accounts using the selected control.
8. Use the **Tax Defaults** section to specify the taxing that applies to this item. (The **Calculation Gap** and **Gap Reserve** fields apply to Texas only.)
9. If this is a manufacturer coverage provider, click to select the **Manufacturer** box.
10. The **Active** field is automatically selected. You should leave this setting for new providers.
11. Click **Save** to save the information. You will see a green “Success” message verifying the information has been saved.

### Removing Providers

You cannot delete providers once you have added them to the setup. Your only option is to flag the provider as inactive so it no longer appears in the list when adding services to a deal. The provider will also not display in the Coverage Providers list in the setup unless you select to include inactive items by clicking the **Include Inactive** box when viewing the list.

1. Click **Coverage Providers** on the left side of the screen.
2. Click the provider in the Coverage Provider list.
3. Click to clear the **Active** field.
4. Click **Save** to save the information. You will see a green “Success” message verifying the information has been saved.

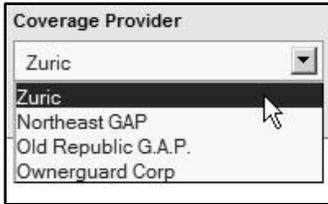
### Adding Plans

1. Click the plan type on the left side of the screen you want to add.



2. Click **Add New**. Fields display on the bottom of the screen. The fields that display vary based on the type of plan you are adding.
3. Type the plan name.

4. Use the **Coverage Provider** list to select the provider. This list displays all the coverage providers you added to the setup flagged as the selected provider type (Gap, Service, Warranty, or Maintenance).



5. Type a description for the plan.
6. Add any other information for the plan.
7. The **Default In Deal** field determines if this item is automatically added to new deals. Click to select this box to add the item automatically.
8. The **Active** field is automatically selected. You should leave this setting for new plans.
9. Click **Save** to save the information. You will see a green "Success" message verifying the information has been saved.

**Tip:** Each GAP, service, warranty, and maintenance plan will be assigned a system generated ID number that will display in the ID field in the corresponding plan list. This ID is used as a unique identifier for the item for third-party integrations.

## Removing Plans

You cannot delete plans once you have added them to the setup. Your only option is to flag the plan as inactive so it no longer appears in the list when adding services to a deal. The plan will also not display in the selected plan list in the setup unless you select to include inactive items by clicking the **Include Inactive** box when viewing the list.

1. Click the plan type on the left side of the screen.
2. Click the plan in the list.
3. Click to clear the **Active** field.
4. Click **Save** to save the information. You will see a green "Success" message verifying the information has been saved.

## Life A&H

Autosoft installs the Life A&H providers for you. This is where you create the life rate plans your dealership sells. You can obtain the information for life insurance and disability from the life insurance provider.

ID	Provider	Name	Deal Default	Status
LA1002	Cardif	Cardif Life	No	Active
LA1001	Protective	Protective Life	No	Active
LA1000	Protective	Protective Life	No	Active

View 1 - 3 of 3

Include Inactive

**Tip:** The ID field contains a system-assigned ID for each Life A&H provider. This ID is used as a unique identifier for the provider for third-party integrations.

### Adding a new Provider

1. Click **Life A&H** on the left side of the screen.
2. Click **Add New**. Fields display on the bottom of the screen.

Information				
Provider	Calculation	<input checked="" type="checkbox"/> Active	<input type="checkbox"/> Default in Deal	
Name		Group Number		
Address		City	State	ZIP
Contact	Work	Fax		

3. Select the provider from the **Provider** list. This is a required entry. If your provider is not listed, contact Autosoft.
4. Use the **Calculation** list to select the calculation method this provider uses for this plan. This is a required entry. If your plan is not listed, contact Autosoft.
5. The **Default In Deal** field determines if this item is automatically added to new deals. Click to select this box to add the item automatically.
6. The **Active** field is automatically selected. You should leave this setting for new plans.
7. Type the providers name and group number. The provider's name is a required entry.

8. The remaining information in this section is optional. However, if you add an address, the **State** is a required entry.
9. Under **Life Insurance Setup**, type the name for the life plan. This is a required entry.

The screenshot shows a form titled "Information". It includes the following fields and controls:

- Provider**: A dropdown menu.
- Calculation**: A dropdown menu.
- Active**: A checked checkbox.
- Default in Deal**: An unchecked checkbox.
- Name**: A text input field.
- Group Number**: A text input field.
- Address**: A text input field.
- City**: A text input field.
- State**: A dropdown menu.
- ZIP**: A text input field.
- Contact**: A text input field.
- Work**: A text input field with hyphens for separators.
- Fax**: A text input field with hyphens for separators.

10. Type the reserve and add description of the plan as needed. These are optional entries.
11. The **Life Type** defaults to **Decreasing-Gross**. Leave this entry, or select **Decreasing-Net** or **Level** as needed.
12. Use the **Cover Applicant** and **Cover Co-Applicant** boxes to default the coverage you want for this provider.
13. Under **Accidental & Health Setup**, type name for the plan. This is a required entry.

The screenshot shows a form titled "Accidental & Health Insurance Setup". It includes the following fields and controls:

- Name**: A text input field.
- Reserve %**: A text input field containing "0.00 %".
- Description**: A large text area for entering a description.
- A&H Type**: A dropdown menu set to "Retro".
- Days**: A dropdown menu set to "7".
- Critical Period**: A dropdown menu set to "None".
- Cover Applicant**: An unchecked checkbox.
- Cover Co-Applicant**: An unchecked checkbox.

14. Type the reserve, and add a description of the plan as needed. These are optional entries.
15. The **A&H Type** defaults to **Retro**. Leave this entry, or select **Non-Retro** as needed.
16. The **Days** defaults to **7**. Leave this entry, or select 14 or 30 as needed.
17. The **Critical Period** defaults to **None**. Leave this entry, or select **24 months**, **36 months**, or **48 months**.
18. Use the **Cover Applicant** and **Cover Co-Applicant** boxes to default the coverage you want for this provider.
19. The **Active** field is automatically selected. You should leave this setting for new entries.
20. Click **Save** to save the information. You will see a green "Success" message verifying the information has been saved.

## Removing Providers

You cannot delete providers once you have added them to the setup. Your only option is to flag the provider as inactive so it no longer appears in the list when adding services to a deal. The provider will also not display in the Coverage Providers list in the setup unless you select to include inactive items by clicking the **Include Inactive** box when viewing the list.

1. Click **Life A&H** on the left side of the screen.
2. Click the provider in the Coverage Provider list.
3. Click to clear the **Active** field.
4. Click **Save** to save the information. You will see a green “Success” message verifying the information has been saved.

## Commissioning

The **Commissioning** setup is where you add general commission defaults. This is the information that will be used to calculate commission unless an individual employee as commission setting in their employee setup. The program always uses the individual employee commission settings first. The program only uses the setting entered here if no individual commission settings exist.

Commission Setup											
Front Gross Setup											
<input checked="" type="checkbox"/> Include Holdback		<input checked="" type="checkbox"/> Include Pack		<input type="checkbox"/> Include Advertising		<input checked="" type="checkbox"/> Include Dealer Charges					
Commission Setup											
	Holdback	Pack	Advertising	Dealer Charges	Front End	Front End Flat	Back End	Back End Flat	Reserve	Reserve Flat	
Salesperson	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	25.00 %	100.00	10.00 %	0.00	50.00 %	0.00	
Sales Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	30.00 %	0.00	0.00 %	0.00	0.00 %	0.00	
Finance Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	50.00 %	0.00	25.00 %	0.00	25.00 %	0.00	

1. Click **Commissioning** on the left side of the screen.
2. Under **Front Gross Setup**, click to select the items that should be included in the front gross.
3. Under **Commission Setup**, click to select the items available for commission.
4. Next, specify the percentages and flat rates that apply.
5. Click **Save** to save the information. You will see a green “Success” message verifying the information has been saved.

## Finishing up

When you are finished in the Setup, click **Dashboard** link at the top of the screen. As your dealership's needs change, you can edit the setup information at any time, adding information or removing information. Simply return to the corresponding area in the setup and add, edit, or remove the information as described in this chapter.

Once you finish entering setup information, you are ready to begin learning how to use the program. The remaining chapters will cover each feature in the program.

## Chapter 2 Customers

You will use the Customers option to add customers to the program. Autosoft Finance provides flexibility when adding customers. You can add anyone as a customer and can add even distinguish between individual customers and organizations. The program even lets you link individual customer records to organizations, providing comprehensive tracking.

Last Name	First Name	Address	City	State	Zip	Home Number	Cell Number
Smith	Adam						
Smith	Andrew	3824 Harvard St	West Middlesex	PA	16159		(337) 479-2320
Smith	David						
Smith	Joey						

### Customers vs. Ups

Customers in the Autosoft Finance are records of information. A salesperson can add anyone to the database whose information he/she wishes to keep on record. Anyone can be added as a customer. This could be an old customer with whom the salesperson is still in touch, a prospect the salesperson is currently working with, or a long-term prospect who may be buying a car sometime in the future. A customer does not need to be associated with a deal to be added to the program. A customer may have purchased a car at another dealership but brings the vehicle to your dealership for service.

An Up is a sales opportunity. When you add a customer as an applicant to a deal, this creates the Up—the potential deal. The Up is more about the opportunity it represents to the dealership than the individual.

### Individuals vs. Organizations

You have the option of adding individuals and organizations as customers. Individuals are records of individual people whose information you want to keep in the program. When an individual becomes an Up, the individual is the person associated with the deal.

An organization is the record of a business that you want to keep in the program. Once you add the organization, you can link individual customers or add individuals as representatives of the organization. Organizations are actually the customers. The organization is responsible for the terms associated with the deal. Representatives added to the organization are not actually the customers but merely representatives acting on behalf of the company.

## Searching for Customers

The Search screen is the foundation of the Customer database. You are required to search for a customer before you can select to add a new customer record. This ensures duplicate customer records are not added to the program.

1. Click **Customers** on the toolbar.
2. Click to select if you are searching for an individual or organization. The fields that display depend on the option you select.

A screenshot of a search selection interface. It features two radio button options: 'Individual' and 'Organization'. The 'Individual' option is selected, and a mouse cursor is pointing at it. The 'Organization' option is unselected.

3. Type the information you want to use to search for the customer. There are some considerations to keep in mind.
  - When entering partial entries in the **Name** fields, note that the program will search the entire name for the entries.
  - If you select to search by a phone number, you must type three digits in the box.
  - When searching notes, you must type three consecutive characters.
4. Click **Search**. A list of customers who meet the criteria you specify appears.

A screenshot of the Autosoft Dealer Management System search interface. The page title is 'ABC Motors' and the user is logged in as 'AsiAdmin | Admin'. The navigation menu includes 'Dashboard', 'Customers', 'Deals', 'Inventory', and 'Reporting'. The search criteria are: Last Name: Smith, Phone Number: [ ]-[ ]-[ ], and Individual selected. A warning message states: 'To avoid duplicate entries, you are required to search for the customer/organization before entering a new one.' There are buttons for 'Add New', 'Add New w/ Scanner', 'Clear', and 'Search'. The search results table is as follows:

Last Name	First Name	Address	City	State	Zip	Home Number	Cell Number
Smith	Adam						
Smith	Andrew	3824 Harvard St	West Middlesex	PA	16159		(337) 479-2320
Smith	David						
Smith	Joey						

The page footer shows 'Page 1 of 1' and 'View 1 - 4 of 4'.

5. Double-click a customer in the list to view the customer's summary appears.

**Tip:** The system saves your last search. When you navigate away from the screen and return to it, your last search will be displayed.

## Adding an Individual

1. Search for the individual as explained in the previous section.
2. Click the **Add New** link that appears in the top right side of the window.

**Tip:** You can also add a new customer using a driver's license scanner. See the corresponding appendix for information about using a driver's license scanner with the program.

3. A blank **Customer Information** tab appears.

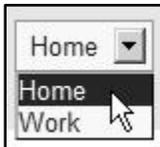
4. Add the customer's information.
5. To add an address, click the green **+**, and enter the address. The **Type** defaults to Physical. Select a different option as needed. You can add four addresses per individual: physical, mailing, garage, and work. Click the green **+** to add additional addresses as needed.

**Tip:** Once you type the street address, you can type the ZIP Code in the **ZIP** field and press TAB. The ZIP decoder will decode the ZIP Code and provide city, state, and county options for you to select. The corresponding fields will fill in with the selected data.

- To add phone numbers, click the green **+**, and enter the phone numbers. The **Type** defaults to Home. Select a different option as needed. You can add four phone numbers per individual: home, cell, work, and fax. Click the green **+** to add additional phone numbers as needed.



- To add an e-mail address, click the green **+**, and enter the address. The **Type** defaults to Home. Select a different option as needed. You can add two e-mail addresses per individual: home and work. Click the green **+** to add an additional e-mail address as needed.



- Click **Save** to save the information.
- You will see a green “Success” message verifying the information has been saved.

## Adding Credit Information

Once you add customer information, the **Credit Information** tab becomes available. This tab is where you enter credit information that will be used to run credit checks and for financing. This is optional based on the customer’s needs at your dealership.

- Click the **Credit Information** tab.
- Use the **Employer** and **Previous Employer** sections to record the customer’s work information.

3. Under **Income**, enter the financial information requested.
4. Use the **Current Residence** section to add the financial information pertaining to the customer's current address. This section only appears if you have added a physical address for the customer.
5. Under **Previous Residence**, enter the appropriate addresses and residency information.

Income				
Previous Financing	Additional Yearly Income	Additional Income Sources	Checking	Savings
<input type="text"/>	<input type="text" value="0.00"/>	<input type="text"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
Current Residence			Previous Residence	
Mortgage Co. / Landlord			Address	
<input type="text"/>			<input type="text"/>	
Payment/Rent	Occupancy Type	Mortgage Balance	Apt./Suite	
<input type="text" value="0.00"/>	<input type="text"/>	<input type="text" value="0.00"/>	<input type="text"/>	
Market Value	Years	Months	City	State
<input type="text" value="0.00"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
			County	ZIP
			<input type="text"/>	<input type="text"/>
			Occupancy Type	Years
			<input type="text"/>	<input type="text"/>
			Months	
			<input type="text"/>	<input type="text"/>

6. Under **Reference 1** and **Reference 2**, enter the information for the references the customer wants to use.

Reference 1			Reference 2		
First Name	Last Name		First Name	Last Name	
<input type="text"/>	<input type="text"/>		<input type="text"/>	<input type="text"/>	
Address	Apt./Suite		Address	Apt./Suite	
<input type="text"/>	<input type="text"/>		<input type="text"/>	<input type="text"/>	
City	State	ZIP	City	State	ZIP
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Phone			Phone		
<input type="text"/> - <input type="text"/> - <input type="text"/>	Ext. <input type="text"/>		<input type="text"/> - <input type="text"/> - <input type="text"/>	Ext. <input type="text"/>	
Relationship	Years Known	Months Known	Relationship	Years Known	Months Known
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="button" value="Save"/>					

7. Click **Save** to save the information.
8. You will see a green "Success" message verifying the information has been saved.

## Adding License Information

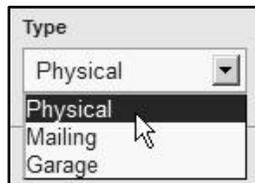
1. Click the **License** tab.

2. The **Driver's License Image** section will display the images added through the driver's license scanner. See the corresponding appendix for information about using a driver's license scanner with the program.
3. Under **Driver's License Information**, type the license number.
4. Use the **State** list to select the licensing state.
5. Type the expiration date.
6. Click **Save**.
7. You will see a green "Success" message verifying the information has been saved.

## Adding an Organization

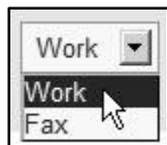
1. Search for the organization as explained on under "Searching for Customers."
2. Click the **Add New** link that appears in the top right side of the window.
3. A blank **Organization Information** tab appears.

4. Add the organization's information.
5. To add an address, click the green **+**, and enter the address. The **Type** defaults to Physical. Select a different option as needed. You can add three addresses per organization: physical, mailing, and garage. Click the green **+** to add additional addresses as needed.



**Tip:** Once you type the street address, you can type the ZIP Code in the **ZIP** field and press TAB. The ZIP decoder will decode the ZIP Code and provide city, state, and county options for you to select. The corresponding fields will fill in with the selected data.

6. To add phone numbers, click the green **+**, and enter the phone numbers. The **Type** defaults to Work. Select a different option as needed. You can add two phone numbers per organization: work and fax. Click the green **+** to add additional phone numbers as needed.



7. To add an e-mail address, click the green **+**, and enter the address. The **Type** defaults to Work. This is the only e-mail address option for an organization, and you can only add one e-mail address.
8. Click **Save** to save the information.
9. You will see a green "Success" message verifying the information has been saved.

## Adding Representatives to an Organization

Once you save an organization's information, the **Representatives** tab is available. This is where you will link individual customers to an organization.

1. Click the **Representatives** tab.
2. Click **Add New**.
3. Use the fields that appear to enter search criteria, and click **Search**. Remember, you always have to search for a customer before adding new customer information.

The screenshot shows two main sections: 'Organization Representatives' and 'Customers'.

**Organization Representatives:** This section contains a table with columns for First, Middle, Last, Title, and Status. Below the table is a search area with fields for Last Name, First Name, Phone Number, and Notes. There is a radio button for 'Individual' and a warning message: "To avoid duplicate entries, you are required to search for the customer/organization before entering a new one." Buttons for 'Clear' and 'Search' are present.

**Customers:** This section contains a table with columns for Last Name, First Name, Address, City, State, Zip, Home Number, and Cell Number. It also has a search area with 'Clear' and 'Search' buttons.

4. The bottom of the screen displays a list of customers who meet your search criteria. Double-click the customer you want to add to the organization, or click **Add New** if the customer record does not exist. (This link will not appear until you have searched for a customer.)

This screenshot is similar to the previous one but shows the results of a search. In the 'Organization Representatives' section, the search fields are populated with 'par' in the Last Name field. The 'Add New' and 'Add New w/ Scanner' links are now visible in the search area. The 'Customers' table below is empty, indicating no records were found for the search criteria.

- Under **Basic Information**, type the customer's information.

- Use the **Title** field to identify the representative's title with the organization.
- If you will be adding more than one representative to an organization, use the **Primary** box to flag the primary representative for the organization.
- To add an address, click the green **+**, and enter the address. The **Type** defaults to Physical. Select a different option as needed. You can add four addresses per individual: physical, mailing, garage, and work. Click the green **+** to add additional addresses as needed.

**Tip:** Once you type the street address, you can type the ZIP Code in the **ZIP** field and press TAB. The ZIP decoder will decode the ZIP Code and provide city, state, and county options for you to select. The corresponding fields will fill in with the selected data.

- To add phone numbers, click the green **+**, and enter the phone numbers. The **Type** defaults to Home. Select a different option as needed. You can add four phone numbers per individual: home, cell, work, and fax. Click the green **+** to add additional phone numbers as needed.
- To add an e-mail address, click the green **+**, and enter the address. The **Type** defaults to Home. Select a different option as needed. You can add two e-mail addresses per individual: home and work. Click the green **+** to add an additional e-mail address as needed.
- Click **Save** to save the information.
- You will see a green "Success" message verifying the information has been saved.

## Editing Customer Information

1. Search for the customer.
2. Double-click the customer in the Search list.
3. Click **Edit** at the bottom of the **Customer Information** or **Organization Summary** section. The customer's record opens.



Customer Information	
Cust No	AAC1000050
Name	Steve Smith
	<a href="#">Steve's Towing</a>
Address	55 Main St.
City	West Middlesex
State	PA
County	
ZIP	16159
Phone	(724) 555-1234 (Home)
	(724) 555-9876 (Work)

4. Edit the information as needed.
5. Click **Save** to save the changes.
6. You will see a green "Success" message verifying the information has been saved.

**Tip:** The Customer Number (Cust No) is a system-assigned ID. This ID is used as a unique identifier for the customer or organization for third-party integrations.

## Adding Notes

Notes allow you to add pertinent information to a customer's record. This can be general information you want to keep on hand about the customer, or information you want to make available to others who view the record. Notes are also a way of keeping a running history of the contact you have with the customer. Since notes cannot be removed, this serves as an important tool for collecting information relevant to the customer.

1. Search for the customer.
2. Double-click the customer in the Search list.
3. The customer's summary appears.
4. Click **Add Note**.

5. Type the note you want to add.



Enter Note

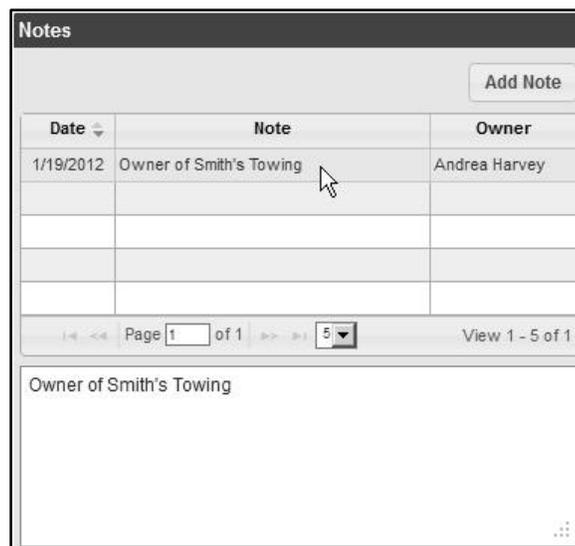
Owner of Smith's Towing

Save

6. Verify the information is correct. *You **cannot** edit a note once you add it.*
7. Click **Save**. The note appears under the **Notes** section.

## Viewing Notes

Under **Notes**, click the note in the list. The detail will display in the window at the bottom of the **Notes** section. You cannot edit notes.



Notes

Add Note

Date	Note	Owner
1/19/2012	Owner of Smith's Towing	Andrea Harvey

Page 1 of 1 View 1 - 5 of 1

Owner of Smith's Towing

## Viewing Deals

When you add a customer to a deal, the program links the deal and the customer. You can view the customer's deal history under the **Deals** section. This includes lost, sold, and working deals. For sold or lost deals, you can click a deal in the list to view the detail. For working deals, you can click the deal to go to the Deals section of the program to work the deal as needed. The program will continue to keep a running tally of the money the dealership has earned from this customer. You can start a new deal for the customer by clicking New Deal. This takes opens a new opens a new deal and automatically adds the customer as the applicant. (See Chapter 4 Deals for details about working a deal.)

Ups/Deals					
Status	Customer	Type	Date	Vehicle	Sales Rep
Finished	Applicant	Lease	10/28/2013	2010 Chevrolet Aveo	Mitch Shopinsky

Page 1 of 1 View 1 - 1 of 1

**Total Sold: 1    Total Front Gross: \$1,318.80    Total Back Gross: \$230.00**    [New Deal](#)

## Chapter 3 Inventory

The Inventory allows you to view and edit vehicle information. If you integrate with the Autosoft DMS, the inventory added in Autosoft DMS will automatically be added to Autosoft Finance, and the inventory added in the Autosoft Finance is added to your Autosoft DMS. Similarly, changes made to vehicle records will transfer between the programs to ensure the inventory information is current in both locations.

Autosoft Dealer Management System

ABC Motors AsiAdmin | Admin | (Asi Admin) Logout

Dashboard Customers Deals Inventory Reporting

Inventory Reports

**Inventory Search**

Stock #

Search By

Filter

Stock #	Type	Status	Year	Make	Model	Trim	Body	Color	Price
12345	New	In Inventory	2011	Chevrolet	Colorado	LT Truck	Ext. Cab	Black	\$25,000.00
20191	New	In Inventory	2011	Chevrolet	Silverado	LT	Truck	Black Granite	\$40,505.00
20325	New	In Inventory	2010	Chevrolet	Aveo	LT	SDN	Blue	\$17,840.00
BF0010	New	In Inventory	2012	Chevrolet	Silverado		Crew	Red	\$38,715.00
BF0020	Used	In Inventory	2006	Jeep	Grand Cherokee		4DR	Green	\$15,988.00

Page 1 of 6 View 1 - 5 of 27

Information Details Options Pricing Manufacturer Data Repair Orders

**Inventory Item Information**

Stock Number BF0010  
MSRP \$38,715.00  
Days On Lot 854

Type New Status In Inventory

VIN

Year 2012

Make Chevrolet

Model Silverado

Trim

Body Crew

Exterior Color Red

Interior Color

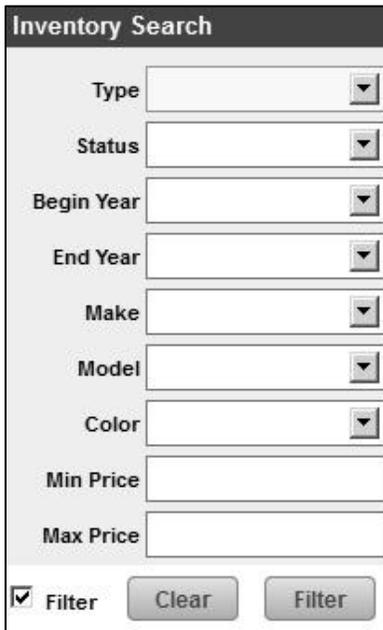
Odometer 1  Actual Miles

**Tip:** The fields that display in the **Inventory Search** section on the left side of the screen are determined by the **Default Inventory View** setting on the Finance Info screen in the Admin section.

## Filtering the Inventory List

By default, the screen displays all vehicles in the inventory. The fields on the left side of the screen allow you to filter the inventory list based on as much or as little information as you like. This makes it easy to find vehicles that match the customer's needs.

1. Click **Inventory**.
2. Click to select the **Filter** box if it is not already selected.
3. Under **Inventory Search**, use the drop-down lists to select or type the search criteria you want to use. You can enter as much or as little information as you want to add.



The screenshot shows a form titled "Inventory Search" with the following fields and controls:

- Type: dropdown menu
- Status: dropdown menu
- Begin Year: dropdown menu
- End Year: dropdown menu
- Make: dropdown menu
- Model: dropdown menu
- Color: dropdown menu
- Min Price: text input field
- Max Price: text input field
- Filter: checkbox (checked)
- Clear: button
- Filter: button

4. Click **Filter**.
5. The **Inventory** section on the top-right side of the screen lists the vehicles in inventory that match your search criteria.
6. Click a vehicle to view the detail. The detail displays on the bottom of the screen.

## Searching Inventory

While the filtering options allow you to enter basic information to locate any vehicle in inventory that meets various criteria, the search option allows you to search using specific information. This is useful when you are looking for a specific vehicle in inventory.

1. Click to clear the **Filter** box in the **Inventory Search** section if it is currently selected. The filtering drop-down lists are replaced with two fields.



The screenshot shows a window titled "Inventory Search". At the top, there is a "Stock #" text input field. Below it is a "Search By" label followed by a drop-down menu currently set to "Stock Number". At the bottom of the window, there is a "Filter" button with a mouse cursor over it, and two other buttons labeled "Clear" and "Search".

2. Use the **Search By** drop-down list to select the specific data you want to use for the search: stock number, last six of the VIN, invoice number, or order number.
3. The label for the first field changes based on the search criteria you select. Type the data in this field.
4. Click **Search**.
6. The **Inventory** section on the top-right side of the screen lists the vehicle in inventory that matches your search criteria.
7. Click the vehicle to view the detail. The detail displays on the bottom of the screen.

## Adding a Vehicle

When adding vehicles through the finance program, you cannot add certain accounting values. This information will not be added to the vehicle's record until the Accounting Department purchases the vehicle and posts the purchase to the books. The information will then be added to the finance inventory record through the DMS inventory sync.

1. Click **Inventory**.
2. Click **Add New**.
3. Use the **Information** tab to add the basic vehicle information. The **Stock Number**, **Type**, **Year**, and **Make** are required entries.

You can add an entry to any list with a green + next to it. Click the +, type the information you want to add, and click **Add**. The entry is added to the list.

**Tip:** Once you type the VIN, you can click **Decode** to use the VIN decoder to fill in the year, make, and model for the vehicle.

4. Click **Save**. You will see a green "Success" message verifying the information has been saved.

- The **Details** tab is where you will add additional information such as acquisition information, warranty details, etc. Note that the **Stock In Date** defaults to the current system date. This is the date you entered the vehicle into the program.

Information	Details	Options	Pricing	Manufacturer Data	Repair Orders
Title Number	<input type="text"/>	Stock In Date	<input type="text" value="01/07/2014"/>	Order Date	<input type="text"/>
Previous Owner	<input type="text"/>	Order Number	<input type="text"/>	Invoice Date	<input type="text"/>
Acquisition Source	<input type="text"/>	Invoice Number	<input type="text"/>		
Acquisition Type	<input type="text"/>	<input type="button" value="Enlarge"/>			
Description	<input type="text"/>				
Warranty Info	<input type="text"/>	Ignition Key	<input type="text"/>	Trunk Key	<input type="text"/>
Vehicle Weight	<input type="text"/>	Exterior Color Code	<input type="text"/>	Interior Color Code	<input type="text"/>
Cylinders	<input type="text"/>	Model Code	<input type="text"/>	Trim Code	<input type="text"/>
Seating Capacity	<input type="text"/>	Certification Number	<input type="text"/>		
Truck Capacity	<input type="text"/>	<input type="button" value="Save"/>			
Transmission Type	<input type="text"/>				
Engine Serial Number	<input type="text"/>				

**Tip:** Large amounts of data can be entered in the **Description** field. You can click **Enlarge** next to the **Description** field to open a secondary window that allows you to view large amounts of data more easily.

- Click **Save** to save the information entered on this tab. You will see a green "Success" message verifying the information has been saved.
- The **Options** tab is where you can add the options available on the vehicle.

Information	Details	Options	Pricing	Manufacturer Data	Repair Orders
<b>Options</b>					
Code	Name	Cost	MSRP	Remove	
Page 1 of 1					No Records
					<input type="button" value="Add New"/>

- To add an option, click **Add New**. Add the information for the option. You must add either an option code or option name for each option. Click **Save**. The option will display in the options list.

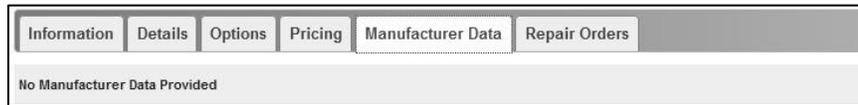
The screenshot shows the 'Options' tab in the software interface. At the top, there are navigation tabs: Information, Details, Options, Pricing, Manufacturer Data, and Repair Orders. The 'Options' tab is active, displaying a table with the following columns: Code, Name, Cost, MSRP, and Remove. The table is currently empty. Below the table, there is a pagination control showing 'Page 1 of 1' and 'No Records'. At the bottom, there are input fields for Code, Name, Description, Cost (0.00), and MSRP (0.00). There are also 'Cancel' and 'Save' buttons.

- The **Pricing** tab is where you add the pricing information for the vehicle. The dark gray fields are unavailable for editing since these fields display Accounting figures that must be updated through the Accounting module or through manufacturer vehicle invoice interfaces.

The screenshot shows the 'Pricing' tab in the software interface. At the top, there are navigation tabs: Information, Details, Options, Pricing, Manufacturer Data, and Repair Orders. The 'Pricing' tab is active, displaying a grid of input fields for various pricing components. The fields are arranged in two columns. The left column includes: Car Line, MSRP (0.00), ACV (0.00), Invoice Price (0.00), Internet Price (0.00), Book Value (0.00), Internal Services (0.00), PDI (0.00), Labor (0.00), Logistics Fee (0.00), Incremental Cost (0.00), and Total Option (0.00). The right column includes: Suffix, Dealer Prep (0.00), Dealer Pack (0.00), Holdback (0.00), Advertising (0.00), Internals (0.00), Invoice Total Amount (0.00), Subtotal (0.00), Tax (0.00), Courtesy Fee (0.00), Document Fee (0.00), and Appraised Value (0.00). A 'Save' button is located at the bottom right.

**Tip:** The Invoice Price, Dealer Pack, and Holdback are only available for users whose Roles & Permission settings allow them to view this information.

- Click **Save** to save the information entered on this tab. You will see a green “Success” message verifying the information has been saved.
- If you use manufacturer inventory integration, you can view additional data on the **Manufacturer Data** tab. You cannot enter information on this tab.



- The Repair Orders tab allows you to view the repair orders that have been created for the vehicle. Click a repair order in the list to view a summary of the RO.

The screenshot shows the 'Repair Orders' tab. It contains a table of repair orders and a detailed view of one.

ROs	Date	Status	Type	Service Advisor	Total
6723	7/7/2011	Closed	B	Tom Simpson	\$35.00

Page 1 of 1 | View 1 - 1 of 1

No	Repair	Repair Type	Parts	Labor	Other	Total
1	Lube Oil Filter		\$15.00	\$20.00	\$0.00	\$35.00
	<b>Sub Total</b>		<b>\$15.00</b>	<b>\$20.00</b>	<b>\$0.00</b>	<b>\$35.00</b>
	Total Discount					\$0.00
	Tax					\$2.00
	<b>Total</b>					<b>\$35.00</b>

## Creating a Desk for a Vehicle

When viewing an inventory record, you can use the **New Deal** link on the top-right side of the Information tab to create a new desk for the vehicle. The vehicle is automatically added to the desk.

- Click **New Deal**.



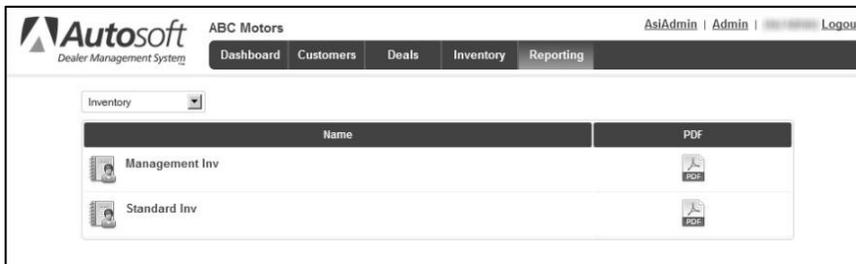
- Type a name for the desk, and click **Add**.
- A new desk opens with the vehicle already added to it.

## Generating Inventory Reports

1. Click **Inventory**.
2. Click **Inventory Reports** above the Inventory list.

Stock No	Type	Year	Make	Model	Trim	Body	Color	Price
12345	New	2011	Chevrolet	Colorado	LT Truck	Ext. Cab	Black	\$25,000.00
C0001	New	2011	Chevrolet	Corvette	Z06	Coupe	Inferno/Orange	\$72,999.99

3. The program takes you to the Reporting section of the program. **Inventory** is already selected as the report type.



4. The left side of the screen lists the available reports.
5. Click the report name you want to generate. (You can also click the PDF icon on the right to view the report in a PDF viewer.)
6. The report displays on the screen.
7. Use the report toolbar to view and print the report as needed.

## Chapter 4 Deals

The Deals option is where you manage your deals. Ups are referenced here because Ups represent a sales opportunity—a potential sale. However, it is possible to work parts of a deal without applying an Up. This gives you the flexibility of working numbers for a potential deal for a customer who walked into the dealership before adding the customer information to the program.

You can create four types of deals: cash, retail, lease, and wholesale. You create deals by selecting the deal type and filling in information on the corresponding screen. A majority of the default financial information automatically fills in from the information you entered in the setup (dealership fees, banks fees, tax information, etc.), so it is important that you finish entering setup information before attempting to create any deals. Once you enter information in the setup, you will not have to fill in every piece of information necessary to complete the deal. Instead, the program will automatically pull the information. If you do not enter the information in the setup, you will have to manually type the necessary information for each deal you create.

The information available when working a deal depends on the user's access rights. This affects what a user can add to a deal and what information a user can see. Below is a summary of the information available to each access right level.

- **Dealer Principal, Finance Administrator, and Finance Restricted:** These users have access to all options available for a deal. They can add, view, and edit all information.
- **Sales Administrator:** These users can add customer information to a deal (Applicant, Insurance, Trade, etc.) and can add all items under Desking. They also have access to integrations. They do not have access to deal forms, gross information, or commission information.
- **Sales Desking:** These users can add customer information to a deal (Applicant, Insurance, Trade, etc.) and can add all items under Desking. They do not have access to integrations, deal forms, gross information, or commission information.
- **Sales Restricted:** These users can only add customer information to a deal (Applicant, Insurance, Trade, etc.).

Deals progress through five stages based on the opportunity status: desking, working, finance, sold, and finalized. Desking is simply manipulating the numbers on a worksheet. Working is actually creating an Up by adding an applicant. Finance is when the Up becomes a deal. Sold is when the deal has been closed. Finalized is when the closed deal is updated to Accounting.

The order you choose to progress through the desking process is up to you. For example, you may sit with a customer to work numbers first, and then add the customer information to the deal. Another salesperson may always choose to add the customer information first before working any numbers. It is all personal preference, and the program provides the flexibility required for either approach. There is no right or wrong order. The only requirement is that an applicant must be added to the Up before it can be sent to finance.

The information presented in this chapter is not intended to recommend a workflow. Any process represented is offered as a way to present the necessary information needed to understand how to use the program. While certain pieces of information are only available to certain users and during certain stages of the deal, the process you will use will depend on your dealership's sales practices.

As you work through the screens, you should always click **Save** to save any information you have added to the deal. Safety measures have been added to the program to warn you when you attempt to navigate away from a screen without saving information. It is important that you read all prompts that appear to ensure you know exactly what will happen when you leave the page.

## Using the Deals List

When you click **Deals**, the screen displays a list of all the deals in the program (pending deals and deals sent to Accounting.) This is the same list that displays when the programs opens.

Deal #	Status	Type	Customer	Stock #	Vehicle Information	Purchase	Activity	Source	Salesperson	Assignee	In Use
17	Working	Cash	Haldane, Emmett			01/01/2014	01/07/2014	Referral	Shopinsky	Shopinsky	
16	Finance	Lease	Haynes, Joey	20191	2011 Chevrolet Silverado K1500	01/05/2014	01/07/2014	Service Customer	Shopinsky	Shopinsky	
15	Finance	Cash	Hardney, Adam			01/04/2014	01/07/2014	GM OneSource	Shopinsky	Shopinsky	
14	Working	Retail	Caraballo, Abel	C0001	2011 Chevrolet Corvette	01/06/2014	01/07/2014	Mailer	John	Shopinsky	
12	Working	Lease	Payne, Margaret			01/05/2014	01/07/2014	Service Customer	John	Shopinsky	

Once you start working with deals, you will not see this list when you click Deals. Instead, you will see the deals you have opened for viewing. The tab will display the applicant's last name or the name you assigned the deal when you started it. The last tab will always be the + tab. You can return to the Deals list by clicking the + tab.

Deal #	Status	Type	Customer	Stock #	Vehicle Information	Purchase	Activity	Source	Salesperson	Assignee	In Use
17	Working	Cash	Haldane, Emmett			01/01/2014	01/07/2014	Referral	Shopinsky	Shopinsky	
16	Finance	Lease	Haynes, Joey	20191	2011 Chevrolet Silverado K1500	01/05/2014	01/07/2014	Service Customer	Shopinsky	Shopinsky	
15	Finance	Cash	Hardney, Adam			01/04/2014	01/07/2014	GM OneSource	Shopinsky	Shopinsky	
14	Working	Retail	Caraballo, Abel	C0001	2011 Chevrolet Corvette	01/06/2014	01/07/2014	Mailer	John	Shopinsky	
12	Working	Lease	Payne, Margaret			01/05/2014	01/07/2014	Service Customer	John	Shopinsky	

The Deals list displays information in columns. You can use the column headings to sort the list. Click a heading to sort the list based on that piece of information. You can also filter the list using the fields displayed above the list. Select the filter options, and click **Filter**. The list will display only the deals that meet your criteria. The system will save your last search, so if you leave this screen, the system will display the results of your last search when you return to the Deals list. To view and edit the deal, double-click the deal in the list. The selected deal opens on the screen.



9. Click **Save** to save the customer's information.
10. The program prompts you to select the Up type and referral source for the Up. These are required to start a working deal. Use the **Type** list to select the type of Up: Internet, Other, Phone Up, or Walk In. These are preset in the program. Use the **Source** list to identify the source for this Up. These are the sources you created in the system setup.

11. Click **Save**.
12. You can add additional customer information (such as credit information and driver's license information) by clicking **Applicant** on the left side of the screen and then clicking the **Edit** link under the customer information. Add the information as needed, and click **Save**. Click **Back to Deal** to close the customer information and to return to the deal.

13. The top-right corner displays three pieces of information. First, it displays the deal type. This is the default deal type set in the setup. This will change if you assign the deal a deal type other than the default. Second, it displays the deal status as "Working." This will change to "Finance" when the deal is sent to the Finance Department. Finally, it displays the deal number. The program automatically increments the deals starting with the deal number set in the setup.



14. Continue to add information to the deal as needed.

## Creating a New Deal for an Existing Customer

1. Click **Deals**.
2. Click **New**.
3. Type a name for the deal, and click **Add**.
4. A blank deal opens.
5. Click **Applicant**.
6. Search for an individual or organization, and double-click the customer in the search list.
7. If a ZIP Code exists in the customer's record, the program will prompt you to verify the ZIP Code information you want to apply to the deal. Click to select the correct ZIP Code. This affects the tax rates that will be applied to the deal.
8. The program prompts you to select the Up type and referral source for the Up. Use the **Type** list to select the type of Up: Internet, Other, Phone Up, or Walk In. These are preset in the program. Use the **Source** list to identify the source for this Up. These are the sources you created in the system setup.
9. If you were required to select a ZIP Code for the customer and the ZIP Code differs from the ZIP Code currently on record for the customer, the bottom of the Applicant Information prompt displays the selected ZIP Code. The **Replace Address** box saves the selected ZIP Code to the customer's record. Clear the box if you don't want to save the selected ZIP Code.

10. Click **Save**.
11. The program adds the customer to the deal.
12. Continue to add information to the deal as needed.

**Tip:** You can also start a working deal from the Customer Summary screen by clicking the **New** link under the **Deals** section of the customer's summary.

## Adding a Co-Applicant

A customer is also considered an applicant since there may be financing involved in the deal. Once you add a customer to the deal, you can add a co-applicant.

1. Click **Applicant**.
2. Click **Add Co-Applicant**.

3. Search for an individual or organization.
4. Double-click the customer in the search list, or click **Add New** to add information for a new customer.
5. The customer is added to the deal as the co-applicant.

## Removing a Co-Applicant

1. Click **Applicant**.
2. Click the red **X**.
3. Click **Continue** when prompted to verify you want to remove the co-applicant.

## Swapping the Applicant and Co-Applicant

1. Click **Applicant**.
2. Click **Swap**.
3. The applicant becomes the co-applicant and vice versa.

## Editing Customer Information

The **Edit** link under the customer information on the **Applicant** screen allows you to edit the customer information in the program. Any changes you make are saved to the customer's record.

The screenshot shows a web application interface with a sidebar on the left and a main content area. The sidebar contains a list of menu items: Information, Applicant, Insurance, Vehicle, Trade, Activities, Up Forms, Desking, Front End, Taxes, and Fees. The main content area is titled 'Applicant' and displays the following information:

Cust No	AAC1000050
Name	Steve Smith
Address	Steve's Towing
City	55 Main St.
State	West Middlesex
County	PA
ZIP	16159
Phone	(724) 555-1234 (Home)
	(724) 555-9876 (Work)

At the bottom right of the main content area, there are two links: 'Change' and 'Edit'. A mouse cursor is pointing at the 'Edit' link.

## Changing a Customer

Once you add a customer to a deal, your only option is to use the **Change** link to search for and select another customer to add to the deal. This is the only way to remove a customer from a deal.

## Adding Vehicle Insurance

The Insurance option is where you add the customer's vehicle insurance carrier. You added the insurance companies and insurance agents in the setup using the **Insurance Co** and **Insurance Agent** options, but you can also add new insurance companies while working on this screen, and the company will be added to the setup for future use.

1. Click **Insurance**.

The screenshot displays the 'Insurance' setup screen. On the left is a navigation menu with categories: Information, Applicant, Insurance, Vehicle, Trade, Activities, Up Forms, Desking, Front End, Taxes, Fees, Back Adds, Coverage, Life A&H, Inception, Mileage, Roll, Integrations, and Menu. The main content area is titled 'Retail - Working - 010001'. It features two dropdown menus for 'Insurance Company' and 'Insurance Agent', each with a green '+' icon to add new entries. To the right are input fields for 'Policy Number', 'Effective Date', and 'Expiration Date'. Below these are checkboxes for 'Collision Deductible' (set to 0.00), 'Comprehensive Deductible' (set to 0.00), and 'Fire/Theft'. A 'Save' button is located at the bottom right of the form.

2. Use the **Insurance Company** list to select the insurance company. The list includes all companies added to the system setup. If the company you need is not in the list, click the green **+** to add a company from this screen. Type the insurance company name, and click **Save**. The company will now appear in the list. The company is also added to the setup.
3. Use the **Insurance Agent** list to select the insurance agent company. The list includes all agents associated with the selected insurance company that have been added to the system setup. If the agent you need is not in the list, click the green **+** to add an agent from this screen. Type the insurance agent's information, and click **Save**. The agent will now appear in the list. The agent is also added to the setup. You can also use the **Edit Agent** link to edit the agent's information.
4. Type the policy number.

- For the effective date and expiration date, type the date, or use the calendar that appears to select the date.

The screenshot displays a date selection interface. At the top, there is a section titled "Effective Date" with a text input field containing "09/06/2012". Below this is a section titled "Expiration Date" with an empty text input field. Underneath the input fields is a calendar widget for "September 2013". The calendar shows a grid of days from Sunday to Saturday. The days are numbered 1 through 30. A mouse cursor is pointing at the number "6" in the first row, which is a Friday.

- If the customer has a collision deductible, click to select the **Collision Deductible** box, and add the deductible amount.
- If the customer has a comprehensive deductible, click to select the **Comprehensive Deductible** box, and add the deductible amount.
- If the customer has a fire or theft coverage, click to select the **Fire/Theft** box.
- Click **Save** to save the information.

## Adding a Vehicle to the Deal

You have the option of adding a vehicle to the deal using the **Vehicle** screen or on the **Desking** screen. The advantage of adding a vehicle using the **Vehicle** screen is that it allows you to search for all the vehicle in your inventory that meet specific criteria. You can then view the vehicle information. Adding a vehicle on the **Desking** screen limits you to simply scrolling through an inventory list and selecting a vehicle. (Please see "Desking a Deal" for information about adding a vehicle to a deal using the **Desking** screen.)

## Adding a Vehicle using the Vehicle Screen

1. Click **Vehicle**.
2. The default search fields that display are based on the **Default Inventory View** setting on the Finance Info screen in the Admin section. Type the search criteria or filter criteria you want to use, and click **Filter** or **Search**.
3. The bottom of the screen lists the vehicles in inventory that meet the specified criteria.

Matz x Smith x +

Retail - Working - 010001

Information Applicant Insurance Vehicle Trade Activities Up Forms Desking Front End Taxes Fees Back Adds Coverage Life A&H Inception Mileage Roll Integrations Menu

Status: [Dropdown] Begin Year: [Dropdown] Make: Chevrolet [Dropdown] Color: [Dropdown] Min Price: [Text Box]

Type: [Dropdown] End Year: [Dropdown] Model: Cruze [Dropdown] Max Price: [Text Box]

Filter Clear Filter

Stock #	Type	Status	Year	Make	Model	Trim	Body	Color	Price
BF005	New	In Inventory	2012	Chevrolet	Cruze	LTZ			\$25,000.00
BF008	Used	In Inventory	2011	Chevrolet	Cruze				\$15,000.00
C0007	New	In Inventory	2011	Chevrolet	Cruze	LS			\$23,995.99

Page 1 of 1 5 View 1 - 3 of 3

4. Double-click the vehicle in the list you want to select. The vehicle detail displays, and the vehicle is added to the deal.

Matz x Smith x +

Remove Retail - Working - 010001

Information Details Options Pricing Manufacturer Data Repair Orders

Inventory Item Information

Stock Number: C0007  
MSRP: \$23,995.99  
Days On Lot: 861

Type: New Status: In Inventory

VIN: [Text Box]

Year: 2011

Make: Chevrolet

Model: Cruze

Trim: LS

Body: [Text Box]

Exterior Color: [Text Box]

Interior Color: [Text Box]

Odometer: 100 Actual Miles [Dropdown]

Save

## Removing a Vehicle from a Deal

1. Click **Vehicle**.
2. The vehicle information displays.
3. Click **Remove**.
4. Click **Yes** when prompted to verify you want to remove the vehicle from the deal.

The screenshot shows a web application interface for vehicle management. A dialog box titled "Vehicle Confirmation" is open in the center, asking "Are you sure you want to remove this vehicle from the deal?" with "Yes" and "No" buttons. The background form displays "Inventory Item Information" for a vehicle with Stock Number C0007, MSRP \$23,995.99, and VIN 14141414141414141. Other fields include Type (New), Status (In Inventory), Year (2011), and Odometer (100).

5. The program displays the search fields so you can search for another vehicle.

The screenshot shows the search and inventory list interface. Search filters include Status, Begin Year, Make, Color, Min Price, Type, End Year, Model, and Max Price. Below the filters is an "Inventory" table with columns for Stock #, Type, Status, Year, Make, Model, Trim, Body, Color, and Price.

Stock #	Type	Status	Year	Make	Model	Trim	Body	Color	Price
12345	New	In Inventory	2011	Chevrolet	Colorado	LT Truck	Ext. Cab	Black	\$25,000.00
20191	New	In Inventory	2011	Chevrolet	Silverado K1500	LT	Truck	Black Granite	\$40,505.00
20325	New	In Inventory	2010	Chevrolet	Aveo	LT	SDN	Blue	\$17,840.00
BF0010	New	In Inventory	2012	Chevrolet	Silverado		Crew	Red	\$38,715.00
BF0020	Used	In Inventory	2006	Jeep	Grand Cherokee		4DR	Green	\$15,980.00

## Adding a Trade to the Deal

Use the **Trade** option to add details for the trade vehicle. There can be multiple trade vehicles for a deal. Although the trade detail must be entered here, the trade allowance and trade payoff can be entered directly on the Desking screen of the deal.

1. Click **Trade**.
2. Click **Add New**.

3. Under **Vehicle Information**, add the vehicle's information.
4. If you added a vehicle to the deal and selected to have the program automatically assign stock numbers to trade vehicle, the **Stock** field fills in with the assigned stock number. The stock numbering used will depend on the trade stock numbering option you selected in the **Finance Info** in the setup.
  - If selected the **ABC** as the trade stock numbering option, the stock number consists of the selling car's stock number with an alpha character suffix (starting with A for Trade 1 in a deal and M for Trade 2 in a deal).
  - If you selected the **Last Six of VIN** as the trade stock numbering option, the stock number will be the last six characters of the trade vehicle's VIN.
  - If you selected **Manual** as the trade stock numbering option, you will need to assign a stock number to the trade vehicle.
5. If a make, model, trim, or color does not appear in the list, click the green **+** to add a new entry to the list from this screen.

**Tip:** Once you type the VIN, you can click **Decode** to use the VIN decoder to fill in the year, make, and model for the vehicle.

6. Under **Financial Information**, enter the pricing details for the trade. The Trade Allowance and Trade Payoff will display on the **Desking** screen.
7. The **Lien Holder** section allows you to add information for the lien holder. Use the **Lien Holder** list to select the lien holder. The list includes all trade lien holders added to the system setup. If the lien holder you need is not in the list, click the green **+** to add a lien holder from this screen. Type the lien holder's information, and click **Add**. The lien holder will now appear in the list. The lien holder is also added to the setup. Add the term and Payment.
8. Click **Save**.
9. Repeat steps 2-8 for each trade in the deal.

## Removing a Trade

1. Click **Trade**.
2. Click the red **X** next to the trade.
3. Click **Continue** when prompted to verify you want to remove the trade.

## Viewing Activities

The Activities link allows you to track the activity with the Up. This includes notes about conversations, meetings, etc. that have taken place so you have a running record of contact. The notes you add here will also be added to the customer notes attached to the customer's record.

Activity	Description	Owner	Date
Note	We ran basic numbers today to give Steve an idea of the...	Andrea Harvey	03/15/2013 01:01 PM EST

## Adding Notes

1. Click **Add Note**.
2. Type the note.



**Enter Note**

We worked basic numbers today to give Steve an idea of the payment. He is returning Friday to test drive different models to see which one he prefers so we can start crunching numbers on an actual deal.

Save

3. Verify the information is correct. *You **cannot** edit a note once you add it.*
4. Click **Save**.
5. The note appears in the Activities list.

## Printing Up Forms

The Up Forms display the forms available for printing. They range from a “4 Square” form used as a worksheet to work numbers for the deal to deal disclosure forms you are required by law to provide the customer.

1. The left side of the screen lists the available forms.
2. Click the form name you want to generate. (You can also click the PDF icon on the right to view the form in a PDF viewer.)
3. The form displays on the screen.
4. Use the toolbar to view and print the form as needed.



## Understanding the Basic Process

1. Click **Desking**.
2. The **Deal Type** defaults to the type selected in the setup. Use the list to select a different deal type as needed. The deal type determines the fields that display, so it is important to ensure you select the correct deal type.

Matz x Smith x +

Information: C0007 - 2011 Chevrolet Cruze LS | Change | Ready for Finance | Retail - Working - 010001

Applicant: Selling Price: 23,995.99 | APR: 6.990 % | Term: 60 | Payment Type: Monthly | Roll

Vehicle: Purchase Date: 01/07/2014 | Effective APR: 6.990 % | Days to First Pay: 30 | Payment Date: 02/06/2014

Trade: Deal Type: Retail | State: PA

Activities: Lender: No Bank Selected

Up Forms: Memo

APR	54 Mo	60 Mo	66 Mo
5.990%	513.34	468.63	432.10
6.990%	524.60	479.98	443.55
7.990%	536.02	491.50	455.17

Inception	Financed
0.00	Selling Price 23,995.99
0.00	Front Adds 0.00
270.00	Taxes 1,349.76
	Fees 400.00
	Subtotal 25,745.75
270.00	Cash Rebates - 0.00
0.00	Trade Allowance 1,500.00
	Trade Payoff 0.00
1,500.00	Total 24,245.75
1,770.00	
270.00	Cash From Customer

Buttons: Cancel Save

**Retail Desking**

Matz x Smith x +

Information: C0007 - 2011 Chevrolet Cruze LS | Change | Ready for Finance | Lease - Working - 010001

Applicant: Selling Price: 23,995.99 | Money Factor: 0.00000000 | Term: 0 | Payment Type: Monthly | Roll

Vehicle: Purchase Date: 01/07/2014 | Days to First Pay: 30 | Payment Date: 02/06/2014

Trade: Deal Type: Lease | State: PA

Activities: Lender: No Bank Selected

Up Forms: Memo

Monthly
Payment \$ 0.00

Inception	Financed	Residual
0.00	Selling Price 23,995.99	MSRP 23,995.99
0.00	Front Adds 0.00	MSRP Adds 0.00
270.00	Taxes 0.00	Package Discounts 0.00
	Fees 400.00	Residualized Amount 23,995.99
	Payment	Residual % 0.00
270.00	Subtotal 24,395.99	Base Residual 0.00
0.00	Cash Rebates - 0.00	Mileage Adjustment 0.00
0.00	Trade Allowance 1,500.00	Total Residual 0.00
0.00	Trade Payoff 0.00	
270.00	Total 22,895.99	
270.00	Cash From Customer	

Buttons: Cancel Save

**Lease Desking**

Matz x Smith x +

C0007 - 2011 Chevrolet Cruze LS Change Ready for Finance Cash - Working - 010001

Selling Price  Roll

Purchase Date

Deal Type  State

Lender

Memo

Selling Price	23,995.99
Front Adds	0.00
Taxes	1,349.76
Fees	670.00
<b>Subtotal</b>	<b>26,015.75</b>
Cash	- 0.00
Rebates	0.00
<input type="text" value="0.00"/>	0.00
Trade Allowance	
<input type="text" value="1,500.00"/>	
Trade Payoff	-1,500.00
<b>Total</b>	<b>24,515.75</b>

Cancel Save

**Cash Desking**

Matz x Smith x +

C0007 - 2011 Chevrolet Cruze LS Change Ready for Finance Wholesale - Working - 010001

Selling Price  Roll

Purchase Date

Deal Type  State

Memo

Selling Price	23,995.99
Front Adds	0.00
Taxes	0.00
Fees	400.00
<b>Subtotal</b>	<b>24,395.99</b>
<b>Total</b>	<b>24,395.99</b>

Cancel Save

**Wholesale Desking**

**Smith** | C0007 - 2013 Chevrolet Cruze LS | Change | Ready for Finance | Balloon - Working - 010001

Selling Price: 23,995.99 | APR: 6.990% | Term: 60 | Payment Type: Monthly | Roll

Purchase Date: 03/15/2013 | Effective APR: 6.990% | Days to First Pay: 30 | Payment Date: 04/14/2013

Deal Type: Balloon | State: PA | Lender: No Bank Selected

Monthly	
59 Payments	\$ 484.17
Final Payment	\$ 0.00
Finance Charge	\$ 4,450.28
Total of Payments	\$ 28,566.03
Total Down	\$ 1,500.00
Total Sales Price	\$ 30,066.03

**Inception**

0.00	Selling Price	23,995.99
0.00	Front Adds	0.00
0.00	Taxes	1,349.76
400.00	Fees	270.00
<b>Subtotal</b> 25,615.75		
0.00	Cash Rebates	0.00
1,500.00	Trade Allowance	1,500.00
1,900.00	Trade Payoff	-1,500.00
<b>Total</b> 24,115.75		

**Residual**

MSRP	23,995.99
MSRP Adds	0.00
Package Discounts	0.00
<b>Residualized Amount</b>	23,995.99
Residual %	0.00
Base Residual	0.00
Mileage Adjustment	0.00
<b>Total Residual</b>	0.00

Buttons: Cancel, Save

### Balloon Desking

**Tip:** The Gross information on the bottom right side of the Desking screen is initially hidden. Click to select the box to display the gross.

- The state for the deal defaults to the default state selected in the setup. However, if you selected to use the ZIP decoder and added an applicant to the deal, the state will fill in based on the applicant's ZIP code.
- If no vehicle has been added to the deal, click **Change**, and use the vehicle list to select a vehicle.

C0007 - 2013 Chevrolet Cruze LS

- BF006 - 2012 Chevrolet Impala LTZ
- BF007 - 2011 Chevrolet Impala LTZ
- BF008 - 2011 Chevrolet Cruze
- C0001 - 2011 Chevrolet Corvette Z06
- C0002 - 2011 Chevrolet Tahoe LTZ
- C0006 - 2011 Chevrolet Cobalt
- C0007 - 2013 Chevrolet Cruze LS**
- C0008 - 2011 Chevrolet HHR

- Enter the information required for each field.

6. Add additional information using the options on the left side of the screen, or by using the links on the **Desking** screen.
7. Once all of the vehicle sale information is complete and the deal is ready to go to the Finance Department, click **Ready for Finance**.

8. The finance options on the left side of the screen are now available, and additional fields will display on the screen. Remember, only users with access rights will be able to see this information. The Finance representative will add additional information to the deal (Back Adds, Coverage, and Life A&H). The deal status will change to **Finance**.

APR	54 Mo	60 Mo	66 Mo
5.990%	547.00	499.36	460.43
6.990%	559.01	511.46	472.63
7.990%	571.17	523.73	485.02

Inception		Financed	
0.00	Selling Price	23,995.99	
0.00	Front Adds	0.00	
270.00	Taxes	1,439.76	
0.00	Fees	400.00	
0.00	Back Adds	0.00	
0.00	Service	0.00	
0.00	Gap	0.00	
0.00	Life A&H	0.00	
270.00	Subtotal	25,835.75	
0.00	Cash	0.00	
0.00	Rebates	0.00	
0.00	Trade Allowance	0.00	
0.00	Trade Payoff	0.00	
270.00	Total	25,835.75	
270.00	Cash From Customer		

**Tip:** Once a deal is sent to Finance, the **Ready for Finance** link becomes a **Roll Back to Working** link. The deal can be sent back to a “Working” status by clicking this link. This restricts access to the finance options.

9. Once all the information has been added to the deal, use the **Deal Forms** screen to print the necessary forms.
10. You can view the gross for the deal using the **Recap** screen. You will use the **Mark as Sold** link on this screen to flag the deal as complete and the vehicle as sold.
11. When the deal is ready to be sent to Accounting, click **Deal Finished** on the Recap screen. This flags the deal as finished.

## Front End

Use this option to apply discounts to the selling price and to add front adds to the deal. You can access this screen by clicking **Front End** under **Desking** or by clicking the **Selling Price** and **Front Adds** links on the **Desking** screen. If you make any changes, make sure you click **Save** to save the changes.

The **Base Selling Price** displays the MSRP for the vehicle. If you add an amount in the **Discount** field, the Net Selling Price will adjust to reflect the discount amount. This amount will now display as the **Selling Price** on the **Desking** screen.

If you need to add Front Adds, click the green **+**. Use the **Name** list to select the item. The lists displays all front adds that were added to the setup. The information that displays pulls from the information added in the setup for this item. You can edit any field as needed. Click the red **X** next to an item to remove it. The total for the front adds you add will display next to **Front Adds** on the **Desking** screen.

If you need to add a front add that does not appear in the list, click the green **+** next to the Name drop-down list. You can then type the name of the front add and add the pricing information. The front add is saved for this deal only, and is not added to the Front Adds setup.

Name	Retail	Cost	Pmt	State Tax
Mud Flaps	150.00	50.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	0.00	0.00	<input type="checkbox"/>	<input type="checkbox"/>

## Taxes

You can access this screen by clicking **Taxes** under **Desking** or by clicking the **Taxes** link on the **Desking** screen. The taxes applied to the deal are based on the state you select on the **Desking** screen. The tax added to the deal is based on the taxing in the setup for the state. You can view and edit the details for the taxing here. Tax for any taxable items added to the deal will also display on this screen. If you make any changes, make sure you click **Save** to save the changes. The total taxes applied to the deal display next to **Taxes** on the **Desking** screen.

Matz x Smith x + Retail - Finance - 010001

Information  
Applicant  
Insurance  
Vehicle  
Trade  
Activities  
Up Forms

Desking  
Front End  
Taxes  
Fees  
Back Adds  
Coverage  
Life A&H  
Inception  
Mileage  
Roll  
Integrations  
Menu  
Deal Forms  
Recap  
Gross  
Commission

**Taxes - Pennsylvania**

	State Tax	
Tax Rate	6.000000%	
Alt Tax Rate	0.000000%	

Payment  
Additional Tax 0.00

**Financed Taxes**

	State Tax	Alt Tax Rate
Vehicle	1,439.76	1,439.76
Mud Flaps	9.00	9.00
<b>Total</b>	<b>1,448.76</b>	<b>1,448.76</b>
Additional Tax		0.00
<b>Total Financed Tax</b>		<b>1,448.76</b>

**Inception Taxes**

	State Tax	
Total	0.00	0.00
Additional Tax		0.00
<b>Total Inception Tax</b>		<b>0.00</b>

**Total Taxes**

<b>Total Tax</b>	<b>1,448.76</b>
------------------	-----------------

Cancel Save

Retail Tax Screen

Matz x Smith x + Lease - Finance - 010001

Information  
Applicant  
Insurance  
Vehicle  
Trade  
Activities  
Up Forms

Desking  
Front End  
Taxes  
Fees  
Back Adds  
Coverage  
Life A&H  
Inception  
Mileage  
Roll  
Integrations  
Menu  
Deal Forms  
Recap  
Gross  
Commission

**Taxes - Pennsylvania (Monthly)**

	State Tax	
Tax Rate	0.000000%	
Alt Tax Rate	0.000000%	
Monthly Tax		0.00

Payment  
Tax On Cap Reduction   
Additional Tax 0.00

**Financed Taxes**

	State Tax	
Tax On Cap Reduction	0.00	0.00
<b>Total</b>	<b>0.00</b>	<b>0.00</b>
Additional Tax		0.00
<b>Total Financed Tax</b>		<b>0.00</b>

**Inception Taxes**

	State Tax	
Tax On Cap Reduction	0.00	0.00
<b>Total</b>	<b>0.00</b>	<b>0.00</b>
Additional Tax		0.00
<b>Total Inception Tax</b>		<b>0.00</b>

**Total Taxes**

<b>Total Tax</b>	<b>0.00</b>
------------------	-------------

Cancel Save

Lease Tax Screen

Matz x Smith x + Cash - Finance - 010001

Information  
 Applicant  
 Insurance  
 Vehicle  
 Trade  
 Activities  
 Up Forms

---

Desking  
 Front End  
 Taxes

Fees  
 Back Adds  
 Coverage  
 Life A&H  
 Inception  
 Mileage  
 Roll

Integrations  
 Menu

---

Deal Forms  
 Recap  
 Gross  
 Commission

**Taxes - Pennsylvania**

	State Tax		
Tax Rate	6.000000%		
Alt Tax Rate	0.000000%		Alt Tax Rate
Vehicle	1,439.76	1,439.76	
Mud Flaps	9.00	9.00	<input type="checkbox"/>
<b>Total</b>	<b>1,448.76</b>	<b>1,448.76</b>	
<b>Additional Tax</b>		0.00	
<b>Total Tax</b>		<b>1,448.76</b>	

**Cash and Wholesale Tax Screen**

Matz x Smith x + Balloon - Finance - 010001

Information  
 Applicant  
 Insurance  
 Vehicle  
 Trade  
 Activities  
 Up Forms

---

Desking  
 Front End  
 Taxes

Fees  
 Back Adds  
 Coverage  
 Life A&H  
 Inception  
 Mileage  
 Roll

Integrations  
 Menu

---

Deal Forms  
 Recap  
 Gross  
 Commission

**Taxes - Pennsylvania**

	State Tax		
Tax Rate	6.000000%		
Alt Tax Rate	0.000000%		Alt Tax Rate

---

**Financed Taxes**

	State Tax		
Vehicle	1,439.76	1,439.76	
Mud Flaps	9.00	9.00	<input type="checkbox"/>
<b>Total</b>	<b>1,448.76</b>	<b>1,448.76</b>	
<b>Additional Tax</b>		0.00	
<b>Total Financed Tax</b>		<b>1,448.76</b>	

---

**Inception Taxes**

	State Tax		
<b>Total</b>	0.00	0.00	
<b>Additional Tax</b>		0.00	
<b>Total Inception Tax</b>		0.00	

---

**Total Taxes**

<b>Total Tax</b>		<b>1,448.76</b>	
------------------	--	-----------------	--

**Balloon Tax Screen**

## Fees

You can access this screen by clicking **Fees** under **Desking** or by clicking the **Fees** link on the **Desking** screen. The fees added to the deal are based on the state you select on the **Desking** screen. The fees added to the deal are also based on the fees in the setup for the selected bank. Therefore, the fees displayed on this screen will vary by bank and deal type. You can view and edit the details for the fees here. If you make any changes, make sure you click **Save** to save the changes. The total fees applied to the deal display next to **Fees** on the **Desking** screen.

Matz
Smith
+

Retail - Finance - 010001

- Information
- Applicant
- Insurance
- Vehicle
- Trade
- Activities
- Up Forms
- Desking**
- Front End
- Taxes
- Fees
- Back Adds
- Coverage
- Life A&H
- Inception
- Mileage
- Roll
- Integrations
- Menu
- Deal Forms
- Recap
- Gross
- Commission

Local Fees - Pennsylvania (Default)

	Amount	Payment	<input type="checkbox"/>
Documentary Fee	100.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Lien Fee	90.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Tire Fee	80.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Messenger Fee	70.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Online Fee	60.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<b>Total</b>	<b>400.00</b>		

Licensing Fees

	Amount	Payment	
License	70.00		Plate Issued <input style="width: 80%;" type="text"/>
Registration	60.00		Permit Number 1 <input style="width: 80%;" type="text"/>
Certificate of Title	50.00		Permit Number 2 <input style="width: 80%;" type="text"/>
Transfer	40.00		Permit Number 2 Date <input style="width: 80%;" type="text"/>
Increase	30.00		
Notary	20.00		
Temp Tag	0.00		
<b>Total</b>	<b>270.00</b>	<input type="checkbox"/>	

**Total Fees** 670.00

## Back Adds

This option is only available when a deal has been sent to Finance. You can access this screen by clicking **Back Adds** under **Desking** or by clicking the **Back Adds** link on the **Desking** screen. This is where you add back adds to the deal.

To add a back add, click the green +. Use the **Back Add Type** list to select the category for the item. This determines which items displays in the **Name** list. The **Name** list only displays the items that were assigned the selected Back Add Type on in the Back Adds setup. The retail amount, cost, and taxing pull from the information added in the setup for this item.

You can edit any field as needed. Click the red X next to an item to remove it. The total for the back adds you add will display next to **Back Adds** on the **Desking** screen.

Back Add Type	Name	Retail	Cost	Pmt	Taxing
Interior Protection	Fabric & Leather	230.00	100.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Key Replacement		0.00	0.00	<input type="checkbox"/>	<input type="checkbox"/>
Total Additions		230.00			

Key Care

Cancel Save

## Coverage

This option is only available when a deal has been sent to Finance. You can access this screen by clicking **Coverage** under **Desking** or by clicking the **Service** and **GAP** links on the **Desking** screen. This is where you add additional coverage the customer will be purchasing. The customer can purchase additional service plans, warranty plans, maintenance plans, or GAP coverage.

Retail - Finance - 010001									
Service / Warranty / Maintenance									
Type	Provider	Plan Name			Payment	Stop On			
Maintenance	ABC Maintenance Corp	Silver Care			<input checked="" type="checkbox"/>	<input type="checkbox"/>			
Contract Number	Term	Mileage	Deductible	Disappearing	Retail	Cost			
	12	12,000	0.00	<input type="checkbox"/>	175.00	85.00			
Total Service / Warranty / Maintenance					175.00				
Guaranteed Asset Protection									
Provider	Plan Name			Retail	Cost	Payment	Stop On		
Northeast GAP	Basic GAP			695.00	195.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Contract Number									
<input type="button" value="Cancel"/> <input type="button" value="Save"/>									

To add plans, click the green **+**. For Service/Warranty/Maintenance, you must use the **Type** list to select the type of coverage you want to add: Service, Warranty, or Maintenance. Use the **Provider** list to select the coverage provider. The list displays all the coverage providers that were added to the setup. Next, use the **Plan** list to select the coverage plan. Again, these are all the coverage plans added to the setup for the selected provider. The information that displays pulls from the information added in the setup for the selected plan.

You can edit any field as needed. Click the red **X** next to an item to remove it. The total for the service, warranty, and maintenance plans will display next to **Service** on the **Desking** screen, while the total for any GAP coverage will display next to **GAP**.

## Life A&H

This option is only available when a deal has been sent to Finance. You can access this screen by clicking **Life A&H** under **Desking** or by clicking the **Life A&H** link on the **Desking** screen. This is where you add any life or accidental and health insurance the customer will be purchasing.

When you select a provider from the Provider list, the screen fills in with the defaults set for the selected provider in the setup. You can edit the information as needed.

The screenshot shows a software interface for configuring insurance. On the left is a navigation menu with categories like Information, Desking, and Deal Forms. The main area is titled 'Life, Accidental & Health Insurance' and contains several sections:

- Life Insurance:** Includes a 'Provider' dropdown menu, checkboxes for 'Applicant' and 'Co-Applicant', a 'Life Type' dropdown, and a 'Premium' field showing '0.00'.
- Accidental & Health Insurance:** Includes checkboxes for 'Applicant' and 'Co-Applicant', dropdowns for 'A&H Type', 'Days', and 'Critical Period', and a 'Premium' field showing '0.00'.
- Total Premium:** A summary row showing 'Total Premium' as '0.00' with an 'Override Premium' checkbox.

At the bottom right, there are 'Cancel' and 'Save' buttons. The top right corner of the window displays 'Retail - Finance - 010001'.

**Tip:** If Autosoft does not currently support calculations for a certain combination, you will see a “Provider’s calculation is currently unavailable” message at the top of the screen. In this event, you must contact Autosoft support for further assistance.

## Inception

This is where you add the cash and rebates that will be applied to the deal. Use the Cash section to add any cash with the deal. The total for any cash will display next to **Cash** on the **Desking** screen.

To add rebates, click the green **+**. Type the rebate information. Click the red **X** next to a rebate to remove it. The total for the rebates will display next to **Rebates** on the **Desking** screen.

Matz x Smith x + Retail - Finance - 010001

Information  
Applicant  
Insurance  
Vehicle  
Trade  
Activities  
Up Forms

Desking  
Front End  
Taxes  
Fees  
Back Adds  
Coverage  
Life A&H

**Cash**

Cash Down	0.00
Cash Deposit	0.00
Deferred Cash	0.00
Deferred Days	0
<b>Total Cash</b>	0.00

**Rebates** +

Cancel Save

**Balloon, Cash, and Retail Inception**

Matz x Smith x + Lease - Finance - 010001

Information  
Applicant  
Insurance  
Vehicle  
Trade  
Activities  
Up Forms

Desking  
Front End  
Taxes  
Fees  
Back Adds  
Coverage  
Life A&H  
Inception  
Mileage  
Roll  
Integrations

**Cash**

Cash Cap Reduction	0.00
<b>Total Cash</b>	0.00

**Rebates** +

**Lease Payment**

Base Payment	0.00
Monthly Tax	0.00
<b>Total Payment</b>	0.00

Waive First Payment

Cancel Save

**Lease Inception**

## Mileage

For lease deals, you will add the mileage details here. The information you add here displays next to **Mileage Adjustment** on the **Desking** screen. The mileage affects the residual for the lease.

The screenshot shows a software window titled "Matz" and "Smith" with a sub-window for "Lease - Finance - 010001". The "Mileage" section includes fields for "Standard Miles Per Year", "Total Miles", and "Per Mile Over Charge". Below this is the "Mileage Adjustments" section with a table:

Existing Miles	100	
Miles Over Threshold	0	<input type="checkbox"/> From Zero
Miles Adjusted	100	
Per Mile Adjustment Charge	x 0.00	
<b>Total Existing Miles Adjustment</b>		0.00
Total Extra Miles	0	
Per Extra Mile Purchased Charge	x 0.00	
<b>Total Purchased Miles Adjusted</b>		0.00
		Refund Per Extra Mile 0.00
<b>Total Miles Adjustment</b>		0.00

Buttons for "Cancel" and "Save" are located at the bottom right.

## Rolling

Rolling allows you to hit target amounts as you work. You specify the target amount, and the program rolls the available numbers up or down to hit the target. You then select which roll you want to accept, and the program edits the deal accordingly. Rolling is only available for retail, lease, and cash deals, and the items you can roll vary by deal type.

### Rolling a Balloon or Retail Deal

1. Click **Roll**.
2. For retail deals, you can roll the amount financed, inception amount, or payment. Select the option from the drop down list.

The screenshot shows a software window titled "Matz" and "Smith" with a sub-window for "Retail - Finance - 010001". A dropdown menu is open, showing options: "Payment", "Amount Financed", "Inception", and "Target Amount". The "Payment" option is selected, and its value is shown as \$396.11. Below the dropdown are "Clear" and "Roll" buttons. To the right is a table with financial data:

	Amount Before	Amount After	Gross Before	Gross After	
Cash	\$5,000.00	\$5,000.00	\$22,695.99	\$22,695.99	<a href="#">Submit</a>
Trade	\$1,500.00	\$1,500.00	\$22,695.99	\$22,695.99	<a href="#">Submit</a>
Selling Price	\$23,995.99	\$23,995.99	\$22,695.99	\$22,695.99	<a href="#">Submit</a>
APR	6.990 %	6.990 %	\$22,695.99	\$22,695.99	<a href="#">Submit</a>

A "Cancel" button is located at the bottom right.

3. The **Starting Amount** is the amount currently in the deal.
4. In **Target Amount**, type the target value.
5. Click **Roll**.
6. The roll will adjust the cash, trade, selling price, and APR to hit the target amount.
7. The right side of the screen displays the values for the items in the deal that can be rolled to meet the target amount. It displays the amount and gross before the roll and after the roll.
8. Click **Submit** next to the roll you want to accept.
9. The program prompts you that the action will save the data and change the numbers of the deal. Click **Yes** to continue.
10. The deal will reflect the roll.

### Rolling a Lease Deal

1. Click **Roll**.
2. For lease deals, you can only roll the cash down.
3. The roll will adjust the rebate, trade, and cash to hit the target amount. Use the drop-down lists on the right to select the order in which you want the items rolled: 1, 2, and 3. The program will start with the item flagged as 1 and roll it as much as possible before moving on to items 2 and 3.

	Total Amount	Incept Reduction	Cap Cost Reduction	
Rebate	\$0.00	\$0.00	\$0.00	▼
Trade	\$1,500.00	\$0.00	\$1,500.00	▼
Cash	\$5,000.00	\$0.00	\$5,000.00	▼

4. Click **Roll**.
5. The right side of the screen displays the values for the items in the deal that can be rolled to meet the target amount. It displays the amount and gross before the roll and after the roll.
6. Click **Save**.
7. The deal will reflect the roll.

## Rolling a Cash Deal

1. Click **Roll**.
2. For cash deals, you can only roll the cash amount.

Total Cash Amount		Amount Before	Amount After	Gross Before	Gross After	
Starting Amount	\$20,279.05					
Target Amount	20,279.05					
Cash	\$5,000.00	\$5,000.00	\$22,695.99	\$22,695.99		<a href="#">Submit</a>
Trade	\$1,500.00	\$1,500.00	\$22,695.99	\$22,695.99		<a href="#">Submit</a>
Selling Price	\$23,995.99	\$23,995.99	\$22,695.99	\$22,695.99		<a href="#">Submit</a>

3. The **Starting Amount** is the amount currently in the deal.
4. In **Target Amount**, type the target value.
5. Click **Roll**.
6. The roll will adjust the cash, trade, and selling price to hit the target amount.
7. The right side of the screen displays the values for the items in the deal that can be rolled to meet the target amount. It displays the amount and gross before the roll and after the roll.
8. Click **Submit** next to the roll you want to accept.
9. The program prompts you that the action will save the data and change the numbers of the deal. Click **Yes** to continue.
10. The deal will reflect the roll.

**Tip:** In some instances, it is impossible to hit a target amount exactly. If the program is unable to hit the target amount, it will adjust the amount to the nearest penny.

## Integrations

The integrations available for your dealership are available here. Refer to the corresponding appendices at the end of this manual or the supplemental manufacturer integration documentation available from Autosoft for instructions on using various integrations.

## Printing Deal Forms

1. Click **Deal Forms**.
2. Click the form you want to print.
3. The form displays on the right side of the screen.
4. Use the toolbar to view and print the form as needed.

## Viewing the Recap

The **Recap** screen displays the breakdown of the gross and commission for the deal. This information is for viewing only. To edit information, return to the appropriate part of the deal, and edit the information.

		Front Commissions	Back Commissions	Reserve Commissions	Spiff	Total
Front Gross	\$22,695.99	\$5,499.00	\$82.00	\$0.00	\$0.00	\$5,581.00
Back Gross	\$820.00					
Total Gross	\$23,515.99	\$5,499.00	\$82.00	\$0.00	\$0.00	\$5,581.00

**Tip:** Only users with Dealer Principal, Finance Administrator, and Finance Restricted access rights can view and edit this screen.

## Finalizing the Deal

You also use this screen to finalize the deal. You cannot finalize a deal until you have assigned a Sales Manager and a Finance Manager to the deal. The program will display an error message if this information is missing from the deal.

1. Click the **Mark as Sold** link to flag the vehicle as sold. At this point, the deal status changes to "Sold."
2. A **Vehicle Sold** section displays at the bottom of the screen.

Vehicle Sold	
<input type="checkbox"/> Funded	
<input type="checkbox"/> Delivered	01/07/2014
<b>Deal Finished</b>	

3. Click to select the **Funded** and **Delivered** boxes if they apply, and use the date field to enter the appropriate date. If you select the **Delivered** box, the deal status changes to "Delivered."
4. Click **Deal Finished** to complete the deal. Click **Yes** when prompted to verify that you want to lock the deal for accounting. A deal will not be updated to Accounting until you complete this step. The deal status changes to "Finished."

## Viewing the Gross

The Gross screen displays a breakdown of the front and back gross. You can edit the **Cost** and **Reserve** sections, and you can add additional front and back adds by clicking the green +. Type a description and cost for the add. You can also choose to include or exclude items from the gross. Selected boxes will be included while blank boxes are excluded. Click to select a box. Click to clear a selected box.

Smith		Retail - Finance - 010001																																																																							
<b>Information</b> Applicant Insurance Vehicle Trade Activities Up - Forms Desking Front End Taxes Fees Back Adds Coverage Life A&H Inception Mileage Roll Integrations Menu Deal Forms Recap Gross Commission		<table border="1"> <thead> <tr> <th colspan="2">Front Gross</th> </tr> <tr> <th>Description</th> <th>Amount</th> </tr> </thead> <tbody> <tr> <td>Net Selling Price</td> <td>23,995.99</td> </tr> <tr> <td>Dealer Charges +</td> <td>100.00 <input checked="" type="checkbox"/></td> </tr> <tr> <td><b>Total Book -</b></td> <td>21,500.00</td> </tr> <tr> <td>Holdback -</td> <td>750.00</td> </tr> <tr> <td>Dealer Pack -</td> <td>0.00</td> </tr> <tr> <td>Advertising -</td> <td>0.00</td> </tr> <tr> <td>Trade Gross -</td> <td>1,500.00</td> </tr> <tr> <td><b>Subtotal =</b></td> <td>345.99</td> </tr> <tr> <td>Mud Flaps Gross +</td> <td>100.00</td> </tr> <tr> <td>Trade(s) ACV +</td> <td>1,750.00</td> </tr> <tr> <td>Dealer Bank -</td> <td>0.00</td> </tr> <tr> <td>Dealer Cash +</td> <td>0.00</td> </tr> <tr> <td>Holdback +</td> <td>750.00 <input checked="" type="checkbox"/></td> </tr> <tr> <td>Dealer Pack +</td> <td>0.00 <input checked="" type="checkbox"/></td> </tr> <tr> <td>Advertising +</td> <td>0.00 <input type="checkbox"/></td> </tr> <tr> <td><b>Total =</b></td> <td>2,945.99</td> </tr> <tr> <td><b>Add Adjustment +</b></td> <td></td> </tr> <tr> <td><b>Total Front Gross =</b></td> <td>2,945.99</td> </tr> </tbody> </table>	Front Gross		Description	Amount	Net Selling Price	23,995.99	Dealer Charges +	100.00 <input checked="" type="checkbox"/>	<b>Total Book -</b>	21,500.00	Holdback -	750.00	Dealer Pack -	0.00	Advertising -	0.00	Trade Gross -	1,500.00	<b>Subtotal =</b>	345.99	Mud Flaps Gross +	100.00	Trade(s) ACV +	1,750.00	Dealer Bank -	0.00	Dealer Cash +	0.00	Holdback +	750.00 <input checked="" type="checkbox"/>	Dealer Pack +	0.00 <input checked="" type="checkbox"/>	Advertising +	0.00 <input type="checkbox"/>	<b>Total =</b>	2,945.99	<b>Add Adjustment +</b>		<b>Total Front Gross =</b>	2,945.99	<table border="1"> <thead> <tr> <th colspan="2">Back Gross</th> </tr> <tr> <th>Description</th> <th>Amount</th> </tr> </thead> <tbody> <tr> <td>Fabric &amp; Leather Protection Gross +</td> <td>130.00</td> </tr> <tr> <td>Key Care Gross +</td> <td>100.00</td> </tr> <tr> <td>Silver Care Gross +</td> <td>90.00</td> </tr> <tr> <td>Basic GAP Gross +</td> <td>500.00</td> </tr> <tr> <td>Dealer Bank -</td> <td>0.00</td> </tr> <tr> <td><b>Subtotal =</b></td> <td>820.00</td> </tr> <tr> <td><b>RESERVE</b></td> <td></td> </tr> <tr> <td>Buy Rate</td> <td>0.000 %</td> </tr> <tr> <td>Participation</td> <td>0.00 %</td> </tr> <tr> <td><input type="checkbox"/> Reserve Override +</td> <td>0.00</td> </tr> <tr> <td><b>Total =</b></td> <td>820.00</td> </tr> <tr> <td><b>Add Adjustment +</b></td> <td></td> </tr> <tr> <td><b>Total Back Gross =</b></td> <td>820.00</td> </tr> </tbody> </table>	Back Gross		Description	Amount	Fabric & Leather Protection Gross +	130.00	Key Care Gross +	100.00	Silver Care Gross +	90.00	Basic GAP Gross +	500.00	Dealer Bank -	0.00	<b>Subtotal =</b>	820.00	<b>RESERVE</b>		Buy Rate	0.000 %	Participation	0.00 %	<input type="checkbox"/> Reserve Override +	0.00	<b>Total =</b>	820.00	<b>Add Adjustment +</b>		<b>Total Back Gross =</b>	820.00
Front Gross																																																																									
Description	Amount																																																																								
Net Selling Price	23,995.99																																																																								
Dealer Charges +	100.00 <input checked="" type="checkbox"/>																																																																								
<b>Total Book -</b>	21,500.00																																																																								
Holdback -	750.00																																																																								
Dealer Pack -	0.00																																																																								
Advertising -	0.00																																																																								
Trade Gross -	1,500.00																																																																								
<b>Subtotal =</b>	345.99																																																																								
Mud Flaps Gross +	100.00																																																																								
Trade(s) ACV +	1,750.00																																																																								
Dealer Bank -	0.00																																																																								
Dealer Cash +	0.00																																																																								
Holdback +	750.00 <input checked="" type="checkbox"/>																																																																								
Dealer Pack +	0.00 <input checked="" type="checkbox"/>																																																																								
Advertising +	0.00 <input type="checkbox"/>																																																																								
<b>Total =</b>	2,945.99																																																																								
<b>Add Adjustment +</b>																																																																									
<b>Total Front Gross =</b>	2,945.99																																																																								
Back Gross																																																																									
Description	Amount																																																																								
Fabric & Leather Protection Gross +	130.00																																																																								
Key Care Gross +	100.00																																																																								
Silver Care Gross +	90.00																																																																								
Basic GAP Gross +	500.00																																																																								
Dealer Bank -	0.00																																																																								
<b>Subtotal =</b>	820.00																																																																								
<b>RESERVE</b>																																																																									
Buy Rate	0.000 %																																																																								
Participation	0.00 %																																																																								
<input type="checkbox"/> Reserve Override +	0.00																																																																								
<b>Total =</b>	820.00																																																																								
<b>Add Adjustment +</b>																																																																									
<b>Total Back Gross =</b>	820.00																																																																								

**Tip:** Only users with Dealer Principal, Finance Administrator, and Finance Restricted access rights can view and edit this screen. Also, the Dealer Pack, Holdback, and Invoice amounts are only visible to users with permissions to view this information.

## Viewing Commission

The **Commission** screen displays a list of individuals who are receiving commission on the deal and the commission totals. Click an employee in the list to view the details and to edit the commission for the deal.

The initial salesperson on the deal is flagged Primary. This means that this is the primary salesperson for the deal. You can add another employee and set that employee as the primary commissionable employee by selecting the Primary box for that employee.

The **Commissionable** box determines if the employee gets commission for the deal. For the primary salesperson, this box is selected. If you clear this box, the commission calculations clear. If you add additional employees to the deal, you will need to indicate if the employee receives commission by selecting this box.

The commission values at the bottom of the screen are based on either the individual employee's commission setting set in the employee's setup record, or the general commissioning setup. You can edit the percentages or flat rates as needed.

The screenshot shows a software interface for viewing commission details. At the top, there is a tab labeled 'Smith' and a window title 'Retail - Finance - 010001'. On the left, there is a navigation menu with categories like Information, Desking, Integrations, and Deal Forms. The main content area is titled 'Employee' and contains a table with the following data:

Name	Title	Primary	Commission	Remove
Andrea Harvey	Salesperson	Yes	\$606.00	

Below the table, it shows 'Total Commission: \$606.00' and an 'Add New' button. Underneath is the 'Commissioning Options' section with checkboxes for 'Primary' (checked) and 'Commissionable' (checked). The 'Commissioning Information' section displays a calculation table:

Category	Value	Rate	Result	Subtotal
Front Commission Gross	2,095.99	25.00 %	= 524.00	524.00
Front Flat			= 75.00	
Back Commission Gross	820.00	10.00 %	= 82.00	82.00
Back Flat			= 65.00	
Reserve	0.00	50.00 %	= 0.00	0.00
Reserve Flat			= 0.00	
Spiff				0.00
<b>Total Commission</b>				<b>606.00</b>

At the bottom right, there is a 'Save' button.

**Tip:** Only users with Dealer Principal, Finance Administrator, and Finance Restricted access rights can view and edit this screen.

## Adding another Employee

By default, the individual who started the deal is the only employee set to receive commission. You can add additional individuals as needed.

1. Click **Commission**.
2. Click **Add New**.
3. Use the **Employee Type** list to select the job title.
4. Use the **Employee** list to select the employee.
5. Click **Save**. The employee appears in the list.
6. Click the employee. The commission information displays on the bottom of the screen.
7. Edit the commission.
8. Click **Save**.

## Removing an Employee

You can only remove an employee that was added for commissioning. You cannot remove the individual who originated the deal.

1. Click **Commission**.
2. Click the red **X** next to the employee.
3. Click **Continue** when prompted to verify you want to remove the employee.

## Marking a Lost Sale

Once you save a deal and it appears in the deal list, you need to mark the deal as a “lost deal” in order to remove it from the deals list. You will need to assign the deal a “lost reason” code entered in the setup.

1. Open the deal.
2. Click the **Mark as lost** link on the top-right side of the Information screen.



3. Use the lost reason list to select the reason for the lost sale.



4. Click **Save**.

## Reactivating a Lost Sale

Reactivating a sale removes the “Lost” status and returns it to “Working.”

1. Click **Deals**.
2. Select **Lost** in the **Status Type** list.
3. Use the remaining fields to filter the list even further as needed.
4. Click **Filter**.
5. The list displays the lost sales that meet your criteria.
6. Double-click the lost sale.
7. The deal opens to the Information screen.
8. Click the **Reactivate Deal** link on the top-left side of the screen.



9. Click **Continue** when prompted to verify you want to reactivate the deal.



## Desking a Deal without Adding a Customer

It is possible to work numbers for a potential deal without assigning a customer to the deal. The advantage of this is that it allows you to work numbers for a vehicle for a customer who wants to get an idea of pricing before actually working a deal. You cannot add any finance information to a deal when it is in this state. Also, until you assign a customer to a deal, the deal will not be saved in the program. Deals without customers are treated as worksheets that will be deleted once you choose to close the deal. The program will warn you that the deal will be deleted if you attempt to close it at this point.

1. Click **Deals**.
2. Click **New**.
3. Type a name for the deal, and click **Add**.
4. A blank desk opens.
5. Add vehicle.
6. Select deal type. The fields that display on the **Desking** screen vary based on the deal type.
7. For Retail and Lease deals, select the bank information and adjust the terms.
8. Add Front End, Taxes, Fees, Inception, and Mileage (for leases) information as needed.
9. As you add and save information, the **Desking** screen adjusts to reflect the information.

**Tip:** Remember, the desk will remain open in your Deals until you click the x on the tab to close it. If you close a desk, you will lose the information.

## Viewing Multiple Deals

You can have six deals open at a time. They display as tabs with the deal name assigned when creating the deal. When you click the + on the free tab, the Deals list displays. You have the option of selecting a deal from the list or creating a new desk.

The screenshot shows the Autosoft Dealer Management System interface. At the top, there is a navigation bar with the following elements: the Autosoft logo, the text "ABC Motors", the user name "AsiAdmin | Admin", and a "Logout" link. Below the navigation bar is a menu with tabs for "Dashboard", "Customers", "Deals", "Inventory", and "Reporting". The "Deals" tab is currently selected. Below the menu, there is a row of tabs representing open deals: "Matz", "Smith", "Hardney", "Bowers", and a plus sign (+) to add a new deal. Below the tabs is a search and filter section with the following fields: "Deal Type" (set to "All"), "Deal Status" (set to "Active"), "Deal Source" (empty), "Start Purchase Date" (set to "01/01/2014"), "End Purchase Date" (set to "02/28/2014"), and "Employee" (set to "All"). At the bottom right of the search section, there are checkboxes for "Advanced Search" and buttons for "Clear" and "Filter".

## Understanding Deal Status

The deal status is an important piece of information that identifies where the sales opportunity is in the process. While viewing the Deals list, the Status column will display six possible statuses depending on how you choose to sort the list:

- **Working:** Once an applicant is added to a desk, it becomes a working deal.
- **Finance:** The deal has been sent to Finance using the **Ready for Finance** link on the Desking screen.
- **Sold:** The deal has been flagged as sold using the **Mark as Sold** link on the Recap screen.
- **Delivered:** The deal has been flagged as delivered by selecting the **Delivered** box on the Recap screen.
- **Finished:** The deal has been finalized and updated to Accounting using the **Deal Finished** button on the Recap screen.
- **Lost.** The deal has been flagged as lost using the **Mark as Lost** link on the Information screen.

However, when you choose to sort the list based on the deal status, you have additional options to help you narrow the results down even further. The Deal Status sort options will sort the list as outlined below:

- **All:** This option displays all deal.
- **Active:** This option displays all Working and Finance deals. This is the default sort option.
- **Working:** This option displays only Working deals.
- **Finance:** option displays only Finance deals.
- **Sold:** This option displays all Sold, Delivered, and Finished deals.
- **Delivered:** This option displays all Delivered and Finished deals.
- **Finished:** This option displays all Finished deals.
- **Unfinished:** This option displays all Sold and Delivered deals. It allows you to quickly identify which deals need to be updated to Accounting.
- **Lost:** This option displays all Lost deals.
- **New:** This option displays new deals. This allows you to quickly display Web leads that have been added.

## Chapter 5 The Dashboard

The Dashboard is the first thing you see when you log on to the Finance program. It provides a screenshot of your activities and traffic. The information displayed depends on the user's access rights. Most of the tabs display graphs on the top of the screen and statistics on the bottom of the screen. The graphs provide a quick visual analysis of the information, while the statistics provide actual figures. The top of each tab provides fields you can use to filter the list as needed to access the information you want.

### Home

The **Home** tab is the default tab. It displays the current Deals list. Users with Sales Restricted access will only see their deals in this list. Users with Sales Administrator, Finance Restricted, Finance Administrator, and Dealer Principal access rights will see all deals in the list.

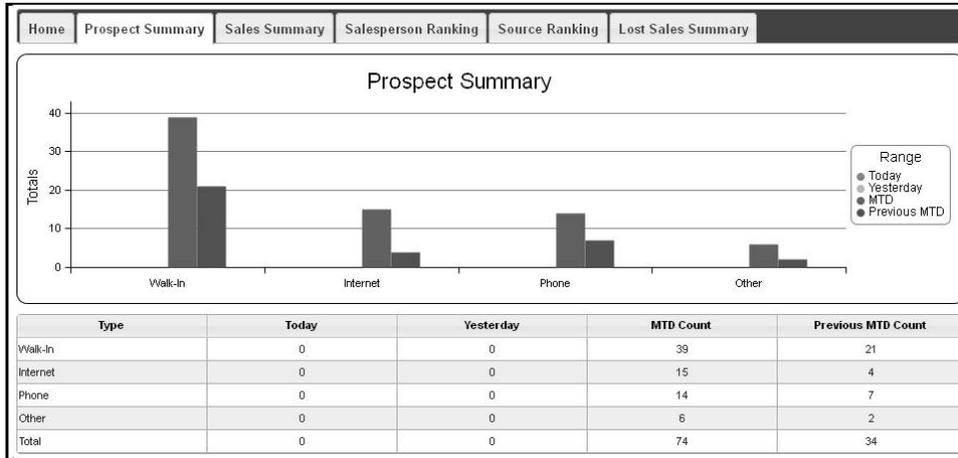
Home Prospect Summary Sales Summary Salesperson Ranking Source Ranking Lost Sales Summary										
New										
Deal Type	Deal Status	Deal Source	Start Purchase Date	End Purchase Date	Employee					
All	Active		03/01/2013	03/18/2013	All					
<input type="checkbox"/> Advanced Search <input type="button" value="Clear"/> <input type="button" value="Filter"/>										
Deal #	Status	Type	Customer	Stock #	Vehicle Information	Purchase	Activity	Source	Salesperson	Assignee
<a href="#">9</a>	Working	Cash	Bowers, William	CU001	2005 Chevrolet Impala	03/10/2013	03/13/2013	Mailer	Shopinsky	Shopinsky
<a href="#">14</a>	Working	Retail	Caraballo, Abel	CU005	2006 Honda Accord	03/14/2013	03/13/2013	Mailer	John	Shopinsky
<a href="#">100</a>	Working	Retail	Queens University of Charlotte	CU010	2006 SUBARU Impreza	03/10/2013	03/13/2013	Previous Customer	Taylor	Novotniak
<a href="#">105</a>	Working	Retail	Mercer County Police Department			03/10/2013	03/13/2013	Referral	Taylor	Novotniak
<a href="#">6</a>	Finance	Balloon	Matz, Chelsea			03/14/2013	03/13/2013	Previous Customer	Shopinsky	Taylor
<a href="#">10001</a>	Finance	Retail	Smith, Steve	C0007	2004 Chevrolet Cruze	03/15/2013	03/13/2013	Previous Customer	Harvey	
<a href="#">10002</a>	Working	Retail	DELINQUENT, DAVID			03/15/2013	03/15/2013	GM OneSource	Harvey	
<a href="#">26</a>	Finance	Lease	Araujo, Vinicius	C0008	2011 Chevrolet HHR	03/12/2013	03/15/2013	Previous Customer	Taylor	Shopinsky
<a href="#">5</a>	Working	Retail	Wisman, Kaysi	C0001	2011 Chevrolet Corvette	03/14/2013	03/15/2013	Referral	Taylor	Taylor
<a href="#">108</a>	Finance	Retail	Queens University of Charlotte	C0002	2011 Chevrolet Tahoe	03/14/2013	03/15/2013	GM OneSource	Taylor	Novotniak
<a href="#">104</a>	Working	Retail	Farrell School District	12345	2011 Chevrolet Colorado	03/10/2013	03/15/2013	Mailer	Taylor	Novotniak
<a href="#">103</a>	Working	Retail	Air Gas	20191	2011 Chevrolet Silverado K1500	03/10/2013	03/15/2013	GM OneSource	Taylor	Novotniak
<a href="#">101</a>	Working	Retail	El Arriero	C0002	2011 Chevrolet Tahoe	03/10/2013	03/15/2013	Service Customer	Taylor	Novotniak
<a href="#">21</a>	Finance	Retail	Araujo, Vinicius	C0001	2011 Chevrolet Corvette	03/08/2013	03/15/2013	Previous Customer	Taylor	Shopinsky
<a href="#">17</a>	Working	Cash	Haldane, Emmett			03/09/2013	03/15/2013	Referral	Shopinsky	Shopinsky
<a href="#">16</a>	Finance	Lease	Haynes, Joey	20191	2011 Chevrolet Silverado K1500	03/13/2013	03/15/2013	Service Customer	Shopinsky	Shopinsky
<a href="#">15</a>	Finance	Cash	Hardney, Adam			03/12/2013	03/15/2013	GM OneSource	Shopinsky	Shopinsky
<a href="#">13</a>	Working	Retail	Connelly, Ryan			03/08/2013	03/15/2013	Referral	Shopinsky	Daugherty
<a href="#">12</a>	Working	Lease	Payne, Margaret			03/13/2013	03/15/2013	Service Customer	John	Shopinsky
<a href="#">27</a>	Working	Retail	Smith, Andrew			03/14/2013	03/15/2013	Previous Customer	John	Taylor

Page 1 of 2    View 1 - 20 of 26

**Tip:** The system will save your last search, so if you leave this screen, the system will display the results of your last search when you return to the Home tab.

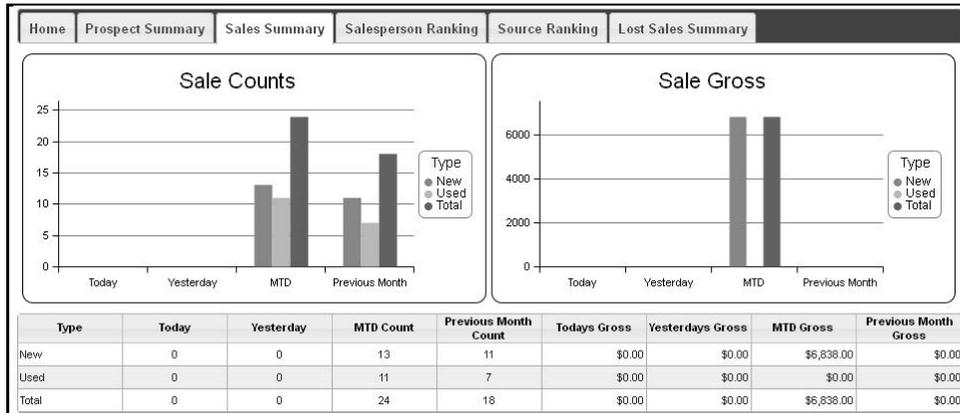
# Prospect Summary

The **Prospect Summary** is an overview of the prospects based on the up type: Walk In, Phone, Internet, and Other. These are assigned when you add an up to a deal. The information is broken down for today, yesterday, month-to-date, and previous month.



## Sales Summary

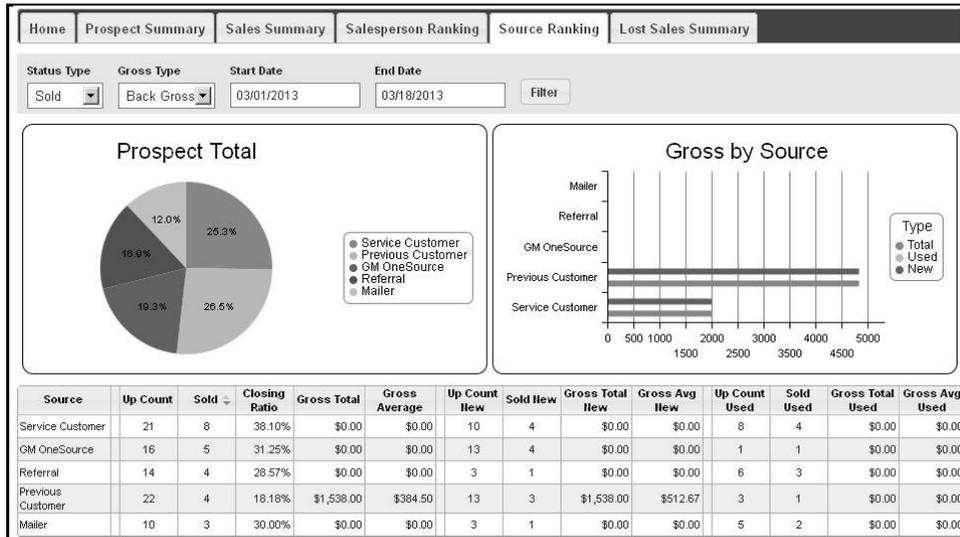
The **Sales Summary** provides sales counts and sales gross. The left side of the screen displays sale counts, and the right side of the screen displays sales gross. The information is broken down by vehicle type: new and used. The information is broken down for today, yesterday, month-to-date, and previous month.





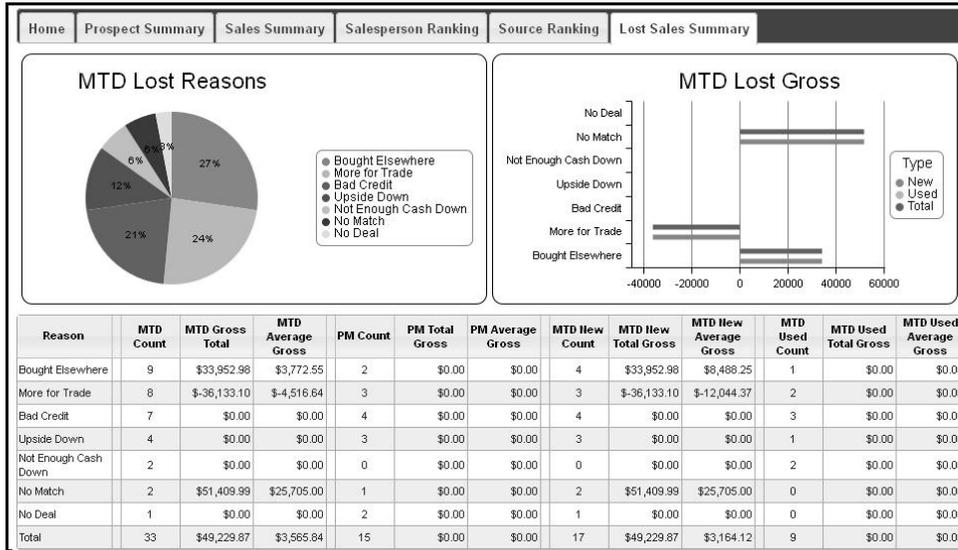
## Source Ranking

The **Source Ranking** displays information about the sources that brought customers into the dealership. The sources are added when adding an up to a deal. These are custom codes added to the system setup. This information can be useful when you want to evaluate your advertising sources.



## Lost Sale Summary

The **Lost Sale Summary** provides information about the lost sales. The lost sales codes were added in the setup and are assigned to deals when a deal has been created but will not be competed. This provides a look at your potential sales and the reasons for losing the sale so you can evaluate both the internal and external reasons that led to the lost sale. You can then use the information to make the necessary adjustments to your sales or inventory practices.

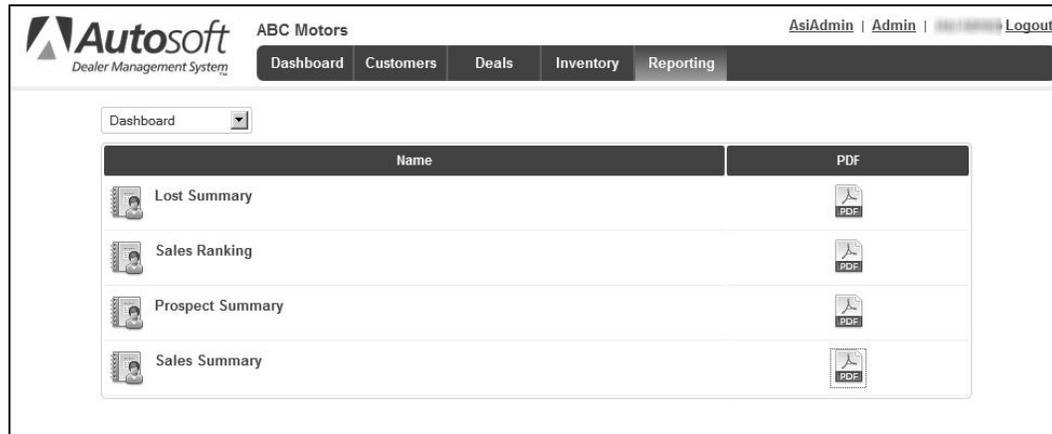


## Dashboard Reports

The Dashboard Reports link takes you to the Reporting screen and automatically selects to display the dashboard reports. Click a report link to generate the report. See Chapter 6 Reporting for more information about reports.

## Chapter 6 Reporting

The Reporting option allows you to generate reports for either your dashboard activities or inventory. The canned reports that come preloaded in the program provide a quick analysis of key areas of interest to track your traffic. They also ensure you have crucial inventory information available when you need it.



## Generating Reports

1. Click **Reporting**.
2. Use the type list to select if you want to generate dashboard or inventory reports.



3. Click the report you want to generate.

Name	PDF
Traffic by Deal Status	
Traffic by Up Type	
Traffic by Make-Model	
Traffic by Sales Rep	
Traffic by Source	
Traffic	

4. The report displays on the right side of the screen.
5. Use the report toolbar to view and print the report as needed.

## Conclusion

That completes learning how to use the Autosoft Finance. Until you are familiar with the program, reference this manual to assist you as you work. If you have any questions that are not answered by this manual, or if you are having a problem with the program, contact support at (800) 473-4630.



## Appendix A My Account

The My Account section allows users to manage their personal information. Users can edit the address, phone numbers, and e-mail address in their employee record. This ensures the information is current. In addition, this section allows users to manage passwords and user-specific log on information for integrations.

### Accessing My Account

1. Click the **My Account** link at the top of the screen.



2. The My Account section displays.

 This screenshot displays the 'My Account' section of the Autosoft Dealer Management System. The left sidebar contains a menu with 'My Account', 'Information', 'Account', and 'Integrations'. The main content area is titled 'Information' and contains several form sections:
 

- Basic Information:** Fields for Prefix (dropdown), First Name (Steve), Middle Name, Last Name (Smith), Suffix, Gender (dropdown), License Number, Date of Birth, Marital Status (dropdown), and SSN.
- Address Information:** Fields for Address (55 Main St), City (West Middlesex), State (PA), ZIP (16159), Apt./Suite, County, County Code, Type (Physical), and a checked 'Primary' checkbox.
- Phone Numbers:** A field containing '724 - 555 - 1234' with an 'Ext.' field, a 'Home' dropdown, and a '+' icon.
- Email Addresses:** An empty field with a '+' icon.

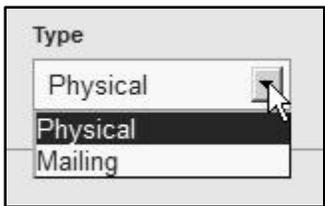
 A 'Save' button is located at the bottom right of the form.

3. There are three pages:
  - **Information:** Use this page to manage your personal information.
  - **Account:** Use this page to manage your password.
  - **Integrations:** Use this page to view your integration log on information.

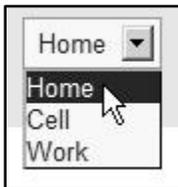
## Managing Information

You use the Information page to review and edit your personal information. This page displays information added to your employee record in the setup. Changes you make here are saved to that record and vice versa. You should review your information regularly and make the necessary edits to ensure your information is current.

1. By default, the Information page displays when you access My Account.
2. Under **Basic Information**, verify your information. Only the **First Name** and **Last Name** are required.
3. The **Address Information** section displays the addresses on file for you. Click the green **+** to add an address. Type the address, and use the **Type** list to select the address type. You can add two addresses for the employee: a physical address and a mailing address. The address is optional, but if you select to add address information for the bank, the **State** field is required. Click the red **X** next to an address to delete it.



4. To add phone numbers, click the green **+**, and enter the phone numbers. The **Type** defaults to Home. Select a different option as needed. You can add three phone numbers for the employee: home, cell, and work. Click the green **+** to add additional phone numbers as needed. Click the red **X** next to a phone number to delete it.



5. To add an e-mail address, click the green **+**, and enter the address. The **Type** defaults to Home. Select a different option as needed. You can add two e-mail addresses for the employee: home and work. Click the green **+** to add an additional e-mail address as needed. Click the red **X** next to an e-mail address to delete it.
6. Click **Save**. You will see a green "Success" message verifying the information has been saved

## Managing Account Information

The Account page displays important information about your log on information for the Autosoft Finance program. You will also use this page when you need to change your password.

1. Click **Account**. The Account page displays.

The screenshot shows the Autosoft Dealer Management System interface. At the top, it says 'ABC Motors' and 'Dashboard | (Steve Smith) Logout'. Below that are navigation tabs: 'Dashboard', 'Customers', 'Deals', 'Inventory', and 'Reporting'. On the left, there is a 'My Account' menu with options: 'Information', 'Account', and 'Integrations'. The main content area is titled 'Account' and contains a 'Login Information' section. It has a 'Login Name' field with the value 'Steve' and a 'Change Password' button. To the right, it shows 'Password Last Changed' as '1/10/2014 10:18:04 AM'. Below that is a 'Forgot Password Email' field with the value 'stevesmith@gmail.com' and a 'Save' button at the bottom right.

2. The **Login Name** is the login that was created for you when the administrator created your account. You cannot edit this.
3. The **Forgot Password Email** displays the e-mail address set to receive messages regarding resetting your password. You can edit this e-mail address as needed.
4. The **Password Last Changed** displays the date and time when the password was last reset.

## Changing Your Password

Your administrator sets the number of days (between 90 and 270) that passwords will remain active. The system will begin prompting you that you need to change your password five days before it expires. You can change your password from this screen. You do not have to wait until your password expires to change it. You can change it whenever you want to change it.

1. Click **Change Password**.
2. The Password Reset screen appears.

The screenshot shows a 'Password Reset' dialog box. It has three input fields: 'Old Password', 'New Password', and 'Confirm New Password'. To the right of these fields is a 'Password strength' section with a list of requirements:

- Case sensitive
- At least 8 characters
- At least 1 number
- At least 1 capital letter
- Cannot be your first or last name
- Cannot be your user id
- Cannot equal any of previous 5 passwords

At the bottom of the dialog box are 'Cancel' and 'Save' buttons.

3. Type your current password in the **Old Password** field.
4. Then, type the new password in both the New Password and Confirm New Password fields. The password must meet the specific criteria listed on the screen.
5. Click **Save**.
6. The **Password Last Changed** information will reflect the current data and time.

## Viewing Integration Information

The **Integration** page displays any integration-specific information that has been added to your account. The administrator must add this information in the integration setup. You cannot edit the information on this page. It is for informational purposes only.

The screenshot displays the Autosoft Dealer Management System interface. At the top left is the Autosoft logo with the tagline "Dealer Management System". To the right of the logo, the text "ABC Motors" is displayed. Further right, there is a navigation bar with "Dashboard | (Steve Smith) Logout". Below this, a dark navigation menu contains the following items: "Dashboard", "Customers", "Deals", "Inventory", and "Reporting". On the left side, there is a "My Account" sidebar menu with options: "Information", "Account", and "Integrations". The "Integrations" option is highlighted with a mouse cursor. The main content area is titled "Integrations" and contains three sections: "Autosoft" with an "Employee Number" input field, "RouteOne" with a text input field, and "RouteOne Single Sign On" with a "Username" input field. A "Save" button is located at the bottom right of the form area.

# Appendix B Editing Frozen Deals

Autosoft has added a feature that allows you to edit deals that have been marked finished. This allows you to edit customer information, gross, or other deal information as needed. This functionality is only available to users who have been given this privilege in the Roles & Permissions setup.

For a finished deal, the selected users will see an **Edit Finished Deal** button on the bottom of the Recap screen.

The screenshot displays the Autosoft software interface for editing a deal. On the left is a navigation menu with categories: Deskling (Front End, Taxes, Fees, Back Adds, Coverage, Life A&H, Inception, Mileage, Roll, Integrations), Deal Forms, Recap (Gross, Commission), and Commission Totals.

The main area shows a financial summary table with columns for item, amount, and subtotal. A 'COST' label is positioned vertically on the left side of this table.

Net Selling Price	26,995.00	Subtotal =	0.00
Doc Fee +	0.00		
Total Book -	0.00	Total =	0.00
Holdback -	0.00	Total Back Gross =	0.00
Dealer Pack -	300.00		
Advertising -	0.00		
Trade Gross -	0.00		
Subtotal =	26,995.00		
Trade(s) ACV +	0.00		
Dealer Cash +	0.00		
Holdback +	0.00		
Dealer Pack +	300.00		
Advertising +	0.00		
Total =	26,995.00		
Total Front Gross =	26,995.00		

Below this is a 'Commission Totals' table:

	Front Commissions	Back Commissions	Reserve Commissions	Spiff	Total
Jason Harmer	\$5,339.00	\$0.00	\$0.00	\$0.00	\$5,339.00
Dale Novotniak	\$6,673.75	\$65.00	\$0.00	\$0.00	\$6,738.75
Charlie Prophet	\$5,339.00	\$0.00	\$0.00	\$0.00	\$5,339.00
<b>Total</b>	<b>\$17,351.75</b>	<b>\$65.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$17,416.75</b>

The 'Vehicle Sold' section includes a 'Date Finished' field set to '12/12/2012 09:37 AM EST'. There are three checkboxes: 'Funded' (unchecked), 'Delivered' (unchecked), and a date input field containing '12/04/2012'. A large grey arrow points to the 'Edit Finished Deal' button. Other buttons include 'Resend to Accounting', 'Unwind Deal', 'Cancel', and 'Save'.

When you click this button, the previously frozen fields are available for editing. You can edit information on any tab for the deal. Again, only selected users have access to edit the fields. The deal remains frozen to all other users.

Description	Amount
Net Selling Price	26,995.00
Doc Fee +	0.00 <input checked="" type="checkbox"/>
<b>Total Book -</b>	0.00
Holdback -	<input type="text" value="0.00"/>
Dealer Pack -	<input type="text" value="300.00"/>
Advertising -	0.00
Trade Gross -	0.00
<b>Subtotal =</b>	26,695.00
Trade(s) ACV +	0.00
Dealer Cash +	<input type="text" value="0.00"/>
Holdback +	0.00 <input checked="" type="checkbox"/>
Dealer Pack +	300.00 <input checked="" type="checkbox"/>
Advertising +	0.00 <input type="checkbox"/>
<b>Total =</b>	26,995.00
Add Adjustment +	<input type="text"/>
<b>Total Front Gross =</b>	26,995.00

Description	Amount
<b>Subtotal =</b>	0.00
<b>Total =</b>	0.00
Add Adjustment +	<input type="text"/>
<b>Total Back Gross =</b>	0.00

The fields remain available for editing until you click the **Finish Editing Deal** button on the Recap screen or click the **X** to close the deal. The fields will return to their frozen state.

	Front Commissions	Back Commissions	Reserve Commissions	Spiff	Total
Jason Harmer	\$5,339.00	\$0.00	\$0.00	\$0.00	\$5,339.00
Dale Novotniak	\$6,673.75	\$65.00	\$0.00	\$0.00	\$6,738.75
Charlie Prophet	\$5,339.00	\$0.00	\$0.00	\$0.00	\$5,339.00
<b>Total</b>	\$17,351.75	\$65.00	\$0.00	\$0.00	\$17,416.75

**Vehicle Sold**

Funded

Delivered

Date Finished 12/12/2012 09:37 AM EST

**Finish Editing Deal** Resend to Accounting Unwind Deal

Cancel Save

**Important:** You can resend the edited deal to Accounting as needed. However, you should always communicate with the Accounting Department when you plan to edit and resend a deal. Once Accounting has posted a deal to the books, you should not resend the deal to Accounting to ensure the deal is not posted twice.

## Appendix C Deleting Deals

There will be scenarios in which an invalid deal is created in the system. For example, a salesperson may create a desk and add a customer but never actually present the sales scenarios to the customer. In this instance, the deal isn't a true deal, so you would not want to mark it as a lost deal because it would cause your lost sale statistics to be incorrect since this is not a true lost deal. In this instance, you will want to delete the deal.

The delete deal feature is only available to users who have Dealer Principal and Finance Administrator access rights. No other users will have access to this feature. When you delete a deal, it is moved to a recycle bin. From this bin, you have the ability to restore the deleted deal or to permanently delete it.

**Important:** The best practice is to mark valid deals that were never delivered as a lost sale using the **Mark as Lost** in the deal. This ensures the deal will be included in the Lost Sales Summary and allows you to search for the deal at a later date.

### Deleting a Deal

Users with Dealer Principal and Finance Administrator access rights will see a Delete Deal link on the Information screen for the deal.

1. Click **Deals**.
2. Select the deal from the Deals list.
3. On the Information tab, click **Delete Deal**.



4. A Delete Deal screen appears.



Delete Deal?

Are you sure you want to delete this deal?

Reason for Deletion

Delete Don't Delete

5. In the Reason for Deletion window, type an explanation for why you are deleting this deal.
6. Click **Delete** to continue.

## Reviewing Deleted Deals

The deleted deals are moves to a recycle bin in the Tool area of the Admin section. Again, only users with Dealer Principal and Finance Administrator access rights have access to this area.

1. Click the **Admin** link.



2. Click the **Tools** tab.



3. The right side of the screen displays a list of deleted deals.
4. Click a deal in the list to view the reason that was added when deleting the deal.

The screenshot shows the Autosoft Dealer Management System interface for ABC Motors. The top navigation bar includes 'Setup', 'Integrations', and 'Tools'. The 'Tools' section is active, displaying a 'Deleted Deals' table. The table has columns for Deal #, Status, Type, Customer, Stock #, Vehicle Information, Purchase, Delete, and User. A single deal is listed with Deal # 26, Status Finance, Type Lease, Customer Araujo, Vinicius, Stock # C0008, Vehicle Information 2011 Chevrolet HHR, Purchase 01/07/2014, Delete 01/10/2014, and User user1. Below the table is a 'Reason for Deletion' section with the text 'Duplicate deal accidentally created.' and 'Restore' and 'Delete' buttons.

Deal #	Status	Type	Customer	Stock #	Vehicle Information	Purchase	Delete	User
26	Finance	Lease	Araujo, Vinicius	C0008	2011 Chevrolet HHR	01/07/2014	01/10/2014	user1

Reason for Deletion  
Duplicate deal accidentally created.

Restore Delete

## Restoring a Deal

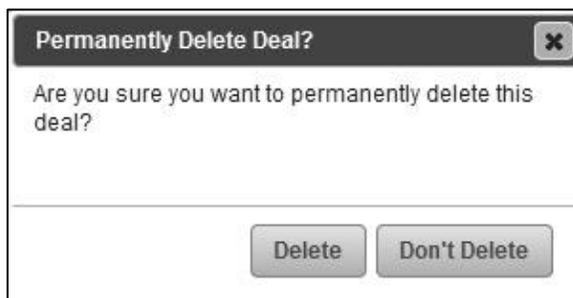
Restoring a deal adds the deal back to the active deals list.

1. Click the **Admin** link.
2. Click the **Tools** tab.
3. The right side of the screen displays a list of deleted deals. Click the deal in the list.
4. Click **Restore**.
5. The deal will be restored and available in the Deals list.

## Permanently Deleting Deals

Permanently deleting a deal removes it from the system. You cannot restore a deal once you delete the deal from this bin.

1. Click the **Admin** link.
2. Click the **Tools** tab.
3. The right side of the screen displays a list of deleted deals. Click the deal in the list.
4. Click **Delete**.
5. Click **Delete** when prompted to verify you want to permanently delete the deal.



## Viewing the Deleted Deals Report

Users who have access rights to delete deals will be able to run a Deleted Deals report in the Sales reports. The report serves as an audit tool for the deleted deals.

## Appendix D Driver's License Scanner

Autosoft Finance provides the option of using a driver's license scanner. This allows you to scan a license to add customer information into the program and to store license images. The program only supports the Scanshell 800R or the Snapshell IDR (available for purchase from Autosoft). No other scanners are supported.

The scanner integrates with three areas of the program. In the Customer area, you can use the scanner on the Search screen to add a new customer to the program or on the **Driver's License** tab in the customer's record to store a copy of the customer's driver's license. In a deal, you can use the scanner on the Search screen in the Applicant area to add a new customer to the program.

### Installing Your Scanner

You will not perform any installation and setup for the scanner without assistance from an Autosoft Support Desk Representative. When you receive your scanner from Autosoft, contact the Support Desk. ***Do not*** install any software that may accompany the scanner. Autosoft will install the necessary software and drivers required for integration with the Autosoft Finance program.

### Using the Scanner to add a new Customer

1. Click **Customers**.
2. Search for the customer as required.
3. Click **Add New w/ Scanner**.
4. The Driver's License Information screen appears.

5. Insert the license into the scanner.

**Tip:** When scanning the back of the license using the Snapshell IDR, make sure the magnetic strip is facing down.

6. Click **Scan Front** or **Scan Back** based on the side you are scanning. When the scan is complete, the image will display in the corresponding window on the screen. If you do not like the way a side scanned, place the license back in the scanner, and click the corresponding **Scan** button to rescan the side.
7. Scan the other side of the license by repeating steps 5-6.
8. When you scan the front of the license, the license information will populate the fields at the bottom of the screen. The boxes next to the completed fields are selected. If you do not want to include a piece of information (including an image), click to clear the box. Review the information, and edit it as needed.

**Driver's License Information**

Front Back

Scan Front Scan Back

Callibrate

Driver's License Number State Expiration

RL303033  OH  12/08/2015

**Basic Information**

First Name Middle Name Last Name Gender Date of Birth

ANGELA   SMITH  Female  12/08/1974

Address Apt./Suite City State ZIP

1537 MAIN ST   YOUNGSTOWN  OH  44505

Cancel Save

9. When you are finished scanning the license and editing the information, click **Save**.
10. The program creates a new customer record.

The screenshot shows a web form with three tabs: "Customer Information", "Credit Information", and "Driver's License". The "Driver's License" tab is active. The form is divided into sections: "Basic Information" with fields for Prefix, First Name (ANGELA), Middle Name, Last Name (SMITH), Suffix, Gender (Female), Nickname, Date of Birth (12/08/1974), Marital Status, and SSN; "Address Information" with fields for Address (1537 MAIN ST), City (YOUNGSTOWN), State (OH), ZIP (44505), Apt./Suite, County, County Code, Type (Physical), and a checked "Primary" checkbox; "Phone Numbers" and "Email Addresses" sections, both currently empty; and a "Save" button at the bottom right.

11. Add any additional information as needed.

## Scanning a Customer's License

Once a customer's information has been added to the program, you can scan and store the license using the **Driver's License** tab in the customer's file.

1. Click **Customers**.
2. Search for the customer.
3. Select the customer.
4. Click **Edit**.
5. Click the **Driver's License** tab.

The screenshot shows the "Driver's License" tab of the form. The "Driver's License Image" section contains four placeholder boxes, each labeled "No Image Available". To the right of these boxes are three buttons: "Delete Images", "Scan License", and "Print". Below the image section is the "Driver's License Information" section, which includes fields for "Driver's License Number", "State" (with a dropdown menu), and "Expiration Date". A "Save" button is located at the bottom right of the form.

6. Click **Scan License**.
7. The Driver's License Information screen appears.
8. Insert the license into the scanner.
9. Click **Scan Front** or **Scan Back** based on the side you are scanning. When the scan is complete, the image will display in the corresponding window on the screen. If you do not like the way a side scanned, place the license back in the scanner, and click the corresponding **Scan** button to rescan the side.
10. Scan the other side of the license by repeating steps 8-9.
11. When you scan the front of the license, the information will populate the fields at the bottom of the screen. The boxes next to the completed fields are selected. The program will update the customer's record with the information displayed. If you do not want to update a piece of information, click to clear the box. Review the information and edit it as needed.
12. When you are finished scanning the license and editing the information, click **Save**.
13. The program updates the customer's information and displays the license images. In addition to the front and the back of the license, the screen displays the customer's photo and signature from the license in separate windows.

Customer Information | Credit Information | Driver's License

Driver's License Image

Delete Images  
Scan License  
Print

Signature

Driver's License Information

Driver's License Number	State	Expiration Date
RL303033	OH	12/08/2015

Save

## Printing the Driver's License

The printout will print the license images stored on the **Driver's License** tab and the information on the **Customer Information** tab.

1. Search for the customer.
2. Select the customer.
3. Click **Edit**.
4. Click the **Driver's License** tab.
5. The top part of the screen displays the scanned images.
6. Click **Print**.

## Deleting the Driver's License Images

1. Search for the customer.
2. Select the customer.
3. Click **Edit**.
4. Click the **Driver's License** tab.
5. The top part of the screen displays the scanned images.
6. Click **Delete Images**.
7. Click **Continue** when prompted to verify you want to delete the images.

## Using the Scanner to add a new Customer to a Deal

1. Create a new desk.
2. Click **Applicant**.
3. Search for the customer as required.
4. Click **Add New w/ Scanner**.
5. The Driver's License Information screen appears.
6. Insert the driver's license into the scanner.
7. Click **Scan Front** or **Scan Back** based on the side you are scanning. When the scan is complete, the image will display in the corresponding window on the screen. If you do not like the way a side scanned, place the license back in the scanner, and click the corresponding **Scan** button to rescan the side.
8. Scan the other side of the license by repeating steps 6-7.
9. When you scan the front of the license, the information will populate the fields at the bottom of the screen. The boxes next to the completed fields are selected. If you do not want to include a piece of information (including an image), click to clear the box. Review the information and edit it as needed.
10. When you are finished scanning the license and editing the information, click **Save**.
11. Select the **Type** and **Source** for the applicant.
12. The program creates a new customer record and adds the customer to the deal.

## Appendix E Menu Selling

Menu Selling allows you to print fully customizable menus with a clean, professional presentation in seconds. It allows your team to consistently offer all available F&I products in a simple, clear format every customer can understand.

### Setting up Menu Selling

You will need to complete setup information for menu selling. This includes determining the information you want to print on the forms and customizing the disclosures. You will also create your menu selling templates. You can create unlimited templates. For each template, you specify which back-end products pull to the template.

1. Click the **Admin** link at the top of the screen.
2. Click **Menu Selling** on the left side of the screen. The Menu Details screen appears.

Menu Defaults					
<b>Product Headers</b>					
Service	Extended Service Con	Maintenance	Maintenance Plan	Life	Life Coverage
Warranty	Extended Warranty Cc	GAP	GAP Plan	A&H	Disability Coverage
<b>Product Amount Options</b>					
<input type="radio"/> No Amounts	<input checked="" type="checkbox"/> Total Product Amount	<input checked="" type="checkbox"/> Payment Variance	12		
<input checked="" type="radio"/> Amount per Day					
<input type="radio"/> Amount per Week					
<input type="radio"/> Amount per Month					
<b>Printing Options</b>					
<input checked="" type="checkbox"/> Selling Price	<input type="checkbox"/> Trade Allowance	<input type="checkbox"/> Trade Payoff	<input checked="" type="checkbox"/> Down Payment	<input type="checkbox"/> Rebate	
<input checked="" type="checkbox"/> Base Payment	<input type="checkbox"/> Original Term	<input type="checkbox"/> Amount Financed	<input type="checkbox"/> APR Money Factor	<input type="checkbox"/> Deal Type	
Save					

3. Under **Product Headers**, type the descriptions you want to print for each item.
4. Under **Product Amount Options**, click to select the amount you want to print per product on the form: No Amounts, Amount per Day, Amount per Week, or Amount per Month.
5. The **Total Product Amount** box allows you to include or exclude the total product amount from printing on the form. Click to select the box to include the total amount, or clear the box to exclude it.
6. The **Payment Variance** box allows you to specify the variance. If you select this box, you can specify the variance you want to use on the form.
7. Use the **Printing Options** section to select the items you want to print on the form.
8. Click **Save** to save the information. You will see a green “Success” message verifying the information has been saved.

## Adding Disclosures

You have the option of using installed disclosures provided by Autosoft or typing your own disclosures. You will need to set a disclosure for each deal type.

1. Click **Disclosures** on the left side of the screen.
2. Type the disclosure you want to print for each deal type.

The screenshot shows a web form titled "Menu Disclosures". It contains four sections, each with a text input field and a "Reset" button:

- Retail Disclosure:** The text box contains the placeholder text "#Retail Disclosure Info.....".
- Lease Disclosure:** The text box contains the placeholder text "Lease Disclosure Info.....".
- Cash Disclosure:** The text box contains the placeholder text "Cash Disclosure Info.....".
- Balloon Disclosure:** The text box contains the placeholder text "Balloon Disclosure Info.....".

A "Save" button is located at the bottom right of the form.

3. If you prefer to use the installed disclosures, click **Rest** to load the disclosure. The information will fill in on the screen. You can make edits to this information as needed. You can click to reset the disclosure to the installed text at any time.

This screenshot shows the "Retail Disclosure" section of the form. The text box is now populated with the following text:

All terms, conditions, payments amounts and rate are estimates only that are subject to a final lender approval. All options set forth above have been fully explained to me. I selected the payment option indicated and fully understand that the purchase of any option is not required, that options may be purchased separately, and that my decision to purchase or not will have no effect on my rate, credit approval, or ability to obtain base financing. According to the Gramm Leach Bliley Act, I have been advised of the Dealer Privacy Notice Law, and further authorize the Dealer to send my Nonpublic Personal Information to the Dealer's vendors.

A mouse cursor is pointing at the "Reset" button in the bottom right corner of the text box.

4. Click **Save** to save the information. You will see a green "Success" message verifying the information has been saved.

## Creating Templates

The **Templates** setup is where you create your menu templates. You completely control the templates by assigning back-end products to each template. You can add six options to a package. When working the deal, you choose which template the menu uses. You can then edit the menu to remove options as you work the deal.

### Adding a new Template

1. Click **Templates** on the left side of the screen.
2. Click **Add New**.
3. Type a name for the template.
4. Use the **Deal Type** and **Inventory Type** lists to select the deal type and inventory type for which this template applies.

5. Under **Package Names**, type the names you want to assign the four options. As you type names in these fields, the names for the options in the **Menu Products** section change.

6. Add up to six products using the Menu Products section. Click the green **+** to add a new product. In the Select Product window that appears, select the Product Type, Provider Name, and Plan Name. Click **Save**. The product is added to the template.

7. Click the red **X** next to a product to remove it.
8. Next, use the boxes to select the products you want available for each level of the template. Selecting a box will include the item. A blank box excludes the item.

Menu Products						
Product Type	Provider	Plan	<input checked="" type="checkbox"/> Platinum	<input checked="" type="checkbox"/> Gold	<input checked="" type="checkbox"/> Silver	<input checked="" type="checkbox"/> Bronze
 Warranty	First Care Co.	Vehicle Value Guard I	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> 
 Warranty	First Care Co.	Vehicle Value Guard II	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> 
						

9. You can arrange the products by clicking and holding the handles (dots) at the beginning of the row. The cursor changes to the move symbol so you can drag and drop the item where you want it in the list.

Menu Products	
Product Type	Provider
 Warranty	First Care Co.
 Warranty	First Care Co.

10. When you are finished adding products, click **Save** to save the information. You will see a green "Success" message verifying the information has been saved.

## Removing Templates

1. Click **Templates** on the left side of the screen.
2. Click the **X** in the **Delete** column for the template you want to delete.

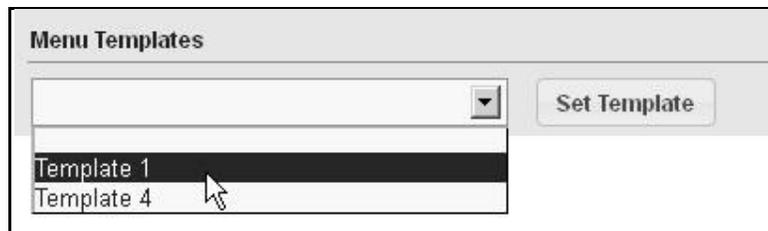
## Using Menu Selling

You access menu selling from the Deal menu. These items should be added in the F&I office using menu selling. The system will take the calculated payment (based on the vehicle price, rebates, cash down, and financing terms) and use it to calculate the new payments with the back-end products. Each package can be edited “on the fly” to accommodate the customer’s needs.

Once the packages are set, you print the package details. The system will print a clear form outlining all the options available for the different packages and the payment information for each package. Once the customer selects the desired package and package options, the system prints an acceptance form that clearly lists the accepted and declined products. The form also includes a disclaimer and customer signature line.

## Working Menu Selling

1. The manager works the deal.
2. Once the deal is flagged “Ready for Finance,” the **Menu** option of the left side of the screen is available.
3. Click **Menu**.
4. Use the **Menu Template** list to select the template you want to use for the deal. The templates that display in the list are based on the deal type and vehicle type set for the template in the setup.



5. Click **Set Template**. The template fills in on the screen.

**Tip:** You can select a template and click **Set Template** to reset the screen back to the original template options once you start editing package options.

- The **Menu Products** section displays the products added to the template. You can edit the packages and products as needed before presenting the menu to the customer.

Name	<input checked="" type="checkbox"/> Platinum	<input checked="" type="checkbox"/> Gold	<input checked="" type="checkbox"/> Silver	<input checked="" type="checkbox"/> Bronze
<b>Service</b> GMPP Basic Guard	<input checked="" type="checkbox"/> 1,495.00			
<b>GAP</b> Zuric Basic GAP	<input checked="" type="checkbox"/> 695.00	<input checked="" type="checkbox"/> 695.00	<input checked="" type="checkbox"/> 695.00	<input type="checkbox"/>
<b>Back Add</b> Paint Protection ResistAll Premium Pkg	<input checked="" type="checkbox"/> 895.00	<input checked="" type="checkbox"/> 895.00	<input type="checkbox"/>	<input type="checkbox"/>
<b>Maintenance</b> First Extended Service Corporation Simple Care	<input checked="" type="checkbox"/> 175.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

To remove a product from a package, click the option price. Clear the check mark from the **Active** box, and click **Save**.

Bronze  
  
 1,495.00

**Service** ✕

**Active**

**Retail**       **Cost**

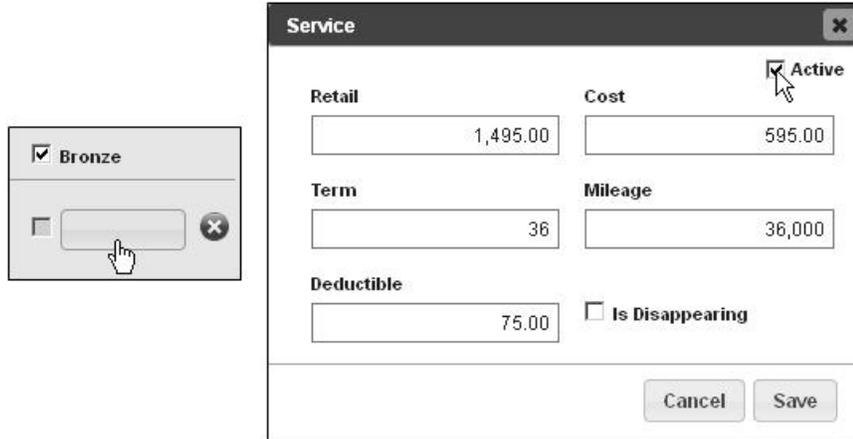
**Term**       **Mileage**

**Deductible**        **Is Disappearing**

To remove an entire package, click to clear the check mark from the box in front of the package name. To add a package back to the menu, click to add the check mark back to the box in front of the package name.

Name	<input checked="" type="checkbox"/> Platinum	<input checked="" type="checkbox"/> Gold	<input checked="" type="checkbox"/> Silver	<input type="checkbox"/> Bronze
Selected Package: [Dropdown]      Settings...      Print Menu				

You will need to click each individual blank option you want to include in the added package. You will also do this to add an option to a package that does not exist in the selected template. On the pricing screen that appears, verify the pricing. (The fields that display on the screen will vary based on the product you are adding.) Click to select the **Active** box, and click **Save**. This will add the option to the package.



To edit the pricing for a product, click the price. The pricing screen appears. (The fields that display on the screen will vary based on the product you are adding.) Edit the prices as needed, and click **Save**.

To remove a product from the menu, click the red **x** at the end of the line. To add a product, click the green **+**. Use the drop-down lists to select the product you want to add.

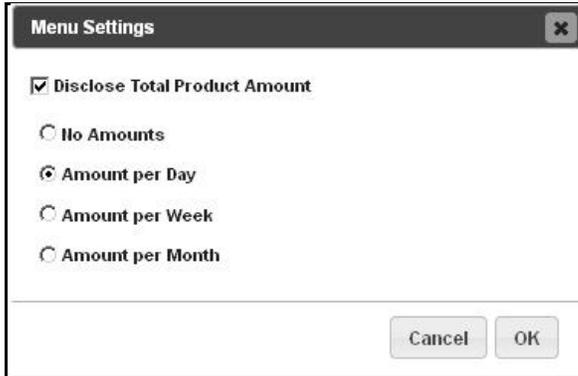
- The **Payments** section identifies the payments for each package. The **Term** is based on the **Payment Variance** set under **Product Amount Options** in the Menu Selling setup. You can manually edit these values as needed.

Payments (Monthly)							
Term	APR	Base	Platinum	Gold	Silver	Bronze	Print
<input type="radio"/> 54	<input type="text" value="6.990 %"/>	<input type="text" value="533.89"/>	<input type="text" value="608.43"/>	<input type="text" value="604.64"/>	<input type="text" value="584.11"/>	<input type="text" value="568.17"/>	<input checked="" type="checkbox"/>
<input checked="" type="radio"/> 66	<input type="text" value="6.990 %"/>	<input type="text" value="451.39"/>	<input type="text" value="514.42"/>	<input type="text" value="511.22"/>	<input type="text" value="493.86"/>	<input type="text" value="480.38"/>	<input checked="" type="checkbox"/>
<input type="radio"/> 78	<input type="text" value="6.990 %"/>	<input type="text" value="394.54"/>	<input type="text" value="449.62"/>	<input type="text" value="446.82"/>	<input type="text" value="431.65"/>	<input type="text" value="419.87"/>	<input checked="" type="checkbox"/>

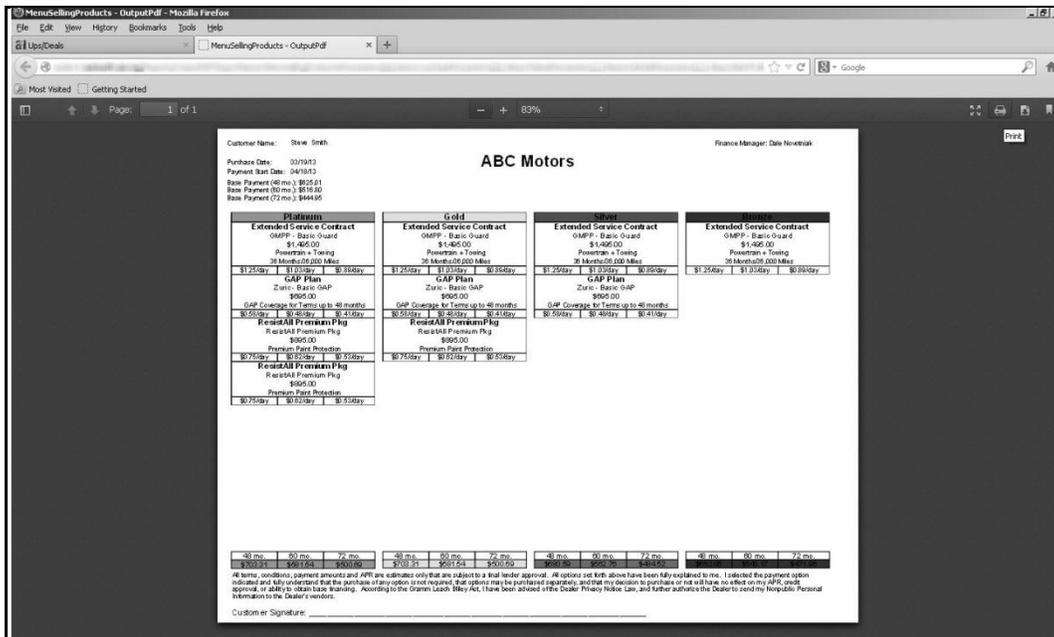
**Tip:** The Payments section for lease deals will include a Residual column for each line.

- Click **Save** to save changes. You will see a green “Success” message verifying the information has been saved.

- Click **Settings** to verify the settings selected are how you want the menu to print. Click **OK** to save the changes you make to the settings.



- You can click the **Print Menu** link to print a copy of the packages. The menu opens in a new tab in the browser window. All selected options for each package print when you print the menu. The printout includes only the items specified to print on the printout in the Menu Selling setup. The bottom of the printout includes a disclaimer and signature line for the customer to sign. Click the **Print** icon to print the menu.



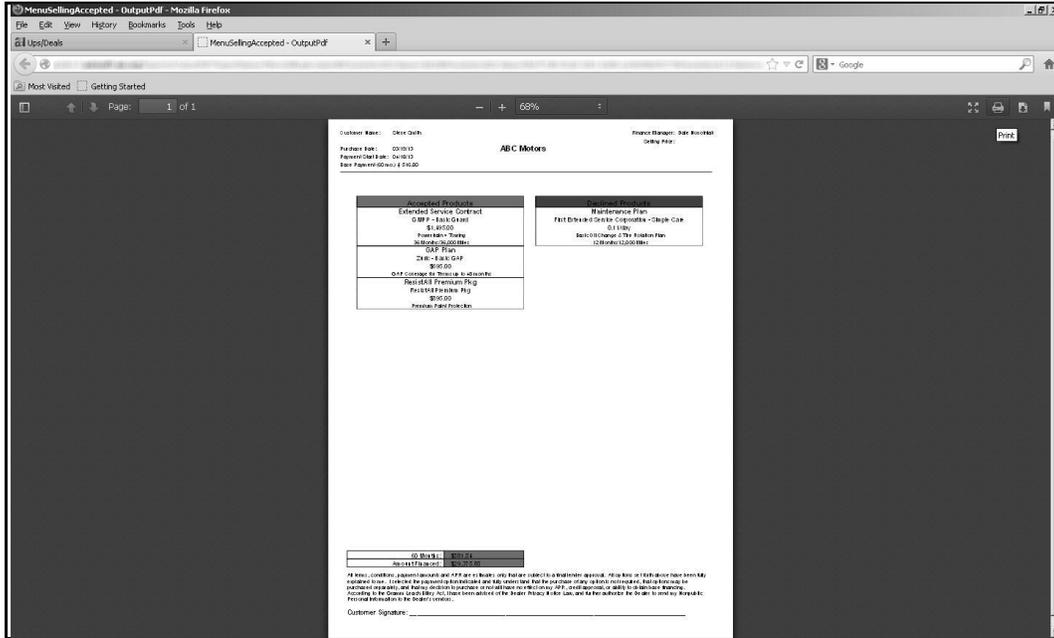
10. Once the customer reviews the menu, you can remove any declined options from a package by clicking to clear the check mark in the box in front of the option price. This flags the option as declined and ensures it prints on the menu acceptance form as a declined option.

Name	<input checked="" type="checkbox"/> Platinum
<b>Service</b>	
GMPP	<input checked="" type="checkbox"/> 1,495.00
Basic Guard	
<b>GAP</b>	
Zuric	<input type="checkbox"/> 695.00
Basic GAP	
<b>Back Add</b>	
Paint Protection	<input checked="" type="checkbox"/> 895.00
ResistAll Premium Pkg	
<b>Maintenance</b>	
First Extended Service Corporation	<input checked="" type="checkbox"/> 175.00
Simple Care	

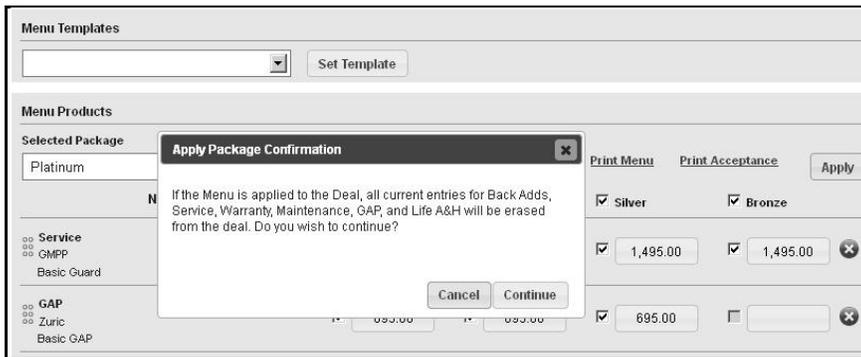
11. Once the customer decides on a package, select the package from the **Selected Package** list.

Menu Products	
<b>Selected Package</b>	<input type="button" value="Settings..."/>
<input type="text" value=""/>	<input checked="" type="checkbox"/> Platinum
Platinum	<input checked="" type="checkbox"/> 1,495.00
Gold	
Silver	
Bronze	
Basic Guard	

- Click the **Print Acceptance** link. The acceptance form displays in a new tab in the browser window. The acceptance form prints only information for the purchased package. It lists all the purchased and declined products and the payment and total cost for each product. The bottom of the form includes a disclaimer and signature line for the customer to sign. This ensures you have a record of everything the customer accepted and declined along with the customer's signature verifying the information. Click the **Print** icon to print the form.



- Click **Apply** on the Menu Selling screen to apply the menu option to the deal.
- The system warns you that applying the menu will remove all Back Adds, Service, Warranty, Maintenance, GAP, and Life A&H from the deal. Click **Continue** to finish applying the menu options.



## Printing the Acceptance Form for a Frozen Deal

Once the deal has been closed, you can still print the menu selling acceptance form from the frozen deal. Click the **Print Acceptance** link on the frozen Desking screen.

Smith
Print Acceptance Retail - Sold - 010001

**Information**

Applicant

Insurance

Vehicle

Trade

Activities

Up Forms

**Desking**

Front End

Taxes

Fees

Back Adds

Coverage

Life A&H

Inception

Mileage

Roll

**Integrations**

Menu

**Deal Forms**

Recap

Gross

Commission

Financed		Inception
Description	Amount	
Base Selling Price	+ 23,995.99	
Mud Flaps	+ 150.00	
<b>Total Financed Tax</b>	<b>+ 1,633.86</b>	
Documentary Fee	+ 100.00	
Lien Fee	+ 90.00	
Tire Fee	+ 80.00	
Messenger Fee	+ 70.00	
Online Fee	+ 60.00	
License	+ 70.00	
Registration	+ 60.00	
Certificate of Title	+ 50.00	
Transfer	+ 40.00	
Increase	+ 30.00	
Notary	+ 20.00	
ResistAll Premium Pkg	+ 895.00	
Basic Guard	+ 1,495.00	
Simple Care	+ 175.00	
Basic GAP	+ 695.00	
<b>Sub Total</b>	<b>= 29,709.85</b>	
<b>Total</b>	<b>= 29,709.85</b>	

**Terms and Conditions**

Payment Type Monthly

Payment Date 04/14/2013

Purchase Date 03/15/2013

Term 66

Days to First Pay 30

Rate 6.990%

Effective Rate 6.990%

**Truth In Lending**

Description	Amount
65 Payments	= 543.50
Final Payment	= 543.50
Finance Charge	= 6,161.15
<b>Total of Payments</b>	<b>= 35,871.00</b>
<b>Total Down</b>	<b>= 0.00</b>
<b>Total Sales Price</b>	<b>= 35,871.00</b>

**Memo**

No text entered.



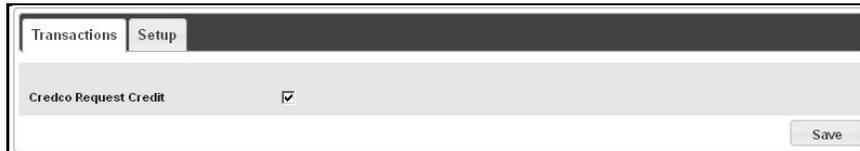
## Appendix F Credco

The Credco integration allows you to pull credit reports. The integration allows dealers to access credit reports from the three credit bureaus: Equifax, Experion, and TransUnion.

### Credco Integration Setup

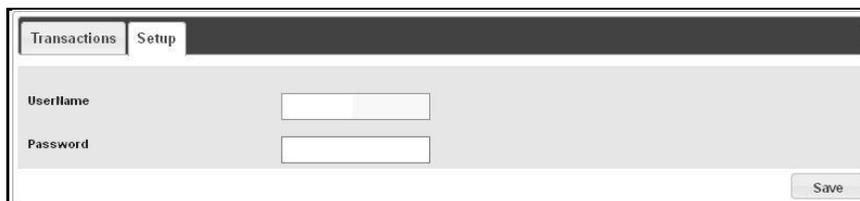
You need to verify your Finance program is set up to transfer deal information to Credco. This includes verifying your Credco username and password are set in the integration setup.

1. Click **Setup**.
2. Click **Integrations**.
3. Click **Credco** in the Integrations list.
4. Click to select **Credco Request Credit** on the **Transactions** tab, and click **Save**.



The screenshot shows a web interface with two tabs: 'Transactions' and 'Setup'. The 'Transactions' tab is active. Below the tabs, there is a section for 'Credco Request Credit' with a checked checkbox. A 'Save' button is located at the bottom right of the section.

5. Click the **Setup** tab.



The screenshot shows the same web interface, but now the 'Setup' tab is active. Below the tabs, there are two input fields: 'Username' and 'Password'. A 'Save' button is located at the bottom right of the section.

6. Type your dealership's Credco username and password, and click **Save**.
7. The setup is now complete.

## Requesting Credit Reports

1. Click **Integrations**.
2. Select **Credco** from the **Organization Integration** list.
3. Select **CredCo Request Credit** from the **Transactions** list.
4. Click to select the applicant, the co-applicant (if applicable), or Joint to request a joint report for married couples (if applicable).
5. Click to select just the credit bureaus you want to pull.

**Credit Order**

DAVID DELINQUENT   
  DEBBIE DELINQUENT   
  Joint (Must be Married)

Equifax   
  Experian   
  TransUnion

**Send**

6. Click **Send**.
7. A new window opens and displays the pulled reports. View and print them as needed.
8. The returned credit report(s) will also display at the bottom of the Integrations screen. Click a report to view the full report.

**Credit Order**

DAVID DELINQUENT   
  DEBBIE DELINQUENT   
  Joint (Must be Married)

Equifax   
  Experian   
  TransUnion

**Send**

---

**Credit Reports**

Reference Number	Name	Type	EQ	EX	TU	Date	User
300127059940000	DAVID DELINQUENT, DEBBIE DELINQUENT	Joint	X	X		03/15/2013 02:40PM	Andrea Harvey

Page 1 of 1    View 1 - 5 of 1

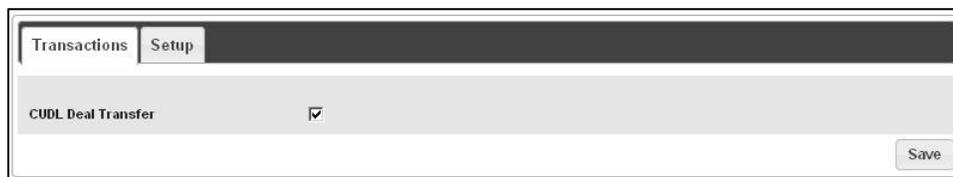
## Appendix G CUDL

The CUDL integration allows you to transfer deal information for CUDL credit union members to the CUDL Website. You will then log on to the CUDL Website and add any additional information and submit the credit application.

### CUDL Integration Setup

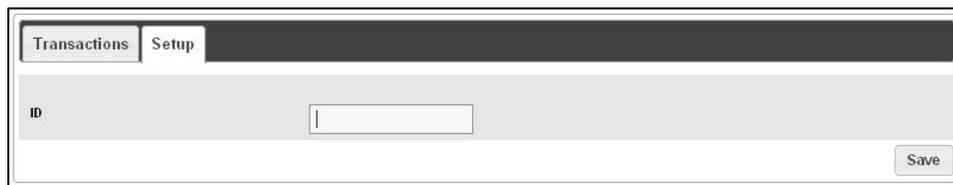
You need to verify your Finance program is set up to transfer deal information to CUDL. This includes verifying your CUDL ID number is added to the CUDL integration setup. This is the ID number CUDL assigned your dealership.

1. Click **Setup**.
2. Click **Integrations**.
3. Click **CUDL** in the Integrations list.
4. Click to select **CUDL Deal Transfer** on the **Transactions** tab, and click **Save**.



The screenshot shows a web interface with two tabs: 'Transactions' and 'Setup'. The 'Transactions' tab is active. Below the tabs, there is a section labeled 'CUDL Deal Transfer' with a checked checkbox. A 'Save' button is located in the bottom right corner of the section.

5. Click the **Setup** tab.
6. Type your dealership's CUDL ID, and click **Save**.



The screenshot shows the same web interface as the previous one, but now the 'Setup' tab is active. Below the tabs, there is an 'ID' label followed by an empty text input field. A 'Save' button is located in the bottom right corner of the section.

7. The setup is now complete.

## Submitting a Deal Information

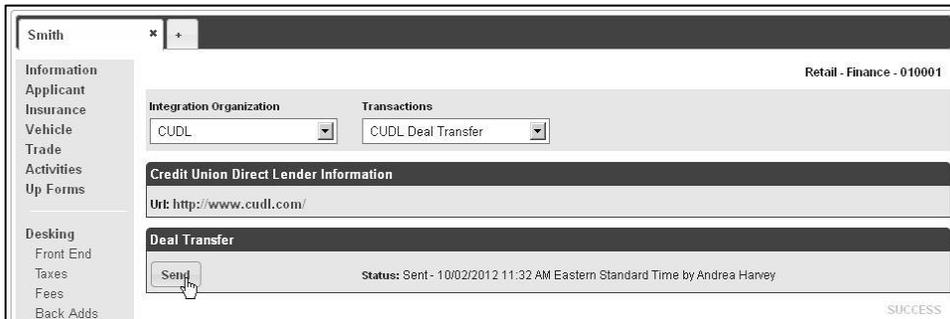
You will use the **Integrations** link on the deal menu to transfer the deal information. This process simply transfers the deal information to CUDL. You must log on to the CUDL Website to complete the application and to submit it.

1. Create the deal.
3. Click **Integrations**.
4. Select **CUDL** in the **Integrations Organization** list.
5. Select **CUDL Deal Transfer** in the **Transactions** list.



The screenshot shows a web application interface for a deal named 'Smith'. On the left is a navigation menu with options: Information, Applicant, Insurance, Vehicle, Trade, Activities, Up Forms, Desking, Front End, Taxes, Fees, and Back Adds. The main area has a header 'Retail - Finance - 010001'. Below it are two dropdown menus: 'Integration Organization' (set to 'CUDL') and 'Transactions' (with 'CUDL Deal Transfer' selected). A mouse cursor is pointing at the 'CUDL Deal Transfer' option.

6. Click **Send**.
7. You will see a Success message when the information has been sent, and the status will be "Sent" followed by the time stamp for the transfer.



The screenshot shows the same interface as the previous one, but now the 'Send' button is highlighted with a mouse cursor. Below the dropdown menus, there are two sections: 'Credit Union Direct Lender Information' with the URL 'http://www.cudl.com/' and 'Deal Transfer' with the status message: 'Status: Sent - 10/02/2012 11:32 AM Eastern Standard Time by Andrea Harvey'. The word 'SUCCESS' is visible in the bottom right corner.

If there are errors in the information, the status will “Rejected” followed by the time stamp for the transfer, and the program will display an error message identifying the information that needs to be corrected. Correct the information and send the deal again.

Smith x +

Retail - Finance - 010001

SSN is required for the Applicant.

Integration Organization: CUDL Transactions: CUDL Deal Transfer

Credit Union Direct Lender Information  
Url: <http://www.cudl.com/>

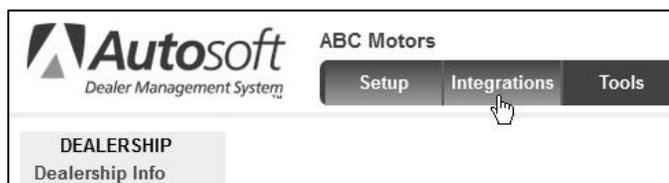
Deal Transfer  
Send Status: Rejected - 10/02/2012 11:34 AM Eastern Standard Time by Andrea Harvey  
ERROR - See top of page for details.

8. You can click the url on the screen to go to the log on page of the CUDL Website. You will need to review the deal information and add any additional information required. The credit application is not complete until you finish submitting it through CUDL's Website.

## Reviewing the CUDL Transaction Log

Users with administrative rights (those who can access the setup) can review the CUDL transaction log. This allows you to review which deals were successfully transmitted and which deals did not go through. You can submit deals from the log as needed.

1. Click the **Admin** link at the top of the screen.
2. Click the **Integrations** tab.



3. Click **CUDL** on the left side of the screen.
4. The right side of the screen displays all the open deals.

- The **Sent Date** column identifies the date the deal was sent. The column displays “Not Sent” for deals that haven’t been submitted or “Rejected” for deals that CUDL did not accept.

CUDL Integration							
Transactions		CUDL Deal Transfer	Start Purchase Date	03/01/2013	End Purchase Date	03/13/2013	
							<input type="checkbox"/> Show Only Unsent <input type="button" value="Filter"/>
Deal #	Stock #	Customer	Address	Vehicle Information	VIII	Sent Date	User
1	C0001	Araujo, Vinicius	3858 West Ave, Orlando, FL 32824	2011 Chevrolet Corvette	1G1YS2DW8B5111867	03/12/2013	Harvey
2	C0002	Trinca, Zach	1548 Main Rd, Charlotte, NC 28274	2011 Chevrolet Tahoe	1G1YS2DW8B5111868	03/13/2013	John
3	20191	Trinca, Justin	456 Independence Rd, Charlotte, NC 28274	2011 Chevrolet Silverado K1500	3GCRKSE37A0219597	Not Sent	
4		Pleines, David	7589 East Trade Street, Sharon, PA 16148			Not Sent	
5	C0001	Wisman, Kaysi		2011 Chevrolet Corvette	1G1YS2DW8B5111867	Rejected	John

View 1 - 5 of 80

- You can filter the list using the **Start Purchase Date** and **End Purchase Date** options.
- To view only the deals that have not been sent to CUDL, click to select the **Show Only Unsent** box and click **Filter**.
- Click a deal in the list to view a summary of the deal information.
- You can click **Send** to submit the deal right from this screen.

**INTEGRATIONS**

CUDL

CVR

DealerTrack

RouteOne

TriVIN

CUDL Integration							
Transactions		CUDL Deal Transfer	Start Purchase Date	03/01/2013	End Purchase Date	03/13/2013	
							<input type="checkbox"/> Show Only Unsent <input type="button" value="Filter"/>
Deal #	Stock #	Customer	Address	Vehicle Information	VIII	Sent Date	User
1	C0001	Araujo, Vinicius	3858 West Ave, Orlando, FL 32824	2011 Chevrolet Corvette	1G1YS2DW8B5111867	03/12/2013	Harvey
2	C0002	Trinca, Zach	1548 Main Rd, Charlotte, NC 28274	2011 Chevrolet Tahoe	1G1YS2DW8B5111868	03/13/2013	John
3	20191	Trinca, Justin	456 Independence Rd, Charlotte, NC 28274	2011 Chevrolet Silverado K1500	3GCRKSE37A0219597	Not Sent	John
4		Pleines, David	7589 East Trade Street, Sharon, PA 16148			03/13/2013	John
5	C0001	Wisman, Kaysi		2011 Chevrolet Corvette	1G1YS2DW8B5111867	Rejected	John

View 1 - 5 of 80

**Credit Union Direct Lender Information**

Url: <http://www.cudl.com/>

**Deal Information**

<b>Applicant</b> David Pleines	<b>Vehicle</b>
<b>Address</b> 7589 East Trade Street	<b>VIII</b>
<b>City</b> Sharon	<b>Stock Number</b>
<b>State</b> Pennsylvania	
<b>ZIP</b> 16148	

**Deal Transfer**

Status: Sent - 03/13/2013 10:31 AM Eastern Standard Time by Sean John

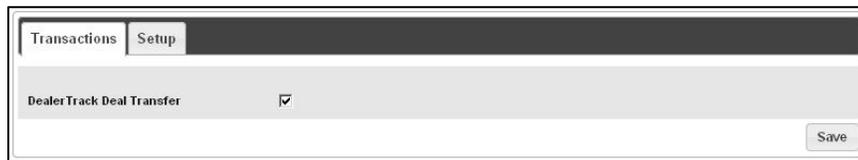
## Appendix H DealerTrack

The DealerTrack integration allows you to transfer deal information to the DealerTrack Website. You will then log on to the DealerTrack Website and add any additional information and submit the credit application.

### DealerTrack Integration Setup

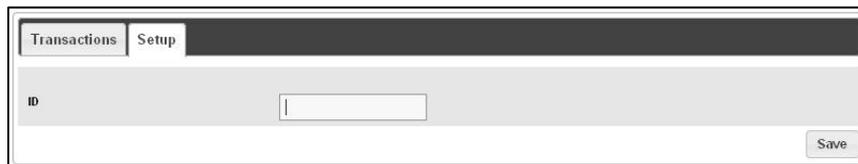
You need to verify your Finance program is set up to transfer deal information to DealerTrack. This includes verifying your DealerTrack ID number is added to the DealerTrack integration setup. This is the ID number DealerTrack assigned your dealership.

1. Click **Admin**.
2. Click **Integrations**.
3. Click **DealerTrack** in the Integrations list.
4. Click to select **DealerTrack Deal Transfer** on the **Transactions** tab, and click **Save**.



The screenshot shows a web interface with two tabs: 'Transactions' and 'Setup'. The 'Transactions' tab is active. Below the tabs, there is a section labeled 'DealerTrack Deal Transfer' with a checked checkbox. A 'Save' button is located in the bottom right corner of the form area.

5. Click the **Setup** tab.
6. Type your dealership's DealerTrack ID, and click **Save**.



The screenshot shows the same web interface as the previous one, but now the 'Setup' tab is active. Below the tabs, there is a section labeled 'ID' with an empty input field. A 'Save' button is located in the bottom right corner of the form area.

7. The setup is now complete.

### Submitting a Deal Information

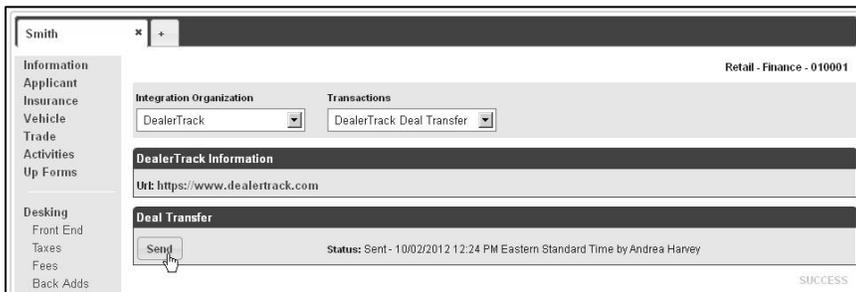
You will use the **Integrations** link on the deal menu to transfer the deal information. This process simply transfers the deal information to DealerTrack. You must log on to the DealerTrack Website to complete the application and to submit it.

1. Create the deal.
2. Click **Integrations**.

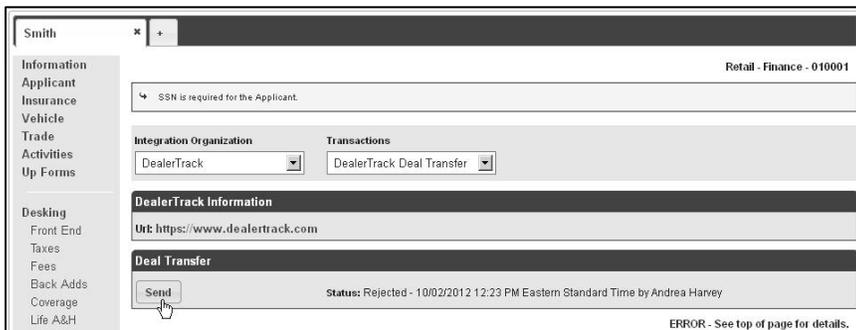
3. Select **DealerTrack** in the **Integrations Organization** list.
4. Select **DealerTrack Deal Transfer** in the **Transactions** list.



5. Click **Send**.
6. You will see a Success message when the information has been sent, and the status will be "Sent" followed by the time stamp for the transfer.



If there are errors in the information, the status will "Rejected" followed by the time stamp for the transfer, and the program will display an error message identifying the information that needs to be corrected. Correct the information and send the deal again.



7. You can click the url on the screen to go to the log on page of the DealerTrack Website. You will need to review the deal information and add any additional information required. The credit application is not complete until you finish submitting it through DealerTrack Website.

## Reviewing the DealerTrack Transaction Log

Users with administrative rights (those who can access the setup) can review the DealerTrack transaction log. This allows you to review which deals were successfully transmitted and which deals did not go through. You can submit deals from the log as needed.

1. Click the **Admin** link at the top of the screen.
2. Click the **Integrations** tab.



3. Click **DealerTrack** on the left side of the screen.
4. The right side of the screen displays all the open deals.
5. The **Sent Date** column identifies the date the deal was sent. The column displays “Not Sent” for deals that haven’t been submitted or “Rejected” for deals that DealerTrack did not accept.

DealerTrack Integration							
Transactions		DealerTrack Deal Transfer		Start Purchase Date	03/01/2013	End Purchase Date	03/14/2013
							<input type="checkbox"/> Show Only Unsent <input type="button" value="Filter"/>
Deal #	Stock #	Customer	Address	Vehicle Information	VIN	Sent Date	User
1	C0001	Araujo, Vinicius	3858 West Ave, Orlando, FL 32824	2011 Chevrolet Corvette	1G1YS2DW8B5111867	03/14/2013	Harvey
2	C0002	Trinca, Zach	1548 Main Rd, Charlotte, NC 28274	2011 Chevrolet Tahoe	1G1YS2DW8B5111868	03/14/2013	Harvey
3	20191	Trinca, Justin	456 Independence Rd, Charlotte, NC 28274	2011 Chevrolet Silverado K1500	3GCRKSE37AG219597	03/14/2013	John
4		Pleines, David	7589 East Trade Street, Sharon, PA 16148			Not Sent	
5	C0001	Wisman, Kaysi		2011 Chevrolet Corvette	1G1YS2DW8B5111867	Not Sent	

6. You can filter the list using the **Start Purchase Date** and **End Purchase Date** options.
7. To view only the deals that have not been sent to DealerTrack, click to select the **Show Only Unsent** box and click **Filter**.

8. Click a deal in the list to view a summary of the deal information.
9. You can click **Send** to submit the deal right from this screen.

**INTEGRATIONS**

CUDL

CVR

DealerTrack

RouteOne

TriVIN

**DealerTrack Integration**

Transactions: DealerTrack Deal Transfer    Start Purchase Date: 03/01/2013    End Purchase Date: 03/14/2013

Show Only Unsent   

Deal #	Stock #	Customer	Address	Vehicle Information	VIN	Sent Date	User
<a href="#">1</a>	C0001	Araujo, Vinicius	3858 West Ave, Orlando, FL 32824	2011 Chevrolet Corvette	1G1YS2DW6B5111867	03/14/2013	Harvey
<a href="#">2</a>	C0002	Trinca, Zach	1548 Main Rd, Charlotte, NC 28274	2011 Chevrolet Tahoe	1G1YS2DW6B5111868	03/14/2013	Harvey
<a href="#">3</a>	20191	Trinca, Justin	456 Independence Rd, Charlotte, NC 28274	2011 Chevrolet Silverado K1500	3GCRKSE37AG219597	03/14/2013	John
<a href="#">4</a>		Pleines, David	7589 East Trade Street, Sharon, PA 16148			Not Sent	
<a href="#">5</a>	C0001	Wisman, Kayzi		2011 Chevrolet Corvette	1G1YS2DW6B5111867	03/14/2013	John

Page 1 of 16    View 1 - 5 of 80

**DealerTrack Information**

Url: <https://www.dealtrack.com>

**Deal Information**

<b>Applicant</b> Kayzi Wisman	<b>Vehicle</b> 2011 Chevrolet Corvette
<b>Address</b>	<b>VIN</b> 1G1YS2DW6B5111867
<b>City</b>	<b>Stock Number</b> C0001
<b>State</b>	
<b>ZIP</b>	

**Deal Transfer**

     Status: Sent - 03/14/2013 09:42 AM Eastern Standard Time by Sean John

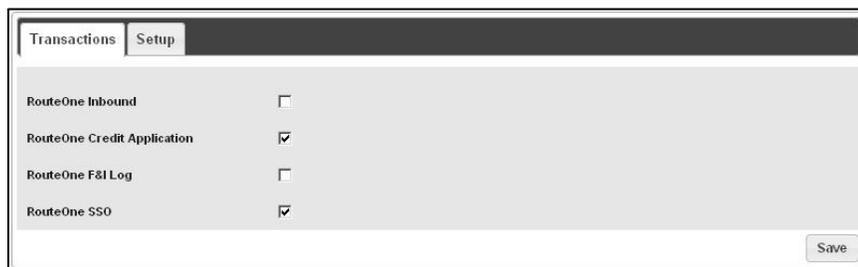
## Appendix I RouteOne

The RouteOne integration allows you to transfer deal information to the RouteOne Website. You will then log on to the RouteOne Website and add any additional information and submit the credit application.

### DealerTrack Integration Setup

You need to verify your Finance program is set up to transfer deal information to RouteOne. This includes verifying your RouteOne ID number is added to the RouteOne integration setup. This is the ID number RouteOne assigned your dealership. This is also where you will choose to use the single sign on feature available for RouteOne.

1. Click **Setup**.
2. Click **Integrations**.
3. Click **RouteOne** in the Integrations list.
4. Click to select **RouteOne Credit Application** and **RouteOne SSO** on the **Transactions** tab, and click **Save**.



Integration Option	Checked
RouteOne Inbound	<input type="checkbox"/>
RouteOne Credit Application	<input checked="" type="checkbox"/>
RouteOne F&I Log	<input type="checkbox"/>
RouteOne SSO	<input checked="" type="checkbox"/>

**Note:** The RouteOne Inbound and RouteOne F&I Log integrations are in development. Autosoft will provide additional information when these integrations are available for use.

5. Click the **Setup** tab.
6. Type your dealership's RouteOne ID, and click **Save**.

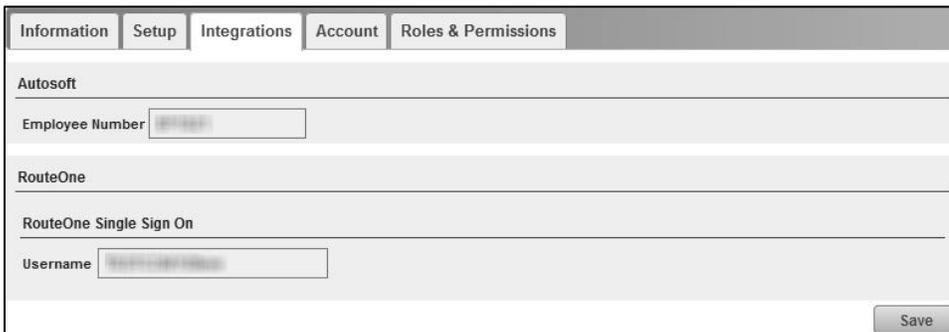


The screenshot shows a web interface with two tabs: 'Transactions' and 'Setup'. The 'Setup' tab is active. Below the tabs, there is a section labeled 'ID' with a text input field. At the bottom right of this section, there is a 'Save' button.

## Employee Setup

You can add usernames for each employee who is permitted to access RouteOne. Adding the username in the employee's setup allows the employee to use the RouteOne single sign on feature. Instead of typing the username and password, the program will automatically pull the username from the employee's file and use it to sign on to RouteOne.

1. Click **Employees** on the Setup menu.
2. Click the employee in the list.
3. Click the Integrations tab.
4. Type the employee's RouteOne username, and click **Save**.



The screenshot shows a web interface with five tabs: 'Information', 'Setup', 'Integrations', 'Account', and 'Roles & Permissions'. The 'Integrations' tab is active. The form is organized into sections: 'Autosoft' with an 'Employee Number' field, 'RouteOne' with a 'RouteOne Single Sign On' section, and 'Username' with a text input field. A 'Save' button is located at the bottom right.

5. Repeat steps 2-4 for each employee who needs to use RouteOne.

## Submitting a Deal Information

You will use the **Integrations** link on the deal menu to transfer the deal information. This process simply transfers the deal information to RouteOne. You must log on to the RouteOne Website to complete the application and to submit it.

1. Create the deal.
2. Click **Integrations**.
3. Select **RouteOne** in the **Integrations Organization** list.
4. Select **RouteOne Deal Transfer** in the **Transactions** list.

The screenshot shows a web interface for a deal named 'Smith'. On the left is a navigation menu with options: Information, Applicant, Insurance, Vehicle, Trade, Activities, Up Forms, Desking, Front End, Taxes, Fees, Back Adds. The main area has two dropdown menus: 'Integration Organization' set to 'RouteOne' and 'Transactions' set to 'RouteOne Credit Application'. The top right corner shows 'Retail - Working - 010001'.

5. Click **Send**.
6. You will see a Success message when the information has been sent, and the status will be "Sent" followed by the time stamp for the transfer.

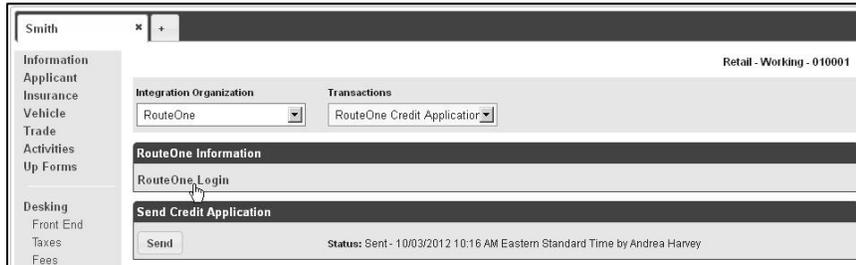
The screenshot shows the same deal menu after the 'Send' button has been clicked. The 'Send Credit Application' section now displays a success message: 'Status: Sent - 10/03/2012 10:16 AM Eastern Standard Time by Andrea Harvey'. The 'Send' button is highlighted with a mouse cursor. The word 'SUCCESS' is visible in the bottom right corner.

If there are errors in the information, the status will "Rejected" followed by the time stamp for the transfer, and the program will display an error message identifying the information that needs to be corrected. Correct the information and send the deal again.

The screenshot shows the deal menu with an error message at the top: 'The Applicant's SSN must be supplied.' Below the dropdowns, the 'Send Credit Application' section displays a rejection message: 'Status: Rejected - 10/03/2012 10:14 AM Eastern Standard Time by Andrea Harvey'. The 'Send' button is highlighted with a mouse cursor. The text 'ERROR - See top of page for details.' is visible in the bottom right corner.

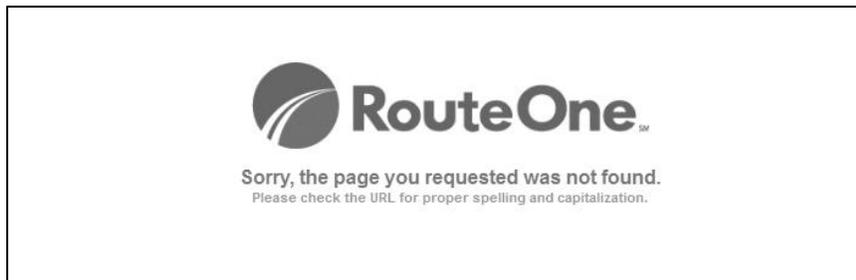
## Using the Single Sign on

You can click RouteOne Login to log on to the RouteOne Website. The program pulls the user name entered for the current employee to log on to the site. If the user name is incorrect, you will be directed to a new log on page. Once you are logged on to the RouteOne site, you will review the deal information and add any additional information required. The credit application is not complete until you finish submitting it through RouteOne Website



The screenshot shows a web browser window with a tab labeled 'Smith'. The page title is 'Retail - Working - 010001'. On the left is a vertical navigation menu with categories: Information, Applicant, Insurance, Vehicle, Trade, Activities, Up Forms, Desking, Front End, Taxes, and Fees. The main content area has two dropdown menus: 'Integration Organization' (set to 'RouteOne') and 'Transactions' (set to 'RouteOne Credit Application'). Below these are three sections: 'RouteOne Information' containing a 'RouteOne Login' link, 'Send Credit Application' containing a 'Send' button, and a status message: 'Status: Sent - 10/03/2012 10:16 AM Eastern Standard Time by Andrea Harvey'.

If the username in the employee's file is incorrect, the log in will fail, and you will be directed to a page indicating the page you requested was not found. If you see this page, you should verify the username in the employee's file is correct. If the username is correct and you see this error page, you should contact RouteOne to identify the log in issue.



## Reviewing the RouteOne Transaction Log

Users with administrative rights (those who can access the setup) can review the RouteOne transaction log. This allows you to review which deals were successfully transmitted and which deals did not go through. You can submit deals from the log as needed.

1. Click the **Admin** link at the top of the screen.
2. Click the **Integrations** tab.



3. Click **RouteOne** on the left side of the screen.
4. The right side of the screen displays all the open deals.
5. The **Sent Date** column identifies the date the deal was sent. The column displays “Not Sent” for deals that haven’t been submitted or “Rejected” for deals that RouteOne did not accept.

Route One Integration							
Transactions							
RouteOne Credit Application		Start Purchase Date	03/01/2013	End Purchase Date	03/15/2013		
						<input type="checkbox"/> Show Only Unsent	Filter
Deal #	Stock #	Customer	Address	Vehicle Information	VIN	Sent Date	User
1	C0001	Araujo, Vinicius	3859 West Ave, Orlando, FL 32824	2011 Chevrolet Corvette	1G1YS2DW8B5111867	03/15/2013	Harvey
2	C0002	Trinca, Zach	1548 Main Rd, Charlotte, NC 28274	2011 Chevrolet Tahoe	1G1YS2DW8B5111868	03/15/2013	John
3	20191	Trinca, Justin	456 Independence Rd, Charlotte, NC 28274	2011 Chevrolet Silverado K1500	30CRKSE37AG219597	Not Sent	
4		Pleines, David	7589 East Trade Street, Sharon, PA 16148			Not Sent	
5	C0001	Wisman, Kaysi	1234 Maple Ln, WEST MIDDLESEX, PA 16159	2011 Chevrolet Corvette	1G1YS2DW8B5111867	Not Sent	

Page 1 of 16 View 1 - 5 of 80

6. You can filter the list using the **Start Purchase Date** and **End Purchase Date** options.
7. To view only the deals that have not been sent to RouteOne, click to select the **Show Only Unsent** box and click **Filter**.

8. Click a deal in the list to view a summary of the deal information.
9. You can click **Send** to submit the deal right from this screen.

**INTEGRATIONS**

CUDL

CVR

DealerTrack

RouteOne

TriVIN

**Route One Integration**

Transactions: RouteOne Credit Application Start Purchase Date: 03/01/2013 End Purchase Date: 03/15/2013

Show Only Unsent Filter

Deal #	Stock #	Customer	Address	Vehicle Information	VIN	Sent Date	User
1	C0001	Araujo, Vinicius	3858 West Ave, Orlando, FL 32824	2011 Chevrolet Corvette	1G1YS2DW8B5111867	03/15/2013	Harvey
2	C0002	Trinca, Zach	1548 Main Rd, Charlotte, NC 28274	2011 Chevrolet Tahoe	1G1YS2DW8B5111868	03/15/2013	John
3	20191	Trinca, Justin	458 Independence Rd, Charlotte, NC 28274	2011 Chevrolet Silverado K1500	30CRKSE37A0219597	Not Sent	
4		Pleines, David	7599 East Trade Street, Sharon, PA 16148			Not Sent	
5	C0001	Wisman, Kaysi	1234 Maple Ln, WEST MIDDLESEX, PA 16159	2011 Chevrolet Corvette	1G1YS2DW8B5111867	03/15/2013	John

Page 1 of 16 5 View 1 - 5 of 80

**RouteOne Information**

RouteOne Login

**Deal Information**

Applicant: Kaysi Wisman      Vehicle: 2011 Chevrolet Corvette

Address: 1234 Maple Ln      VIN: 1G1YS2DW8B5111867

City: WEST MIDDLESEX      Stock Number: C0001

State: Pennsylvania

ZIP: 16159

**Credit Application**

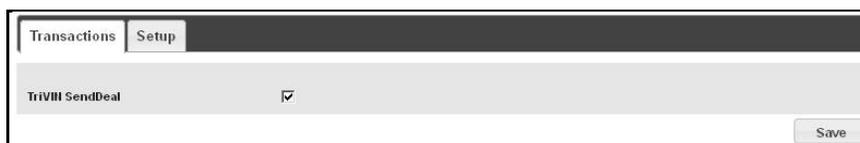
Send      Status: Sent - 03/15/2013 10:54 AM Eastern Standard Time by Sean John

## Appendix J TriVIN

Autosoft Finance program interfaces with TriVIN. Through the interface, you select the deals you want to register, and the Finance system will save the information to an XML file. TriVIN can then pick up the file from the designated directory.

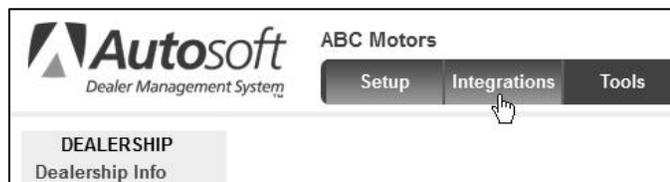
### TriVIN Integration Setup

1. Click **Setup**.
2. Click **Integrations**.
3. Click **TriVIN** in the Integrations list.
4. Click to select **TriVIN Send Deal** on the **Transactions** tab, and click **Save**.



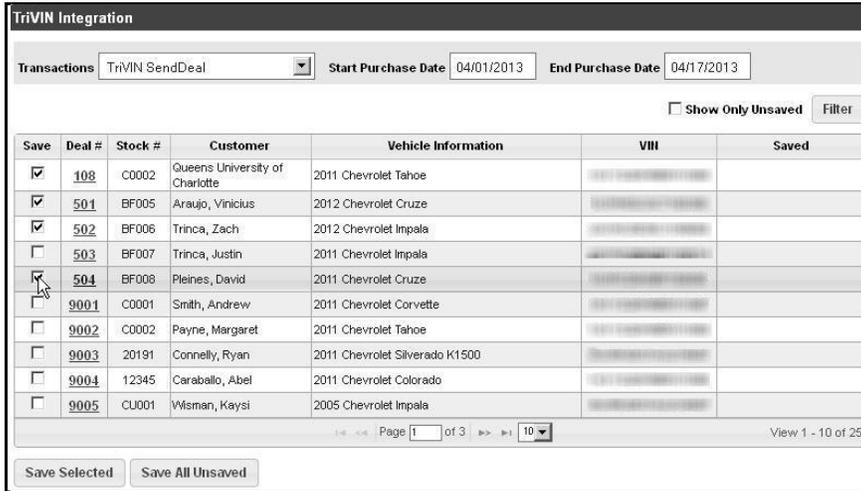
### Generating the XML Files

1. Click the **Admin** link at the top of the screen.
2. Click the **Integrations** tab.

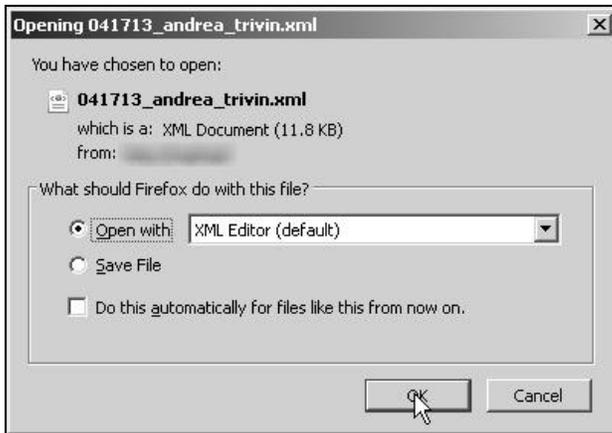


3. Click **TriVIN** on the left side of the screen.
4. The right side of the screen displays all the closed deals.
5. The system lists the deals from the beginning of the current month to date. You can edit the date range as needed by typing the date or selecting the date from the drop-down calendar.

- Click to select the **Save** box for the deals you want to send, and click **Save Selected**. You can also click **Save All Unsaved** if you want to save all the displayed deals to the xml file.



- In the dialog box that appears, click to select **Open with**, and click **OK**.



- The file will open in the default XML editor for your computer, which will most likely be your Internet browser.
- Click **File**, and select **Save As**.
- In the **Save As** dialog, make sure the **Save In** location displays the designated folder. TriVIN designates this location. You must ensure you are saving the XML files in this location in order for TriVIN to pick up the files.
- Click **Save**.
- The **Saved** column on the TriVIN integration screen will identify the file name used for the file, which consists of the date and user name for the user who generated the XML file.