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Introduction to FLEX DMS F&I

Welcome to Autosoft FLEX DMS F&I, a Web-based program that fully integrates with the Autosoft FLEX Dealership Management System (DMS). The program assists you with all the tasks your 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. Additionally, the program saves you time and repeated rekeying of standard information by automatically populating the appropriate boxes with default information you enter during the initial FLEX DMS F&I Setup.

The program is also very versatile, allowing you to enter any type of deal — cash, retail, lease, or wholesale. FLEX DMS F&I can accommodate the additional information necessary for completing a deal, from the bank contracts to the rebates. In addition, the program automatically calculates commission based on the criteria you specify. With FLEX DMS F&I, making sales is fast, efficient, and easy.

Logging In to the Program

The first thing you will do each day is log in to the program. To ensure the security of your data, all users are required to log in 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 FLEX DMS F&I can open the program. You also assign specific access privileges to each user in the Setup, so the username and password used to log on to the program determines what the user can access.

Logging In for the First Time

- 1. Open your Web browser.
- 2. Navigate to https://finance.autosoft-asi.com.

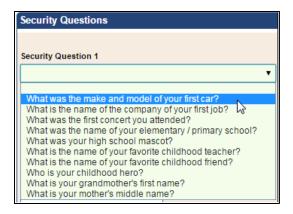
Tip: Bookmark the FLEX DMS F&I login page in your Web browser to avoid having to type the URL each time you log in to the program. Each Web browser has a different method for creating bookmarks; if you're not certain how to create a bookmark in your Web browser, consult the browser's Help page. When the page is bookmarked, you will merely click on the bookmark to go directly to the FLEX DMS F&I login page.

The Autosoft Login screen opens.



4. In the **Username** field, type your assigned user name.

- 5. In the **Password** field, type your assigned password. The password is case sensitive.
- 6. Type the company name in the Company ID field.
- 7. Click Login.
- 8. The program opens.
- 9. You are prompted to select security questions. Use the **Security Question** lists to select the desired security question.

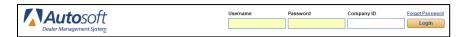


- 10. Use the **Answer** fields to type the answer to your selected security questions.
- 11. Next, type your e-mail address.
- 12. Click Save.
- 13. FLEX DMS F&I opens.

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 an email message containing a link you can use to reset the password. The link is good for one hour from the time you request it. If you receive a reset link in an e-mail message that you did not request, contact Autosoft immediately.

1. Click the Forgot Password link above the Login button.



2. Type your username and e-mail address in the respective fields. The e-mail address you enter should match the one entered in your Employee record in FLEX DMS F&I.



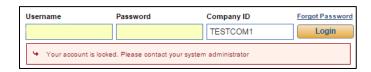
- 3. Click Submit.
- 4. You will receive an e-mail message with a link to reset your password. Click the link, and follow the instructions on the screen.

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 five most recent passwords you have used.

Locking Accounts

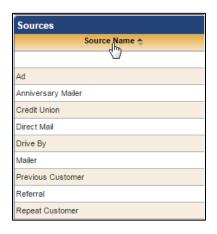
The program automatically locks accounts if the account is not accessed within five days of creation. This is a safety feature. Administrators can unlock the accounts as needed.

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



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).





The bottom of 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 10 or 20 records at a time.



Using Links

FLEX DMS F&I 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 a screen is missing required information. These validation errors ensure the integrity of the data you enter. You cannot save the information you've 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.

Tip:

If you prefer to automatically save information as you move from screen to screen, you can opt to enable auto-save functionality in the Deal, Customers, and Inventory sections of FLEX DMS F&I. When enabled for an individual user, this permission allows data to be saved automatically when the user navigates away from a screen. If the information entered cannot be validated, the user will not be able to leave the screen. To enable this functionality for individual users, you must check the **Ignore Save Dialog** box within the **Roles & Permissions** tab for each employee to whom you would like to grant this permission.

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 log in to the program and use some of the basic features, you are ready to begin using FLEX DMS F&I. Each of the chapters in this manual discusses a specific feature. Read the corresponding chapter in the manual before attempting to use a feature.





Chapter 1

Chapter 1 System Setup

When you create deals, certain pieces of standard information must be entered 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. FLEX DMS F&I 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 can 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 opens.



Adding Dealership Setup Information

The **Dealership** section is where you will enter basic dealership information. The section houses the address and phone numbers for the dealership, as well as your dealership's different stores/locations. You will also use this section of Setup to add employees to the program.

Dealership Info

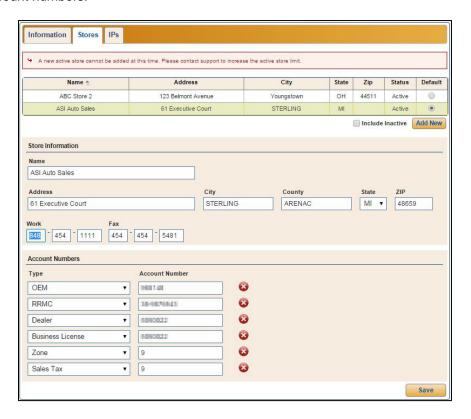
The **Dealership Info** link in the left navigation panel of FLEX DMS F&I's Setup section gives you access to your dealership's address and telephone numbers and store/location details. After clicking on **Dealership Info**, a box will open, displaying the dealership's contact information under the **Information** tab. The contact information within the **Information** tab is for reference only and cannot be edited by the dealership. This information was added by Autosoft. If any details require correction, you will need to contact Autosoft.



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.

Through the **Stores** tab's Account Numbers section, you also can add or remove each location's various account numbers.



Adding Stores

- 1. Click Add New.
- 3. Type the Name, Address, and Work Phone and Fax numbers for the store you are adding.
- 4. Click Save. A green "Success" message verifies the information has been saved.
- 5. The store will appear in the Stores list. The store added by Autosoft is the default store. Click the button in the **Default** column in the row of the store you wish to set as the default store.

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.

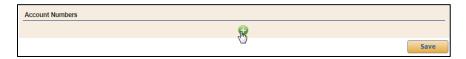
- 1. Select the store.
- 2. Click to clear the Active field.



Click Save to save the information. A green "Success" message verifies the information has been saved.

Adding and Removing Accounts

1. Within the **Account Numbers** section of the **Stores** tab, you can add the various account numbers for your dealership. Click the green + button to add an account number.



- 2. Use the **Type** list to select the account number you are adding: **Business License**, **Dealer**, **OEM**, **RRMC**, **Sales Tax**, or **Zone**.
- Type the account number in the Account Number field.
- 4. Click the red **x** button next to an account number to remove the account number.
- When you are finished adding or removing dealership account information, click Save. A
 green "Success" message verifies the information has been saved.

IPs

An IP address is a unique string of numbers separated by periods that identifies each computer using the Internet Protocol to communicate over a network. Use the IPs tab to establish and maintain a whitelist of approved IP addresses for your employees' computers and devices. Using this whitelist, you can limit access to computers within a specific geographic location.

Important

The IP addresses entered in the IPs tab are whitelisted to access FLEX DMS F&I. The list must be maintained to ensure the correct machines and users can access the application. Once one IP address is entered, <u>ALL</u> IP addresses requiring access <u>MUST</u> be added or they will not be able to use FLEX DMS F&I. However, if the dealer administrator never enters an initial IP address, all IP addresses from any geographic location can access the application.

Adding an IP Address

If you choose to use the IPs tab, you will have to add <u>ALL</u> approved IP addresses to the list using the following steps.

- 1. Click on the IPs tab.
- 2. Click Add New.
- 3. The IP address of the computer on which you are working will auto-populate the **IP Address** field. Click **Save** to add that IP address to the approved list.
- 4. Click **Add New** again to continue to build your list of whitelisted IP addresses.
- 5. Enter another approved IP address in the IP Address field.
- 6. Click Save.
- 7. Repeat steps 4 through 6 until all approved IP addresses have been added.

Tip: The Remote Access checkbox in the **Roles and Permissions** tab within the **Employees** area of the Setup makes the IP filtering functionality more usable, allowing you to set up an IP whitelist applicable to some users while still allowing select employees to access the system remotely, regardless of IP address or location.

Removing an IP Address

You can remove IP addresses from the whitelist when an employee leaves the dealership or the IP address become otherwise obsolete.

- 1. Click the IPs tab.
- 2. Locate in the IP list the IP address you wish to remove.
- 3. Click the red **x** button in the **Remove** column in the row containing the IP address you wish to remove.
- 4. An alert will warn you that the IP address will be permanently deleted. Click **Continue** to remove the IP address.

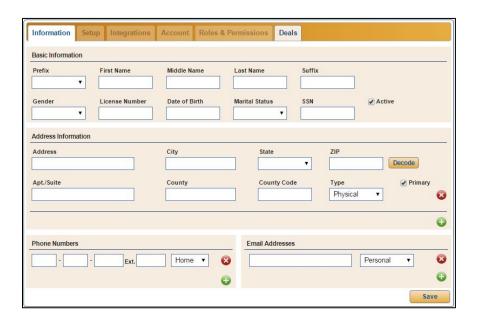
Employees

The Employees setup is where you will add users. Every employee who needs to use FLEX DMS F&I 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 will control access rights here.

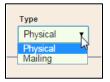


Adding an Employee

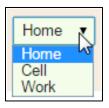
- 1. Click **Employees** under the Dealership heading in the left navigation panel.
- 2. Click Add New.
- 3. In the **Information** tab's **Basic Information** section, type the employee's name and pertinent information. Only the **First Name** and **Last Name** are required.



- 4. Under Address Information, type the address, and use the Type list to designate the address as either a physical or mailing address. You can add both a physical address and a mailing address. The address is optional, but if you choose to add address information for the employee, the State field is required. You can eliminate some keystrokes by entering the zip code for the employee's address into the ZIP field, which will decode the zip code and autopopulate the city and state. If you mistyped the zip code and the city and state do not appear as they should, correct the zip code and click Decode.
- 5. To add another address for the employee, click the green + button and repeat the process. If you list multiple addresses for an employee, be sure to click the **Primary** box for the address you wish to use principally.



6. Use the **Phone Numbers** section to enter the employee's phone numbers. The **Type** defaults to **Home**. Select a different option from the drop-down menu as needed. You can add up to three phone numbers for the employee: **Home**, **Cell**, and **Work**. Click the green **+** button to add additional phone numbers as needed.



- 7. Enter an e-mail address in the **Email Addresses** section. The **Type** defaults to **Personal**. Select a different option as needed. You can add two e-mail addresses for the employee: **Personal** and **Work**. To add an additional email address, click the green + button.
- 8. Click Save. A green "Success" message verifies the information has been saved.
- 9. Click the **Setup** tab.



- 10. In the **Setup** section on this tab, type the individual's employee number, and use the **Title** list to select the employee's job title. If your dealership has multiple stores/locations, select the employee's primary location from the **Default Store** list.
- 11. In the **Commissioning** section, 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.
- 12. 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.
- 13. 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.
- 14. Click Save. A green "Success" message verifies the information has been saved.
- 15. Click the Account tab.



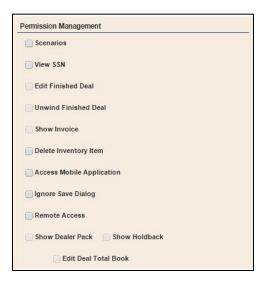
- 16. In the **Account Information** section, type the login name and password for this employee. The employee will use this information to log in to FLEX DMS F&I. Note that the password must meet the criteria listed on the screen.
- 17. Enter an e-mail address for the employee in the Personal Email field.
- 18. Click **Save**. A green "Success" message verifies the information has been saved.

19. Click the Roles & Permissions tab.



- 20. In the **Role Management** section, click to select the role that identifies the access level for this employee. This determines the features the employee can access within the program.
 - **Dealer Principal:** This grants full access to the program, including the ability to access the Employees section of the Admin area, thereby allowing the role to control user accounts.
 - **Finance Admin:** This grants full access to the program; however, Admin rights exclude those associated with the Employees section of the Admin area.
 - **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 only.

21. The **Permission Management** section allows you to give users access to additional items within the program. The features available to the employee are based on the role selected in the previous step. The checkboxes next to unavailable features are grayed out. A checkmark next to a permission indicates it is set for the role. An empty box means the permission is not set. Click to select or to clear the box as needed.



- Scenarios: This allows the employee to use the Scenarios tool to present customers with various deal options.
- View SSN: This allows the employee to view customer social security numbers while
 entering or viewing data in the Applicant screen's Customer Information tab.
 However, for data security, after the SSN field is clicked in, the social security
 number will only display for 10 seconds before being masked.
- Edit Finished Deal: This allows the employee to make changes to finished deals.
- Unwind Finished Deal: This allows the employee to cancel a vehicle sale or lease.
- Show Invoice: This allows the employee to view the invoice price of the vehicle.
- Delete Inventory Item: This allows the employee to delete a vehicle from inventory.
- Access Mobile Application: This allows the employee to access FLEX DMS F&I using the FLEX Mobile application for mobile phones and devices.
- **Ignore Save Dialog:** This allows the employee to move between screens without clicking **Save**. The program will automatically save the information entered on the screen before moving to the next screen. However, when data is incorrect or incomplete, a warning will appear and prompt the user to correct the issue before moving on.
- Remote Access: This allows the employee to access FLEX DMS F&I from any IP address or location regardless of the whether the IP address is on the whitelisted IP address list.

- Show Dealer Pack: This allows the user to view the amount of overhead being deducted from the gross profit on the deal prior to calculating the sales person's commission.
- **Show Holdback:** This allows the employee to view the holdback paid to the dealer by the manufacturer for the vehicle's sale.
- Edit Deal Total Book: This allows the employee to edit the total book cost on the deal.
- 22. Click Save. A green "Success" message verifies the information has been saved.

Tip: Once you have entered account information for the employee, you can use the **Integrations** tab to add log in 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** button next to the item.
- 4. Click **Save** to save the information. A green "Success" message verifies 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.

- 1. Select the employee.
- 2. Click to clear the Active field.



Click Save to save the information. A green "Success" message verifies 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 FLEX DMS F&I.

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



4. Click **Disable User** when prompted to verify you want to disable the user. The **Restore User** button will replace the **Disable User** and **Lock Account** buttons.

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 FLEX DMS F&I.

- 1. Select the employee.
- 2. Click the Account tab.
- 3. Click Restore User.

Locking Accounts

Locking an account prevents a user from logging on to FLEX DMS F&I. Only users with administrative rights can lock accounts.

- 1. Select the employee.
- 2. Click the Account tab.
- 3. Click Lock Account.
- 4. The **Unlock Account** button replaces the **Lock Account** and **Disable User** buttons. A green "Success" message verifies the action was successful.



Unlocking Accounts

If you lock an account, you must unlock it before the user can log on to FLEX DMS F&I. 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 for the employee.

- 1. Select the employee.
- 2. Click the Account tab.
- 3. Click Unlock Account.
- 4. The **Unlock Account** button is replaced by the **Lock Account** and **Disable User** button. A green "Success" message verifies 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, not setup, enabled, and disabled.



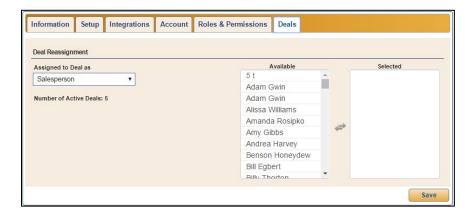
Integrations Tab

The Integrations tab is where the employee's Autosoft-assigned employee number will be displayed, along with usernames for any third-party integrations to which the employee has access.

Deals Tab

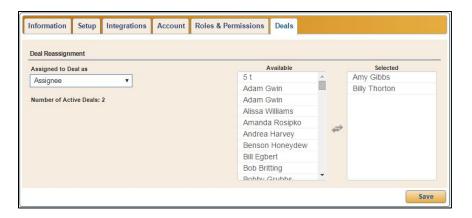
The Deals tab is where you can reassign active deals from an employee to one or more different employees based on role. This functionality is helpful when an employee has left the dealership or is on extended leave. You can choose to reassign all the employee's deals to one selected employee or to assign them to a group of selected employees using a round robin method. If the employee has deals assigned to them under different roles, you can reassign the deals based on role.

- 1. Select the employee from the list of employees.
- 2. Click on the **Deals** tab.



- Use the Assigned to Deal as drop-down menu to select the role under which the employee
 was assigned to the active deals you would like to reassign. The number of active deals
 assigned to the employee under the selected role will be displayed below the field.
- 4. Depending on whether you choose Salesperson, Sales Manager, Finance Manager, or Assignee, the **Available** box will be populated with a list of available employees matching that role to whom the selected employee's deals can be transferred. Click on an employee to whom you would like to assign one or more of the current employee's deals.
- 5. The name you clicked on will be moved to the **Selected** box.

6. If you wish to reassign the employee's deals under that role to more than one employee, repeat steps 4 and 5 as often as you would like. The deals will be divided among the employees you choose using a round robin approach.



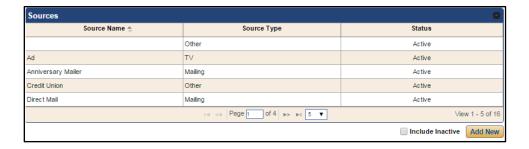
7. Click **Save** to reassign the active deals. A green "Success" message verifies the action was successful.

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 to track how customers learn 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 source type, sources include television stations with which your dealership has purchased advertising. Creating these codes is extremely important for tracking the effectiveness of your various advertising methods



Adding Sources

- 1. Click **Sources** from the Sales section of the left navigation panel.
- 2. Click Add New.
- 3. In **Deal Source**, type the name/description of the source.
- 4. Use the **Type** list to select the source type: Data Import, Internet, Mailing, Other, Phone, Print, Radio, or TV.
- The Active field is automatically selected. You should leave this box checked for new sources.
- Click Save to save the information. A green "Success" message verifies the information has been saved.

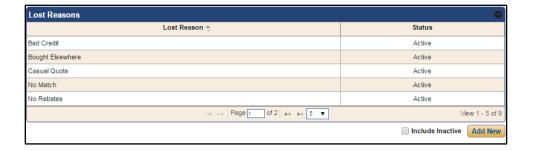
Removing Sources

You cannot delete sources once you create them. You can, however, 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 choose to include inactive items by clicking the **Include Inactive** box when viewing the list.

- 1. Click **Sources** from the Sales section of the left navigation panel.
- 2. Click on the source you wish to mark as inactive in the source list.
- 3. Click to clear the Active field.
- 4. Click **Save** to save the information. A green "Success" message verifies the information has been saved. The source will disappear from the Source list unless you have the **Include Inactive** box checked.

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.



Adding Lost Reasons

- 1. Click **Lost Reasons** from the Sales section in the left navigation panel.
- 2. Click Add New.
- 3. In the Lost Reason field, type the description that identifies why a sale would be lost.
- 4. The **Active** field is automatically selected. You should leave this box checked for new entries.
- 5. Click **Save** to save the information. A green "Success" message verifies 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 Reasons** from the Sales section in the left navigation panel.
- 2. Click the code in the list.
- 3. Click to uncheck the Active box.
- 4. Click **Save** to save the information. A green "Success" message verifies the information has been saved.

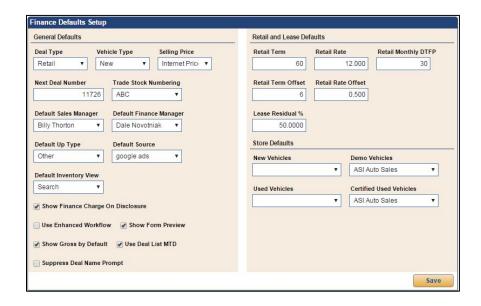
The code will disappear from the Lost Reason list unless you have the **Include Inactive** box checked.

Adding Finance Setup Information

The Finance section contains setup options used by your 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.

Setup

The Finance Defaults Setup window 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 a deal if most deals use the same information.



- Click Setup under the Finance header in the left navigation panel. The Finance Defaults Setup screen will open.
- 2. The **General Defaults** section allows you to set default information that applies to all deals.
 - Use the **Deal Type** menu to select the default deal type: Balloon, Cash, Lease, Retail, or Wholesale.
 - Use the **Vehicle Type** menu to select the default vehicle type: New or Used.
 - Use the Selling Price menu to choose if the selling price is based on the MSRP or Internet Price.
 - In the Next Deal Number field, 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.

- The Trade Stock Numbering menu 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.
- The Default Sales Manager and Default Finance Manager menus 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 Up Type** menu allows you to set a default "up" greeting method. The list includes Internet Up, Other, Phone Up, and Walk-In. While this default will be applied to all deals, you can edit the up type as needed for each deal.
- The **Default Source** menu enables you to set a default source for consumers. The
 list includes all of the active sources you've entered during your Sources setup. While
 this default will be applied to all deals, you can edit the up type as needed for each
 deal.
- The Default Inventory View setting determines which inventory search (Search or Filter) is initially available when you access the vehicle inventory in both the Inventory section of the program and in a deal. Selecting Search will default to search options that allow you to search for a vehicle based on stock number, VIN, invoice number, or order number. This default search method is most useful if you have a specific inventory vehicle in mind when searching.

Filter will default to filter options you can use to filter the inventory list based on vehicle type, inventory status, year, make, model, color and price. This option is more useful when conducting generic searches for inventory vehicles that may meet a variety of customer requirements.





Search

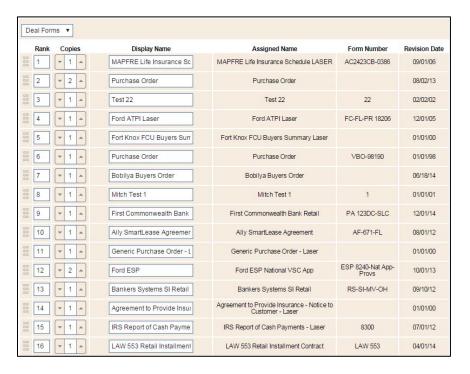
Filter

 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.
- Click the Show Form Preview field to show previews of any deal forms prior to printing them.
- With the Show Gross by Default option, you can default the program to display the
 gross for deals within the Desking portion of the Deals section for users with desking
 roles. You can hide the gross as needed on each deal by clicking the Gross
 checkbox on the bottom right corner of the Desking main screen. When the Show
 Gross by Default field is not checked in Setup, the gross will not be visable
 automatically in the deal unless you click the unmarked (Gross) box in the bottom
 right corner of the Desking main screen.
- Click the Use Deal List MTD field to default the deal list available on both the
 Dashboard section's Home tab and the Deals section's main screen to those deals
 with Start Purchase Dates within the current month. Otherwise, the deal list will be
 comprised of deals with Start Purchase Dates that precede the current date by up to
 30 days.
- Click the Suppress Deal Name Prompt checkbox if you would like to assign generic
 names to deals upon deal creation. If this box is checked, when a new deal is
 created, the tab will be named "New Deal." Once you assign an applicant to the deal,
 the name on the deal tab will be changed to the applicant's last name.
- 3. The **Retail and Lease Defaults** section allows you to set default information for all retail and lease deals in the program. These defaults can be edited as needed for each deal.
 - In **Retail Term**, type the number of months you want to set as the default financing term for retail deals.
 - The Retail Rate field allows you to set a default financing rate. Enter the desired rate.
 - In Retail Monthly DTFP, type the number of days before the first payment will be due.
 - Use the **Retail Term Offset** and the **Retail Rate Offset** fields to specify the default offset value you want to use.
 - Use the Lease Residual % field to specify the default residual for lease deals.
- If you have multiple stores set in the system, use the Store Defaults section to select the
 default store that should be used for the vehicle types listed (New, Demo, Used, and
 Certified Used Vehicles).
- 5. Click **Save** to save the information. A green "Success" message verifies the information has been saved.

Forms

When your dealership's FLEX DMS F&I account is established, Autosoft will work with you to create and format the necessary deal and up forms your dealership will employ within the program. Once the forms have been established, Autosoft will make them accessible in your FLEX DMS F&I account. You can change their ranking and the names by which the forms are displayed in the program in this portion of **Setup**.



Organizing Forms

- 1. Click **Forms** under the Finance heading in the left navigation panel.
- Choose the category of form you would like to work with using the drop-down menu at the top of the screen.

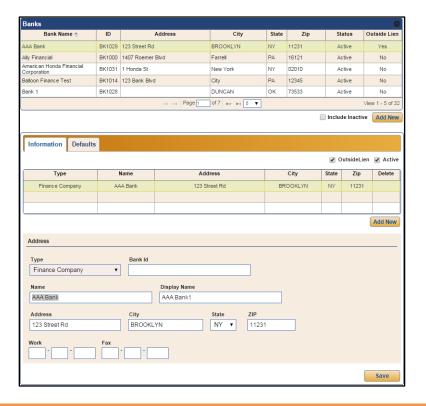


- 3. The list of forms in that category appears.
- 4. To change a form's ranking within the list, click on the **Rank** field for that form and type the rank within the list at which you'd like the form to appear.
- Use the Copies field to determine the default number of copies (from 1 to 9) the program will
 print for each form. Either use the up and down arrows to arrive at the desired number of
 copies for an individual form or type the desired default number of copies in the Copies field.

- 6. While each form has an assigned name, you can create a display name that differs from the assigned name and will appear when the form is referenced in the program. The **Display Name** field defaults to the assigned name. Click on the **Display Name** field and type the name by which you'd like the form to be referenced in FLEX DMS F&I.
- 7. When you have finished making changes to a form's ranking, copy count, and/or display name, click **Save**. The form will appear in the list at the rank you entered, moving the form that previously held that rank to the rank immediately after the moved form.

Banks

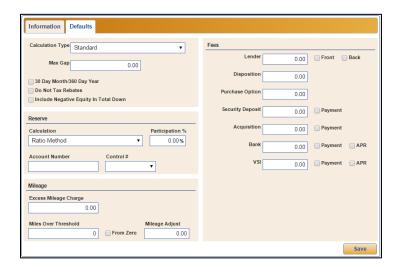
When you add a new bank to the Setup, you must first add the information for the finance company. Then, you can specify the defaults for the finance company that will be used to make calculations when you select to apply this bank to a deal. Once you add the finance company, you can add the lien holder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



Tip: The **ID** field contains a system-assigned ID for each bank. This bank's ID is used as a unique identifier for third-party integrations. To ensure that these IDs are entered correctly in third-party integrations, export a complete list of the IDs using the Export Sequence Numbers utility. (See Appendix G Export Sequence Numbers Utility.)

Adding Banks

- 1. Click **Banks** under the Finance heading in the left navigation panel.
- 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 because 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 field. A name is the minimum information required to add a bank.
- 6. In the **Display Name** field, type the name you want to appear for the bank 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 optional entries.
- 9. Use the **Outside Lien** checkbox at the top right of the **Information** tab 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. A green "Success" message verifies the information has been saved.
- 12. The bank you added appears in a secondary table inside the **Information** tab, 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.

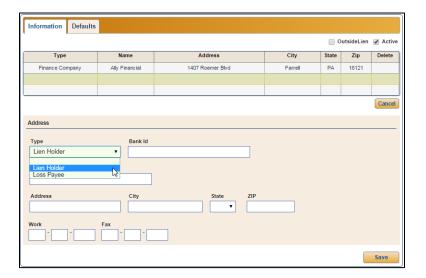


13. Click **Save** to save the information. A green "Success" message verifies the information has been saved.

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 table under the Information tab, click Add New under the table.
- 2. 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.



- 3. Type the name associated with this branch of the bank.
- 4. Complete the address and phone fields as needed.
- 5. Click **Save** to save the information. A green "Success" message verifies the information has been saved.
- 6. The **Default** tab is now available. Enter the information as needed.
- 7. Click **Save** to save the information. A green "Success" message verifies the information has been saved.

Removing a Bank

You cannot delete the finance company. 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 under the Finance heading in the left navigation panel.
- 2. In the Banks list, click on the bank you wish to make inactive.
- 3. Click to clear the **Active** checkbox at the top of the **Information** tab.



Click Save to save the information. A green "Success" message verifies the information has been saved.

Removing a Bank's Lien Holder or Loss Payee

While you cannot delete a finance company, you can delete the lien holder or loss payee for a bank.

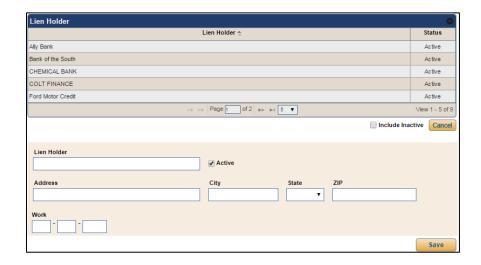
- 1. Click **Banks** under the Finance heading in the left navigation panel.
- 2. In the Banks list, click on the bank for which you wish to delete the lien holder or loss payee.
- 3. In the list inside the **Information** tab, the lien holder and loss payee each have a red **X** button in the **Delete** column. Click the red **X** button to delete the entry.



- The program prompts you that this action will permanently delete the bank company. Click Continue to acknowledge the message and to delete the bank.
- 5. Click **Save** to save the information. A green "Success" message verifies the information has been saved.

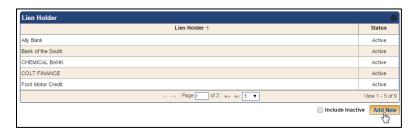
Trade Lien Holder

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.



Adding a Trade Lien Holder

- 1. Click **Trade Lien Holder** under the **Banks** link in the Finance section of the left navigation panel.
- 2. Click Add New.



- 3. In the Lien Holder field, 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 the Work field, 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. A green "Success" message verifies the information has been saved.

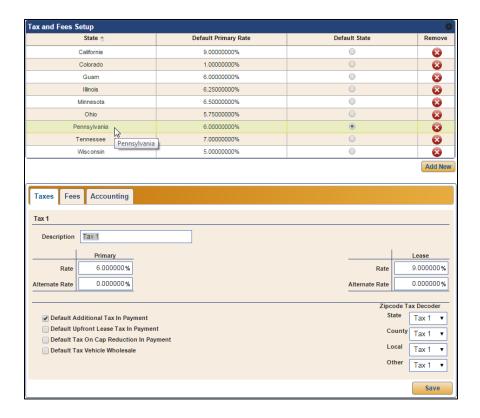
Removing Trade Lien Holders

You cannot delete lien holders once you've created them. You can, however, flag a lien holder as inactive so it no longer appears in the lien holder list. The inactive lien holder will 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 Trade Lien Holder under the Finance header in the left navigation panel.
- 2. In the Lien Holder list, click on the lien holder you wish to make inactive.
- Click to clear the Active field.
- 4. Click **Save** to save the information. A green "Success" message verifies the information has been saved.

Taxes & Fees

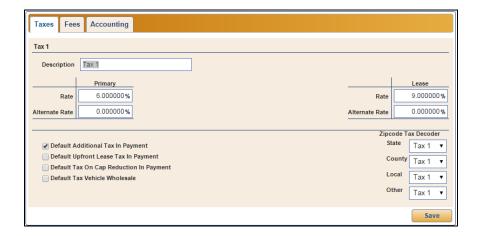
The Taxes & Fees setup is where you will specify the state tax schemes you will use. You can select to add all the states whose taxing you will need to use. Once you add a state and set the taxing defaults, you can add the fees for the state. When you select the state for a deal, the taxing and fees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



Tip: By default, the first state you add becomes the default state. Click to select the **Default State** 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.

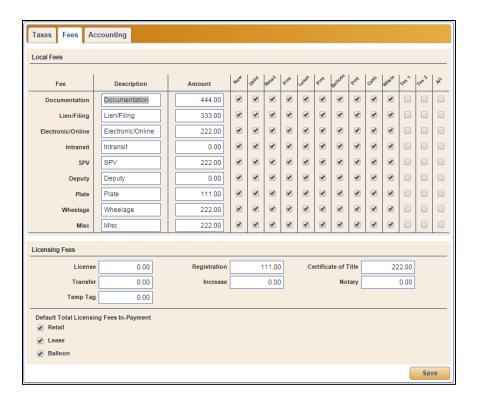
Adding States

- 1. Click **Taxes & Fees** under the Finance heading in the left navigation panel.
- 2. Click Add New.
- The Add State window opens containing a list of states that have not been added to your FLES DMS F&I. Click on the state you wish to add. To add multiple states at once, hold the CTRL button on your keyboard and click on all the states you'd like to add using the left mouse button.
- 4. Click Add State.
- 5. A box will open below the Tax and Fees Setup table. The **Taxes** tab within that box displays the taxing the state uses. Each state will use different taxes, so the fields displayed on this tab may vary from the image below. You can type a description for each tax if desired.



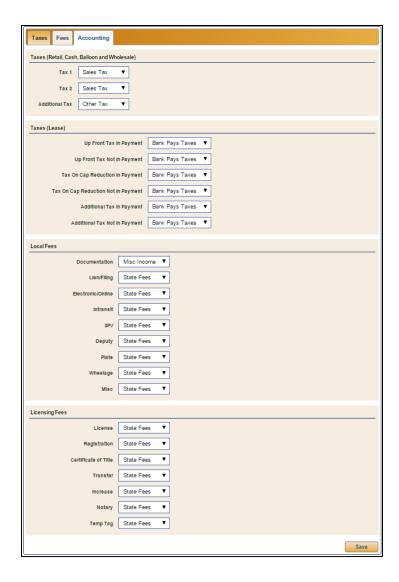
- 6. Click to select the **Default Additional Tax In Payment** box to include the tax in the payment.
- 7. Click to select the **Default Upfront Lease Tax In Payment** to include this tax in the payment.
- 8. Click to select the **Default Tax On Cap Reduction In Payment** to include this amount in the payment.
- 9. Click to select the **Default Tax Vehicle Wholesale** if the state taxes wholesale sales.
- 10. If the state has multiple taxes, use the **ZIP Code Tax Decoder State**, **County**, **Local**, and **Other** lists to specify the rate that 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.
- 11. Click **Save** to save the information. A green "Success" message verifies the information has been saved.

12. Click the **Fees** tab. 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.



- 13. In the Local Fees section, enter the fees and amounts charged by the state.
- 14. Click to select the deal types that require the fee and specify if the fee should be added to the payment.
- 15. Click to select the taxes that apply to the fee.
- 16. In the **Licensing Fees** section, enter any licensing fees that apply.
- 17. In the **Default Total Licensing Fees In-Payment** section, click to select the deal types that require the licensing fees to be included in the payment.
- 18. Click **Save** to save the information. A green "Success" message verifies the information has been saved.

19. Click the **Accounting** tab. 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.



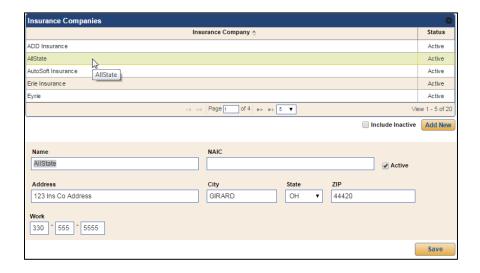
20. Click **Save** to save the information. A green "Success" message verifies the information has been saved.

Removing a State

- 1. Click Taxes & Fees under the Finance heading in the left navigation panel.
- 2. Click the red **X** button in the **Remove** column for the state you wish to delete.
- 3. 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.



Adding Insurance Companies

- 1. Click **Insurance Co** under the Finance header in the left navigation panel.
- 2. Click **Add New**. Fields display on the bottom of the screen.
- 3. Type the insurance company name in the **Name** field.
- 4. Enter the insurance companies National Association of Insurance Commissioners number in the **NAIC** field.
- 5. The **Active** field is automatically selected. Leave this setting for new insurance companies.
- 6. The address is optional, but if you select to add address information for the insurance company, the **State** field is required.
- 7. Type the insurance company phone number in the **Work** field. This information is optional.
- 8. Click **Save** to save the information. A green "Success" message verifies the information has been saved.

Removing an Insurance Company

Once you have added an insurance company to the Setup, you cannot delete it. You can, however, flag the insurance company as inactive so it no longer appears in the Insurance Companies list. The insurance company will also not display in the Insurance Companies list in the Setup unless you choose to include inactive items by clicking the **Include Inactive** box when viewing the list.

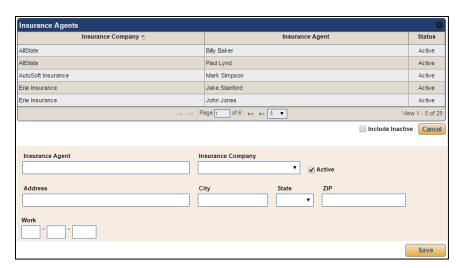
- 1. Click **Insurance Co** under the Finance header in the left navigation panel.
- 2. Click the company you wish to make inactive from the Insurance Companies list.
- 3. Click to clear the Active field.
- 4. Click **Save** to save the information. A green "Success" message verifies the information has been saved.

Adding Insurance Agents

- 1. Click **Insurance Agent** under the Finance header in the left navigation panel.
- 2. Click Add New.



3. Fields display on the bottom of the screen. Type the insurance agent's name in the **Insurance Agent** field. This is a required entry.



- 4. Use the **Insurance Company** drop-down menu to select the company for which this agent works. The list includes all the insurance companies you added during 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** field is required.
- 7. Click **Save** to save the information. A green "Success" message will verify the information has been saved.

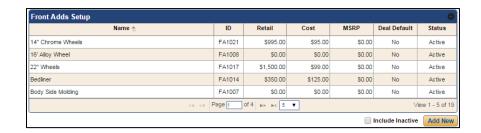
Removing an Agent

Once you have added an insurance agent to the Setup, you cannot delete the agent. You can, however, flag the insurance agent as inactive so he or she 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 under the Finance header in the left navigation panel.
- 2. Select the agent from the list.
- Click to clear the Active field.
- Click Save to save the information. A green "Success" message will verify the information has been saved.

Front Adds

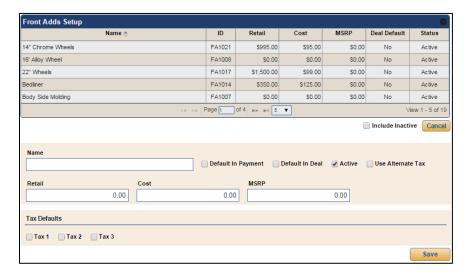
This is where you enter the front adds you will apply to deals. You can enter an unlimited number of front adds.



Tip: The **ID** field contains a system-assigned ID for each front add. This object ID is used as a unique identifier for the item for third-party integrations. To ensure that these IDs are entered correctly in third-party integrations, export a complete list of the IDs using the Export Sequence Numbers utility. (See Appendix G Export Sequence Numbers Utility.)

Adding a New Item

- 1. Click **Front Adds** under the Finance heading in the left navigation panel.
- 2. Click **Add New**. Fields display on the bottom of the screen.



- 3. Type a name/description for the item in the **Name** field.
- 4. Click **Default in Payment** if this item should be added to the payment.
- 5. Click the **Default In Deal** checkbox to automatically add this item to new deals.
- 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, instead of the standard tax rate, the alternate tax rate set for the taxing state will be used to calculate the tax for the front add.
- 8. Next, specify the **Retail** price, **Cost**, and **MSRP** for the item.
- 9. Use the **Tax Defaults** section to specify the taxing that applies to this item.
- Click Save to save the information. A green "Success" message will verify the information has been saved.

Removing Items

You cannot delete front adds once you have added them to the Setup. However, you can 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** in the left navigation panel.
- 2. Select the item from the Front Adds list.
- Click to clear the Active field.
- 4. Click **Save** to save the information. A green "Success" message will verify the information has been saved.

Back Adds

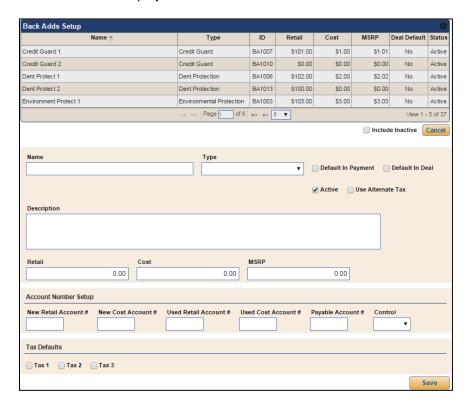
This is where you enter the back adds you will apply to deals. You can enter an unlimited number of back adds.



Tip: The **ID** field contains a system-assigned ID for each back add. This object ID is used as a unique identifier for the item for third-party integrations. To ensure that these IDs are entered correctly in third-party integrations, export a complete list of the IDs using the Export Sequence Numbers utility. (See Appendix G Export Sequence Numbers Utility.)

Adding a New Item

- 1. Click **Back Adds** under the Finance header in the left navigation panel.
- 2. Click **Add New**. Fields display on the bottom of the screen.



3. Type a name for the item in the **Name** field.

- 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. Click the **Default In Deal** checkbox to automatically add this item to new deals.
- 7. The Active field is automatically selected. You should leave this setting for new back adds.
- 8. The **Use Alternate Tax** field allows you to apply the alternate tax rate to the back add. If you select this option, instead of the standard tax rate, the alternate tax rate set for the taxing state will be used to calculate the tax for the back add.
- 9. Use the **Description** field to provide an explanation for the back add.
- 10. 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 the Autosoft FLEX 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. A green "Success" message will verify the information has been saved.

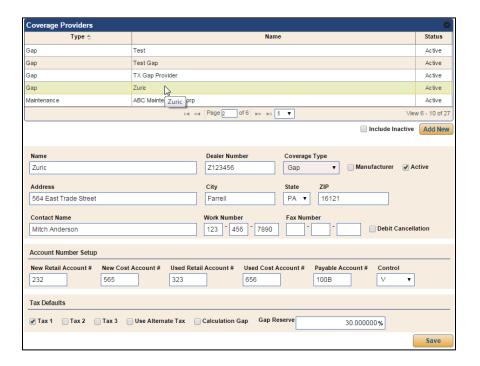
Removing Items

You cannot delete back adds once you have added them to the Setup. However, you can 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 in the left navigation panel.
- 2. Select the item from the Back Adds list.
- 3. Click to clear the Active field.
- 4. Click **Save** to save the information. A green "Success" message will verify the information has been saved.

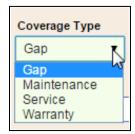
Coverage Providers

Coverage providers are the vendors who provide the services 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 providers offer.



Adding Providers

- 1. Click Coverage Providers under the Finance header in the left navigation panel.
- 2. Click **Add New**. Fields display on the bottom of the screen.
- 3. Enter the provider's name in the **Name** field. 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 provider offers. This is a required entry.



- 6. If this is a manufacturer coverage provider, click to select the **Manufacturer** box.
- 7. The **Active** field is automatically selected. Leave this setting for new providers.
- 8. The remaining information in this section is optional. However, if you add an address, the **State** is required.
- The Account Number Setup section allows you to specify the general ledger account
 numbers used to post services to the books in the Autosoft FLEX 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. (The **Calculation Gap** and **Gap Reserve** fields apply to Texas only.)
- 11. Click **Save** to save the information. A green "Success" message will verify the information has been saved.

Removing Providers

You cannot delete providers once you have added them to the Setup. You can, however, 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 from the left navigation panel.
- Select the provider from the Coverage Providers list.
- 3. Click to clear the Active field.
- 4. Click **Save** to save the information. A green "Success" message will verify the information has been saved.

Adding Plans

1. From the list of plans under the **Coverage Providers** link in the left navigation panel, click the plan type you wish to add.



- 2. Click **Add New** under the plans list that opens. 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 active coverage providers flagged as the selected provider type (Gap, Service, Warranty, or Maintenance) in Setup.



- 5. The **Active** field is automatically selected. Leave this setting for new plans.
- 6. Click the **Default In Deal** checkbox to automatically add the plan to new deals.
- 7. Type a description for the plan in the **Description** field.
- 8. Use the **Retail** field to enter the coverage plan's retail price to be applied to the deal.
- 9. Enter the cost of the coverage plan in the **Cost** field.
- 10. Click **Save** to save the information. A green "Success" message will verify 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 object ID is used as a unique identifier for the item for third-party integrations. To ensure that these IDs are entered correctly in third-party integrations, export a complete list of the IDs using the Export Sequence Numbers utility. (See Appendix G Export Sequence Numbers Utility.)

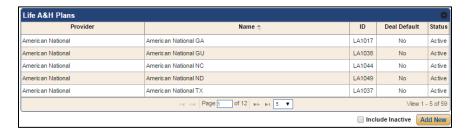
Removing Plans

You cannot delete plans once you have added them to the Setup. However, you can 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 in the left navigation panel.
- 2. Select the plan from the list of plans of that type.
- 3. Click to clear the plan's Active field.
- 4. Click **Save** to save the information. A green "Success" message will verify the information has been saved.

Life A&H

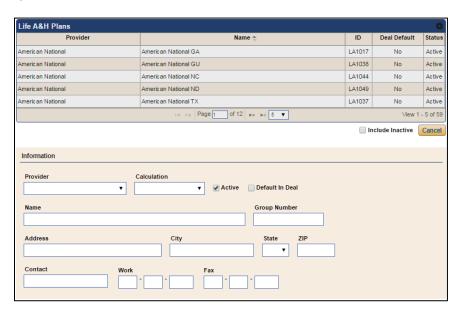
Autosoft installs the Life A&H providers for you. This is where you create the life rate plans your dealership sells. You can obtain the information for life insurance and disability from the life insurance provider.



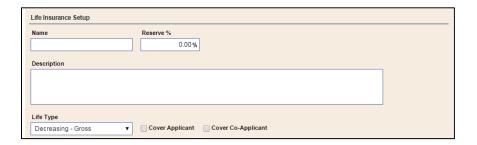
Tip: The **ID** field contains a system-assigned object ID for each Life A&H plan. This ID is used as a unique identifier for the plan for third-party integrations. To ensure that these IDs are entered correctly in third-party integrations, export a complete list of the IDs using the Export Sequence Numbers utility. (See Appendix G Export Sequence Numbers Utility.)

Adding a New Plan

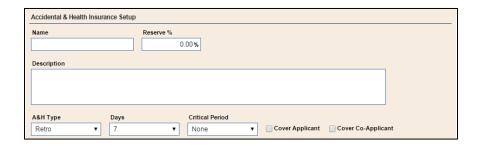
- 1. Click Life A&H under the Finance header in the left navigation panel.
- 2. Click **Add New**. Fields display on the bottom of the screen.
- 3. In the **Information** section, select the provider from the **Provider** list. This is a required entry. If your provider is not listed, contact Autosoft.



- 4. Use the **Calculation** list to select the calculation method this provider uses for this plan. This is a required entry. If your calculation is not listed, contact Autosoft.
- 5. The **Active** field is automatically selected. Leave this setting for new plans.
- 6. Click the **Default In Deal** checkbox to automatically add the plan to new deals.
- 7. Enter the plan name in the **Name** field, which is a required entry.
- 8. Enter the group number in the **Group Number** field.
- 9. The remaining information in this section is optional. However, if you add an address, the **State** is a required entry.
- 10. In the **Life Insurance Setup** section, type the name for the life plan in the **Name** field. This is a required field.



- 11. Enter the reserve in the **Reserve** field. This is an optional field.
- 12. Add a **Description** of the plan as needed. These are optional entries.
- 13. Choose the appropriate plan type from the **Life Type** menu. The field automatically defaults to **Decreasing Gross** if not changed.
- 14. Use the **Cover Applicant** and **Cover Co-Applicant** boxes to default the coverage you wish to set for this provider.
- 15. In the **Accidental & Health Insurance Setup** section, enter the name for the plan in the **Name** field. This is a required field.



- 16. Enter the reserve in the Reserve field.
- 17. Add a **Description** of the plan as needed. This is an optional field.

- 18. The A&H Type defaults to Retro. Leave this entry or select Non-Retro as needed.
- 19. Select the length of the waiting period using the **Days** field, which defaults to 7. Leave this selection or choose 14 or 30 as needed.
- The Critical Period defaults to None. Leave this entry or select 12 Month, 24 Month, 36 Month, or 48 Month.
- 21. Use the **Cover Applicant** and **Cover Co-Applicant** boxes to default the coverage you want for this plan.
- 22. Click **Save** to save the information. A green "Success" message will verify the information has been saved.

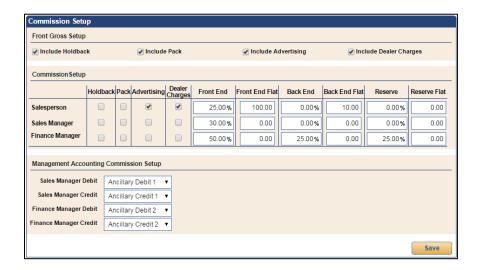
Removing Plans

You cannot delete plans once you have added them to the Setup. You can, however, flag the plan as inactive so it no longer appears in the Life, Accidental & Health Insurance **Provider** list when adding Life A&H coverage to a deal. The plan will also not display in the Life A&H Plans list in the Setup unless you select to include inactive plans by clicking the **Include Inactive** box when viewing the list.

- 1. Click Life A&H from the left navigation panel.
- 2. Select the plan from the Life A&H Plans list.
- 3. Click to clear the Active field.
- Click Save to save the information. A green "Success" message will verify the information has been saved.

Commissioning

The **Commissioning** Setup is where you add general commission defaults. This information will be used to calculate commission unless an individual employee has his or her commission set in their employee Setup. The program always uses the individual employee commission settings first. The program only uses the settings entered here if no individual commission settings exist.



- 1. Click **Commissioning** under the Finance header in the left navigation panel.
- 2. In the **Front Gross Setup** section, click to select the items that should be included in the front gross.
- 3. Under **Commission Setup**, click to select the items (holdback, pack, advertising, and dealer charges) available for commission for the salespeople, sales managers, and finance managers.
- 4. Specify the percentages and flat rates that apply for front end, back end, and reserve portions of deals.
- 5. The **Management Accounting Commission Setup** section allows you to specify the ancillary accounts used to post commissions to the books in the Autosoft FLEX DMS Accounting module. Choose the appropriate ancillary accounts, and the commissions will automatically post to the specified accounts.
- 6. Click **Save** to save the information. A green "Success" message will verify the information has been saved.

Finishing up

As your dealership's needs change, you can edit the setup information at any time, adding or removing information as necessary. Simply return to the corresponding area in the Setup and add, edit, or remove the information as described in this chapter.

When you are finished in the Setup, click the **Dashboard** link at the top of the screen. You are ready to begin learning how to use the program. The remaining chapters will cover each feature in the program.

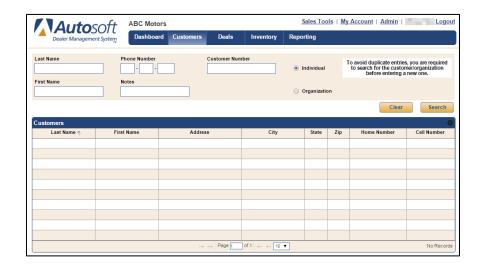


Customers



Chapter 2 Customers

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



Customers vs. Ups

Customers in FLEX DMS F&I 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 is associated with a deal, the individual becomes an up.

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.





Chapter 4

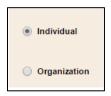
Searching for Customers

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 blue toolbar at the top of the screen.



2. The Search screen opens. Click to select if you are searching for an **Individual** or **Organization**. The fields that display depend on the option you select.



- 3. Type the information you wish to use to search for the customer. Keep the following guidelines in mind.
 - When typing partial entries in the Name fields, the program will provide results for all customer names containing the partial search criteria.
 - If you select to search by a phone number, you must type at least three digits in the box.
 - When searching for an organization using the **Notes** field, you must type three consecutive characters, uninterrupted by spaces.
- 4. Click **Search**. A list of customers who meet the criteria you specify opens.

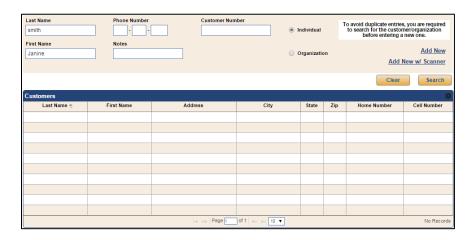


5. Double-click a customer in the list to view the customer's summary.

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

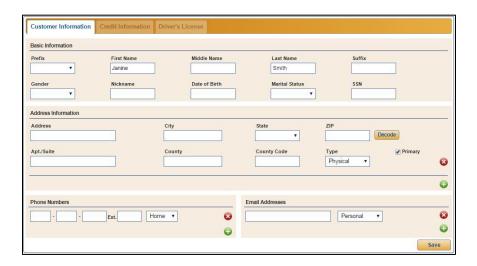
Adding an Individual

- 1. Search for the individual as explained in the previous section.
- 2. If the individual is not found during the search, click the **Add New** link that appears in the bottom right corner of the search portion the window.



Tip: You can also add a new customer using a driver's license scanner. See *Appendix D Driver's License Scanner* for information about using a driver's license scanner with FLEX DMS F&I in.

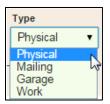
3. The **Customer Information** tab opens, containing only the information you entered as search criteria.



4. Use the **Basic Information** section to add the customer's name, gender, date of birth, marital status, and social security number. The information in this section is not mandatory.

Note: Once a user has entered a customer's social security number in the **SSN** field, FLEX DMS F&I masks the number for the customer's protection. However, users with sufficient permissions can view an applicant's or co-applicant's social security number on the customer information screen by simply clicking into the **SSN** field. The number will display for one minute before being masked again.

5. Enter an address for the customer in the **Address Information** section. Use the **Type** field, which defaults to Physical, to select the appropriate description for the address. You can add as many as four addresses per individual: physical, mailing, garage, and work. Click the green + button to add additional addresses as needed.

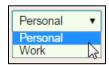


Tip: Once you type the street address, you can type the ZIP code in the ZIP field and click the **Decode** button. The ZIP decoder will decode the ZIP code and provide city, state, and county options for you to select. The corresponding fields will fill in with the selected data.

6. Add a phone number in the **Phone Numbers** section. The **Type** defaults to Home. Select a different option as needed. You can add as many as four phone numbers per individual: home, cell, work, and fax. Click the green + button to add additional phone numbers as needed.



7. Add an e-mail address in the **Email Addresses** section. The **Type** defaults to Personal. Select a different option as needed. You can add two e-mail addresses per individual: personal and work. Click the green + button to add an additional e-mail address if required.

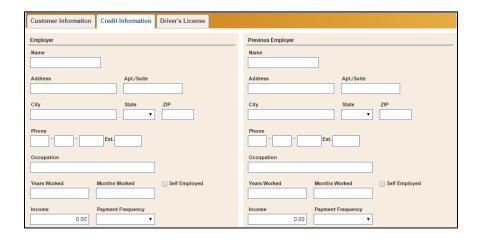


8. Click **Save** to save the information. A green "Success" message verifies the information has been saved.

Adding Credit Information

Once you add customer information, the **Credit Information** tab becomes available. Here, you'll enter credit information that will be used to run credit checks and complete financing. This is optional based on the customer's needs from your dealership.

- 1. Click the Credit Information tab.
- Use the Employer and Previous Employer sections to record the customer's employment information.



3. In the **Income** section, enter the financial information requested.

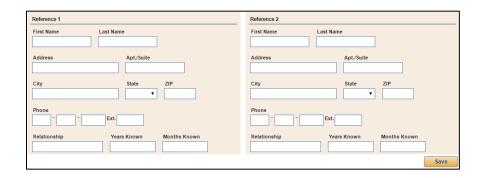


4. Use the **Current Residence** section to add the financial information pertaining to the customer's current address. This section only appears if you have added a physical address for the customer.



5. In the **Previous Residence** section, enter the appropriate addresses and residency information.

6. In the **Reference 1** and **Reference 2** sections, enter the information for the references the customer wishes to use.



Click Save to save the information. A green "Success" message will verify the information has been saved.

Adding Driver's License Information

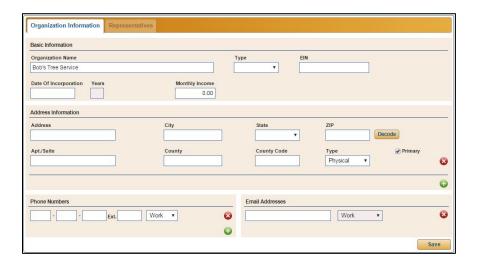
1. Click the Driver's License tab.



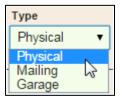
- 2. The **Driver's License Image** section will display the images added through the driver's license scanner. See *Appendix D Driver's License Scanner* for information about using a driver's license scanner with FLEX DMS F&I.
- 3. If you scanned the customer's driver's license, the fields in the **Driver's License Information** section will automatically populate with the information taken from the scan. However you can use this area to enter the driver's license information manually without scanning.
- 4. Type the license number in the **Driver's License Number** field.
- 5. Use the **State** list to select the licensing state.
- 6. Enter the expiration and issue dates in the corresponding fields.
- 7. Click Save. A green "Success" message will verify the information has been saved.

Adding an Organization

- 1. Search for the organization as explained in the earlier section, "Searching for Customers."
- 2. If the search does not result in a match to your customer search, click the **Add New** link in the bottom right corner of the search area.
- 3. The **Organization Information** tab opens containing the search criteria you entered for the organization.



- 4. Add the remaining organization information in the **Basic Information** section.
- 5. Use the **Address Information** section to add an address for the organization. Use the **Type** field, which defaults to Physical, to select the appropriate description for the address. You can add as many as three addresses per organization: physical, mailing, and garage. Click the green + button to add additional addresses as needed.



Tip: Once you type the street address, you can type the ZIP code in the ZIP field and click the **Decode** button. 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. In the **Phone Numbers** section, enter a phone number for the organization. The **Type** defaults to Work. However, you can choose Fax as needed. You can add both work and fax numbers for the organization. Click the green + to add an additional phone number as needed.

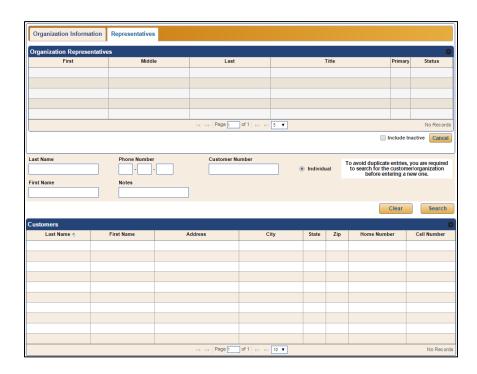


- 7. Enter an e-mail address in the **Email Addresses** section. The only e-mail address type for an organization is Work, and you can only add one e-mail address.
- 8. Click **Save** to save the information. A green "Success" message will verify the information has been saved.

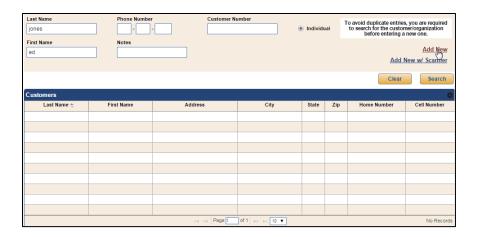
Adding Representatives to an Organization

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

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



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.)



5. Additional fields will open at the bottom of the screen in place of the Customers list. Under **Basic Information**, type the customer's information.



- 6. Use the **Title** field to identify the representative's title within the organization.
- 7. If you will be adding more than one representative to an organization, use the **Primary** box to flag the primary representative for the organization.
- 8. The **Active** field is automatically selected. Leave this setting for new representatives.
- In the Address Information section, enter the representative's address. The Type defaults
 to Physical. Select a different option as needed. You can add as many as four addresses per
 individual: physical, mailing, garage, and work. Click the green + button to add additional
 addresses if required.

Tip: Once you type the street address, you can type the ZIP code in the **ZIP** field and click the **Decode** button. 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.

- 10. Add a phone number in the **Phone Numbers** section. The **Type** defaults to Home. Select a different option as needed. You can add as many as four phone numbers per individual: home, cell, work, and fax. Click the green + button to add additional phone numbers as required.
- 11. In the **Email Addresses** section, add up to two e-mail addresses: personal and work. When you enter an e-mail address, the **Type** defaults to Home. Select a different option as needed. Click the green + button to add a second e-mail address as needed.
- 12. Click **Save** to save the information. A green "Success" message will verify the information has been saved.

Editing Customer Information

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



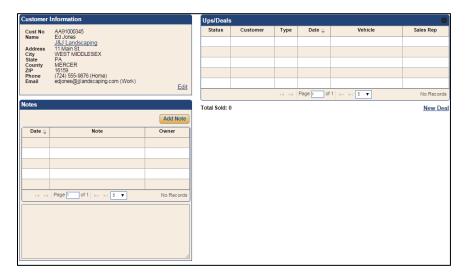
- 4. Edit the information as needed.
- 5. Click **Save** to save the changes.
- 6. A green "Success" message will verify that the information has been saved.

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. To ensure that these IDs are entered correctly in third-party integrations, export a complete list of the IDs using the Export Sequence Numbers utility. (See Appendix G Export Sequence Numbers Utility.)

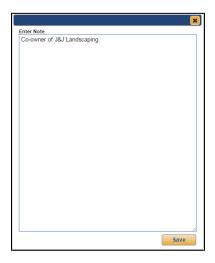
Adding Notes

Notes allow you to add pertinent information to a customer's record. This can be general information about the customer that you want to keep on hand 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 Customers list.
- 3. The customer's summary appears.



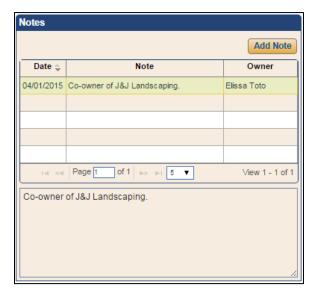
- 4. In the Notes box, click Add Note.
- 5. Type the note you wish to add.



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

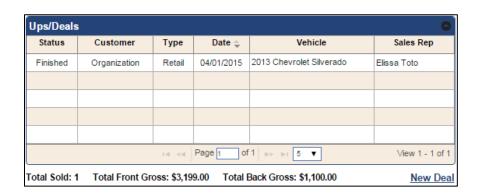
Viewing Notes

In the **Notes** box, click on the note you wish to view from the list. The detail will display in the window at the bottom of the **Notes** section. You cannot edit notes.



Viewing Ups/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 **Ups/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 the **New Deal** link under the Ups/Deals box. This opens a new deal and automatically adds the customer as the applicant. (See Chapter 4 Deals for details about working a deal.)



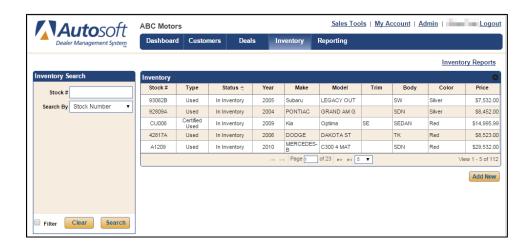




Chapter 3

Chapter 3 Inventory

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



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

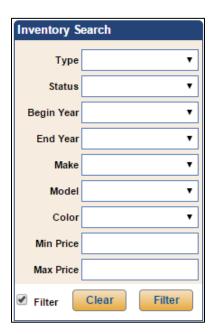
Filtering the Inventory List

By default, the screen displays all vehicles in the inventory. The fields in the **Inventory Search** box 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** from the blue toolbar at the top of the screen.



- 2. In the **Inventory Search** box, click the **Filter** checkbox.
- 3. Type or use the drop-down menus to select the search criteria you wish to use. You can enter as much or as little information as you want.

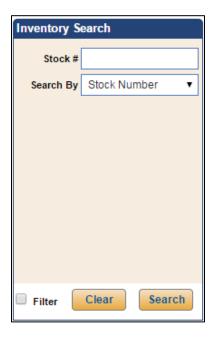


- 4. Click Filter.
- 5. The **Inventory** box to the right of the **Inventory Search** box lists the dealership's vehicles that match your search criteria.
- 6. Click on a vehicle to view its detail. The detail displays on the bottom of the screen.

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 particular vehicle in inventory.

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



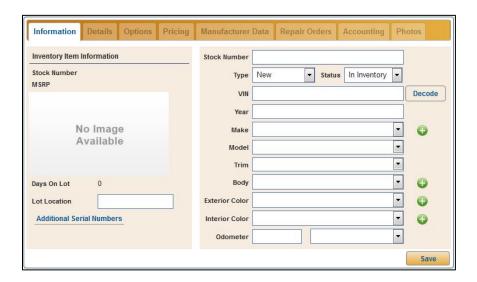
- 2. Use the **Search By** drop-down menu to select the specific data you want to use for the search: stock number, last six characters of the VIN, invoice number, or order number.
- 3. The label for the top field changes based on the search criteria you select. Type the appropriate data in this field.
- 4. Click Search.
- 6. The Inventory list to the right of the **Inventory Search** box contains 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 FLEX DMS F&I, 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 FLEX DMS inventory sync.

- 1. Click Inventory.
- 2. Click **Add New** under the Inventory list.
- Use the Information tab to add the basic vehicle information. The Stock Number, Type, Year, Make, and Model are required fields.

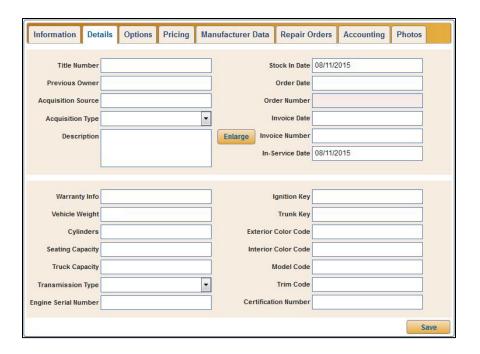
You can add an item to any drop-down menu with a green + button next to it. Click the + button, type the information you wish to add, and click **Add**. The item is added to the menu.



Tip: Once you type the VIN, you can click the **Decode** button to use the VIN decoder to fill in the year, make, and model for the vehicle. If you type an invalid VIN, the system will notify you.

- 4. If additional serial numbers are associated with the vehicle, such as a trailer or other equipment, click the **Additional Serial Numbers** link at the bottom of the **Inventory Item Information** box.
- 5. In the **Additional Serial Numbers** box, click the green **+** button to add a serial number associated with the vehicle.
- 6. Enter a description of the inventory item associated with the vehicle in the **Description** field.
- 7. In the **Serial Number** field, enter the inventory item's serial number.
- 8. Click Save.

- 9. If you know the location of the vehicle on the lot, use the **Lot Location** field to enter that information.
- 10. Click Save. A green "Success" message will verify that the information has been saved.
- 11. 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.

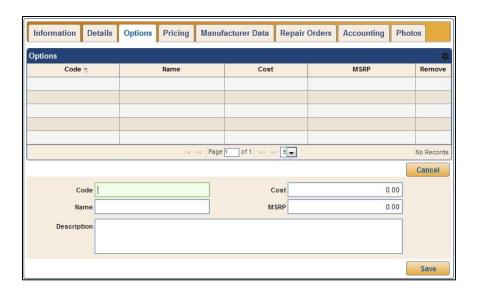


Tip: Large amounts of data can be entered in the **Description** field. You can click the **Enlarge** button next to the **Description** field to open a secondary window that allows you to view large amounts of data more easily.

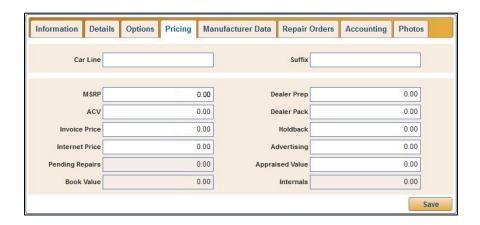
- 12. Click **Save** to save the information entered on this tab. A green "Success" message will verify the information has been saved.
- 13. The **Options** tab is where you can add the options available on the vehicle.



- 14. To add an option, click Add New.
- 15. Add the information for the option. You must add either an option code or option name for each option.



- 16. Click Save. The option will display in the options list.
- 17. The **Pricing** tab is where you add the pricing information for the vehicle. The lightly shaded fields are unavailable for editing because these fields display accounting figures that must be updated through the FLEX DMS Accounting module or through manufacturer vehicle invoice interfaces.



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

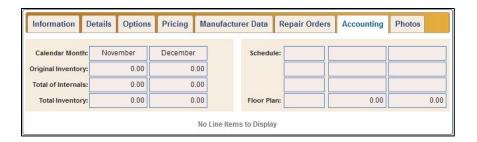
 Click Save to save the information entered on this tab. A green "Success" message will verify the information has been saved. 19. If you use manufacturer inventory integration, you can view additional data on the **Manufacturer Data** tab. You cannot enter information on this tab.



20. 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.



21. The **Accounting** tab displays the vehicle's accounting schedule detail, as shown in the Accounting Vehicle Internals screen.



Tip: Users must have access to the **Show Invoice**, **Show Dealer Pack**, and **Show Holdback** security items in the Permission Management section of Roles & Permissions in Setup to view this tab.

22. Use the **Photos** tab to view, add, and delete images for the inventory vehicle. (See *Adding Photos to an Inventory Record* for full details.)

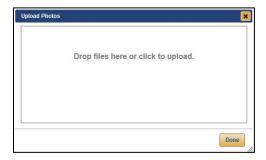
Adding Photos to an Inventory Record

Adding photos to an inventory record for a vehicle can be useful when browsing through inventory with customers. Photos of the interior and exterior of the vehicle will provide customers with a better idea of the vehicle's equipment and options.

- 1. Click **Inventory** in the blue toolbar at the top of the screen.
- 2. Search for the inventory vehicle for which you would like to add photos.
- 3. Click on the vehicle to open the inventory tabs.
- 4. Click on the Photos tab.



5. To add a photo, click the green + button next to **Add Photos**. The Upload Photos window opens.



6. You can add one image at a time or a batch of photos. To add images to the box, either drag and drop image files (JPGs and PNGs) from your desktop into the window, or click on the text in the Upload Photos window to access your computer's files.

When you choose to upload using the latter method, a file upload window will open, providing you with access to your computer's various libraries and file systems. Navigate to the appropriate drive and folder and click on the image you wish to upload. If you would like to upload multiple images this way, hold down the **CTRL** key on your keyboard while clicking the various images you would like to upload. When you've selected all the images you'd like to load for the vehicle, click **Open**.

7. The image or images will appear in the Upload Photos window. Click **Done**.

- 8. If you've uploaded multiple images for a vehicle, click on the image you would like to make the primary photo and click to check the **Primary Photo** box. If you upload only a single image for the vehicle, the **Primary Photo** box will automatically be checked. For batch uploads, this box is automatically checked for the first photo in the batch.
- 9. To remove a photo from the Photos tab, click the red **X** button next to Remove Photo. The photo is removed from the tab.

Creating a Desk for a Vehicle

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

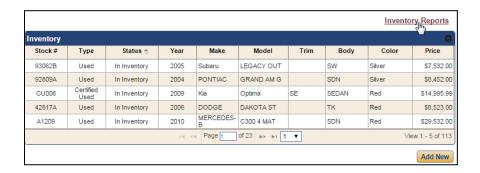
1. Click New Deal.



- 2. Type a name in the **Desk Name** field and click **Add**.
- 3. A new desk opens with the vehicle already added.

Generating Inventory Reports

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



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 wish 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 area 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 five types of deals: balloon, cash, lease, retail, 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 enter 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. If you've clicked the Use Enhanced Workflow checkbox in Setup, you'll walk through the deal process, stage by stage. However, if you've left the Use Enhanced Workflow box unchecked, you'll have access to every step of the desking process at once.

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.



Iowa State Tax Tables

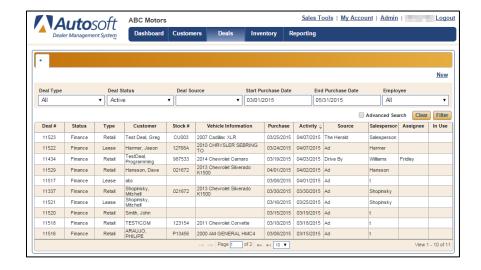
Dealer Management System
The information presented in this chapter is not intended to recommend a workflow. Any process represented is offered as a way to present the necessary information needed to understand how to use the program. While certain pieces of information are only available to certain users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

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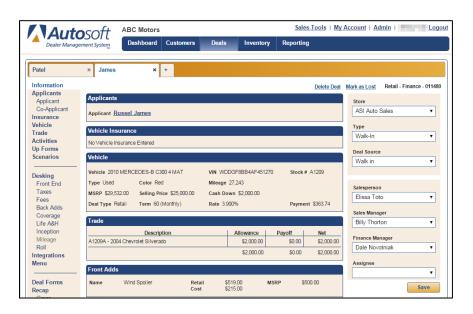
As you work through the screens, you should always click **Save** to save any information you have added to the deal. Safety measures have been added to the program to warn you when you attempt to navigate away from a screen without saving information. It is important that you read all prompts that appear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

Using the Deals List

When you click **Deals** in the blue toolbar at the top of the screen, 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.



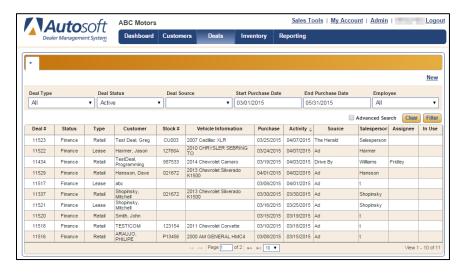
Once you start working with deals, you will not see this list when you click **Deals**. Instead, you will see the deals you have opened for viewing. The tab will display the applicant's last name or the name you assigned to the deal when you started it. The last tab will always be the + tab. You can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



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.

Creating a New Deal for a New Up

- 1. Click **Deals** in the blue toolbar at the top of the screen.
- 2. Click New.



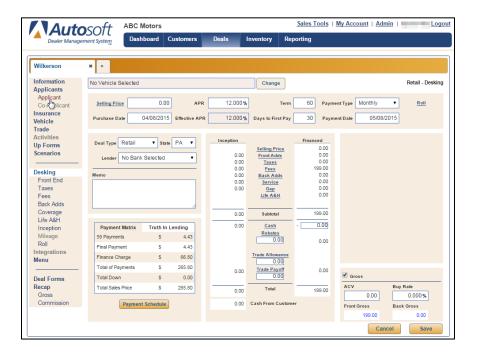
3. Type a name for the desking opportunity and click Add.



Tip: If the Suppress Deal Name Prompt function has been enabled by an administrator in Finance Setup, you will not need to enter a deal name at this point. Instead, when you click New, a new tab will automatically open with the generic name, "New Quote." Once you assign an applicant to the deal, the deal name on the tab will automatically be changed to the applicant's last name. When you use this function, the program will automatically advance you to the Desking screen. When ready to add an applicant, you can click Applicant and take the following steps.

4. A blank deal opens.

5. Click Applicant.



- 6. Search for an individual or organization. Remember, you are required to search for an applicant before you can create a new record to ensure the applicant doesn't already exist in the program.
- 7. If the applicant is not already in the system, click **Add New**. If the applicant is in the system, see the following section, "Creating a New Deal for an Existing Customer."
- 8. Add the applicant's basic information as described in Chapter 2.
- 9. Click **Save** to save the customer's information.
- 10. The program prompts you to select the up type, referral source, and salesperson 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 **Deal Source** list to identify the source for this up. These are the sources you created in the system setup. Use the **Salesperson** list to select the salesperson for the up. The field will default to the logged in user.



11. Click Save.

- 12. You can add additional customer information (such as credit information and driver's license information) by clicking **Applicant** in the left navigation panel. Use the appropriate tabs to add the information as needed and click **Save**.
- 13. Click any of the links in the left navigation panel to continue building the deal.
- 14. 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 "Desking." 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 Setup.



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

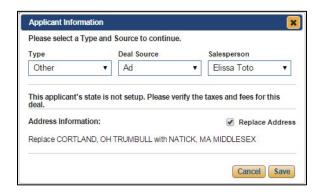
Creating a New Deal for an Existing Customer

- 1. Click **Deals** in the blue toolbar at the top of the screen.
- 2. Click New.
- 3. Type a name for the deal, and click Add.

Tip: If the Suppress Deal Name Prompt function has been enabled by an administrator in Finance Setup, you will not need to enter a deal name at this point. Instead, when you click New, a new tab will automatically open with the generic name, "New Quote." Once you assign an applicant to the deal, the deal name on the tab will automatically be changed to the applicant's last name. When you use this function, the program will automatically advance you to the Desking screen. When ready to add an applicant, you can click Applicant and take the following steps.

- 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. The Applicant Information window will open, and it may contain several different pieces of information depending on the applicant and information entered in FLEX DMS F&I. At the top of the window, 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 **Deal Source** list to identify the source for this up. These are the sources you created in the system setup. The **Salesperson** field will contain the name of the person logged in to the system, but you can use the drop-down menu to select a different dealership employee.

If the customer data contains a ZIP code that does not match the city and state you entered, the bottom of the Applicant Information window will display an Address Information message asking to replace the entered city and state with the city and state determined by the ZIP decoder. The box next to **Replace Address** will be checked by default. If you wish to retain the city and state originally entered for the customer, uncheck the **Replace Address** box.



If the tax rate associated with the ZIP code in the customer's record should be overridden based on state or local tax rates, the bottom half of the window will contain a Taxes Information section notifying you of the need to replace the existing tax rate for the customer's address with the applicable rate. The **Replace Tax Rates** box will be checked by default. If you do not wish to replace the rate, uncheck the **Replace Tax Rates** box. This will ensure the appropriate tax rate is applied to the deal based on the customer's address.



- 8. Click Save.
- 9. The program adds the customer to the deal.
- 10. 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 **Co-Applicant** from the left navigation panel.



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



Removing a Co-Applicant

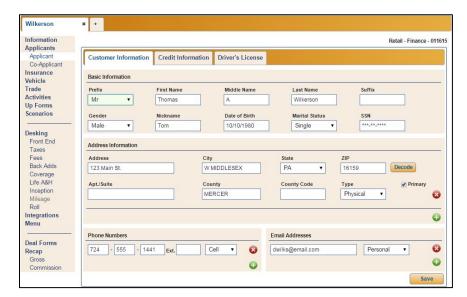
- 1. Click **Applicants** in the left navigation panel.
- 2. Click the red X button in the Co-Applicant box.
- 3. Click Continue when prompted to verify you want to remove the co-applicant.

Swapping the Applicant and Co-Applicant

- 1. Click **Applicants** in the left navigation panel.
- 2. Click Swap.
- 3. The applicant becomes the co-applicant and vice versa.

Editing Customer Information

You can edit the customer information for both the applicant and co-applicant by clicking on the respective option under **Applicants** in the left navigation panel, making any changes to the information, and clicking **Save**. Any changes you make are saved to the customer's record.



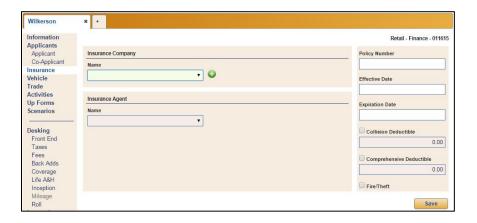
Changing a Customer

Once you add an applicant or co-applicant to a deal, to remove the customer, you must use the **Change** link to search for and select another existing customer or create a new customer to add to the deal.

Adding Vehicle Insurance

The **Insurance** option in the left navigation panel is where you add the customer's vehicle insurance carrier. You added the insurance companies and insurance agents in 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** from the left navigation panel.



- 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. 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 + button 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. Enter the policy number.

5. In the **Effective Date** and **Expiration Date** fields, type the date or use the calendar that appears when you click inside the fields to select the date.



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

Adding a Vehicle to the Deal

You can add a vehicle to the deal using the **Vehicle** option in the left navigation panel or directly from the **Vehicle** field in the **Desking** screen. Adding a vehicle using the **Vehicle** option allows you to search your inventory for all the vehicles that meet specific criteria. You can then view the vehicle information. When adding a vehicle on the **Desking** screen, you can scroll through a general inventory list and select 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 Option

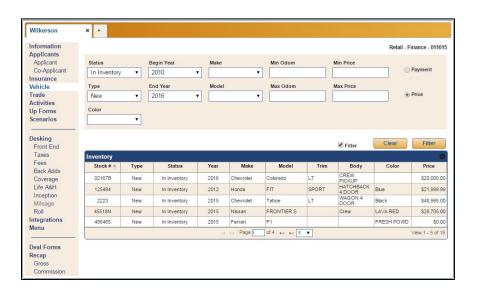
- 1. Click the **Vehicle** option in the left navigation panel.
- The search fields that display are based on the **Default Inventory View** setting on the Finance Defaults Setup screen in the Admin section.

If your system is set up to default to the **Search** setting, you can search the inventory based on the stock number, the last six characters of the VIN, invoice number, or order number. This is helpful if you are searching for a specific vehicle within the inventory.

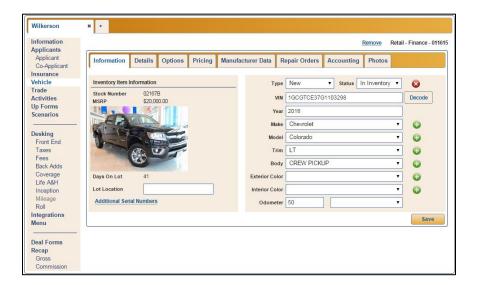
The **Filter** setting allows you to search the inventory for vehicles that meet more general criteria, such as inventory status, make, model, model year range, color, type, odometer range, and price or payment range. If your default is set to **Filter**, the associated fields will automatically appear when you click on the **Vehicle** option. However, you can switch to the Filter view from the Search format by checking the **Filter** box.

Enter or select the search or filter criteria you wish to apply, and click **Search** or **Filter**, respectively.

3. The bottom of the screen lists the vehicles in inventory that meet the specified criteria.



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

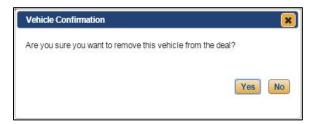


Removing a Vehicle from a Deal

- 1. Click the **Vehicle** option from the left navigation panel.
- 2. The vehicle information displays.
- 3. Click Remove.



4. When prompted to verify you want to remove the vehicle from the deal, click Yes.

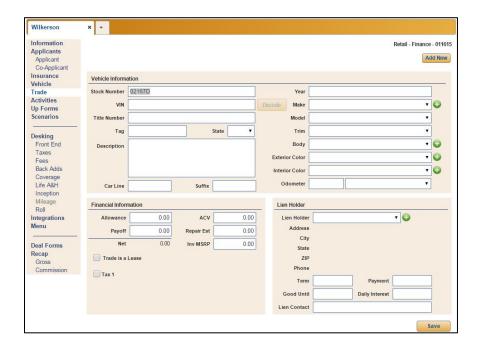


5. The program displays the search fields so you can search for another vehicle.

Adding a Trade to the Deal

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

- 1. Click **Trade** from the left navigation panel.
- 2. Click Add New.



- 3. In the **Vehicle Information** section, 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 vehicles, the **Stock** field fills in with an assigned stock number. The stock numbering used will depend on the trade stock numbering option you selected in **Finance Info** in the Admin Setup.
 - If you selected **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 **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. Enter the VIN of the trade vehicle.

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.

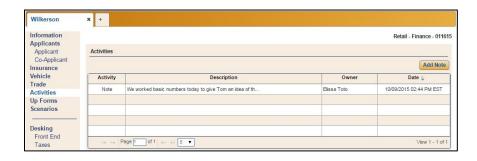
- 6. Enter the model year of the trade in the **Year** field.
- 7. Use the Make, Model, Trim, Exterior Color, and Interior Color menus to add details about the trade vehicle. If the respective menus do not contain the trade's make, model, trim, or exterior and interior colors, click the corresponding green + button to add a new item to the menu from this screen. Enter the item and click Add to complete the addition. Select the newly added item from the list.
- 8. Under Financial Information, enter the pricing details for the trade. The figures entered in the Allowance and Payoff fields will display on the Desking screen. If the trade is a lease, check the Trade is a Lease box, and if a tax rate should be applied, check the appropriate box.
- 9. The Lien Holder section allows you to add information for the lien holder. Use the Lien Holder menu to select the bank holding the lien. 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 + button to add a lien holder to the list directly 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. Complete the Term, Payment, Good Until, Daily Interest, and Lien Contact fields.
- 10. Click Save.
- 11. Repeat steps 2 through 10 for each trade on the deal.

Removing a Trade

- 1. Click **Trade** from the left navigation panel.
- 2. Click the red **X** button next to the trade.
- 3. Click **Continue** when prompted to verify you wish to remove the trade.

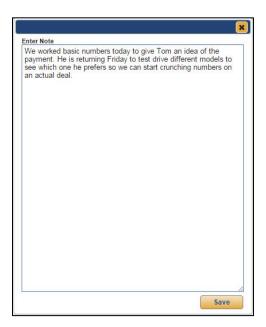
Viewing Activities

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.



Adding Notes

- 1. Click **Activities** from the left navigation panel.
- 2. Click Add Note.
- 3. Type the note.

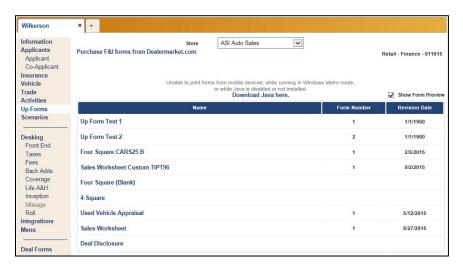


- 4. Verify the information is correct. You cannot edit a note once you add it.
- 5. Click Save.
- 6. The note appears in the Activities list.

Printing Up Forms

The Up Forms option displays 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 to the customer.

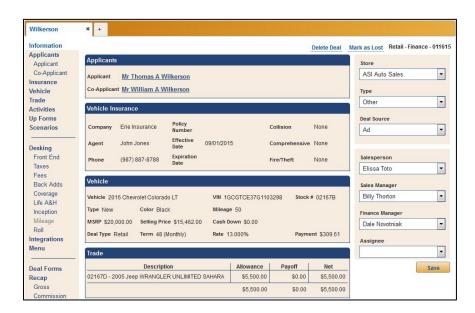
- 1. Click the **Up Forms** option in the left navigation panel.
- 2. The screen displays the list of available forms.



- 3. From the **Name** column, click the form you wish to generate. (You can also click the PDF icon on the right to view the form in a PDF viewer.)
- 4. The form displays on the screen.
- 5. Use the toolbar to view and print the form as needed.

Viewing Deal Information

The **Information** option in the left navigation panel provides an overview of the deal. You can also use the right column of the Information screen to choose a store (if your dealership has multiple locations), and change the up type and deal source. You will also use this screen to assign a sales manager, finance manager, and assignee to the deal. Select the individual from the list.



Desking the Deal

The **Desking** screen is where you work the numbers for the deal. Only users with Dealer Principal, Finance Administrator, and Finance Restricted permissions have unlimited access to the options in this section. Sales Administrators have access to options related to the sale (Desking, Front Adds, Taxes, Fees, Mileage, and Integrations) but do not have access to anything pertaining to finance (Backs Adds and Coverage).

You have the option of working completely on this screen or using the options in the left navigation panel to navigate through the different aspects of the deal. Click the options under the **Desking** heading to add front-end adds, taxes, fees, inception, and mileage (for leases) information. The links available next to each item on the **Desking** screen will also navigate you to the appropriate screen where you can add or edit information. For example, you can click **Taxes** under **Desking** in the left navigation panel or click the **Taxes** link on the screen to access the **Taxes** screen.

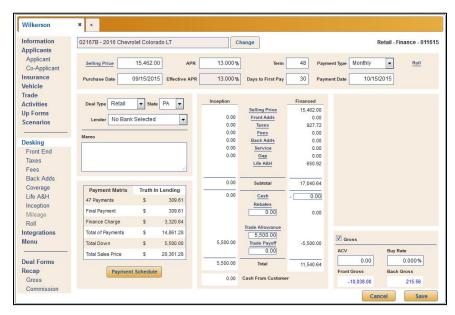




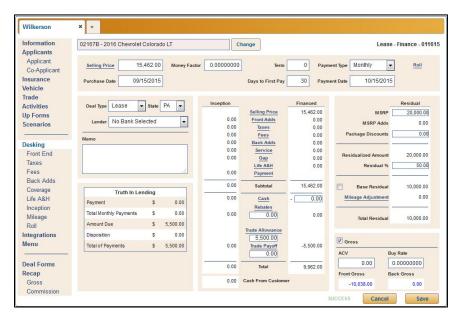
Each option will be covered in detail. The basic workflow for the deal is outlined in the following pages. This is a generic workflow, as each salesperson and finance representative will have his or her own method for working a deal. This workflow assumes that all applicant, insurance, and trade information was added when the deal was created.

Understanding the Basic Process

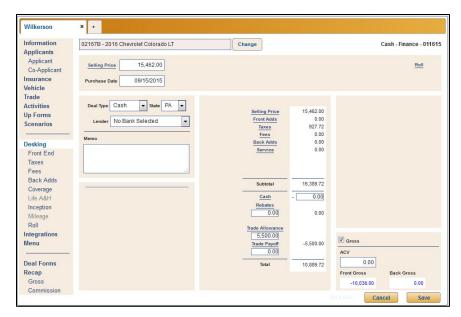
- 1. Click the **Desking** option in the left navigation panel.
- 2. The **Deal Type** defaults to the type selected in the setup. Use the list to select a different deal type as needed. The deal type determines the fields that display, so it is important to ensure you select the correct deal type.



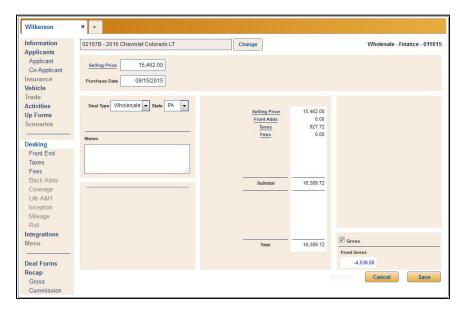
Retail Desking



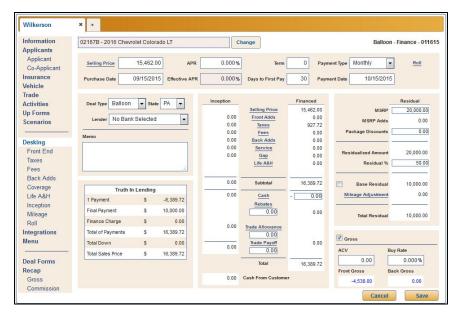
Lease Desking



Cash Desking



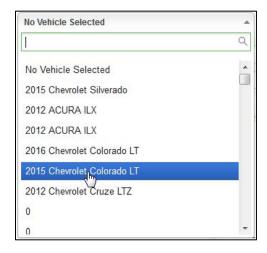
Wholesale Desking



Balloon Desking

Tip: If you attempt to change the **Deal Type** to Wholesale or Cash, the Deal Type Change Confirmation window will open, alerting you that information entered in various areas of the deal will be erased from the deal if the type is changed. To proceed, click **Continue**.

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

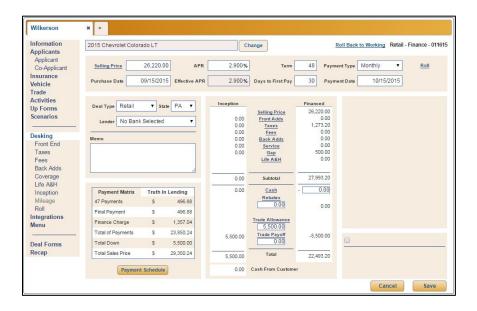


5. Enter the information required for each field.

- 6. Enter additional deal information using the options under the **Desking** heading in the left navigation panel or by using the links embedded in the Desking screen.
- 7. If you are using the enhanced workflow (set in Admin Setup by checking the Use Enhanced Workflow box), once all of the vehicle sale information is complete and the deal is ready to go to the Finance Department, click Ready for Finance. However, if you are not using the enhanced workflow, you will be able to access all areas of the desking screen for which you have the necessary permissions at any time during desking.



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



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.

- Once all the information has been added to the deal, use the **Deal Forms** screen to print the necessary forms.
- 10. Use the **Recap** option in the left navigation panel to view the gross for the deal.

11. Click the **Mark Sold** link next to the deal status information in the top right corner to flag the deal as complete and the vehicle as sold.

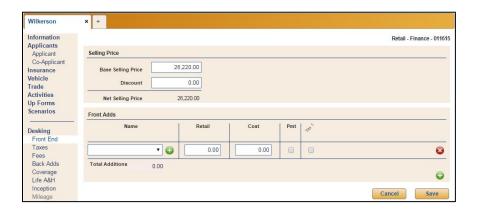


12. When the deal is ready to be sent to Accounting, click **Deal Finished** on the Recap screen. This flags the deal as finished.



Front End

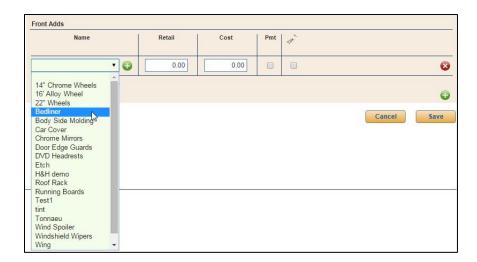
Use this option to change or apply discounts to the selling price and to add front adds to the deal. You can access this screen by clicking the **Front End** option under **Desking** or by clicking the **Selling Price** or **Front Adds** links on the **Desking** screen. Be sure you click **Save** to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



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



To add front adds, in the **Front Adds** section of the screen, click the down arrow to reveal the drop-down menu in the **Name** column. The list displays all front adds that were added to the system in Setup. Select the appropriate front add from the menu. The information that displays pulls from the information added in the setup for this item. Edit any field as needed.



If the menu does not contain the item you wish to add, click the green + button next to the drop-down menu and type the item you wish to add in the blank **Name** field. Type the name of the front add in the blank field, and add the **Retail** and **Cost** pricing information. Any front add items you add to this screen in this way will be saved only for this deal and are not added to the Front Adds setup.

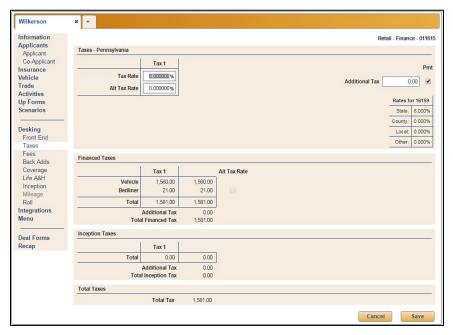
As you enter the information for a front add, another front add line will automatically appear for use if needed. Add additional front adds using the same process. To remove a front add, click the red ${\bf X}$ button next to the item.

When you have finished adding or removing front adds, click **Save** to save the changes. The total for the front add items you added will display next to **Front Adds** on the **Desking** screen.

Inception		Financed
	Selling Price	26,000.00
0.00	Front Adds	350.00
0.00	Taxes	1,581.00
0.00	Fees	0.00
0.00	Back Adds	0.00
0.00	Service	0.00
0.00	Gap	0.00
	Life A&H	0.00
0.00	Subtotal	27,931.00
0.00	Cash	- 0.00
	Rebates 0.00	0.00
0.00	Trade Allowance 0.00 Trade Payoff 0.00	0.00
0.00	Total	27,931.00
0.00	Cash From Custome	er

Taxes

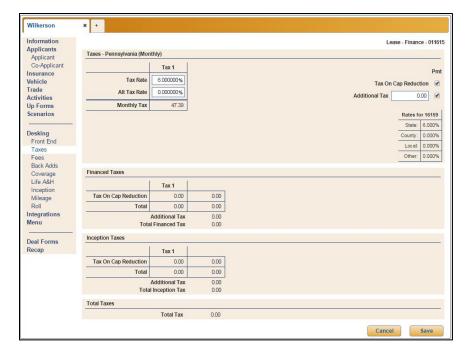
You can access this screen by clicking the **Taxes** option under the **Desking** header in the left navigation panel or by clicking the **Taxes** link on the **Desking** screen. The taxes applied to the deal are based on the state you select on the **Desking** screen. The tax added to the deal is based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



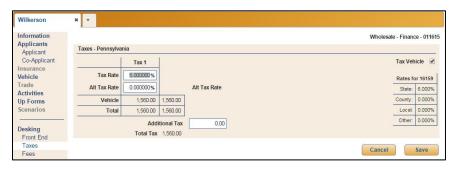
Retail Tax Screen



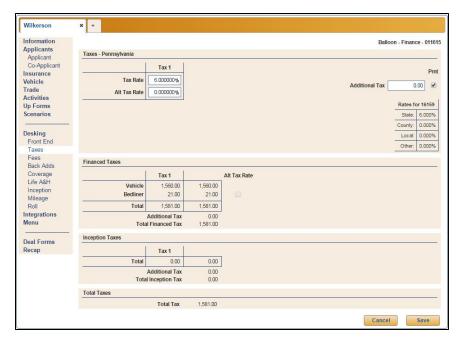
Cash Tax Screen



Lease Tax Screen



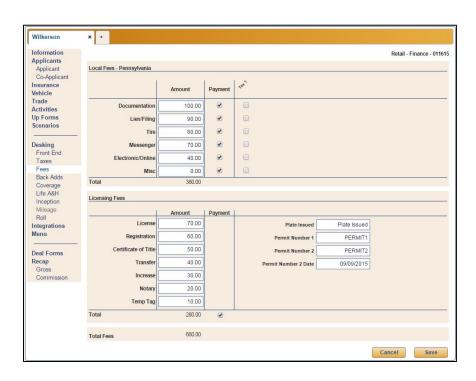
Wholesale Tax Screen



Balloon Tax Screen

Fees

You can access this screen by clicking the **Fees** option under the **Desking** heading in the left navigation panel or by clicking the **Fees** link within 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, be sure to click **Save** to save the changes. The total fees applied to the deal display next to **Fees** on the **Desking** screen.



Back Adds

The Back Adds screen is where you add back adds to the deal. If you are using the enhanced workflow, the **Back Adds** option is only available in the left navigation panel when a deal has been sent to Finance. Otherwise, it is always available to users with the necessary roles and permissions. You can access this screen by clicking the **Back Adds** option under the **Desking** heading in the left navigation panel or by clicking the **Back Adds** link within the **Desking** screen.

To add a back add to the deal, click the drop-down menu in the **Type** field and select the category of the back add item you wish to add from the list. This determines which items display in the **Name** column menu, which only displays the items that were assigned to the selected Back Add Type in the Back Adds setup. Select the desired back add item from the **Name** menu. The retail amount, cost, and taxing populate using the information added for this item in the setup.

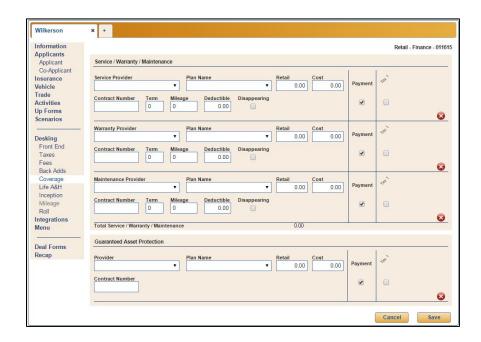
As you enter a back add, a new back add line will automatically appear on the screen to allow you to continue to add back adds without having to click the green + button.

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



Coverage

The Coverage screen 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. If you are using the enhanced workflow, the **Coverage** option is only available when a deal has been sent to Finance. Otherwise, it is always available to users with the necessary roles and permissions. You can access this screen by clicking the **Coverage** option under the **Desking** heading in the left navigation panel or by clicking the **Service** and **GAP** links within the **Desking** screen.



The screen is divided into two sections: Service/Warranty/Maintenance and Guaranteed Asset Protection. The Service/Warranty/Maintenance section is broken down further into separate areas for each of the three coverage options.

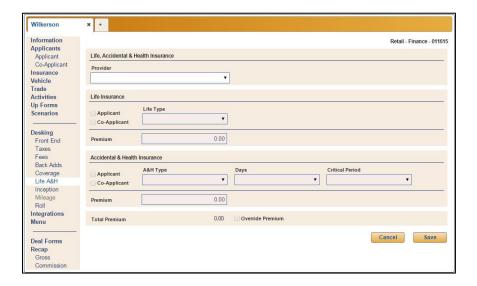
For the Service/Warranty/Maintenance section, use the respective **Provider** drop-down menus to select the coverage provider for each type of coverage. The list displays all the coverage providers that were added to the setup. Next, use the **Plan Name** menu to select the coverage plan. Again, these are all the coverage plans added for the selected provider during setup for the selected provider. The information that displays populates from the information added in the setup for the selected plan.

You can edit any field as needed. Click the red **X** button 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

The Life A&H screen is where you add any life or accident and health insurance the customer will be purchasing. If you are using the enhanced workflow, the **Life A&H** option is only available when a deal has been sent to Finance. Otherwise, it is always available to users with the necessary roles and permissions. You can access this screen by clicking the **Life A&H** option under the **Desking** header in the left navigation panel or by clicking the **Life A&H** link within the **Desking** screen.

When you select a provider from the **Provider** drop-down menu, the screen populates with the defaults set for the selected provider in the setup. You can edit the information as needed. Be sure to check the appropriate box for each type of coverage on the screen to note whether the coverage is for the **Applicant**, **Co-Applicant**, or both.



Tip: If Autosoft does not currently support calculations for a certain combination, a message reading, "Provider's calculation is currently unavailable," at the top of the screen. In this event, you must contact Autosoft support for further assistance.

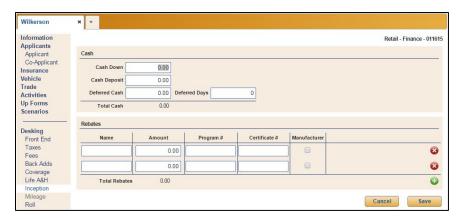
Inception

Use the Inception screen to add the cash and rebates that will be applied to the deal. To access the Inception screen, click the **Inception** option under the **Desking** heading in the left navigation panel or the **Cash** or **Rebates** links within the Desking screen.

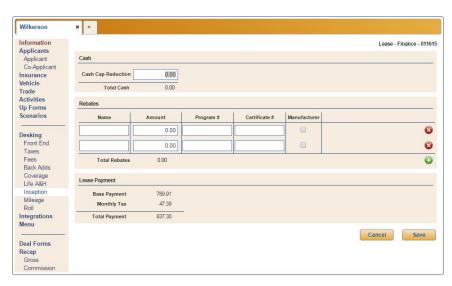
Use the **Cash** section to add **Cash Down**, **Cash Deposit**, and **Deferred Cash** amounts. The total for any applied cash will display next to **Cash** on the **Desking** screen.

To add rebates to the Rebates area of the Inception screen, type the name of the rebate in the **Name** field. Enter the rest of the rebate information, including **Amount**, **Program #**, and **Certificate #**. Check the **Manufacturer** box if the rebate is provided by the manufacturer.

Add an additional rebate in the rebate line that appears automatically when you enter the name of the rebate in the existing line. Click the red **x** button next to a rebate to remove it. The total for the rebates will display next to **Rebates** on the **Desking** screen.



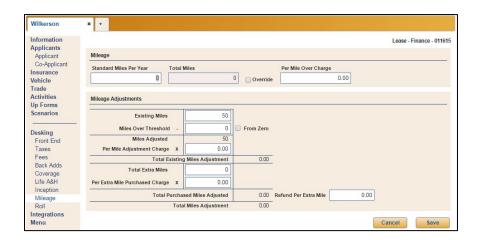
Balloon, Cash, and Retail Inception



Lease Inception

Mileage

For lease deals only, you will add the mileage details that will affect the lease residual using the **Mileage** option under the **Desking** heading in the left navigation panel or by clicking **Mileage Adjustment** within the far right panel of the Desking screen. The information you add on the Mileage screen displays next to **Mileage Adjustment** on the Desking screen. The **Mileage** option will only be available in lease deals and will be grayed out for all other deal types.



Rolling

Rolling allows you to hit target amounts as you work. All negotiable products added to a deal are available as rollable items within the Roll screen. The price of any front add, back add, or coverage that is not directly associated to a rate table can be used to roll the deal to a desired payment, amount financed, inception, or total gross. 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, balloon, lease, and cash deals, and the items you can roll vary by deal type.

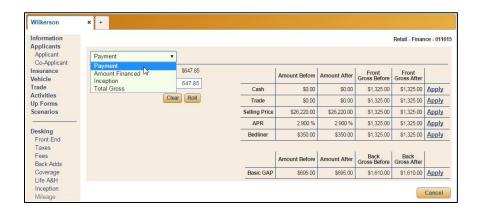
Note: Credit Insurance and some GAP Insurance products are directly associated to rate tables and will not be available to roll.

Rolling a Balloon or Retail Deal

1. Click the **Roll** option under the **Desking** heading in the left navigation panel or click the **Roll** link in the top panel of the Desking screen.

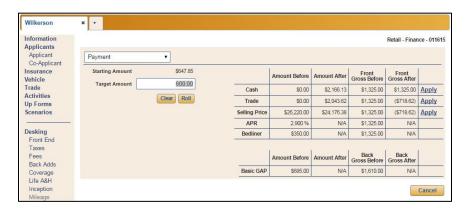


 For retail deals, you can roll to affect Payment, Amount Financed, Inception, or Total Gross. Select the option from the drop-down menu. The Starting Amount auto-populates with the amount currently in the deal for the category you selected.



- 3. In **Target Amount**, type the target value.
- 4. Click Roll.

5. The roll will adjust the cash, trade, selling price, APR and any rollable front adds, back adds, or coverage items that are not directly associated to a rate table to hit the target amount.



- 6. The table on 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.
- 7. Click **Apply** next to the roll you want to accept.
- The program prompts you that the action will save the data and change the numbers of the deal. Click Yes to continue.
- 9. The roll will be reflected in the deal.

Rolling a Lease Deal

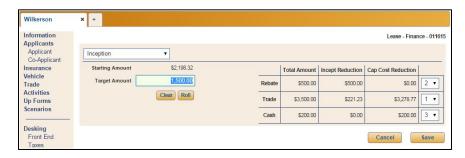
- 1. Click the **Roll** option under the **Desking** heading in the left navigation panel or click the **Roll** link in the top panel of the Desking screen.
- 2. For lease deals, you can only roll to affect the **Inception** or **Total Gross**. Use the drop-down menu to select the item you wish to adjust with the roll. The **Starting Amount** auto-populates with the amount currently in the deal for the category you select.
- 3. In Target Amount, type the target value.
- 4. To hit the target amount for inception, the roll will adjust the rebate, trade, and cash. Use the drop-down menus in the far right column of the table 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.



To adjust for a desired total gross amount, the roll will adjust trade, selling price, and any rollable front add, back add, or coverage that is not directly associated to a rate table.



- 5. Click Roll.
- 6. When rolling for a target inception amount, the Inception Reduction column will reveal the amount by which the total inception amount for the item was reduced. The Cap Cost Reduction column will display the changes to the rebate, trade, and cash amounts. If you wish to apply the roll, click Save. To discard the roll, click Cancel.



When rolling for a targeted total gross, the table 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 and after the roll. Click **Apply** to apply a particular rolled item to the deal. You will be prompted to verify that you wish to save the data and change the deal numbers. Click **Yes**.



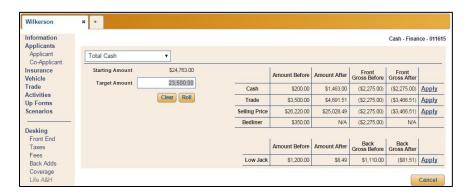
- 7. Click Save.
- 8. The deal will reflect the roll.

Rolling a Cash Deal

- Click the Roll option under Desking in the left navigation panel or click the Roll link in the top panel of the Desking screen.
- 2. For cash deals, you can only roll to affect **Total Cash** and **Total Gross**. Use the drop-down menu to select the item you wish to adjust with the roll. The **Starting Amount** auto-populates with the amount currently in the deal for the category you select.



- 2. In Target Amount, type the target value.
- Click Roll.
- 4. To hit the target amount, the roll will adjust the cash, trade, selling price, and any rollable front add, back add, or coverage that is not directly associated to a rate table.
- The table on 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 **Apply** next to the roll you want to accept.
- 7. The program prompts you that the action will save the data and change the numbers of the deal. Click **Yes** to continue.
- 8. 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 the **Deal Forms** option in the left navigation panel.
- 2. Locate the form you wish to print, and in the left column labeled **Copies**, use the up and down arrows to specify how many times you would like the system to prompt you to print that form.
- 3. Click the form you want to print.
- 4. The form displays on the screen.
- 5. Use the toolbar to view and print the form as needed.

Viewing the Recap

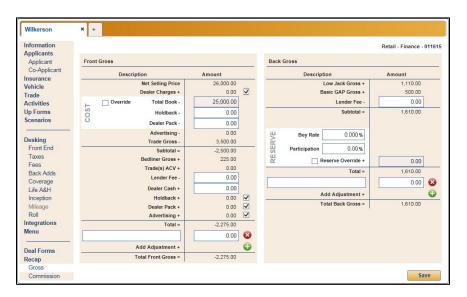
The **Recap** screen displays the breakdown of the gross and commission for the deal. This information is for viewing only. To edit information, return to the appropriate part of the deal, and edit the information.



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

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 + buttons in the Front Gross and Back Gross panels. Simply type a description and cost for the add. You can also choose to include or exclude items from the gross. Items with checked boxes will be included while blank boxes are excluded. Click to check a blank box. Click to clear a selected box.



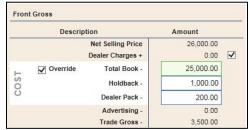
Tip: Only users with Dealer Principal, Finance Administrator, and Finance Restricted access rights can view and edit this screen. Also, the Dealer Pack, Holdback, and Invoice amounts are only visible to users with permissions to view this information.

Editing the Total Book

When checked, a check box labeled **Override** in the **Front Gross** panel on the Gross screen allows users with the correct permissions to edit the **Total Book** value. This feature provides authorized users with the ability to calculate deal profit and commission based on a manual vehicle cost entry, thereby lending flexibility to structure a deal even if the vehicle is not yet in inventory or an error was made in accounting during the vehicle purchase process.

When **Override** is unchecked, the **Total Book** value reverts to the system-calculated value, overwriting any manual entry. A user can quickly identify whether the **Total Book** field is manually entered or system-calculated by verifying if the **Override** check box is checked.





Tip: Only users with Dealer Principal, Finance Administrator, and Finance Restricted access rights can edit this Total Book value.

Viewing Commission

You can view and edit commission prior to finalizing the deal. Once the deal is finalized, you will not be able to access the **Commission** option in the left navigation panel. The **Commission** screen displays a list of individuals who are receiving commission on the deal and the commission totals. Click on 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 entered in the employee's setup record, or the general commissioning setup. You can edit the percentages or flat rates as needed.

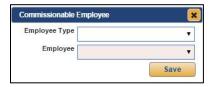


Tip: Only users with Dealer Principal, Finance Administrator, and Finance Restricted access rights can view and edit this screen.

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** from the left navigation panel.
- 2. Click Add New. A Commissionable Employee popup will open.



- 3. Use the **Employee Type** list to select the job title from a list of commissionable roles.
- 4. Use the **Employee** list to select the employee from the category chosen in the previous step.
- 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

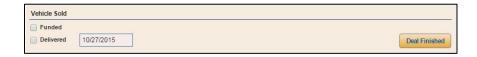
You can only remove an employee who was added for commissioning. You cannot remove the individual who originated the deal.

- 1. Click **Commission** from the left navigation panel.
- 2. Click the red **x** button next to the employee.
- 3. Click **Continue** when prompted to verify you want to remove the employee.

Finalizing the Deal

You also use the Recap 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. Once you finalize the deal, you will not be able to adjust the gross or commission details.

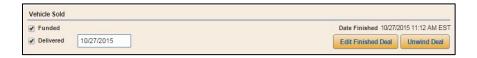
- 1. Click the **Mark Sold** link in the top right corner of the screen to flag the vehicle as sold. At this point, the deal status changes to "Sold."
- 2. A Vehicle Sold box displays at the bottom of the screen.



- 3. Click to select the **Funded** and **Delivered** boxes if they apply, and use the date field to enter the appropriate delivery date. If you select the **Delivered** box and click **Save**, the deal status in the upper right corner of the screen changes to "Delivered." If you do not click the **Delivered** box, the status will remain "Sold."
- 4. Click **Deal Finished** to complete the deal.
- 5. Click **Continue** when prompted to verify that you want to lock the deal for accounting. A deal will not be updated to your Accounting Department until you complete this step.
- 6. The date and time at which the deal was finished will appear above the **Edit Finished Deal** and **Unwind Deal** buttons that replace the **Deal Finished** button. The deal status will change to "Finished."
- 7. The **Print Deal Recap** and **Print Deal Commission** links at the top of the page will allow you to print a deal recap or commission totals.

Editing or Unwinding the Deal

Once you've finalized the deal, you can still edit or unwind it using the **Edit Finished Deal** and **Unwind Deal** buttons, which both become available after finishing the deal.

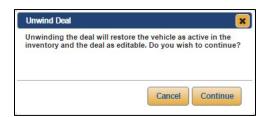


To edit the deal, click **Edit Finished Deal**. All the desking tools that were disabled after the deal was finished become accessible again. However, the deal vehicle's status will remain as 'Sold.' When you've made the necessary adjustments, return to **Recap** and click **Finish Editing Deal**. Finish by clicking **Save**.



Note: Once you've finished the deal, the deal is submitted to Accounting. Any changes you make while editing the finished deal will need to be communicated to Accounting to prevent accounting errors or imbalances. Click the **Resend to Accounting** button to ensure the Accounting Department is aware of the changes you've made to the deal.

To unwind the deal, click **Unwind Deal**. The system will prompt you that unwinding the deal will restore the deal vehicle to inventory as active and the deal as editable. To continue, click **Continue**. This will allow you to roll the deal back to Finance and edit the deal.



Marking a Lost Sale

If you wish to remove a saved deal from the deal list, you must mark the deal as a "lost deal." You will need to assign the deal one of the lost reason codes entered during the Admin setup.

After marking a deal as lost, you can delete the deal or reactivate it.

- 1. Open the deal.
- 2. Click the Mark as Lost link in the top right corner 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** from the blue toolbar at the top of the screen.
- Select Lost in the Status Type list.
- 3. Use the remaining fields to filter the list further as needed.
- 4. Click Filter.
- 5. The list displays the lost sales that meet your search criteria. Double-click the lost sale.
- 6. The deal opens to the Information screen.
- 7. Click the **Reactivate Deal** link in the top right corner of the screen.



8. 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. This 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 information will be lost if you attempt to close it at this point.

- 1. Click **Deals** from the blue toolbar at the top of the screen.
- Click New.
- 3. Type a name for the deal, and click **Add**.

Tip: If the Suppress Deal Name Prompt function has been enabled by an administrator in Finance Setup, you will not need to enter a deal name at this point. Instead, when you click New, a new tab will automatically open with the generic name, "New Quote." When you use this function, the program will automatically advance you to the Desking screen. When and if you are ready to add an applicant, you can click Applicant and follow steps 5 through 8 of "Creating a New Deal for a New Up" or "Creating a New Deal for an Existing Customer."

A blank desk opens.

- 5. Add a vehicle.
- 6. Select the **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 from the **Lender** drop-down menu and adjust the terms.





- 8. Add Front End, Taxes, Fees, Inception, and Mileage (for leases only) information as needed.
- As you add and save information, the **Desking** screen adjusts to reflect the information, and the Payment Matrix at the bottom left corner of the screen provides a breakdown of the deal numbers.



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 without assigning an applicant, you will lose the information.

Viewing Multiple Deals

You can have up to six deals open at a time. They display as tabs with the deal name assigned when the deal was created or "New Quote" if the **Suppress Deal Name Prompt** function has been enabled in setup and an applicant hasn't been added to 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.



Understanding Deal Status

The deal status is an important piece of information that identifies where the opportunity is in the sales 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. This status also occurs from the beginning of the desking process when the person desking the deal has finance permissions and the Use Enhanced Workflow box is unchecked in the system setup.
- Sold: The deal has been flagged as sold using the Mark 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.

When you choose to sort the deal 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:

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



Chapter 5

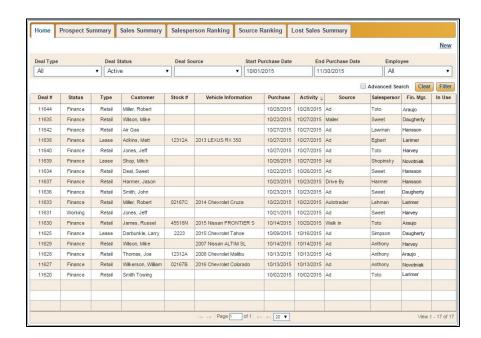


Chapter 5 The Dashboard

The Dashboard is the first thing you see when you log on to FLEX DMS F&I. 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. The graphs provide a quick visual analysis of the information, while the statistics provide actual figures. The top of several tabs provides fields you can use to filter the list as needed to access the information you want.

Home

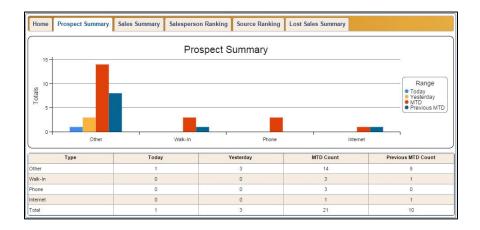
The **Home** tab is the default tab. It displays the current Deals list. Users with Sales Restricted access will only see their deals in this list. Users with Sales Administrator, Finance Restricted, Finance Administrator, and Dealer Principal access rights will see all deals in the list.



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

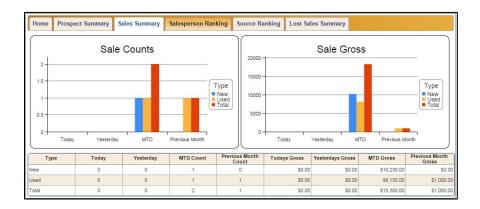
Prospect Summary

The **Prospect Summary** tab 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-to-date.



Sales Summary

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



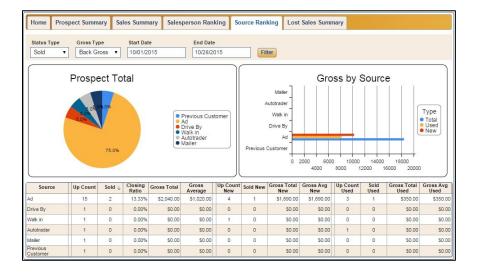
Salesperson Ranking

The **Salesperson Ranking** tab displays only statistical data. It provides the sales ranking for the salespeople. In addition to up counts, it displays the number of sales, closing ratio, total gross, and average gross for each salesperson. It also breaks the information down by vehicle type: new and used.



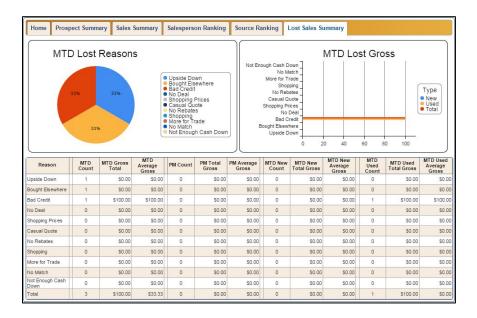
Source Ranking

The **Source Ranking** tab 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 Sales Summary** tab provides information about lost sales. The lost sales codes were established in the system 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 sales, allowing you to evaluate both the internal and external reasons that led to the lost sales. You can then use the information to make necessary adjustments to your sales or inventory practices.



Dashboard Reports

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



Reporting





Chapter 6 Reporting

The **Reporting** option allows you to generate reports for your dashboard activities, inventory, traffic, and sales. The preformatted 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 the **Reporting** option in the blue toolbar at the top of the screen.
- 2. Use the drop-down menu at the top of the screen to select the type of reports you would like to generate. You can choose from dashboard, inventory, traffic, and sales reporting. The system defaults to dashboard reports.
- 3. Once the list of reports opens for the category you've selected, click the name of the report you wish to generate, or click the report's corresponding PDF symbol.



- 4. The report opens in a new Web browser tab.
- 5. Use the report toolbar to view and print the report as needed.

Conclusion

That completes learning how to use FLEX DMS F&I. 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 in information for integrations.

Accessing My Account

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



2. The My Account section displays.

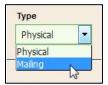


- 3. The section contains three pages.
 - **Information:** Use this page to manage your personal information.
 - **Account:** Use this page to manage your password.
 - **Integrations:** Use this page to view your integration sign-on information.

Managing Information

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** fields are required.
- 3. The **Address Information** section displays the addresses on file for you. Click the green + button to add an address. Type the address, and use the **Type** drop-down menu to select the address type. Each employee can have two addresses listed: a physical address and a mailing address. Click the red **x** button next to an address to delete it.



4. The **Phone Numbers** section contains the phone number/s on file for you. You can list up to three phone numbers: home, cell, and work. To add a phone number, click the green + button and enter the phone number. The **Type** defaults to Home. Select a different option from the drop-down menu as needed. To delete a phone number, click the red x button next to the phone number.



- 5. The **Email Addresses** section contains the email address/es on file for you. You can list two email addresses: personal and work. To add an e-mail address, click the green + button and enter the address. The **Type** defaults to Personal. Select a different option as needed. Click the red x button next to an e-mail address to delete it.
- 6. Click Save. A green "Success" message verifies the information has been saved.

Managing Account Information

The Account page displays important information about your login information for FLEX DMS F&I. You will also use this screen to change your password when necessary.

1. Click **Account** in the left navigation panel. The Account screen displays.



- 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 do so. You can change it whenever you like.

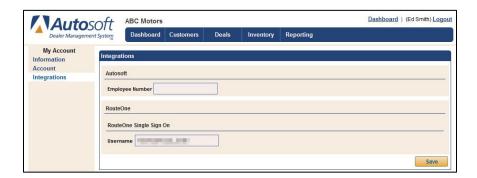
- 1. Click Change Password.
- 2. The Password Reset screen opens.



- 3. Your current password auto-populates the **Old Password** field.
- 4. 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.





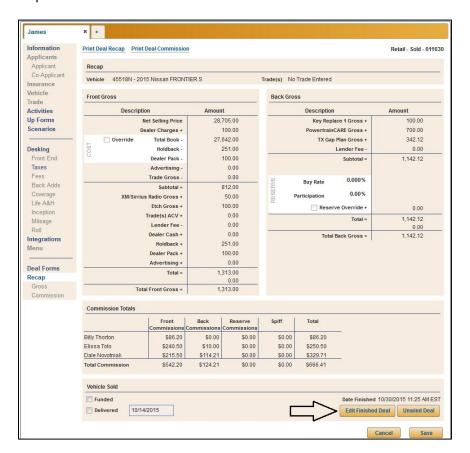
Editing Frozen Deals

Appendix B

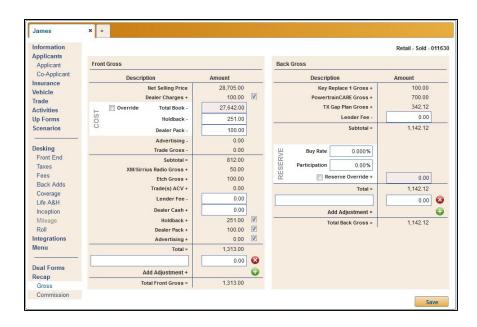
Appendix B Editing Frozen Deals

FLEX DMS F&I has a feature that allows you to edit deals that have been marked as 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.

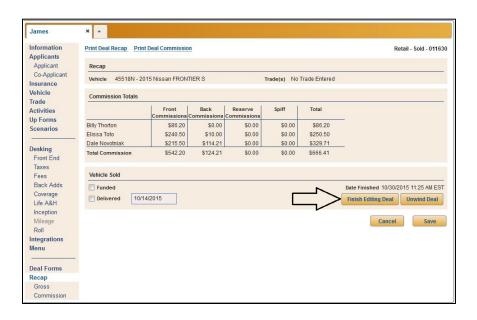
For a finished deal, the users with appropriate permissions will see an **Edit Finished Deal** button on the bottom of the Recap screen.



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.



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



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

Appendix C Deleting Deals

In some scenarios, 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. In this instance, you would not want to mark it as a lost deal because it would cause your lost sales statistics to be incorrect. In this case, 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** in the blue toolbar at the top of the screen.
- 2. Select the deal from the Deals list.
- 3. Click the **Information** option in the left navigation panel and click **Delete Deal**.



4. The system will ask you to verify you wish to delete the deal. Enter an explanation for the deletion in the **Reason for Deletion** textbox and click **Delete**.



5. You will be returned to the Deals list, from which the deal has been deleted.

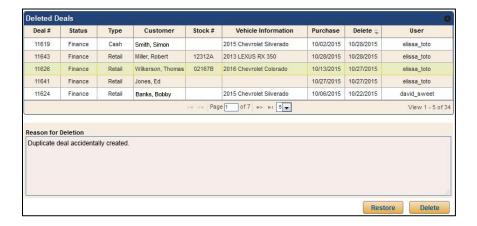
Reviewing Deleted Deals

The deleted deals are moved to a recycle bin in the Tools area of the Admin section. 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 in the blue toolbar at the top of the screen.



- 3. A list of deleted deals opens.
- 4. Click a deal in the list to view the reason that was added when deleting the deal.



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 in the blue toolbar at the top of the screen.
- 3. Click on the appropriate deal from the list of deleted deals.
- 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 in the blue toolbar at the top of the screen.
- 3. In the list of deleted deals, click on the deal you wish to permanently delete.
- 4. Click Delete.
- 5. Click **Delete** when prompted to verify you want to permanently delete the deal.



6. The deal is permanently deleted from the Deleted Deals list.

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.

- 1. Click the **Reporting** option in the blue toolbar at the top of the main FLEX DMS F&I screen.
- 2. Use the drop-down menu at the top of the screen to select Sales.
- From the list of sales reports, click on Deleted Deals or on the report's corresponding PDF symbol.
- 4. The report opens in a new Web browser tab.





Appendix D

Appendix D Driver's License Scanner

FLEX DMS F&I 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 Customer Support Center representative. When you receive your scanner from Autosoft, contact the Support Center. **Do not** install any software that may accompany the scanner. Autosoft will install the necessary software and drivers required for integration with the FLEX DMS F&I program.

Using the Scanner to Add a New Customer

- 1. Click **Customers** in the blue navigation bar at the top of the screen.
- 2. Search for the customer as required.
- 3. Click Add New w/ Scanner.
- 4. The Driver's License Information screen opens.
- 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.

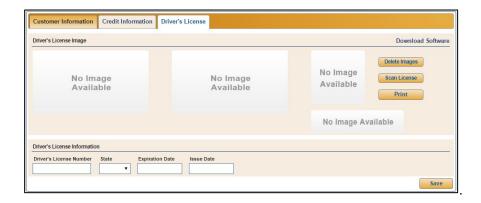
- 6. Click **Scan Front** or **Scan Back** based on the side you are scanning. When the scan is complete, the image will display in the corresponding window on the screen. If you do not like the way a side scanned, place the license back in the scanner, and click the corresponding **Scan** button to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

- 9. When you are finished scanning the license and editing the information, click Save.
- 10. The program creates a new customer record.
- 11. Add any additional information as needed.
- 12. Click Save.

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** from the blue navigation bar at the top of the screen.
- 2. Search for the customer.
- 3. Select the customer.
- 4. Click **Edit** in the bottom right corner of the Customer Information box on the Customer Summary page.
- 5. Click the **Driver's License** tab.



- 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 and 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 checked. 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 uncheck the box. Review and edit the information 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.



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.
- 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.
- 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 deal.
- 2. Click Applicant.
- 3. Search for the customer as required.
- Click Add New w/ Scanner.
- 5. The Driver's License Information screen opens.
- 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 and 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.







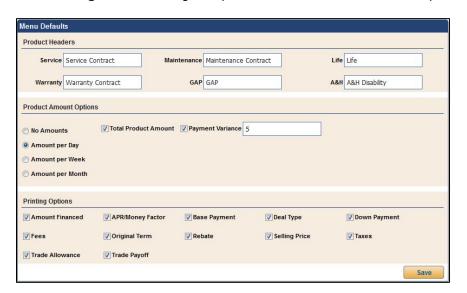
Appendix E Menu Selling

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, specify which back end products pull to the template. You must have the appropriate administrative role to set these defaults and create templates.

- 1. Click the **Admin** link at the top of the screen.
- 2. Click Menu Selling in the left navigation panel. The Menu Defaults screen opens.



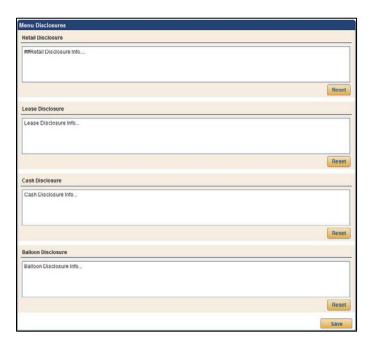
- 3. Under **Product Headers**, type the descriptions you wish to print for each item.
- In the Product Amount Options section, click to select the amount you wish to print per product on the form: No Amounts, Amount per Day, Amount per Week, or Amount per Month.
- 5. The **Total Product Amount** box allows you to allow 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 would like to use on the form in the field to the right.
- 7. Use the **Printing Options** section to select the items you wish to print on the form.
- 8. Click **Save** to save the information. A green "Success" message verifies 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** in the left navigation panel.
- 2. Type the disclosure you want to print for each deal type.



3. If you prefer to use the installed disclosures, click **Reset** to load the disclosure. The disclosure will populate the screen. Edit these preloaded disclosures as needed. You can click to reset the disclosure to the preloaded text at any time.



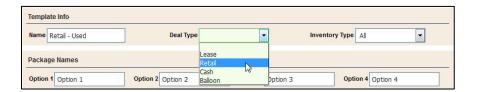
4. Click **Save** to save the information. A green "Success" message verifies the information has been saved.

Creating Templates

Use the **Templates** setup to create your menu templates. You can completely control the templates by assigning back end products to each template. You can add up to six options to a package. When working the deal, choose the template you'd like to use in the menu. You can then edit the menu to remove options as you work the deal.

Adding a New Template

- 1. Click **Templates** in the left navigation panel.
- 2. Click Add New.
- 3. Type a name for the template.
- 4. Use the **Deal Type** and **Inventory Type** drop-down menus to select the deal type and inventory type for which this template applies.



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



- 6. You can add up to six products using the Menu Products section. Click the green + button to add a new product.
- 7. In the Select Product window that opens, select the **Product Type**, **Provider/Name**, and **Plan/Name**.

8. Click **Save**. The product is added to the template.



- 9. To remove a product, click the red **X** button next to the product.
- 10. Use the checkboxes to select the products you want to make available for each level of the template. Checking a box will include the item. A blank box excludes the item.



11. 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.



12. When you are finished adding products, click **Save** to save the information. A green "Success" message verifies the information has been saved.

Removing Templates

- 1. Click **Templates** in the left navigation panel.
- 2. Locate the template you wish to delete and click the red **X** button in the **Delete** column for that template.

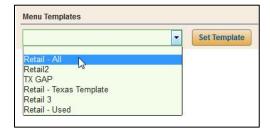
Using Menu Selling

You access menu selling from the **Deals** 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.
- Once the deal is flagged "Ready for Finance," the Menu option in the left navigation panel is available.
- 3. Click Menu.
- 4. Use the **Menu Templates** list to select the template you wish 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 populates the screen.

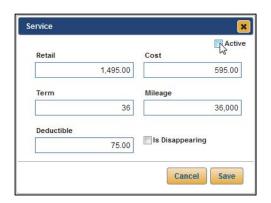
Tip: Once you begin editing package options for a template, you can select a menu template and click **Set Template** to reset the screen to the original template options.

6. 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.



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



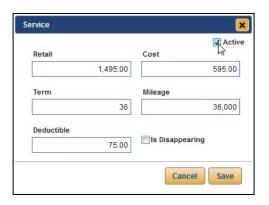


To remove an entire package, click to clear the check mark from the box in front of the package name. To add a package back to the menu, click to re-check the box in front of the package name.



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 item's details window opens. (The fields that display on the screen will vary based on the product you are editing.) Edit the prices as needed, and click **Save**.

To remove a product from the menu, click the red **x** button on the right side of the line. To add a product, click the green **+** button. Use the drop-down menus to select the product you want to add.

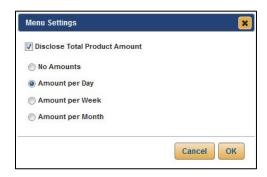
7. The **Payments** section identifies the payments for each package. The **Term** is based on the **Payment Variance** set under **Product Amount Options** in the Menu Selling setup. You can manually edit these values as needed.



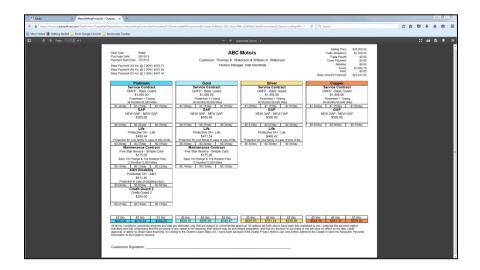
Tip: The Payments section for lease deals will include a Residual column for each line.

8. Click **Save** to save changes. A green "Success" message at the bottom of the screen verifies the information has been saved.

9. Click **Settings** to verify the pricing of the products selected will appear as you desire in the printed menu. Click **OK** to save any changes you make to the settings.



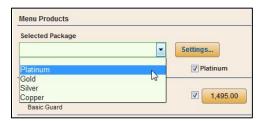
10. You can click the **Print Menu** link to print a copy of the packages. The menu opens in a new tab in the browser window. All selected options for each package print when you print the menu. The printout includes only the items specified to print on the printout in the Menu Selling setup. The bottom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



11. Once the customer reviews the menu, you can remove any declined options from a package by clicking to clear the check 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.



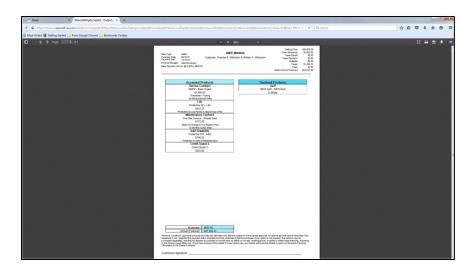
12. Once the customer decides on a package, select the package from the **Selected Package** list.



13. Click the Print Acceptance link.



14. 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.

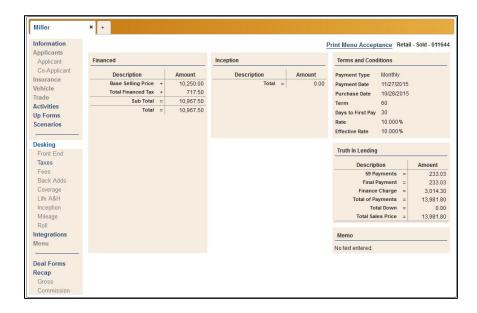


- 15. Click Apply on the Menu Selling screen to apply the menu option to the deal.
- 16. The system warns you that applying the menu will remove all Back Adds, Service, Warranty, Maintenance, GAP, and Life A&H from the deal. Click Continue to finish applying the menu options.



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.







Appendix F

Appendix F Deal Tools

Autosoft's Deal Tools can simplify finalizing a sale by providing easy-to-use tools that help you advise customers and establish the best deals possible. This suite of tools provides you with more control, which speeds the sales process and helps you tailor deals to your customers' needs and budgets. The Deals Tools suite includes Scenarios, Inventory Roll, Sales Tools, and Payment Schedule. Deal Tools has the power to inform customers of a vehicle's true value to their budget and the flexibility to help you build the perfect deal.

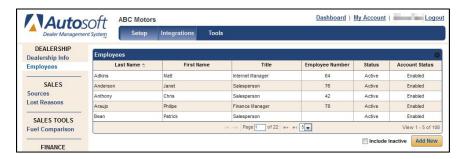
Scenarios

The Scenarios feature allows you to present a customer with several different deal options side by side. This provides you with the flexibility to make alterations to vehicle, deal type, financing, front and back adds, and additional coverage within different scenarios in order to structure the most appealing deal possible for the customer.

Enabling Scenarios

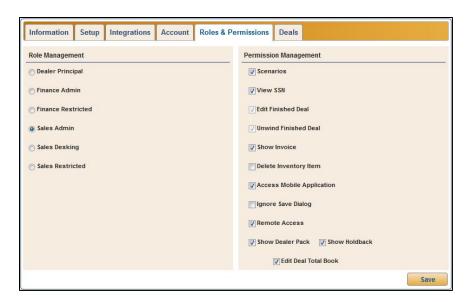
Scenarios functionality is permissions-based and must be enabled for each employee who will need to use it. Enabling Scenarios can only be done by a dealership user with administrative rights in FLEX DMS F&I.

- 1. Click the **Admin** link at the top of the screen.
- 2. From the left navigation panel, click on the **Employees** option, which will open a list of FLEX DMS F&I users within your dealership.



3. Once you've located the employee for whom you'd like to enable the Scenarios tool, click on his or her name to open the employee's user profile information.

- 4. Click the Roles & Permissions tab.
- 5. Check the box next to **Scenarios**.



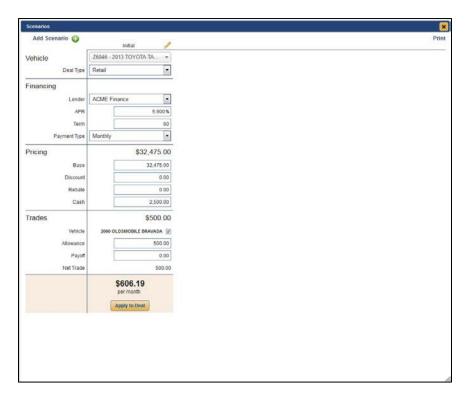
6. Click **Save** to apply the change.

Creating Scenarios

Once Scenarios has been enabled for a user, the tool is accessible through the **Deals** tab in the blue toolbar and can be used to fine-tune any deal. After you've established an initial deal based on your conversation with the customer, you can use Scenarios to alter the details of the deal to offer the customer options that may make finalizing the sale more likely.

- 1. While in the deal you are working, click the **Scenarios** option in the left navigation panel.
- 2. The Scenarios screen opens in a new window. The deal you've structured with your customer on the **Deals** tab appears as the initial scenario.

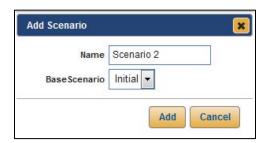
You can make adjustments within the initial scenario here without affecting the original deal. While the Scenarios window is open, you cannot make any changes within the original deal screen.



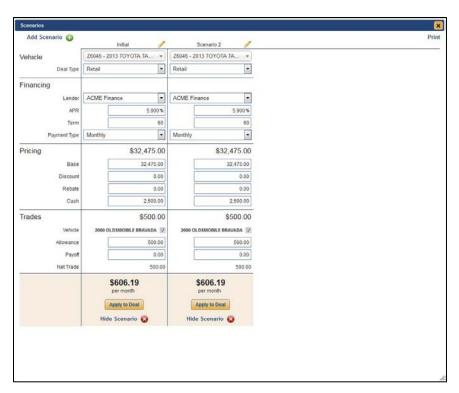
To add a new scenario, click Add Scenario or the green + button in the top left corner of the Scenarios screen.



4. The Add Scenario window opens. The **Name** field will auto-populate with a generic name for the scenario. However, you can edit this field if desired.



- 5. The Base Scenario field is used to determine on which existing scenario a new scenario will be based. In this case, Initial is the only choice; however, as you establish scenarios for a deal, the Base Scenario menu options will grow. Select the base scenario from which you'd like to create a new scenario.
- 6. Click **Add.** A scenario matching the initial scenario will appear to the right of the initial scenario. You can change a scenario's name at any time by clicking on the **pencil** icon to the right of the scenario name, entering a new name, and clicking **Rename**.



- 7. Adjust the information from the existing scenario within the new scenario.
 - Within the Vehicle section, you can use drop-down menus to select a different vehicle or to change the Deal Type (Balloon, Cash, Lease, or Retail).
 - In the **Financing** section, you can choose a different lender from the **Lender** menu and adjust the **Term** and **Payment Type**.

- The Residual area, which is only accessible in lease or balloon scenarios, allows for changes to MSRP and Residual Percentage.
- Within the **Pricing** portion of the scenario, you can alter **Base**, **Discount**, **Rebate**, and **Cash** applied to the deal.
- Front and back adds can be removed or added by clicking on the checkbox next to each item in the Front Adds and Back Adds sections.
- The Coverages area displays all insurance and extended warranty coverage added to the deal, which can each be removed from or restored to the scenario by unchecking the box next to an item.
- Life A&H, if added to the original deal, can be removed by checking the box in this section of the deal or re-added if removed in the scenario's base deal.
- You can remove trades or alter trade allowances within the **Trades** area of a scenario.

Tip: If the original deal and scenario did not contain front or back adds, or coverage and life A&H plans, the corresponding sections will not appear in the subsequent scenarios.

As you make changes and enter through the fields, the price per month displayed at the bottom of the scenario also changes. If you click once on the dollar amount at the bottom of the screen, the displayed dollar amount will switch from monthly payment to the payment total (for a lease) or total sales price (for a retail, cash, or balloon deal). To switch back to monthly payment view, simply click the dollar amount again.

- 8. Repeat steps 3 through 7 to add as many scenarios as you like, choosing the base scenario that is closest to the scenario you'd like create.
- 9. Only four scenarios may be viewed on screen at a time and printed side by side; however, to allow for more than four scenarios to be created for a deal and various combinations of scenarios to be compared side-by-side, you can hide scenarios by clicking on the **Hide**Scenario link at the bottom of a scenario.

Once a scenario is hidden, you can choose to redisplay it by selecting the name or number of the hidden scenario from the drop-down menu in the far left box at the bottom of the screen and clicking **Unhide**. You can only unhide a scenario if you have an empty space on the screen in which it can be displayed.





Reviewing and Applying Scenarios

Reviewing scenarios with a prospect is easy. You can either view the Scenarios screen with the prospect or print a hardcopy for review.

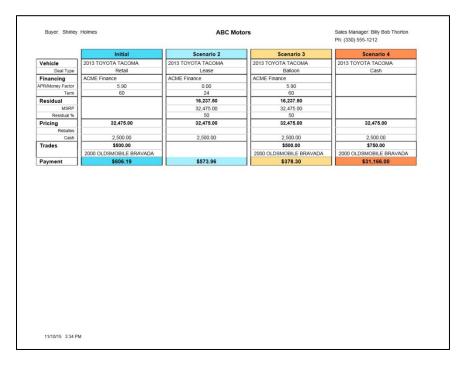
Printing Scenarios

You can print a printer-friendly, side-by-side hardcopy of the scenarios you've laid out to review with prospects.

1. Click the **Print** link in the top right corner of the Scenarios screen.



- 2. A printer-friendly version of the scenarios will open in a new Web browser tab.
- 3. To print, click the **printer** icon in the browser you're using, select the appropriate printer, and click **OK**.

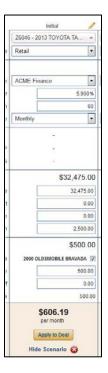


4. After printing, you can close the printer-friendly version by closing only the tab in which the document opened on your Web browser.

Applying a Scenario

Once the customer has decided on a scenario, you can easily apply the scenario to the deal.

1. Click the **Apply to Deal** button at the bottom of the scenario the customer has selected.



2. A pop-up box will verify that you wish to apply the scenario to the deal and remove any unchecked adds and coverages, as well as allowances and payoff values of any unchecked trades. Click **Apply**.

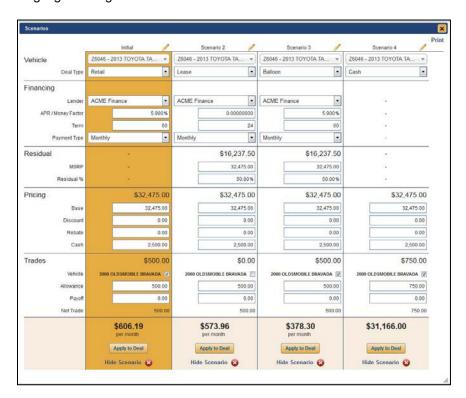


3. The selected scenario will be applied to the deal, and the deal screen will reflect the options and numbers established in the scenario.

Switching Scenarios on a Deal

If at any point before finalizing the deal the customer chooses a different scenario, you can easily apply one of the other scenarios you've established for the deal.

1. While working in the deal in the **Deals** tab, click the **Scenarios** option in the left navigation panel. The range of scenarios you've created for the deal will open, and the applied scenario will be highlighted in gold.

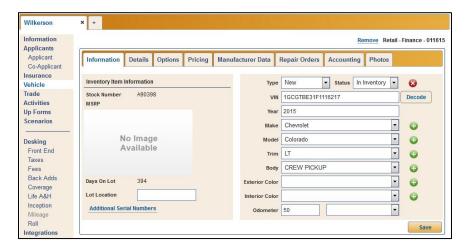


2. Repeat the steps outlined in the previous section, "Applying a Scenario," to apply a different scenario to the deal.

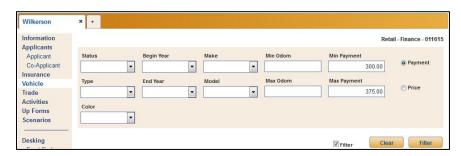
Inventory Roll

Inventory Roll is a useful tool if you've added a vehicle to a deal but find that the consumer isn't able to secure financing to cover the price of the vehicle. Using this tool, you can easily search your inventory for a vehicle that matches the appropriate specified payment range and sort results based on gross profit. This will allow you to arrive at a vehicle that meets the customer's needs while maximizing your profits.

- 1. In an established deal, click on the **Vehicle** option in the left navigation panel.
- 2. Click **Remove** to remove the current vehicle from the deal.



- 3. A confirmation window will ask you to confirm that you wish to remove the vehicle. Click Yes.
- 4. The Inventory list will open. To search based on vehicle price or payments, check the box next to **Filter** and choose to filter using either **Payment** or **Price**.



If searching based on vehicle price (the default search option), enter a minimum price in the Min Price field and a maximum price in the Max Price field.

If filtering inventory based on payment, enter a minimum payment in the **Min Payment** field and a maximum payment in the **Max Payment** field.

6. Click Filter.

7. The results meeting your search criteria will populate the Inventory list below. If the list is blank, the inventory does not contain any vehicles meeting your search criteria.

If you search based on price, the results will be arranged by default in ascending order of price in the **Price** column. To rearrange in descending order, click on **Price** in the column header.

When you search based on payment, the results can be sorted by either **Payment** or **Gross** by clicking on either column header. The vehicles, by default, will be arranged in ascending order. Clicking either the **Payment** or **Gross** header twice arranges the results by payment or gross in descending order, respectively.



- 8. Select and apply a vehicle to the deal by double-clicking on the vehicle from the results list.
- 9. The new vehicle's Information tab will open. Click **Save** to retain the vehicle information.

Sales Tools

The suite of Sales Tools provides you with easy access to features that may help to demonstrate to a customer that a vehicle is within his or her price range or allow a sales manager or finance manager to quickly estimate payments on a vehicle without navigating away from the deal on which he or she is currently working. The suite is comprised of Fuel Comparison, Refund Calculator, and Payment Estimator.

Sales Tools is available from the **Sales Tools** link at the top of every page.



Fuel Comparison

Fuel Comparison provides a quick estimate of a vehicle's fuel usage and a comparison against the customer's current vehicle's gas usage. This sales tool may help to encourage a sale by demonstrating a vehicle's long-term value and cost savings.

Setting Up Fuel Comparison

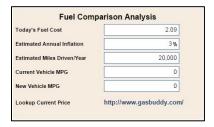
To make using Fuel Comparison easier, a user with administrative access to FLEX DMS F&I can set up the day's fuel price, a default estimate for annual inflation and a default for the estimated miles driven per year. These figures will auto-populate the Fuel Comparison tool when it's opened from the Sales Tools link. However, the default figures can be changed within the tool to achieve the most accurate snapshot of cost-savings possible for a customer.

- 1. Click on **Admin** at the top of the screen.
- 2. Under the Sales Tools heading in the left navigation panel, click on Fuel Comparison.
- 3. Enter the day's fuel cost in the field labeled **Today's Fuel Cost**.
- 4. In the **Estimated Annual Inflation** field, type the appropriate percentage for annual inflation.
- 5. You can also set a default mileage in the Estimated Miles Driven/Year field.
- 6. Click Save to save the settings.

Note: You may only need to update the default fuel cost on a weekly basis, rather than daily.

Using Fuel Comparison

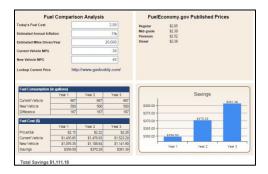
- 1. Click on the Sales Tools link in the top right corner of the screen, above the blue toolbar.
- 2. Because Fuel Comparison appears at the top of the **Tools** list in the left navigation panel, the application will automatically open.
- 3. Any default figures that you've entered in the Fuel Comparison setup will automatically populate the Fuel Comparison Analysis box when you open the tool. If these figures are incorrect or out of date, you can enter updated figures in the **Today's Fuel Cost** and **Estimated Annual Inflation** fields to override the default figures.



- 4. If you've entered a figure in the Estimated Miles Driven/Year field that does not match the customer's driving practices, enter a more accurate estimate in the field to override the default figure.
- 5. Enter the miles per gallon of the customer's current vehicle in the **Current Vehicle MPG** field.
- 6. Enter the miles per gallon of the deal vehicle in the **New Vehicle MPG** field.

Tip: If you do not know the current price of gas in your customer's region, click the link to **Gas**Buddy at the bottom of the Fuel Comparison Analysis box to search for gas prices by city and state or ZIP code. A list of national averages for gas prices is also available to the right of the Fuel Comparison Analysis in a box titled "FuelEconomy.gov Published Prices."

7. The **Fuel Consumption (in gallons)** and **Fuel Cost (\$)** tables will populate with the calculations based on the information you've entered. **Total Savings** is also calculated.



Note: The rate of inflation entered in the Fuel Comparison Analysis data is applied to each year in the **Fuel Cost** table, including **Year 1**.

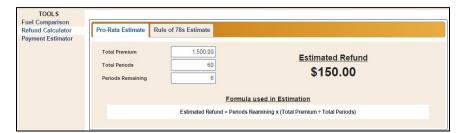
Refund Calculator

The Refund Calculator can provide estimated refund amounts of optional products and/or finance charges due upon early payoff or termination of a previous finance contract. The calculator can use one of two methods to create the refund estimate: Pro-Rata or Rule of 78.

Pro-Rata Estimate

The Pro-Rata Estimate is the more commonly used of the two refund options. To use this method:

- 1. Click the **Sales Tools** in the top right corner of the screen, above the blue toolbar.
- 2. From the **Tools** list in the left navigation panel, click the **Refund Calculator** link.
- 3. The application will default to the **Pro-Rata Estimate** tab.
- 4. Enter the dollar amount of the insurance premium in the **Total Premium** field.
- 5. Type total periods in the loan in the **Total Periods** field.
- 6. Enter the remaining periods of the loan in the **Periods Remaining** field.
- 7. The **Estimated Refund** will display on the right side of the box.



Note: The formula used to calculate the estimate is displayed in the box at the bottom of the **Refund Calculator** box.

Rule of 78 Estimate

The Rule of 78 Estimate can be used to find a refund of unearned finance charges for a customer's current vehicle if the account pays off before maturity.

- 1. Click the Sales Tools link above the blue toolbar on any page of FLEX DMS F&I.
- 2. From the **Tools** list in the left navigation panel, click the **Refund Calculator** link.
- 3. Click on the Rule of 78s Estimate tab.
- 4. Enter the total dollar amount of finance charges in the **Total Finance Charges** field.
- 5. Type the number of months in the total term of the financing in the **Total Term (Months)** field.
- 6. Enter the months remaining in the loan in the Months Remaining field.
- 7. The **Estimated Refund** will display on the right side of the box.



Note: The formula used to calculate the estimate is displayed in the box at the bottom of the Refund Calculator box.

Payment Estimator

The Payment Estimator can be used to provide an on-the-spot estimate of monthly payments for a customer without fully desking a deal. This is just an estimate, and a range option may be enabled to provide a payment range when presenting the estimate to a customer. The tool can be used to estimate monthly retail, balloon, and lease payments or to display different monthly payment options based on the terms of the financing.

Retail Estimate

- 1. Click the Sales Tools link above the blue toolbar on any page of FLEX DMS F&I.
- 2. From the **Tools** list in the left navigation panel, click the **Payment Estimator** link.
- 3. The application will open to the **Retail Estimate** tab as a default.
- 4. Enter a rough estimate of the amount to be financed in the **Amount Financed** field. Remember to take into account tax, title, add ons, and fees, not merely the price of the vehicle and adds.
- 5. In the APR field, enter the APR at which the loan will most likely be financed.
- 6. Enter the number of months the customer wishes to take to pay off the loan in the **Term** (months) field.
- 7. The **Estimated Monthly Payment** will display on the right side of the screen.



- 8. If you would like to provide the customer with a payment range to help him or her understand this is not the exact monthly payment they should expect, click to check the box next to **Range**.
- 9. Next to **Type**, select either \$ or % to determine if the range will be calculated by dollar amount or percentage, respectively.
- 10. In the **Amount** field, type the dollar amount or percentage on which to base the payment range.
- 11. The Estimated Monthly Payment range will display on the right side of the screen.



Balloon Estimate

- 1. Click the Sales Tools link above the blue toolbar on any page of FLEX DMS F&I.
- 2. From the **Tools** list in the left navigation panel, click the **Payment Estimator** link.
- 3. Click the **Balloon Estimate** tab.
- 4. Enter the estimated vehicle MSRP in the MSRP field.
- 5. Type the amount the customer would need to finance in the Amount Financed field.
- 6. In the **Balloon (\$)** field, type the dollar amount of the balloon payment that would remain at the end of the payment term. The **Balloon (%)** field will then calculate automatically. If you prefer, you can instead enter the percentage of the MSRP that will remain at the end of the finance terms in the **Balloon (%)** field, and the **Balloon (\$)** field will calculate automatically.
- 7. Enter the interest rate at which the loan will be financed in the APR field.
- 8. In the **Term (months)** field, enter the length of the loan.
- 9. The **Estimated Monthly Payment** will display on the right side of the screen.
- 10. If you would like to provide the customer with a payment range to help him or her understand this is not the exact monthly payment they should expect, click the check box next to **Range**. More options appear.
- 11. Next to **Type**, select either \$ or % to determine if the range will be calculated by dollar amount or percentage, respectively.
- 12. In the **Amount** field, type the dollar amount or percentage on which to base the payment range.
- 13. The Estimated Monthly Payment range will display on the right side of the screen.

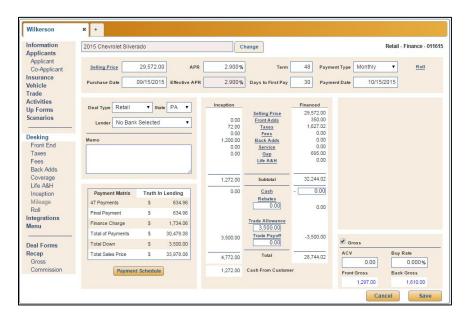
Lease Estimate

- 1. Click the Sales Tools link above the blue toolbar on any page of FLEX DMS F&I.
- 2. From the **Tools** list in the left navigation panel, click the **Payment Estimator** link.
- 3. Click the Lease Estimate tab.
- 4. Enter the vehicle's estimated MSRP in the MSRP field.
- 5. Type the dollar amount of the gross cap cost in the **Gross Cap Cost** field.
- 6. In the **Residual (\$)** field, type the dollar amount of the residual value of the vehicle at the end of the lease term. The **Residual (%)** field will then calculate automatically. If you prefer, you can instead enter the percentage of the MSRP associated with the value of the vehicle at the end of the lease terms in the **Residual (%)** field, and the **Residual (\$)** field will calculate automatically.
- 7. Enter the rate at which the lease will be financed in the Rate/Money Factor field.
- 8. Type the length of the lease in the **Term (months)** field.
- 9. The **Estimated Monthly Payment** will display on the right side of the screen.
- 10. If you would like to provide the customer with a payment range to help them understand this is not the exact monthly payment they should expect, click the check box next to Range. More options appear.
- 11. Next to **Type**, select either \$ or % to determine if the range will be calculated by dollar amount or percentage, respectively.
- 12. In the **Amount** field, type the dollar amount or percentage on which to base the payment range.
- 13. The **Estimated Monthly Payment** range will display on the right side of the screen.

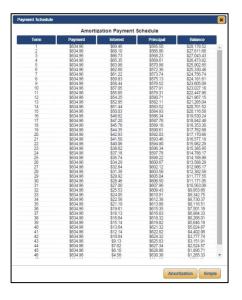
Payment Schedule

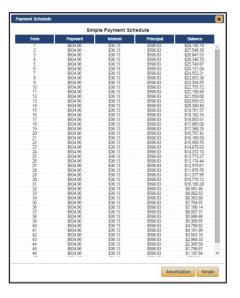
With Payment Schedule, you can show customers their payments over the life of the lease agreement or loan. The functionality is available on the main Desking screen within the **Deals** tab.

1. While in the **Deals** tab in the blue toolbar, click **Payment Schedule** in the bottom left corner of the Desking screen.



2. When viewing the Payment Schedule for a retail deal, a pop-up screen will default to an Amortization Payment Schedule, with which many consumers are familiar. To switch to the Simple Payment Schedule, click **Simple**. If the deal is a lease, a single lease payment schedule will open.





3. To exit the Payment Schedule, click the **X** in the top right corner.



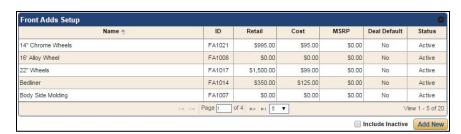
Appendix G Export Sequence Numbers Utility

The Export Sequence Numbers utility is used to export a full list of all your dealer-specific user-defined list items, including Employees, Banks, Front Adds, Back Adds, and Coverages, for submission to third-party integrations or dealership review of FLEX DMS F&I setups. The utility exports the item's name, object ID, object type, and type into a comma separated value (CSV) file that is often opened in Microsoft Excel. You can then reference this list when manually synching information in the third-party system.

Accessing Object IDs with the Export Sequence Numbers Utility

In the **Admin** area, you may maintain various lists of dealer-specific information. To ensure that employee, bank, front add, back add, coverage, and other such data that you've entered during your dealership's FLEX DMS F&I setup is accurately shared with third-party integrations, it is important that you share with the third-party the unique object ID automatically assigned to each list item by FLEX DMS F&I. For a third party to successfully submit a deal containing one of these list items to your dealership's FLEX DMS F&I, the third-party transaction MUST contain the correct object ID for the item. You'll use the export sequence numbers utility to share a complete list of pertinent object IDs with third parties.

When you add an item to a list of employees; banks; front and back adds; GAP, service, warranty, and maintenance coverage; or life A&H plans within the **Setup** tab of the **Admin** area of your FLEX DMS F&I account, FLEX DMS F&I will automatically assign a unique object ID to that list item. The object ID will appear in the column labeled **ID** (**Employee Number** in the Employee setup).



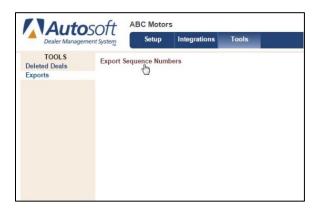
Once established in FLEX DMS F&I, all object IDs must be shared with third-party software that may use those list items in deals, as this information is crucial for successful deal transmission to FLEX DMS F&I. To ensure that the information is labeled and used appropriately by the third party, Autosoft's Export Sequence Numbers Utility within FLEX DMS F&I can be used to export a report containing all necessary information and compare field names and data.

Running the Export Sequence Numbers Report

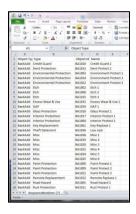
- Access the FLEX DMS F&I Admin screen by clicking the Admin link in the top right corner of the screen.
- 2. Click on the Integrations tab in the blue toolbar.



- 3. From the Integrations list in the left navigation pane, click on Flex Connect.
- 4. A link labeled **Export Sequence Numbers** will appear to the right of the left navigation panel.



5. The report will be generated in CSV format and typically saved in .XLSX format. It may be accessible through a button labeled SequenceNumbers.csv that will appear in the bottom left corner of your Web browser. Click the button to view the list.



6. Reference this list when synching information in third-party systems.





Appendix H 700 Credit

FLEX DMS F&I integrates with 700 Credit, which can be used to pull customers' credit reports and follow mandatory compliance safeguards. An account must be established with 700 Credit prior to using the integration. Once your 700 Credit account has been established, you can use the integration to perform a variety of credit reporting functions and identity verification tasks.

700 Credit Integration Setup

- 1. Click the **Admin** link at the top right of the screen.
- 2. Click on the Integrations tab in the blue toolbar.



- 3. Click on 700 Credit in the left navigation panel.
- 4. Click the Setup tab.
- 5. Enter a User Name and Password and click Save.
- 6. Click the **Transactions** tab to review the list of 700 Credit products that have been enabled for your dealership by Autosoft. You cannot make changes to these settings; however, if you believe there is an error, contact the Autosoft Customer Support Center at 800.473.4630.



7. Click **Save** to finalize the setup process.

Using 700 Credit

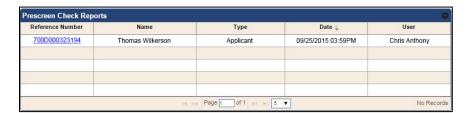
You can easily complete the important credit check and identity verification portion of a sale using 700 Credit. The integration within FLEX DMS F&I allows you to run a credit prescreen, pull a full credit report, screen customers against the U.S. Treasury's Office of Foreign Assets Control (OFAC) terrorist list, and check for any identity theft red flags within credit reports.

700 Credit can be accessed when working a deal within the **Deals** tab.

Running a Prescreen Check

A prescreen credit check allows you to get an idea of a customer's credit profile early in the sales process without obtaining their social security number or permission to pull a credit report. This allows you to have an informed conversation with the customer during the sales process.

- 1. While on the **Deals** tab, click on the **Integrations** link in the left navigation panel.
- 2. From the Integration Organization list, select 700 Credit.
- 3. Choose 700 Prescreen Check from the Transactions list.
- 4. In the **Prescreen Check** box, click to select the applicant's name, co-applicant's name (if applicable), or Joint to request a joint report for married couples only.
- 5. Click Send.
- 6. The returned prescreen report(s) will display at the bottom of the Integrations screen in the **Prescreen Check Reports** box. Click a report to view the full report.



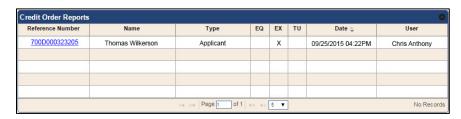
Running a Credit Check

Running a credit check using 700 Credit and FLEX DMS F&I is simple, as 700 Credit uses the customer information you've already entered in FLEX DMS F&I. The application allows you to choose one of the three major credit bureaus (Equifax, Experian, and TransUnion).

- 1. While in a deal, click on the **Integrations** link in the left navigation panel.
- 2. From the Integration Organization list, select 700 Credit.
- 3. Choose 700 Credit Check from the Transactions list.
- 4. In the **Credit Order** box, click to select the applicant, co-applicant (if applicable), or **Joint** to request a joint report for married couples (if applicable).
- 5. Click to select the credit bureau or bureaus from which you'd like to pull a report.



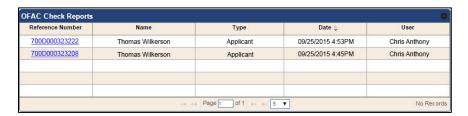
- 6. Click Send.
- 7. The returned credit report(s) will display at the bottom of the Integrations screen in the **Credit Order Reports** box. Click the report's **Reference Number** to view the full report.



Running OFAC and Red Flag Checks

It is mandatory that your dealership screen every customer against the U.S. Treasury's OFAC terrorist list and check for any identity theft red flags when pulling credit reports. Both operations require the same steps within the 700 Credit integration.

- 1. While in a deal, click on the **Integrations** link in the left navigation panel.
- 2. From the Integration Organization list, select 700 Credit.
- 3. Choose 700 OFAC Check or 700 Red Flag Check from the Transactions list.
- 4. In the **OFAC Check** or **Red Flag Check** box, click to select the applicant, co-applicant (if applicable), or **Joint** to request a joint report for married couples (if applicable).
- 5. Click Send.
- The returned OFAC Check and Red Flag report(s) will display at the bottom of the Integrations screen in the OFAC Check Reports or Red Flag Check Reports box, respectively. Click a report's Reference Number to view the full report.









Appendix I Credco

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

Credco Integration Setup

You need to verify your FLEX DMS F&I 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 the **Admin** link in the top right corner of the screen above the blue toolbar.
- 2. In the blue toolbar, click Integrations.
- 3. Click **CredCo** in the Integrations list in the left panel.
- 4. If Credco has been enabled for your dealership, the box next to Credco Request Credit on the Transactions tab will be checked.



5. Click the Setup tab.



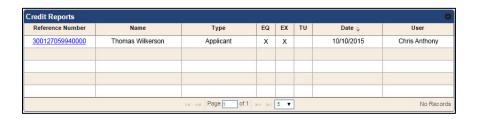
- 6. Type your dealership's Credco username and password.
- 7. Click **Save**. The setup is now complete.

Requesting Credit Reports

- 1. From within a deal in the **Deals** tab in the blue toolbar, 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 bureau/s you wish to use.



- 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's **Reference Number** to view the full report.









Appendix J CUDL

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

CUDL Integration Setup Verification

Autosoft's Customer Support Center will set up the integration between your FLEX DMS F&I account and CUDL to allow you to transfer deal information to CUDL. **You do not need to take any steps to set up the integration.** You can, however, verify that the integration has been established. To verify the account, follow these steps:

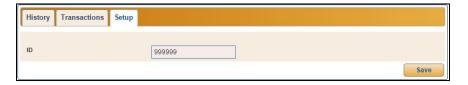
- 1. Click the Admin link in the top right corner of the screen above the blue navigation bar.
- 2. In the blue navigation bar, click Integrations.
- 3. From the Integrations list in the left navigation panel, click CUDL.
- 4. Click the Transactions tab and verify that the CUDL Deal Transfer box is checked.

If the CUDL Deal Transfer box is not checked, contact a FLEX DMS F&I support representative in the Autosoft Customer Support Center for assistance.



- 5. Click the Setup tab.
- 6. Verify that your dealership's CUDL ID is entered in the **ID** field.

If the ID field is blank, contact a FLEX DMS F&I support representative in the Autosoft Customer Support Center for assistance.



Submitting Deal Information

Once Autosoft's Customer Support Center has established the integration between your FLEX DMS F&I account and CUDL, 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 in to the CUDL Website to complete and submit the application.

- 1. Create a deal.
- 2. Click Integrations in the left navigation panel.
- 3. Select CUDL from the Integrations Organization drop-down menu.
- 4. Select CUDL Deal Transfer from the Transactions drop-down menu.



- 5. In the **Deal Transfer** section, 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.

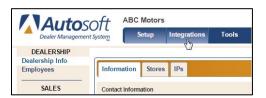


- 7. If the information contains errors, the status will read, "Rejected," followed by the time stamp for the transfer, and the program will display an error message identifying the information that must be corrected. Correct the information and send the deal again.
- 8. Click the URL on the screen to go to the log-in page of the CUDL Website. You will need to review the deal information and add any additional information required. The credit application is not compete until you finish submitting it through CUDL's Website.

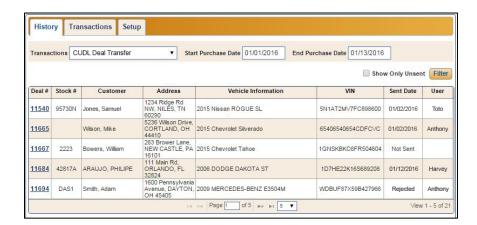
Reviewing the CUDL Transaction Log

Users with administrative rights (those who can access the system 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 right corner of the screen, above the blue navigation bar.
- 2. Click the **Integrations** tab in the blue navigation bar.

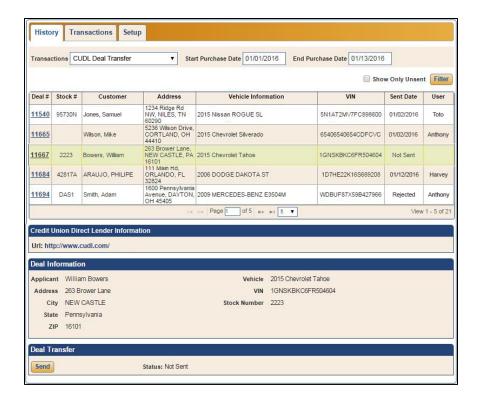


- 3. From the Integrations list in the left navigation panel, click CUDL.
- 4. The **History** tab displays all the open deals.
- 5. The **Sent Date** column identifies the date the deal was sent. The column displays "Not Sent" for deals that haven't been submitted or "Rejected" for deals that CUDL did not accept.



- 6. You can filter the list using the Start Purchase Date and End Purchase Date fields.
- 7. To view only the deals that have not been sent to CUDL, 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 below the list.
- 9. You can click **Send** in the **Deal Transfer** section to submit unsent deals right from this screen.









Appendix K Dealertrack

The Dealertrack integration allows you to transfer deal information to the Dealertrack Website. You will then log in to the Dealertrack Website, enter any additional information, and submit the credit application.

Dealertrack Integration Setup Verification

Autosoft's Customer Support Center will set up the integration between your FLEX DMS F&I account and Dealertrack to allow you to transfer deal information to Dealertrack. **You do not need to take any steps to set up the integration.** You can, however, verify that the integration has been established. To verify the account, follow these steps:

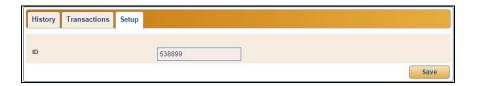
- 1. Click the Admin link in the top right corner of the screen above the blue navigation bar.
- 2. Click the **Integrations** tab in the blue navigation bar.
- 3. From the Integrations list in the left navigation panel, click **Dealertrack**.
- 4. Click the **Transactions** tab and verify that the **Dealertrack Deal Transfer** box is checked.

If the Dealertrack Deal Transfer box is not checked, contact a FLEX DMS F&I support representative in the Autosoft Customer Support Center for assistance.



5. Click the **Setup** tab and verify that the ID assigned to your dealership by Dealertrack appears in the **ID** field.

If the ID field is empty, contact a FLEX DMS F&I support representative in the Autosoft Customer Support Center for assistance.



Submitting 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 in to the Dealertrack Website to complete and submit the credit application.

- 1. Create the deal.
- 2. Click Integrations in the left navigation panel.
- 3. In the Integration Organization drop-down menu, select Dealertrack
- 4. Select Dealertrack Deal Transfer in the Transactions list.



- 5. In the Deal Transfer section, click Send.
- 6. The deal information will be sent, and the status will read, "Sent," followed by the time stamp for the transfer.



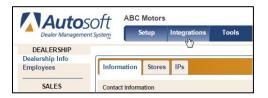
If the information contains errors, the status will read, "Rejected," followed by the time stamp for the transfer, and the program will display an error message identifying the information that must be corrected. Correct the information and resend the deal.

7. Click the URL in the screen's **Dealertrack Information** section to go to the log in page of the Dealertrack Website. You will need to review the deal information and enter any necessary additional information. 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 in the top right corner of the screen above the blue toolbar.
- 2. Click the **Integrations** tab in the blue navigation bar.

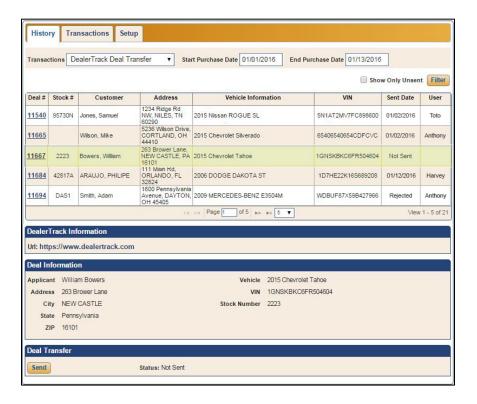


- 3. Click **Dealertrack** in the Integrations list in the left navigation panel.
- 4. The **History** tab displays all the open deals.
- 5. The **Sent Date** column identifies the date the deal was sent. The column displays "Not Sent" for deals that have not been submitted or "Rejected" for deals that Dealertrack did not accept.



- 6. You can filter the list using the **Start Purchase Date** and **End Purchase Date** fields.
- To view only the deals that have not been sent to Dealertrack, check 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.







Appendix L

Appendix L RouteOne

The RouteOne integration allows you to transmit deal information to the RouteOne Website. You will then log in to the RouteOne Website, make any additions or changes, and submit the credit application or eContract.

RouteOne Integration Setup Verification

An Autosoft Customer Support Center representative will establish the integration between your dealership's FLEX DMS F&I account and RouteOne. However, you may wish to verify your FLEX DMS F&I program is set up to transfer deal information to RouteOne prior to your first use of the integration. This includes verifying your RouteOne ID number is added to the RouteOne integration setup. This is the ID number RouteOne assigned your dealership when you established an account with the third party. This is also where you will choose to use the single sign-on feature available for RouteOne.

- 1. Click the Admin link in the top right corner of the screen above the blue navigation bar.
- 2. Click the **Integrations** tab in the blue navigation bar.

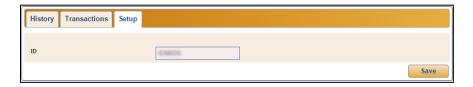


- 3. If the RouteOne integration has been activated for your FLEX DMS F&I account, RouteOne will appear in the Integrations list in the left column. Click **RouteOne**.
- 4. Click the **Transactions** tab and check to see that **RouteOne Credit Application**, **RouteOne SSO**, and **RouteOne EContract** are checked.



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. Check that your dealership's RouteOne ID is entered and correct.

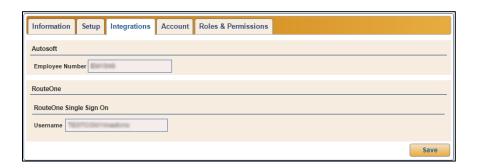


7. Click Save.

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 in to RouteOne.

- 1. Click the Admin link in the top right corner of the screen above the blue navigation bar.
- 2. Click the **Setup** tab in the blue bar at the top of the screen.
- 3. Click **Employees** under the Dealership heading in the left navigation panel.
- 4. A list of the dealership's employees will open.
- 5. Select an employee from the list by clicking on his or her name.
- 6. The employee's information populates the screen below the list.
- 7. Click the **Integrations** tab.
- 8. Autosoft provides a unique single sign-on username based on the employee's FLEX DMS F&I username. Check to see that it appears in the RouteOne section of the tab under RouteOne Single Sign On and click **Save**.



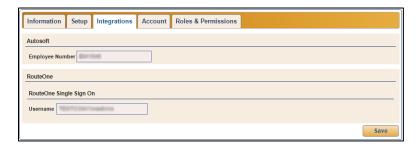
Tip: If an employee's FLEX DMS F&I login name is longer than 11 characters, it will not be appropriate for use as a RouteOne single sign on username. You will not be able to edit the single sign on username in the **Integrations** tab. However, you can edit the employee's FLEX DMS F&I login name in the **Account** tab so it is 11 or fewer characters and will work when used to create the RouteOne unique username. For directions on how to do this, see the "Employees" section of *Chapter 1 System Setup*. If you alter an employee's FLEX DMS F&I login name, be sure to alert the employee to prevent any difficulties logging in.

9. Repeat steps 3 through 8 for each employee who will use RouteOne.

Single Sign-On Setup

FLEX DMS F&I provides integration for the use of RouteOne single sign-on functionality. Following an initial, one-time setup, RouteOne single sign-on will allow your employees to quickly and easily access the RouteOne Website directly from FLEX DMS F&I with the click of a mouse.

- 1. Click the Admin link at the top right corner of the screen above the blue navigation bar.
- 2. Click on **Employees** under the Dealership heading in the left navigation panel.
- 3. A list of employees will open. Locate the employee you wish to setup with single sign-on. Click on the employee's name.
- 4. The employee information populates a box below the list. Click on the **Integrations** tab.
- 5. If the RouteOne integration has been activated for your FLEX DMS F&I account, you'll see a section titled "RouteOne" under the **Integrations** tab. In the RouteOne section, you'll see the **RouteOne Single Sign On** section's **Username** field. Copy this username, which you'll paste into RouteOne in future steps for the initial setup.



 Open another tab in your Web browser and type the RouteOne Website URL (<u>www.routeone.net</u>). Log in to RouteOne using the **User ID** (**Username** in FLEX DMS F&I's RouteOne Single Sign On section for employee) and **Password** assigned to you by RouteOne.



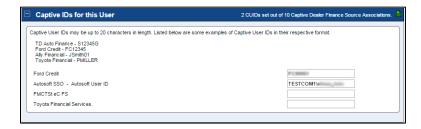
Tip: Only users with Admin access in RouteOne will be able to configure users for single sign on functionality.

7. Click on the **Admin** tab at the top of the RouteOne homepage to open a drop-down menu.

8. Select **Users** from the drop-down menu.



- 9. A list of your dealership employees with access to RouteOne will open. Select a user from the list and click the **Edit** button on that user's line.
- 10. In the Captive IDs for this User section, paste the unique single sign-on username into the Autosoft SSO Autosoft User ID field.



- 11. Click the **Save Information** button at the bottom of the page.
- 12. The user will receive an email notification at the email address entered in the **User Information** section on RouteOne. The email message will contain a Token ID number that the user will have to enter the first time he or she uses single sign-on.
- 13. Repeat steps 7 through 11 for all dealership employees who will need access to the RouteOne single sign-on feature.

Single Sign-On Activation

Once the dealership administrator has completed single sign-on (SSO) setup for a RouteOne user, the user will receive an email from RouteOne containing a Token ID number he or she must use to activate the single sign on feature for his or her account.

- 1. In FLEX DMS F&I, navigate to an established deal in the **Deals** tab or create a new deal.
- 2. Once in the deal, click **Integrations** in the left navigation panel.
- 3. Select RouteOne in the Integration Organization drop-down menu.
- 4. Choose either RouteOne Credit Application or RouteOne EContract from the Transactions drop-down menu.
- 5. Click the RouteOne Login link within the RouteOne Information.



6. The RouteOne login screen will open, and you will be prompted to enter the Token ID number that you received via email from RouteOne. You will only have to enter this information the first time you use the SSO functionality.

After your initial use of SSO, you will merely click the **RouteOne Login** link in the **Integrations** area when working a deal. You will not have to enter any RouteOne login credentials.

7. Once you are logged in to the RouteOne Website, review the deal information, make any necessary changes, and add any additional information as needed. See "Submitting Credit Applications" and "Submitting Deals for E-Contracting" for detailed instructions.

Tip: If the username in the employee's file is incorrect, the login will fail, and the employee will be directed to a page indicating the page he or she requested was not found. If an employee sees this page, the dealership's FLEX DMS F&I administrator should verify the username in the employee's file is correct. If a user arrives at this error page but the username is correct, contact RouteOne to identify the login issue.

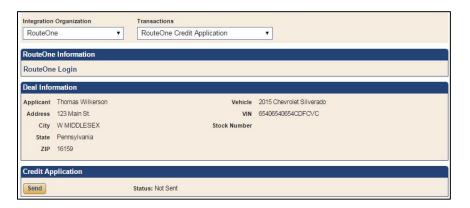
Submitting Credit Applications

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 in to the RouteOne Website or use the single sign-on function to complete and submit the application.

- 1. Open an existing deal or create a new deal.
- 2. Click Integrations.
- 3. Select RouteOne in the Integrations Organization list.
- 4. Select RouteOne Credit Application from the Transactions drop-down menu.



5. Click Send.



6. You will see a green Success message when the information has been sent, and the status will change from "Not Sent" to "Sent," followed by the time stamp for the transfer.



If the information contains errors, the status will display as "Rejected," followed by the time stamp for the transfer, and the program will display an error message identifying the information that must be corrected. Correct the information and send the deal again.

Submitting Deals for eContracting

Dealerships employing Autosoft's FLEX DMS F&I have the ability to send a credit application from FLEX DMS F&I to the RouteOne Website. From there, the user will submit the application to the lenders. Once a lender buys the contract, the F&I user will finalize the deal in FLEX DMS F&I, applying the lender information, adjusting the APR, selling back-end products, etc.

The following process assumes that the dealership has already fully desked the deal and is ready to submit the finalized deal to the RouteOne Contracts module for the processing of the eContract.

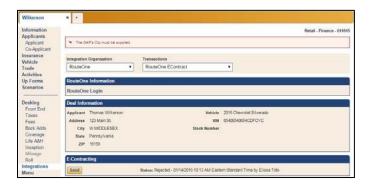
- 1. Open a deal.
- Click Integrations in the left navigation panel.
- 3. Select RouteOne from the Integration Organization drop-down menu.
- 4. In the **Transactions** field, select **RouteOne EContract** from the menu.



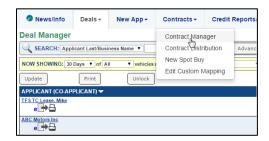
- 5. In the E-Contracting section, click Send.
- 6. The transaction will display as "Sent," followed by the time stamp for the transaction.



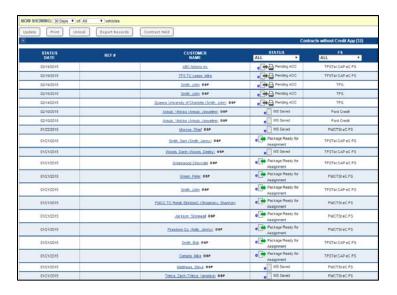
If the information contains errors, the status will read, "Rejected," followed by the time stamp for the transfer, and the program will display an error message identifying the information that must be corrected. Correct the information and resend the deal.



- Click RouteOne Login in the RouteOne Information section to connect to the RouteOne Website.
- 8. Once logged in to the RouteOne site, click **Contracts** and click on **Contract Manager** from the drop-down menu.



The Contract Manager screen will open and display a list of deals you've submitted from FLEX DMS F&I.



10. Click on the contract you wish to process electronically.

Important: The first time you use this integration to create an eContract, you will be prompted to complete DMS mapping. Because RouteOne may use different names for some contract fields than FLEX DMS F&I or your dealership, DMS mapping allows you to match up your licensing fees and local charges with the appropriate fields in RouteOne's eContracting application. You will only need to do the DMS mapping once, and it will be applied to all future eContracts you create with RouteOne. Once mapping is complete and defaults have been established, only users with Admin access can modify the default settings.

RouteOne will warn the user if a field from the FLEX DMS F&I deal does not match any of the RouteOne eContracting fields and ask that the user map the field. For fields that will be identical in every contract, such as fees, you can lock the field to ensure the data you map to it is consistent in every contract.

11. The Contract Worksheet opens. The fields highlighted in yellow are required by RouteOne. The integration will auto-populate all the required fields with information from FLEX DMS F&I to complete the eContract.



12. Review the information to verify that the numbers are correct. If the eContract payment does not match the FLEX DMS F&I-calculated payment, be sure to enter the FLEX DMS F&I payment on the Contract Worksheet screen and verify.



13. Populate the eContract and have the customer sign.







Appendix M TriVIN

FLEX DMS F&I integrates with TriVIN. Through the integration, you can select the deals you wish to register, and FLEX DMS F&I will save the information to an XML file. TriVIN can then pick up the file from the designated directory.

TriVIN Integration Setup Verification

Autosoft's Customer Support Center will set up the integration between your FLEX DMS F&I account and TriVIN to allow you to share information to TriVIN. You do not need to take any steps to set up the integration. You can, however, verify that the integration has been established. To verify the account, follow these steps:

- 1. Click the Admin link in the top right corner of the screen above the blue navigation bar.
- 2. In the blue navigation bar, click Integrations.

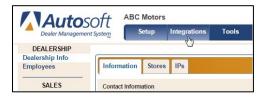


- 3. From the Integrations list in the left navigation bar, click **TriVIN**.
- 4. Click the Transactions tab.
- 5. Ensure that the TriVIN Send Deal box is checked and click Save.

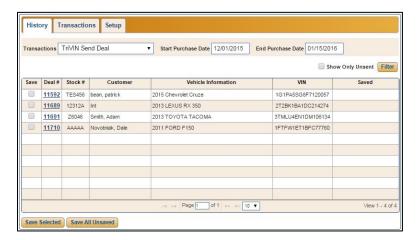


Generating the TriVIN XML Files

- 1. Click the **Admin** link in the top right corner of the screen above the blue navigation bar.
- 2. In the blue navigation bar, click the **Integrations** tab.

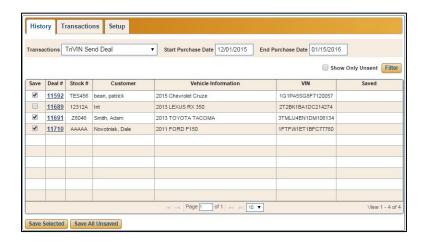


- 3. From the left navigation panel, click **TriVIN** in the Integrations list.
- 4. The **History** tab displays closed deals.



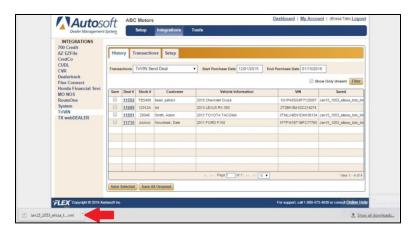
- 5. The system lists the deals from the beginning of the current month to date. You can edit the date range as needed by typing the desired dates in the **Start Purchase Date** and **End Purchase Date** fields or clicking in the fields to open a calendar from which you can select the appropriate dates.
- 6. Click to check the **Save** box in front of the deals you wish to send.

7. Click **Save Selected**. You can also click **Save All Unsaved** if you wish to save all the displayed deals to the xml file.

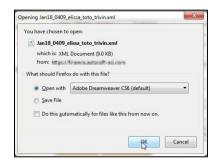


8. The file will be downloaded. Depending on your Web browser setting, you will access the file in one of two ways.

In the first method, a download button will appear at the bottom left corner of your Web browser window. Click the download button to open the file.



In the second method, a dialog box will open after you click one of the save options. Click to select **Open with**, and click **OK**.



- 9. In either method, the file will open in the default XML editor for your computer, which will most likely be your Internet browser.
- 10. Click File, and select Save As.
- 11. 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.
- 12. Click Save.
- 13. 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.

The list defaults to the first five employees in your dealership based alphabetically on last name. To expand the list, click the down arrow beneath the list and choose a different number of employees to display from the drop-down menu. If the employee does not appear on the first page of the expanded list, use the directional arrows beneath the list to navigate to the appropriate employee listing.