

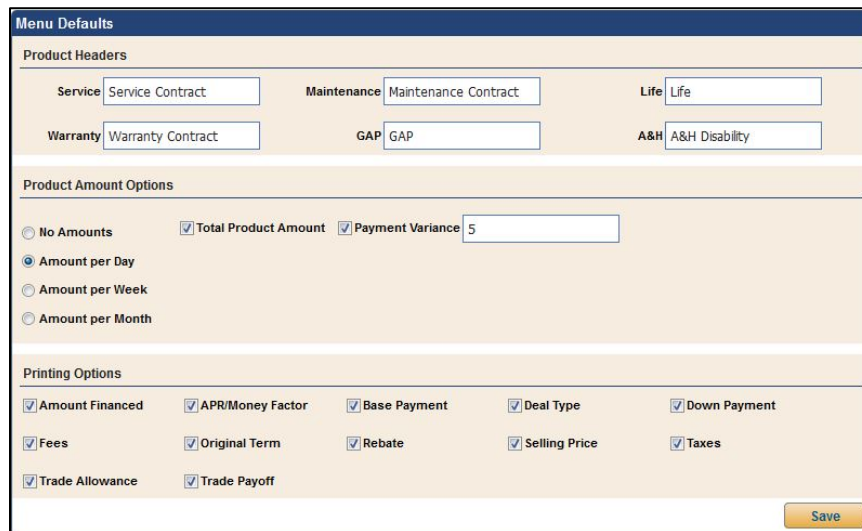
## Appendix E Menu Selling

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.
4. 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.

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

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

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

3. If you prefer to use the installed disclosures, click **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.

The screenshot shows the "Menu Disclosures" form with the "Retail Disclosure" section populated with the following text:

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

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

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.

The screenshot shows the 'Template Info' form. The 'Name' field contains 'Retail - Used'. The 'Deal Type' dropdown menu is open, showing options: 'Lease', 'Retail' (highlighted), 'Cash', and 'Balloon'. The 'Inventory Type' dropdown menu is set to 'All'. Below the dropdowns, there are four 'Option' fields, each containing 'Option 1' through 'Option 4' respectively.

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.

The screenshot shows the 'Template Info' form with the 'Deal Type' dropdown set to 'Retail'. The 'Package Names' section has four input fields: 'Option 1' contains 'Bronze', 'Option 2' contains 'Silver', 'Option 3' contains 'Gold', and 'Option 4' contains 'Option 4'. Below this, the 'Menu Products' section is visible, showing a table with columns for 'Product Type', 'Provider', and 'Plan'. The 'Plan' column has four entries: 'Bronze', 'Silver', 'Gold', and 'Option 4', each with a checked checkbox. A green plus button is located at the bottom right of the 'Menu Products' section.

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**.

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

- To remove a product, click the red **X** button next to the product.
- 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.

Menu Products						
Product Type	Provider	Plan	<input checked="" type="checkbox"/> Bronze	<input checked="" type="checkbox"/> Silver	<input checked="" type="checkbox"/> Gold	<input checked="" type="checkbox"/> Platinum
Warranty	First Care Co.	BasicCARE	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Warranty	First Care Co.	PremiumCARE	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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

Menu Products		
Product Type	Provider	Plan
Warranty	First Care Co.	BasicCARE
Warranty	First Care Co.	PremiumCARE

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

## Removing Templates

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

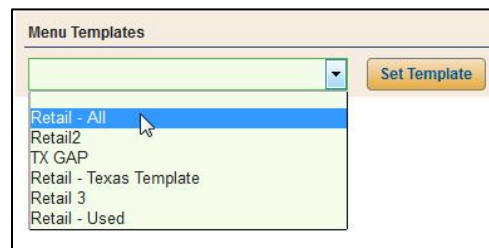
## Using Menu Selling

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.
2. 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.

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

Name	<input checked="" type="checkbox"/> Platinum	<input checked="" type="checkbox"/> Gold	<input checked="" type="checkbox"/> Silver	<input checked="" type="checkbox"/> Copper
Service GMPP Basic Guard	<input checked="" type="checkbox"/> 1,495.00	<input checked="" type="checkbox"/> 1,495.00	<input checked="" type="checkbox"/> 1,495.00	<input checked="" type="checkbox"/> 1,495.00
GAP NEW GAP NEW GAP	<input checked="" type="checkbox"/> 500.00	<input checked="" type="checkbox"/> 500.00	<input checked="" type="checkbox"/> 500.00	<input checked="" type="checkbox"/> 500.00
Life Protective OH Life	<input checked="" type="checkbox"/> 490.44	<input checked="" type="checkbox"/> 471.54	<input checked="" type="checkbox"/> 468.42	<input type="checkbox"/>
Maintenance Five Star Service Simple Care	<input checked="" type="checkbox"/> 175.00	<input checked="" type="checkbox"/> 175.00	<input type="checkbox"/>	<input type="checkbox"/>
A&H Protective OH A&H	<input checked="" type="checkbox"/> 811.46	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Back Add Credit Guard Credit Guard 2	<input checked="" type="checkbox"/> 250.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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

Platinum  
  
 1,495.00

**Service** [Close]

Active

Retail: 1,495.00    Cost: 595.00

Term: 36    Mileage: 36,000

Deductible: 75.00     Is Disappearing

Cancel    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.

Name	<input checked="" type="checkbox"/> Platinum	<input checked="" type="checkbox"/> Gold	<input checked="" type="checkbox"/> Silver	<input type="checkbox"/> Copper
Service GMPP Basic Guard	<input checked="" type="checkbox"/> 1,495.00	<input checked="" type="checkbox"/> 1,495.00	<input checked="" type="checkbox"/> 1,495.00	<input checked="" type="checkbox"/> 1,495.00
GAP NEW GAP NEW GAP	<input checked="" type="checkbox"/> 500.00	<input checked="" type="checkbox"/> 500.00	<input checked="" type="checkbox"/> 500.00	<input checked="" type="checkbox"/> 500.00
Life Protective OH Life	<input checked="" type="checkbox"/> 490.44	<input checked="" type="checkbox"/> 471.54	<input checked="" type="checkbox"/> 468.42	<input type="checkbox"/>
Maintenance Five Star Service Simple Care	<input checked="" type="checkbox"/> 175.00	<input checked="" type="checkbox"/> 175.00	<input type="checkbox"/>	<input type="checkbox"/>
A&H Protective OH A&H	<input checked="" type="checkbox"/> 811.46	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Back Add Credit Guard Credit Guard 2	<input checked="" type="checkbox"/> 250.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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.

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

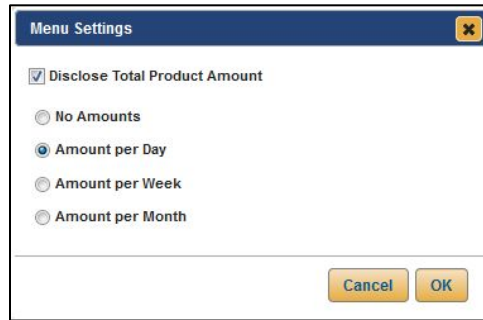
Payments (Monthly)							Reset NetSalePrice
Term	APR	Base	Platinum	Gold	Silver	Copper	Print
<input type="radio"/> 43	2.900%	593.73	644.39	665.64	655.05	593.73	<input checked="" type="checkbox"/>
<input checked="" type="radio"/> 48	2.900%	535.05	582.53	601.00	591.44	535.05	<input checked="" type="checkbox"/>
<input type="radio"/> 53	2.900%	487.44	532.53	548.60	539.88	487.44	<input checked="" type="checkbox"/>

Cancel Save

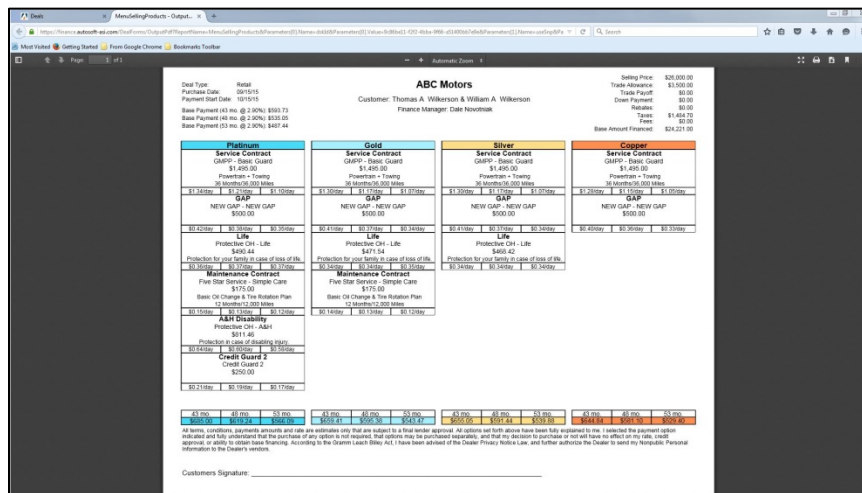
**Tip:** The Payments section for lease deals will include a Residual column for each line.

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

- 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.



- 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.

Name	<input checked="" type="checkbox"/>	Platinum
<b>Service</b> GMP Basic Guard	<input checked="" type="checkbox"/>	1,495.00
<b>GAP</b> NEW GAP NEW GAP	<input type="checkbox"/>	500.00
<b>Life</b> Protective OH Life	<input checked="" type="checkbox"/>	481.27
<b>Maintenance</b> Five Star Service Simple Care	<input checked="" type="checkbox"/>	175.00
<b>A&amp;H</b> Protective OH A&H	<input checked="" type="checkbox"/>	796.28
<b>Back Add</b> Credit Guard Credit Guard 2	<input checked="" type="checkbox"/>	250.00

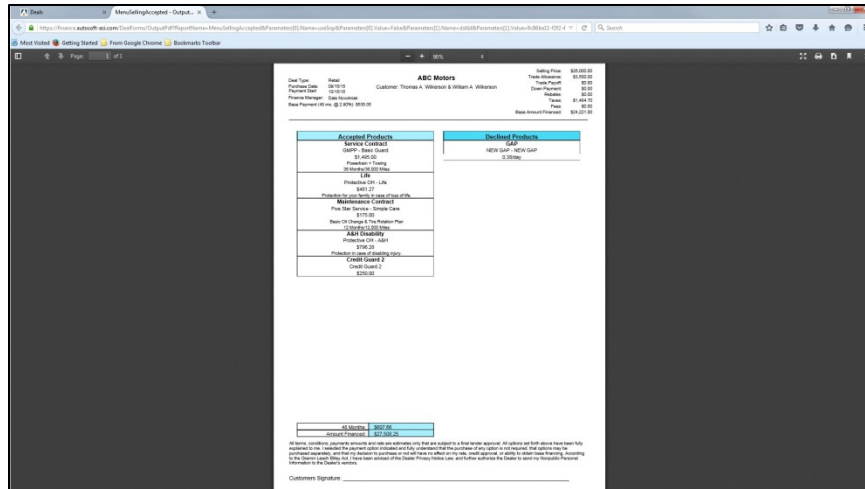
12. Once the customer decides on a package, select the package from the **Selected Package** list.

<b>Menu Products</b>	
Selected Package	<input type="button" value="Settings..."/>
<div style="border: 1px solid black; padding: 2px;"><ul style="list-style-type: none"><li>Platinum</li><li>Gold</li><li>Silver</li><li>Copper</li></ul></div>	<input checked="" type="checkbox"/> Platinum
Basic Guard	<input checked="" type="checkbox"/> 1,495.00

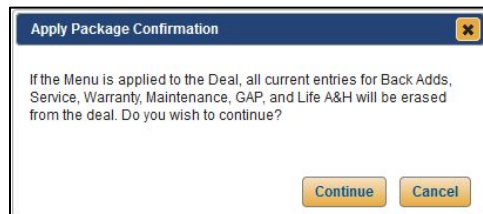
13. Click the **Print Acceptance** link.

<b>Menu Products</b>				
Selected Package	<input type="button" value="Settings..."/>	<a href="#">Print Menu</a>	<a href="#">Print Acceptance</a>	<input type="button" value="Apply"/>
Platinum	<input checked="" type="checkbox"/> Platinum	<input checked="" type="checkbox"/> Gold	<input checked="" type="checkbox"/> Silver	<input checked="" type="checkbox"/> Copper

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



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



# Printing the Acceptance Form for a Frozen Deal

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

The screenshot shows a software interface for a deal. The top bar is orange and contains the name 'Miller' and a window control icon. Below the bar is a navigation sidebar on the left with categories: Information, Desking, Integrations, and Deal Forms. The main content area is divided into several sections:

- Print Menu Acceptance Retail - Sold - 011644**: A link in the top right of the main area.
- Financed**: A table with columns 'Description' and 'Amount'.

Description	Amount
Base Selling Price +	10,250.00
Total Financed Tax +	717.50
Sub Total =	10,967.50
Total =	10,967.50
- Inception**: A table with columns 'Description' and 'Amount'.

Description	Amount
Total =	0.00
- Terms and Conditions**: A table with key-value pairs.

Payment Type	Monthly
Payment Date	11/27/2015
Purchase Date	10/28/2015
Term	60
Days to First Pay	30
Rate	10.000%
Effective Rate	10.000%
- Truth In Lending**: A table with columns 'Description' and 'Amount'.

Description	Amount
59 Payments =	233.03
Final Payment =	233.03
Finance Charge =	3,014.30
Total of Payments =	13,981.80
Total Down =	0.00
Total Sales Price =	13,981.80
- Memo**: A section with the text 'No text entered.'

