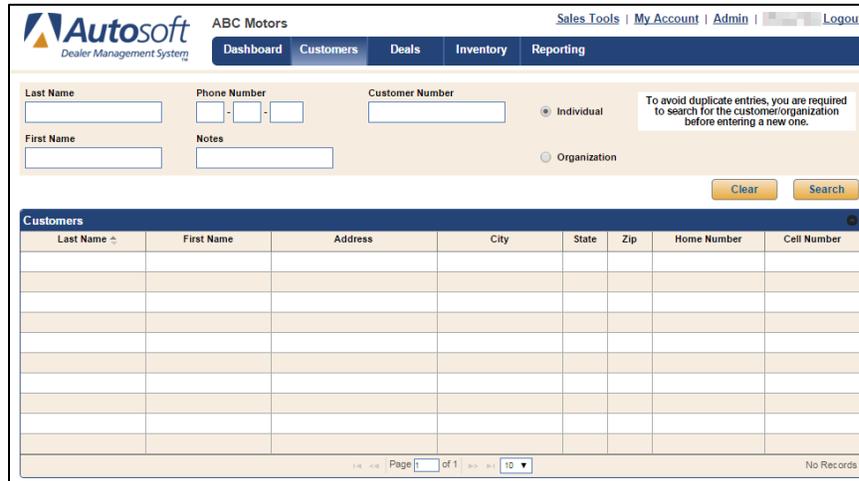


Chapter 2 Customers

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.

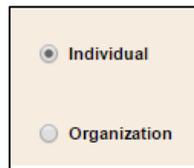
Searching for Customers

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.



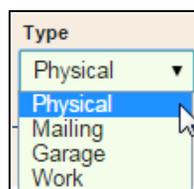
3. Type the information you wish to use to search for the customer. Keep the following guidelines in mind.
 - When typing partial entries in the **Name** fields, the program will provide results for all customer names containing the partial search criteria.
 - If you select to search by a phone number, 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.

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

- 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.

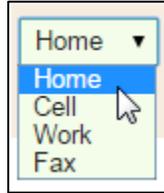
Note: Once a user has entered a customer's social security number in the **SSN** field, FLEX DMS F&I masks the number for the customer's protection. However, users with sufficient permissions can view an applicant's or co-applicant's social security number on the customer information screen by simply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

- 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.

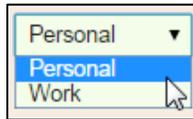


Tip: Once you type the street address, you can type the ZIP code in the ZIP field and click the **Decode** button. The ZIP decoder will decode the ZIP code and provide city, state, and county options for you to select. The corresponding fields will fill in with the selected data.

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.
2. Use the **Employer** and **Previous Employer** sections to record the customer's employment information.

The screenshot shows the 'Credit Information' tab selected. It contains two main sections: 'Employer' and 'Previous Employer'. Each section has the following fields:

- Name: Text input
- Address: Text input
- Apt./Suite: Text input
- City: Text input
- State: Dropdown menu
- ZIP: Text input
- Phone: Text input with hyphens for area code, number, and extension
- Occupation: Text input
- Years Worked: Text input
- Months Worked: Text input
- Self Employed: Checkmark
- Income: Text input (pre-filled with 0.00)
- Payment Frequency: Dropdown menu

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

The screenshot shows the 'Income' section with the following fields:

- Previous Financing: Text input
- Additional Yearly Income: Text input (pre-filled with 0.00)
- Additional Income Sources: Text input
- Checking: Text input (pre-filled with 0.00)
- Savings: Text input (pre-filled with 0.00)

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.

The screenshot shows two sections: 'Current Residence' and 'Previous Residence'.

Current Residence:

- Mortgage Co. / Landlord: Text input
- Payment/Rent: Text input (pre-filled with 0.00)
- Occupancy Type: Dropdown menu
- Mortgage Balance: Text input (pre-filled with 0.00)
- Market Value: Text input (pre-filled with 0.00)
- Years: Text input
- Months: Text input

Previous Residence:

- Address: Text input
- Apt./Suite: Text input
- City: Text input
- State: Dropdown menu
- ZIP: Text input
- County: Text input
- Occupancy Type: Dropdown menu
- Years: Text input
- Months: Text input

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

- 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

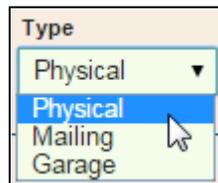
- Click the **Driver’s License** tab.

- 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.
- 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.
- Type the license number in the **Driver’s License Number** field.
- Use the **State** list to select the licensing state.
- Enter the expiration and issue dates in the corresponding fields.
- Click **Save**. A green “Success” message will verify the information has been saved.

Adding an Organization

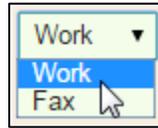
1. Search for the organization as explained in the earlier section, “Searching for Customers.”
2. If the search does not result in a match to your customer search, click the **Add New** link in the bottom right corner of the search area.
3. The **Organization Information** tab opens containing the search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

- 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.



- 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.
- 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.

- Click the **Representatives** tab.
- Click **Add New**.
- 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.

The screenshot displays the 'Organization Representatives' tab. At the top, there are two tabs: 'Organization Information' and 'Representatives'. Below the tabs is a table titled 'Organization Representatives' with columns: First, Middle, Last, Title, Primary, and Status. The table is currently empty. Below the table is a search form with fields for Last Name, First Name, Phone Number, and Customer Number. There is a radio button for 'Individual' and a note: 'To avoid duplicate entries, you are required to search for the customer/organization before entering a new one.' There are 'Clear' and 'Search' buttons. At the bottom, there is a 'Customers' table with columns: Last Name, First Name, Address, City, State, Zip, Home Number, and Cell Number. The page also shows pagination information: 'Page 1 of 1' and 'No Records'.

- 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.)

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

- Use the **Title** field to identify the representative's title within the organization.
- If you will be adding more than one representative to an organization, use the **Primary** box to flag the primary representative for the organization.
- 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.

Customer Information	
Cust No	AA91000345
Name	Ed Jones
	J&J Landscaping
Address	11 Main St
City	WEST MIDDLESEX
State	PA
County	MERCER
ZIP	16159
Phone	(724) 555-9876 (Home)
Email	edjones@jllandscaping.com (Work)
	Edit

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.

The screenshot displays a customer record interface with three main sections:

- Customer Information:** Contains fields for Cust No (AA91000345), Name (Ed Jones), Address (J&J Landscaping, 11 Main St, WEST MIDDLESEX, PA, MERCER, 16159), Phone ((724) 555-9876 (Home)), and Email (edjones@jlandscaping.com (Work)). An **Edit** button is located at the bottom right.
- Notes:** Features an **Add Note** button at the top right. Below it is a table with columns for Date, Note, and Owner. The table is currently empty. A pagination bar at the bottom shows "Page 1 of 1" and "No Records".
- Ups/Deals:** A table with columns for Status, Customer, Type, Date, Vehicle, and Sales Rep. The table is empty. Below the table, it shows "Total Sold: 0" and a **New Deal** link. A pagination bar at the bottom shows "Page 1 of 1" and "5" records.

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

The screenshot shows a dialog box titled "Enter Note" with a close button (X) in the top right corner. The text area contains the note: "Co-owner of J&J Landscaping." A **Save** button is located at the bottom right of the dialog box.

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.

Notes

[Add Note](#)

Date	Note	Owner
04/01/2015	Co-owner of J&J Landscaping.	Elissa Toto

Page 1 of 1
View 1 - 1 of 1

Co-owner of J&J Landscaping.

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.*)

Ups/Deals					
Status	Customer	Type	Date	Vehicle	Sales Rep
Finished	Organization	Retail	04/01/2015	2013 Chevrolet Silverado	Elissa Toto

Page 1 of 1
View 1 - 1 of 1

Total Sold: 1 Total Front Gross: \$3,199.00 Total Back Gross: \$1,100.00
[New Deal](#)

