

## 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.

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

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

## Using the Deals List

When you click **Deals** 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.

Deal #	Status	Type	Customer	Stock #	Vehicle Information	Purchase	Activity	Source	Salesperson	Assignee	In Use
11523	Finance	Retail	Test Deal, Greg	CU003	2007 Cadillac XLR	03/25/2015	04/07/2015	The Herald	Salesperson		
11522	Finance	Lease	Harmer, Jason	12768A	2010 CHRYSLER SEBRING TO	03/24/2015	04/07/2015	Ad	Harmer		
11434	Finance	Retail	TestDeal, Programming	987533	2014 Chevrolet Camaro	03/19/2015	04/03/2015	Drive By	Williams	Fridley	
11529	Finance	Retail	Hansson, Dave	021672	2013 Chevrolet Silverado K1500	04/01/2015	04/02/2015	Ad	Hansson		
11517	Finance	Lease	abc			03/08/2015	04/01/2015	Ad	t		
11337	Finance	Retail	Shopinsky, Mitchell	021672	2013 Chevrolet Silverado K1500	03/30/2015	03/30/2015	Ad	Shopinsky		
11521	Finance	Lease	Shopinsky, Mitchell			03/16/2015	03/25/2015	Ad	Shopinsky		
11520	Finance	Retail	Smith, John			03/15/2015	03/19/2015	Ad	t		
11518	Finance	Retail	TESTICOM	123154	2011 Chevrolet Corvette	03/10/2015	03/18/2015	Ad	t		
11516	Finance	Retail	ARAUJO, PHILIPPE	P13456	2000 AM GENERAL HMC4	03/08/2015	03/15/2015	Ad	t		

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.

Description	Allowance	Payoff	Net
A1209A - 2004 Chevrolet Silverado	\$2,000.00	\$0.00	\$2,000.00
	\$2,000.00	\$0.00	\$2,000.00

Name	Retail Cost	MSRP
Wind Spoiler	\$519.00	\$500.00
	\$215.00	

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**.

ABC Motors | Sales Tools | My Account | Admin | Logout

Dashboard Customers Deals Inventory Reporting

New

Deal Type: All | Deal Status: Active | Deal Source: | Start Purchase Date: 03/01/2015 | End Purchase Date: 05/31/2015 | Employee: All

Advanced Search Clear Filter

Deal #	Status	Type	Customer	Stock #	Vehicle Information	Purchase	Activity	Source	Salesperson	Assignee	In Use
11523	Finance	Retail	Test Deal, Greg	CU003	2007 Cadillac XLR	03/25/2015	04/07/2015	The Herald	Salesperson		
11522	Finance	Lease	Harmer, Jason	12788A	2010 CHRYSLER SEBRING TO	03/24/2015	04/07/2015	Ad	Harmer		
11434	Finance	Retail	TestDeal, Programming	987533	2014 Chevrolet Camaro	03/19/2015	04/03/2015	Drive By	Williams	Fridley	
11529	Finance	Retail	Hansson, Dave	021672	2013 Chevrolet Silverado K1500	04/01/2015	04/02/2015	Ad	Hansson		
11517	Finance	Lease	abc			03/08/2015	04/01/2015	Ad	t		
11337	Finance	Retail	Shopinsky, Mitchell	021672	2013 Chevrolet Silverado K1500	03/30/2015	03/30/2015	Ad	Shopinsky		
11521	Finance	Lease	Shopinsky, Mitchell			03/16/2015	03/25/2015	Ad	Shopinsky		
11520	Finance	Retail	Smith, John			03/15/2015	03/19/2015	Ad	t		
11518	Finance	Retail	TESTICOM	123154	2011 Chevrolet Corvette	03/10/2015	03/18/2015	Ad	t		
11516	Finance	Retail	ARAUJO, PHILIPPE	P13456	2000 AM GENERAL HMC4	03/08/2015	03/15/2015	Ad	t		

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

Enter Deal Name

Deal Name

Wilkerson

Cancel 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**.

The screenshot shows the Autosoft Dealer Management System interface for a deal. The main content area is divided into several sections:

- Deal Information:** Includes fields for Selling Price (0.00), APR (12.000%), Term (60), Payment Type (Monthly), Roll, Purchase Date (04/08/2015), Effective APR (12.000%), Days to First Pay (30), and Payment Date (05/08/2015).
- Deal Type and Lender:** Deal Type is set to Retail, State to PA, and Lender to No Bank Selected.
- Payment Matrix (Truth in Lending):**

	\$	
59 Payments	4.43	
Final Payment	4.43	
Finance Charge	66.80	
Total of Payments	265.80	
Total Down	0.00	
Total Sales Price	265.80	
- Financial Summary:**

Inception	Financed
Selling Price	0.00
Front Adds	0.00
Taxes	0.00
Fees	199.00
Back Adds	0.00
Service	0.00
Gap	0.00
Life A&H	0.00
Subtotal	199.00
Cash	0.00
Rebates	0.00
Trade Allowance	0.00
Trade Payoff	0.00
Total	199.00
- ACV and Buy Rate:** ACV is 0.00 and Buy Rate is 0.000%.

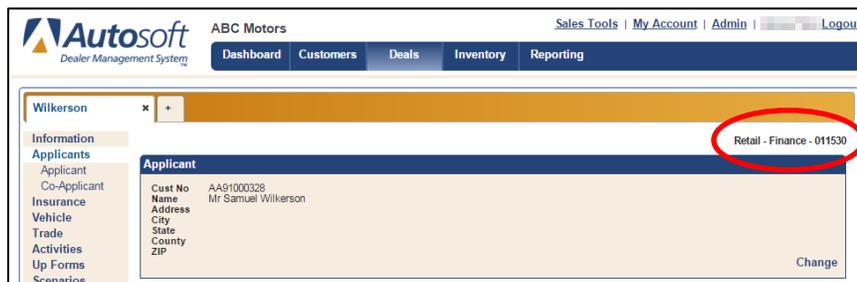
- Search for an individual or organization. Remember, you are required to search for an applicant before you can create a new record to ensure the applicant doesn't already exist in the program.
- If the applicant is not already in the system, click **Add New**. If the applicant is in the system, see the following section, "Creating a New Deal for an Existing Customer."
- Add the applicant's basic information as described in Chapter 2.
- Click **Save** to save the customer's information.
- 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.

The 'Applicant Information' dialog box contains the following information:

- Type:** Walk-In
- Deal Source:** Ad
- Salesperson:** Elissa Toto

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.

The screenshot shows a window titled "Applicant Information" with a close button in the top right corner. The window contains the following elements:

- A prompt: "Please select a Type and Source to continue."
- Three dropdown menus: "Type" (set to "Other"), "Deal Source" (set to "Ad"), and "Salesperson" (set to "Elissa Toto").
- A message: "This applicant's state is not setup. Please verify the taxes and fees for this deal."
- An "Address Information:" section with a checked checkbox labeled "Replace Address".
- Text below the checkbox: "Replace CORTLAND, OH TRUMBULL with NATICK, MA MIDDLESEX".
- Two buttons at the bottom right: "Cancel" and "Save".

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.

**Applicant Information**

Please select a Type and Source to continue.

Type	Deal Source	Salesperson
Other	Ad	Elissa Toto

**Taxes Information:**  Replace Tax Rates

Replace Tax 1 Rate 5% with 7.25%

Cancel Save

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.

The screenshot shows a web application interface for editing customer information. The browser tab is labeled 'Wilkerson'. The page title is 'Retail - Finance - 011615'. The left navigation panel includes sections for 'Information', 'Applicants', 'Insurance', 'Vehicle', 'Trade', 'Activities', 'Up Forms', 'Scenarios', 'Deskings', 'Front End', 'Taxes', 'Fees', 'Back Adds', 'Coverage', 'Life A&H', 'Inception', 'Mileage', 'Roll', 'Integrations', 'Menu', 'Deal Forms', 'Recap', 'Gross', and 'Commission'. The main content area has three tabs: 'Customer Information' (selected), 'Credit Information', and 'Driver's License'. The 'Customer Information' tab is divided into three sections: 'Basic Information', 'Address Information', and 'Phone Numbers'. The 'Basic Information' section contains fields for Prefix (Mr), First Name (Thomas), Middle Name (A), Last Name (Wilkerson), Suffix, Gender (Male), Nickname (Tom), Date of Birth (10/10/1980), Marital Status (Single), and SSN. The 'Address Information' section contains fields for Address (123 Main St), City (W MIDDLESEX), State (PA), ZIP (16159), Apt./Suite, County (MERCER), County Code, Type (Physical), and a Primary checkbox. The 'Phone Numbers' section contains fields for Area Code (724), Prefix (555), Suffix (1441), Ext., and Cell. There is also an 'Email Addresses' section with a field for Email (dwilks@email.com) and Type (Personal). A 'Save' button is located at the bottom right of the form.

## 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.

The screenshot shows a web application window titled 'Wilkerson'. On the left is a navigation menu with categories: Information, Applicants (Applicant, Co-Applicant), Insurance (selected), Vehicle, Trade, Activities, Up Forms, Scenarios, and Deskings (Front End, Taxes, Fees, Back Adds, Coverage, Life A&H, Inception, Mileage, Roll). The main content area is divided into three sections. The top section is 'Insurance Company' with a 'Name' dropdown menu and a green '+' button. The middle section is 'Insurance Agent' with a 'Name' dropdown menu. The right section contains a 'Policy Number' field, 'Effective Date' and 'Expiration Date' fields, and three checkboxes: 'Collision Deductible' (with a value of 0.00), 'Comprehensive Deductible' (with a value of 0.00), and 'Fire/Theft'. A 'Save' button is located at the bottom right of the form.

2. Use the **Insurance Company** list to select the insurance company. The list includes all companies added to the system setup. If the company you need is not in the list, click the green **+** to add a company from this screen. Type the insurance company name, and click **Save**. The company will now appear in the list. The company is also added to the setup.
3. Use the **Insurance Agent** list to select the insurance agent. 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.

The screenshot shows a form with two date fields: 'Effective Date' and 'Expiration Date'. The 'Effective Date' field contains the text '09/01/2015'. Below the 'Expiration Date' field is a calendar for September 2015. The calendar has a header 'September 2015' and days of the week 'Su Mo Tu We Th Fr Sa'. The dates are arranged in a grid, with the 15th of the month highlighted in yellow.

September 2015						
Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

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.
2. 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.

Wilkerson x + Retail - Finance - 011615

Information Applicants  
 Applicant  
 Co-Applicant  
 Insurance  
 Vehicle  
 Trade  
 Activities  
 Up Forms  
 Scenarios

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

Deal Forms  
 Recap  
 Gross  
 Commission

Status: In Inventory, Begin Year: 2010, Make: [Dropdown], Min Odom: [Text], Min Price: [Text], Payment:

Type: New, End Year: 2016, Model: [Dropdown], Max Odom: [Text], Max Price: [Text], Price:

Color: [Dropdown]

Filter Clear Filter

Stock #	Type	Status	Year	Make	Model	Trim	Body	Color	Price
02167B	New	In Inventory	2016	Chevrolet	Colorado	LT	CREW PICKUP		\$20,000.00
125484	New	In Inventory	2012	Honda	FIT	SPORT	HATCHBACK 4 DOOR WAGON 4 DOOR	Blue	\$21,999.99
2223	New	In Inventory	2015	Chevrolet	Tahoe	LT		Black	\$48,995.00
45518N	New	In Inventory	2015	Nissan	FRONTIER S		Crew	LAVA RED	\$28,705.00
456465	New	In Inventory	2015	Ferrari	F1			FRESH POWD	\$0.00

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- 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

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

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

- 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**.

The screenshot shows a web application interface for managing deals. The top navigation bar includes 'Wilkerson' and 'Retail - Finance - 011615'. The left sidebar contains a navigation menu with categories like 'Information', 'Applicants', 'Insurance', 'Trade', 'Activities', 'Desking', 'Integrations', and 'Deal Forms'. The main content area is titled 'Trade' and contains three sections: 'Vehicle Information', 'Financial Information', and 'Lien Holder'. The 'Vehicle Information' section has fields for Stock Number (02167D), VIN, Title Number, Tag, State, Description, Car Line, Suffix, Year, Make, Model, Trim, Body, Exterior Color, Interior Color, and Odometer. The 'Financial Information' section has fields for Allowance (0.00), ACV (0.00), Payoff (0.00), Repair Est (0.00), Net (0.00), and Inv MSRP (0.00). The 'Lien Holder' section has fields for Lien Holder, Address, City, State, ZIP, Phone, Term, Payment, Good Until, Daily Interest, and Lien Contact. There are 'Add New' and 'Save' buttons.

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.

Activity	Description	Owner	Date
Note	We worked basic numbers today to give Tom an idea of th...	Elissa Toto	10/09/2015 02:44 PM EST

## Adding Notes

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

**Enter Note**

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

Save

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.

Wilkerson x +

Store: ASI Auto Sales

Purchase F&I forms from Dealermarket.com Retail - Finance - 011615

Unable to print forms from mobile devices, while running in Windows Metro mode, or while Java is disabled or not installed.  
[Download Java here.](#)  Show Form Preview

Name	Form Number	Revision Date
Up Form Test 1	1	1/1/1900
Up Form Test 2	2	1/1/1900
Four Square CARS25 B	1	2/5/2015
Sales Worksheet Custom TIPT96	1	9/2/2015
Four Square (Blank)		
4-Square		
Used Vehicle Appraisal	1	5/12/2015
Sales Worksheet	1	8/27/2015
Deal Disclosure		

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.

Wilkerson

[Delete Deal](#)
[Mark as Lost](#)
Retail - Finance - 011615

**Information**

Applicants

Applicant

Co-Applicant

Insurance

Vehicle

Trade

Activities

Up Forms

Scenarios

---

Deskings

Front End

Taxes

Fees

Back Adds

Coverage

Life A&H

Inception

Mileage

Roll

Integrations

Menu

---

Deal Forms

Recap

Gross

Commission

**Applicants**

Applicant [Mr. Thomas A Wilkerson](#)

Co-Applicant [Mr. William A Wilkerson](#)

**Vehicle Insurance**

Company	Erie Insurance	Policy Number		Collision	None
Agent	John Jones	Effective Date	09/01/2015	Comprehensive	None
Phone	(987) 887-8788	Expiration Date		Fire/Theft	None

**Vehicle**

Vehicle 2016 Chevrolet Colorado LT      VIN 1GCGTCE37G1103298      Stock # 02167B

Type New      Color Black      Mileage 50

MSRP \$20,000.00      Selling Price \$15,462.00      Cash Down \$0.00

Deal Type Retail      Term 48 (Monthly)      Rate 13.000%      Payment \$309.61

**Trade**

Description	Allowance	Payoff	Net
02167D - 2005 Jeep WRANGLER UNLIMITED SAHARA	\$5,500.00	\$0.00	\$5,500.00
	\$5,500.00	\$0.00	\$5,500.00

Store

ASI Auto Sales

Type

Other

Deal Source

Ad

Salesperson

Elissa Toto

Sales Manager

Billy Thorton

Finance Manager

Dale Novotniak

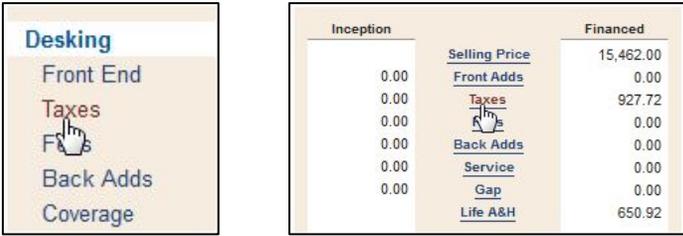
Assignee

[Save](#)

## 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.



The image shows two screenshots from the Autosoft FLEX DMS F&I system. The left screenshot shows a navigation menu with the following items: **Desking** (highlighted), Front End, Taxes, Fees, Back Adds, and Coverage. A mouse cursor is hovering over the 'Taxes' item. The right screenshot shows a table with two columns: 'Inception' and 'Financed'. The table contains the following data:

Inception		Financed
	<u>Selling Price</u>	15,462.00
0.00	<u>Front Adds</u>	0.00
0.00	<u>Taxes</u>	927.72
0.00	<u>Fees</u>	0.00
0.00	<u>Back Adds</u>	0.00
0.00	<u>Service</u>	0.00
0.00	<u>Gap</u>	0.00
	<u>Life A&amp;H</u>	650.92

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.

**Wilkerson** x +

02167B - 2016 Chevrolet Colorado LT Change Retail - Finance - 011615

Selling Price: 15,462.00 APR: 13.000% Term: 48 Payment Type: Monthly Roll

Purchase Date: 09/15/2015 Effective APR: 13.000% Days to First Pay: 30 Payment Date: 10/15/2015

Deal Type: Retail State: PA Lender: No Bank Selected

Memo:

Payment Matrix	Truth in Lending
47 Payments	\$ 309.61
Final Payment	\$ 309.61
Finance Charge	\$ 3,320.64
Total of Payments	\$ 14,861.28
Total Down	\$ 5,500.00
Total Sales Price	\$ 20,361.28

Inception	Financed
0.00	Selling Price 15,462.00
0.00	Front Adds 0.00
0.00	Taxes 927.72
0.00	Fees 0.00
0.00	Back Adds 0.00
0.00	Service 0.00
0.00	Gap 0.00
0.00	Life A&H 650.92
0.00	Subtotal 17,040.64
0.00	Cash -0.00
5,500.00	Rebates 0.00
5,500.00	Trade Allowance 5,500.00
	Trade Payoff 0.00
	Total 11,540.64
0.00	Cash From Customer

ACV: 0.00 Buy Rate: 0.000%

Front Gross: -10,038.00 Back Gross: 215.56

Buttons: Cancel Save

### Retail Desking

**Wilkerson** x +

02167B - 2016 Chevrolet Colorado LT Change Lease - Finance - 011615

Selling Price: 15,462.00 Money Factor: 0.00000000 Term: 0 Payment Type: Monthly Roll

Purchase Date: 09/15/2015 Days to First Pay: 30 Payment Date: 10/15/2015

Deal Type: Lease State: PA Lender: No Bank Selected

Memo:

Truth in Lending
Payment \$ 0.00
Total Monthly Payments \$ 0.00
Amount Due \$ 5,500.00
Disposition \$ 0.00
Total of Payments \$ 5,500.00

Inception	Financed	Residual
0.00	Selling Price 15,462.00	MSRP 20,000.00
0.00	Front Adds 0.00	MSRP Adds 0.00
0.00	Taxes 0.00	Package Discounts 0.00
0.00	Fees 0.00	Residualized Amount 20,000.00
0.00	Back Adds 0.00	Residual % 50.00
0.00	Service 0.00	Base Residual 10,000.00
0.00	Gap 0.00	Mileage Adjustment 0.00
0.00	Life A&H 0.00	Total Residual 10,000.00
0.00	Payment	
0.00	Subtotal 15,462.00	
0.00	Cash -0.00	
0.00	Rebates 0.00	
0.00	Trade Allowance 5,500.00	
0.00	Trade Payoff 0.00	
0.00	Total 9,962.00	
0.00	Cash From Customer	

ACV: 0.00 Buy Rate: 0.00000000

Front Gross: -10,038.00 Back Gross: 0.00

Buttons: SUCCESS Cancel Save

### Lease Desking

**Wilkerson** x +

Information: 02167B - 2016 Chevrolet Colorado LT Change Cash - Finance - 011615

Applicants: Applicant, Co-Applicant

Insurance: Selling Price: 15,462.00 Roll

Vehicle: Purchase Date: 09/15/2015

Trade: Deal Type: Cash, State: PA

Activities: Lender: No Bank Selected

Up Forms: Memo

Scenarios:

Selling Price	15,462.00
Front Adds	0.00
Taxes	927.72
Fees	0.00
Back Adds	0.00
Service	0.00
<b>Subtotal</b>	<b>16,389.72</b>
Cash	0.00
Rebates	0.00
Trade Allowance	5,500.00
Trade Payoff	-5,500.00
<b>Total</b>	<b>10,889.72</b>

ACV: 0.00

Front Gross: -10,038.00 | Back Gross: 0.00

Gross

Buttons: SUCCESS, Cancel, Save

**Cash Desking**

**Wilkerson** x +

Information: 02167B - 2016 Chevrolet Colorado LT Change Wholesale - Finance - 011615

Applicants: Applicant, Co-Applicant

Insurance: Selling Price: 15,462.00

Vehicle: Purchase Date: 09/15/2015

Trade: Deal Type: Wholesale, State: PA

Activities: Memo

Up Forms:

Scenarios:

Selling Price	15,462.00
Front Adds	0.00
Taxes	927.72
Fees	0.00
<b>Subtotal</b>	<b>16,389.72</b>
<b>Total</b>	<b>16,389.72</b>

ACV: 0.00

Front Gross: -4,538.00

Gross

Buttons: SUCCESS, Cancel, Save

**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**.

- 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.
- If no vehicle has been added to the deal, click **Change** and use the vehicle list to select a vehicle.

- Enter the information required for each field.

- 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.
- 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.

- 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.

Payment Matrix	Truth in Lending
47 Payments	\$ 496.88
Final Payment	\$ 496.88
Finance Charge	\$ 1,357.04
Total of Payments	\$ 23,850.24
Total Down	\$ 5,500.00
Total Sales Price	\$ 29,350.24

**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.
- 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.

Wilkerson x +

Information [Print Deal Recap](#) [Print Deal Commission](#) [Mark Sold](#) Retail - Finance - 011615

Applicants

Applicant

Co-Applicant

Insurance

Vehicle

Trade

Activities

Up Forms

Scenarios

Desking

Front End

Taxes

Recap

Vehicle 2015 Chevrolet Colorado LT Trade(s) 2005 Jeep WRANGLER UNLIMITED SAHARA

Gross and Commission Totals

		Front Commissions	Back Commissions	Reserve Commissions	Spiff	Total
Front Gross	-\$4,280.00	Billy Thorton	\$0.00	\$0.00	\$0.00	\$0.00
Back Gross	\$250.00	Elissa Toto	\$100.00	\$10.00	\$0.00	\$110.00
Total Gross	-\$4,030.00	Dale Novotniak	\$75.00	\$65.00	\$0.00	\$140.00
Total Comm	\$250.00	Total Commission	\$175.00	\$75.00	\$0.00	\$250.00
Total Net	-\$4,280.00					

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

Wilkerson x +

Information [Print Deal Recap](#) [Print Deal Commission](#) [Roll Back to Finance](#) Retail - Sold - 011615

Applicants

Applicant

Co-Applicant

Insurance

Vehicle

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Vehicle 2015 Chevrolet Colorado LT Trade(s) 2005 Jeep WRANGLER UNLIMITED SAHARA

Gross and Commission Totals

		Front Commissions	Back Commissions	Reserve Commissions	Spiff	Total
Front Gross	-\$4,280.00	Billy Thorton	\$0.00	\$0.00	\$0.00	\$0.00
Back Gross	\$250.00	Elissa Toto	\$100.00	\$10.00	\$0.00	\$110.00
Total Gross	-\$4,030.00	Dale Novotniak	\$75.00	\$65.00	\$0.00	\$140.00
Total Comm	\$250.00	Total Commission	\$175.00	\$75.00	\$0.00	\$250.00
Total Net	-\$4,280.00					

Vehicle Sold

Funded

Delivered 09/15/2015

[Deal Finished](#)

[Cancel](#) [Save](#)

## 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 screenshot shows the 'Front End' screen for a vehicle named 'Wilkerson'. The 'Selling Price' section includes fields for 'Base Selling Price' (26,220.00), 'Discount' (0.00), and 'Net Selling Price' (26,220.00). The 'Front Adds' section is a table with columns for Name, Retail, Cost, Pmt, and Tax 1. The table currently shows 'Total Additions' as 0.00. A sidebar on the left lists various options like Information, Applicants, Insurance, Vehicle, Trade, Activities, Up Forms, Scenarios, Desking, Front End, Taxes, Fees, Back Adds, Coverage, Life A&H, Inception, and Mileage. Buttons for 'Cancel' and 'Save' are at the bottom right.

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.

This close-up shows the 'Selling Price' section with the 'Base Selling Price' at 26,220.00, a 'Discount' of 220.00, and a resulting 'Net Selling Price' of 26,000.00.

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.

This screenshot shows the 'Front Adds' section with a dropdown menu open in the 'Name' column. The menu lists various front add options such as '14" Chrome Wheels', '16" Alloy Wheel', '22" Wheels', 'Bedliner', 'Body Side Molding', 'Car Cover', 'Chrome Mirrors', 'Door Edge Guards', 'DVD Headrests', 'Etch', 'H&H demo', 'Roof Rack', 'Running Boards', 'Test1', 'tint', 'Tonnaeu', 'Wind Spoiler', 'Windshield Wipers', and 'Wing'. The 'Bedliner' option is currently selected. The table below the menu shows 'Retail' (0.00) and 'Cost' (0.00) fields. 'Cancel' and 'Save' buttons are visible at the bottom right.

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 **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
	<u>Selling Price</u>	26,000.00
0.00	<u>Front Adds</u>	350.00
0.00	<u>Taxes</u>	1,581.00
0.00	<u>Fees</u>	0.00
0.00	<u>Back Adds</u>	0.00
0.00	<u>Service</u>	0.00
0.00	<u>Gap</u>	0.00
	<u>Life A&amp;H</u>	0.00
<hr/>		
0.00	<b>Subtotal</b>	27,931.00
<hr/>		
0.00	<u>Cash</u>	- <input type="text" value="0.00"/>
	<u>Rebates</u>	
	<input type="text" value="0.00"/>	0.00
	<u>Trade Allowance</u>	
	<input type="text" value="0.00"/>	
0.00	<u>Trade Payoff</u>	0.00
	<input type="text" value="0.00"/>	
<hr/>		
0.00	<b>Total</b>	27,931.00
<hr/>		
0.00	Cash From Customer	

## 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.

The screenshot shows the 'Retail Tax Screen' for a deal named 'Wilkerson'. The interface includes a left-hand navigation menu with categories like Information, Applicants, Insurance, Vehicle, Trade, Activities, Up Forms, Scenarios, Desking, Fees, Back Adds, Coverage, Life A&H, Inception, Mileage, Roll, Integrations, Menu, Deal Forms, and Recap. The main content area is titled 'Taxes - Pennsylvania' and 'Retail - Finance - 011615'. It features several tables and input fields:

- Tax 1 Table:**

	Tax 1	
Tax Rate	6.000000%	
Alt Tax Rate	0.000000%	
- Additional Tax:** Input field with value '0.00' and a checked checkbox.
- Rates for 16159:**

State:	6.000%
County:	0.000%
Local:	0.000%
Other:	0.000%
- Financed Taxes Table:**

	Tax 1		Alt Tax Rate
Vehicle	1,560.00	1,560.00	<input type="checkbox"/>
Bedliner	21.00	21.00	
<b>Total</b>	<b>1,581.00</b>	<b>1,581.00</b>	
<b>Additional Tax</b>		0.00	
<b>Total Financed Tax</b>		1,581.00	
- Inception Taxes Table:**

	Tax 1	
Total	0.00	0.00
<b>Additional Tax</b>		0.00
<b>Total Inception Tax</b>		0.00
- Total Taxes:**

<b>Total Tax</b>	1,581.00
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Buttons for 'Cancel' and 'Save' are located at the bottom right of the screen.

**Retail Tax Screen**

The screenshot shows the 'Cash Tax Screen' for the same deal 'Wilkerson'. The interface is similar to the Retail Tax Screen but with a different layout for the tax tables:

- Tax 1 Table:**

	Tax 1	
Tax Rate	6.000000%	
Alt Tax Rate	0.000000%	
- Additional Tax:** Input field with value '0.00'.
- Rates for 16159:**

State:	6.000%
County:	0.000%
Local:	0.000%
Other:	0.000%
- Financed Taxes Table:**

	Tax 1		Alt Tax Rate
Vehicle	1,560.00	1,560.00	<input type="checkbox"/>
Bedliner	21.00	21.00	
<b>Total</b>	<b>1,581.00</b>	<b>1,581.00</b>	
<b>Additional Tax</b>		0.00	
<b>Total Tax</b>		1,581.00	

Buttons for 'Cancel' and 'Save' are located at the bottom right of the screen.

**Cash Tax Screen**

Wilkerson x + Lease - Finance - 011615

Information Applicants Applicant Co-Applicant Insurance Vehicle Trade Activities Up Forms Scenarios

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

**Taxes - Pennsylvania (Monthly)**

	Tax 1	
Tax Rate	6.000000%	
Alt Tax Rate	0.000000%	
Monthly Tax	47.39	

Pmt  
Tax On Cap Reduction   
Additional Tax

Rates for 16159  
State: 6.000%  
County: 0.000%  
Local: 0.000%  
Other: 0.000%

**Financed Taxes**

	Tax 1	
Tax On Cap Reduction	0.00	0.00
Total	0.00	0.00
Additional Tax	0.00	
Total Financed Tax	0.00	

**Inception Taxes**

	Tax 1	
Tax On Cap Reduction	0.00	0.00
Total	0.00	0.00
Additional Tax	0.00	
Total Inception Tax	0.00	

**Total Taxes**

Total Tax	0.00	
-----------	------	--

Cancel Save

Lease Tax Screen

Wilkerson x + Wholesale - Finance - 011615

Information Applicants Applicant Co-Applicant Insurance Vehicle Trade Activities Up Forms Scenarios

Desking Front End Taxes Fees

**Taxes - Pennsylvania**

	Tax 1	
Tax Rate	6.000000%	
Alt Tax Rate	0.000000%	
Vehicle	1,560.00	1,560.00
Total	1,560.00	1,560.00

Alt Tax Rate

Additional Tax

Total Tax 1,560.00

Tax Vehicle

Rates for 16159  
State: 6.000%  
County: 0.000%  
Local: 0.000%  
Other: 0.000%

Cancel Save

Wholesale Tax Screen

Wilkerson
Balloon - Finance - 011615

**Information**

Applicants

Applicant

Co-Applicant

**Insurance**

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**Deskings**

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**Integrations**

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**Deal Forms**

Recap

**Taxes - Pennsylvania**

	Tax 1
Tax Rate	6.000000%
Alt Tax Rate	0.000000%

Additional Tax   **Pmt**

Rates for 16159	
State:	6.000%
County:	0.000%
Local:	0.000%
Other:	0.000%

**Financed Taxes**

	Tax 1	Alt Tax Rate
Vehicle	1,560.00	1,560.00
Bedliner	21.00	21.00
<b>Total</b>	<b>1,581.00</b>	<b>1,581.00</b>
Additional Tax	0.00	
<b>Total Financed Tax</b>	<b>1,581.00</b>	

**Inception Taxes**

	Tax 1
<b>Total</b>	<b>0.00</b>
Additional Tax	0.00
<b>Total Inception Tax</b>	<b>0.00</b>

**Total Taxes**

<b>Total Tax</b>	<b>1,581.00</b>
------------------	-----------------

**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.

Wilkerson
Retail - Finance - 011615

Information

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**Local Fees - Pennsylvania**

	Amount	Payment	Tax 1
Documentation	100.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Lien/Filing	90.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Tire	80.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Messenger	70.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Electronic/Online	40.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Misc	0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<b>Total</b>	<b>380.00</b>		

**Licensing Fees**

	Amount	Payment	
License	70.00		Plate Issued <input type="text" value="Plate Issued"/>
Registration	60.00		Permit Number 1 <input type="text" value="PERMIT1"/>
Certificate of Title	50.00		Permit Number 2 <input type="text" value="PERMIT2"/>
Transfer	40.00		Permit Number 2 Date <input type="text" value="09/09/2015"/>
Increase	30.00		
Notary	20.00		
Temp Tag	10.00		
<b>Total</b>	<b>280.00</b>	<input checked="" type="checkbox"/>	

**Total Fees** 660.00

## 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.

The screenshot displays the 'Back Adds' interface within a browser window titled 'Wilkerson'. The page header indicates 'Retail - Finance - 011615'. On the left, a navigation menu lists various categories: Information, Applicants, Insurance, Vehicle, Trade, Activities, Up Forms, Scenarios, Desking, and Front End. The main content area is a table with the following structure:

Type	Name	Retail	Cost	Pmt	+
Theft Deterrent	Low Jack	1,200.00	90.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>
		0.00	0.00	<input type="checkbox"/>	<input type="checkbox"/>

At the bottom right of the table, there are 'Cancel' and 'Save' buttons. A green '+' button is located at the bottom right of the table area, and a red 'X' button is located at the bottom right of each row.

## 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.

The screenshot shows the 'Life A&H' configuration screen for a customer named 'Wilkerson'. The interface includes a left-hand navigation menu with categories like 'Information', 'Desking', and 'Integrations'. The main content area is titled 'Life, Accidental & Health Insurance' and contains several sections: 'Life Insurance' with checkboxes for 'Applicant' and 'Co-Applicant', a 'Life Type' dropdown, and a 'Premium' field set to '0.00'; 'Accidental & Health Insurance' with checkboxes for 'Applicant' and 'Co-Applicant', dropdowns for 'A&H Type', 'Days', and 'Critical Period', and another 'Premium' field set to '0.00'. At the bottom, there is a 'Total Premium' field set to '0.00' and an 'Override Premium' checkbox. 'Cancel' and 'Save' buttons are located at the bottom right of the form.

**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.

Wilkerson x + Retail - Finance - 011615

Information  
Applicants  
Applicant  
Co-Applicant  
Insurance  
Vehicle  
Trade  
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Scenarios

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

**Cash**

Cash Down 0.00  
Cash Deposit 0.00  
Deferred Cash 0.00 Deferred Days 0  
Total Cash 0.00

**Rebates**

Name	Amount	Program #	Certificate #	Manufacturer	
	0.00			<input type="checkbox"/>	<input type="button" value="x"/>
	0.00			<input type="checkbox"/>	<input type="button" value="x"/>
Total Rebates					0.00 <input type="button" value="+"/>

Cancel Save

### Balloon, Cash, and Retail Inception

Wilkerson x + Lease - Finance - 011615

Information  
Applicants  
Applicant  
Co-Applicant  
Insurance  
Vehicle  
Trade  
Activities  
Up Forms  
Scenarios

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

Integrations  
Menu

Deal Forms  
Recap  
Gross  
Commission

**Cash**

Cash Cap Reduction 0.00  
Total Cash 0.00

**Rebates**

Name	Amount	Program #	Certificate #	Manufacturer	
	0.00			<input type="checkbox"/>	<input type="button" value="x"/>
	0.00			<input type="checkbox"/>	<input type="button" value="x"/>
Total Rebates					0.00 <input type="button" value="+"/>

**Lease Payment**

Base Payment	789.91
Monthly Tax	47.39
Total Payment	837.30

Cancel Save

### 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.

Wilkerson x + Lease - Finance - 011615

**Mileage**

Standard Miles Per Year  Total Miles   Override Per Mile Over Charge  0.00

**Mileage Adjustments**

Existing Miles	<input type="text"/>	50
Miles Over Threshold	<input type="text"/>	0 <input type="checkbox"/> From Zero
Miles Adjusted	<input type="text"/>	50
Per Mile Adjustment Charge	<input type="text"/>	0.00
<b>Total Existing Miles Adjustment</b>		0.00
Total Extra Miles	<input type="text"/>	0
Per Extra Mile Purchased Charge	<input type="text"/>	0.00
<b>Total Purchased Miles Adjusted</b>		0.00
<b>Total Miles Adjustment</b>		0.00
		Refund Per Extra Mile <input type="text"/> 0.00

Cancel Save

## 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

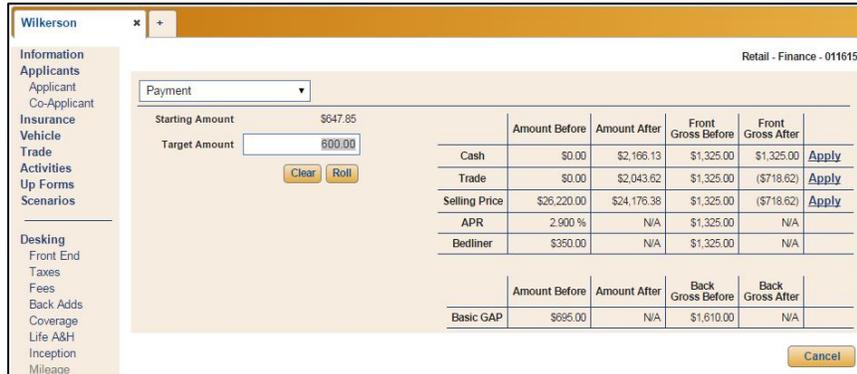
1. Click the **Roll** option under the **Desking** heading in the left navigation panel or click the **Roll** link in the top panel of the Desking screen.

2. 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.

	Amount Before	Amount After	Front Gross Before	Front Gross After	
Cash	\$0.00	\$0.00	\$1,325.00	\$1,325.00	<a href="#">Apply</a>
Trade	\$0.00	\$0.00	\$1,325.00	\$1,325.00	<a href="#">Apply</a>
Selling Price	\$26,220.00	\$26,220.00	\$1,325.00	\$1,325.00	<a href="#">Apply</a>
APR	2.900 %	2.900 %	\$1,325.00	\$1,325.00	<a href="#">Apply</a>
Bedliner	\$350.00	\$350.00	\$1,325.00	\$1,325.00	<a href="#">Apply</a>
	Amount Before	Amount After	Back Gross Before	Back Gross After	
Basic GAP	\$695.00	\$695.00	\$1,610.00	\$1,610.00	<a href="#">Apply</a>

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

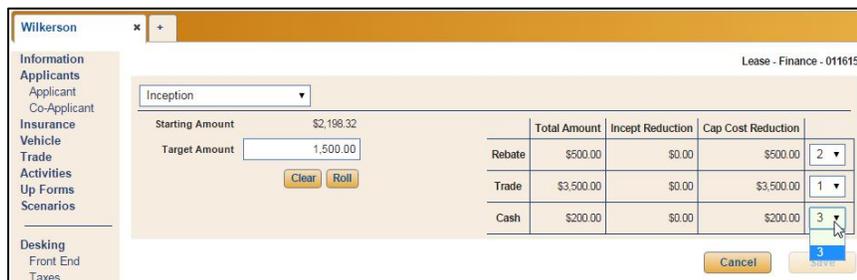
- The roll will adjust the cash, trade, selling price, APR and any rollable front adds, back adds, or coverage items that are not directly associated to a rate table to hit the target amount.



- 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.
- 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.
- The roll will be reflected in the deal.

### Rolling a Lease Deal

- 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 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.
- In **Target Amount**, type the target value.
- 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.

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Information  
Applicants  
Applicant  
Co-Applicant  
Insurance  
Vehicle  
Trade  
Activities  
Up Forms  
Scenarios

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

Total Gross

Starting Amount \$2,835.00

Target Amount 2,835.00

Clear Roll

	Amount Before	Amount After	Front Gross Before	Front Gross After	
Trade	\$0.00	\$0.00	\$1,225.00	\$1,225.00	Apply
Selling Price	\$26,220.00	\$26,220.00	\$1,225.00	\$1,225.00	Apply
Bedliner	\$350.00	\$350.00	\$1,225.00	\$1,225.00	Apply

	Amount Before	Amount After	Back Gross Before	Back Gross After	
Low Jack	\$1,200.00	\$1,200.00	\$1,610.00	\$1,610.00	Apply
Basic GAP	\$695.00	\$695.00	\$1,610.00	\$1,610.00	Apply

Cancel

- Click **Roll**.
- 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**.

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Applicant  
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Insurance  
Vehicle  
Trade  
Activities  
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Scenarios

Desking  
Front End  
Taxes

Inception

Starting Amount \$2,198.32

Target Amount 1,500.00

Clear Roll

	Total Amount	Incept Reduction	Cap Cost Reduction	
Rebate	\$500.00	\$500.00	\$0.00	2
Trade	\$3,500.00	\$221.23	\$3,278.77	1
Cash	\$200.00	\$0.00	\$200.00	3

Cancel Save

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**.

Wilkerson Lease - Finance - 011615

Information  
Applicants  
Applicant  
Co-Applicant  
Insurance  
Vehicle  
Trade  
Activities  
Up Forms  
Scenarios

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

Total Gross

Starting Amount \$2,835.00

Target Amount 2,250.00

Clear Roll

	Amount Before	Amount After	Front Gross Before	Front Gross After	
Trade	\$0.00	\$585.00	\$1,225.00	\$640.00	Apply
Selling Price	\$26,220.00	\$25,635.00	\$1,225.00	\$640.00	Apply
Bedliner	\$350.00	N/A	\$1,225.00	N/A	

	Amount Before	Amount After	Back Gross Before	Back Gross After	
Low Jack	\$1,200.00	\$615.00	\$1,610.00	\$1,025.00	Apply
Basic GAP	\$695.00	\$110.00	\$1,610.00	\$1,025.00	Apply

Cancel

- Click **Save**.
- The deal will reflect the roll.

## Rolling a Cash Deal

1. 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.

Wilkerson x + Cash - Finance - 011615

Information  
Applicants  
Applicant  
Co-Applicant  
Insurance  
Vehicle  
Trade  
Activities  
Up Forms  
Scenarios

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

Total Cash

Starting Amount \$24,763.00

Target Amount

	Amount Before	Amount After	Front Gross Before	Front Gross After	
Cash	\$200.00	\$200.00	(\$2,275.00)	(\$2,275.00)	<a href="#">Apply</a>
Trade	\$3,500.00	\$3,500.00	(\$2,275.00)	(\$2,275.00)	<a href="#">Apply</a>
Selling Price	\$26,220.00	\$26,220.00	(\$2,275.00)	(\$2,275.00)	<a href="#">Apply</a>
Bedliner	\$350.00	\$350.00	(\$2,275.00)	(\$2,275.00)	<a href="#">Apply</a>

	Amount Before	Amount After	Back Gross Before	Back Gross After	
Low Jack	\$1,200.00	\$1,200.00	\$1,110.00	\$1,110.00	<a href="#">Apply</a>

2. In **Target Amount**, type the target value.
3. 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.
5. 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.

Wilkerson x + Cash - Finance - 011615

Information  
Applicants  
Applicant  
Co-Applicant  
Insurance  
Vehicle  
Trade  
Activities  
Up Forms  
Scenarios

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

Total Cash

Starting Amount \$24,763.00

Target Amount

	Amount Before	Amount After	Front Gross Before	Front Gross After	
Cash	\$200.00	\$1,463.00	(\$2,275.00)	(\$2,275.00)	<a href="#">Apply</a>
Trade	\$3,500.00	\$4,691.51	(\$2,275.00)	(\$3,466.51)	<a href="#">Apply</a>
Selling Price	\$26,220.00	\$25,028.49	(\$2,275.00)	(\$3,466.51)	<a href="#">Apply</a>
Bedliner	\$350.00	N/A	(\$2,275.00)	N/A	

	Amount Before	Amount After	Back Gross Before	Back Gross After	
Low Jack	\$1,200.00	\$8.49	\$1,110.00	(\$81.51)	<a href="#">Apply</a>

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.

Gross and Commission Totals			Front Commissions	Back Commissions	Reserve Commissions	Spiff	Total
Front Gross	-\$2,275.00	Billy Thorton	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Back Gross	\$1,610.00	Elissa Toto	\$100.00	\$10.00	\$0.00	\$0.00	\$110.00
Total Gross	-\$665.00	Dale Novotnisk	\$75.00	\$161.00	\$0.00	\$0.00	\$236.00
Total Comm	\$346.00	Total Commission	\$175.00	\$171.00	\$0.00	\$0.00	\$346.00
Total Net	-\$1,011.00						

**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.

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Front Gross		Back Gross	
Description	Amount	Description	Amount
Net Selling Price	26,000.00	Low Jack Gross +	1,110.00
Dealer Charges +	0.00	Basic GAP Gross +	500.00
<input type="checkbox"/> Override		Lender Fee -	0.00
Total Book -	25,000.00	Subtotal =	1,610.00
Holdback -	0.00	Buy Rate	0.000%
Dealer Pack -	0.00	Participation	0.00%
Advertising -	0.00	<input type="checkbox"/> Reserve Override +	0.00
Trade Gross -	3,500.00	Total =	1,610.00
Subtotal =	-2,500.00		0.00
Bedliner Gross +	225.00	Add Adjustment +	
Trade(s) ACV +	0.00	Total Back Gross =	1,610.00
Lender Fee -	0.00		
Dealer Cash +	0.00		
Holdback +	0.00		
Dealer Pack +	0.00		
Advertising +	0.00		
Total =	-2,275.00		
	0.00		
Add Adjustment +			
Total Front Gross =	-2,275.00		

Save

**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.

Front Gross		Description	Amount
COST		Net Selling Price	26,000.00
		Dealer Charges +	0.00 <input checked="" type="checkbox"/>
	<input type="checkbox"/> Override	Total Book -	25,000.00
		Holdback -	1,000.00
		Dealer Pack -	200.00
		Advertising -	0.00
		Trade Gross -	3,500.00

Front Gross		Description	Amount
COST		Net Selling Price	26,000.00
		Dealer Charges +	0.00 <input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/> Override	Total Book -	25,000.00
		Holdback -	1,000.00
		Dealer Pack -	200.00
		Advertising -	0.00
		Trade Gross -	3,500.00

**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.

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Name	Title	Primary	Commission	Remove
Elisse Toto	Salesperson	Yes	\$110.00	
Billy Thorton	Sales Manager	Yes	\$0.00	✖
Dale Novotniak	Finance Manager	Yes	\$236.00	✖

Total Commission: \$346.00 Add New

**Commissioning Options**

Primary  Commissionable

**Commissioning Information**

Front Commission Gross	0.00	x	25.00%	=	0.00	
						100.00
Back Commission Gross	1,610.00	x	0.00%	=	0.00	
						10.00
Reserve	0.00	x	0.00%	=	0.00	
						0.00
						0.00
<b>Total Commission</b>						<b>110.00</b>

Save

**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.



The screenshot shows a dialog box titled "Vehicle Sold". It has two checkboxes: "Funded" and "Delivered". The "Delivered" checkbox is checked. To the right of the "Delivered" checkbox is a text input field containing the date "10/27/2015". On the right side of the dialog box, there is a button labeled "Deal Finished".

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.

Vehicle Sold

Funded Date Finished: 10/27/2015 11:12 AM EST

Delivered

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**.

Vehicle Sold

Funded Date Finished: 10/27/2015 11:12 AM EST

Delivered

**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.

**Unwind Deal** ✕

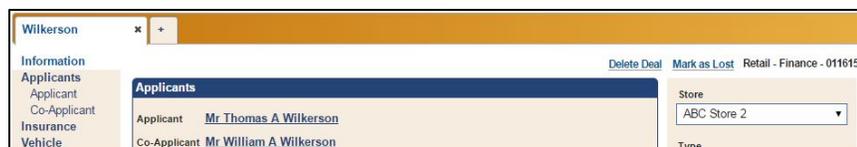
Unwinding the deal will restore the vehicle as active in the inventory and the deal as editable. Do you wish to continue?

## 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.



The screenshot shows a web application interface for a deal named 'Wilkerson'. The top navigation bar includes 'Delete Deal' and 'Mark as Lost' links. The main content area is titled 'Applicants' and lists 'Mr. Thomas A. Wilkerson' as the Applicant and 'Mr. William A. Wilkerson' as the Co-Aplicant. On the right side, there is a 'Store' dropdown menu set to 'ABC Store 2' and a 'Type' field.

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



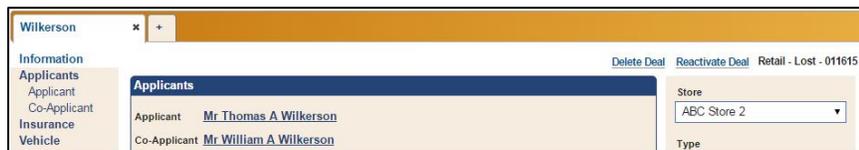
The screenshot shows a 'Lost Reason' dialog box with a close button in the top right corner. The text inside reads 'Please select the Lost Reason:'. A dropdown menu is open, displaying a list of reasons: 'Bad Credit', 'Bought Elsewhere', 'Casual Quote', 'No Match', 'No Rebates', 'Not Enough Cash Down', 'Shopping', 'Shopping Prices', and 'Upside Down'. The 'Not Enough Cash Down' option is highlighted in blue, and a mouse cursor is pointing at it.

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.
2. 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.
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.” 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.”

4. 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.

Deal Type: Retail | State: OH  
 Lender: ACME Finance  
 Memo: [Empty text area]

2012 ACURA ILX | Retail - Desking

Selling Price: 20,000.00 | APR: 4.900% | Term: 60 | Payment Type: Monthly | Roll  
 Purchase Date: 10/27/2015 | Effective APR: 4.900% | Days to First Pay: 30 | Payment Date: 11/26/2015

8. Add Front End, Taxes, Fees, Inception, and Mileage (for leases only) information as needed.
9. 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.

Payment Matrix	Truth In Lending
59 Payments	\$ 366.47
Final Payment	\$ 366.47
Finance Charge	\$ 2,521.70
Total of Payments	\$ 21,988.20
Total Down	\$ 2,200.00
Total Sales Price	\$ 24,188.20

Payment Schedule

**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.

