Chapter 1 System Setup

When you create deals, certain pieces of standard information must be entered repeatedly. Continually entering the same information takes time and leaves you vulnerable to entry errors. It is crucial to both F&I and the Sales Department that information is entered accurately and in the most efficient manner. FLEX DMS F&I makes it easy to ensure this accuracy and efficiency.

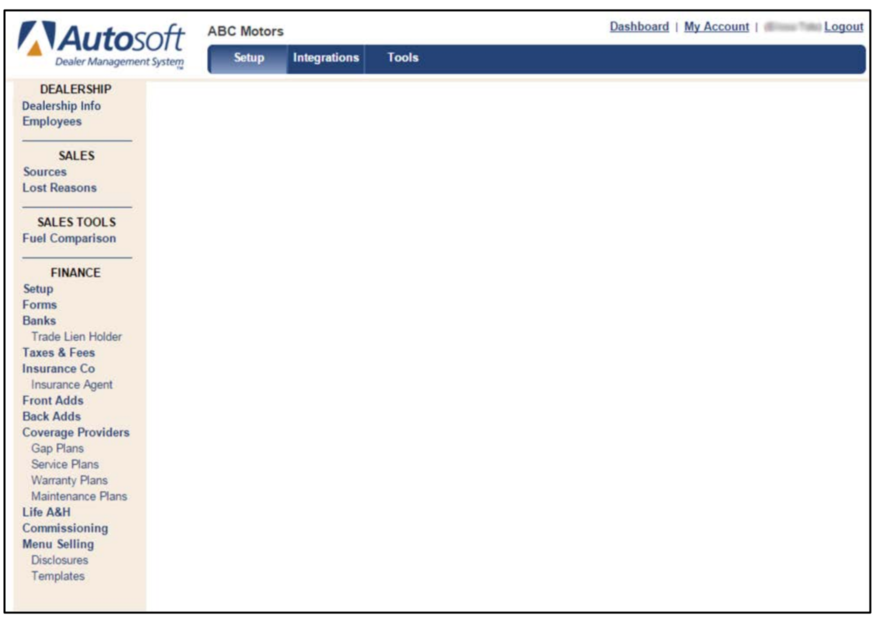
Before you begin using the program, you must enter setup information. This information customizes the program for your dealership and determines several pieces of default information (charges, tax information, commission information, etc.) that fill in automatically when you create a new deal. These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

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

Accessing the Setup

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

2. The **Setup** menu opens.

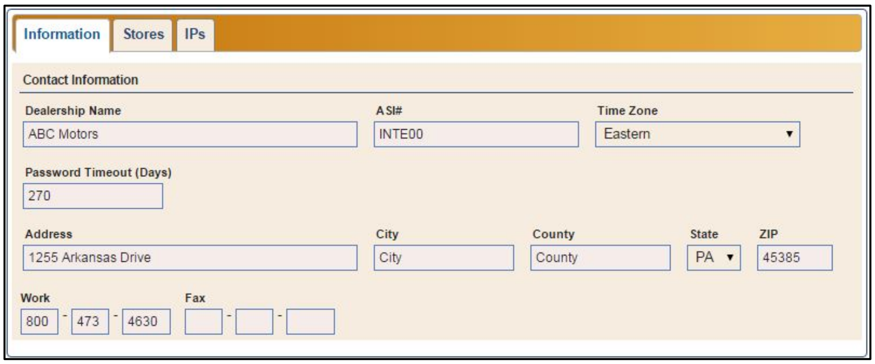


Adding Dealership Setup Information

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

Dealership Info

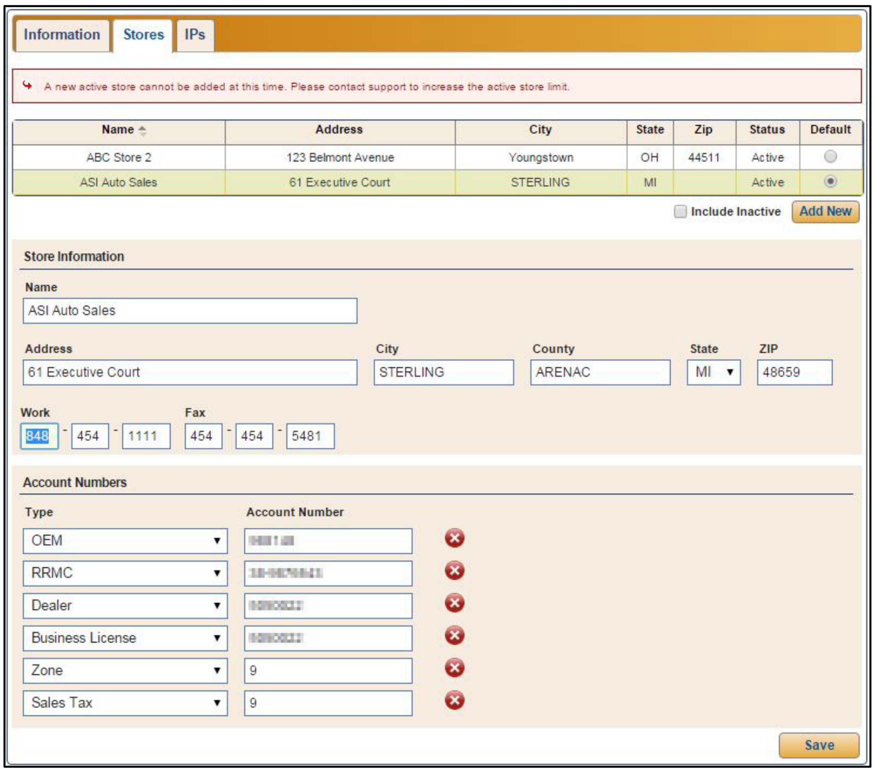
The **Dealership Info** link in the left navigation panel of FLEX DMS F&I's Setup section gives you access to your dealership's address and telephone numbers and store/location details. After clicking on **Dealership Info**, a box will open, displaying the dealership's contact information under the **Information**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



Stores

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

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



Adding Stores

1. Click **Add New**.

3. Type the **Name**, **Address**, and **Work Phone** and **Fax** numbers for the store you are adding.

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

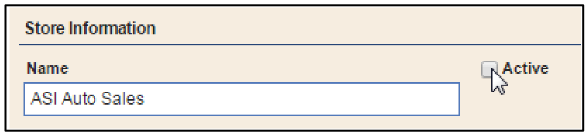
5. The store will appear in the Stores list. The store added by Autosoft is the default store. Click the button in the **Default** column in the row of the store you wish to set as the default store.

Making a Store Inactive

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

1. Select the store.

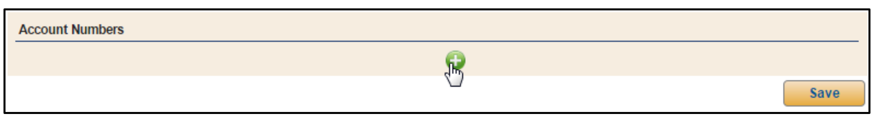
2. Click to clear the **Active** field.



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

Adding and Removing Accounts

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



2. Use the **Type** list to select the account number you are adding: **Business License**, **Dealer**, **OEM**, **RRMC**, **Sales Tax**, or **Zone**.

3. Type the account number in the **Account Number** field.

4. Click the red **x** button next to an account number to remove the account number.

5. When you are finished adding or removing dealership account information, click **Save**. A green "Success" message verifies the information has been saved.

IPs

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

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

Adding an IP Address

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

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

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

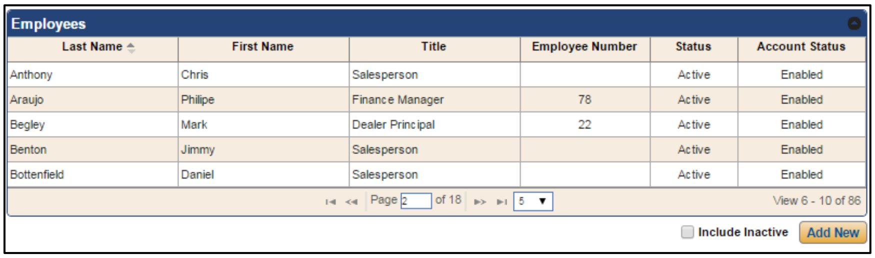
Removing an IP Address

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

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

Employees

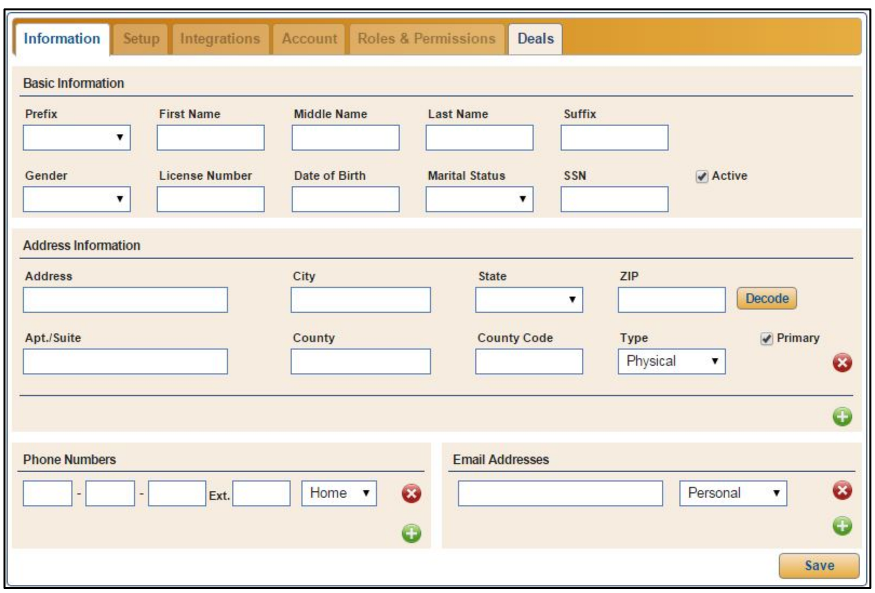
The Employees setup is where you will add users. Every employee who needs to use FLEX DMS F&I must be added to the setup. This is also where you will create the username and password each user will use to log on to the program. You also will control access rights here.



Last Name	First Name	Title	Employee Number	Status	Account Status
Anthony	Chris	Salesperson		Active	Enabled
Araujo	Philipe	Finance Manager	78	Active	Enabled
Begley	Mark	Dealer Principal	22	Active	Enabled
Benton	Jimmy	Salesperson		Active	Enabled
Bottenfield	Daniel	Salesperson		Active	Enabled

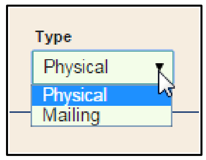
Adding an Employee

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

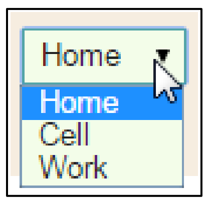


4. Under **Address Information**, type the address, and use the **Type** list to designate the address as either a physical or mailing address. You can add both a physical address and a mailing address. The address is optional, but if you choose to add address information for the employee, the **State** field is required. You can eliminate some keystrokes by entering the zip code for the employee's address into the **ZIP** field, which will decode the zip code and auto-populate the city and state. If you mistyped the zip code and the city and state do not appear as they should, correct the zip code and click **Decode**.

5. To add another address for the employee, click the green **+** button and repeat the process. If you list multiple addresses for an employee, be sure to click the **Primary** box for the address you wish to use principally.



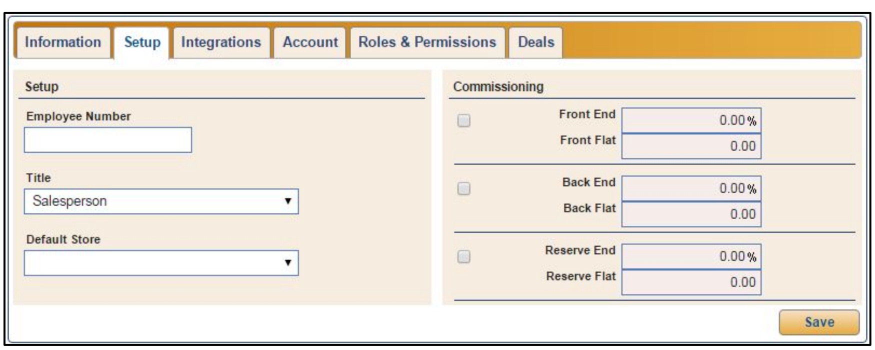
6. Use the **Phone Numbers** section to enter the employee's phone numbers. The **Type** defaults to **Home**. Select a different option from the drop-down menu as needed. You can add up to three phone numbers for the employee: **Home**, **Cell**, and **Work**. Click the green **+** button to add additional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



7. Enter an e-mail address in the **Email Addresses** section. The **Type** defaults to **Personal**. Select a different option as needed. You can add two e-mail addresses for the employee: **Personal** and **Work**. To add an additional email address, click the green **+** button.

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

9. Click the **Setup** tab.



10. In the **Setup** section on this tab, type the individual's employee number, and use the **Title** list to select the employee's job title. If your dealership has multiple stores/locations, select the employee's primary location from the **Default Store** list.

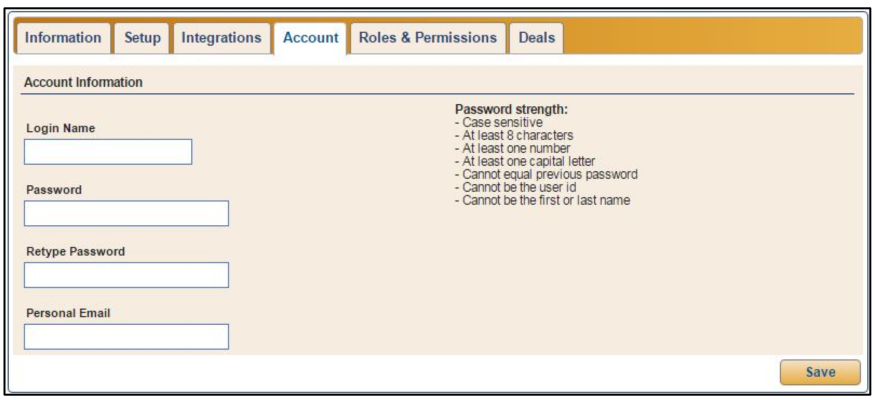
11. In the **Commissioning** section, type the employee's commission information. You only need to add commission information here if it varies for this employee. Otherwise, the program will use the universal commissioning information you enter under the Commissioning setup.

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

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

14. Click **Save**. A green "Success" message verifies the information has been saved.

15. Click the **Account** tab.

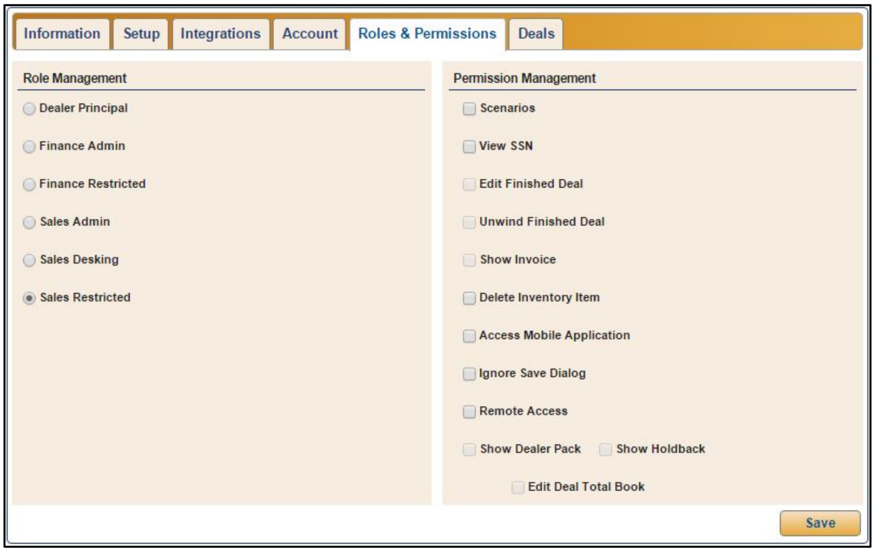


16. In the **Account Information** section, type the login name and password for this employee. The employee will use this information to log in to FLEX DMS F&I. Note that the password must meet the criteria listed on the screen.

17. Enter an e-mail address for the employee in the **Personal Email** field.

18. Click **Save**. A green "Success" message verifies the information has been saved.

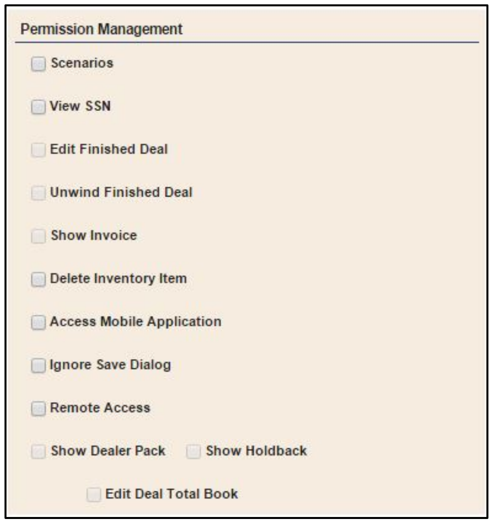
19. Click the **Roles & Permissions** tab.



20. In the **Role Management** section, click to select the role that identifies the access level for this employee. This determines the features the employee can access within the program.

- **Dealer Principal:** This grants full access to the program, including the ability to access the Employees section of the Admin area, thereby allowing the role to control user accounts.
- **Finance Admin:** This grants full access to the program; however, Admin rights exclude those associated with the Employees section of the Admin area.
- **Finance Restricted:** This grants full access to all sales and finance information in deals but restricts access to setup.
- **Sales Admin:** This grants access to all sales information but restricts access to finance.
- **Sales Desking:** This grants access to both the basic sales information and the Desking screen.
- **Sales Restricted:** This grants access to basic sales information only.

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



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

- **Show Dealer Pack:** This allows the user to view the amount of overhead being deducted from the gross profit on the deal prior to calculating the sales person's commission.
- **Show Holdback:** This allows the employee to view the holdback paid to the dealer by the manufacturer for the vehicle's sale.
- **Edit Deal Total Book:** This allows the employee to edit the total book cost on the deal.

22. Click **Save**. A green "Success" message verifies the information has been saved.

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

Viewing Employee Information

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

Editing Employee Information

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

Making a User Inactive

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

1. Select the employee.

2. Click to clear the **Active** field.

3. Click **Save** to save the information. A green “Success” message verifies the information has been saved.

Disabling Employees

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

1. Select the employee.

2. Click the **Account** tab.

3. Click **Disable User**.

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

Restoring Employees

Only users with administrative rights can restore users. This returns the employee’s account to an Enabled status, and the employee can log into FLEX DMS F&I.

1. Select the employee.

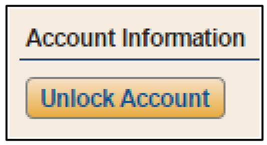
2. Click the **Account** tab.

3. Click **Restore User**.

Locking Accounts

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

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



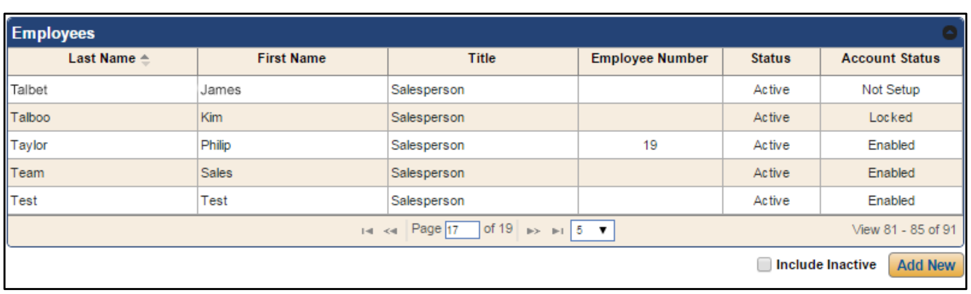
Unlocking Accounts

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

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

Understanding the Account Status

The **Account Status** column displays the account status. This simply identifies which accounts are locked (due to log on errors, inactivity, or manual locking), unlocked, not setup, enabled, and disabled.



Employees

Last Name	First Name	Title	Employee Number	Status	Account Status
Talbet	James	Salesperson		Active	Not Setup
Talboo	Kim	Salesperson		Active	Locked
Taylor	Philip	Salesperson	19	Active	Enabled
Team	Sales	Salesperson		Active	Enabled
Test	Test	Salesperson		Active	Enabled

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Include Inactive Add New

Integrations Tab

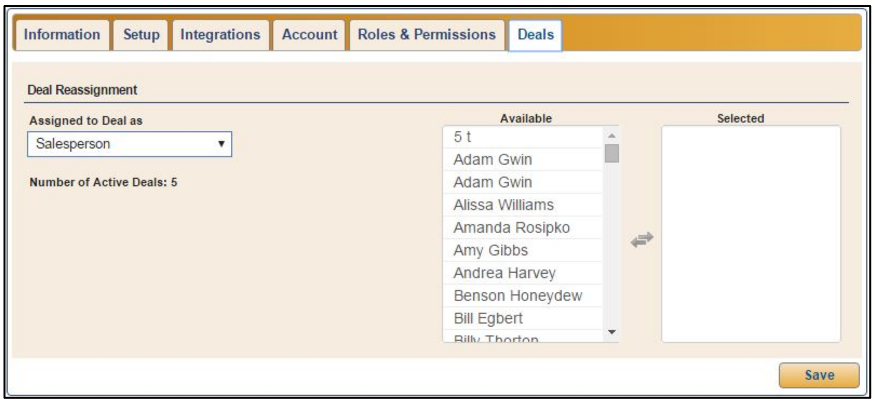
The Integrations tab is where the employee's Autosoft-assigned employee number will be displayed, along with usernames for any third-party integrations to which the employee has access.

Deals Tab

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

1. Select the employee from the list of employees.

2. Click on the **Deals** tab.

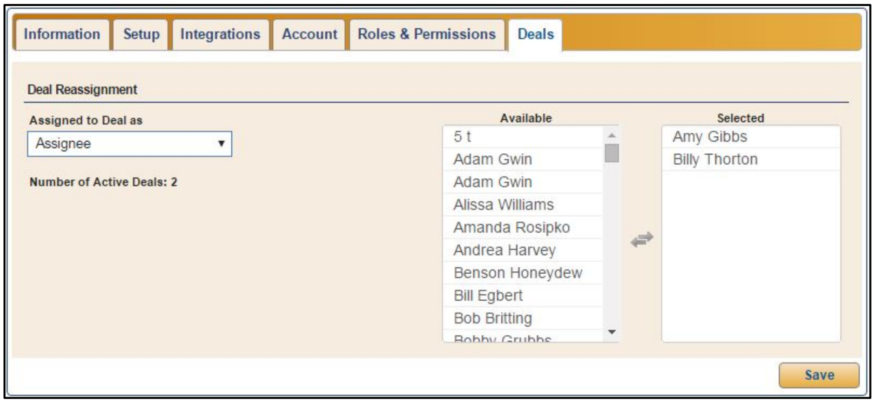


3. Use the **Assigned to Deal as** drop-down menu to select the role under which the employee was assigned to the active deals you would like to reassign. The number of active deals assigned to the employee under the selected role will be displayed below the field.

4. Depending on whether you choose Salesperson, Sales Manager, Finance Manager, or Assignee, the **Available** box will be populated with a list of available employees matching that role to whom the selected employee's deals can be transferred. Click on an employee to whom you would like to assign one or more of the current employee's deals.

5. The name you clicked on will be moved to the **Selected** box.

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



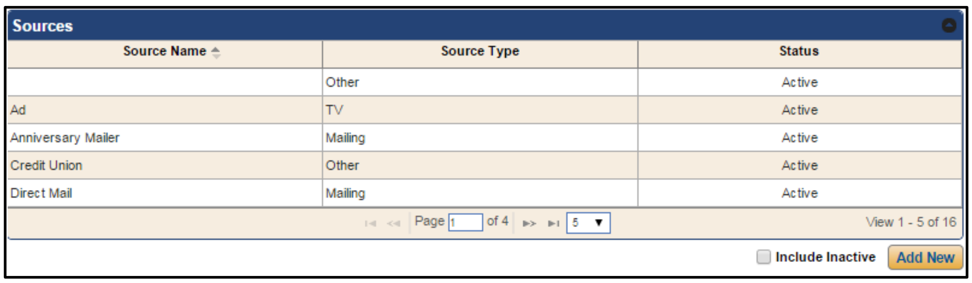
7. Click **Save** to reassign the active deals. A green "Success" message verifies the action was successful.

Adding Sales Information

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

Sources

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


Sources

Source Name	Source Type	Status
	Other	Active
Ad	TV	Active
Anniversary Mailer	Mailing	Active
Credit Union	Other	Active
Direct Mail	Mailing	Active

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Include Inactive Add New

Adding Sources

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

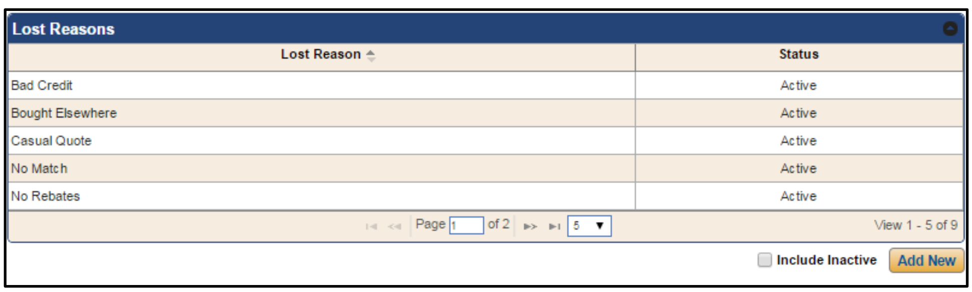
Removing Sources

You cannot delete sources once you create them. You can, however, flag the source as inactive so it no longer appears in the source list when selecting sources for customers. The source will also not display in the Source list in the Setup unless you choose to include inactive items by clicking the **Include Inactive** box when viewing the list.

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

Lost Reasons

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



Adding Lost Reasons

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

Removing Lost Reasons

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

1. Click **Lost Reasons** from the Sales section in the left navigation panel.

2. Click the code in the list.

3. Click to uncheck the **Active** box.

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

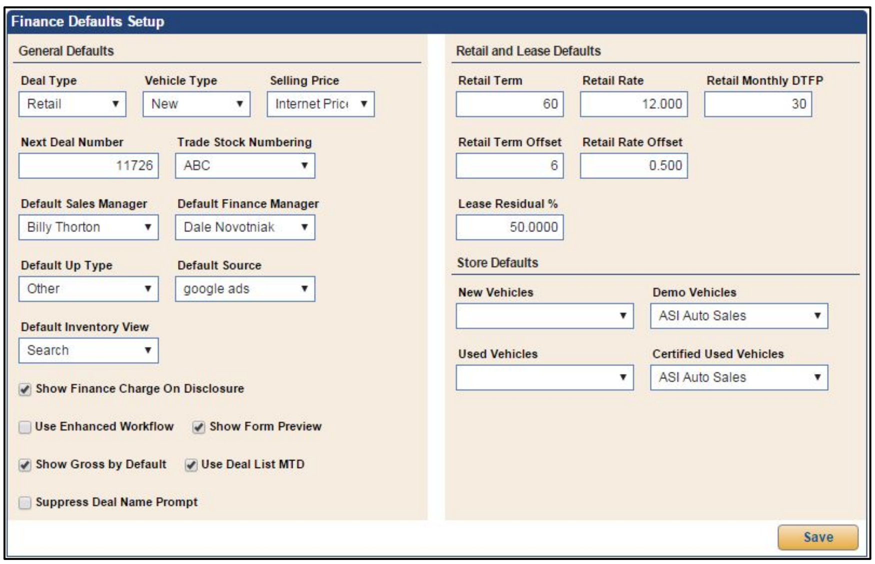
   The code will disappear from the Lost Reason list unless you have the **Include Inactive** box checked.

Adding Finance Setup Information

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

Setup

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



1. Click **Setup** under the Finance header in the left navigation panel. The Finance Defaults Setup screen will open.

2. The **General Defaults** section allows you to set default information that applies to all deals.

   - Use the **Deal Type** menu to select the default deal type: Balloon, Cash, Lease, Retail, or Wholesale.

   - Use the **Vehicle Type** menu to select the default vehicle type: New or Used.

   - Use the **Selling Price** menu to choose if the selling price is based on the MSRP or Internet Price.

   - In the **Next Deal Number** field, type the deal number you want to use as the starting point. Once you set the starting number, this field will increment as deals are created and will display the next deal number that will be used. The importance of this field is twofold. In addition to serving as a reference for the deal numbers, it allows you to start a new numbering system at the beginning of each year as required by your dealership.

- The **Trade Stock Numbering** menu allows you to determine how stock numbers are assigned to trades. If you select **ABC**, the program will assign a stock number to the trade vehicle that consists of the selling car's stock number with an alpha character suffix (starting with A for Trade 1 in a deal and M for Trade 2 in a deal). If you select **Last Six of VIN**, the program will use the last six characters of the vehicle's VIN as the stock number. If you select **Manual**, you will need to manually assign stock numbers to trade vehicles.

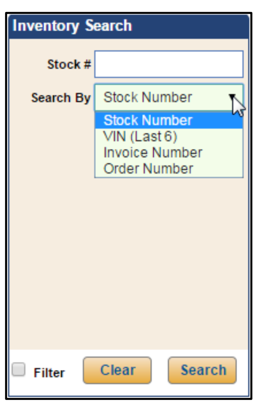
- The **Default Sales Manager** and **Default Finance Manager** menus allow you to set the default Sales Manager and Finance Manager for deals. The selected employees will be added to every deal. These entries can be edited as needed for each deal.

- The **Default Up Type** menu allows you to set a default "up" greeting method. The list includes Internet Up, Other, Phone Up, and Walk-In. While this default will be applied to all deals, you can edit the up type as needed for each deal.

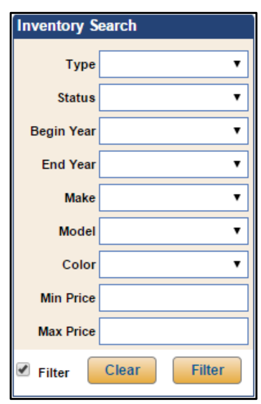
- The **Default Source** menu enables you to set a default source for consumers. The list includes all of the active sources you've entered during your Sources setup. While this default will be applied to all deals, you can edit the up type as needed for each deal.

- The **Default Inventory View** setting determines which inventory search (**Search** or **Filter**) is initially available when you access the vehicle inventory in both the Inventory section of the program and in a deal. Selecting **Search** will default to search options that allow you to search for a vehicle based on stock number, VIN, invoice number, or order number. This default search method is most useful if you have a specific inventory vehicle in mind when searching.

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



Search



Filter

- Click to select the **Show Finance Charge On Disclosure** field to make the finance charges print on the disclosure form. Click to clear this field to prevent the finance charges from printing on the disclosure form.

- The **Use Enhanced Workflow** option determines how the workflow for deals is presented. If you use the enhanced workflow, the options available for the deal are based on the stage of the deal (desk, working, finance, etc.). If you select not to use the enhanced workflow, all deal options are available as soon as you create the desk.

- Click the **Show Form Preview** field to show previews of any deal forms prior to printing them.

- With the **Show Gross by Default** option, you can default the program to display the gross for deals within the **Desking** portion of the **Deals** section for users with desking roles. You can hide the gross as needed on each deal by clicking the **Gross** checkbox on the bottom right corner of the **Desking** main screen. When the **Show Gross by Default** field is not checked in **Setup**, the gross will not be visable automatically in the deal unless you click the unmarked (**Gross**) box in the bottom right corner of the **Desking** main screen.

- Click the **Use Deal List MTD** field to default the deal list available on both the Dashboard section's **Home** tab and the Deals section's main screen to those deals with Start Purchase Dates within the current month. Otherwise, the deal list will be comprised of deals with Start Purchase Dates that precede the current date by up to 30 days.

- Click the **Suppress Deal Name Prompt** checkbox if you would like to assign generic names to deals upon deal creation. If this box is checked, when a new deal is created, the tab will be named "New Deal." Once you assign an applicant to the deal, the name on the deal tab will be changed to the applicant's last name.

3. The **Retail and Lease Defaults** section allows you to set default information for all retail and lease deals in the program. These defaults can be edited as needed for each deal.

    - In **Retail Term**, type the number of months you want to set as the default financing term for retail deals.

    - The **Retail Rate** field allows you to set a default financing rate. Enter the desired rate.

    - In **Retail Monthly DTFP**, type the number of days before the first payment will be due.

    - Use the **Retail Term Offset** and the **Retail Rate Offset** fields to specify the default offset value you want to use.

    - Use the **Lease Residual %** field to specify the default residual for lease deals.

4. If you have multiple stores set in the system, use the **Store Defaults** section to select the default store that should be used for the vehicle types listed (**New**, **Demo**, **Used**, and **Certified Used Vehicles**).

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

Forms

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

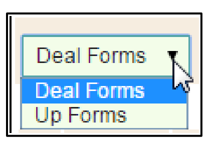

Deal Forms ▾

Rank	Copies	Display Name	Assigned Name	Form Number	Revision Date
1	1	MAPFRE Life Insurance Sc	MAPFRE Life Insurance Schedule LASER	AC2423CB-0386	09/01/06
2	2	Purchase Order	Purchase Order		08/02/13
3	1	Test 22	Test 22	22	02/02/02
4	1	Ford ATPI Laser	Ford ATPI Laser	FC-FL-PR 18206	12/01/05
5	1	Fort Knox FCU Buyers Sum	Fort Knox FCU Buyers Summary Laser		01/01/00
6	1	Purchase Order	Purchase Order	VBO-98190	01/01/98
7	1	Bobilya Buyers Order	Bobilya Buyers Order		06/18/14
8	1	Mitch Test 1	Mitch Test 1	1	01/01/01
9	1	First Commonwealth Bank	First Commonwealth Bank Retail	PA 123DC-SLC	12/01/14
10	1	Ally SmartLease Agreemer	Ally SmartLease Agreement	AF-671-FL	08/01/12
11	1	Generic Purchase Order - L	Generic Purchase Order - Laser		01/01/00
12	2	Ford ESP	Ford ESP National VSC App	ESP 8240-Nat App-Provs	10/01/13
13	1	Bankers Systems SI Retail	Bankers Systems SI Retail	RS-SI-MV-OH	09/10/12
14	1	Agreement to Provide Insu	Agreement to Provide Insurance - Notice to Customer - Laser		01/01/00
15	1	IRS Report of Cash Payme	IRS Report of Cash Payments - Laser	8300	07/01/12
16	1	LAW 553 Retail Installment	LAW 553 Retail Installment Contract	LAW 553	04/01/14

Organizing Forms

1. Click **Forms** under the Finance heading in the left navigation panel.

2. Choose the category of form you would like to work with using the drop-down menu at the top of the screen.



3. The list of forms in that category appears.

4. To change a form's ranking within the list, click on the **Rank** field for that form and type the rank within the list at which you'd like the form to appear.

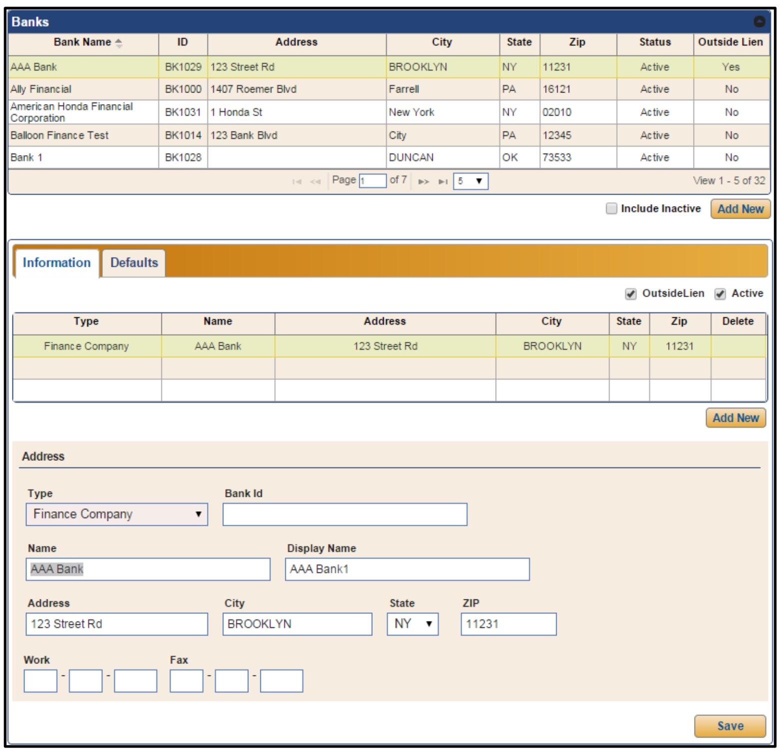
5. Use the **Copies** field to determine the default number of copies (from 1 to 9) the program will print for each form. Either use the up and down arrows to arrive at the desired number of copies for an individual form or type the desired default number of copies in the **Copies** field.

6. While each form has an assigned name, you can create a display name that differs from the assigned name and will appear when the form is referenced in the program. The **Display Name** field defaults to the assigned name. Click on the **Display Name** field and type the name by which you'd like the form to be referenced in FLEX DMS F&I.

7. When you have finished making changes to a form's ranking, copy count, and/or display name, click **Save**. The form will appear in the list at the rank you entered, moving the form that previously held that rank to the rank immediately after the moved form.

Banks

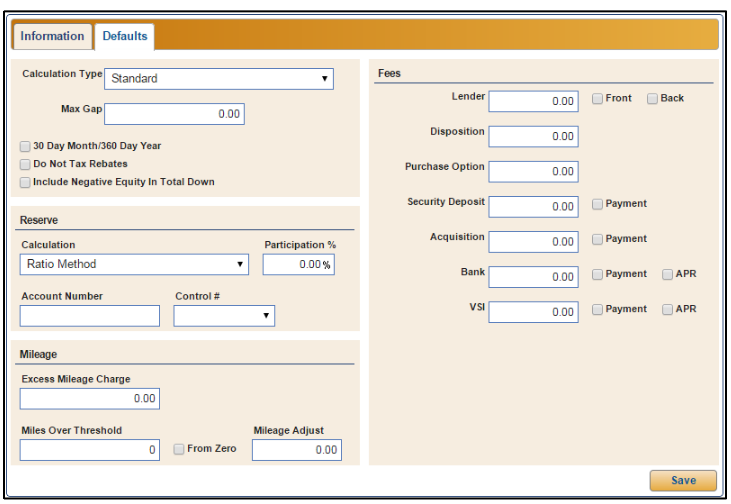
When you add a new bank to the Setup, you must first add the information for the finance company. Then, you can specify the defaults for the finance company that will be used to make calculations when you select to apply this bank to a deal. Once you add the finance company, you can add the lien holder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



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

Adding Banks

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



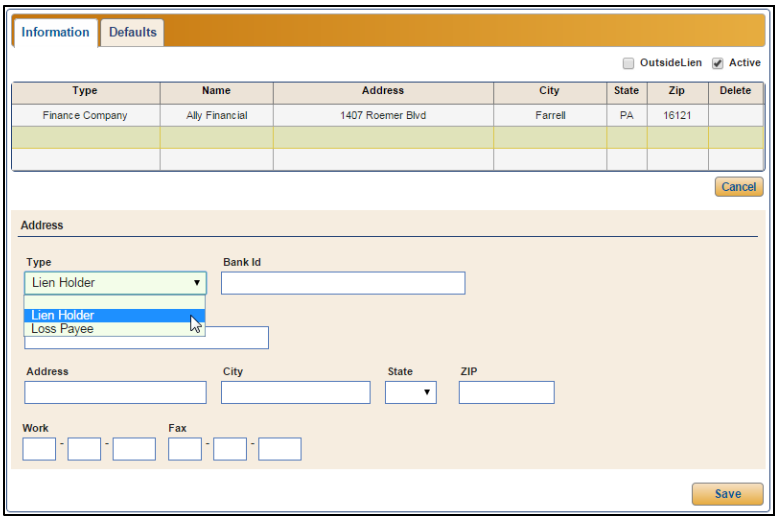
13. Click **Save** to save the information. A green “Success” message verifies the information has been saved.

Adding a Lien Holder or Loss Payee

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

1. Once the finance company appears in the secondary table under the **Information** tab, click **Add New** under the table.

2. In **Type**, select if this is a Lien Holder or Loss Payee for the bank. As you add addresses to the bank, the list will only display the remaining options.



3. Type the name associated with this branch of the bank.

4. Complete the address and phone fields as needed.

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

6. The **Default** tab is now available. Enter the information as needed.

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

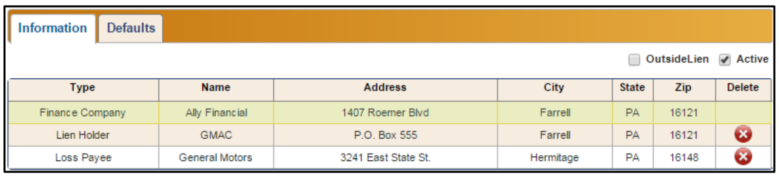
Removing a Bank

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

1. Click **Banks** under the Finance heading in the left navigation panel.

2. In the Banks list, click on the bank you wish to make inactive.

3. Click to clear the **Active** checkbox at the top of the **Information** tab.



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

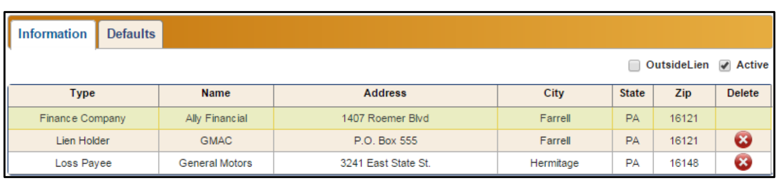
Removing a Bank’s Lien Holder or Loss Payee

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

1. Click **Banks** under the Finance heading in the left navigation panel.

2. In the Banks list, click on the bank for which you wish to delete the lien holder or loss payee.

3. In the list inside the **Information** tab, the lien holder and loss payee each have a red **X** button in the **Delete** column. Click the red **X** button to delete the entry.

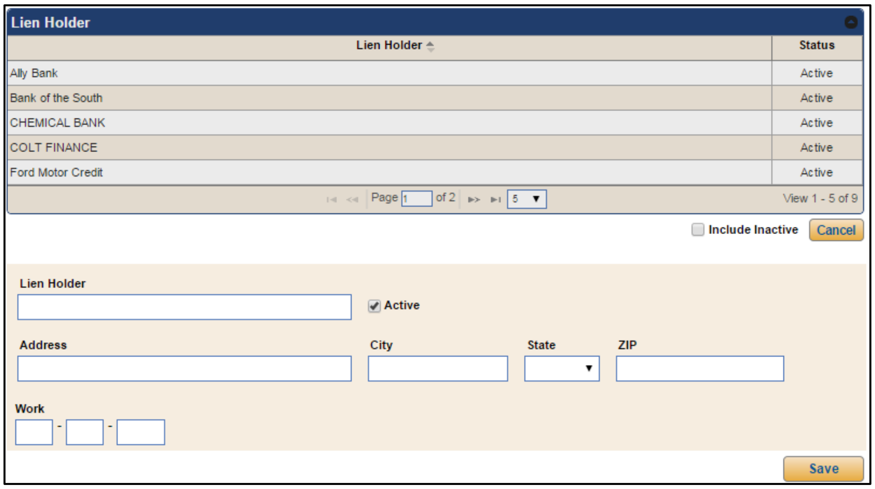


4. The program prompts you that this action will permanently delete the bank company. Click **Continue** to acknowledge the message and to delete the bank.

5. Click **Save** to save the information. A green “Success” message verifies the information has been saved.

Trade Lien Holder

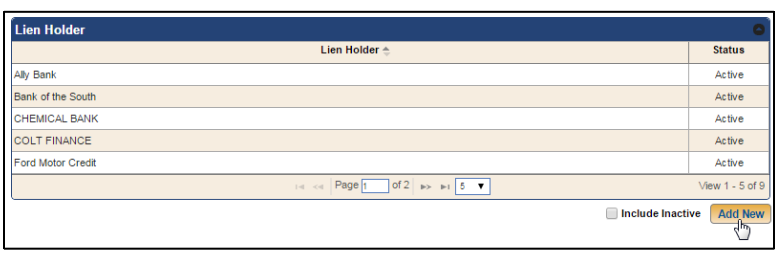
The **Lien Holder** option allows you to create a list of lien holders. In the event there is still a lien on a trade vehicle involved in a deal, you can select the appropriate lien holder. This ensures there is a record of whom the dealership needs to pay in order to obtain the title for the vehicle.



Adding a Trade Lien Holder

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

2. Click **Add New**.



3. In the **Lien Holder** field, type the lien holder's name.

4. The address is optional, but if you select to add address information for the bank, the **State** field is required.

5. In the **Work** field, type the lien holder's phone number.

6. The **Active** field is automatically selected. You should leave this setting for new lien holders.

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

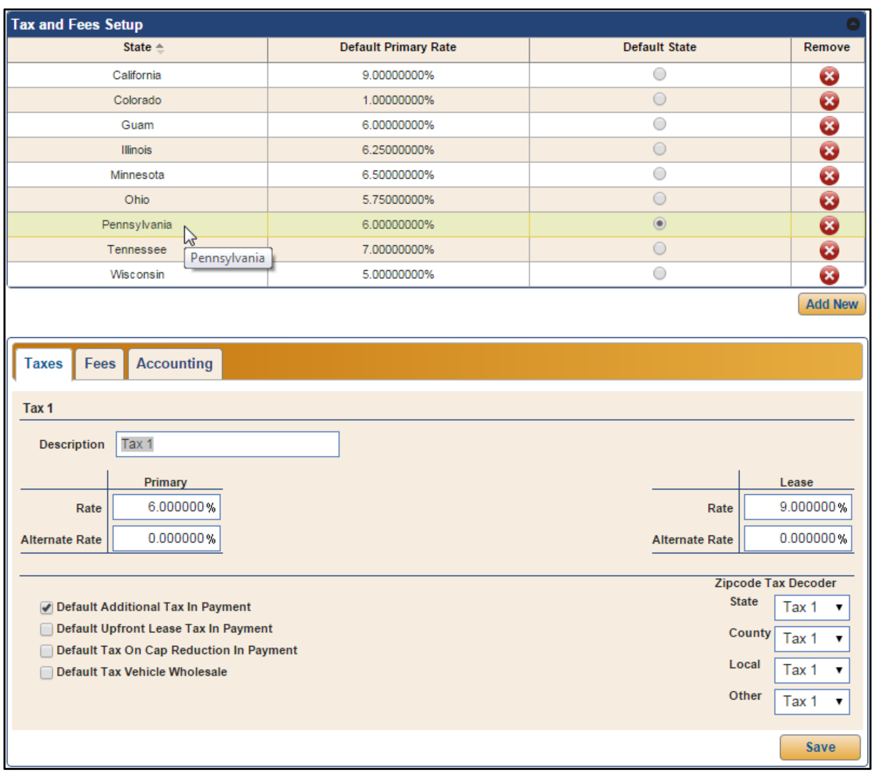
Removing Trade Lien Holders

You cannot delete lien holders once you've created them. You can, however, flag a lien holder as inactive so it no longer appears in the lien holder list. The inactive lien holder will not display in the Lien Holder list in the Setup unless you select to include inactive items by clicking the **Include Inactive** box when viewing the list.

1. Click **Trade Lien Holder** under the Finance header in the left navigation panel.
2. In the Lien Holder list, click on the lien holder you wish to make inactive.
3. Click to clear the **Active** field.
4. Click **Save** to save the information. A green "Success" message verifies the information has been saved.

Taxes & Fees

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



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

Adding States

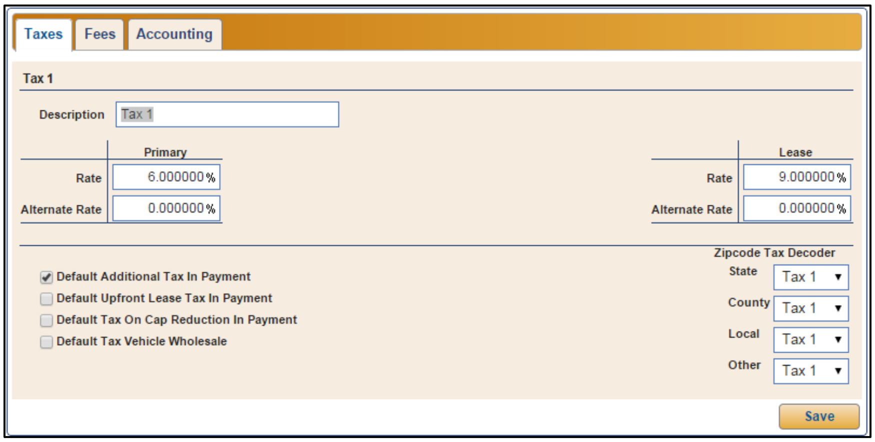
1. Click **Taxes & Fees** under the Finance heading in the left navigation panel.

2. Click **Add New**.

3. The Add State window opens containing a list of states that have not been added to your FLES DMS F&I. Click on the state you wish to add. To add multiple states at once, hold the CTRL button on your keyboard and click on all the states you'd like to add using the left mouse button.

4. Click **Add State**.

5. A box will open below the Tax and Fees Setup table. The **Taxes** tab within that box displays the taxing the state uses. Each state will use different taxes, so the fields displayed on this tab may vary from the image below. You can type a description for each tax if desired.



6. Click to select the **Default Additional Tax In Payment** box to include the tax in the payment.

7. Click to select the **Default Upfront Lease Tax In Payment** to include this tax in the payment.

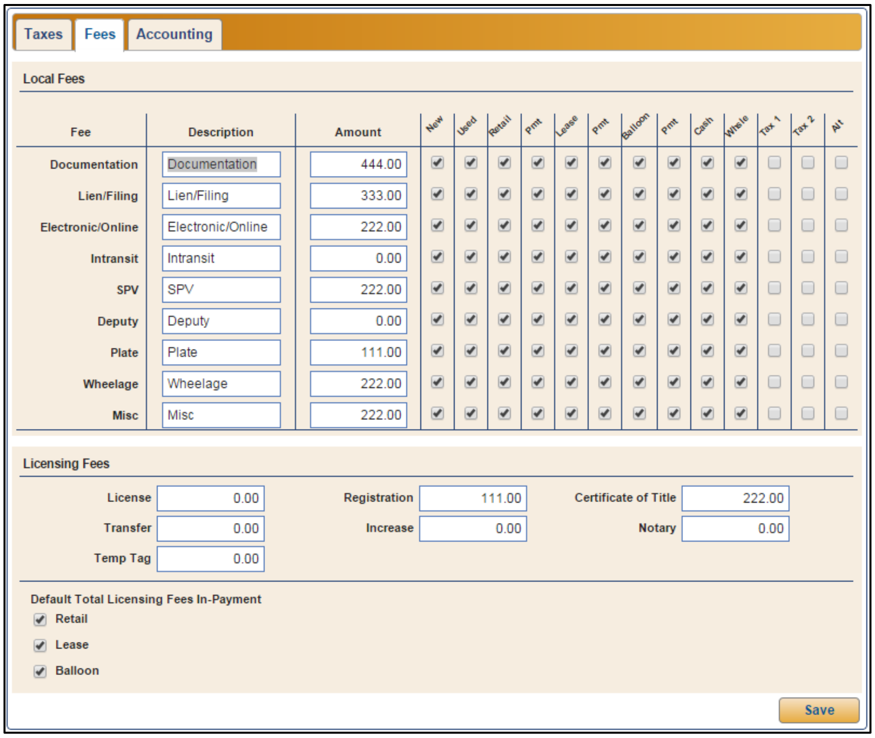
8. Click to select the **Default Tax On Cap Reduction In Payment** to include this amount in the payment.

9. Click to select the **Default Tax Vehicle Wholesale** if the state taxes wholesale sales.

10. If the state has multiple taxes, use the **ZIP Code Tax Decoder State**, **County**, **Local**, and **Other** lists to specify the rate that should be used for each tax. The program will automatically assign the state and states taxes to a deal based on the applicant's ZIP code.

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

12. Click the **Fees** tab. The **Fees** tab displays the fees the state charges. Again, each state charges different fees, so the fields displayed on this tab may vary from the screen shot below.



13. In the **Local Fees** section, enter the fees and amounts charged by the state.

14. Click to select the deal types that require the fee and specify if the fee should be added to the payment.

15. Click to select the taxes that apply to the fee.

16. In the **Licensing Fees** section, enter any licensing fees that apply.

17. In the **Default Total Licensing Fees In-Payment** section, click to select the deal types that require the licensing fees to be included in the payment.

18. Click **Save** to save the information. A green “Success” message verifies the information has been saved.

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

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

Removing a State

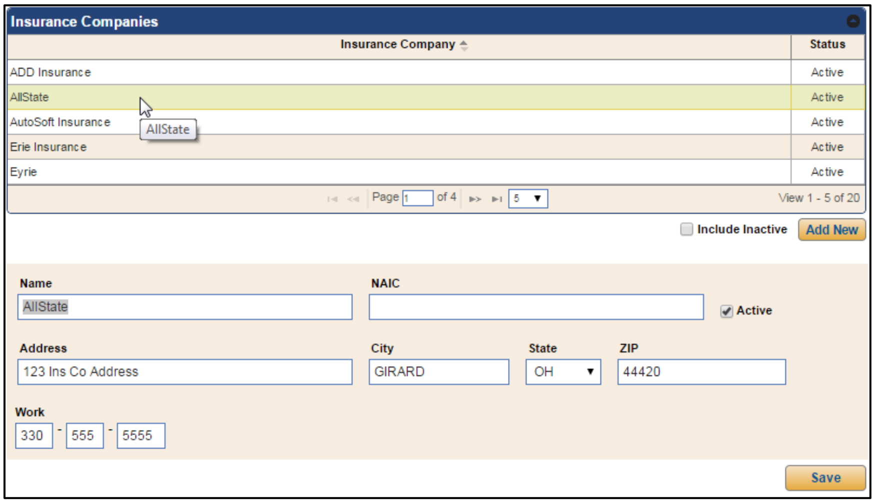
1. Click **Taxes & Fees** under the Finance heading in the left navigation panel.

2. Click the red **X** button in the **Remove** column for the state you wish to delete.

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

Insurance Companies

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



Adding Insurance Companies

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

Removing an Insurance Company

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

1. Click **Insurance Co** under the Finance header in the left navigation panel.

2. Click the company you wish to make inactive from the Insurance Companies list.

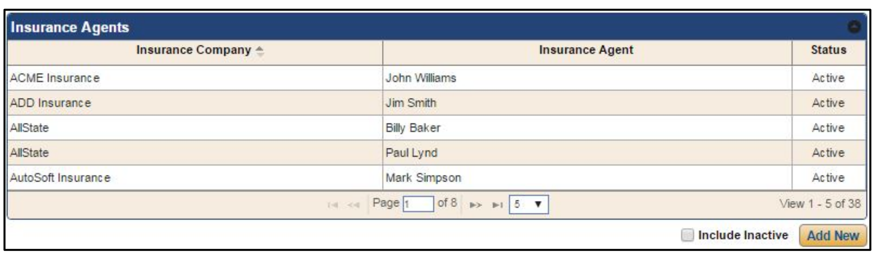
3. Click to clear the **Active** field.

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

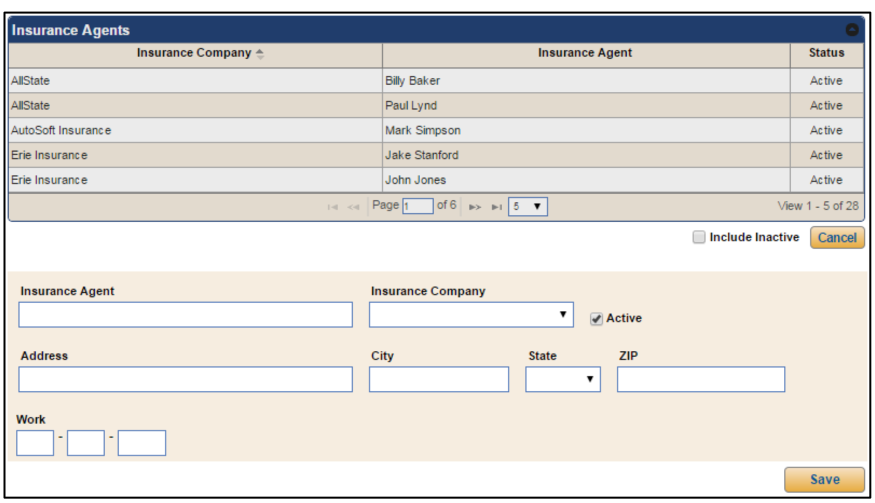
Adding Insurance Agents

1. Click **Insurance Agent** under the Finance header in the left navigation panel.

2. Click **Add New**.



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



4. Use the **Insurance Company** drop-down menu to select the company for which this agent works. The list includes all the insurance companies you added during Setup. This is a required entry.

5. The **Active** field is automatically selected. You should leave this setting for new agents.

6. The remaining information is optional. However, if you add an address, the **State** field is required.

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

Removing an Agent

Once you have added an insurance agent to the Setup, you cannot delete the agent. You can, however, flag the insurance agent as inactive so he or she no longer appears in the Insurance Agent list. The insurance agent will also not display in the Insurance Agents list in the Setup unless you select to include inactive items by clicking the **Include Inactive** box when viewing the list.

1. Click **Insurance Agent** under the Finance header in the left navigation panel.

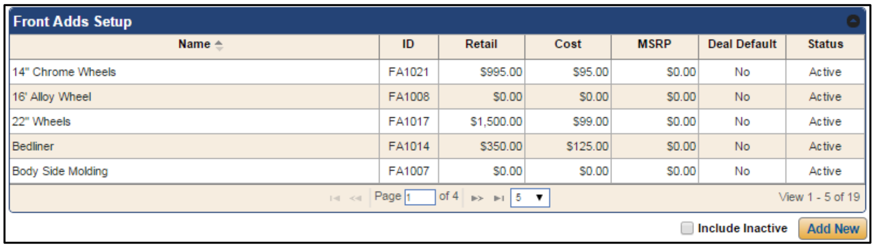
2. Select the agent from the list.

3. Click to clear the **Active** field.

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

Front Adds

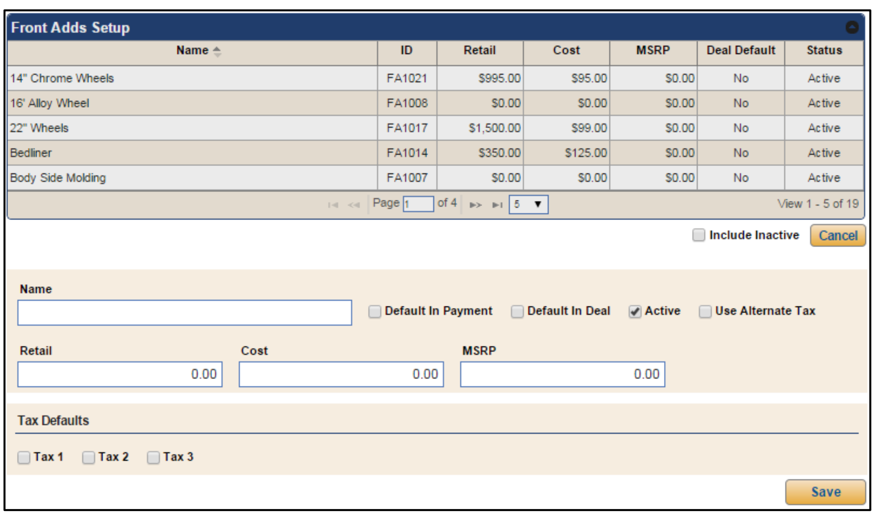
This is where you enter the front adds you will apply to deals. You can enter an unlimited number of front adds.



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

Adding a New Item

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



3. Type a name/description for the item in the **Name** field.
4. Click **Default in Payment** if this item should be added to the payment.
5. Click the **Default In Deal** checkbox to automatically add this item to new deals.
6. The **Active** field is automatically selected. You should leave this setting for new adds.

7. The **Use Alternate Tax** field allows you to apply the alternate tax rate to the front add. If you select this option, instead of the standard tax rate, the alternate tax rate set for the taxing state will be used to calculate the tax for the front add.

8. Next, specify the **Retail** price, **Cost**, and **MSRP** for the item.

9. Use the **Tax Defaults** section to specify the taxing that applies to this item.

10. Click **Save** to save the information. A green “Success” message will verify the information has been saved.

Removing Items

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

1. Click **Front Adds** in the left navigation panel.

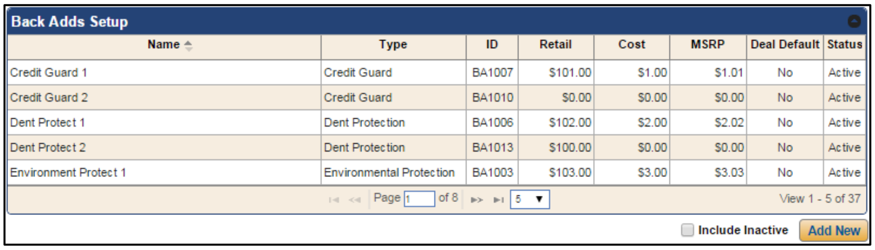
2. Select the item from the Front Adds list.

3. Click to clear the **Active** field.

4. Click **Save** to save the information. A green “Success” message will verify the information has been saved.

Back Adds

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

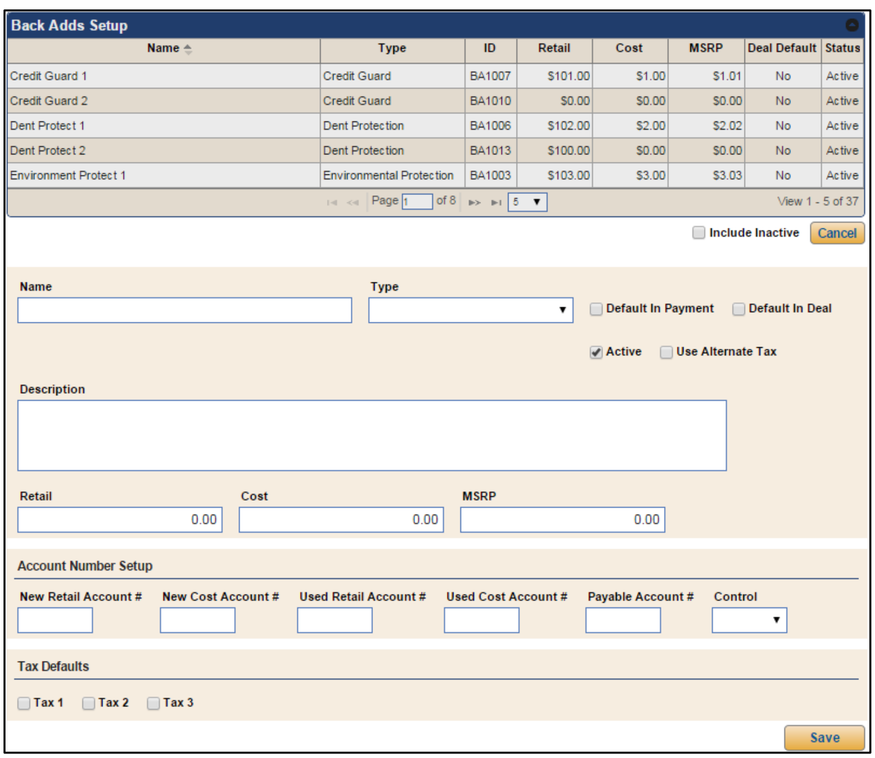


Name	Type	ID	Retail	Cost	MSRP	Deal Default	Status
Credit Guard 1	Credit Guard	BA1007	$101.00	$1.00	$1.01	No	Active
Credit Guard 2	Credit Guard	BA1010	$0.00	$0.00	$0.00	No	Active
Dent Protect 1	Dent Protection	BA1006	$102.00	$2.00	$2.02	No	Active
Dent Protect 2	Dent Protection	BA1013	$100.00	$0.00	$0.00	No	Active
Environment Protect 1	Environmental Protection	BA1003	$103.00	$3.00	$3.03	No	Active

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

Adding a New Item

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



Name	Type	ID	Retail	Cost	MSRP	Deal Default	Status
Credit Guard 1	Credit Guard	BA1007	$101.00	$1.00	$1.01	No	Active
Credit Guard 2	Credit Guard	BA1010	$0.00	$0.00	$0.00	No	Active
Dent Protect 1	Dent Protection	BA1006	$102.00	$2.00	$2.02	No	Active
Dent Protect 2	Dent Protection	BA1013	$100.00	$0.00	$0.00	No	Active
Environment Protect 1	Environmental Protection	BA1003	$103.00	$3.00	$3.03	No	Active

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

4. Use the **Type** list to select a type/category for the item.

5. Click **Default in Payment** if this item should be added to the payment.

6. Click the **Default In Deal** checkbox to automatically add this item to new deals.

7. The **Active** field is automatically selected. You should leave this setting for new back adds.

8. The **Use Alternate Tax** field allows you to apply the alternate tax rate to the back add. If you select this option, instead of the standard tax rate, the alternate tax rate set for the taxing state will be used to calculate the tax for the back add.

9. Use the **Description** field to provide an explanation for the back add.

10. Specify the **Retail** price, **Cost**, and **MSRP** for the item.

11. The **Account Number Setup** section allows you to specify the general ledger account numbers used to post this item to the books in the Autosoft FLEX DMS Accounting module. If you specify the account numbers here, the item will automatically post to the specified accounts using the selected control.

12. Use the **Tax Defaults** section to specify the taxing that applies to this item.

13. Click **Save** to save the information. A green “Success” message will verify the information has been saved.

Removing Items

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

1. Click **Back Adds** in the left navigation panel.

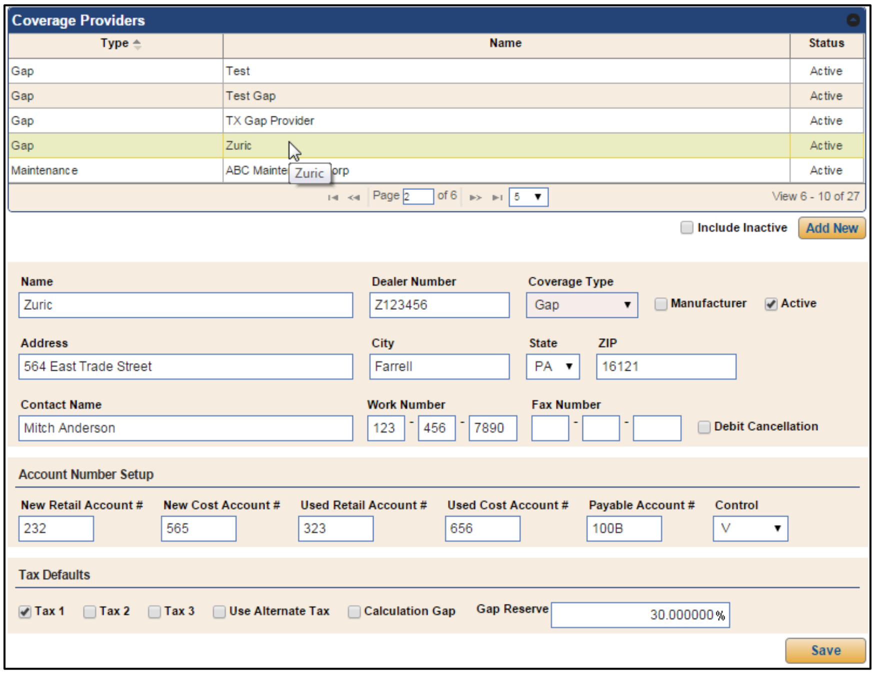
2. Select the item from the Back Adds list.

3. Click to clear the **Active** field.

4. Click **Save** to save the information. A green “Success” message will verify the information has been saved.

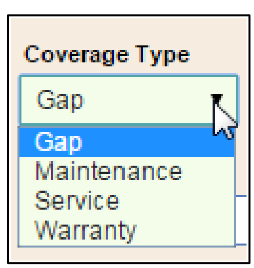
Coverage Providers

Coverage providers are the vendors who provide the services you sell to customers during the deal. Once you add coverage providers to the Setup, you can then add the Gap, service, warranty, and maintenance plans the providers offer.



Adding Providers

1. Click **Coverage Providers** under the Finance header in the left navigation panel.
2. Click **Add New**. Fields display on the bottom of the screen.
3. Enter the provider's name in the **Name** field. This is a required entry.
4. Type the provider's dealer number.
5. Use the **Coverage Type** list to select the type of coverage this provider offers. This is a required entry.



6. If this is a manufacturer coverage provider, click to select the **Manufacturer** box.

7. The **Active** field is automatically selected. Leave this setting for new providers.

8. The remaining information in this section is optional. However, if you add an address, the **State** is required.

9. The **Account Number Setup** section allows you to specify the general ledger account numbers used to post services to the books in the Autosoft FLEX DMS Accounting module. If you specify the account numbers here, the item will automatically post to the specified accounts using the selected control.

10. Use the **Tax Defaults** section to specify the taxing that applies to this item. (The **Calculation Gap** and **Gap Reserve** fields apply to Texas only.)

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

Removing Providers

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

1. Click **Coverage Providers** from the left navigation panel.

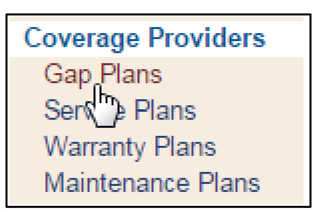
2. Select the provider from the Coverage Providers list.

3. Click to clear the **Active** field.

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

Adding Plans

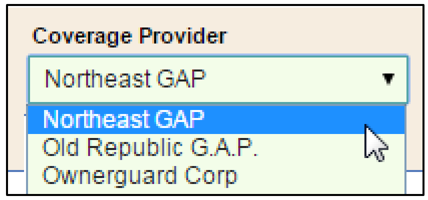
1. From the list of plans under the **Coverage Providers** link in the left navigation panel, click the plan type you wish to add.



2. Click **Add New** under the plans list that opens. Fields display on the bottom of the screen. The fields that display vary based on the type of plan you are adding.

3. Type the **Plan Name**.

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



5. The **Active** field is automatically selected. Leave this setting for new plans.
6. Click the **Default In Deal** checkbox to automatically add the plan to new deals.
7. Type a description for the plan in the **Description** field.
8. Use the **Retail** field to enter the coverage plan's retail price to be applied to the deal.
9. Enter the cost of the coverage plan in the **Cost** field.
10. Click **Save** to save the information. A green "Success" message will verify the information has been saved.

Tip: Each GAP, service, warranty, and maintenance plan will be assigned a system-generated ID number that will display in the **ID** field in the corresponding plan list. This object ID is used as a unique identifier for the item for third-party integrations. To ensure that these IDs are entered correctly in third-party integrations, export a complete list of the IDs using the Export Sequence Numbers utility. *(See Appendix G Export Sequence Numbers Utility.)*

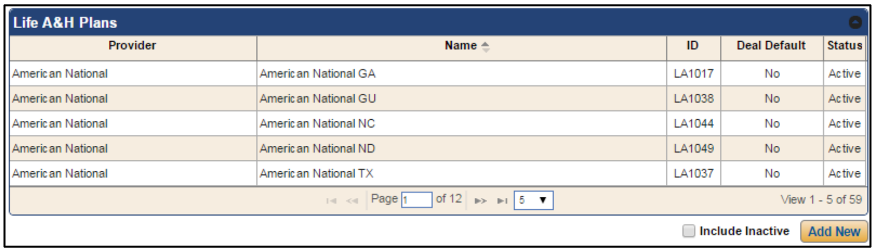
Removing Plans

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

1. Click the plan type in the left navigation panel.
2. Select the plan from the list of plans of that type.
3. Click to clear the plan's **Active** field.
4. Click **Save** to save the information. A green "Success" message will verify the information has been saved.

Life A&H

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

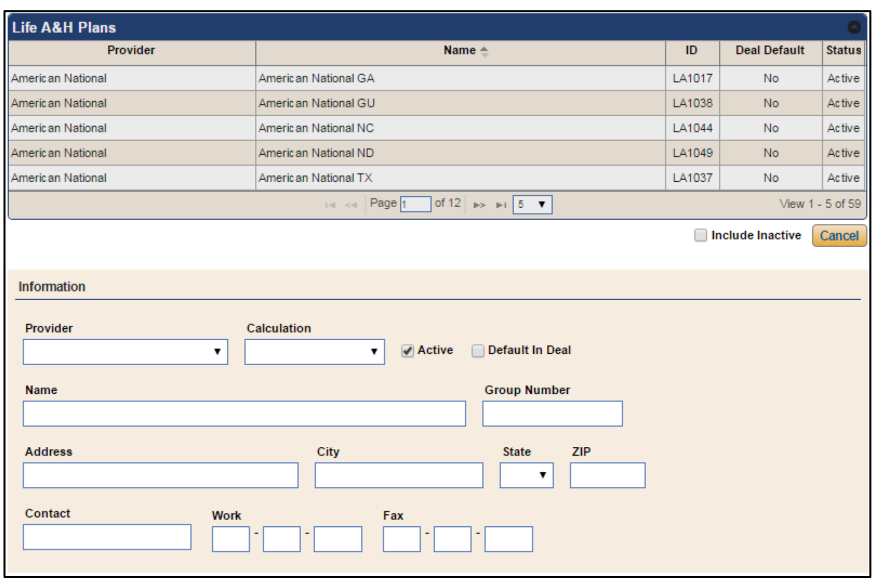


Provider	Name	ID	Deal Default	Status
American National	American National GA	LA1017	No	Active
American National	American National GU	LA1038	No	Active
American National	American National NC	LA1044	No	Active
American National	American National ND	LA1049	No	Active
American National	American National TX	LA1037	No	Active

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

Adding a New Plan

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



Provider	Name	ID	Deal Default	Status
American National	American National GA	LA1017	No	Active
American National	American National GU	LA1038	No	Active
American National	American National NC	LA1044	No	Active
American National	American National ND	LA1049	No	Active
American National	American National TX	LA1037	No	Active

4. Use the **Calculation** list to select the calculation method this provider uses for this plan. This is a required entry. If your calculation is not listed, contact Autosoft.

5. The **Active** field is automatically selected. Leave this setting for new plans.

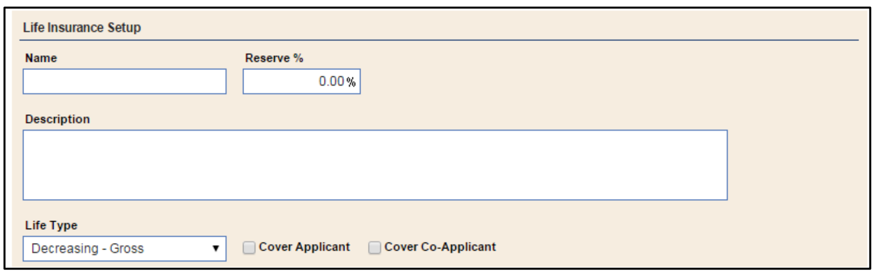
6. Click the **Default In Deal** checkbox to automatically add the plan to new deals.

7. Enter the plan name in the **Name** field, which is a required entry.

8. Enter the group number in the **Group Number** field.

9. The remaining information in this section is optional. However, if you add an address, the **State** is a required entry.

10. In the **Life Insurance Setup** section, type the name for the life plan in the **Name** field. This is a required field.



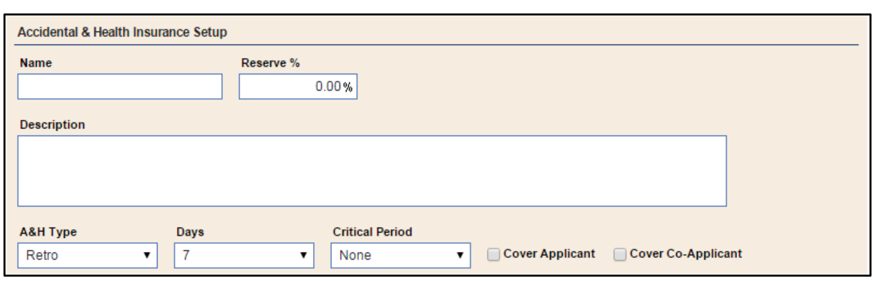
11. Enter the reserve in the **Reserve** field. This is an optional field.

12. Add a **Description** of the plan as needed. These are optional entries.

13. Choose the appropriate plan type from the **Life Type** menu. The field automatically defaults to **Decreasing - Gross** if not changed.

14. Use the **Cover Applicant** and **Cover Co-Applicant** boxes to default the coverage you wish to set for this provider.

15. In the **Accidental & Health Insurance Setup** section, enter the name for the plan in the **Name** field. This is a required field.



16. Enter the reserve in the **Reserve** field.

17. Add a **Description** of the plan as needed. This is an optional field.

18. The **A&H Type** defaults to Retro. Leave this entry or select Non-Retro as needed.

19. Select the length of the waiting period using the **Days** field, which defaults to 7. Leave this selection or choose 14 or 30 as needed.

20. The **Critical Period** defaults to None. Leave this entry or select 12 Month, 24 Month, 36 Month, or 48 Month.

21. Use the **Cover Applicant** and **Cover Co-Applicant** boxes to default the coverage you want for this plan.

22. Click **Save** to save the information. A green “Success” message will verify the information has been saved.

Removing Plans

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

1. Click **Life A&H** from the left navigation panel.

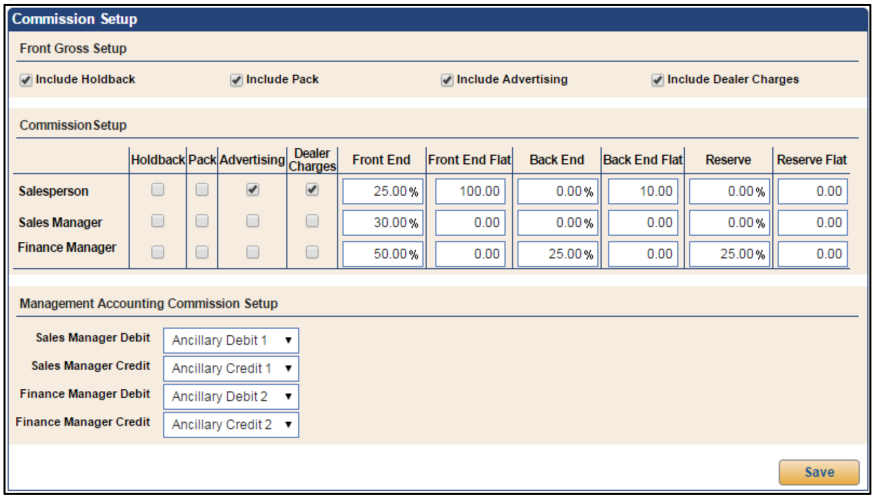
2. Select the plan from the Life A&H Plans list.

3. Click to clear the **Active** field.

4. Click **Save** to save the information. A green “Success” message will verify the information has been saved.

Commissioning

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



1. Click **Commissioning** under the Finance header in the left navigation panel.

2. In the **Front Gross Setup** section, click to select the items that should be included in the front gross.

3. Under **Commission Setup**, click to select the items (holdback, pack, advertising, and dealer charges) available for commission for the salespeople, sales managers, and finance managers.

4. Specify the percentages and flat rates that apply for front end, back end, and reserve portions of deals.

5. The **Management Accounting Commission Setup** section allows you to specify the ancillary accounts used to post commissions to the books in the Autosoft FLEX DMS Accounting module. Choose the appropriate ancillary accounts, and the commissions will automatically post to the specified accounts.

6. Click **Save** to save the information. A green “Success” message will verify the information has been saved.

Finishing up

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

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