

## Appendix D Driver's License Scanner

FLEX DMS F&I provides the option of using a driver's license scanner. This allows you to scan a license to add customer information into the program and to store license images. The program only supports the Scanshell 800R or the Snapshell IDR (available for purchase from Autosoft). No other scanners are supported.

The scanner integrates with three areas of the program. In the Customer area, you can use the scanner on the Search screen to add a new customer to the program or on the **Driver's License** tab in the customer's record to store a copy of the customer's driver's license. In a deal, you can use the scanner on the Search screen in the Applicant area to add a new customer to the program.

### Installing Your Scanner

You will not perform any installation and setup for the scanner without assistance from an Autosoft Customer Support Center representative. When you receive your scanner from Autosoft, contact the Support Center. ***Do not*** install any software that may accompany the scanner. Autosoft will install the necessary software and drivers required for integration with the FLEX DMS F&I program.

### Using the Scanner to Add a New Customer

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

**Tip:** When scanning the back of the license using the Snapshell IDR, make sure the magnetic strip is facing down.

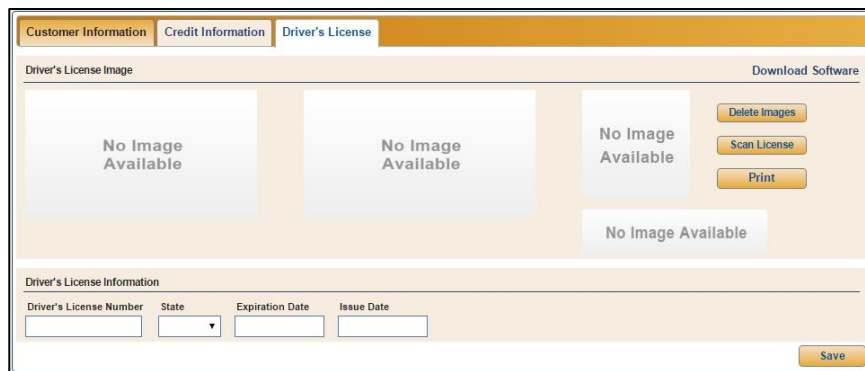
6. Click **Scan Front** or **Scan Back** based on the side you are scanning. When the scan is complete, the image will display in the corresponding window on the screen. If you do not like the way a side scanned, place the license back in the scanner, and click the corresponding **Scan** button to rescan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

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

## Scanning a Customer's License

Once a customer's information has been added to the program, you can scan and store the license using the **Driver's License** tab in the customer's file.

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



The screenshot shows a software interface with three tabs: "Customer Information", "Credit Information", and "Driver's License". The "Driver's License" tab is active. The main area is titled "Driver's License Image" and contains three placeholder boxes, each with the text "No Image Available". To the right of these boxes are three buttons: "Delete Images", "Scan License", and "Print". Above the "Scan License" button is a "Download Software" link. Below the image area is a section titled "Driver's License Information" with four input fields: "Driver's License Number", "State" (a dropdown menu), "Expiration Date", and "Issue Date". A "Save" button is located in the bottom right corner of the form.

6. Click **Scan License**.
7. The Driver's License Information screen appears.
8. Insert the license into the scanner.
9. Click **Scan Front** or **Scan Back** based on the side you are scanning. When the scan is complete, the image will display in the corresponding window on the screen. If you do not like the way a side scanned, place the license back in the scanner, and click the corresponding **Scan** button to rescan the side.
10. Scan the other side of the license by repeating steps 8 and 9.

11. When you scan the front of the license, the information will populate the fields at the bottom of the screen. The boxes next to the completed fields are checked. The program will update the customer's record with the information displayed. If you do not want to update a piece of information, click to uncheck the box. Review and edit the information as needed.
12. When you are finished scanning the license and editing the information, click **Save**.
13. The program updates the customer's information and displays the license images. In addition to the front and the back of the license, the screen displays the customer's photo and signature from the license in separate windows.

Driver's License Number	State	Expiration Date	Issue Date
<input type="text" value="R100110000"/>	<input type="text" value="OH"/>	<input type="text" value="01/31/2018"/>	<input type="text" value="02/01/2014"/>

## Printing the Driver's License

The printout will print the license images stored on the **Driver's License** tab and the information on the **Customer Information** tab.

1. Search for the customer.
2. Select the customer.
3. Click **Edit**.
4. Click the **Driver's License** tab.
5. The top part of the screen displays the scanned images.
6. Click **Print**.

## Deleting the Driver's License Images

1. Search for the customer.
2. Select the customer.
3. Click **Edit**.
4. Click the **Driver's License** tab.
5. The top part of the screen displays the scanned images.
6. Click **Delete Images**.
7. Click **Continue** when prompted to verify you want to delete the images.

## Using the Scanner to Add a New Customer to a Deal

1. Create a new deal.
2. Click **Applicant**.
3. Search for the customer as required.
4. Click **Add New w/ Scanner**.
5. The Driver's License Information screen opens.
6. Insert the driver's license into the scanner.
7. Click **Scan Front** or **Scan Back** based on the side you are scanning. When the scan is complete, the image will display in the corresponding window on the screen. If you do not like the way a side scanned, place the license back in the scanner, and click the corresponding **Scan** button to rescan the side.
8. Scan the other side of the license by repeating steps 6 and 7.
9. When you scan the front of the license, the information will populate the fields at the bottom of the screen. The boxes next to the completed fields are selected. If you do not want to include a piece of information (including an image), click to clear the box. Review the information and edit it as needed.
10. When you are finished scanning the license and editing the information, click **Save**.
11. Select the **Type** and **Source** for the applicant.
12. The program creates a new customer record and adds the customer to the deal.