



# Finance Document Archiving (FDA)



## User Guide

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# Getting Started

This guide describes the use of your FDA software on the ADP F&I system. Read and perform the setup steps described in the “*Start Here*” section of this chapter before using the FDA system.

## Overview

Your new **FDA** enhancement offers you:

- To establish archiving routines for your critical dealership data.
- To set parameters for the length of time you will store the data, and also allows you to perform custom archiving.
- Provides an easy-to-use interface that allows for customized reporting and analysis of your most valuable data.

## Typing Conventions

- When you read the instruction *<Enter>* in this guide, hit the carriage return key.
- The slash key (“/”) will get you out of any screen and will abort updating.
- The period key (“.”) will move the cursor directly to the processing prompt.

## Start Here

- Make sure that your FDA application is loaded onto your system. You can verify this by typing in **FDA** at the Function prompt while in the F&I system.
- If the application has been properly installed, the FDA Main Menu should be displayed on the screen. *If the message “Invalid Routine Name” or “Invalid Function” displays, then call your Customer Service Representative to correct the problem.*
- Setup a regular archive process to automatically backup your data on a regular basis. *See the chapter on the menu option “J - Job Stack Setup.”*

- Define the standard length of time you wish to retain your data in the archive file. *See the chapter on the menu option "R - Retention Periods"*
- Review the current reports to see which types of data are being stored. Use the FDA tool to customize your backups so the data most important to you is saved. *See the chapter on the menu option "CS – Control Record Setup"*
- For the sake of storage space economy, the FDA application does not store all types of data in the ADP database. Using the Control Record Setup option, the FDA application allows you to add data types that are not automatically stored. However, once data has been deleted from the ADP system, it cannot be added to the FDA archive. An initial review and comparison of all the data types can help to avoid losing valuable data.
- Taking the time to complete these steps will optimize the FDA application and its data-warehousing and retrieval capabilities.

# Organization of this Manual

The figure below shows the Main Menu screen of the FDA application. Each chapter in this manual will demonstrate a Main Menu function of the FDA application and review prompts and responses for that operation. As illustrated in the example below, the bold item indicates a prompt for user input and the paragraphs beneath it are the user options and instructions for continuing the operation.

At the ADP Finance & Insurance (F&I) account prompt, enter "FDA". The FDA Main Menu is displayed.

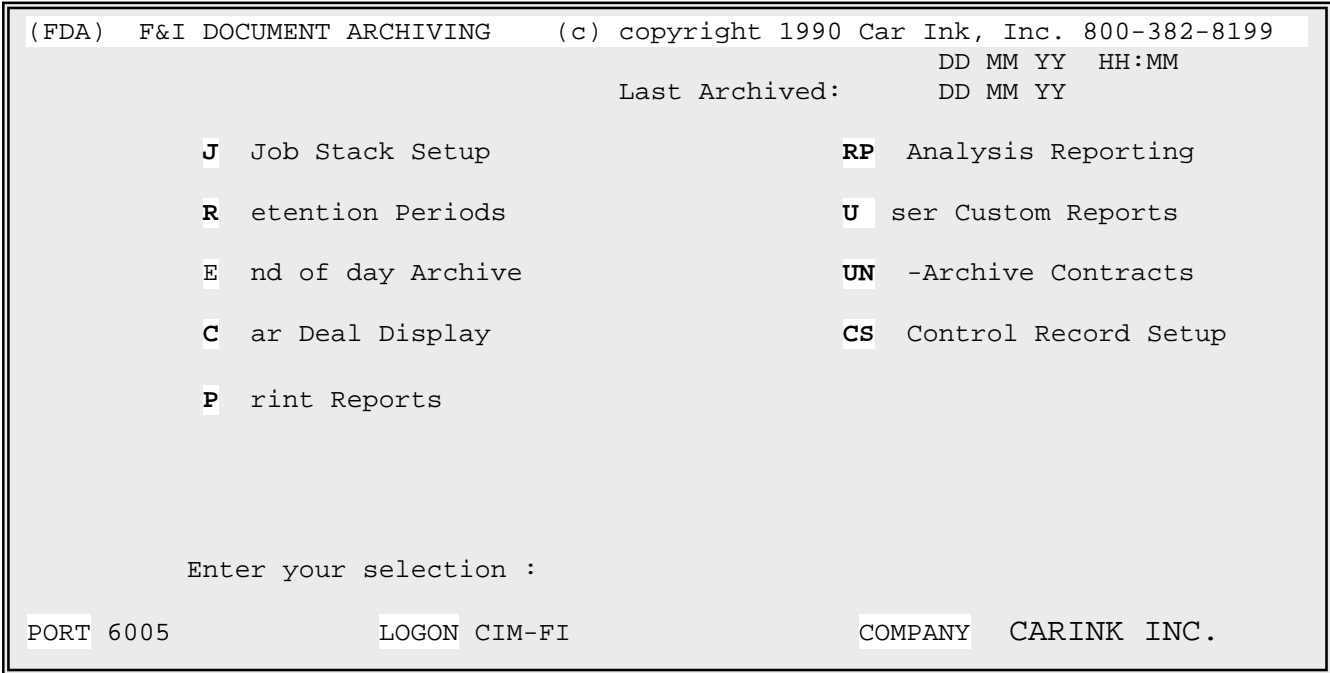


Figure 1 FDA Main Menu

**Enter your selection:**  
At this prompt, type in the menu selection you want to access and hit the <Enter> key to continue.

# J - Job Stack Setup

This function allows you to setup the JOB stack.

From the FDA menu type in the menu command "J" to access the *Job Stack Setup Rebuild Menu screen* (shown in the figure below).

```

(BFDA.J)                Setup REBUILD in JOB-STACK                DD MM YY

Use this routine to add the rebuild program to your
nightly JOB-STACK.

To remove it or put it in a different order, run the standard
ADP function JOB from the UF menu.

*****

CONTINUE (Y/N) ?

PORT 6069                LOGON SB-FI                COMPANY CARINK INC..

```

**Figure 2 Include REBUILD in Job-Stack Screen**

## Including the Backup Process in the Nightly Job Stack

### "Continue (Y/N)?"

Type "Y" at this prompt to instruct the program to automatically run the rebuild routine on a nightly basis.

## Canceling the Job Stack Setup

### "Continue (Y/N)?"

Type "N" at the "Continue (Y/N)?" prompt and the program will abort the process and return to the Main Menu.

To activate the job stack, at the function prompt enter JOB to schedule the "Daily" stack. Use the SCH option within JOB to define the frequency and time. Refer to your ADP manual for more specific information regarding JOB.

# R - Retention Periods

Defining how long to retain your archived data consists of defining the retention periods in number of months. This will specify how long to retain data pertaining to "Prospect" deals, and "Sold" deals, and then accepting the parameters you have specified.

The step-by-step procedures for this process are outlined in the following paragraphs.

From the FDA Main Menu, type "R" to access the Retention Periods screen, shown in the figure below.

```
(BFDA.R)                RETENTION PERIODS                DD MM YY

1) Number of Months to Retain Prospects ..... 120
2) Number of Months to Retain Sold Deals .... 120

"A"cept "EX"it "F"rame calculation -or- #
PORT 6069                LOGON SB-FI                COMPANY CARINK INC.
```

**Figure 3 Retention Period Definition Screen**

## Defining Data Retention Periods

### Number of Months to Retain Prospects .....

Type in the number of months you wish to retain sales prospects.

### Number of Months to Retain Sold Deals ....

Type in the number of months you wish to retain sold deals.

### "A"cept "EX"it "F"rame calculation -or- #

This user prompt allows you to accept the data retention periods, abort the process, calculate estimated storage space, or edit the data retention

periods. These four options are described below. Type "A" at this prompt to accept the retention periods you have defined at the previous prompts and hit the <Enter>key to return to the Main Menu. Type "EX" at this input prompt to abort the process and hit the <Enter>key to return to the Main Menu. To begin a simple calculation to estimate how much disk space will be used to retain these records, type "F" at this input prompt.

### Enter Number of Retail Units per month:

Type in an estimate of the number of retail units per month and hit the <Enter> key to produce an estimate of your data storage requirements.

```
(BFDA.R)                                RETENTION PERIODS                                DD MM YY

1) Number of Months to Retain Prospects ..... 120
2) Number of Months to Retain Sold Deals .... 120

Enter Number of Retail Units per month: 50

FRAMES REQUIRED FOR SOLD DEALS                1485
FRAMES REQUIRED FOR PROSPECTS                 615
TOTAL NUMBER OF FRAMES REQUIRED              2100

RETURN to continue ..
"A"cept "EX"it "F"rame calculation -or- # F
PORT 6069                                LOGON SB-FI                                COMPANY CARINK INC.
```

**Figure 4 Disk Storage Calculation Screen**

### Editing Retention Period Definitions

"A"cept "EX"it "F"rame calculation -or- #:

To edit the retention periods you have defined type in a "1" and hit the <Enter> key to edit the number of months to retain prospects. Type in a "2" and hit the <Enter> key to edit the number of months to retain completed sales.

# E - End of Day Archive

This function allows you to process the End of the Day Archive.

From the FDA menu type in the menu command "E" to access the *End of Day Archive* screen (shown in the figure below). The program will prompt you to run the archive routine at this time, or to specify a customized time to schedule the back up today.

```
(BFDA.E)      E N D   O F   D A Y   I N D E X I N G      03 JUL 2000

              Run "N"ow or "L"ater or "EX"it      L

              11:49:38

SLEEP TILL (24 CLOCK, example 8:00 PM = 20:00) ?
PORT 6069          LOGON SB-FI          COMPANY CARINK INC.
```

**Figure 5 End of Day Archiving Prompt**

### Run "N"ow or "L"ater or "EX" it

From this input prompt you may instruct the program to run a backup index process now, schedule it to run at a later time, or cancel the process and return to the Main Menu.

### Running the Index Process

#### Run "N"ow or "L"ater or "EX" it

From this prompt, type "N" and hit the <Enter> key to the start indexing process now.

### Scheduling an Index Process for Later

#### Run "N"ow or "L"ater or "EX" it

From this prompt, type "L" and hit the <Enter> key to the schedule the indexing process for later. The program will display a new prompt:

**SLEEP TILL (24 CLOCK, example 8:00 PM – 20:00) :**  
Type in the scheduled time for backup and hit the <Enter> key. The machine will go into sleep mode until the backup is complete.

If you should use the Later start time be sure to use the 24 hour clock system.

### **Canceling the Process**

Type "EX" and hit the <Enter> key to abort the process and return to the Main Menu.

# C - Car Deal Display

This function allows you to retrieve car deal records.

At the FDA Main Menu, at this prompt type **C** to access the Index Lookup screen, shown in the figure below.

The figure below shows a sample Car Deal record.

```
(BFDA.C)          F D A  Index LOOKUP          Page:  1    DD MM YY
  

  S  tock Number lookup
  L  ast 8 of VIN lookup
  C  ustomer Name lookup
  D  eal Number lookup
  

  Enter lookup option:
  

PORT 6069          LOGON SB-FI          COMPANY CARINK INC.
```

**Figure 6 Car Deal Display Screen**

**Enter your selection:**

This menu gives you a choice of four different options to retrieve files from your database of archived car deals.

## ***Stock Number Lookup***

This function will allow you to look up a car deal by stock number.

At the Car Deal Display menu, type "**S**" to access the Stock Number Lookup.

**Enter Stock Number:**

Type in the 5 digit dealership stock number at this prompt, then hit the *<Enter>* key to proceed to the next screen. The program will display the Index Lookup Screen displaying the deal information that relates to the stock number you just specified.

## ***Last 8 or VIN Lookup***

This feature allows you to look up a deal by VIN number.

At the Car Deal Display, type **L** to access the Last 8 or VIN Lookup function.

### **Enter last 8 digits of VIN:**

Type in the last 8 digits of the Vehicle Identification Number (VIN) at this prompt, then hit the *<Enter>* key to proceed to the next screen. The application will display the Index Lookup Screen displaying the deal information that relates to the VIN number you just specified.

## ***Customer name Lookup***

This feature allows you to look up a deal by customer.

At the Car Deal Display, type **C** to access the Customer Name Up function.

### **Enter Customer Last Name:**

Type in information about the customer at this prompt, according to one of the three criteria beneath the prompt:

Enter first 3 letters of Last Name or, enter Last Name, First Init, or  
Enter Last name, First Name to select.

Hit the *<Enter>* key to proceed to the next screen. The program will display an alphabetical listing of all records that meet the criterion you specified.

Matching items for selection SMITH				
1)	3226	BETTY SMITH	P5764	1995 CADI DEVI
2)	32610	CAREY W. SMITH	VP084	1997 PONT GRAN
3)	33173	MELINDA SMITH	VJT155	1997 JEEP WRA
4)	33611	S. ANN SMITH	WJ009	1998 JEEP GRCH
5)	33824	FRANCIS E SMITH	WC054	1998 CADI DEV
6)	33863	EDWARD W SMITKO	WC036	1998 CADI DEVI
7)	33961	TIMOTHY P. SMITH	WL039A	1990 PONT 6000
8)	34022	CAROLYN M. SMITH	WC005A	1997 BUIC LESA

"F"orward "B"ackward "EX"it or #

**Figure 7 Alphabetical Listing of Customer Records**

At the bottom of the screen is an input prompt allowing you to scroll forward or backward through the records, exit and return to the previous menu, or type in the number identifying the record you wish to view.

- Type "F" at the prompt and hit the <Enter> key to scroll forward through the records.  
*or*
- Type "B" at the prompt and hit the <Enter> key to scroll backwards through the records.  
*or*
- Type "EX" at the prompt and hit the <Enter> key to abort the process and return to the previous menu.  
*or*
- Type in the line number of the customer record you wish to select at the prompt and hit the <Enter> key to select a customer record. This will invoke the Index Lookup Screen displaying the deal information that relates to the record number you just specified.

## ***Deal Number Lookup***

This feature allows you to look up a deal by deal number.

At the Car Deal Display, type **D** to access the Deal Number Lookup function.

```
(BFDA.C)          F D A  Index LOOKUP      Page:  1    DD MM YY
Deal Number  :
Slsm 1-2:
Comment:
  --- BUYER INFO ---
Status:
Purchase/Lease:
  --- CO-BUYER INFO ---

PORT 6069          LOGON SB-FI          COMPANY CARINK INC.
```

**Figure 8 Deal Number Input Prompt**

**Deal Number :**

Type in the deal number and hit the *<Enter>* key. When entering a deal number the remainder of the information will automatically pull from F & I, and you will be able to see a detailed report on the deal you specified.

## ***Viewing F&I Deal Report Screens***

This screen displays much of the information about the deal that you have originally documented using the ADP system, then archived using the FDA application. The screen has three user options available from the prompt in the lower left corner of the screen, including:

- displaying customized details about the deal
- scrolling through multiple pages of the deal record
- exiting the deal and returning to the menu.

These procedures are described below.

```

(BFDA.C) F D A   Index LOOKUP           Page:  1           DD MM YY

Deal Number   : 198745           Deal Date: 02/15/1998
Slsm 1-2: 1279 WHITE,MICH       38% of term.  40 months left!
Comment:      * BOOKED *       Status: F
  --- BUYER INFO ---           Purchase/Lease: PURCHASE
Cust# : 8436646                 --- CO-BUYER INFO ---
      ROBERT C ORTLIEB         Cust# :
      6020 STUMPH RD #C106
      PARMA OH 44130
County: CUYAHOGA
Home : 440-843-6646Bus :       County:
Birth : 10/11/1969             Home :           Bus :
Spouse Name:                   Birth :
Spouse DOB:                     --- SALES ---
  --- PURCHASE ---           Net Trades :           0.00
Stk# 57402 1FAFP13P8WW208546 Finance Amt : 16,740.13
      NEW 1998 FORD ESCO       Finance Charge: 4,119.17
      ATLANTIC_BLUE 4DR P13 C First Pmt Date: 03/17/1998
  --- COST ---                 Term :           66
Cost Vehicle Sold: 13,655.60 Monthly Pmt : 316.05
                               Price : 15,563.72

"U"ser Fields, "O"ptions, "S"pecial Fields, Page#, "EX"it:

PORT 6069           LOGON SB-FI           CAMPANY CARINK INC.

```

**Figure 9 FDA Index Lookup Screen**

### Displaying Custom Information about the Deal

In order to economize disk space, the FDA application does not archive all fields from the ADP F&I files. In order to accommodate the user's needs, the FDA application allows you to include ADP fields that are not automatically included in the FDA backup process. This is done using the Control Record command from the Main Menu. These custom fields are not inserted into the regular deal information screen. Instead, they are stored and displayed in their own separate part of the application.

#### **"U"ser Fields, "O"ptions, "S"pecial Fields, Page#, "EX"it:**

Typing "U" at this prompt will display a new screen, shown in the figure below:

```

(BFDA.C)                F D A  Index LOOKUP                Page:  1    DD MM YY
Deal Number  : 32610                Deal Date: 05/19/1997
Slsm 1-2: 1499                    62% of term.  21 months left!
Comment:    * BOOKED *                Status: F
User Defined Fields
  1) STATUS      :    32610

                                     :
                                     :

Page#, "EX"it:
PORT 6069                LOGON SB-FI                COMPANY CARINK INC.

```

**Figure 10 Custom Information Screen**

This screen will display any custom control fields you have defined using the Control Record Setup feature. If you have not defined any custom fields, this screen will be empty.

**Page#, "EX"it:**

- Type in the page number at this prompt to display additional pages of custom information.
- or*
- Type "EX" at the prompt and hit the <Enter> key to return to main search options menu.

**Viewing Vehicle Options**

**"U"ser Fields, "O"ptions, "S"pecial Fields, Page#, "EX"it:**

Typing "O" at this prompt will display a new screen, shown in the figure below:

```

(BFDA.C)          F D A  Index LOOKUP          Page:  1   DD MM YY
Deal Number   : 32610          Deal Date: 05/19/1997
Slsm 1-2: 1499          62% of term.  21 months
left!
Comment:      * BOOKED *          Status: F
  --- BUYER INFO ---          Purchase/Lease: PURCHASE
Cust# : 4611138          --- CO-BUYER INFO ---
          CAREY W. SMITH          Cust# :

+-Vehicle Options-----+
| A          REQ FOR 2DR CPE GT
| AR9        SEATS, LEATHER BUCKET
| D81        REAR DECKLID SPOILER
| FE9        FEDERAL EMISSIONS
| L36        3.8L (231) SFI V6 3800 SERIES II ENGINE (STD)
| MX0        4-SPEED ELECTRONICALLY-CONTROLLED AUTOMATIC
| R6G        WHEELS: 16" ALUMINUM/CROSSLACE/CHAMPAGNE
| 1SC        OPTION PACKAGE 1SC
| 41U        PAINT, BLACK
| 522        TRIM, TAUPE LEATHER
+-----+
                                     <more below>+

To view more options use PAGEUP or PAGEDOWN.
F1=Help  F3=Exit
    
```

Figure 11 Vehicle Options Screen

**Viewing Special Fields**

"U"ser Fields, "O"ptions, "S"pecial Fields, Page#, "EX"it:

Typing "S" at this prompt will display a new screen, shown in the figure below:

```

(BFDA.C)          F D A  Index LOOKUP          Page:  1   DD MM YY

Deal Number   : 32610          Deal Date: 05/19/1997
Slsm 1-2: 1499          62% of term.  21 months left!
Comment:      * BOOKED *          Status: F
  --- BUYER INFO ---          Purchase/Lease: PURCHASE

+-Special Fields-----+
| BUYER SALE          FL
| DEAL NUMBER         32610
| GM LEASE EXP DATE.. 31 DEC 1967
| INSURANCE(1)-TERM..
| BODY
| USA COUNTRY
| FLEET
+-----+

F3=Exit
    
```

Figure 12 Special Field

### Viewing Additional Pages of the Deal Record

**"U"ser Fields, "O"ptions, "S"pecial Fields, Page#, "EX"it:**

Deal records typically consist of three separate pages of information. At this prompt, type in the page number you wish to view and hit the <Enter> key to view different pages.

### Returning to the Index Lookup Screen

**"U"ser Fields, "O"ptions, "S"pecial Fields, Page#, "EX"it:**

Type **"EX"** at this prompt and hit the <Enter> key to return to main search options menu.

# P - Print Reports

The step by step procedure for generating these reports is outlined in the following paragraphs, as well as a sample of each report type.

From the FDA Main Menu, type “**P**” at the prompt to access the Periodic Reports menu, shown in the figure below. This function will display a list of report types to choose from, together with the date of the last run.

(BFDA.P) PERIODIC REPORTS		DD MM YYYY
FUNCTION		LAST RUN
1 SALESMAN CUSTOMER LISTING by FIRST NAME		02 OCT 1998
2 SALESMAN 12-MONTH SUMMARY		11 JUN 1997
3 BANK DETAIL LISTING		01 DEC 1998
4 BANK 12-MONTH SUMMARY		11 JUN 1997
5 ZIP CODE DETAIL		11 JUN 1997
6 ZIP 12-MONTH SUMMARY		25 MAR 1996
7 MODELS CUSTOMER LISTING		14 MAR 1994
8 MODELS 12-MONTH SUMMARY		14 MAR 1994
9 COLOR DETAIL LISTING		11 JUN 1997
10 COLOR 12-MONTH SUMMARY		14 MAR 1997
11 MODEL NUMBER CODE DETIAL		11 JUN 1997
12 MODEL-NUMBER 12-MONTH SUMMARY		11 JUN 1997
13 ZIP/MODEL DETAIL		30 SEP 1998
14 ZIP/MODEL SUMMARY		11 JUN 1997

Enter Function Number  
 PORT 6069                      LOGON SB-FI                      COMPANY CARINK INC.

**Figure 13 Periodic Reports Menu**

To generate any of the following reports, at the input prompt type in the number of the report-type and hit the *<Enter>* key. This will create two new input prompts at the base of the screen, prompting for report format and for salesman number information.

## Selecting the Report Format

### Line Printer (Y/N):

- To send the results of your search to the printer, type a “**Y**” at this prompt.
- To send the results of your search to the screen for display only, type an “**N**” at this prompt.

## Specifying the Report Type

**From Salesman# AND To Salesman# separated by spaces:**

This prompt requires two salesman numbers to be input. If you only want to generate information on one salesman, type in that number, hit the space key, then type in the same number a second time. Hit the *<Enter>* key to display or print the report.

# RP – Analysis Reporting

The step by step procedure for generating these reports is outlined in the following paragraphs, as well as a sample of each report type.

From the FDA Main Menu, type “**RP**” at the prompt to access the Analysis Reporting menu, shown in the figure below. This function will display a list of report types to choose from.

```
(BFDA)                ARCHIVING ANALYSIS REPORTING                03 JUL 2000
                                03 JUL 00  01:14PM
                                Last Archived: 20 JUN 00

  S  alesman Analysis                SD  = Salesman Detail
  M  odel Analysis                    BD  = Bank Detail
  Z  ip Code Analysis                 ZD  = Zip Detail
  B  ank Loyalty Analysis             ZM  = Zip Model Detail

  N  = Model Number Analysis
  O  = Color Analysis

Enter your selection:
```

Figure 14 Analysis Reporting Menu

### Enter your selection:

To generate any of the above-listed analysis reports, at this input prompt type in the abbreviation to the left of the report-type and hit the *<Enter>* key. This will generate the next input screen prompting you for specific search criterion, depending upon the type of analysis you have selected. The following section describes how to fill out the prompt, and a description of the resulting report.

## **S - Salesman Analysis**

### SALESMAN NUMBER

Type in a “?” at this prompt to display a current listing of salesmen within your database. Hit the *<Enter>* key to scroll through the list of employees, and hit the **<Control> + X** to return to the Salesman #

query screen. Entering a Salesman number provides history and analysis for a particular salesman.

The figure below shows a sample report for salesman #1499.

(BFDA.INQUIRY)	SALESMAN ANALYSIS								DD	MM	YY	HH:MM	
# 1499													
	UNITS	PURCH	%	LEASE	%	FIN	%	CL	%	A&H	%	MBI	%
JAN	7.0	7.0	100			7.0	100	7.0	100				
FEB													
MAR													
APR													
MAY	20.0	14.0	70	6.0	30	10.0	50			2.0	10	6.0	30
JUN	16.0	16.0	100			8.0	50					8.0	50
JUL													
AUG	8.0	8.0	100			8.0	100						
SEP	40.0	40.0	100			16.0	40					16.0	40
OCT	40.0	32.0	80	8.0	20	8.0	20					8.0	20
NOV	30.5	30.5	100			10.5	34					14.5	47
DEC	56.0	49.0	87	7.0	12	14.0	25	7.0	12	7.0	12	7.0	12
YTD	217.5	196.5	90	21.0	9	81.5	37	14.0	6	9.0	4	59.5	27
AVG	27.1	24.5	90	2.6	9	10.1	37	1.7	6	1.1	4	7.4	27

**Figure 15 Salesman Analysis**

The following fields are displayed in the Salesman Analysis report. Each column is broken down into a monthly detail, and yearly totals and averages are displayed in the last two rows.

**Units:** Number of units per month sold or leased over a one year period.

**Purch:** The number of purchases per month made by a particular salesman.

**Purch%:** For a particular salesman, of all vehicle transactions (a combination of purchases and leases), the percentage of these transactions that are purchases.

**Lease:** The number of leases per month made by a particular salesman.

**Lease%:** For a particular salesman, of all vehicle transactions (a combination of purchases and leases), the percentage of these transactions that are leases.

**Fin:** Total number of vehicles financed.

**Fin%:** Total percentage of vehicles financed.

**CL:** Total number of Credit Life Insurance packages sold by this salesman.

**CL%:** Percentage of total units for which Credit Life Insurance packages were sold by this salesman.

**A&H:** Total number of Accident & Health packages sold for this model.

**A&H%:** Percentage of total units for which Accident & Health packages were sold by this salesman.

**MBI:** Number of Mechanical Breakdown Insurance packages sold by this salesman.

**MBI%:** Percentage of total units for which Mechanical Breakdown Insurance packages were sold by this salesman.

## ***M - Model Analysis***

### **ACCT MODEL CODE ..**

Type in a "?" at this prompt to display a current listing of model codes used within your database. Hit the <Enter> key to scroll through the list, and hit the <Control> + X to return to the **ACCT MODEL CODE** a query screen. Entering a Model Code at the prompt provides an annual history and analysis for a particular model.

The figure below shows a sample report for a Neon.

(BFDA.INQUIRY)	MODEL	CODE	ANALYSIS	DD	MM	YY	HH:MM					
# NEON												
NEON												
UNITS	PURCH	%	LEASE	%	FIN	%	CL	%	A&H	%	MBI	%
JAN												
FEB	7.0		7.0	100			7.0	100			7.0	100
MAR												
APR												
MAY	4.0		4.0	100			4.0	100			2.0	50
JUN												
JUL												
AUG												
SEP												
OCT												
NOV	8.0		8.0	100			8.0	100			8.0	100
DEC												
YTD	19.0		19.0	100			19.0	100			17.0	89
AVG	6.3		6.3	100			6.3	100			5.6	88

**Figure 16 Model Analysis Sample Report**

The following fields are displayed in the Model Analysis report. Each column is broken down into a monthly detail, and yearly totals and averages are displayed in the last two rows.

**Units:** Number of units per month sold or leased over a one year period.

**Purch:** The number of purchases per month.

**Purch%:** For a particular model, of all vehicle transactions (a combination of purchases and leases), the percentage of these transactions, which are purchases.

**Lease:** The number of leases per month for a particular model.

**Lease%:** For a particular car model, of all vehicle transactions (a combination of purchases and leases), the percentage of these transactions that are leases.

**Fin:** Total number of this model type financed.

**Fin%:** Total percentage of this model type financed.

**CL:** Total number of Credit Life Insurance packages sold for this model

**CL%:** Percentage of total units for which Credit Life Insurance packages were sold for this model

**A&H:** Total number of Accident & Health packages sold for this model.

**A&H%:** Percentage of total units for which Accident & Health packages were sold for this model.

**MBI:** Number of Mechanical Breakdown Insurance packages sold for this model.

**MBI%:** Percentage of total units for which Mechanical Breakdown Insurance packages were sold in this zip-code.

## ***Z - Zip Code Analysis***

### **ZIP CODE .....**

Type in a "?" at this prompt to display a current listing of zip-codes within your database. Hit the <Enter> key to scroll through the list, and hit the <Control> + X to return to the **ZIP CODE .....** query screen. Enter a Zip code to analyze and view where most of your customers reside.

The figure below shows a sample report for zip-code 32055.

(BFDA.INQUIRY)		ZIP CODES ANALYSIS				DD MM YY HH:MM			
# 32055									
	UNITS	PURCH	% LEASE	% FIN	% CL	% A&H	% MBI		
JAN	7.0	7.0	100						
FEB									
MAR									
APR									
MAY									
JUN									
JUL									
AUG									
SEP									
OCT									
NOV									
DEC									
YTD	7.0	7.0	100						
AVG	7.0	7.0	100						

**Figure 17 Zip-Code Analysis Sample Report**

The following fields are displayed in the Zip-Code Analysis report. Each column is broken down into a monthly detail, and yearly totals and averages are displayed in the last two rows.

**Units:** Number of units per month sold or leased over a one-year period within this zip code.

**Purch:** The number of purchases per month for this zip code.

**Purch%:** For a particular zip code, of all vehicle transactions (a combination of purchases and leases), the percentage of these transactions which are purchases.

**Lease:** The number of leases per month for a particular zip code.

**Lease%:** For a particular zip code, of all vehicle transactions (a combination of purchases and leases), the percentage of these transactions that are leases.

**Fin:** Total number of financed transactions for this zip code.

**Fin%:** Total percentage of financed transactions for this zip code.

**CL:** Total number of Credit Life Insurance packages sold in this zip code.

**CL%:** Percentage of total units for which Credit Life Insurance packages were sold in this zip code.

**A&H:** Total number of Accident & Health packages sold in this zip code.

**A&H%:** Percentage of total units for which Accident & Health packages were sold in this zip code.

**MBI:** Number of Mechanical Breakdown Insurance packages sold in this zip code.

**MBI%:** Percentage of total units for which Mechanical Breakdown Insurance packages were sold in this zip-code.

## B - Bank Loyalty Analysis

### BANK CODE .....

Type in a "?" at this prompt to display a current listing of bank codes within your database. Hit the <Enter> key to scroll through the list, and hit the <Control> + X to return to the BANK CODE .....query screen. Entering a bank code provides history and analysis for a particular bank.

The figure below shows a sample report for Nations Bank & Financial Services.

(BFDA.INQUIRY) BANK SOURCING ANALYSIS DD MM YY HH:MM													
# NATIONS													
	UNITS	PURCH	%	LEASE	%	FIN	%	CL	%	A&H	%	MBI	%
JAN													
FEB													
MAR													
APR													
MAY													
JUN													
JUL													
AUG													
SEP													
OCT	7.0	7.0	100			7.0	100					7.0	100
NOV													
DEC													
YTD	7.0	7.0	100			7.0	100					7.0	100
AVG	7.0	7.0	100			7.0	100					7.0	100

Figure 18 Bank Code Analysis Sample Report

The following fields are displayed in the Bank Loyalty Analysis report. Each column is broken down into a monthly detail, and yearly totals and averages are displayed in the last two rows.

**Units:** Number of units per month sold or leased over a one year period financed by this particular bank.

**Purch:** The number of purchases per month financed by this bank.

**Purch%:** For a particular bank, of all vehicle transactions (a combination of purchases and leases), the percentage of these transactions which are purchases.

**Lease:** The number of leases per month for a particular bank.

**Lease%:** For a particular bank, of all vehicle transactions (a combination of purchases and leases), the percentage of these transactions which are leases.

**Fin:** Total number of financed transactions for this bank.

**Fin%:** Total percentage of financed transactions for this bank.

**CL:** Total number of Credit Life Insurance packages sold as part of transactions with this bank.

**CL%:** Percentage of total units for which Credit Life Insurance packages were sold as part of transactions with this bank.

**A&H:** Total number of Accident & Health packages sold as part of transactions with this bank.

**A&H%:** Percentage of total units for which Accident & Health packages were sold as part of transactions with this bank.

**MBI:** Number of Mechanical Breakdown Insurance packages sold as part of transactions with this bank.

**MBI%:** Percentage of total units for which Mechanical Breakdown Insurance packages were sold as part of transactions with this bank.

## N - Model Number Analysis

### MODEL NUMBER ...

Type in a "?" at this prompt to display a current listing of model numbers within your database. Hit the <Enter> key to scroll through the list, and hit the <Control> + X to return to the MODEL NUMBER ... query screen. Entering a Model Number provides history and analysis for a particular model number.

The figure below shows a sample report for Model Number 1JC37.

(BFDA.INQUIRY)		MODEL NUMBER ANALYSIS				DD	MM	HH	HH:MM			
# 1JC37												
UNITS	PURCH	%	LEASE	%	FIN	%	CL	%	A&H	%	MBI	%
JAN												
FEB												
MAR												
APR												
MAY												
JUN												
JUL												
AUG	8.0		8.0	100								
SEP												
OCT												
NOV												
DEC												
YTD	8.0		8.0	100								
AVG	8.0		8.0	100								

**Figure 19 Model Number Analysis Sample Report**

The following fields are displayed in the Model Number Analysis report. Each column is broken down into a monthly detail, and yearly totals and averages are displayed in the last two rows.

**Units:** For a particular model, the number of units per month sold or leased over a one year period.

**Purch:** For a particular model, the number of purchases per month financed.

**Purch%:** For a particular model, of all vehicle transactions (a combination of purchases and leases), the percentage of these transactions which are purchases.

**Lease:** For a particular model , the number of leases per month.

**Lease%:** For a particular model, of all vehicle transactions (a combination of purchases and leases), the percentage of these transactions which are leases.

**Fin:** For a particular model, the total number of financed transactions.

**Fin%:** For a particular model, the total percentage of financed transactions

**CL:** For a particular model, the total number of Credit Life Insurance packages sold as part of transactions with this bank

**CL%:** For a particular model, the percentage of total units for which Credit Life Insurance packages were sold.

**A&H:** For a particular model, the number of Accident & Health packages sold as part of transactions with this bank.

**A&H%:** For a particular model, the percentage of total units for which Accident & Health packages were sold.

**MBI:** For a particular model, the number of Mechanical Breakdown Insurance packages sold.

**MBI%:** For a particular model, the percentage of total units for which Mechanical Breakdown Insurance packages were sold.

## ***O - Color Analysis***

**COLOR .....**

Type in a "?" at this prompt to display a current listing of color codes within your database. Hit the <Enter> key to scroll through the list, and hit the <Control> + X to return to the Color query screen. Enter a color code to view the number of units sold per month and the percentages.

The figure below shows a sample report for Black.

(BFDA.INQUIRY)	COLOR ANALYSIS												DD	MM	YY	HH:MM	
# BLACK	UNITS	PURCH	%	LEASE	%	FIN	%	CL	%	A&H	%	MBI	%				
JAN	42.0	28.0	66	14.0	33	7.0	16					7.0	16				
FEB	49.0	49.0	100			14.0	28										
MAR	35.0	28.0	80	7.0	20	7.0	20										
APR	45.0	45.0	100														
MAY	14.0	14.0	100			4.0	28					2.0	14				
JUN	104.0	96.0	92	8.0	7	32.0	30					16.0	15				
JUL																	
AUG	8.0	8.0	100														
SEP	48.0	32.0	66	16.0	33	16.0	33					8.0	16				
OCT	56.0	56.0	100			16.0	28					8.0	14				
NOV	61.0	53.0	86	8.0	13	23.0	37					16.0					
DEC	35.0	28.0	80	7.0	20	21.0	60	7.0	20	7.0	20	7.0	20				
YTD	497.0	437.0	87	60.0	12	140.0	28	7.0	1	7.0	1	64.0	12				
AVG	45.1	39.7	88	5.4	11	12.7	28	0.6	1	0.6	1	5.8	12				

**Figure 20 Color Analysis Sample Report**

The following fields are displayed in the Color Analysis report. Each column is broken down into a monthly detail, and yearly totals and averages are displayed in the last two rows.

**Units:** For a particular color, the number of units per month sold or leased over a one year period.

**Purch:** For a particular color, the number of purchases per month financed.

**Purch%:** For a particular color, of all vehicle transactions (a combination of purchases and leases), the percentage of these transactions which are purchases.

**Lease:** For a particular color, the number of leases per month.

**Lease%:** For a particular color, of all vehicle transactions (a combination of purchases and leases), the percentage of these transactions which are leases.

**Fin:** For a particular color, the total number of financed transactions.

**Fin%:** For a particular color, the total percentage of financed transactions

**CL:** Total number of Credit Life Insurance packages sold for this color

**CL%:** Percentage of total units for which Credit Life Insurance packages were sold for this color

**A&H:** For a particular color, the number of Accident & Health packages sold as part of transactions with this bank.

**A&H%:** For a particular color, the percentage of total units for which Accident & Health packages were sold.

**MBI:** For a particular color, the number of Mechanical Breakdown Insurance packages sold.

**MBI%:** For a particular color, the percentage of total units for which Mechanical Breakdown Insurance packages were sold.

## ***SD - Salesman Detail***

### **SALESMAN NUMBER**

Type in a "?" at this prompt to display a current listing of salesmen within your database. Hit the <Enter> key to scroll through the list, and hit the <Control> + X to return to the **SALESMAN NUMBER** query screen. Entering a Salesman number provides a detailed listing of transactions for a particular salesman. This report is a breakout of the Salesman Analysis report.

The figure below shows a sample report for salesman number 1418.

ZIP CODE REPORT HH:MM:SS DD MM YY							
ZIP..	DEAL#..	DATE..	STOCK.....	YR/MAKE/MODEL...	LAST 8..	CUSTOMER	
NAME.....							
32966	33067	072597	VJ153	1997 JEEP GRCH	VC777862	PETER G. PETROPOUL OS	
***							
33418	33076	072897	TPT289	1996 PONT GRA	TM527970	SUZETTE SWAN MCGOU GH	
***							
33884	33126	080197	VJ082	1997 JEEP GRCH	VC589463	SAMUEL M CRISSMAN	
***							
34949	33242	083097	WL006	1998 OLDS 88	W4800157	CYNTHIA L. KIPP	
34949	33118	073097	P5682	1996 OLDS 88	T4820804	ROBERT C PARTENHEI MER	

**Figure 21 Salesman Report Detail**

The following pieces of information are displayed for all transactions made by a particular salesman for a one year period.

- Zip-code
- Deal Number
- Date of Purchase
- Vehicle Stock Number
- Year, Make & Model of the vehicle
- Last 8 digits of VIN Number
- Customer Name

Strike any key to page through the report detail. Strike the <Enter> key when you have reached the final page to return to the Salesman Number query screen.

## ***BD - Bank Detail***

### **BANK CODE ....**

Type in a "?" at this prompt to display a current listing of salesmen within your database. Hit the <Enter> key to scroll through the list, and hit the <Control> + X to return to the **BANK CODE ....**query screen. Entering a bank code provides a detailed listing of transactions for a particular bank. This report is a breakout of the Bank Loyalty Analysis report.

The figure below shows a sample report for Americredit Financial, (code AMERI).

ZIP..	DEAL#..	DATE..	STOCK.....	YR/MAKE/MODEL...	LAST 8..	CUSTOMER NAME.....
32908	34512	030798	P5775	1993 JEEP WRA	PP253574	TERRY R OGLETREE
***						
34952	34624	032398	WL145	1998 OLDS SILH	WD233661	TEODORO A ANDRADE
34952	34682	040798	P5803	1996 TOYO TACO	TZ174027	WILLIAM H EDMONDSO N JR
34952	34708	040498	WP058	1998 PONT GRA	WC770284	WILLIAM T MINOGUE
***						
34953	34632	032498	P5679	1994 PONT SUNB	R7572232	BART A BRUNER
34953	34808	042098	WJ071	1998 JEEP WRA	WP766207	MATTHEW J FRANCISC O
***						
34974	34618	032198	P5815	1993 CHEV 1500	PE108702	JEFFREY LEE FITE
***						

**Figure 22 Bank Analysis Detail Sample Report**

The following pieces of information are displayed for all transactions made by a particular salesman for a one year period.

- Zip-code
- Deal Number
- Date of Purchase
- Vehicle Stock Number
- Year, Make & Model of the vehicle
- Last 8 digits of VIN Number
- Customer Name

Strike any key to page through the report detail. Strike the <Enter> key when you have reached the final page to return to the Salesman Number query screen.

## ZD - ZIP Detail

### ZIP CODE .....

Type in a "?" at this prompt to display a current listing of salesmen within your database. Hit the <Enter> key to scroll through the list, and hit the <Control> + X to return to the **ZIP CODE .....** query screen. Entering a zip-code provides a detailed listing of transactions for a particular zip-code. This report is a breakout of the Zip-code Analysis report.

The figure below shows a sample report for zip-code 06484.

ZIP CODE REPORT HH:MM:SS DD MM YY									
ZIP..	DEAL#..	DATE..	STOCK.....	YR/MAKE/MODEL...	LAST 8..	CUSTOMER NAME.....			
31548	33302	091697	VJ150	1997 JEEP WRA	VP543255	KINGS BAY CHRY PLY M DODGE JEEP EAGLE , INC.			
***									
Key RETURN...									

**Figure 23 Zip-code Analysis Detail Sample Report**

The following pieces of information are displayed for all transactions made by a particular salesman for a one year period.

- **Zip-code**
- **Deal Number**
- **Date of Purchase**
- **Vehicle Stock Number**
- **Year, Make & Model of the vehicle**
- **Last 8 digits of VIN Number**
- **Customer Name**

Strike any key to page through the report detail. Strike the <Enter> key when you have reached the final page to return to the Salesman Number query screen.

## ZM - ZIP Model Detail

### ZIP CODE(S) ...

Type in a "?" at this prompt to display a current listing of zip-codes within your database. Hit the <Enter> key to scroll through the list, and hit the <Control> + X to return to the ZIP CODE(S) ...query screen.

Type in a zip-code (or two-letter state abbreviation) to display a new prompt asking if you would like to display a detail for new cars, used, or both.

### (N)ew (U)sed -or- (B)oth ....

Type in your selection at this prompt. This report is a breakout of the Zip-code Analysis report. The figure below shows a sample report for zip-code 06484

ZIP CODE REPORT HH:MM:SS DD MM YY									
ZIP..	DEAL#..	DATE..	STOCK.....	YR/MAKE/MODEL...	LAST 8..	CUSTOMER NAME.....			
33403	34257	013198	WJ039A1	1989 CHEV 1500	K1134981	HARVEYS AUTO REPAIR INC			
***									
33408	34164	012398	WC076A	1986 MERCE 300SD	GA267826	SADVA MOTORCARS, INC			
***									
33418	33151	01197	VJ082A1	1987 NISS 300ZX	HX213732	WESTERN MASS. AUTO BROKERS, INC.			
***									
34689	90685	100299	919111	1999 530 530-STO	XJA26796	SOPHIA DAMORGINOSR			
***									

**Figure 24 Zip-code Analysis Detail Sample Report**

The following pieces of information are displayed for all transactions made by a particular salesman for a one year period.

Zip-code; Deal Number; Date of Purchase; Vehicle Stock Number; Year, Make & Model of the vehicle; Last 8 digits of VIN Number; Customer Name

Strike any key to page through the report detail. Strike the <Enter> key when you have reached the final page to return to the Zip-code query screen.

# U - User Custom Reports

From the FDA Main Menu, type “**U**” at the prompt to access the User Defined Custom Reports screen, shown in the figure below. This screen allows you to specify different types of information that you may want to produce a report on.

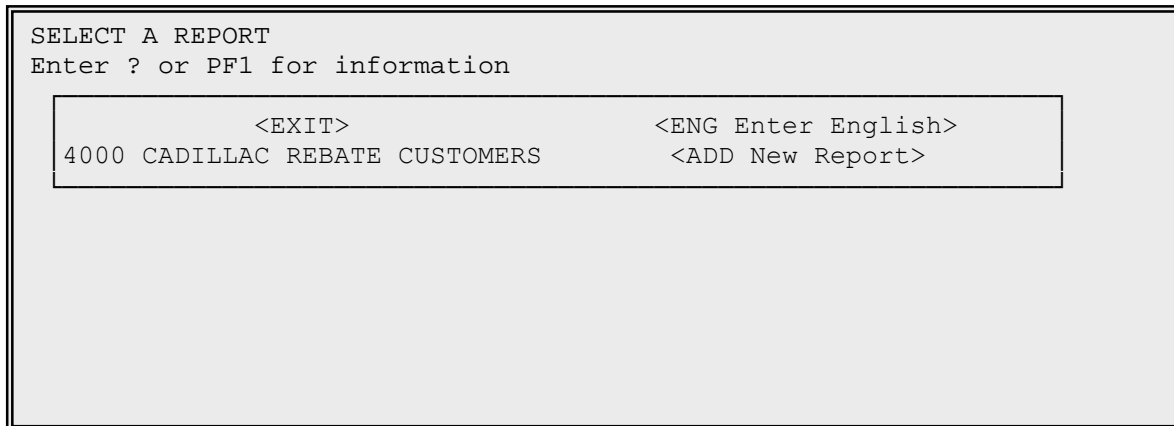


Figure 25 User Defined Reports Screen

# UN – Archive Contracts

The UN command will allow you to restore archived contracts back into the ADP F&I system.

At the FDA Main Menu, type **UN** at the prompt. The application will ask you to enter the contract you wish to restore.

```
(BFDA.DEL)          F D A  UN-ARCHIVING Procedure          DD MM YYYY
Enter Contract to Un-Archive:
PORT 6075          LOGON SB-FI          COMPANY CARINK, INC.
```

**Figure 26 Archive Contracts**

**Enter Contract to Un-Archive:**

Type in the contract number you wish to restore at this prompt, and hit the *<Enter>* key. The program will display a new prompt asking you to verify the command.

**Are you sure this contract is to be UN-ARCHIVED (Y/N)?**

Type in a "Y" to restore the contract back into the ADP F&I system.

# CS – Control Record Setup

In order to economize disk space, the FDA application does not archive all fields from the ADP F&I files. In order to accommodate the user's needs, the FDA application allows you to include ADP fields that are not automatically application included in the FDA backup process. This is done using the Control Record command from the Main Menu.

From the FDA menu type in the menu command "CS" to access the Setup for Control Items screen (shown in the figure below).

```

(BFDA.SETUP)          Setup FDA CONTROL Items          DD MM YY

F ields Setup
O mit Salespeople/Banks
S pecial Fields

Enter Option:

PORT 6069          LOGON SB-FI          COMPANY          CARINK INC.
  
```

Figure 27 Setup for FDA Controls Screen

## *Fields Setup*

### **Enter Option:**

To enter additional types of data in the archive routine, at this prompt, type in "F" and hit the <Enter> key. The screen in the figure below is displayed, with the cursor at the processing prompt in the lower left of the screen.

(BFDA.SETUP)	Setup CONTROL Item Fields	DD MM YY
1.	Gross Profit Purchase	:
2.	Gross Profit Lease	:
3.	User Field Desc #1-Attribute	:
4.	User Field Desc #2-Attribute	:
5.	User Field Desc #3-Attribute	:
6.	User Field Desc #4-Attribute	:
7.	User Field Desc #5-Attribute	:
8.	User Field Desc #6-Attribute	:
9.	User Field Desc #7-Attribute	:
10.	User Field Desc #8-Attribute	:
11.	User Field Desc #9-Attribute	:
12.	User Field Desc #10-Attribute	:
"/" to Clear Field, #, "FI"le, "EX"it :		
Enter Desc & Attribute separated by '-'		
PORT 6069	LOGON SB-FI	COMPANY CARINK INC.

**Figure 28 Field Setup Screen**

**"/" to Clear Field, #, "FI"le, "EX"it :**

At this prompt, type in the line number for which you wish to assign a custom ADP data type. This will send the cursor to that line. Type in the description of the field you want to include in the archive process, space, then type the dash (-) sign, space again, and the appropriate ADP attribute number (refer to your ADP system documentation for this information). If the description is more than one word join these words with an underscore or a period. Hit the <Enter> key when you have completed your entry. Type a period to return to the processing prompt, then type in "FI" at the prompt and hit the <Enter> key to complete the process.

## ***Omit Salespeople/Banks***

**Enter Option:**

To delete data types from the archive routine, at this prompt, type in "O" and hit the <Enter> key. The screen in the figure below is displayed, with the cursor at the processing prompt in the lower left of the screen. The Setup Items to Be Omitted screen (shown in the figure below) is displayed.

```
(BFDA.O)          Setup Items to be omitted          DD MM YY
1) Sales Rep(s) to omit.....:
2) Bank(s) to omit.....:

'FI'le 'D'elete 'EX'it -or- # :
PORT 6069          LOGON SB-FI          COMPANY CARINK INC.
```

Figure 29 Setup Items to Be Omitted Screen

**'FI'le 'D'elete 'EX'it -or- # :**

At this prompt, type in a "1" to omit a Salesperson from the archive process, or a "2" to delete a bank from the archive process. The cursor will move to the appropriate prompt. Type in the number of the item you wish to delete and hit the <Enter> key to send the cursor back to the processing prompt. Type "FI" to save your change and complete the process.

## ***Special Fields***

**Enter Option:**

To add special fields, at this prompt, type in "S" and hit the <Enter> key. The screen in the figure below is displayed, with the cursor at the processing prompt in the lower left of the screen.

(BFDA.S)		Setup Special Fields		DD MM YY
+Cnt	File	Attrib	Description	
1	FI-WIP	10	BUYER SALE	
2	FI-WIP	1	DEAL NUMBER	
3	FI-AUX	5	GM LEASE EXP DATE..	
4	FI-LEASE	20	INSURANCE(1)-TERM..	
5	CAR-INV	5	BODY	
6	COMMON-INV	2	USA COUNTRY	
7	COMMON-INV	4	FLEET	
8				

Enter FI-WIP,FI-AUX,FI-LEASE,COMMON-INV or CAR-INV files or FI=File or EX=Exit  
 FI=File    EX=Exit

**Figure 30 Setup Special Fields**

**Enter FI-WIP, FI-AUX, FI-LEASE or CAR-INV files or FI to file or EX to exit:**

At this prompt, enter the special fields in which you would like to archive.  
 Enter FI-WIP, FI-AUX, FI-LEASE, or CAR-INV for the files.