



# F&I Report Generator (CFRG)



## Quick Reference Card

### Function CFRG

F&I Report Generator (CFRG) produces detailed custom reports from the gross profit data in your F&I deals. Reports generated with CFRG can be used for salesperson commissions, marketing feedback, or any other business purpose.

- The CFRG interface allows you to adjust the sort order, report columns, and data type selection each time you run a report, at your option. Save as many different setups as you need using unique report codes. Then simply change the run dates to get consistent reporting results for the same data types.

### Accessing CFRG

CFRG runs from your F&I (*name-FI*) application account. To run this function, enter **CFRG** at the Function Code prompt, or select the **F&I Report Generator** entry on the CarInk menu (CI).

*The CFRG function code replaces the previous FRG and CI-FRG codes for this application.*

### Main report screen

Use the procedure below to generate the F&I reports.

**Tip.** To adjust the sort options or the report columns used in your default setup, see the next page.

- Log on to your F&I (*name-FI*) application account.
- At the Function Code prompt, enter **CFRG**.
- At the Report Definition field, enter a code for an existing report.

**-OR-**

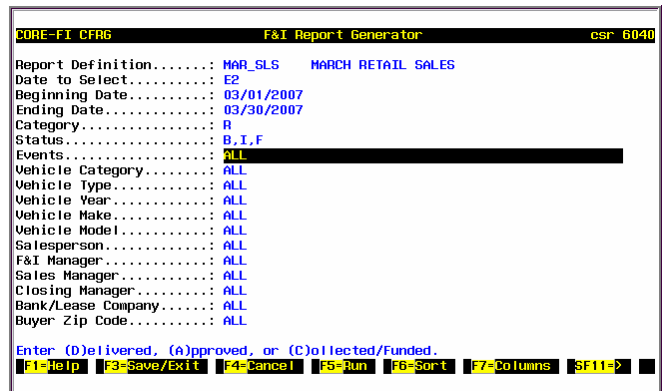
Use the F12=List command key to choose from the defined reports.

**-OR-**

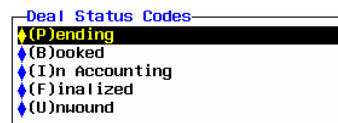
Enter a new report code. The program prompts you to save it. Enter **Y** to proceed.

- Enter a longer description for the selected report.
- At the Date to Select field, use the F12=List key to select the specific date type (from your F&I Work in Process file) to use as the report basis.
- In the two Deal Date fields, enter a valid date for the report range, enter a period ( . ) for the current date, or press **F12** to use the date selection window.
- In the fields below the date range, you can either enter **ALL** or select specific search criteria. For details on a field, use the F1=Help command key.
- After setting the report definition fields, press **F5=Run**.

*For an example of a generated report, see page 3.*



To select deals that match specific criteria, press **F12** to open a selection list. (Example: Deal status)



Use the Up and Down arrow keys to move through the list, and press **Enter** to flag the entries that you want to include. To select or to clear all the entries in the list, press the asterisk key ( \* ).

**Note.** If you know the specific letter codes available in a field, you can enter them directly, separated by commas or spaces.

Press **F3** to return to the main CFRG screen.

## Choosing sort options

DEMO-FI CI-FRG F&I Report Generator csr 6005

Report Definition..... PENDING

Date to Select.....

Beginning Deal Date.....

Ending Deal Date.....

Category.....

Status.....

Events..... ALL

Field To Sort By	Sort Order	Break
SALESPERSON NAME	ASCENDING	PAGE BREAK
VEHICLE CATEGORY	ASCENDING	BREAK
DATE SOLD	ASCENDING	NO BREAK

Available Fields

STOCK NUMBER

DEAL CATEGORY

VEHICLE TYPE

MODEL YEAR

VEHICLE MAKE

VEHICLE MODEL

SALESPERSON NAME

F&I MANAGER NUMBER

<more below>

Use the Up and Down arrow keys or the F9 Search key to find the field you want to add, and then press Enter

- Choose as many as three sort fields.
- To change the sort criteria order, move to the field whose position you want to adjust, and then press either F5 to move the field down in the sequence or F6 to move it up.

Use the F6=Sort command key to define how you want the data in the generated report to be sorted before printing or downloading.

- Open or define a new CFRG report.
- Press F6.
- In the Field to Sort By column, enter the exact name of an F&I deal field, OR press F12 to choose from the list of available fields.
- In the Sort Order field, press A for Ascending or D for Descending.
- In the Break field, press B for Break if you want to set a column break (subtotal) on this sort field. Enter N for No Break, or P for Page Break. For more details on Sort fields, use F1=Help. For downloads, Page Break acts the same as Break.
- Press F3=Exit to save the Sort options.

## Setting up report columns

DEMO-FI CFRG F&I Report Generator csr 6003

Report Definition..... PENDING PEN

Date to Select.....

Beginning Deal Date..... 10/01/2004

Ending Deal Date..... 09/21/2005

Category..... ALL

Status..... P

Events..... ALL

Vehicle Category..... ALL

Vehicle Type..... ALL

Vehicle Year..... ALL

Vehicle Make..... ALL

Vehicle Model..... ALL

Salesperson..... ALL

F&I Manager..... ALL

Desk Manager..... ALL

Closing Manager..... ALL

Bank/Lease Company..... ALL

Buyer Zip Code..... ALL

Report Columns (117 Characters)

DEAL

DEAL CATEGORY

VEHICLE CATEGORY

DEAL STATUS

DATE SOLD

STOCK NUMBER

SALESPERSON

SOLD UN

LAH INS

WARRANT

F&I RES

GAP INS

TOTAL F

GROSS P

GROSS A

GROSS T

Enter the Report Column, or F12=List.

F1=Help F2=Toggle F3=Exit F4=Cancel F5=Mv Dwn F6=Mv Up SF11=>

The print/hardcopy version of each report is limited to 128 characters in width. The Report Columns window title shows the number required by the selected F&I data fields

Use the F7=Report Columns command key to select the data that will appear on the generated report.

- Open or define a new CFRG report.
- Press F7 to display the list of selected columns.
  - To move a column heading to a new position in the list, use the F5 and F6 command keys.
  - To remove a column, press Del at that row.
  - To add a column, press Ins, and then press F12 to choose from the available F&I fields.

Press F2 to switch between column setups for printed reports and downloads (saved separately).

DEMO-FI CI-FRG F&I Report Generator csr 6005

Available Columns

DEAL

VEHICLE TYPE

MODEL YEAR

VEHICLE MAKE

VEHICLE MODEL

ZIP CODE

BUYER NAME

SPLIT SALESPERSON NAME

F&I MANAGER NUMBER

DESK MANAGER NUMBER

CLOSING MANAGER NUMBER

BANK/LEASE COMPANY

SALESPERSON COMMISSION

MBI FEE

LIFE PREMIUM

A&H PREMIUM

Report Columns (117 Characters)

DEAL

DEAL CATEGORY

VEHICLE CATEGORY

DEAL STATUS

DATE SOLD

STOCK NUMBER

SALESPERSON NAME

SOLD UNITS

LAH INSURANCE \$

WARRANTY \$

F&I RESERVE \$

GAP INSURANCE \$

TOTAL F&I \$

GROSS PROFIT SALE \$

GROSS A/P \$

GROSS TOTAL \$

Use arrow Key

F3=Exit

Press F12 to open the Available Columns window and insert (or modify) a report column. To find the field you want, use the Up and Down arrow keys or the F9=Search command key, and then press Enter. Options include dealer fee options 1-10 plus up to 50 options/windows, with both sale and gross amounts

- Press F3=Exit to save the column settings.

## Setting up GAP commission fields

Enter the Beginning Selection Date for the report.  
 DEL=Delete F8=GAP Comm Fields F10=Category Xrefs F12>List SF11=>

**GAP Commission Fields**  
 Purchase 236  
 Lease 251

Use the F8=GAP COMM Fields command key to define which fields in your F&I application are used for GAP sales commissions on purchase or lease deals.

1. Open or define a new CFRG report.
2. Press **F8**.
3. To use field numbers from FI-WIP other than the default values, enter the field number in the Purchase and/or Lease field.
4. Press **F3**.

## Setting up the finance code / deal category cross-reference

DEMO-FI CFAG F&I Report Generator csr 6003

Report Definition..... PENDING PENDING LEASES  
 Date to Select..... E2  
 Beginning Deal Date..... 10/01/2004  
 Ending Deal Date..... 09/21/2005  
 Category..... ALL  
 Status..... P  
 Events..... ALL  
 Vehicle Category..... ALL  
 Vehicle Type..... ALL

Finance Code	Deal Category
DT	W
WHSL	W
MS	W
L	L

To reset the finance code / category cross-reference to its default values, press **F5**

Use the F10=Category Xrefs command key to group your deal finance codes into Retail, Lease, and Wholesale categories. These three categories can be used as selection criteria in the Category field.

*Note: The setup you define with this command applies to all reports on the current F&I application account.*

1. Open or define a new CFRG report.
2. Press **F10**.
3. In the Finance Code column, enter the code for a financing type used in your F&I deals.

**-OR-**

To remove a cross-reference, press **Delete**.

4. In the Deal Category column, enter **R** for Retail, **L** for Lease, or **W** for Wholesale.
5. Press **F3**.

## Example report

Use the arrow keys and the PageUp/PageDn keys to browse the generated report.

To print the report, use the F7 command key.

### In a Reflection session only:

To download the contents of the generated report, press **F8**, then choose from the file options (include sort breaks and column totals, or just the raw report data).

After you make your selection, the program prompts for an Excel file type and filename where you can save the report data.

DEMO-FI CFAG F&I Report Generator csr 6003

DEMO-FI F&I Report - Run on 04/26/2005 at 09:05:22PM  
 Deal Dates 02/07/2005 Through 04/11/2005

F&I Hgr	Deal-T-I-S	Stock#	Sold	LAH	Harr	F&I	Gap	TotF&I	GPSale	A/P	HldBck	CommGr	Profit
	32257 R P		22FEB05	0	0	0	0	0	0	0	0	0	0
	31529 L P	A4478	07MAR05	0	0	0	0	0	0	0	0	0	0
	30752 L N F	1198	17MAR05	0	0	0	0	0	6	6	542	0	6
10	32239 R N B	1237	16FEB05	0	0	7345	0	7345	4049	3849	1154	2695	11394
10	32243 R N B	1238	16FEB05	0	0	7740	0	7740	573	373	1346	-2021	8313
10	32238 R N B	1242	16FEB05	0	0	9532	0	9532	2773	2573	0	3573	12305
10	32244 R N B	1340	16FEB05	0	0	11913	0	11913	4695	4495	0	4495	16608
10	32240 R N B	1343	16FEB05	0	0	13478	0	13478	1796	1596	0	1596	15274
10	32241 R N B	1345	16FEB05	0	0	9532	0	9532	3103	2903	0	2903	12636
10	32245 R N B	1347	16FEB05	0	0	14054	0	14054	5540	5340	0	5340	19594
10	32246 R N B	1348	16FEB05	0	0	8008	0	8008	2047	1847	0	1847	10055
10	32242 R N B	1712	16FEB05	0	0	0	0	0	0	-200	768	3025	0
10	32233 R N B	646465	16FEB05	0	0	7746	0	7746	573	373	1346	-973	8319
10	32235 R N B	C	16FEB05	0	0	9094	0	9094	2402	2202	1442	759	11495
10	32236 R N B	D	16FEB05	0	0	9094	0	9094	2402	2202	1442	759	11495

Use Arrow Keys to Navigate, or Press a Function Key As Described Below.  
 F1=Help F3=Exit F7=Print F8=Download F9=Search