



## Quick Reference Card

### Function CI-CSD

The F&I Combining Sales Commission (CI-CSD) application generates an individual report of salesperson commission figures (to be paid) on deals that have been split among two or three sales associates.

- CI-CSD provides a detail report listing deal gross figures, with separate pages showing only a single salesperson's portion for each deal's commission.
- The CSD Setup feature of the CI-CSD application allows you to define which F&I fields in the Gross screen of the F&I deal are applicable to your dealership's commission breakout arrangement.

*Note: To use the F&I Combining Sales Commission application effectively, you must update the salesperson's commission breakout in the Gross screen in each F&I deal as the deals are generated.*

### Using CI-CSD

Function CI-CSD runs from your *name-FI* application account.

### Setting up the F&I Gross fields

To define the F&I fields that are to be included in the commission report:

1. Log on to your F&I (*name-FI*) application account.
2. At the Function Code prompt, enter **CI-CSD**.
3. At the CI-CSD menu, enter **1** for CSD Setup.
4. At each field in the screen, press the **spacebar** to switch between settings of Y for Yes or N for No.

For a longer description of each field, move to that field and press **F1=Help**.

Choose Y if you want the field description to be included in calculations of split commissions for salespersons on this F&I application account, or choose N if you do not.

**Tip.** To move between fields, use the Enter key or the four arrow keys.

5. After setting each field to Y or N, press **F3=Save/Exit**.
6. Choose the **Save changes** option.
7. At the CI-CSD menu, enter **EX** to return to the Function Code prompt on your F&I account.

DEMO-FI CI-CSD		F&I Gross Calculation Setup		csr 6004
Finance Reserve:N	Credit Life:N	Accident & Health:N		
Backend We Oues:N	MBI.....:Y			
Fee Option 1.....:N	Fee Option 2.....:N	Fee Option 3.:N		
Fee Option 4/Initial Fee 1:N	Fee Option 5/Initial Fee 2:N			
Fee Option 6/Add to Cap 1.:N	Fee Option 7/Add to Cap 2.:N	Fee Option 10:N		
Fee Option 8.....:N	Fee Option 9.....:N			
Insurance 1:N	Insurance 2:N	Insurance 3:N		
Initial Fee 3:N	Add to Cap 3:N			
Initial Fee 4:N	Add to Cap 4:N			
Include Surplus Cash in Commission Gross Calculation:Y				
Include Salesperson 2:Y				
Include Salesperson 3:Y				
Include "Y" or "N". Press SPACEBAR to toggle between Y and N.				
F1=Help F3=Save/Exit				

# Generating the Commission Report

```

Function Defaults uTil exit
csr          User Security Menu          csr 6004
Account: DEMO-FI
Function Code: CI-CSD
    
```

```

DEMO-FI CI-CSD          CI-CSD          csr 6004

Report by (S)old date or
(F)inalized date :      S

Enter Beginning Date .....:
Enter Ending Date .....:
Enter (S)ummary or (D)etail:
Enter Salesperson Number...:
Printer .....:

Enter "S", "F", <RETURN> for default or "E"xit.
    
```

## Detail report example

Commission Log Report - Detail by Sold Date for 1-1 to 7-31-05  
 Run: 12:12:04 21 JUL 2005  
 Salesperson: 1120 LIESSE,ERIN

BUYER NAME	N	SOLD	P	STOCK	YEAR	MAKE	MODEL	C/T	OTHER SALES	# OF UNITS	COMMISSION GROSS	F&I GROSS	COMMISSION
HEARDON, STEVE	N	01-04-05	P	2166	03	PONT	GRANDP	C		1	23120	4215	5780
POLL, KEVIN SCOT	N	01-06-05	L	1718	02	FORD	EXP	MP		71	1826	238	1216
POLL, KEVIN SCOT	N	02-16-05	P	0	00	BMW	528	C		1	759	9094	1554
BLUICK, HARRY A	N	06-13-05	P	1856	00	TOYO	SIEM			1	3040	6873	760
BLUICK, HARRY A	N	06-28-05	P	1854	00	TOYO	480N	MP		1	3209	7800	802
BRAY, GARY	N	07-21-05	L	1190	00	HVAC	ELAN	C		71	1	0	0
UNIT TOTALS:										5.5	31960	26620	10102
REP TOTALS:										5.5	31960	26620	10102

Unit sales for which a commission is split are shown in decimals (tenths)

## Summary report example

Commission Log Report - Summary by Sold Date for 1-1-04 to 12-30-04  
 Run: 23:53:45 31 DEC 2004  
 PAGE: 1

SALESPERSON	NEH	USED	# OF UNITS	COMMISSION GROSS	AVERAGE GROSS	F&I GROSS	COMMISSION
1120 LIESSE, ERIN	15.3	0	15.3	278699	17692	4270	82080
71 CLENSALE, STAN	13.3	0	13.3	39386	2961	3270	7812
UNKNOWN	8	0	8	4777	597	1500	1800
1221 CRATER, DEBORAH	4.3	0	4.3	-23877	-5553	4250	-6921
900 EVANS, ANELIA	1	0	1	-45994	-45994	980	-11498
80 FALLS, VICTOR	1	0	1	3800	3800	1500	950
82 LOOP, KRISTI	1	0	1	3809	3809	1500	952
950 ZAMBITO, PASCAL	1	0	1	18996	18996	0	6319
TOTALS:	44.9	0	44.9	271526	6047	17270	82802

To create the report of individual salesperson commissions:

1. Log on to your F&I (*name*-FI) application account.
2. At the Function Code prompt, enter.
3. At the CI-CSD menu, enter **2** for CSD Report.
4. Enter **S** to sort the report by vehicle sold-date or **F** to sort by deal-finalize date.
5. Enter the starting and ending dates in the range for the report. Use a MM-DD-YYYY format.
6. Enter **S** for a summary version of the report, or **D** for a detail version.
7. At the Salesperson Number field, enter **ALL** to run the report for all salespersons on this F&I account.

-OR-

To select an individual salesperson, enter his or her number here.

-OR-

Enter **?** (question mark) to display a list of salespersons, review the list to find the entry you want, and then press **Enter** to select that salesperson.

8. At the Printer field, enter **Y** to send the report to a system printer, **N** to send the report to the screen, or **S** to send the report to an attached slave printer.
9. (Screen output only) Review the report using the command keys listed on the screen. Press **F3** to exit.
10. From the CI-CSD menu, enter **EX** to return to the Function Code prompt on your F&I account.

Note that by default, the CI-CSD report includes all deals (and not just deals that have a Right Relationship 360 sale type). *Some custom implementations of CI-CSD may vary from this default.*