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## User Guide

## F&I Menu Selling

FMS-SETUP

## Notes

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**Notes**

# Introduction

The F&I Menu Selling application extends the basic features of your ADP standard F&I product by allowing you to manage and optimize your sales of extended warranty plans, mechanical breakdown insurance, and other types of optional packages that your customers may wish to add to their vehicle deals.

F&I Menu Selling allows you to create sales regions for various products and product groups (packages), selected by applicable make, model, and type of deal. The application provides a comprehensive setup program for defining each product, package, and regional sales hierarchy.

Once you have begun using the Menu Selling program, the deal screens in the F&I application allow you to offer specific packages to your customers based on what type of vehicle they are buying or leasing and where they are buying or leasing it. The program setups take care of the details by adding the appropriate calculations to the deal process.

## Overview

This guide provides information for accessing, setting up, and using the features of the F&I Menu Selling application.

For instructions on working with defined Menu Selling packages and products within F&I, see *Using Menu Selling in the F&I Application* on page 25.

## Navigation

- Make sure that the Caps Lock feature is on.
- Use the arrow keys to move between fields.
- After typing data into a field, press **Enter** to move to the next field.
- Use **F1** to view the extensive online help.

## Setting Up F&I Menu Selling - Overview

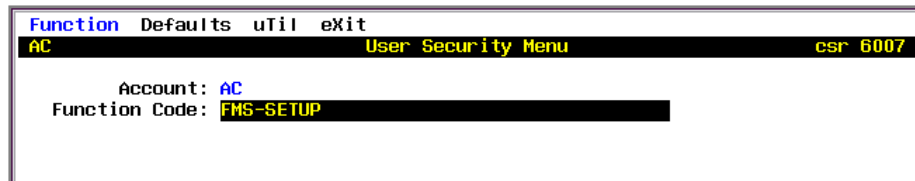
The FMS-SETUP options allow you to customize F&I Menu Selling to best fit the needs of your dealership.

Refer to the appropriate section in the table below to set up the components of the Menu Selling program.

<b>To set up ...</b>	<b>See ...</b>
Your sales hierarchy (stores and regions) where specific insurance packages are assigned	<i>Defining Stores and Regions</i> on page 4
Program/screen filenames and other technical information for product definitions	<i>Defining Product Types</i> on page 14
MBI/extended service products	<i>Defining F&amp;I Menu Selling Products</i> on page 17
Packages (for making product selections in F&I)	<i>Defining Packages</i> on page 21

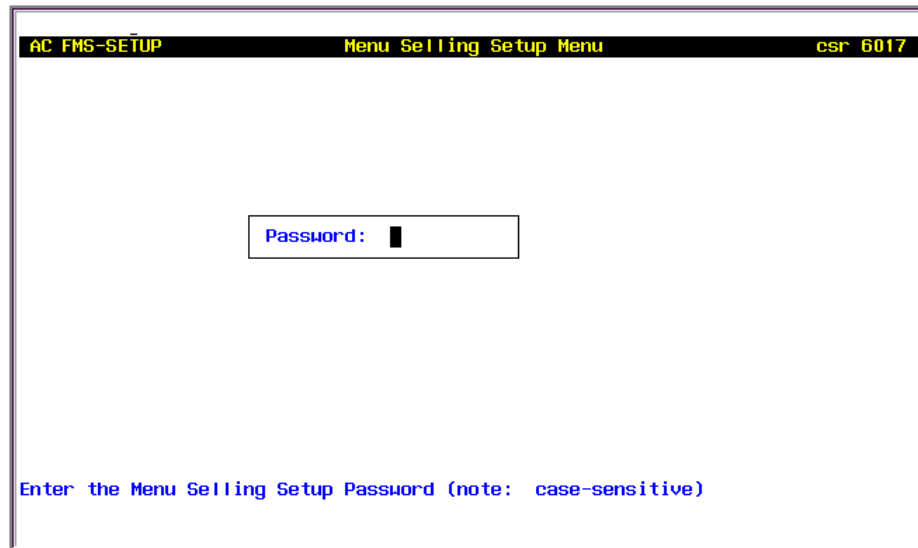
## Accessing FMS-SETUP

Follow these steps to access the F&I Menu Selling setup program from the User Security Menu.



**Figure 1. Application Account and FMS-SETUP Function Code**

1. Log on to your AC account.
2. At the Function Code field, enter **FMS-SETUP**.

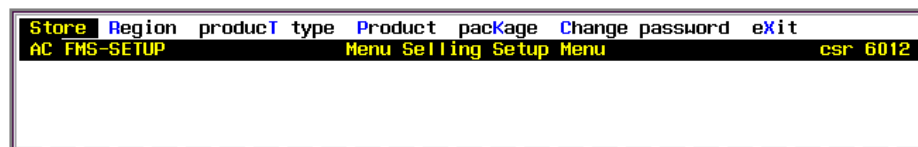


**Figure 2. Password Entry Screen**

3. Enter the password for the F&I Menu Selling setup program.

*Note.* This password can be modified using the *Change Password* command on the main menu. See *Changing the FMS-SETUP Password* on page 24.

4. At the setup menu, choose the option for the task you want to perform.



**Figure 3. FMS-SETUP Menu**

## Defining Stores and Regions

The F&I Menu Selling application is designed to organize your F&I logons into sales regions, where only the applicable product packages are sold. Each logon can be set up to correspond to a *store* for Menu Selling purposes, and stores can be grouped into higher and lower regions as appropriate for your organization.

At a minimum, you must create one store and one region in the Menu Selling setups. The region hierarchy you create can be as simple or as detailed as your business operations require. Any region you create can either have *subregions* assigned to it, or can have one or more stores assigned to it. You cannot assign both a store and a subregion to any given region.

### Defining a Store

To create an F&I Menu Selling store:

1. Follow the steps in *Accessing FMS-SETUP* on page 2 to reach the F&I Menu Selling main menu.
2. Select the **Store** option.

Figure 4. Store Setup Screen

3. At the Store field, enter the name of an F&I application account (*name-FI*).  
-OR-  
Press **Shift-F12=Logons** to open the list of F&I application accounts on your system.



Figure 5. F&I Logon Selection List

Press **Enter** to choose a logon from the available list and return to the setup screen.

- At the Store Name field, enter a short description of this store.

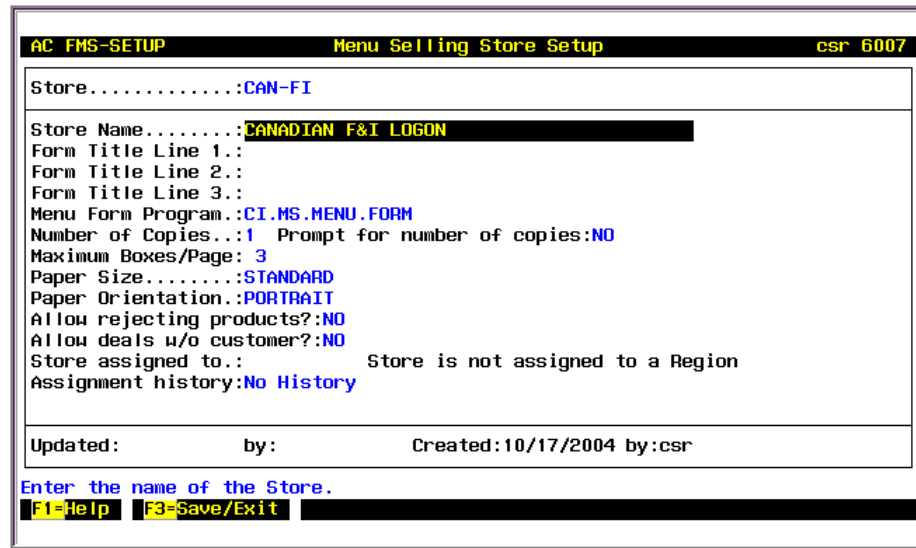


Figure 6. Unassigned Store Record

- Enter up to three lines for the form title of Menu Selling selections made for this store. The lines entered here appear as a description on forms printed when Menu Selling products are added to deals in F&I.
- At the Menu Form Program field, press **Enter** to keep the default value (do not change the program name unless instructed to do so by Car!nk support personnel).
- Enter the number of copies of each selected Menu Selling form to print during the sale process.
- At the Prompt for Number of Copies field, press the **spacebar** to switch between values of Yes and No. Choose YES if you want the program to allow the user to change the number of form copies to print, or NO to force exactly the number entered in the previous field.
- At the Maximum Boxes/Page field, enter the maximum number of boxes (columns) to print across a page of the Menu Selling form.
- At the Paper Size field, press the **spacebar** to switch between the options for STANDARD and LEGAL.

11. At the Paper Orientation field, press the **spacebar** to switch between the options for PORTRAIT and LANDSCAPE.
12. At the Allow Rejecting Products field, press the **spacebar** to switch between values of Yes and No. Choose YES if you want the program to allow F&I manager users to be able to reject a product within a package, or NO if you don't.
13. At the Allow Deals W/O Customer field, press the **spacebar** to switch between values of Yes and No. Choose YES if you want the program to allow users to make Menu Selling selections within F&I deal screens when no customer has been selected.
14. Press **F3=Save/Exit**, and then select the **Save changes** option.

The Assignment History field contains a list of regions to which the store has been assigned. This field is populated only after the new store record has been assigned in the Region Setup screen.

## Updating a Store Record

To modify an existing store record:

1. Follow the steps in *Accessing FMS-SETUP* on page 2 to reach the F&I Menu Selling main menu.
2. Select the **Store** option.
3. At the Store field, enter the logon name of a store that has already been defined.

**-OR-**

Press **F12=List** to open the list of existing store setups.

Store	Description	Region	Status
CAN-FI	CANADIAN F&I LOGON		VOIDED
CORE-FI	TRUCK SALES	FREDDYS	
DEMO-FI	DEMO FI		
TEST-FI	BEACHES DISTRICT SALES	FTLAUD	

**Figure 7. Store Selection List**

Use the Up and Down arrow keys, or the **F9=Search** command key, to find the store you want, and then press **Enter** to select it.

4. The program displays the existing store record.

AC FMS-SETUP Menu Selling Store Setup csr 6007

Store.....:DEMO-FI

Store Name.....:DEMO-FI

Form Title Line 1.:LESCHERICK HONDA

Form Title Line 2.:FINANCIAL SERVICES OVERVIEW

Form Title Line 3.:

Menu Form Program.:CI.MS.MENU.FORM.1

Number of Copies.:1 Prompt for number of copies:NO

Maximum Boxes/Page: 4

Paper Size.....:STANDARD

Paper Orientation.:PORTRAIT

Allow rejecting products?:NO

Allow deals w/o customer?:YES

Store assigned to.:DEMO-FI DEMO-FI

Assignment history:History

Updated:10/15/2004 by:csr Created:06/29/2004 by:csr

Enter the name of the Store.

F1=Help F3=Save/Exit SF8=Delete

Figure 8. Store Setup Screen (example data)

Follow steps 4 through 13 in the *Defining a Store* section (starting on page 4) to enter or change the data in the store record.

- At the Assignment History field, press **F2=Detail** to view the list of regions to which this store has been assigned, and the dates of assignment.

*Note.* A store can only be assigned to one region at a time, and you cannot set or modify the assignment in this window. The History detail window acts as an audit feature for each store record.

AC FMS-SETUP Menu Selling Store Setup csr 6021

Store.....:DEMO-FI

Store Name.....:DEMO-FI

Form Title Line 1.:LESCHERICK HONDA

Region	Date added	User	Date removed	User
DEMO-FI	07/09/2004	csr		

Figure 9. Store Assignment History Detail Window

To find specific text strings within the history data, use the **F9=Search** command.

To close the detail window, press **F3**.

- At the Store Setup screen, press **F3=Save/Exit**, and then select the **Save changes** option.
- Press **F3** again to return to the FMS-SETUP menu.

### Deleting a Store

To remove a store record:

- From the F&I Menu Selling main menu, select the **Store** option.

2. Press **F12=List** to open the list of existing store setups, and then select the store record you want to remove.
3. Press **Shift-F8=Delete**.
4. At the confirmation prompt, enter **Y** to proceed with the delete command.
5. Press **F3** to return to the main menu.

## Defining a Region

To create a sales region for F&I Menu Selling purposes:

1. Follow the steps in *Accessing FMS-SETUP* on page 2 to reach the F&I Menu Selling main menu.
2. Select the **Region** option.

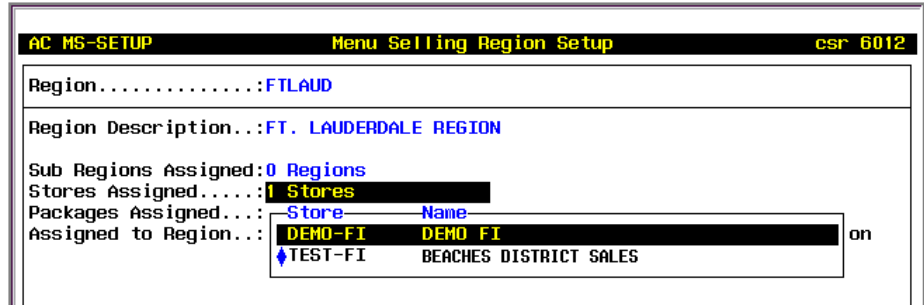
Figure 10. Region Setup Screen

3. At the Region field, enter a new shorthand name for the region you are defining. Note that the name cannot contain any spaces.
4. Enter a longer description for the new region.
5. If you want to assign one or more subregions to the new region:
  - a. At the Sub Regions Assigned field, press **F12=List**.

Region	Description
FREDDYS	FREDDYS ONE STORE MASTER AND S
NATIONAL	NATIONAL REGION

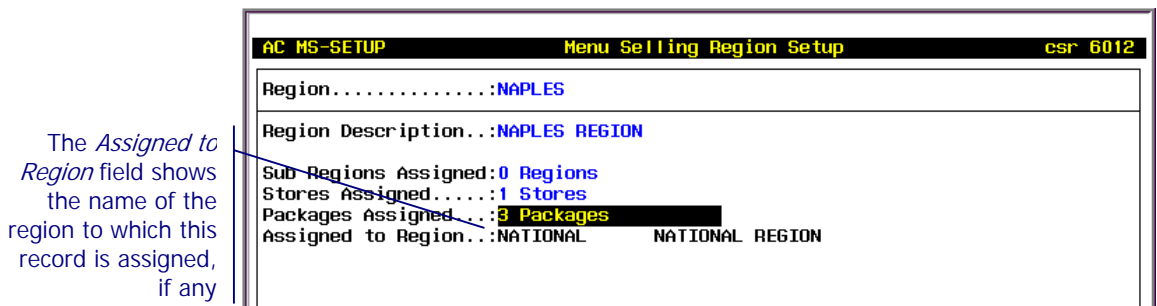
Figure 11. Sub Region Assignment Dialog Box

- The dialog box displays the names of unassigned regions that are defined within the F&I Menu Selling application.
- b. Use the Up and Down arrow keys to move to the regions you want to assign to the new region as subregions, and then press **Enter** to select each one. You can also press the asterisk key ( \* ) to select all the entries in the list. To find a particular entry in the list, use the F9=Search command key.
  - c. When you have selected the regions you want to assign, press **F3=Exit**.
6. If you want to assign stores to the region (instead of subregions):
- a. At the Stores Assigned field, press **F12=List**.



**Figure 12. Store Assignment Dialog Box**

- The dialog box displays the logons and names of unassigned store records.
- b. Use the Up and Down arrow keys to move to the stores you want to assign to the new region, and then press **Enter** to select each one. You can also press the asterisk key ( \* ) to select all the entries in the list. To find a particular entry in the list, use the F9=Search command key.
  - c. When you have selected the stores you want to assign, press **F3=Exit**.



**Figure 13. Region Setup - Example**

7. To assign packages to the new region, see *Assigning Packages to a Region* on page 12.
8. When you are done setting up the new region, press **F3=Save/Exit** at the main setup screen.
9. Select the **Save changes** option, and then press **F3** again to return to the FMS-SETUP menu.

## Updating a Region

To modify an existing region record:

1. Follow the steps in *Accessing FMS-SETUP* on page 2 to reach the F&I Menu Selling main menu.
2. Select the **Region** option.
3. At the Region field, enter the name of a region that has already been defined.

**-OR-**

Press **F12=List** to open the list of existing region setups.

Region	Description	In Region	Status
FREDDYS	FREDDYS ONE STORE MASTER AND S		
FTLAUD	FT. LAUDERDALE REGION		
MIAMI	MIAMI REGION		NATIONAL
NAPLES	NAPLES REGION		NATIONAL
NATIONAL	NATIONAL REGION		
SOUTHEAST	SOUTHEAST USA		NATIONAL

Updated:                    by:                    Created:                    by:

Choose a Region and press <ENTER>

F1=Help   F3=Exit   F9=Search

**Figure 14. Region Selection List**

Use the Up and Down arrow keys, or the F9=Search command key, to find the region you want, and then press Enter to select it. The program displays the existing region record.

AC MS-SETUP		Menu Selling Region Setup		csr 6012	
Region.....:FTLAUD					
Region Description...:FT. LAUDERDALE REGION					
Sub Regions Assigned:0 Regions					
Stores Assigned.....:1 Stores					
Packages Assigned....:5 Packages					
Assigned to Region..: Region is not assigned to another Region					
Updated:07/08/2004 by:csr					
Created:05/18/2004 by:csr					
Enter a Region Description.					
F1=Help		F3=Save/Exit		SF8=Delete	

**Figure 15. Region Setup Screen (example data)**

4. Enter or revise the region description as necessary.
5. To update the subregions assigned to the current region, refer to step 5 in *Defining a Region* on page 8.
6. To update the stores assigned to the region, refer to step 6 in *Defining a Region* on page 8.

*Note.* Remember that you cannot assign both a subregion and a store to a given region.

7. To assign packages to the new region, see *Assigning Packages to a Region* on page 12.
8. When you are done modifying the region, press **F3=Save/Exit** at the main setup screen.
9. Select the **Save changes** option, and then press **F3** again to return to the FMS-SETUP menu.

### Deleting a Region

To remove a region from your group of setups:

1. From the F&I Menu Selling main menu, select the **Region** option.
2. Press **F12=List** to open the list of existing region setups, and then select the region record you want to remove.
3. Press **Shift-F8=Delete**.
4. At the confirmation prompt, enter **Y** to proceed with the delete command.
5. Press **F3** to return to the main menu.

## Assigning Packages to a Region

Insurance packages are assigned to your F&I Menu Selling regions, not to your specific F&I application accounts (stores). This method allows you to sell the appropriate packages in all the stores assigned to the region where each particular package has been assigned.

A package can be assigned to more than one region. Generally, you will want to set up your package assignments to match the full range of products that can be sold in each region of your sales hierarchy. If you assign a package to a high-level region, all the subregions and stores below it will have it available to sell during vehicle deals (depending on the package restrictions, such as the vehicle make and whether the deal is a purchase or a lease).

To define all the packages that can be sold in your organization, see *Defining Packages* on page 21.

To assign packages to a region:

1. Follow the appropriate procedure (*Defining a Region* on page 8 or *Updating a Region* on page 10) to create or open the region record.
2. Move to the Packages Assigned field.
3. Press **F12=List** to open the package assignment window.

Package	Description	Status
BLUE	COMPOSITE ALL-TERRAIN PACKAGE	
BRONZE	BRONZE PACKAGE	
♦ GOLD	GOLD PACKAGE	
SILVER	SILVER PACKAGE	

Updated: 06/18/2004 by: csr      Created: 06/18/2004 by: csr

Select/De-Select a Package by pressing <ENTER>, or press \* for all

F1=Help   F3=Exit   F9=Search

**Figure 16. Package Selection Window**

4. Use the Up and Down arrow keys to move to the package names you want to assign to the region, and then press **Enter** to select each one. To clear a selection, press **Enter** again.  
You can also press the asterisk key ( **\*** ) to select all the entries in the list.  
To find a particular entry in the list, use the **F9=Search** command key.
5. When you have selected (flagged) all the packages you want to assign, press **F3=Exit** to return to the Region Setup screen.

## Reordering Packages

To change the order in which packages are presented in the Menu Selling screen(s) for F&I deals made through this store:

1. Open a region record that has at least two packages assigned to it.
2. Press **F5=Re-Order Packages** to open the Package window.
3. Use the Up and Down arrow keys to move to the package you want to move to a new place in the list, and then press **Enter** to select it.
4. Press Up or Down again to move the selection, and then press **Enter** to change its position.
5. Press **F3=Exit** to return to the Region Setup screen.

*Note.* Changing the Package order in this window also changes the order in which the Menu forms print during F&I deals.

## Defining Product Types

The Product Type Setup screen provides you with a way to specify which programs are used for each product during the F&I sales process. The product types in F&I Menu Selling correspond to the F&I product definitions (within the F&I application) such as MBI, Insurance 1, Insurance 2, Fee Option 1, and so on.

*Note.* Typically, this menu option is run only by ADP installation/support personnel, or by specialized dealership staff. Check with your support representative before changing any settings defined here.

To set up product types:

1. Follow the steps in *Accessing FMS-SETUP* on page 2 to reach the F&I Menu Selling main menu.
2. Select the **Product Type** option.

The screenshot shows a terminal-style window titled "AC MS-SETUP Menu Selling Product Type Setup csr 6008". The main content area has several labels: "Product Type..:" followed by a blacked-out field, "Description...:", "Screens.....:", and "Default Screen:". Below this is a section for "Updated:" and "by:" followed by "Created:" and "by:". At the bottom, a blue prompt reads "Enter a Product Type. F12=List for a list of available product types." and a black bar contains the function key shortcuts: "F1=Help", "F3=Save/Exit", and "F12=List".

**Figure 17. Product Type Setup Screen**

3. At the Product Type field, press **F12=List**.
4. Select either the Purchase or Lease option. The program displays a list of defined product type codes, along with their descriptions and current status.

AC MS-SETUP Menu Selling Product Type Setup csr 6007		
Product Type	Description	Status
PUR*FEE.01	PURCHASE FEE/OPTION 1	
PUR*FEE.02	PURCHASE FEE/OPTION 2	
PUR*FEE.03	PURCHASE FEE/OPTION 3	
PUR*FEE.04	PURCHASE FEE/OPTION 4	
PUR*FEE.05	PURCHASE FEE/OPTION 5	
PUR*FEE.06	PURCHASE FEE/OPTION 6	
PUR*FEE.07	PURCHASE FEE/OPTION 7	
PUR*FEE.08	PURCHASE FEE/OPTION 8	
PUR*FEE.09	PURCHASE FEE/OPTION 9	
PUR*FEE.10	PURCHASE FEE/OPTION 10	
PUR*INS.01	PURCHASE INSURANCE 1	
PUR*INS.02	PURCHASE INSURANCE 2	
PUR*INS.03	PURCHASE INSURANCE 3	
PUR*MBI	PURCHASE MBI	
PUR*WEOWE	PURCHASE WE OWE	

Updated:                    by:                    Created:                    by:

Choose a Product Type and press <ENTER>

F1=Help   F3=Exit   F9=Search

Figure 18. Product Type Selection List

- Use the Up and Down arrow keys or the F9=Search command key to find the entry you want to modify, and then press **Enter**.

AC MS-SETUP Menu Selling Product Type Setup csr 6008		
Product Type...	PUR*FEE.01	
Description...	PURCHASE FEE/OPTION 1	
Screens.....	1 Custom Screens	
Default Screen:	CI.MS.MENU.PUR.MBI	
Updated: 06/02/2004 by: csr                    Created: 07/15/2004 by: csr		
Enter a description of the product type.		
F1=Help   F3=Save/Exit   SF8=Delete		

Figure 19. Product Type Setup Screen (example data)

- At the Description field, enter a simple description for what this type code covers.
- At the Screens field, press **F12=List**. Use the selection list to select one or more screens that apply to the product type, and then press **F3**.
- At the Default Screen field, press **F12=List** to select the filename for the product type's main program screen.
- Press **F3=Save/Exit** and then select the **Save changes** option.

## Deleting a Product Type

To clear the settings for a defined product type:

1. From the F&I Menu Selling main menu, select the **Product Type** option.
2. At the Product Type field, use the F12=List command key to select the product type code you want to clear.
3. Press **Shift-F8=Delete**.
4. At the confirmation prompt, enter **Y** to proceed with the delete command.  
The program clears the product type record of all settings and marks it in the list of type codes as 'VOIDED.'
5. To return to the setups menu, press **F3=Exit**.

## Defining F&I Menu Selling Products

Each insurance or extended warranty plan you sell must be defined in your setups as a product. A *product* is simply a purchasable plan, optional feature, or other type of add-on that you want to present to customers to attach to their vehicle deal.

Products are organized into *packages*, which are assigned to your sales hierarchy by region.

- To set up packages, see *Defining Packages* on page 21.
- To assign packages to sales regions, see *Assigning Packages to a Region* on page 12.

### Defining a Product

To create or update a setup for a simple product without any variants:

1. Follow the steps in *Accessing FMS-SETUP* on page 2 to reach the F&I Menu Selling main menu.
2. Select the **Product** option.

Figure 20. Product Setup Screen

3. At the Product field, enter the code you want to use to define a new product.

**-OR-**

To edit an existing product definition, enter the code here.

**-OR-**

Press **F12=List** to select a product definition from those already defined on the system.

AC FMS-SETUP		Menu Selling Product Setup		csr 6021
Product	Description	Price-Status		
CLAH	FAMILY PROTECTION BENEFIT	TBD		
GAP	GUARANTEED AUTO PROTECTION	495.00		
LOJACK	RECOVERY SYSTEM	TBD		
MAINT	MAINTENANCE	TBD		
TWG	TIRE & WHEEL GUARANTEE	TBD		
VPP	VEHICLE PROTECTION PRODUCT	299.00		
USC	VEHICLE SERVICE CONTRACT	TBD		

Effective Date...:  
 Expiration Date...:  
 PUR Product Type...:  
 PUR Screen ID...:  
 LSE Product Type...:  
 LSE Screen ID...:

Updated:                    by:                    Created:                    by:

Choose a Product and press <ENTER>

F1=Help   F3=Exit   F9=Search

Figure 21. Product Selection List

Use the Up and Down arrow keys or the F9=Search command key to find the listing you want, and then press **Enter** to select it.

4. The Product Setup screen manages all the product characteristics within the main setup screen.

AC FMS-SETUP		Menu Selling Product Setup		csr 6021
Product.....:CLAH				
Description.....:FAMILY PROTECTION BENEFIT				
Full Description:Credit life insurance pays off the installment loan contract				
Suggested Price..:	TBD	Valid Car Makes....:	All Makes	
Minimum Price...:		Valid Stock Types...:	All Car Types	
Maximum Price...:		Purchase/Lease....:	BOTH	
Dealer Cost.....:		Valid for Cash Deal:	YES	
Effective Date...:	10/12/2004			
Expiration Date..:				
PUR Product Type:	PUR*CLAH	PURCHASE CL/AH		
PUR Screen ID...:	CI.MS.PUR.CLAH			
LSE Product Type:	LSE*CLAH	LEASE CL/AH		
LSE Screen ID...:	CI.MS.LSE.CLAH			
Updated:10/12/2004 by:csr		Created:10/12/2004 by:csr		
Enter a description of the product.				
F1=Help   F3=Save/Exit   F8=Delete				

Figure 22. Product Setup Screen (example data)

At the Description field, enter a short title for the product, as it will be presented to the customer and printed on forms.

5. At the Full Description field, press **F2=Detail**. Use the expanded text-entry window to type a complete description of the product.

*Note. This description is also printed on forms for the customer.*

6. At the Suggested Price field, enter the retail price charged for the product. Press **Enter** at this field to set a value of 'TBD' for any product whose price is to be determined at the time of the deal.

*Note.* Use the TBD value for any product for which the user must look up or select specific data to define the exact coverage, such as deductibles and terms for an insurance product.

7. At the Minimum Price field, enter the minimum cost to the customer for the offered product. (Leave this field blank if there is no price range or scale for the product.)
8. At the Maximum Price field, enter the highest charge for the offered product. (Leave this field blank if there is no price range or scale for the product.)
9. At the Dealer Cost field, enter the cost of the product to the dealership.
10. At the Effective Date field, enter the date the product takes effect. For the current (today's) date, press the period key ( . ).
11. At the Expiration Date field, enter the date the product expires. Leave this field blank if the product applies indefinitely or does not otherwise have an expiration date.
12. At the Valid Car Makes field, use the F12=List command key to open a selection list and choose each make of vehicle to which the package applies. To choose all makes, enter **ALL**.
13. At the Valid Stock Types field, use the F12=List command key to open a selection list (New, Used, Demo, etc.) of car types. Press **Enter** at each one to which the package applies. To choose all types of vehicle, enter **ALL**.
14. At the Purchase or Lease field, enter **P** if the package applies only to purchase deals, **L** for lease deals, or **B** for both purchase and lease deals.
15. At the Valid for Cash Deal field, press the **spacebar** to switch between values of Yes and No. Choose YES if you want the product to be applicable to cash vehicle sales, or NO if not.
16. At the PUR Product Type field, type the filename for the product type to use for this product when it is attached to purchase deals, or use the F12=List command key to select a filename from the selection list.
17. At the PUR Screen ID field, type the filename of the program screen to use when working a sale for this product as part of a purchase deal, or use the F12=List command key to select a filename from the selection list.
18. At the LSE Product Type field, type the filename for the product type to use for this product when it is attached to lease deals, or use the F12=List command key to select a filename from the selection list.
19. At the LSE Screen ID field, type the filename for the product type to use for this product when it is attached to lease deals, or use the F12=List command key to select a filename from the selection list.
20. To save your new or updated product record, press **F3=Save/Exit**, and then choose the **Save Changes** option.

## Deleting a Product

To void an entry on the product list:

1. From the F&I Menu Selling main menu, select the **Product** option.
2. Press **F12=List** to open the list of product definitions, and then select the product record you want to void.
3. Press **Shift-F8=Delete**.
4. At the confirmation prompt, enter **Y** to proceed with the delete command.
5. Press **F3** to return to the main menu.

***Note.** Using the Delete command leaves the product entry on both lists of defined products, but marks the entry as 'VOIDED'. To re-use the product definition code, open the record in either product setup screen and enter the data again.*

## Defining Packages

The products you define in F&I Menu Selling are grouped into packages for purposes of offering them to vehicle sales customers. Packages can be set up for particular vehicle makes and sale types and can also be controlled by the type of deal (purchase or lease).

Each factor in the setup of a particular package allows the F&I program to offer only the appropriate packages for the vehicle specified in a deal.

To create or update a Menu Selling package:

1. Follow the steps in *Accessing FMS-SETUP* on page 2 to reach the F&I Menu Selling main menu.
2. Select the **Package** option.

Figure 23. Package Setup Screen

3. At the Package field, enter the code you want to use to define a new package.

**-OR-**

To edit an existing package definition, enter the code here.

**-OR-**

Press **F12=List** to select a package definition from those already defined on the system.

Package	Description	Status
BLUE	BLUE PACKAGE	
BRONZE	BRONZE PACKAGE	
GOLD	GOLD PACKAGE	
SILVER	SILVER PACKAGE	

Figure 24. Package Selection List

Use the Up and Down arrow keys or the F9=Search command key to find the package name you want, and then press **Enter** to select it.

4. The Package Setup screen manages the list of selected products and the types of vehicles and deals to which the whole package applies.

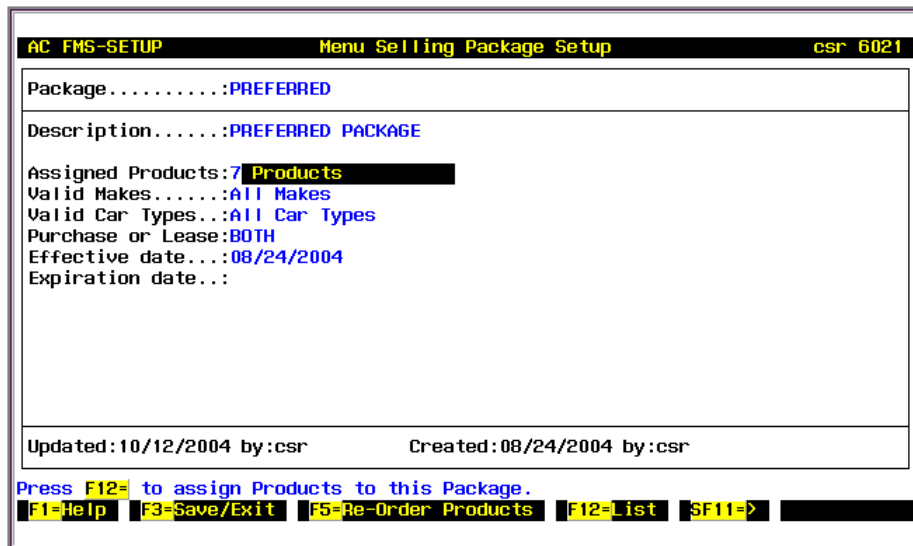


Figure 25. Package Setup Screen (example data)

At the Description field, enter a short description for the package as it should appear in the Menu Selling selection screen within the F&I application.

5. At the Assigned Products field, press **F12=List** to display a list of products.

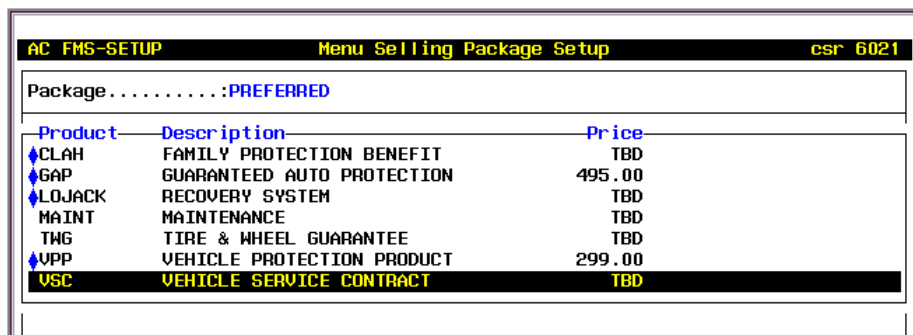


Figure 26. Product Selection List

6. Use the Up and Down arrow keys or the F9=Search command key to find the products you want to add to the package, and press **Enter** for each one. To select all the products in the list, press the asterisk key ( \* ).
7. Press **F3=Exit** to save your selections and return to the main setup screen.
8. At the Valid Makes field, use the F12=List command key to open a selection list and choose each make of vehicle to which the package applies. To choose all makes, enter **ALL**.

9. At the Valid Car Types field, use the F12=List command key to open a selection list (New, Used, Demo, etc.) of car types. Press **Enter** at each one to which the package applies. To choose all types of vehicle, enter **ALL**.
10. At the Purchase or Lease field, enter **P** if the package applies only to purchase deals, **L** for lease deals, or **B** for both purchase and lease deals.
11. Enter an effective date for the package setup.
12. Enter an expiration date, if any, for the package setup.
13. Press **F3=Save/Exit**, and then choose the **Save Changes** option.

## The ALACARTE Package

By default, the F&I Menu Selling application setups automatically include one package definition that is not treated as an all-or-nothing package choice during the F&I sales process. The 'ALACARTE' package provides a way to let the customer pick and choose from the set of all products that have been added to the ALACARTE setup in FMS-SETUP, rather than buying all products in the package.

Setting up the ALACARTE package does not require any special procedure, and the package can be given any description you want (the default description is CUSTOM PACKAGE).

For more information on how the ALACARTE package can be used within the FI function, see step 7 in *Using Menu Selling in the F&I Application* on page 25.

## Deleting a Package

Deleting a package does not remove the record, but marks the code as VOIDED in the list of packages. To redefine a voided code, open the record and enter the data again.

To void a package on the list of defined setups:

1. From the F&I Menu Selling main menu, select the **Package** option.
2. Press **F12=List** to open the list of packages, and then select the record you want to void.
3. Press **Shift-F8=Delete**.
4. At the confirmation prompt, enter **Y** to proceed with the delete command.
5. Press **F3** to return to the main menu.

## Changing the FMS-SETUP Password

To update the password for the F&I Menu Selling setups:

1. From the F&I Menu Selling main menu, select the **Change password** option.
2. Enter the current password.
3. Enter the new password you want to use.
4. Enter the new password a second time, exactly as previously typed, to confirm.

## Using Menu Selling in the F&I Application

Use the instructions and guidelines in this section when working with products defined in F&I Menu Selling along with deals in the F&I application.

To attach one or more F&I Menu Selling products to a vehicle deal:

1. On your F&I (*name*-FI) application account, enter **FI** at the Function Code prompt.
2. Recall or start a new Purchase or Lease deal.

Open the window at the More Screens field to find and choose from your menu packages

FI975B		Purchase Information Screen		DEMO-FI	
1) Fin Source:	GMAC	16) Service Contract:	\$	980.00	
2) APR:	7.29%	17) Window:Fees:	\$	199.99	
3) Term:	60	18) Taxes:			
4) Stock Number:		19) We Oues:			
5) Cash Price:		20) Contract Date:		07/01/04	
6) Less:Rebate:		21) Days To/1st Payment	30	07/31/04	
7) Cash Down:		22) Payment----->:			
8) Trade Allow:		23) More Screens:		N	
9) T1 Payoff:					
10) T2 Payoff:					
11) Insurance 1:	\$ 600.00	Sale Subtotal:			
12) CL/A&H Code:	S	Total Financed:			
13) CL Premium:		Finance Charge:			
14) AH Premium:		Total Other Charges:			
15) Slpr 1:		Total of Payments:			
Command: 23		Deferred Price:			
		Unpaid Balance:			

F1=Help   F2=Home   F3=Save   F4=Cancel   W=Window

Figure 27. Purchase Information Screen

3. Move to the More Screens field.

*Note.* The name of this field in the F&I window may vary (*Additional Screens, Menu Selling, More Options, etc.*).

4. Enter **W** to open the detail window.

DEMO-FI FI   Custom Program Access   csr 6017

Program Menu

- Multiple Payment Plans
- Additional Misc Prompts
- Menu Selling

Figure 28. Custom Programs Window

5. Select **Menu Selling** from the list of custom programs.

*Note.* Your list of custom programs may vary from those in the example in Figure 28.

- The Menu Selling selection screen opens. The top section of the screen shows a summary of the vehicle deal data, and the lower portion lists the packages that apply to the selected vehicle and store.

DEMO-FI FI		Menu Selling		csr 6024	
Deal . . . :	31677	Purchase		Name:	POTTER,JIM
VIN . . . . :	231VB325D23V5D322			Year, Make and Model:	2001 SEBR CHRY NEW
Fin Amt:	\$18,789.95	Pmt:	\$358.80	Term:	60 APR: 7.29%
Package	Description	Sale Price			
PREFERRED	PREFERRED PACKAGE	TBD			
VALUE	VALUE PACKAGE	TBD			
STANDARD	STANDARD PACKAGE	TBD			
ALACARTE	CUSTOM PACKAGE	TBD			
Choose a Package and press <ENTER>					
F1=Help		F3=Save		F4=Cancel	
F6=Print		F9=Search			

Figure 29. Package Selection List (example)

To add a package, use the Up and Down arrow keys and the F9=Search key to find the package you want to offer, and then press **Enter** to select it.

- The program displays the products within the selected package. For a typical package, each product in the contents listing is marked with YES in the Select column. The sale price, if set up in advance in *Defining F&I Menu Selling Products* on page 17, appears in the right-hand column.

RCE7-FI FI		Menu Selling		csr 6133	
Deal . . . :	53271	Purchase		Name:	POTTER,JIM
VIN . . . . :	JH4KA9656YC019999			Year, Make and Model:	2000 35RL ACUR NEW
Fin Amt:	\$45,447.45	Pmt:	\$1,010.95	Term:	60 APR:12.00%
VALUE PACKAGE		Fin Amt:	TBD	Pmt:	TBD
Product	Description	Select	Sale Price		
USC	VEHICLE SERVICE CONTRACT	YES	TBD		
GAP	GUARANTEED AUTO PROTECTION	YES	495.00		
CVPP	VEHICLE PROTECTION PRODUCT	YES	299.00		
LOJACK	RECOVERY SYSTEM	YES	TBD		
MAINT	MAINTENANCE	YES	TBD		
Press F2=Detail to edit Product information.					
F1=Help		F2=Detail		F3=Save	
F4=Cancel		F6=Print			
F9=Search					

Figure 30. Package Contents Listing (example)

In an 'a la carte' package, the products displayed all indicate NO in the Select column, by default.

**For each product in the 'a la carte' package that the customer chooses for the vehicle deal, move to the row for that product and then press **Enter**.** The program displays the defined sale price (or 'TBD') and changes the Select column setting to YES.

Each product in the system-defined ALACARTE package is marked as Rejected until selected here with the Enter key

Product	Description	Select	Sale Price
GAP	GUARANTEED AUTO PROTECTION	YES	495.00
LOJACK	RECOVERY SYSTEM	NO	REJECTED
MAINT	MAINTENANCE	YES	TBD
VPP	VEHICLE PROTECTION PRODUCT	YES	299.00
VSC	VEHICLE SERVICE CONTRACT	NO	REJECTED
CLAH	FAMILY PROTECTION BENEFIT	NO	REJECTED

Select/Reject Product by pressing <ENTER>, F2=Detail.  
 F1=Help F2=Detail F3=Save F4=Cancel F6=Print F9=Search

**Figure 31. ALACARTE Package Contents Listing (example)**

- For each (selected) product in the list for the package, use the arrow keys to move to that row, and then press **F2=Detail** to open the product window, where you can review the required information for that product.

*Note.* It is recommended that you review every product in the package, not just those with a Sale Price of TBD. Products with predefined sale prices may also need additional information filled in before they can be added to a customer deal.

- The product detail window lists all the fields required to produce and print a complete form for the selected product. (The detail window fields for a specific product are derived from its product type. For more information, see *Defining Product Types* on page 14.)

```

DEMO-FI FI                               Menu Selling                               csr 6024
Deal...:31677   Purchase                    Name:POTTER,JIM
VIN...:231VB325D23V5D322                  Year, Make and Model:2001 SEBR CHRY NEW
Fin Amt: $18,789.95  Pmt: $374.63  Term:60  APR: 7.29%

VALUE PACKAGE

Purchase Insurance

Insurance Name...:MAINTENANCE
Premium.....:
Term.....:
Deductible.....:
Policy Limit.....:
Policy Number.....:
Cost.....:

Enter the name of the Insurance.
F1=Help  F3=Save/Exit
    
```

Figure 32. F&I Menu Selling Product Screen (TBD example)

Complete each field in the screen to define the exact product the customer is purchasing along with the vehicle. (Depending on the product, you may also have to confirm the premium, price, or customer cost value, even if a Sale Price has already been defined.)

10. Press **F3=Save/Exit** to save the product detail data and return to the package contents listing.

*Note.* The program automatically prompts you whether you want the entered price data to apply to other packages as a default value. Enter **Y** if yes or **N** if the price for the selected product will vary from deal to deal.

The financed amount (Fin Amt) and payment (Pmt) field values for the selected package are calculated as you finish setting the customer price for each product

```

RCE7-FI FI                               Menu Selling                               csr 6133
Deal...:53271   Purchase                    Name:POTTER,JIM
VIN...:JH4KA9656YC019999                  Year, Make and Model:2000 35RL ACUR NEW
Fin Amt: $45,447.45  Pmt: $1,010.95  Term:60  APR:12.00%

VALUE PACKAGE                               Fin Amt: $49,690.35  Pmt: $1,105.33

Product  Description                          Select  Sale Price
VSC      VEHICLE SERVICE CONTRACT              YES     2400.00
GAP      GUARANTEED AUTO PROTECTION          YES     495.00
CVP      VEHICLE PROTECTION PRODUCT            YES     299.00
LOJACK   RECOVERY SYSTEM                       YES     600.00
MAINT    MAINTENANCE                          YES     155.00

Press F2=Detail to edit Product information.
F1=Help  F2=Detail  F3=Save  F4=Cancel  F6=Print  F9=Search
    
```

Figure 33. Package Contents Listing, with Prices

11. Repeat the previous three steps for the remaining products in the package, if any.

12. At the Package Contents Listing screen, press **F3=Save**.

Package	Description	Sale Price
PREFERRED	PREFERRED PACKAGE	TBD
VALUE	VALUE PACKAGE	\$3949.00
STANDARD	STANDARD PACKAGE	TBD
ALACARTE	CUSTOM PACKAGE	

Deal . . . :53271      Purchase      Name: POTTER,JIM  
VIN . . . :JH4KA9656YC01999      Year, Make and Model:2000 35RL ACUR NEW  
Fin Amt: \$45,447.45      Pmt: \$1,010.95      Term:60      APR:12.00%

Choose a Package and press <ENTER>  
F1=Help    F3=Interface    F4=Cancel    F6=Print    F9=Search

Figure 34. Package Selection Screen (example data)

13. To process the selected Menu Selling package as part of the vehicle deal, press **F3=Interface**.

*Note.* You must review and complete the product data screen for each TBD product selection before the program will allow you to run the Interface command.

14. After calculating a new deal price and payment, the program returns you to the Purchase (or Lease) Information Screen within the F&I application.

At this point, continue working with the deal as usual to complete your department's F&I procedures.

**Important!** By design, selections made in the Menu Selling screens are derived from the information about the selected vehicle and about the type of deal. **If you change the vehicle or the deal type** after choosing packages or products, be sure to return to the Menu Selling screens to confirm or revise your choices.

