Quantech Q-Lite

SOFTWARE MANUAL

V7.0.0

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1 Introduction

Quantech is one of the leading providers of Finance and Insurance software for Automotive, RV, Powers Sports, and Marine Dealers.

Quantech Q-Lite was developed out of a need for dealerships who wanted a simple to use, stand alone F&I program strictly for processing deals and printing forms. Q-Lite is a pared down version of our full featured Q-F&I software.

Included in our Forms and Software Support program is not only technical support but also the programming of any new dealer specific forms, bank, insurance, warranty and other industry forms.

1.1 Quantech Q-Lite Versions

Q-Lite is offered as a single-user stand-alone version. For broker use - supporting multiple business names, multi-user host/guest and client/server versions please enquire about our full featured software Q-F&I.

1.2 Contact Us

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2 Requirements & Set-Up

2.1 Minimum Hardware and System Software Requirements

2.1.1 Single-User Systems

- Processor: Pentium 2, 400MHz or equivalent
- RAM: 128Mb
- Colour: High Colour (16 bit)
- Operating Systems: Windows 95/98, NT, 2000, XP, 2000 Server, 2003 Server
- Printers: Impact printer is required for multiple page forms. See Section 11.2 for a list of compatible printers. Laser printer or high quality inkjet printer is recommended for printing of reports.

2.2 Installation

1. Quantech sends a link to the program installer. Click on the link and follow the instructions.
2. The installer will place a shortcut to the program startup on your desktop.

2.3 Startup

Double click on the Quantech Q-Lite icon on your desktop and the startup screen will appear. The HOME Page/Main Menu screen will then be displayed.

2.3.1 Activation Code

Quantech Q-Lite requires an activation code that expires quarterly. You will receive your new activation code by email and by fax approximately one week before the expiry date. On the first day of the new quarter (January 1st, April 1st, July 1st and October 1st) you will be prompted to enter the new Activation Code.

2.3.2 Screen Resolution

If you do not see the entire screen, as shown in our screenshots, your windows screen resolution may not be set to at least 800 X 600. Consult your Windows documentation for help in setting your screen size.

3 Using Quantech Q-Lite – The Basics

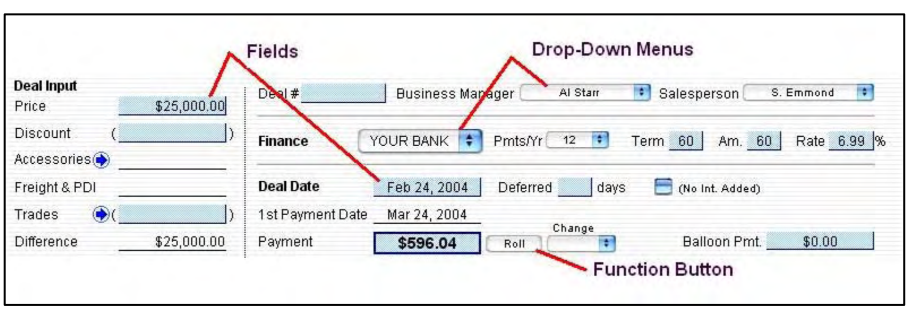
This section contains some important information on how to use and navigate around Quantech Q-Lite and describes conventions and standards within the software.

Throughout the manual, specific formatting denotes specific items:

☑	- Important Notes
Bold Italics	- Tabs or Buttons
CAPS	- Screens

3.1 Definitions

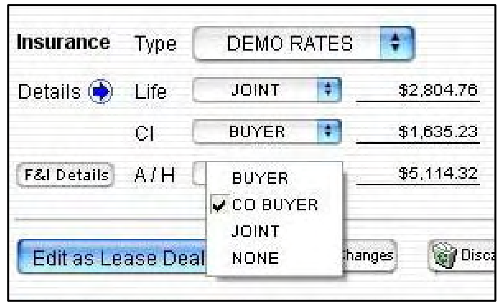
Fields are boxes or areas that contain data. Most fields are where information is entered, however some fields will display data that cannot be changed.



Function Buttons are buttons that perform specific tasks or functions pertaining to the data or location on the screen where they are found, when clicked on.

Blue Arrows  are go-to buttons. These open related screens with more detailed information.

Drop-Down Menus are not in the tab sequence and must be selected with your mouse. When the drop-down menu opens, select your choice with either your mouse **OR** use the up/down arrow keys and then hit the enter key.



Tabs are coloured tabs found at the top your screen. The ***Home*** tab will open the HOME Page where you set your Preferences and Defaults. The ***Deals*** tab will open the DEAL Database and the ***Calendar*** tab will open the Calendar/Daytimer. The ***Contacts*** and ***Inventory*** tabs are disabled in Q-Lite.

Buttons are located in the **Button Bar** just under the Tabs. These are for accessing related screens, depending on where you are in the software.

3.2 Keyboard Enter, Tab, & Arrow Keys

The **tab key** moves you from field to field. The up/down **arrow keys** move you up and down the list in a drop-down menu and the **enter key** will accept that selection.

You can move from field to field by either using the tab key **OR** by using your mouse.

You can select an item from a drop-down menu by either using your mouse **OR** by using your up/down arrow keys and then hitting the enter key.

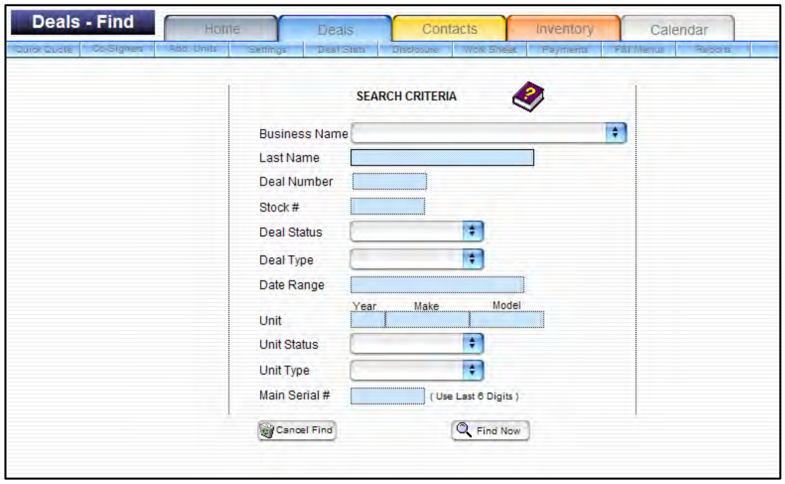
The enter key is used to select a selected item from a drop-down menu that you have used the arrow keys to navigate to.

3.3 Exiting Quantech Q-Lite

Return to the Home Page and exit by clicking on the Exit button before you shut down your computer.

3.4 Search/Find Screen

The **Find Deal** button opens the **Search Criteria** screen. Search for a specific record or group of records based on the information entered into any of these fields. Leave all fields empty to find all records.



4 Getting Started

4.1 Setting your Preferences and Defaults

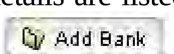
Important:

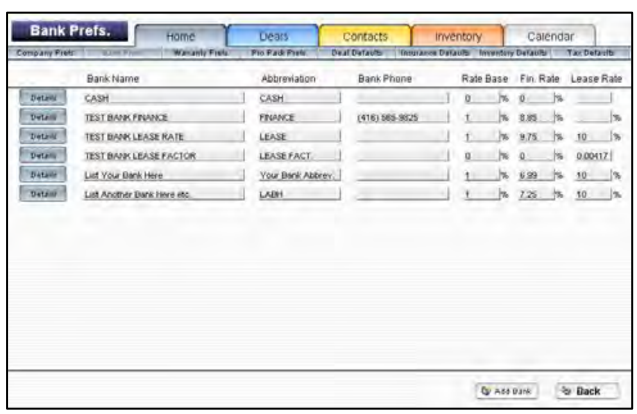
Before using the software or starting your first deal you will need to define your Company Settings and Preferences. You will also need to set your Deal Defaults, Insurance Defaults, Inventory Defaults and Tax Defaults. This only takes a few minutes and will provide the software with the basic information to get you started. Anything you enter in your default screens can be changed in the deal itself. These buttons are found in the Button Bar on your HOME screen.

4.1.1 Company Preferences

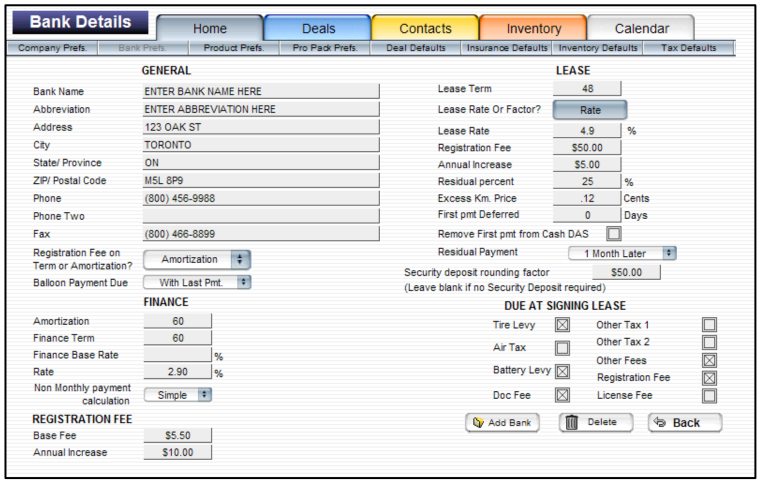
Enter your Company information on this screen. Verify and complete the information on this screen as it will be used in the printing of your contracts. If the information in these fields is incorrect please call our support staff.

4.1.2 Bank Preferences

All your lending institutions and their basic details are listed on this screen. Click  to add a bank. To view or edit the specifics of a bank, click  .



Once in the BANK DETAILS screen, enter all current information for your Lenders and Finance Companies. The information you enter on your BANK PREFERENCES screen will be used for calculations and printing your contracts. You can add, delete, and edit the details of your banks at any time. The term, amortization, registration fee, interest rate and lease settings set on this screen can be changed in any deal. The right hand side of the screen is for Leasing information.



4.1.2.1 Abbreviation

This is a **required field** as it is used when selecting or changing a bank in a deal. Use whatever abbreviation you will associate with this bank.

4.1.2.2 Registration Fee on Term or Amortization:

If set to 'Term', the Registration Fee (or PPSA) will be calculated on the Term of the Loan. If set to 'Amortization', the Registration Fee will be calculated on the Amortization. Contact your banks for their Registration Fee Schedules.

4.1.2.3 Amortization and Finance Term

The Amortization is usually set to the longest amortization available, however it can be set to whatever amortization you use the most.

The Term is usually set to the longest term available, however it can be set to whatever term you use the most. Contact your banks for their Term and Amortization Schedules.

These can be changed in a deal at any time.

4.1.2.4 Finance Base Rate

The lowest rate offered by this particular bank or it can be left blank. When rate information is updated on this screen, only new deals will be affected and will not change existing or delivered deals.

4.1.2.5 Rate

This field can be updated whenever you receive rate change notices from your Lenders. Enter the rate that you will use most often with this bank. Again, this rate can be changed in any deal at any time.

4.1.2.6 Non-Monthly Payment Calculation

Defaulted to ‘Simple’. There are two different methods used to calculate non monthly payment schedules. Most all banks are currently using the ‘Simple’ method.

4.1.2.7 Registration Fee (PPSA)

In the Base Fee field enter the Banks' base registration fee. In the Annual Increase field enter the Banks' annual increase. Contact your banks for their Registration Fee Schedules.

4.1.2.8 Lease Term

Enter the default lease term for this bank.

4.1.2.9 Lease Rate or Factor

This is a Toggle Button that selects whether this bank uses a Rate or Factor. Enter the Rate or the Factor in the box below the Toggle Button.

4.1.2.10 Lease Registration Fee & Annual Increase

Same as the Finance Registration Fee & Annual Increase described above.

4.1.2.11 Residual Percent

Enter the default Residual Percent of the buyout for this bank.

4.1.2.12 Excess Km/Miles Price

Enter the amount in Cents per Kilometer/Miles over the maximum allowable Kilometers/Miles.

4.1.2.13 First Payment Deferred

Set to when the first payment will be deferred to. Leave blank for a standard Lease Deal.

4.1.2.14 Remove First Payment…checkbox

‘Check’ this box if the first payment is **not** Due at Signing.

4.1.2.15 Residual Payment

You have the option of selecting 'With Last Payment' or 'One Month Later' from the drop-down list. Check with the leasing company for their requirements.

4.1.2.16 Security Deposit Rounding Factor

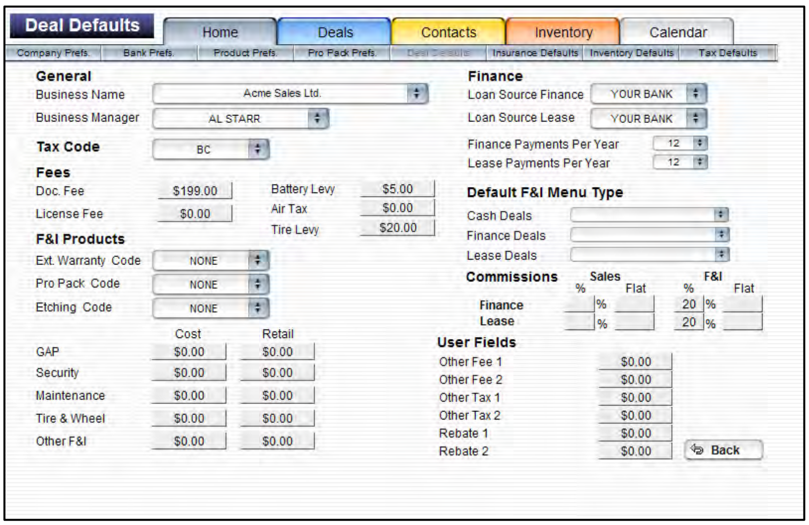
Security Deposit will be calculated using a monthly payment rounded up to this amount.

4.1.2.17 Due at Signing

'Check' the appropriate boxes for amounts to be collected at signing.

4.1.3 Deal Defaults

Enter your preferred settings for a standard deal. Any values entered on this screen will be included in each new deal. All settings on this screen can be changed in any deal at any time.



4.1.3.1 Business Name and Business Manager

The selected Business Name will print on forms. Edit and select the default Business Manager.

4.1.3.2 Tax Code

Select the Tax Code for your territory from the drop down box. **Refer to section 4.1.6.**

4.1.3.3 Fees

If applicable, enter your usual Doc Fee, License Fee, Tire Levy, Battery Levy and Air Tax.

4.1.3.4 F&I Products

Extended Warranty, Pro Pack and Etching Codes are available to you if you choose to pre-enter them, **see Sections 4.1.7 and 4.1.8**. Select the Codes of your choice from the drop-down menus, or select 'None'. If these fields are set to 'None', Warranties, Pro Packs and Etching amounts can be entered in each deal as needed either by code or by price.

Enter Cost and Retail for all other F&I products that you want included in your deal. If left blank, these can also be added in each deal.

☑ Any F&I product added to a deal that has not been selected from your defaults will need to have the **Cost** of the product entered on the SETTINGS screen. This enables the software to accurately calculate your profit on the deal once it is complete.

4.1.3.5 Finance

From the drop-down boxes select the Bank you will use the most often for Finance and Lease deals. The lenders on these lists are entered in your Bank Preferences.

Select the 'Payments Per Year' option from the drop down boxes.

4.1.3.6 Default F&I Menu Type

This feature is not enabled in Q-Lite.

4.1.3.7 Commissions

Enter the commission percentage for finance and lease under F&I. The Sales section is not enabled in Q-Lite.

4.1.3.8 User Fields

Optional fields for other non-standard Fees, Taxes and Rebates. These fields need to be labeled and set by Quantech. Should you require these extra fields, please contact our office.

4.1.4 Insurance Defaults

Select your preferred settings from the drop-down menus. Any settings entered on this screen will be the Default insurance settings for each deal. These settings can be changed in any deal. Select your **Insurance** Company and the **Type** of Insurance you sell the most. Select the rest of your preferred settings. The **Display Insurance Premium** setting will display the corresponding premium on the deal workscreen. The **Insurance Allowance** field is your commission percentage paid by the Insurance Company and is used in calculating your profit on a deal.

4.1.5 Inventory Defaults

From the drop-down menu select the most used **Unit Category** for your dealership. Each category, **Car or Truck**, **Marine**, **Powersports** or **R.V.** has its own category specific details screen. This category can be changed in your Inventory File when adding a unit or a trade to your deal.

4.1.6 Tax Defaults

Q-Lite has the capability of tracking different tax settings and percentages for different provinces, states or territories.

To set up your Tax Defaults, click on 'Add Default'. Enter the tax code (typically the province or state), enter the tax percentages and 'check' off the appropriate boxes. These tax settings can be edited in any deal.

Set up as many Tax Codes as you require.

LEASING - GST and PST on a Lease payment is calculated on the payment amount unless there is a Lien Payout on a Trade-In. 'Check' the appropriate GST/PST Lien Credit boxes in your Tax Defaults. If there is a Lien Payout, the tax amount will be reduced to reflect the GST and PST Tax Credits on the lien.

4.1.7 Product Preferences

This is an optional screen for those who wish to pre-code and enter all of your (or most commonly used) Extended Warranty options and Etching options. By pre-coding your warranties it eliminates the need to enter the retail price and the cost in your deal. If a Warranty and/or Etching is selected by code the retail price can still be edited in the deal. Due to the large numbers of warranties and variations offered some might find it easier to enter the warranty information manually into each deal.

4.1.7.1 Warranty Code/Etching Code Setup

Click on 'Add Product', enter a unique code for each product, its actual name, its selling price and your cost. The reserve (commission) calculates automatically.

To delete a product from this screen, click on 

, then click on 

.

4.1.8 Pro Pack Preferences

This is an optional screen for those who wish to pre-code and enter all of your (or most commonly used) Pro Pack (Paint and Fabric Protection) options. Pre-coding your Pro Packs eliminates the need to enter the retail price and the cost in your deal. If a Pro Pack is selected by code, the retail price can still be edited in the deal.

4.1.8.1 Pro Pack Code Setup

Build your own pro pack packages by adding up to ten different items. These items are totaled in the PRO PACK DETAILS screen as a package.

Click on 

, enter the Pro Pack Code, Name, Description, Cost and Selling Price of each item in your package. The reserve (commission) calculates automatically.

There is a ***Duplicate*** button for easy package building. Click on 

, change the Pro Pack Code and Name, add or delete any items.

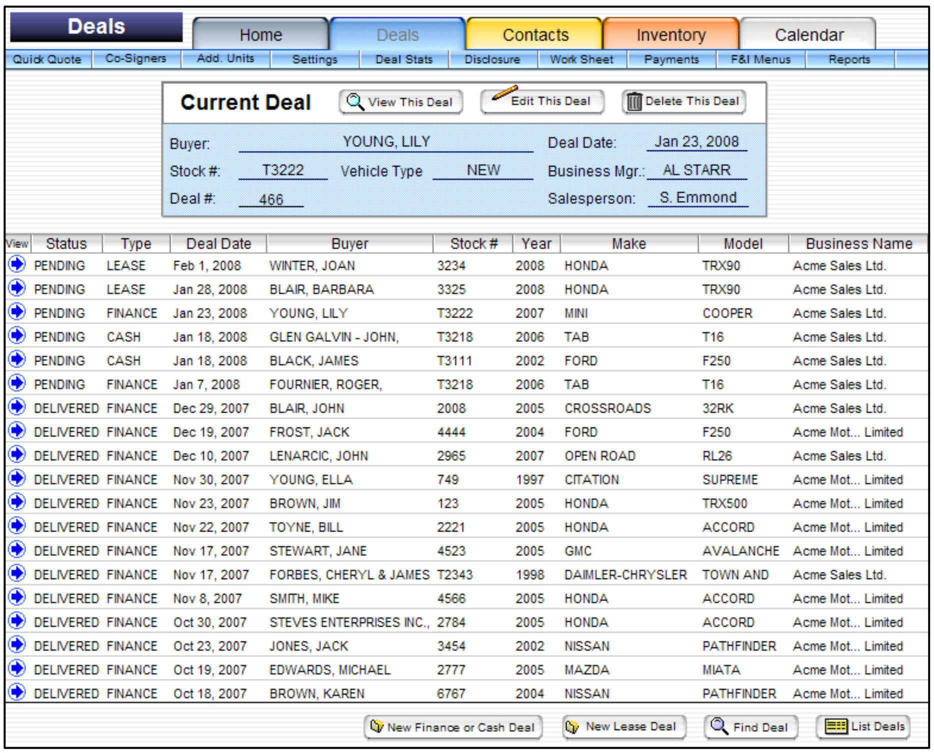
To delete a Pro Pack follow the same procedure for deleting a Warranty.

5 Deals

From the HOME page, click on the Deals Tab. This opens your DEALS Database where all of your Deals are listed and stored. The Deal Database can be accessed from most any screen in the software by clicking on the blue ***Deals*** Tab.

Here, deals are entered, edited or deleted. Deals are listed in order by Deal Date.

Columns can be re-sorted by clicking on the heading.



View	Status	Type	Deal Date	Buyer	Stock #	Year	Make	Model	Business Name
	PENDING	LEASE	Feb 1, 2008	WINTER, JOAN	3234	2008	HONDA	TRX90	Acme Sales Ltd.
	PENDING	LEASE	Jan 28, 2008	BLAIR, BARBARA	3325	2008	HONDA	TRX90	Acme Sales Ltd.
	PENDING	FINANCE	Jan 23, 2008	YOUNG, LILY	T3222	2007	MINI	COOPER	Acme Sales Ltd.
	PENDING	CASH	Jan 18, 2008	GLEN GALVIN - JOHN,	T3218	2006	TAB	T16	Acme Sales Ltd.
	PENDING	CASH	Jan 18, 2008	BLACK, JAMES	T3111	2002	FORD	F250	Acme Sales Ltd.
	PENDING	FINANCE	Jan 7, 2008	FOURNIER, ROGER,	T3218	2006	TAB	T16	Acme Sales Ltd.
	DELIVERED	FINANCE	Dec 29, 2007	BLAIR, JOHN	2008	2005	CROSSROADS	32RK	Acme Sales Ltd.
	DELIVERED	FINANCE	Dec 19, 2007	FROST, JACK	4444	2004	FORD	F250	Acme Mot... Limited
	DELIVERED	FINANCE	Dec 10, 2007	LENARCIC, JOHN	2965	2007	OPEN ROAD	RL26	Acme Sales Ltd.
	DELIVERED	FINANCE	Nov 30, 2007	YOUNG, ELLA	749	1997	CITATION	SUPREME	Acme Mot... Limited
	DELIVERED	FINANCE	Nov 23, 2007	BROWN, JIM	123	2005	HONDA	TRX500	Acme Mot... Limited
	DELIVERED	FINANCE	Nov 22, 2007	TOYNE, BILL	2221	2005	HONDA	ACCORD	Acme Mot... Limited
	DELIVERED	FINANCE	Nov 17, 2007	STEWART, JANE	4523	2005	GMC	AVALANCHE	Acme Mot... Limited
	DELIVERED	FINANCE	Nov 17, 2007	FORBES, CHERYL & JAMES	T2343	1998	DAIMLER-CHRYSLER	TOWN AND	Acme Sales Ltd.
	DELIVERED	FINANCE	Nov 8, 2007	SMITH, MIKE	4566	2005	HONDA	ACCORD	Acme Mot... Limited
	DELIVERED	FINANCE	Oct 30, 2007	STEVES ENTERPRISES INC.,	2784	2005	HONDA	ACCORD	Acme Mot... Limited
	DELIVERED	FINANCE	Oct 23, 2007	JONES, JACK	3454	2002	NISSAN	PATHFINDER	Acme Mot... Limited
	DELIVERED	FINANCE	Oct 19, 2007	EDWARDS, MICHAEL	2777	2005	MAZDA	MIATA	Acme Mot... Limited
	DELIVERED	FINANCE	Oct 18, 2007	BROWN, KAREN	6767	2004	NISSAN	PATHFINDER	Acme Mot... Limited

Clicking on New Finance or Cash Deal will open a new EDIT FINANCE DEAL screen.

Clicking on New Lease Deal will open a new EDIT LEASE DEAL screen.

Clicking on Find Deal will open the DEALS – FIND screen. This screen allows you to search for a deal by any of the criteria fields available.

Clicking on List Deals will open the DEAL LIST screen that produces a printable list of all deals. The columns in this list can be sorted by clicking on the heading. A Deal list can also be exported for external use. See Section 10 for information on exporting data.

5.1 Current Deal

This area DEALS SCREEN contains the basic information relating to a specific deal. To show a deal in the Current Deal area, locate it in the list at the bottom of the screen and 'click' on it. Once a deal is in the 'Current Deal' area you have several options.

From the Button Bar you have access to most screens for this specific deal.

View This Deal button will open the FINANCE DEAL screen if this deal is a Cash or Finance deal. It will open the LEASE DEAL screen if this is a Lease deal. On the FINANCE DEAL or LEASE DEAL screens, these deals are in View Mode only. Once on these screens, click on Edit Deal if you want to switch from view mode to edit mode.

Edit This Deal button will open the EDIT FINANCE DEAL screen if this deal is a Cash or Finance deal. It will open the EDIT LEASE DEAL screen if this is a Lease deal.

Delete This Deal button will remove this deal from your Deal Database.

☑ Once a deal has been deleted – it cannot be retreived. Delivered deals and deals that are currenty being edited by another user (Multi-User Systems) cannot be deleted.

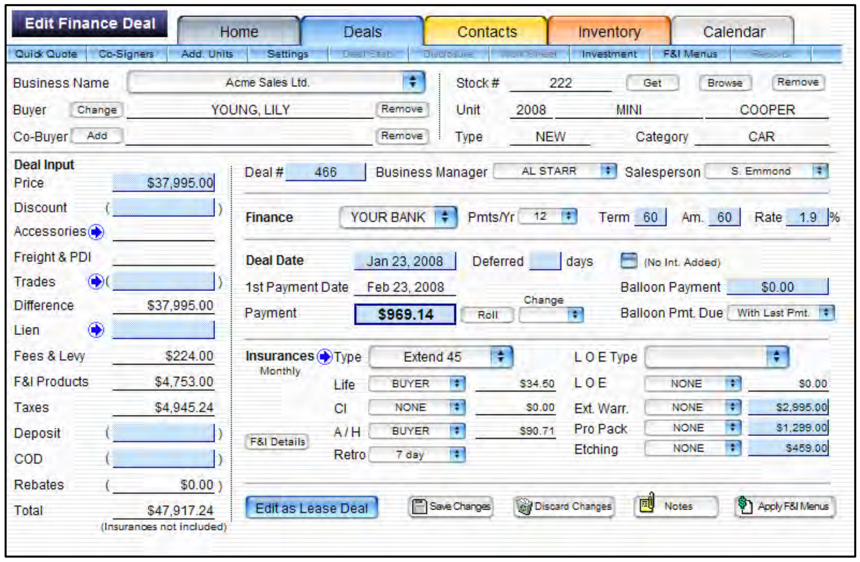
5.2 How to Enter a Deal

5.2.1 New Finance, Lease or Cash Deal

From the HOME page, click on Deals . This opens the DEALS screen.

Click on the function button New Finance or Cash Deal . This opens a new EDIT FINANCE DEAL screen. If this is a lease deal, click on New Lease Deal . This opens a new EDIT LEASE DEAL screen.

For instructions on completing a Lease Deal **see Section 5.2.9**.



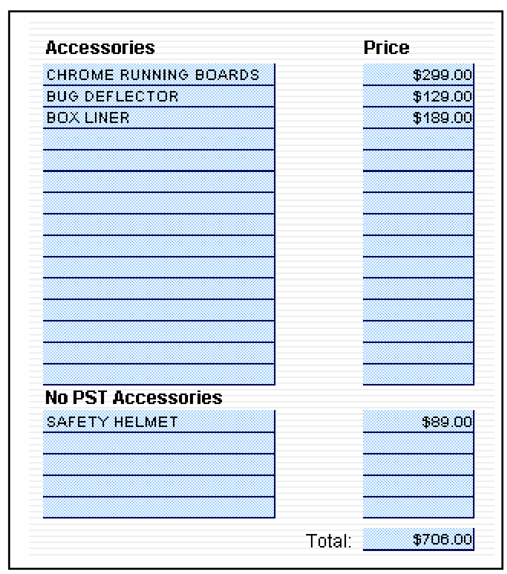
Click Add Buyer. This opens the CONTACT INFO screen. Complete your Buyer information and then click Back. From the EDIT FINANCE DEAL screen, click Add Co-Buyer if applicable.

Enter dollar values, (Price, discount, trades (if applicable), lien, deposit and COD) in the corresponding fields. Any adjustments or Default settings that cannot be changed on this screen can be edited on the SETTINGS screen, selected from the Button Bar at the top of your screen.

5.2.1.1 Accessories

Accessories is a field that contains the total retail selling price of all accessories sold with the vehicle. Accessory info, if any, is entered by clicking on the corresponding **Blue Arrow** .

There are two sections in ACCESSORIES. The top section contains standard accessories and the lower section contains safety equipment that is PST exempt, if applicable. PST will not be applied to the items in the 'No PST Accessories' section.

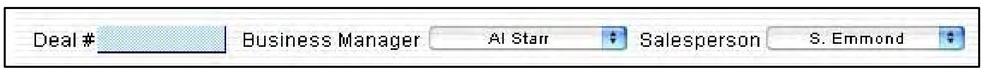


5.2.1.2 Trade(s)

The **Trades** field is for entering the price that you will be giving the customer for their trade vehicle(s), if any. Trade**(s)** details are entered by clicking on the corresponding **Blue Arrow.** The TRADE UNITS screen displays the trades attached to the deal. To add a trade, click , enter your trade information, click . This brings you back to the TRADE UNITS screen, click again, this brings you back to your deal. If there is more than one trade, repeat this process.

5.2.1.3 Other Fields and Drop-Down Menus

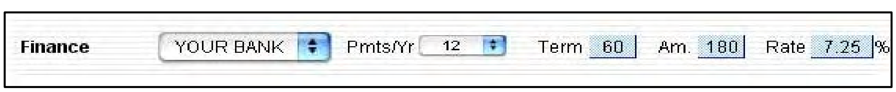
The **Deal #** field is set to Auto-increment. This field is editable. Select **Business Manager & Salesperson** from the drop-down menus. These drop-down menus can be edited by selecting edit from the bottom of the list.



Finance, insurance, warranty and other settings can be edited by entering values in the fields or by selecting from the drop-down menus. Insurance options can be further edited by clicking on the **Blue Arrow** in the insurance section of this screen. This opens the INSURANCE SETTINGS screen. If you have not set your Insurance Defaults you must go the INSURANCE SETTINGS screen to select an insurance company, otherwise the insurances will not calculate.

5.2.1.4 Finance

Click on this drop-down menu to change the defaulted lending institution or to change this deal to a Cash Deal. The items in this list are your abbreviations that you previously set up in your Bank Preferences from the HOME page.



5.2.1.5 Cash Deal

Selecting **'Cash'** in the Finance area removes all pre-set finance related settings such as insurances and registration (PPSA) fees.

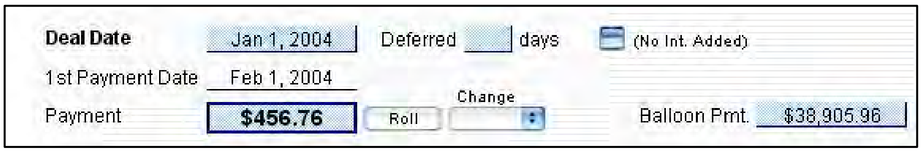
5.2.1.6 Pmts/Yr

Usually set to 12 payments per year (monthly payments). Other options are available including bi-weekly, bi-monthly, quarterly etc. Select one of the repayment options. Contact your lending institutions to verify their policies, as not all lending institutions offer every repayment option.

5.2.1.7 Deferred Finance Deals

If this is a Deferred Payment Deal, in the Deal Date section enter the number of days the first payment is to be deferred for. '**Check**' the '**No Interest Added**' check box if the deferred interest is to be paid up front. Leave the box '**unchecked**' if the interest is rolled into the deal. Contact your lending institutions to verify their policies.

If the Deferred field is left empty, or less than 30 days is entered, 30 days interest will automatically be calculated.



5.2.1.8 Roll Payment

The Roll Payment function will calculate a specific payment. In a **Finance Deal**, to adjust certain values (Price, Trade or COD) in your deal to achieve a specific payment do as follows: From the '**Change**' drop-down menu select Price, Trade or COD. Click Roll. Enter your target payment in the **Roll Payment Finance** message window and click ***OK***.

5.2.1.9 Roll Cash Deal

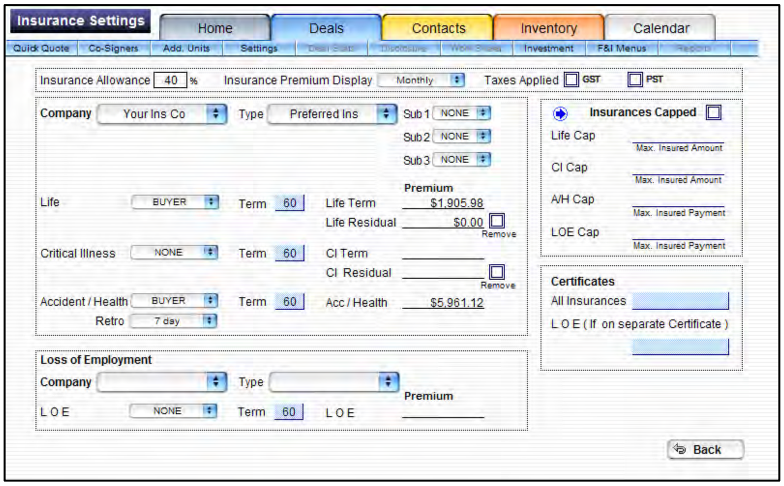
This feature is used to calculate a **Cash Deal** backwards. To adjust certain values (Price or Trade) in your deal to achieve a bottom line value, do as follows: From the '**Change**' drop-down menu select either Price, Trade. Click Roll. Enter your bottom line including all taxes, fees and levies in the **Roll Back for Cash Deal** message window and click ***OK***.

5.2.1.10 Balloon Payment

This field shows the residual amount owing at the end of the term if the amortization is greater than the term. Values can be manually entered into this field if the term and amortization are equal.

5.2.1.11 Insurance Settings

To further edit the Insurance settings, click on the **Blue Arrow**. The INSURANCE SETTINGS screen is where you edit insurance settings such as: Insurance Company, Type of Policy, Sub Types (if applicable), as well as other insurance specific settings. Check with your Insurance provider for specifics.



Some insurance providers cap insured amounts on larger purchases. To **cap insurances** on a specific deal, click on the **Blue Arrow** . Then 'check' the Capped Insurances box and enter capped amounts and capped payments in their respective fields.

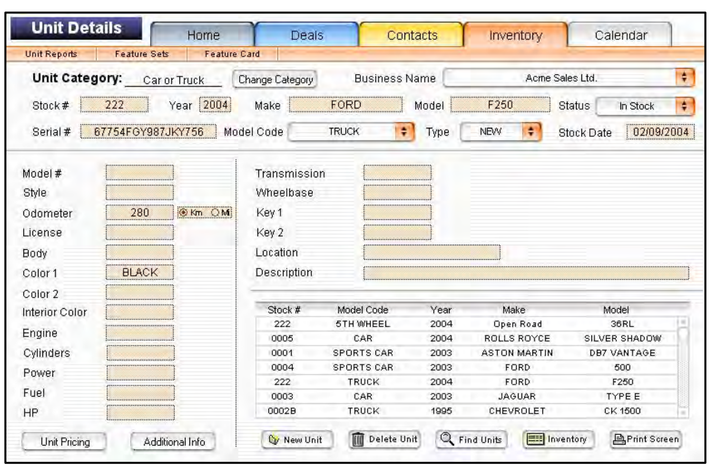
The **Certificates** field is an optional field for the Certificate number if insurance remittances are to be prepared by the software. The Certificate number can either be entered here, or you will be prompted to enter the Certificate Number when delivering your deal.

5.2.1.12 F&I Details

This sales tool breaks down the cost of all F&I products by the day, week, month, and year.

5.2.1.13 Vehicle Info

To add a vehicle to the deal, click on Browse . This will open a blank UNIT DETAILS screen. Complete all fields in the upper section of this screen by entering data and selecting from the drop-down menus. Complete any optional or other fields in the lower section of the screen and then click Back . To change the category of this unit click Change Category .



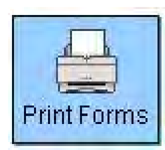
5.2.2 Saving Your Deal

Before you can exit a deal or have access to certain screens within the deal you will need to save or discard any changes. A deal must be saved before you will be allowed access to the **Print Forms** menu or before you will be allowed to **Deliver** a deal. Once saved, the deal will then be viewed on the FINANCE DEAL screen (or LEASE DEAL screen), which is a view only screen.

5.2.3 Saving or Discarding Changes

In the EDIT FINANCE DEAL or EDIT LEASE DEAL screen, you have the choice to save or discard any changes by clicking on the respective function buttons at the bottom of the screen. When you leave the deal, if changes have not been saved or discarded you will be prompted by a message to make your choice.

5.2.4 Print Forms



Once a deal has been saved you will be able to print your deal forms. Clicking on this button will open the Forms Menu. All forms that you have requested to be programmed will be listed here. If any form is missing, please contact our support desk. All forms are categorized and listed by Finance, Manufacturer, Insurance, Warranty, Pro Pack, Government, Dealership and Credit Apps. Make your selection from the drop down box and click on 'Open'. Select your form and follow the prompts.

5.2.5 Delivering a Deal

Once a deal has been fully completed you will need to **Deliver** it. In a Saved deal click on 

. This will move your deal out of pending status on your DEALS screen. Sold unit(s) will be removed from your inventory and any trade(s) will be added to the inventory file. Once a deal has been delivered it can no longer be edited. To edit a delivered deal it must be un-delivered. If a delivered deal has any trades, and those trades are in any another deal, it will not be possible to un-deliver the original deal.

5.2.6 How to Edit or View an Existing Deal

From the main DEALS screen, a deal can be selected for **Viewing** or **Editing**.

5.2.6.1 To View a Deal

To **View** a deal click on the **Blue Arrow** to the left of the deal in the deal list. This will open the FINANCE DEAL screen or LEASE DEAL screen (depending on the deal type).

OR

Find the deal you would like to view in the deal list and click on it. This moves the deal into the **Current Deal** section at the top of the screen. Here you have the option to either, edit, view or delete this deal. If you select ***View This Deal***, the deal will open to the FINANCE DEAL (or LEASE DEAL) screen. The FINANCE DEAL (or LEASE DEAL) screen is a View screen only. If you wish to edit the deal from this point, click on Edit Deal at the bottom of the screen.

5.2.6.2 To Edit a Deal

To **Edit** a deal click on the **Blue Arrow** to the left of the deal in the deal list. This will open the FINANCE DEAL screen or LEASE DEAL screen (depending on the deal type). To **Edit** the deal from this screen, click Edit Deal at the bottom of the screen. This puts this deal into Edit Mode. Note the screen changes to EDIT FINANCE DEAL (or EDIT LEASE DEAL).

OR

Find the deal you would like to edit in the deal list and click on it. This moves the deal into the **Current Deal** section at the top of the screen. Here you have the option the either edit, view or delete this deal. If you select ***Edit This Deal***, the deal will open to the EDIT FINANCE DEAL (or EDIT LEASE DEAL) screen.

5.2.7 Function Bar (In Edit Mode)

Depending on whether your deal is in Edit Mode (EDIT FINANCE DEAL or EDIT LEASE DEAL) or Saved Mode (FINANCE DEAL or LEASE DEAL) the Function Bar will allow you access to different screens.

5.2.7.1 Quick Quote

This screen has the basic fields for calculating a Finance or Lease 'Quick Quote'. The settings in your QUICK QUOTE screen are from your Default settings. These settings can be changed on your QUICK QUOTE screen, and the quote can either be saved or canceled. If saved, the quote will then be converted to an active, editable deal. If canceled, the information will be discarded.

The Payout Calculator on this screen can help estimate the lien payout of a customers' Trade Vehicle. This estimated lien amount can then be applied to the deal.

5.2.7.2 Co-Signers

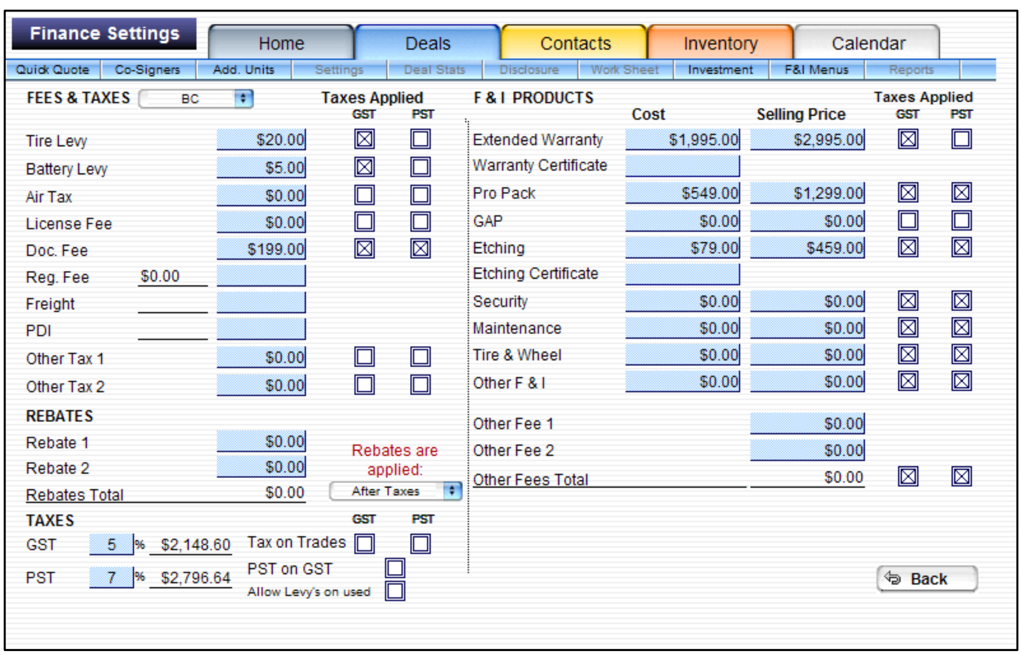
This screen is where co-signers and guarantors for the loan are entered. (usually the 3rd and 4th signers.) The buyer and co-buyer can also be edited on this screen.

5.2.7.3 Additional Units

Not enabled in Q-Lite.

5.2.7.4 Settings

This screen is where values and taxes are edited that cannot be adjusted on the EDIT FINANCE DEAL screen. Any F&I products sold in this deal that were not pre-entered or coded in your deal defaults will need to be broken down here. Entering the retail and cost on this screen allows the software to correctly calculate your profit in the **Deal Stats**.



5.2.7.5 Worksheet

Worksheet is accessible only from a Lease deal.

See Lease Deal in Section 5.2.9

5.2.7.6 Investment

This sales tool is designed to assist you in showing your client the monetary advantages of financing their deal rather than paying cash. The INVESTMENT CALCULATOR screen will show the gain that can be achieved if the client was to invest their cash and borrow the money to finance their purchase.

5.2.7.7 F&I Menus

Not enabled in Q-Lite.

5.2.8 Function Bar (In Saved Mode)

Depending on whether your deal is in Edit Mode (EDIT FINANCE DEAL or EDIT LEASE DEAL) or Saved Mode (FINANCE DEAL or LEASE DEAL) the Function Bar will allow you access to different screens.

5.2.8.1 Deal Stats

This screen displays the breakdown and profits on the completed transaction for the F & I office.

The F&I statistics are displayed in the middle column of this screen. There are fields available to enter the Dealer Finance Reserve, Adjustments and Commission Percentages.

5.2.8.2 Disclosure

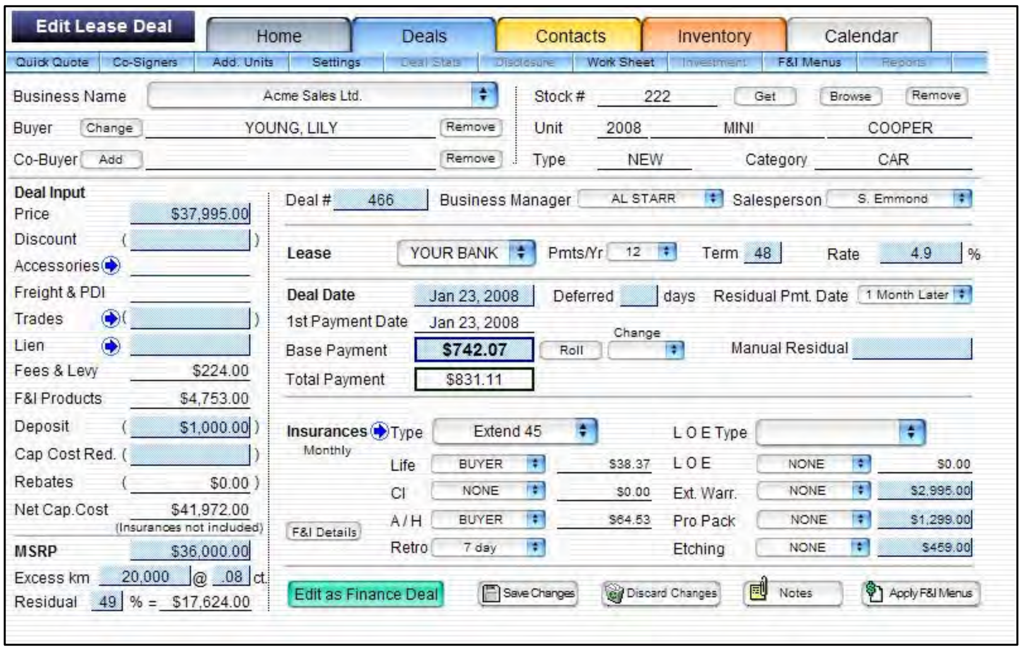
Displays a complete breakdown of the deal and the total costs of all items in the deal. It is recommended to visit this screen to verify all amounts before printing the paperwork.

5.2.8.3 Payments & Reports

Not enabled in Q-Lite.

5.2.9 Lease Deal

From the DEALS screen click on New Lease Deal . This opens an EDIT LEASE DEAL screen. Follow the same procedure for completing a Finance deal. You can switch from a Finance Deal to a Lease Deal by clicking on Edit as Lease Deal , or from a Lease Deal to a Finance Deal by clicking on Edit as Finance Deal . The EDIT LEASE DEAL screen is basically the same as the EDIT FINANCE DEAL screen with modifications for leasing such as:



MSRP – Manufacturers Suggested Retail Price – used to calculate the residual.

Excess km is the field for pre-purchased excess kilometers.

Residual % is the percentage of the MSRP that will be due at the end of the Lease.

In the **Deal Date section** of the screen there are also fields for:

Residual Payment Date – select choice from the drop-down menu

Manual Residual - is where the Residual amount is manually entered.

Payment is the payment **not including** taxes.

5.2.9.1 Worksheet

This is accessed by clicking on the ***Worksheet*** button in the Button Bar at the top of the screen.

The Worksheet displays a complete breakdown of the lease deal and the customer's total costs of all the items within the deal. It is recommended to visit this screen to verify all amounts before printing the paperwork.

There are fields available for:

Removing the First Payment 'Checking' this box will remove the first payment from the Total Cash Due.

Security Deposit is the first payment rounded to the nearest dollar amount. This would have been set in your defaults.

Vehicle Registration is a lease registration fee usually charged by the Lessor.

Other is for any other amount due at signing.

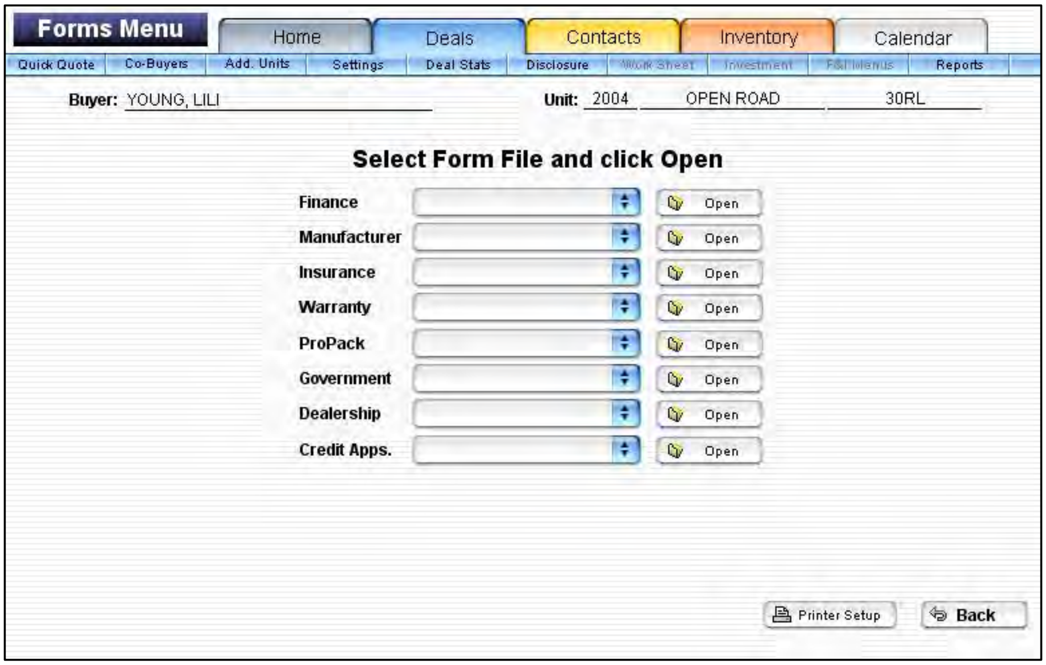
☑ Important Note regarding GST & PST On Lease Payment

The GST and PST on a Lease Payment is calculated on the payment amount unless there is a Lien Payout on the Trade-In AND you have 'Checked' the GST/PST Lien Credit boxes in your Tax Defaults or on the SETTINGS screen. If the GST/PST Lien Credit boxes have been 'Checked' AND if there is a Lien Payout the tax amount will be reduced to reflect the GST and PST Tax Credits on the lien.

6 Printing Forms

6.1 Forms Menu

All forms that you requested to be programmed will be listed on this screen. Forms are listed by category in separate drop-down menus. Select the form you wish to print from the drop-down menu and then click 'Open'. Select the form you wish to print and follow the prompt screens, if any.



6.1.1 Curomax/Dealer Track

These finance portal links are located in the Credit Apps dropdown box. Please call Quantech for instructions.

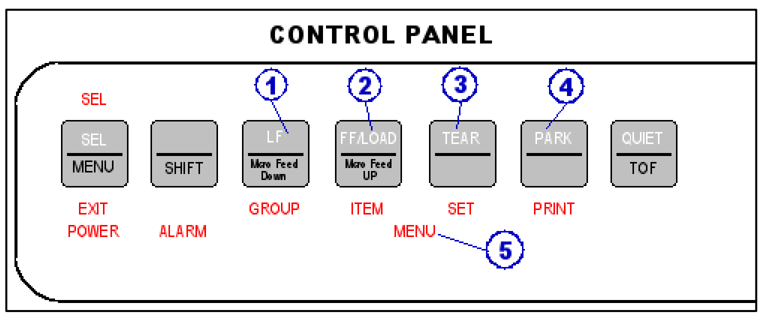
7 Printer Setup

Click this button before you print any forms for the first time. Set up the default printer and options that Quantech Q-Lite will use for printing forms. This will only need to be reset if you change printers.

7.1 Okidata ML320T / ML321T

7.1.1 ML320T Control Panel

In Menu mode, use the front panel buttons to change the defaults for the printer parameters. The changes made in Menu mode are automatically saved when you exit Menu mode and are retained even if the printer is turned off.



1. **GROUP:** Prints the next Group in the Menu. With the **SHIFT** key, prints the previous Group.
2. **ITEM:** Prints the next Item in the Group. With the **SHIFT** key, prints the previous Item in the Group.
3. **SET:** Prints the next Setting for an Item, With the **SHIFT** key, prints the previous Setting for an Item.
4. **PRINT:** Prints a copy of all the Menu settings. With the **SHIFT** key, prints the current settings for the Group selected.
5. **MENU:** Lights when the printer is in the Menu mode.

7.1.2 Entering and Exiting the Menu Mode: (ML320T)

To enter or exit the Menu Mode, hold **SHIFT** while pressing **SEL**.

7.1.3 Printing the Menu Settings: (ML320T)

- Make sure the paper is loaded in the printer.
- Enter the Menu Mode (**SHIFT** + **SEL**).
- Press the **PRINT** (PARK key).

7.1.4 Changing the Menu Settings: (ML320T)

- Press **SHIFT** + **SEL** to enter Menu Mode.
- Use the **GROUP**, **ITEM** and **SET** keys to make your changes.
- Press **GROUP** until the Group you wish to change appears in the first column.
- Press **ITEM** until the Item you wish to change appears in the second column.
- Press **SET** until the Setting you want appears in the third column.
- Press **SHIFT** + **SEL** to exit the Menu Mode.

Important: If you turn the printer off without first exiting the Menu Mode, the changes you have made will be lost.

7.1.5 Resetting the Menu: (ML320T)

To reset the Menu to the standard settings turn the printer off then Press **SEL** + **LF** while turning the printer on.

7.1.6 Setting the Top of Form (TOF): (ML320T)

Q-Lite is formatted for the printer's default 1" TOF. However some printers may need to have this adjusted slightly up or down. When setting the TOF, load the printer with paper and use the red line on the paper shield as a reference guide.

- Make sure the printer is deselected (**SEL** light is off).
- Press and hold **SHIFT**, then
- Press **LF** to move TOF higher (paper moves down).
- Press **FF/LOAD** to move TOF lower (paper moves up).

- Press **SEL** to re-select the printer.

7.1.7 Resetting TOF the Default Setting: (ML320T)

- Turn off the printer.
- Hold **PARK** + **QUIET/TOF** while turning the printer back on.

7.2 Printer Drivers

You must have the proper Printer Driver for your Printer installed in Windows in order to print forms from Q-Lite.

You must be able to print a proper test page with the correctly installed Printer Driver from Windows. To print a test page from Windows click on the ***Start*** button, then ***Settings***, then ***Printers***, then Right Click on the correct Printer Driver. Click on ***Properties***, then ***Print Test Page*** in the **General** tab.

You must select **Legal** as the Paper Size and **Tractor** as the Paper Source in the **Paper** tab of the Printer Driver **Properties**.

For help installing or configuring Printer Drivers, call your Computer supplier or manufacturer.

7.3 Printer Ports

Some computers have their Printer (Parallel) port set to **ECP**. This may cause problems when printing to Okidata printers.

If you experience trouble when printing to your Okidata printer and your Printer Port is set to **ECP** you will need to set it to **SPP** (Standard Parallel Port) in the computer's **CMOS SETUP**. Consult your Computer supplier or manufacturer for assistance.

7.4 Q-Lite Printer Setup

After setting up the printer in Windows you will need to select the correct printer from within Q-Lite. This is done by clicking on the '**Printer Setup'** button in the FORMS MENU. You will only need to do this once unless you change your default printer.

7.4.1 Q-Lite Printer Settings: (ML320T)

Enter Menu Mode to verify or change your printer's settings with the settings listed below.

Highlighted Red and Underlined settings are required for proper printing.

Emulation Mode should be **Epson Fx** and your Windows printer driver should be **Epson FX-286e** (see your windows manual for instructions on adding printers). Some printers may only give you ML, or IBM PPR, as your choices. If you use one of these, **your printing may not line up or might have some parts missing**.

Q-Lite doesn't use any settings for Rear Feed or Bottom Feed.

Some Printer Models may look different.

Printer Control	Emulation	Mode	Epson FX
Font	Print	Mode	Utility
Font	DRAFT	Mode	HSD
Font	Pitch		10 CPI
Font	Style		Normal
Font	Size		Single
Symbol Sets	Character Set		Standard
Symbol Sets	Language Set		American
Symbol Sets	Zero Character		Slashed
Symbol Sets	Code Page		USA
Top Feed	Line Spacing		6 LPI
Top Feed	Bottom Margin		Invalid
Top Feed	Page Length		17"
Top Feed	Wait Time		1 sec
Top Feed	Page Length Control		by Actual Page Length
Set-Up	Graphics		Bi-directional

Set-Up	7 or 8 Bits Graphics	7
Set-Up	Receive Buffer Size	16K
Set-Up	Paper Out Override	Yes
Set-Up	Print Registration	0

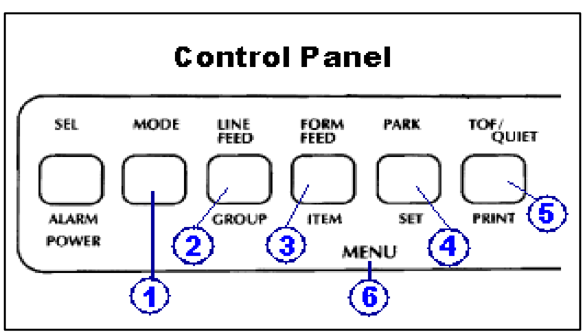
SET SHIFT+SET

Set-Up	7 or 8 Bits Data Word	8
Set-Up	Operator Panel Function	Full Operation
Set-Up	Reset Inhibit	No
Set-Up	Print Suppress Effective	Yes
Set-Up	Auto LF	No
Set-Up	Print DEL Code	No
Set-Up	Time Out Print	Valid
Set-Up	Auto Select	Yes
Set-Up	Centering Position	DEFAULT

7.5 Okidata ML320 / ML321

7.5.1 Control Panel: (ML320)

In Menu mode, use the front panel buttons to change the defaults for the printer parameters. The changes made in Menu mode are automatically saved when you exit Menu mode and are retained even if you turn the printer off.



1. **MODE:** Enters and exits Menu Mode.
2. **GROUP:** Prints the next Group. (Left-hand column)
3. **ITEM:** Prints the next Item in the Group. (Center column)
4. **SET:** Prints the next Setting for an Item. (Right-hand column)
5. **PRINT:** Prints a copy of all the Menu settings.
6. **MENU:** Lights when the printer is in Menu mode.

7.5.2 Entering and Exiting the Menu Mode: (ML320)

To enter or exit the Menu Mode, press **MODE**. The **MENU** light will light up.

7.5.3 Printing the Menu Settings: (ML320)

- Make sure the paper is loaded in the printer.
- Enter the Menu Mode (Press **MODE**).
- Press the **PRINT** (TOF/QUIET key).

7.5.4 Changing the Menu Settings: (ML320)

- Press **MODE** to enter Menu Mode.
- Use the **GROUP**, **ITEM** and **SET** keys to make your changes.
- Press **GROUP** until the Group you wish to change appears in the first column.
- Press **ITEM** until the Item you wish to change appears in the second column.
- Press **SET** until the Setting you want appears in the third column.
- Press **MODE** to exit the Menu Mode.

Important: If you turn the printer off without first exiting the Menu Mode, the changes you have made will be lost.

7.5.5 Resetting the Menu: (ML320)

To reset the Menu to the standard settings;

- Turn the printer off.
- Press **SEL** + **MODE** while turning the printer on.

7.5.6 Setting the Top of Form (TOF): (ML320)

Q-Lite is formatted for the printer's default 1" TOF. However some printers may need to have this adjusted slightly up or down.

When setting the TOF, load the printer with paper and use the red line on the paper shield as a reference guide.

Make sure the printer is deselected (**SEL** light is off).

Press and hold **TOF/QUIET**, then

Press **LINE FEED** to move TOF higher (paper moves down). Or

Press **FORM FEED** to move TOF lower (paper moves up).

Press **MODE** to re-select the printer.

7.6 Printer Drivers

You must have the proper Printer Driver for your Printer installed in Windows in order to print forms from Q-Lite.

You must be able to print a proper test page with the correctly installed Printer Driver from Windows. To print a test page from Windows click on the ***Start*** button, then ***Settings***, then ***Printers***, then Right Click on the correct Printer Driver. Click on ***Properties***, then ***Print Test Page*** in the **General** tab.

You must select **Legal** as the Paper Size and **Tractor** as the Paper Source in the **Paper** tab of the Printer Driver **Properties**.

For help installing or configuring Printer Drivers, call your Computer supplier or manufacturer.

7.7 Printer Ports

Some computers have their Printer (Parallel) port set to **ECP**. This may cause problems when printing to Okidata printers.

If you experience trouble when printing to your Okidata printer and your Printer Port is set to **ECP** you will need to set it to **SPP** (Standard Parallel Port) in the computer's **CMOS SETUP**. Consult your Computer supplier or manufacturer for assistance.

7.7.1 Q-Lite Printer Setup

After setting up the printer in Windows you will have to select the correct printer from within Q-Lite. This is done by clicking on the ***Printer Setup*** button in the Forms Print Menu. You will only have to do this once unless you change your default printer.

7.7.2 Q-Lite Printer Settings: (ML320)

These are the internal printer settings for Q-Lite.

Enter Menu Mode to verify or change your printer's settings with the settings listed below.

Highlighted Red and <u>Underlined</u> settings are required for proper printing.

Emulation Mode should be **Epson Fxe** and your Windows printer driver should be **Epson FX-286e** (see your windows manual for instructions on adding printers). Some printers may only give you ML, or IBM PPR, as your choices. If you use one of these, **your printing may not line up or might have some parts missing**.

Some Printer Models may look different.

Font	Print	Mode	Utility
Font	DRAFT	Mode	HSD
Font	Pitch		10 CPI
Font	Style		Normal
Font	Size		Single
<u>General Control</u>	<u>Emulation Mode</u>		<u>Epson Fxe</u>
<u>General Control</u>	<u>Graphics</u>		<u>Bi-directional</u>
General Control	Max Receive Buffer		Full
<u>General Control</u>	<u>Paper Out Override</u>		<u>Yes</u>
General Control	Print Registration		0
General Control	Operator Panel Functions		Full Operation
General Control	Reset Inhibit		No
General Control	Print Suppress Effective		Yes

General Control	CPU Compensation	Standard
Vertical Control	Line Spacing	6 LPI
Vertical Control	Form Tear-Off	Off
Vertical Control	Skip Over Perforation	No
Vertical Control	Auto LF	No
Vertical Control	Auto CR	No
Vertical Control	Auto Feed XT	Invalid
Vertical Control	Page Length	17 "
Vertical Control	Cut Sheet Page Length	17 "
Symbol Sets	Character Set	Set I
Symbol Sets	Language Set	American
Symbol Sets	Zero Character	Slashed

7.8 Fujitsu DL Series Printers

For tech support, call Fujitsu tech support Canada (800) 263-7091

7.8.1 FUJITSU DL 3800

7.8.1.1 Install DL3600 Driver

See your windows or printer manual for instructions on installing printer drivers.

7.8.1.2 Reset Factory defaults

Turn Off

Press Lock, Font and Menu while turning on and wait for beep.

7.8.1.3 Change to Auto Load

Off Line

Press Font and Menu for setup mode

Press Lock to go to config

Press Font to Cut Load

Press Lock to move to Auto

Press Font to Load Time

Press Lock to 2 sec.

Press On Line to return to Function

Save and End

Press Menu to leave Menu.

7.8.1.4 Change Load Position

Press and hold Online during the entire process.

Press Micro-up/down

Press Save Top to save setting

7.8.2 FUJITSU DL 345

7.8.2.1 Reset Factory defaults

Turn Off

Press Online and Mode while turning on.

7.8.3 FUJITSU DL 3400

7.8.3.1 Reset Factory defaults

Turn Off

Press Online and Mode while turning on.

7.8.3.2 Change Load Position

Press Mode

Press Mode to TOF

Press FF to select

Press Mode to 1”

Press Online then FF to save.

7.8.4 FUJITSU DL 1250

7.8.4.1 Reset Factory defaults

Turn Off

Press Online and Menu while turning on.

7.8.5 FUJITSU DL 2400

7.8.5.1 Reset Factory defaults

Turn Off

Press Reset while turning on.