

# QUANTECH





# Table of Contents

1	Quantech QMenus .....	3
1.1	Why use Menu Selling? .....	3
1.2	QMenus: Features .....	3
2	Getting Started .....	4
2.1	Deal Types .....	4
2.2	Deal Defaults .....	4
2.3	Tax Defaults.....	4
3	How to Build Menus.....	5
3.1	F&I Menu Items.....	5
3.1.1	Insurance Items .....	6
3.1.2	Other F&I Items .....	6
3.2	F&I Menu Groups.....	7
3.3	F&I Menu Templates.....	10
4	Deals .....	12
4.1	Current Deal.....	13
4.2	Creating a Deal .....	14
5	Applying a Menu to a Deal.....	15

# 1 Quantech QMenus

**QMenus** is a software database program with a unique presentation tool using F&I Menu Selling. The use of a menu to sell F&I products ensures that every customer is being offered every product, every time.

**QMenus** can dramatically reduce the amount of time customers spend in the F&I office, increase your F&I profits and reduce charge-backs while focusing on your customers needs.

**QMenus** is a standalone program that works with any DMS or F&I software.

## 1.1 Why use Menu Selling?

Menu Selling is much more effective than traditional Step Selling. A consistent presentation of all product offerings on a Menu is vital to higher F&I sales. Dealers using menu presentations in which all F&I choices are presented in an efficient, professional manner, are reporting not only that the menu increases per-vehicle dollar sales and penetration marks, but it's also a customer satisfaction booster. Customers choose the menu plan and monthly payment that works best for them. Menu Selling is Dialog Selling where the customer is involved in the decision-making.

## 1.2 QMenus: Features

- ◆ Fully automated Menu Selling Solution for Finance, Lease and Cash deals
- ◆ Simple step-by-step setup
- ◆ Each Item, Group or Menu can be customized
- ◆ Unlimited number of Menu Items with descriptions
- ◆ Unlimited number of Groups and Menus
- ◆ Items can be added or removed from menus and edited on the fly
- ◆ Custom disclosures for each menu
- ◆ Color-coded Menus for easy presentation
- ◆ Payment Roll Back Function for Finance and Lease deals
- ◆ Menu generated for customer presentation in under a minute!


## 2 Getting Started

Before you begin to build your Menus, set your Defaults to be used when creating a deal. From the HOME page set your Deal Types, Deal Defaults and Tax Defaults by clicking on the corresponding button located in the Button Bar at the top of the screen.



**Note:** All default settings can be changed in any deal at any time.

### 2.1 Deal Types

Click on the  button to enter your Finance and Lease defaults. There are no default settings available for a Cash Deal.

### 2.2 Deal Defaults

Select the Default Deal Type from the drop-down menu. This selection should be the type of deal that will be used the most. Once in a deal, the Deal Type can be changed. Select your setting preferences for Payments per Year and your menus from the drop down menus.

### 2.3 Tax Defaults

Set your tax percentages and check off all appropriate tax settings.

### 3 How to Build Menus

Menus are made up of **Groups** of **F&I Items**, or products. Items are entered first, then added to Groups. Groups are then entered into Menus.

Payment Options		Finance Deal	
Prepared for: Mr. Customer		2007 GMC Hummer	
Date: May 9, 2007	Stock #: 222	VIN: 123456789ABC98765	Type: NEW
		Rate: 3.9 %	Term: 60 Mo.
		Amount Financed: \$80,635.53	Am: 60 Mo.
		Base Payment: \$1,481.39	

PLATINUM	GOLD	SILVER	STANDARD
Life Joint Life coverage for both Buyer and Co Buyer.	Life Single Life Insurance on the Buyer	Life Single Life Insurance on the Buyer	Life Single Life Insurance on the Buyer
A/H Single 7day Accident and Health coverage on Buyer. 7day retroactive.	A/H Single 30 day Accident and Health coverage on Buyer. 30 day retroactive.	A/H Single 30 day Accident and Health coverage on Buyer. 30 day retroactive.	GAP Covers shortfall to pay out loan in case of total loss.
CI Single Critical illness coverage for Buyer.	CI Single Critical illness coverage for Buyer.	GAP Covers shortfall to pay out loan in case of total loss.	Extended Warranty Extended warranty program
GAP Covers shortfall to pay out loan in case of total loss.	GAP Covers shortfall to pay out loan in case of total loss.	Extended Warranty Extended warranty program	Window Etching Theft deterrent system.
Extended Warranty Extended warranty program	Extended Warranty Extended warranty program	Window Etching Theft deterrent system.	
Window Etching Theft deterrent system.	Window Etching Theft deterrent system.		
Pro Pack Protection package. Includes paint protection, Undercoating and fabric protection.	Pro Pack Protection package. Includes paint protection, Undercoating and fabric protection.		
Monthly Pmt: \$1,974.00	Monthly Pmt: \$1,811.52	Monthly Pmt: \$1,715.55	Monthly Pmt: \$1,588.47

To build your Menus begin by clicking on



#### 3.1 F&I Menu Items



Click on *Item Templates* in the Button Bar. Enter all **Items** that are sold in the F&I Office that you want to have included in your menus. To begin entering items:

### 3.1.1 Insurance Items

Click on to add an insurance item to the list.

Name the item in the Current Item field. Select the insurance **Sort, Company, Type, Sub-Type** (if applicable), **Retro** (if A&H was selected) and **Applicant**. A red Valid tag will appear once valid selections have been made. Type in the sales description of this item in **Item Details**. When this

screen has been completed, click the **Save** button. Continue to add all insurance items to your list in this manner until all options have been entered.

**Important Note:** If you are entering more than one Insurance Company or Insurance Type you must differentiate the Company and/or Type in the **Current Item** name. When building your Groups only one Insurance Company or Insurance Type is permitted in the same Group.

**Tip:** Do not use all upper case (Caps Lock) when entering your descriptions as they will be more difficult for your customer to read.

### 3.1.2 Other F&I Items

Click on to add each non-insurance F&I item to the list.

Name the item in the **Current Item** field. Select the **Item Product Type** from the drop-down menu. In **Item Details** type in the sales description for this item and enter in your retail price. When this screen has been completed, click the **Save** button.

Continue to add Other Items to your list until all F&I products have been entered.

**TIP:** As there are so many variables and prices with Extended Warranties it is recommended that you enter only one Extended Warranty Item and then edit the price in the deal once you know what your customer is purchasing.

Please refer to the ‘Sample Menus’ that you received with your software package for Item description suggestions.

A completed F&I ITEM TEMPLATE screen might look something like this:

F&I Item Templates			
Menu Templates		Group Templates	Item Templates
Item Name	Details	Price	Edit Item Copy Item Delete Item
\$100 Gift Certificate	Other, Other F&I	\$0.01	Edit Copy Delete
\$50 Gift Certificate	Other, Other F&I	\$0.01	Edit Copy Delete
Alarm System	Other, Security	\$266.00	Edit Copy Delete
Critical Illness	Insurance, Your Ins Co, CI, BUYER, Preferred Ins		Edit Copy Delete
Critical Illness Joint	Insurance, Your Ins Co, CI, JOINT, Preferred Ins		Edit Copy Delete
Etching	Other, Etching	\$250.00	Edit Copy Delete
Ext Warranty	Other, Warranty	\$1,599.00	Edit Copy Delete
Ext Warranty - Powertrain	Other, Warranty	\$1,199.00	Edit Copy Delete
GAP	Other, GAP	\$366.00	Edit Copy Delete
Loan Coverage	Insurance, Your Ins Co, Life, BUYER, Preferred Ins		Edit Copy Delete
Loan Coverage Joint	Insurance, Your Ins Co, Life, JOINT, Preferred Ins		Edit Copy Delete
Maintenance Pack 3 yr	Other, Maintenance	\$599.00	Edit Copy Delete
Maintenance Pack 5 yr	Other, Maintenance	\$725.00	Edit Copy Delete
Payment Protection 30R	Insurance, Your Ins Co, A&H, BUYER, Preferred Ins, 30 day		Edit Copy Delete
Payment Protection 30R J	Insurance, Your Ins Co, A&H, JOINT, Preferred Ins, 30 day		Edit Copy Delete
Payment Protection 7R	Insurance, Your Ins Co, A&H, BUYER, Preferred Ins, 7 day		Edit Copy Delete
Payment Protection 7R J	Insurance, Your Ins Co, A&H, JOINT, Preferred Ins, 7 day		Edit Copy Delete
ProPack Complete	Other, ProPack	\$1,595.00	Edit Copy Delete
ProPack Fabric	Other, ProPack	\$295.00	Edit Copy Delete
ProPack Paint	Other, ProPack	\$799.00	Edit Copy Delete
ProPack Paint/Fabric	Other, ProPack	\$999.00	Edit Copy Delete
ProPack Rust	Other, ProPack	\$399.00	Edit Copy Delete
ProPack Rust/Undercoat	Other, ProPack	\$677.00	Edit Copy Delete
ProPack Undercoat	Other, ProPack	\$499.00	Edit Copy Delete

Items can be edited, copied or removed from the list at any time.

Once all **Items** have been entered you are now ready to put them into **Groups**.

### 3.2 F&I Menu Groups

Build your **Groups** by adding selected Items from the Items List. Click on *Group Templates* in the Button Bar.



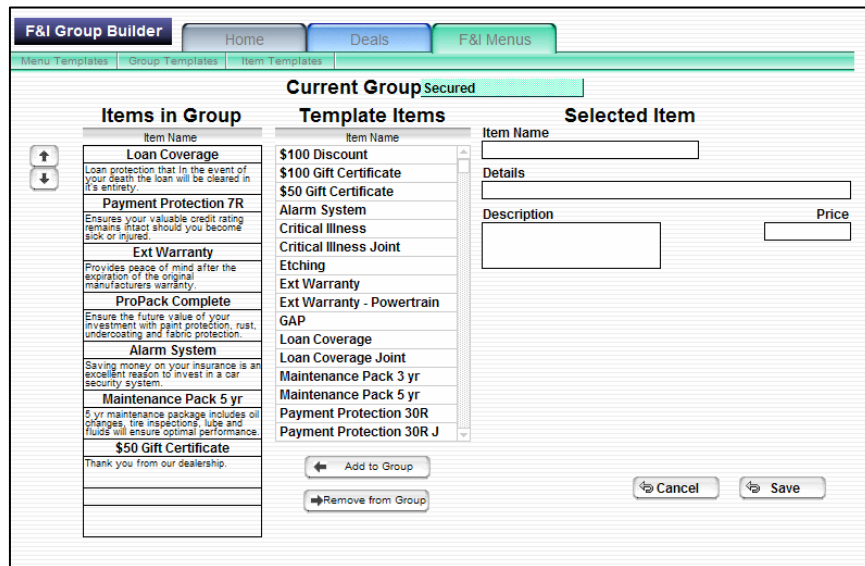
Then click on .

This opens a blank F&I GROUP BUILDER screen with all items from the Item List listed in the **Template Items** column. Name this Group by entering a name in the Current Group field. Select an Item and click . Continue adding your selections in the order you want them to appear in your Group.

**Note:** Only one item of any given product type can be in the same group.

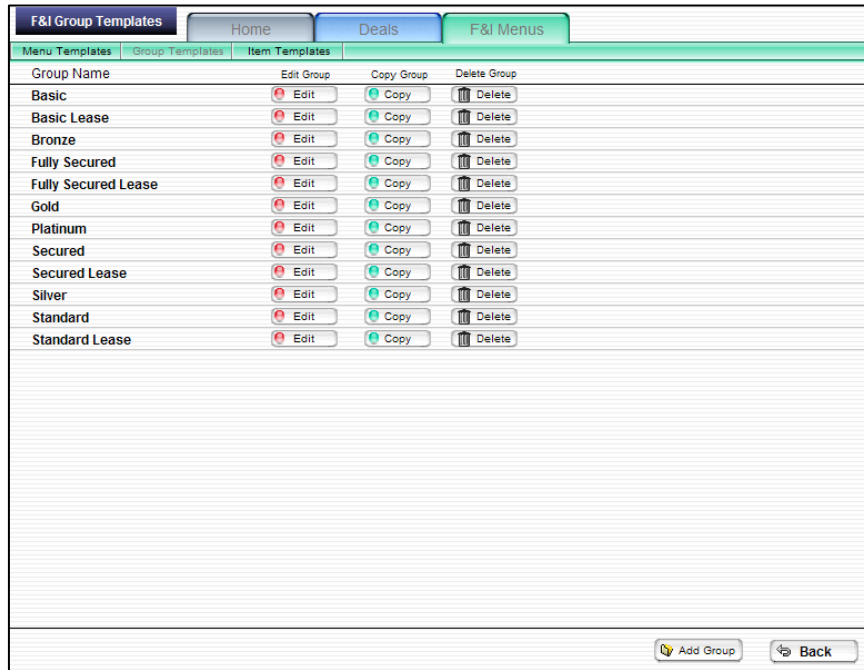
**Tip:** When naming your groups be sure to name them so you can easily recognize which groups will be included in a Cash, Lease or Finance menu.

A completed F&I GROUP BUILDER screen might look something like this:





Items can be removed from the Group by selecting the item in the Group and clicking the **Remove from Group** button. Items can be placed in any order in the group by selecting the item in the Items in Group column and using the up/down arrows. Once this Group is complete click the **Save** button. Continue to build your Groups in this manner.

A completed F&I GROUP TEMPLATE screen might look something like this:



Group Name	Edit Group	Copy Group	Delete Group
Basic			
Basic Lease			
Bronze			
Fully Secured			
Fully Secured Lease			
Gold			
Platinum			
Secured			
Secured Lease			
Silver			
Standard			
Standard Lease			

Groups in this list can be edited, copied or removed from the list at any time.

Once 4 **Groups** have been created you are now ready to put them into one **Menu**.

**TIP:** Build 4 Groups at a time. After each four, proceed to your Menu Templates screen to enter those four Groups into one Menu, then go back to your Group Templates and create 4 new Groups for another Menu. Continue until you have all of your Menus created.

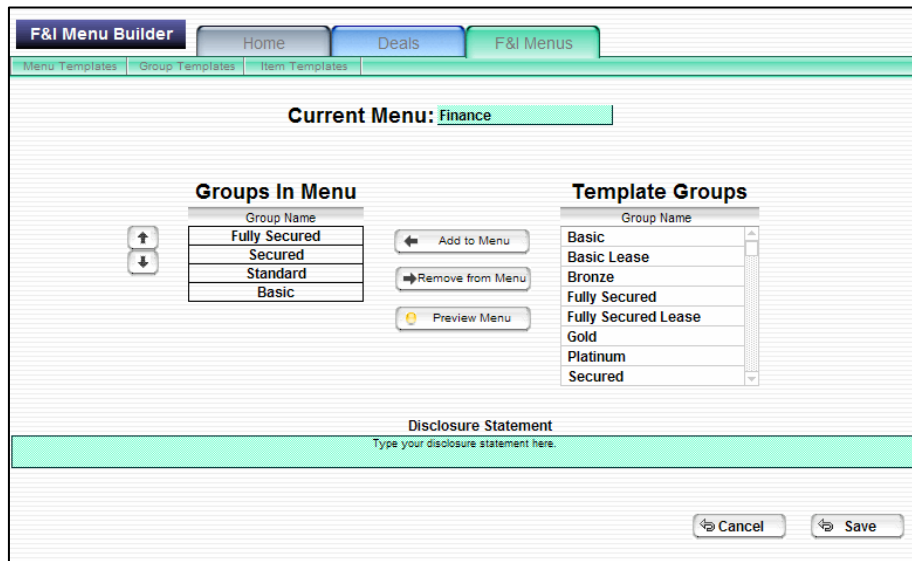
Please refer to the ‘Sample Menus’ that you received with your software package for Group name suggestions.

### 3.3 F&I Menu Templates

To begin building F&I Menus, click on *Menu Templates* in the Button Bar.



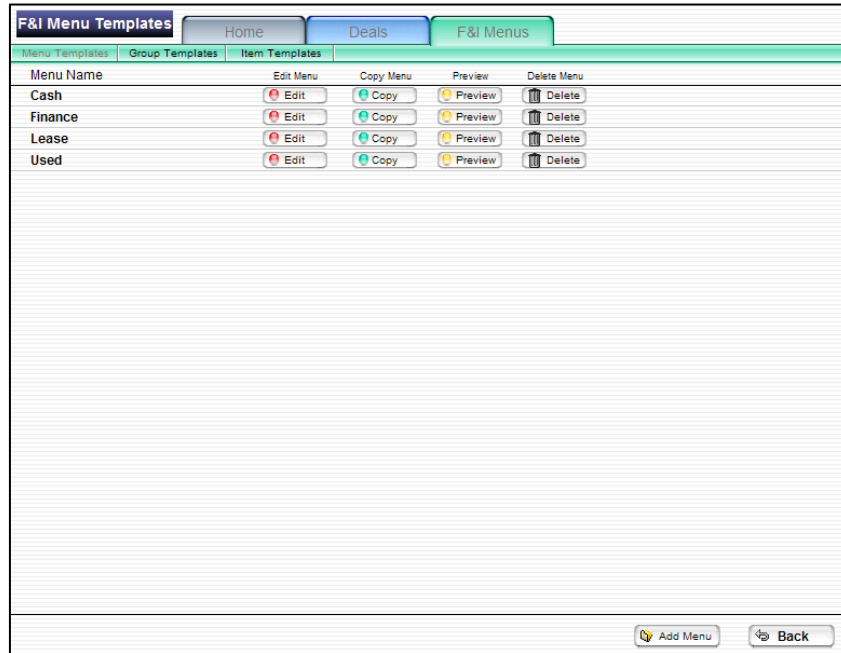
Click . Name the Current Menu. Select a Group to be included in this Menu from the Template Groups column, then click . Continue to add up to 4 Groups to this Menu. Type in your Disclosure Statement.



Once this Menu is complete, click the *Save* button. Continue to build all Menus in this manner.

**TIP:** Add your Groups in the order you want them to appear in your Menu. We suggest starting with the most complete package and ending with your basic coverage.

A completed F&I MENU TEMPLATES screen might look something like this:



Click on the 'Preview' button to ensure your menu looks the way you intended.

Building Menus is a one time effort, any Menu, Group or Item can be edited, added or deleted at any time.

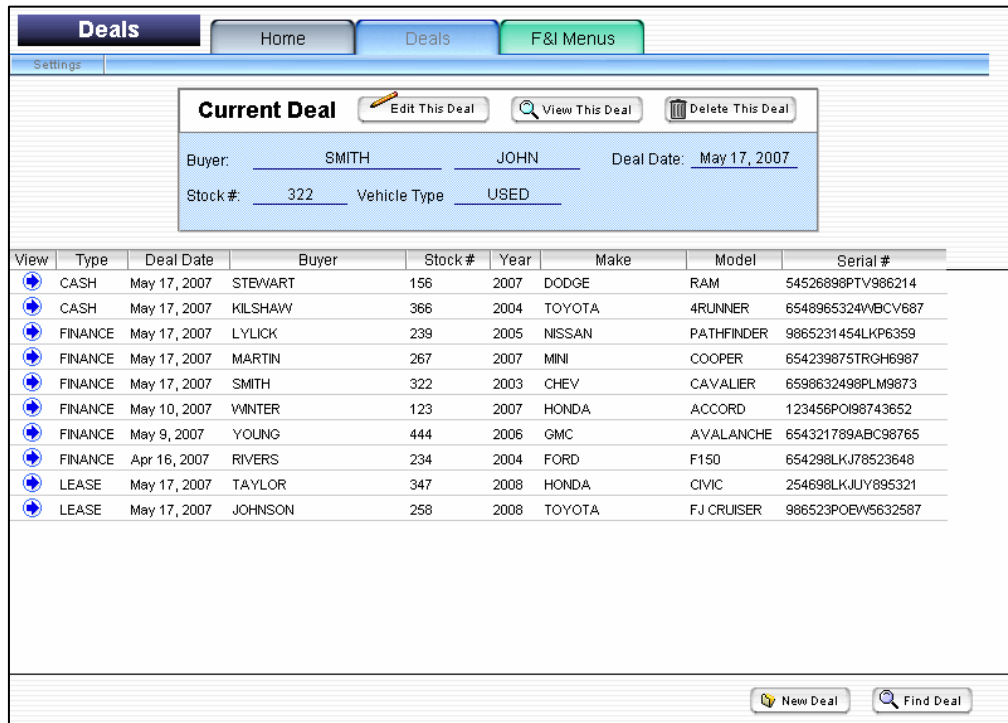
Once the Menus are complete they can now be applied to a deal.

Please refer to the 'Sample Menus' that you received with your software package for Menu suggestions.


## 4 Deals

From the HOME page, click on the  tab. This opens the DEALS Database where all of your Deals are listed and stored.

From this page, deals are entered, viewed, edited or deleted.



View	Type	Deal Date	Buyer	Stock#	Year	Make	Model	Serial #
	CASH	May 17, 2007	STEWART	156	2007	DODGE	RAM	54526898PTV986214
	CASH	May 17, 2007	KILSHAW	366	2004	TOYOTA	4RUNNER	6548965324WBCV687
	FINANCE	May 17, 2007	LYLICK	239	2005	NISSAN	PATHFINDER	9865231454LKP6359
	FINANCE	May 17, 2007	MARTIN	267	2007	MINI	COOPER	654239875TRGH6987
	FINANCE	May 17, 2007	SMITH	322	2003	CHEV	CAVALIER	6598632498PLM9873
	FINANCE	May 10, 2007	WINTER	123	2007	HONDA	ACCORD	123456POI98743652
	FINANCE	May 9, 2007	YOUNG	444	2006	GMC	AVALANCHE	654321789ABC98765
	FINANCE	Apr 16, 2007	RIVERS	234	2004	FORD	F150	654298LKJ78523648
	LEASE	May 17, 2007	TAYLOR	347	2008	HONDA	CIVIC	254698LKJUY895321
	LEASE	May 17, 2007	JOHNSON	258	2008	TOYOTA	FJ CRUISER	986523POEW5632587

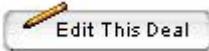
Clicking on  will open a new EDIT FINANCE DEAL screen, EDIT LEASE DEAL screen or an EDIT CASH DEAL screen, depending what was set in your **Deal Defaults**.

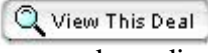
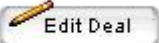
Clicking on  will open the DEALS – FIND screen. This screen allows you to search for a deal by any of the criteria fields available.


## 4.1 Current Deal

This section contains the basic information relating to a specific deal. To move a deal into the Current Deal window, locate it in the list at the bottom of the screen and click on it. Once a deal is in the **Current Deal** window you have several options.




 **Edit This Deal** button will open the EDIT FINANCE DEAL, EDIT LEASE DEAL or EDIT CASH DEAL screen, depending on the deal type.

 **View This Deal** button will open the FINANCE DEAL, LEASE DEAL or CASH DEAL screen depending on the deal type. These screens are in View Mode only. Once on these screens, click on  **Edit Deal** if you want to switch from view mode to edit mode.

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

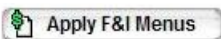
**Note:** Once a deal has been deleted – it cannot be retrieved.

## 4.2 Creating a Deal

From the DEALS screen, click on  . This will open a new EDIT FINANCE DEAL screen, EDIT LEASE DEAL screen or an EDIT CASH DEAL screen, depending what was set in your Deal Defaults. The deal type can be changed by clicking on Cash, Finance or Lease Deal.

Enter the name of the Customer and Vehicle information. Select the Type from the drop-down box.

Adjust any Finance (term, amortization and rate) or Lease settings (term, rate and residual). Enter the Base Payment from your DMS or F&I software.

Click on  .

**Note:** You can adjust payment frequency, tax and other settings for this deal by clicking on the 'Settings' button located in the button bar at the top of the page



## 5 Applying a Menu to a Deal

You will now be on the Menus workscreen. Any editing you do on this screen will affect this deal only and will not change your templates.

Under the 'Menu Templates' column is a list of all the Menus that you have created. Select the Menu to be presented to your customer from 'Menu Templates' by clicking on it. Once you select a Menu, the software will then make a 'copy' and list it in the 'Applied Menu' column as well as complete the page with your selection.

**Tip:** Renaming the Applied Menu when prompted is a good habit to get into. It will make it easier to access your menu later particularly if you present the same menu type with different finance or lease terms.

**F&I Menus: Finance** | Home | Deals | **F&I Menus**

Settings

Buyer: MARTIN, JOAN  
 Unit: 2007 MINI COOPER  
 Stock #: 267 Type: NEW

Menu Templates: Finance, Lease, Cash, Used  
 Applied Menu: Finance.Copy

Amount Financed: \$33,641.60 | Base Payment: \$603.00 | Pmts/Yr: 12

Applied Menu: Finance.Copy (Menu Declined)


Fully Secured.	Secured.	Standard.	Basic.
Loan Coverage.	Loan Coverage.	Loan Coverage.	Loan Coverage.
Critical Illness.	Payment Protection 7R.	Payment Protection 30R.	Ext Warranty - Powertrain.
Payment Protection 7R.	Ext Warranty.	Ext Warranty.	ProPack Rust.
Ext Warranty.	ProPack Complete.	ProPack Rust/Undercoat.	
ProPack Complete.	Alarm System.	Tire & Rim Protection 5yr.	
Alarm System.	Maintenance Pack 5 yr.		
Maintenance Pack 5 yr.	\$50 Gift Certificate.		
\$100 Gift Certificate.			
Payment: <b>\$835.89</b>	Payment: <b>\$801.66</b>	Payment: <b>\$702.52</b>	Payment: <b>\$656.87</b>

Payments [ + ] [ - ] [ Edit ] [ Copy ] [ Delete ] [ Print ] [ Present ] [ Back ]

At this point Menus, Groups and Items can be edited.


To make changes to your menu, do as follows:

<b>Secured.</b>
Life.
Critical Illness.
Disability 7 Day Retro.
Ext Warranty.
ProPack Complete.
Maintenance Pack 5 yr.
Bonus.

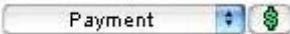
 **To add or remove an item from a Group**, click on the group heading. Select the item you want to remove and click on ‘Remove from Group’. Then select the item you want to include and click ‘Add to Group’. Once you have finished editing the group click ‘Save’.


**Tip:** It is a good habit to always remove items first. If the item to be replaced is of the same product type (i.e., replacing single life insurance with joint life insurance), the software will not allow two of the same product types in the same group.

<b>Secured.</b>
Life.
Critical Illness.
Disability 7 Day Retro.
Ext Warranty.
ProPack Complete.
Maintenance Pack 5 yr.
Bonus.

 **To edit a specific item**, such as change the price of an Extended Warranty, click on the Item name, change the price and click ‘Save’.

**To edit an entire Menu**, click on  **Edit** . This opens the F&I Menu Builder screen where entire Groups can be removed and added.

Your choice of payment totals and options are available by making your selection from the drop down box  and clicking on the \$ sign.

The selected Applied Menu can be duplicated, renamed and edited by clicking on  **Copy** .

Delete the selected Applied Menu by clicking on the Delete button.


To preview the menu, click on the ‘Present’ button.

The Applied Menu can now be printed and presented to your customer for their selection. This is a sample of what a printed menu should look like:

Payment Options		Quantechsoftware Inc.		Finance Deal	
Prepared for: JOAN MARTIN				2007 MINI COOPER	
Date: May 17, 2007	Stock #: 267	VIN: 654239875TRGH6987	Type: NEW	Pmts/Yr: 12	
Zoom	Amount Financed: \$33,641.50	Term: 60 Mo.	Am: 60 Mo.	Rate: 2.9 %	Base Payment: \$603.00
<b>Fully Secured.</b>	<b>Secured.</b>	<b>Standard.</b>	<b>Basic.</b>		
Loan Coverage.	Loan Coverage.	Loan Coverage.	Loan Coverage.		
Loan protection that in the event of your death the loan will be cleared in it's entirety.	Loan protection that in the event of your death the loan will be cleared in it's entirety.	Loan protection that in the event of your death the loan will be cleared in it's entirety.	Loan protection that in the event of your death the loan will be cleared in it's entirety.		
<b>Critical illness.</b>	<b>Payment Protection 7R.</b>	<b>Payment Protection 30R.</b>	<b>Ext Warranty - Powertrain.</b>		
Should you be diagnosed with a specified illness and survive 30 days, your loan will be paid in full.	Ensures your valuable credit rating remains intact should you become sick or injured.	Ensures your valuable credit rating remains intact should you become sick or injured.	Major component coverage after the expiration of the original manufacturers warranty.		
<b>Payment Protection 7R.</b>	<b>Ext Warranty.</b>	<b>Ext Warranty.</b>	<b>ProPack Rust.</b>		
Ensures your valuable credit rating remains intact should you become sick or injured.	Provides peace of mind after the expiration of the original manufacturers warranty.	Provides peace of mind after the expiration of the original manufacturers warranty.	Ensure the future value of your investment with rust inhibitor that protects against the harsh elements.		
<b>Ext Warranty.</b>	<b>ProPack Complete.</b>	<b>ProPack Rust/Undercoat.</b>			
Provides peace of mind after the expiration of the original manufacturers warranty.	Ensure the future value of your investment with paint protection, rust, undercoating and fabric protection.	Undercoating and rust inhibitor will ensure a quiet ride and protection from the harsh elements.			
<b>ProPack Complete.</b>	<b>Alarm System.</b>	<b>Tire &amp; Rim Protection 5yr.</b>			
Ensure the future value of your investment with paint protection, rust, undercoating and fabric protection.	Saving money on your insurance is an excellent reason to invest in a car security system.	Protects your tires and rims from road hazard damage such as: construction debris, cracks, glass, potholes & nails.			
<b>Alarm System.</b>	<b>Maintenance Pack 5 yr.</b>				
Saving money on your insurance is an excellent reason to invest in a car security system.	5 yr maintenance package includes oil changes, tire inspections, lube and fluids will ensure optimal performance.				
<b>Maintenance Pack 5 yr.</b>	<b>\$50 Gift Certificate.</b>				
5 yr maintenance package includes oil changes, tire inspections, lube and fluids will ensure optimal performance.	Thank you from our dealership.				
<b>\$100 Gift Certificate.</b>					
Thank you from our dealership.					
Payment	\$835.89	Payment	\$801.66	Payment	\$702.52
				Payment	\$656.87

Although it is recommended that you present the Menu to your customer on a printed colour copy, the **Zoom** button in the upper left hand corner will allow you to zoom to full screen for presentations off your monitor. The **Back** button in the upper right hand corner will return you to the menus workscreen.

After your menu presentation, should the customer wish to add or delete an Item from a Group, follow the instructions on the previous page.

Once the customer has made their selection and all editing (if any) has been completed, click on the corresponding blue arrow . The items and dollar values of that Menu selection will be incorporated into the deal. Click on 'Save Changes'.

**Note:** Once you have left a deal you can return to it and continue to work on the 'Applied Menu' by clicking on the menu in the 'Applied Menus' column. All of your previous changes were automatically saved. Or, you can select a new Menu from you 'Menu Templates' column.

**Note:** There are two different methods to enter the dollar values from QMenus into your DMS F&I program.

- 1) Individual values of F&I products sold can be pasted into your F&I program by first clicking on the dollar amount in the F&I Products column on your deal screen. Clicking on the dollar amount automatically copies that amount to your clipboard, then in your F&I Program use the 'control V' command to paste that amount into the appropriate field. Continue copy/pasting until all values are entered into your F&I program. Insurances amounts cannot be pasted and will need to be set in your F&I software as usual. After all products are pasted the payment from QMenus will match the payment on your DMS.
- 2) After the deal has been saved in QMenus, simply print off a copy of the deal and enter the amounts in your F&I software.