Q·F&I

Quick Start Guide

1. From the HOME page set your **Bank Preferences**.
2. Set your **Defaults** (Deal, Insurance, Inventory & Tax).

How to Create a NEW Deal

To go to the **Deal** File, click on Deals .

3. To create a Finance or Cash deal, click on New Finance or Cash Deal .
4. To create a Lease deal, click on New Lease Deal .
5. Click Add Buyer, enter buyer information, then click Back .
6. Add Co-Buyer if applicable.
7. Click on Browse to enter vehicle information, then click Back .
8. Enter dollar values, adjust any finance, insurance, extended warranty and other settings, if necessary, using applicable fields, drop down lists and menus. Select/Edit Business Manager & Salesperson Al Starr .
9. Enter any **Trades** and/or **Accessories** info, if any, by clicking on ➔.
10. Any adjustments or Default settings that cannot be changed on the Edit Finance Deal screen can be edited in the **Settings** screen.

11. Any **Insurance** settings that cannot be changed on the Edit Finance Deal screen can be edited by clicking on the corresponding **Blue Arrow** ➔ .
12. When deal is complete, click Save Changes . Saved info can be edited at any time.
13. Once the deal has been saved, go to **Disclosure** (or **Work Sheet** if Lease deal) to verify amounts.

Once verified, click Back .

14. To print your documents, click on Print Forms . Select forms for printing and follow the prompt screens.
15. When your deal is fully completed, click on Deliver . Delivering a deal will change your deal from Pending to Delivered Status on the **Deals** screen. This will also remove the sold unit(s) from inventory and will add any trade(s) to inventory.