Menu Quick Start

1. From the HOME page set your **Defaults** and **Deal Types** located in the button bar.

How to Build Menus

F&I Menus are made up of **4 Groups** that are made up of **F&I Items**.

Begin by entering in all F&I Items that you offer:

2. Click on F&I Menus . To begin entering your **Items**, click on ***Item Templates*** in the button bar.

3. Click Add Insurance Item . Name the **Current Item**. Select **Insurance Type** settings from the drop-down boxes. Type in your **Description**. Click Save . Continue to add all **Insurance Items** to be included in the Menus.

4. Click Add Other Item . Name the **Current Item**. Select **Item Product Type** from the drop-down box. Type in the **Description** and **Price**. Click Save . Continue to add all **Other Items** to be included in the Menus. Once the **Items** list is complete they can now be put into **Groups**.

Next, put your Items into 4 Groups:

5. To begin building your Groups, click on ***Group Templates*** in the button bar.

6. Click Add Group . Name the Current Group (i.e. Fully Secured, Secured, Partially Secured or Basic). Select an Item to be included in this Group from the **Template Items** column, then click Add to Group . Continue to add up to 8 Items to this Group. Once this Group is complete, click Save . Continue to build all 4

Groups to be included in one Menu. Once you have created 4 **Groups** they can now be entered into a **Menu**.

Then, put your 4 Groups into 1 Menu:

7. To build a Menu, click ***Menu Templates*** in the button bar. Click Add Menu . Name the Current Menu (i.e. Cash, Finance, Lease or Used). Select a Group to be included in this Menu from the **Template Groups** column, click Add to Menu . Select and add your 4 groups in the order you want them appear in your menu. Type in your Disclosure Statement. Click Save . **NOTE:** Create as many Menus as you choose, however we suggest you start with one or two until you become more familiar with the program. ***Remember for each Menu you must first create 4 Groups.*** Building Menus is a one time effort, and any Item, Group or Menu can be edited, added or deleted at any time. Now that you've created a Menu you are ready to apply it to a deal.

How to Apply a Menu to a Deal

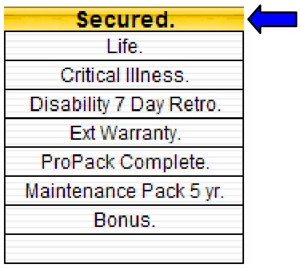
Create a New Deal by:

1. From the HOME page, click on Deals , then click on New Deal .
2. Select Cash, Finance or Lease Deal. For this illustration we'll use a Finance Deal.
3. Enter Customer name and Vehicle information.
4. In the **'Quick Menu'** section, enter Term, Amortization, Rate and Base Payment.
5. Click on Apply F&I Menus .

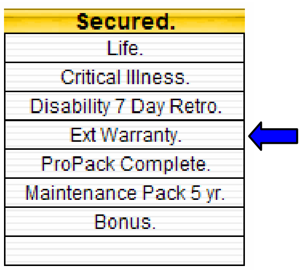
To apply and edit a Menu:

6. In the upper right hand corner of the screen, select a Menu from **Menu Templates** by clicking on it. The software generates a 'copy' of the Menu Template and lists it under **Applied Menus**. *Please note that any changes made to a menu when you are in a deal will not affect your original Menu Template.*

7. This is a sample of a Group. To make changes to your menu do as follows:



To add or remove an item to or 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 add and click on Add to Group . Once you have finished editing your Group, click Save .



To change the price of a specific item, click on the item. Change the price and click Save .

8. Click on Print to generate an actual menu to present to your customer.

9. Once you have completed any final changes for the customer (i.e. remove Single Life Coverage and add Joint Life Coverage) select the chosen group by clicking on the blue arrow to the left of the group heading.

10. Click on Save Changes .

11. Click Print to generate a hard copy of the deal for your records.