

Section 2.3 – Creating a Dealer Trade

Creating a Dealer Trade

Begin by accessing the Dealer Trade Screen.

- Log on MPK
- Select 'Vehicle Sales'
- Select 'Dealer Trade'

From there, your screen will either start as a new dealer trade as shown above or bring up a previous dealer trade. In order to create a new dealer trade if a previous deal appears, place your cursor anywhere in the dealer trade screen and press F3. Your screen should clear out as shown above. Once you click, tab, or enter anywhere in the screen a deal number will be assigned.

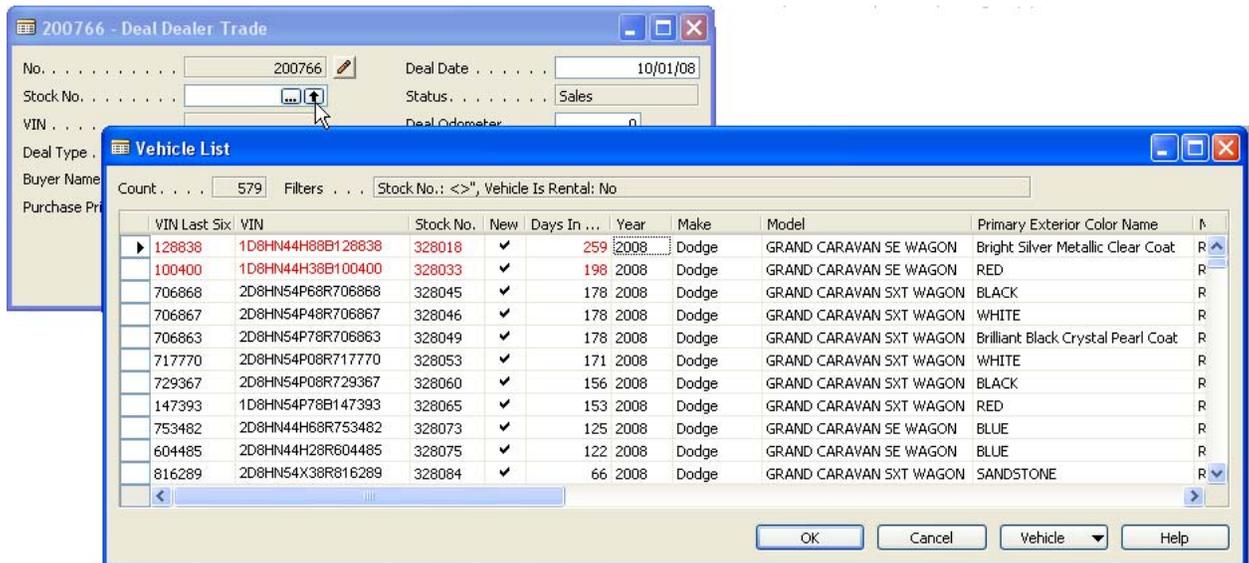
Searching for a Particular Stock Number

There are different ways to search for a stock number.

- In most cases of doing a dealer trade, you are going to know the stock number and can simply enter that information into the 'Stock No.' field.
- If you don't know the stock no then you can click on the up arrow  and a vehicle list will appear. You can click in any field and search on it depending upon what information you have and once you click in the field a find box will appear where you can type the information you are looking for.

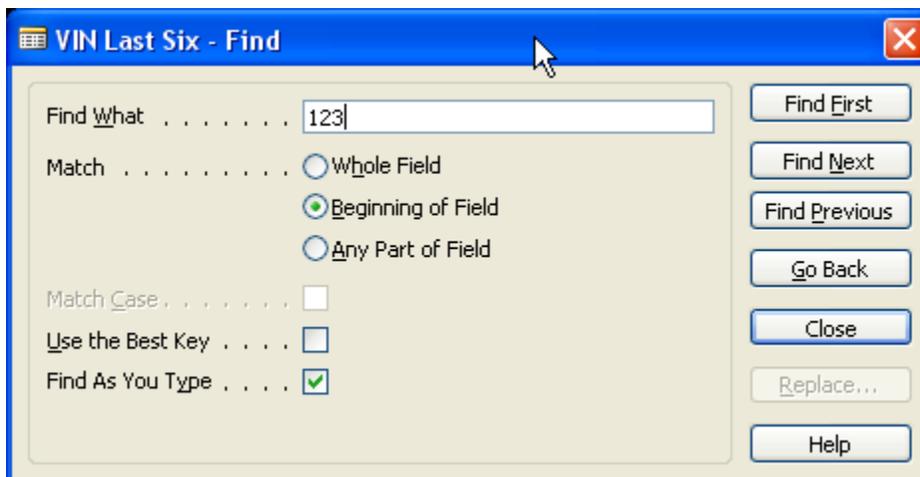
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- Another way of searching is using the 'Find' option within the vehicle list. Every column within the vehicle list is searchable simply by clicking in the particular field you want to search/find in and begin typing what it is you are looking for.



Within the 'find box' you have some different search options as well:

- Whole Field – Means whatever value you typed in 'Find What' will go and find an exact match
- Beginning of Field – This will find whatever begins with the value you entered into the 'Find What' field
- Any Part of Field – This will find anything that contains the value you entered into the 'Find What' field





HELPFUL HINT: You will also notice that in the blue section of the 'Find' box it will tell you what field you are searching in at all times. Another option you want to make sure is marked when using the 'Find' box is the 'Find as You Type' checkbox. This allows the information you are searching for to appear as you are typing your selection in the 'Find What' field.

Searching for a Specific Customer

There are different ways to search for a customer:

- Customer full name – In the Customer Name field, type in the partial or full customer's first and last name. Example = to search for Jane Doe, you can type in "Jane Doe" or "Ja Do". The system will bring up any customer in the database that the first name starts with "Ja" and the last name starts with "Do". Once you find the specific customer, select them (by either double-clicking, single-clicking and pressing the "OK" button, or using the arrow keys on the keyboard and pressing Enter). Once you select them, it will bring you to a list of vehicles that are assigned to that customer.
- Customer last name – In the Customer Name field, use the asterisk (*) for a wildcard search before the customer's last name. Example = to search for Jane Doe, you would type in "* Doe". The system will bring up any customer in the database with the last name that starts with "Doe". Once you find the specific customer, select them (by either double-clicking, single-clicking and pressing the "OK" button, or using the arrow keys on the keyboard and pressing Enter). Once you select them, it will bring you to a list of vehicles that are assigned to that customer.

Adding a New Customer

If the customer is someone whom you have never dealer traded with and you need to add them, you will still start off by searching for them first.



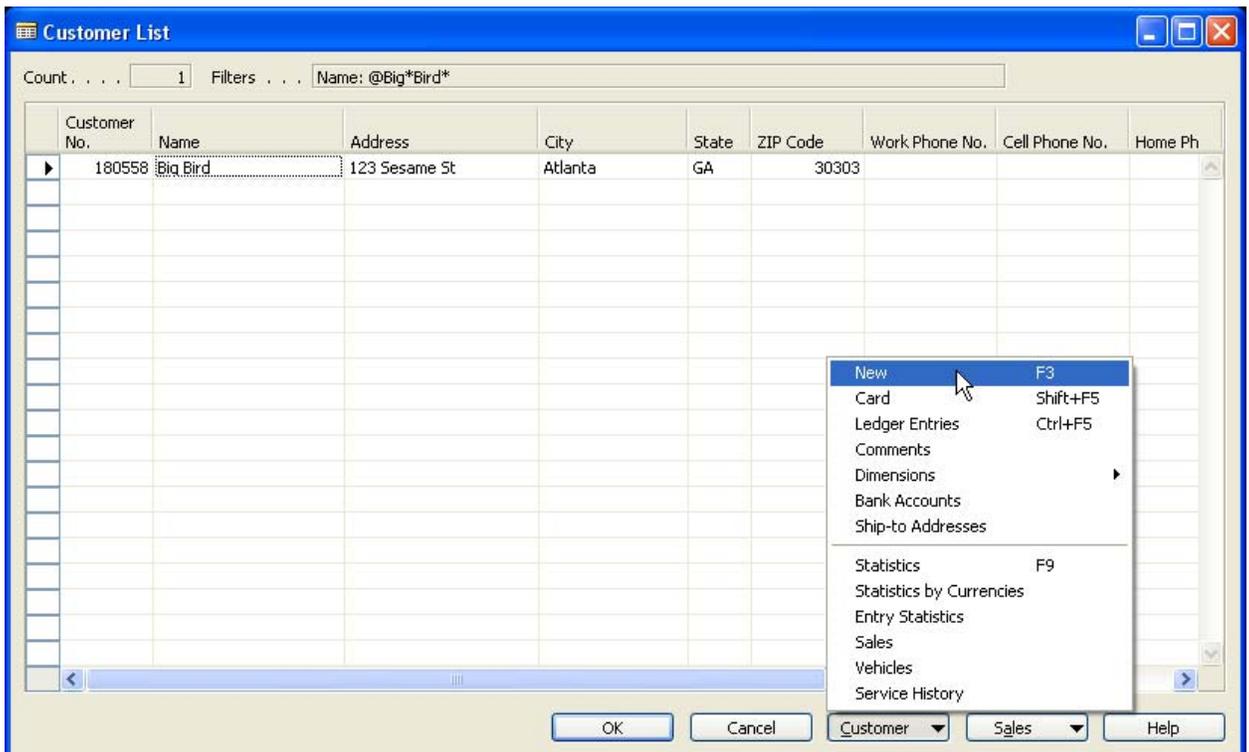
HELPFUL HINT: The customer may have been to the dealership for another department and could possibly already be in our database. We want to avoid any possible duplicate customer information.

Once you search for the customer by full or partial name, you will get one of two options listed below:

- If there is no name in the database that is similar to what you've entered, you will see this message (See Figure Below). Press the “Yes” button to continue to create your new customer



- If there is a name in the database that is similar to what you've entered, you will see this screen (See Figure Below). After confirming that none of the customers on this screen is the same person that you're trying to add, press the “Customer” button at the bottom of the screen and select ‘New’ to create a new customer



Finish filling out the customer's information on this screen. Use the Communication tab on the screen to input multiple phone numbers. Once you are finished entering all of the customer's information, press the "Enter" key on the keyboard and then press Esc. This will take you back to the previous screen where your new customer will be listed now. Search for your customer again, and now they should be in the database. Once you've selected them, press the "Enter" key on the keyboard and that customer will be on your Dealer Trade Screen.

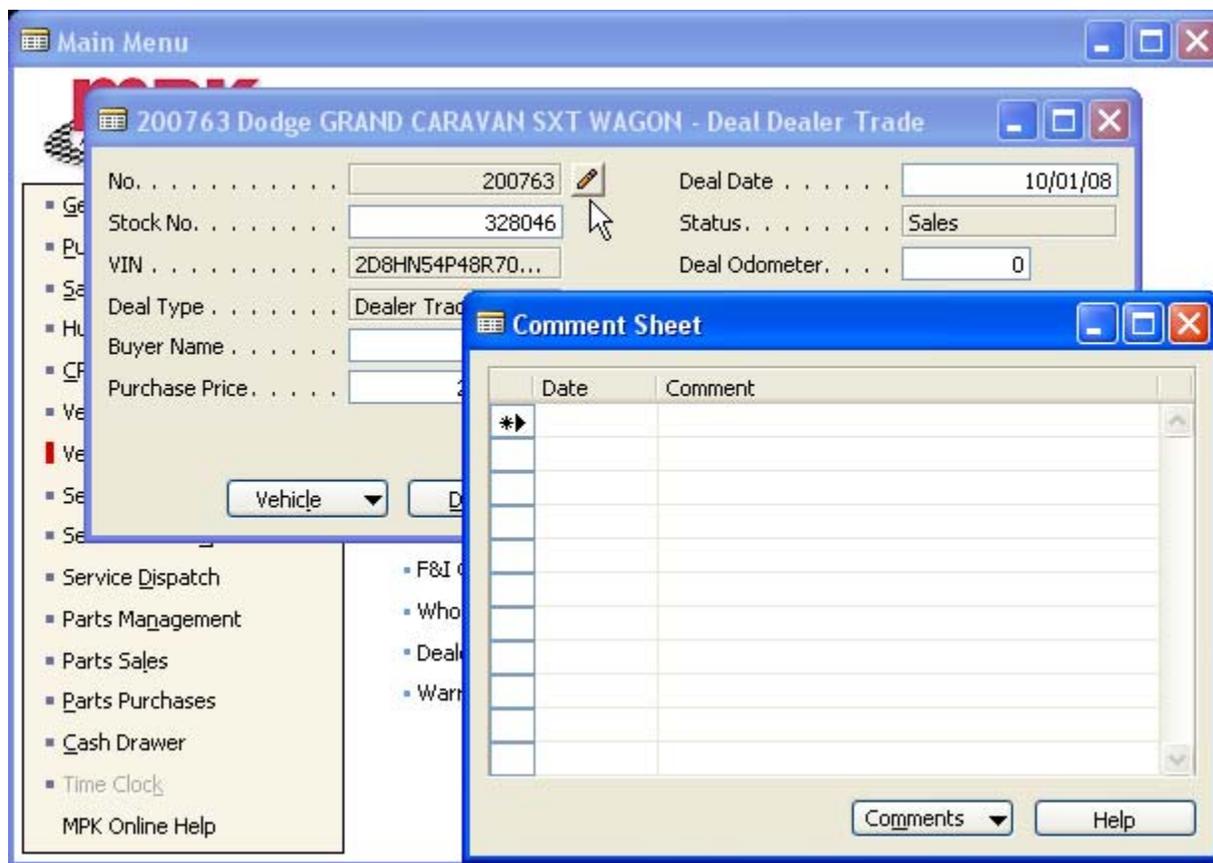
Filling Out the Dealer Trade Information

Now that we have our dealer trade number, vehicle, and customer selected we want to finish filling out the dealer trade screen with the correct information:

- Stock No. – The stock no. of the vehicle you will dealer trading.
- VIN – This information pulls from the stock no. entered in the dealer trade. The screen will only show a partial VIN. If you want to see the whole VIN simply roll over the VIN with your cursor and it will appear.
- Deal Type – The system automatically date and time stamps when this Dealer trade was created. If you want to change the deal date, simply type in the new date using either periods to separate month/day/year or backslashes (MM..DD..YY or MM/DD/YY)
- Buyer Name – Name of the dealer you are dealer trading with.
- Purchase Price – Price you are trading your vehicle for.
- Deal Date – Date you are making the trade
- Status – Lets you know what status your deal is in. The different statuses are Sales, Business, Delivered, Approved, Posted, Reversed, Imported, and Dead.
- Deal Odometer – The current mileage of the vehicle when it is being traded.
- Dealer License No – If there is a dealer license no for the customer you selected then it will appear here
- Dealer License State – If there is a dealer license state for the customer you selected it will appear here.

Also in the dealer trade screen, you will notice a  button at the end of the Deal No. field. This is an area where you can enter "internal" comments that will stay with this particular dealer trade so that when someone else recalls this deal they can see any special notes left for future reference. The system automatically dates the note each time information is entered. Simply click in the area next to the date and start typing the comments you want. Once you're finished, press Enter on the keyboard and then Esc to save the information. Once you get back to the Dealer Trade screen, you will notice that the  button is now changed to look like this . This lets you know that there is a comment and you can click on it to see what comments may exist for this dealer trade.

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Saving and “Closing the Deal”

Once you have entered all the information for the dealer trade you are ready to save and close the deal so that it can be sent to F&I or accounting. There are two ways to save a deal in the system depending upon dealer preference:

- The first is to verify all information in the deal is correct and press the ESC key to save the information for someone to recall later.
- The second way is to click on the functions button and change the deal status from sales to business. This function is checking to make sure all the appropriate information has been entered into the deal correctly. Now if you want to change the status again from business to delivered and from delivered to approved then you simply click on the functions button again and select the Deliver/Approve Option.

No.	200763	Deal Date	10/01/08
Stock No.	328046	Status	Sales
VIN	2D8HN54P48R70...	Deal Odometer.	0
Deal Type	Dealer Trade	Dealer License No.	12314
Buyer Name	Big Bird Auto	Dealer License State	GA
Purchase Price.	28,130.00		

Buttons: Vehicle, Deal, Functions, Print, Help

Functions Menu:

- Deliver / Approve Ctrl+F11
- Reopen Shift+Ctrl+F11
- Post F11



SHORTCUT: Another way to ‘Deliver/Approve’ without using the mouse is to press **Ctrl+F11**. Each time you press those two keys together the status will change. When you get to the complaint text box, once you’re finished typing / editing the complaint, press **Alt+S** to save the complaint.

Once you've finished entering all of your information for the dealer trade, press the "Print" button at the bottom of the screen and select 'F&I Forms' to print the associated paper work.

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Stock No.	328046	Status	Sales
VIN	2D8HM54P48R70...	Deal Odometer.	0
Deal Type	Dealer Trade	Dealer License No.	12314
Buyer Name	Big Bird Auto	Dealer License State	GA
Purchase Price	28,130.00		

Vehicle Deal Functions Print Help

F&I Forms
Wash Sheet

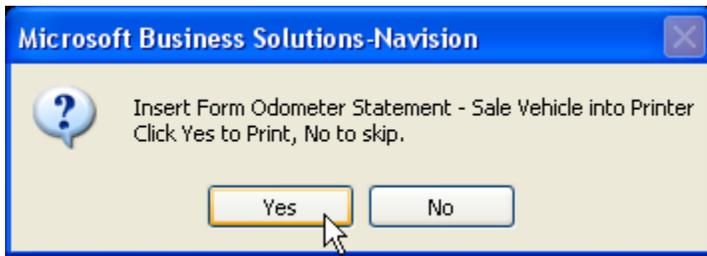
A list of forms will appear where you will select whichever form you want to print by clicking on that form line and an arrow will point at the selected form. Once you have selected a form, click the print option at the bottom of the window and select 'Print Selected Form.'

Contract Type	Form No.	Form Description	Form Version	Printed
Lease	1544	(Lease)Application For Texas Certificate ...	4/08	Yes
Both	1536	Odometer Statement - Sale Vehicle		Yes
Both	1537	Odometer Statement - Trade Vehicle(s)		Yes
Both	1538	Archer - Due Bill		Yes
Both	1539	Chrysler ATPI	1/06	Yes
Both	1541	TX - Power Of Attorney To Transfer Mot...	9/2005	Yes
Both	1542	TX - POA For Transfer Ownership To A M...	2/2006	Yes
Both	1543	Lessee's Affidavit Of Primarily Non Incom...	9-03/1	No
Both	1545	County Of Title Issuance	5/2006	No
Both	1546	App For Disabled Person Identification Pl...	6/2006	No

Print Help

Print Selected Form
Print All Forms

Once you click the 'Print Selected Form' option, a message will appear telling you to insert your form into the printer and click yes to begin printing.



HELPFUL HINT: Once you have printed a form there is a column in the forms list that will let you know that a particular form has been printed. The column will say either yes or no.