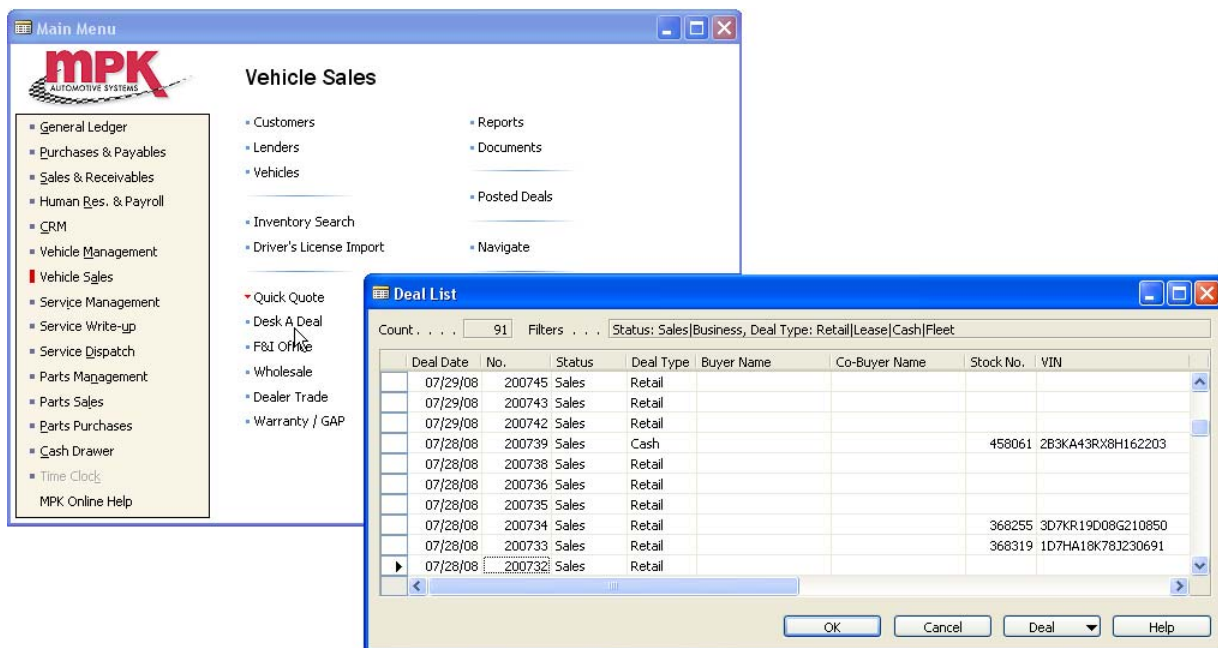


Section 2.1 – Desking a Deal

Desking a Deal

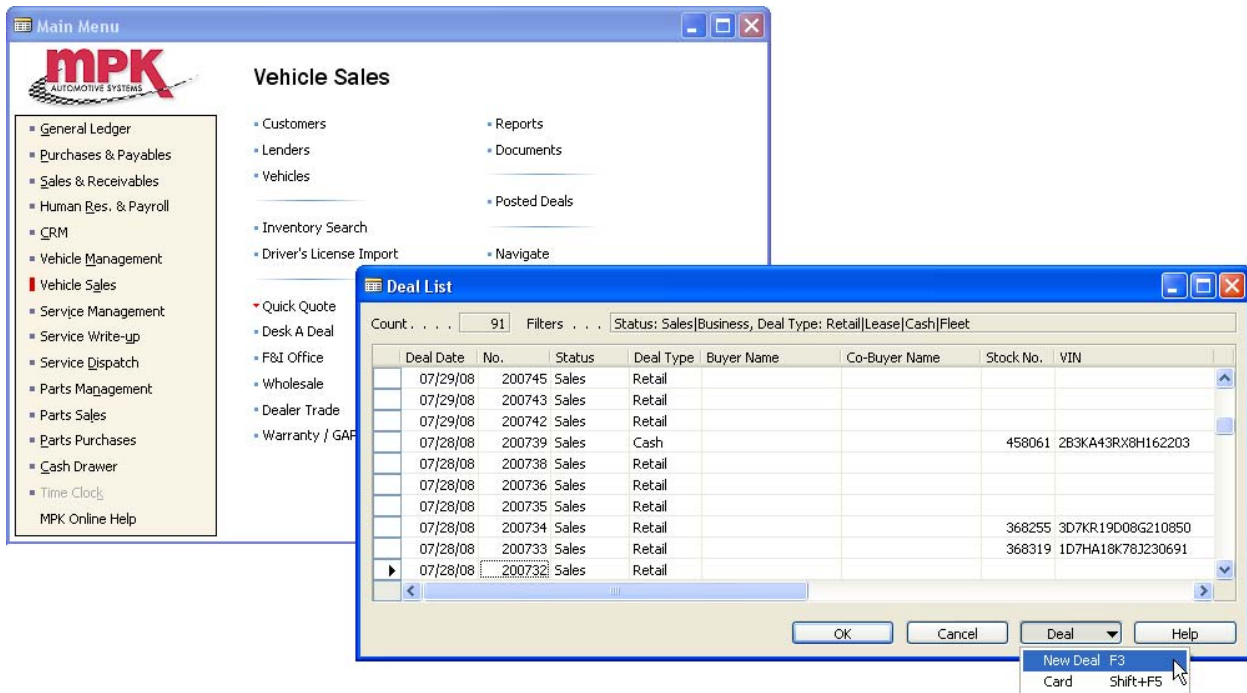
Begin by accessing the Desk a Deal screen.

- Log on MPK
- Select 'Vehicle Sales'
- Select 'Desk a Deal'

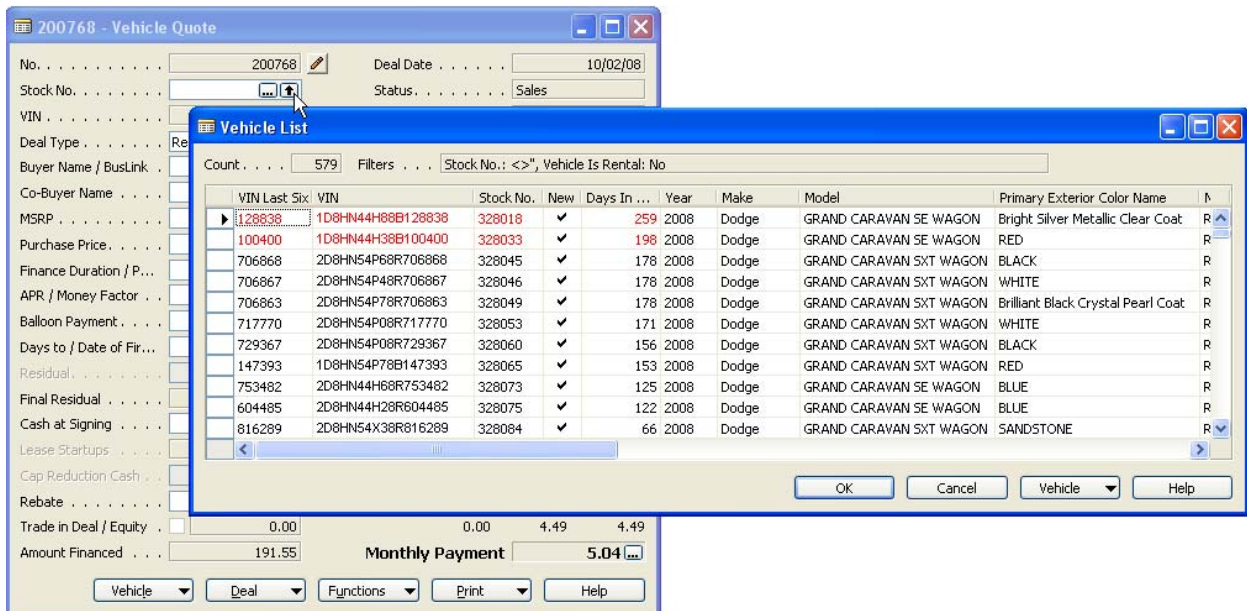


From there, your screen should bring up a list of previous deals. In order to create a new deal, make sure your cursor is in on the deal button at the bottom of the 'deal list' and press F3 as seen below in the example.

Section 2.1 – Desking a Deal




Once you have clicked on New Deal, the deal screen will appear with a deal #. The next item below is where you would insert the stock no. If you know the stock no. you can simply type it in the field otherwise, you can click on the up arrow and a vehicle list will appear where you can choose the stock no. you are looking for.



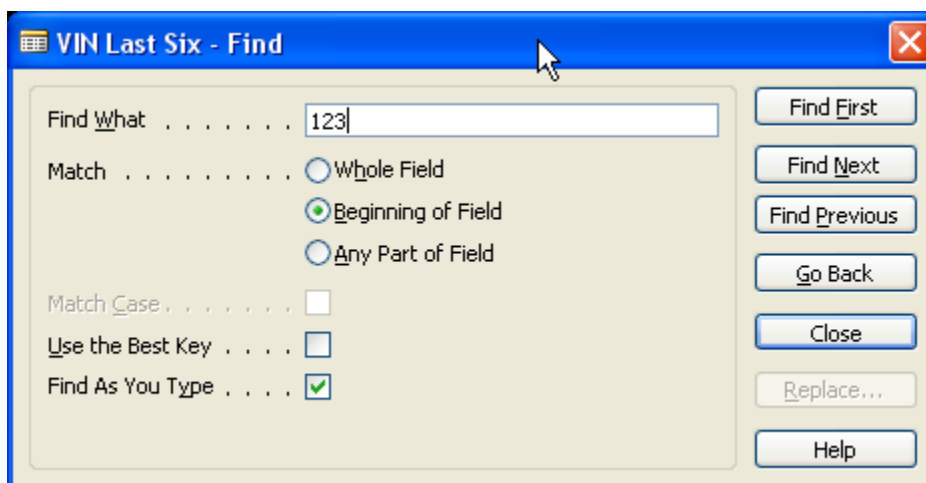
Searching for a Particular Stock Number

There are different ways to search for a stock number.

- In most cases of doing a deal, 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.
- 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.


Deal Type

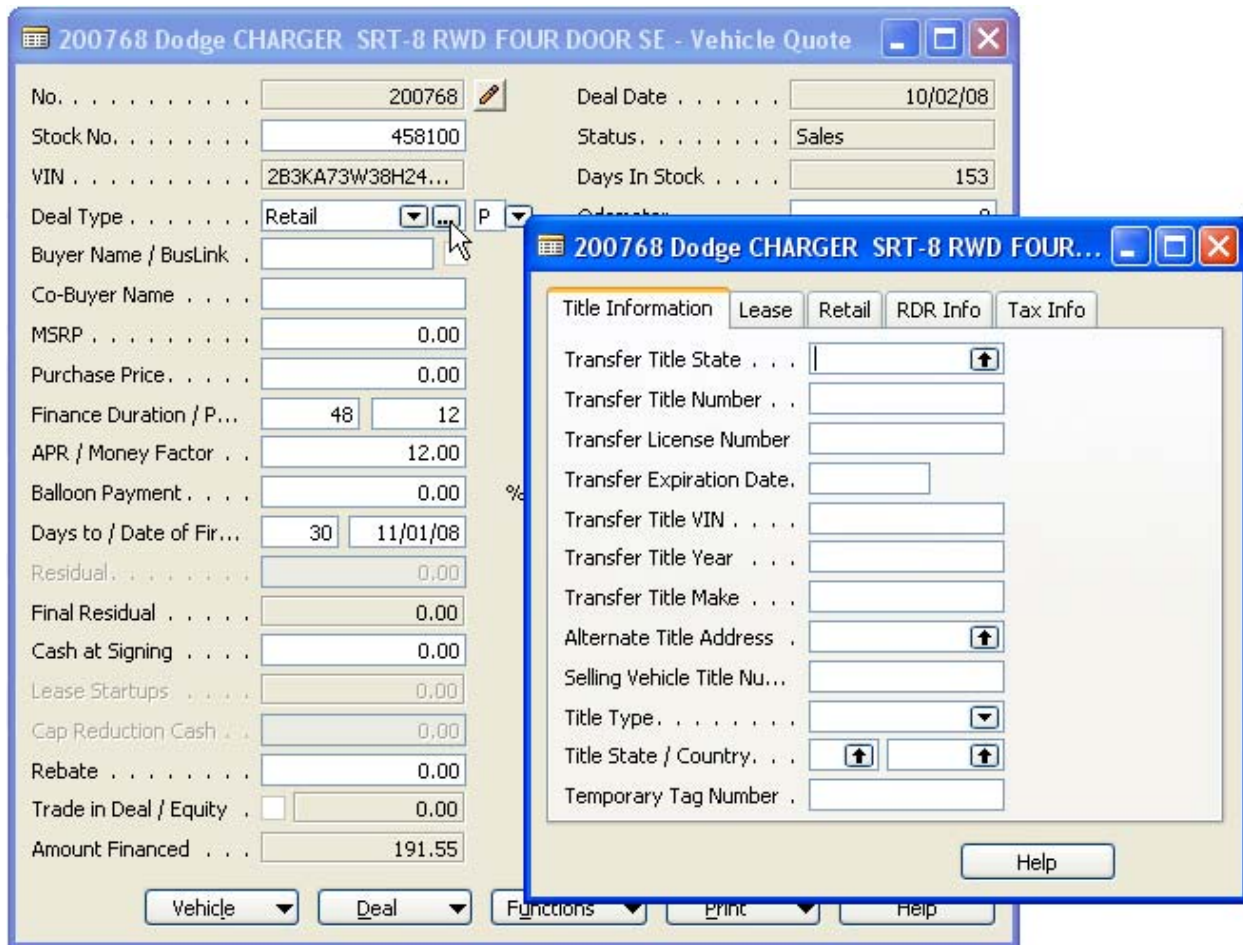
Once you have chosen a stock no. you must specify deal type. The deal type will determine what fields will become active or not. The different deal types are Retail, Lease, Cash, Wholesale, Dealer Trade, Insurance, and Fleet.



HELPFUL HINT: The deal type can be changed at anytime throughout the desking process by clicking on the 'Deal Type' field and using the drop-down to make a selection or another option is once you click on the 'Deal Type' field you can type 'L', 'C', 'W', 'D', 'I', or 'F' and the deal type will change automatically to the desired selection since that 'Deal Type' field becomes immediately active as shown above. The 'Deal Type' becomes highlighted indicating a selection is to be made by using the drop-down or by typing a shortcut key using the first letter of the deal type selection you prefer.

Supplemental Data

The  next to deal type is supplemental data that be used in deals when applicable. The ‘Title Information’ tab is used to capture transferring title information from the vehicle being traded. You fill out any and all fields necessary so that it will print on the relative paperwork when its time for the customer to “sign up.”



The 'Lease' tab **must** be filled out on any lease before the lease deal can be printed.

- Days to Second Payment - does not default from the initial screen. In the deal screen on a lease, days to first payment is set to 0 indicating that first payment is always collected up front.
- When you enter the 'Days to Second Payment,' whether is 30, 45, etc., the 'Date of Second Payment' will automatically calculate for you based on the 'Days to Second Payment' information.
- Single Pay Lease – This check box is designed to be used whenever the dealer is calculating a single pay lease for a buyer. When checked, the deal screen and contract will print correctly.
- Factory Employee Purchase – This check box is used to indicate to the seller that an employee is purchasing the vehicle. As long as this box is checked, it will mark all applicable forms at time of printing.
- BusinessLink – Used for Dodge customers that allows a special notification to dealer that this vehicle requires priority service
- Alternate Garaging Address –
- Help -

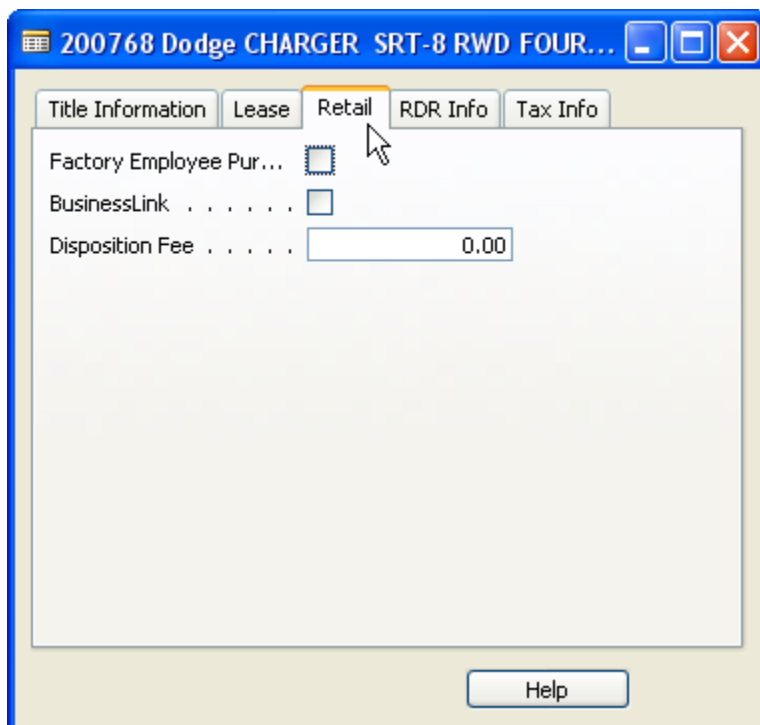
The screenshot shows a software window titled "200768 Dodge CHARGER SRT-8 RWD FOUR...". The window has several tabs: "Title Information", "Lease", "Retail", "RDR Info", and "Tax Info". The "Lease" tab is currently selected. Below the tabs, there are several input fields and checkboxes:

- "Days to Second Payment": A text box with a dropdown arrow on the right.
- "Date of Second Payment": A text box.
- "Single Pay Lease": A checkbox.
- "Factory Employee Pur...": A checkbox.
- "BusinessLink": A checkbox.
- "Alternate Garaging Ad...": A text box with an up arrow icon on the right.

At the bottom of the window, there is a "Help" button.

The Retail tab is used to fill out any extra dealer information for a purchase.

- Factory Employee Purchase – Used for dealer to show that employee is purchasing a vehicle
- BusinessLink – Used for Dodge customers that allows a special notification to dealer that this vehicle requires priority service
- Disposition Fee –



The screenshot shows a software window with the title bar "200768 Dodge CHARGER SRT-8 RWD FOUR...". The window has five tabs: "Title Information", "Lease", "Retail", "RDR Info", and "Tax Info". The "Retail" tab is selected. Inside the window, there are three rows of data:

- "Factory Employee Pur..." with a checkbox that is currently unchecked.
- "BusinessLink" with a checkbox that is currently unchecked.
- "Disposition Fee" with a text box containing the value "0.00".

A mouse cursor is pointing at the "Factory Employee Pur..." checkbox. At the bottom center of the window is a "Help" button.



HELPFUL HINT:

The RDR Tab is used whenever the dealer wants to RDR straight from the MPK system. Fill out all applicable information to be RDR to manufacturer.

- Sale Sub Type –
- Receiving Fleet –
- Selling Fleet –
- Buyer Salutation Code – Salutation for the Buyer for Retail Delivery reporting purposes.
- Primary Driver Salutation – Salutation for the Buyer for Retail Delivery reporting purposes.
- Primary Driver Contact – Primary Driver contact number
- Primary Driver Name -

200768 Dodge CHARGER SRT-8 RWD FOUR...

Title Information Lease Retail **RDR Info** Tax Info

Sale Sub Type. [] [↑]

Receiving Fleet [] [↑]

Selling Fleet. [] [↑]

Buyer Salutation Code... [] [↑]

Primary Driver Salut. ... [] [↑]

Primary Driver Contact... [] [↑]

Primary Driver Name. . . []

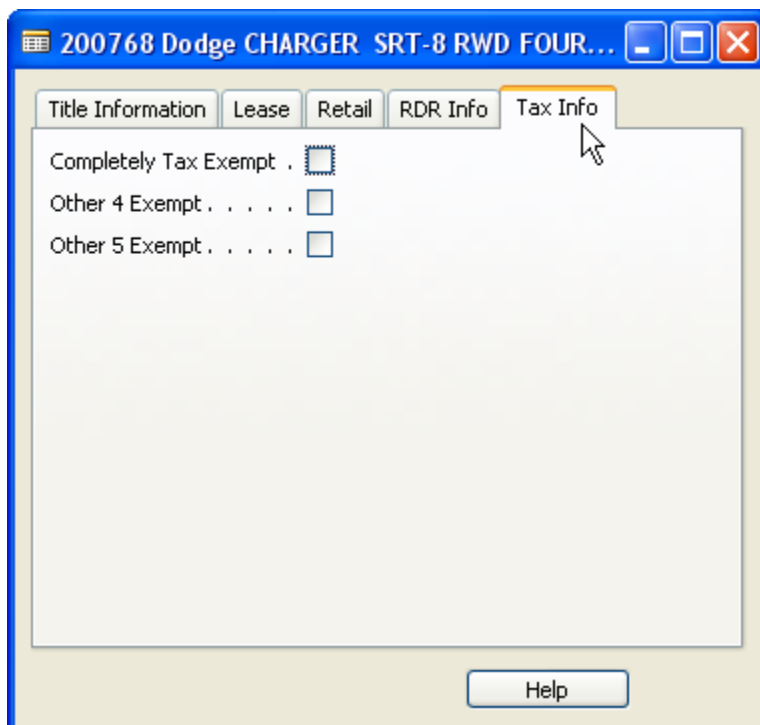
Help



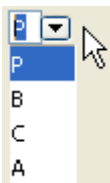
HELPFUL HINT:

The Tax Info tab is used to for any other special tax rules that may be applicable in a deal.

- Completely Tax Exempt – When checked, the buyer will not pay any taxes in the deal.
- Other 4 Exempt – When checked, the other 4 fee located in the fees section will be tax exempt. Depending upon dealer and state requirements the other 4 fee will be setup upon request.
- Other 5 Exempt - When checked, the other 5 fee located in the fees section will be tax exempt. Depending upon dealer and state requirements the other 4 fee will be setup upon request.



The next option allows you to select what type of purchase the buyer is making.



- 'P' – Personal

- 'B' – Business
- 'C' – Commercial
- 'A' - Agricultural

Buyer Name/BusLink and Co-buyer Name

There are different ways to search for a buyer or co-buyer:

- Buyer full name – In the Buyer Name field, type in the partial or full buyer'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/buyer in the database that the first name starts with "Ja" and the last name starts with "Do". Once you find the specific customer/buyer, 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.
- Buyer 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.

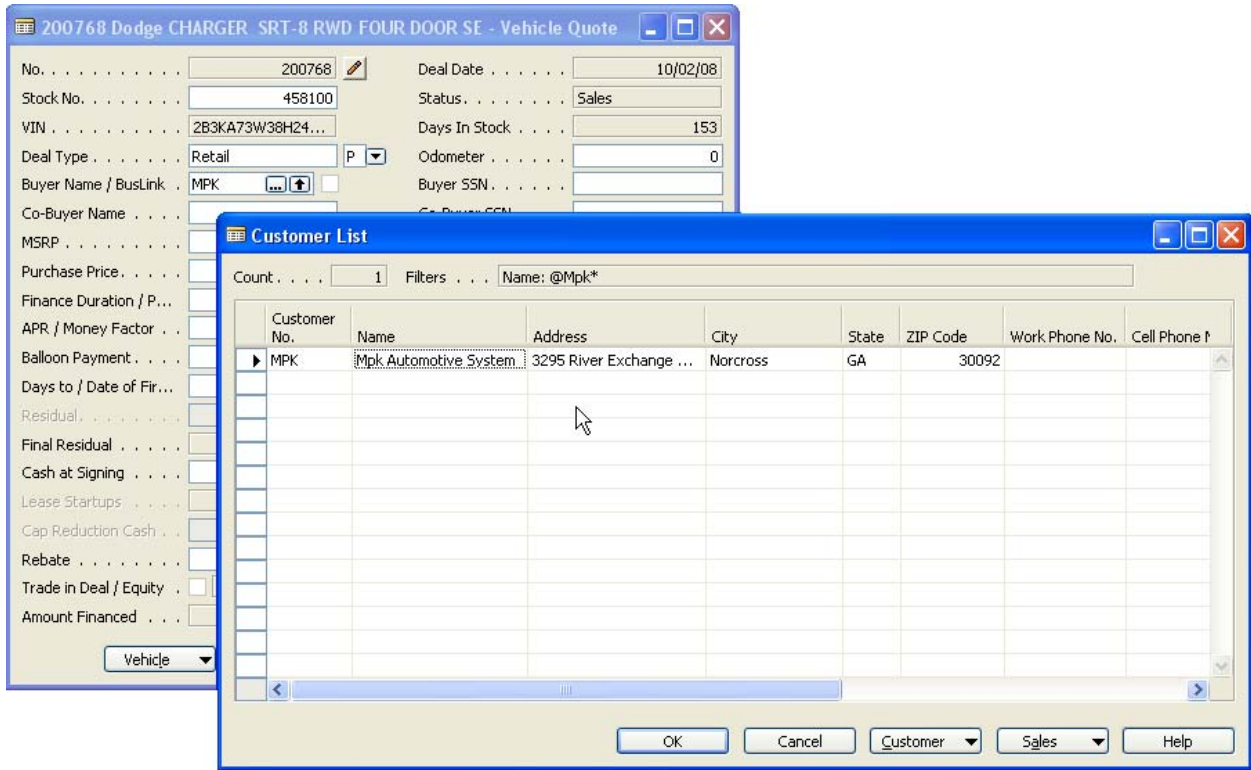
Adding a New Customer

If the customer is someone who has never been to the dealership before and you need to add them, you will still start off by searching for them.



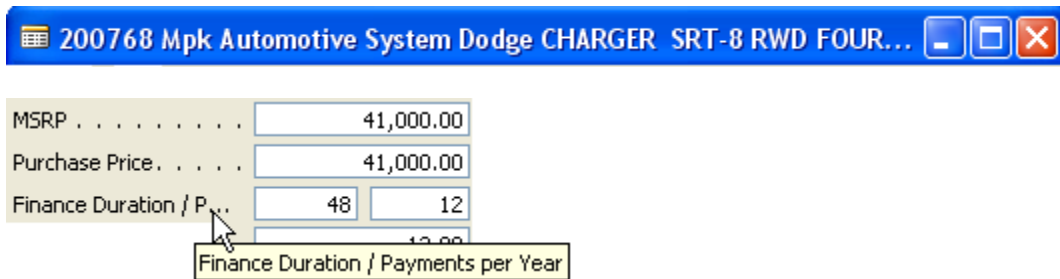
HELPFUL HINT: *The customer may have been to the dealership for another department and could possibly already be in our database. We want to avoid any possible duplication.*

There are two ways to search for customer/buyer names. You can click in the buyer name field and simply start typing the customer's first and last name and **PRESS ENTER**. So MPK was entered into the buyer name field and a customer list appeared with customers matching the name MPK. The other way would be to just enter the customer's first initial followed by last name. The reasoning behind this is there are going to be possible duplicate names in your database that we want to make sure you are checking for to choose the correct buyer.



MSRP , Purchase Price, and Finance Duration

Once you have entered buyer/co-buyer information, the MSRP will pull from the stock no. you have chosen from your deal. You will then enter a purchase price (selling price) of the vehicle you are selling. In the blue section above the deal no. it will tell you the customer name and the vehicle they are purchasing.



‘Finance Duration’ will be the term of the loan and ‘Payments Per Year’ will be how many payments will be made a yearly.



HELPFUL HINT: *The finance duration is defaulted based on dealer preference and can be changed at any time based on dealer needs. Payments Per Year are normally defaulted at 12 indicating the buyer will pay one payment a month but if your dealer is a “Buy Here Pay*

Here” lot then that field can be change to reflect weekly, bi-weekly, and semi-monthly payments when applicable.

Balloon Payment and Days/Date to First Payment

If your state used the balloon the payment, you must enter the amount of the balloon in that field and the system will calculate the percentage for you. The next two fields are days to first payment and date of first payment. When you change the days to first payment the date of the first payment will automatically change the days specified in days to first payment field.

Balloon Payment	<input type="text" value="10,000.00"/>	24%
Days to / Date of Fir...	<input type="text" value="30"/>	<input type="text" value="11/01/08"/>
Days to / Date of First Payment		

Residual and Final Residual (Lease Deals)

The Residual amount can be entered a multiple of ways. Each time you enter a rate you must tab or enter after your entry so that the deal can be updated accordingly. In this example, 50 was entered exactly and then tab/enter was pressed and the residual amount was calculated. You can also enter the residual amount as .50 or the total dollar amount you want the residual value to be (Ex. 21000). When you enter a value in the residual field the ‘Final Residual’ field will automatically calculate based on that Residual information.

Residual	<input type="text" value="20,500.00"/>	50%
Final Residual	<input type="text" value="20,500.00"/>	

Cash at Signing

Cash at Signing is money down from buyer(s) in the deal. You can type whatever amount in the ‘Cash at Signing’ field without having to use a decimal. An example would be entering 1000 in the field the system will know that you mean \$1000.00 and will make the applicable changes to accommodate. Now you can still the amount with the decimal if you choose but it is not required.

Cash at Signing

On a Lease deal, this field will work a little different. Cash at Signing now means whatever additional money is going to be collected up front with first payment.

- Cash at Signing – always includes the first payment. Based on dealer preference, we can have it include security deposit, acquisition fee, and sales taxes.
- Lease Startups – These startups can be defaulted based on dealer specifications.
- Cap Reduction Cash – This amount is figured after all applicable information has been entered.

Cash at Signing
Lease Startups
Cap Reduction Cash . .

First Payment	<input type="text" value="561.08"/>	
Security Deposit	<input type="text" value="0.00"/>	<input type="checkbox"/> No Depo...
Acquisition Fee	<input type="text" value="700.00"/>	<input type="checkbox"/> Upfront
Origination Fee	<input type="text" value="0.00"/>	
Lease Use Tax Rate	<input type="text" value="0.00"/>	
Monthly Personal Prop...	<input type="text" value="0.00"/>	
Initial Sales Tax or Cap...	<input type="text" value="0.00"/>	<input type="checkbox"/> Upfront
Fees Paid Upfront	<input type="text" value="0.00"/>	
End of Lease Fees		
Disposition Fee	<input type="text" value="425.00"/>	
Purchase Option Fee . . .	<input type="text" value="150.00"/>	

OK

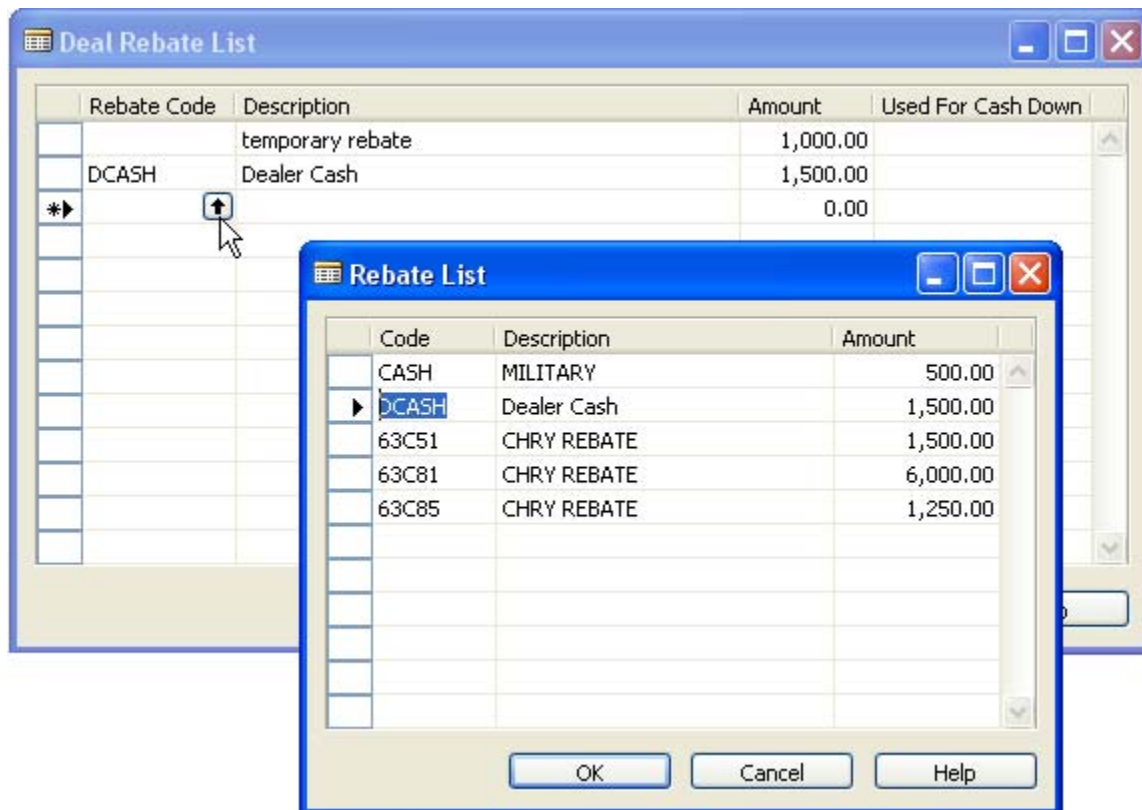
Rebates

There are two ways you can enter the rebate.

- You can simply type the rebate amount in the rebate field or if you have multiple rebates and want to break them down you click on the down arrow in the rebate field the deal rebate list box will appear. The initial rebate entered will be treated as a temporary rebate as shown below until you go in and change the description.

Rebate 


- Again you will have option to click on the up arrow and get a rebate list of commonly used rebates at your store. Once you have selected the desired rebate simply click the RED X box located in the right hand corner of the rebate list and deal rebate list to close and SAVE your choices or you can press the ESC key on your keyboard twice to exit and return to the main deal screen.



HELPFUL HINT: The rebate list can/will be customized per dealer request. The rebate amounts shown in the rebate list are not set in stone and can be changed at any time based on user preference and/or deal requirements. They are just there as a guideline of what amount is “normally” used when entering that particular rebate code.

Trade -Ins

The Trade in Deal/Equity field will show the **EQUITY** of the trade(s) in the deal and **NOT** the allowance. You must click on the down arrow in order to get the Deal Trade in screen window which allows you to enter the trade information. The 'Deal – Trade#' field shows the deal # and what trade you are looking at. You must tab, enter, or click into the VIN field in order for the 'Deal – Trade#' field to assign a trade number to the individual trade in. In this example we are looking at trade 1. Once in the screen, arrow down or click in the 'VIN' field and enter the trade VIN information. Once you enter the VIN information, the system will fill in the information on the right hand side (year, make, model) based on VIN decoding.

Trade in Deal / Equity . 0.00 

- VIN – Vehicle identification number for the trade in
- Odometer/Exempt – Odometer field used to enter mileage for the incoming traded vehicle. The 'Exempt' check box is used
- Color – Used for exterior color of the vehicle
- ACV/Appraiser – Actual Cash Value of the trade and 'Appraiser' is who actually appraised the vehicle. When you select the drop-down for 'Appraiser' you will get a list of every vehicle salesperson and sales managers in the system to choose from.
- Allowance – what you are allowing the customer

- Payoff – if there is a payoff for the trade in vehicle then it go here
- Equity – this number is calculated automatically based on the information entered into ACV and allowance
- Lien holder Name – If there is a lien holder for the trade in then you will select it from the drop-list provided. If the lien holder is not in the list then you must add them by clicking on the vendor button and selecting NEW or F3 once you are in the list.
- Account # - this is the account number for the trade in payoff
- Payoff Good Until – Date when payoff must be re-verified with lien holder

To enter a SECOND or THIRD trade, you must hit **F3** to get a new trade in screen. After you hit **F3**, click on the VIN field and you will see trade# 2 populate where you see the #1 at currently.

Next to ACV/Appraiser field is a drop box that allow the **APPRAISER** to be entered in the trade-in screen.

Code	Name	Salesper...	Front-En...	Back-En...	Phone No.
15	John Roser	Service	0.00	0.00	
20	Richard Mealey		0.00	0.00	
23	Ruth Casper		0.00	0.00	
26	Eric Ryan	Vehicle	0.00	0.00	
31	Denise Tucker		0.00	0.00	
41	Glenn Hojnacki	Parts	0.00	0.00	
42	Thomas Poulson	Vehicle	0.00	0.00	
44	Laura Rice	Vehicle	0.00	0.00	
46	Kirk Brown	Parts	0.00	0.00	
54	James Loftus	Vehicle	0.00	0.00	


The deal date automatically defaults to the current date of the deal. The deal status defaults to sales when you create a new deal. The deal status order goes as follow: Sales->Business->Delivered->Approved->Posted. The other deal statuses are **Reversed, Imported, and Dead**. 'Reversed' means that a posted deal got reversed. 'Imported' means that the deal came over from the previous DMS system and 'Dead' means someone deleted the deal from the active deal list. The statuses listed below cannot be changed from the status field. You must deliver/approve the deal in order for the status change.



HELPFUL HINT: No deal actually gets deleted from the system. It's placed in dead status in case it was done by accident and it can be copied later back to an active deal if necessary. **

Days In Stock and Odometer

Days in Stock pulls from the stock no. selected in the deal. You cannot change days in stock. Odometer also pulls from the stock no. but can be changed at any time. You can either type

the odometer mileage in for a retail deal or if this a lease deal, click on the  box next to the mileage and another box will appear that will allow you to fill out the mileage terms.

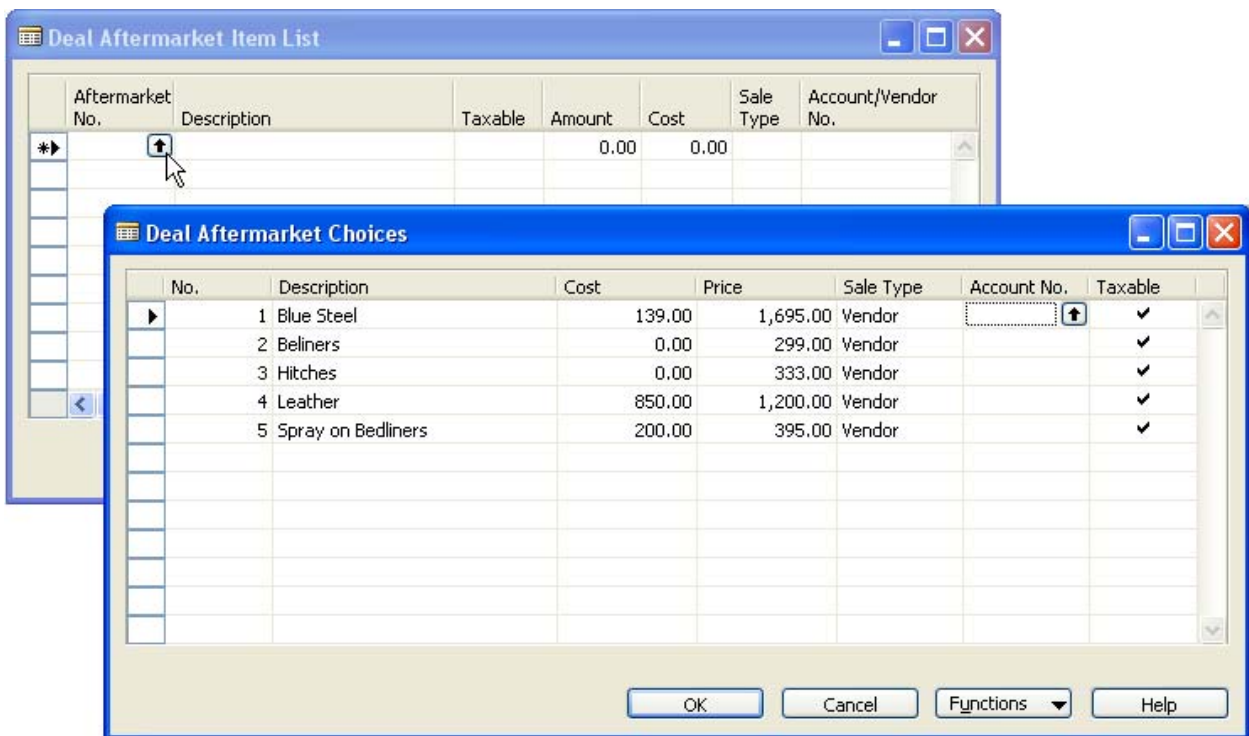
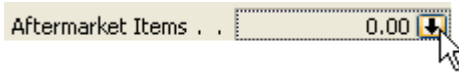
Buyer and Co-buyer SSN can be entered at anytime in the deal. Once a deal is posted the numbers will be hidden so that only people with access may be able to retrieve SSN for deals.

Sales People

The Sales People field allows the selection of two salespeople in deal. You must click on the box in the Sales People line and get the Salesperson/Closer/Desk Manager/F&I Manager box. Once you click on the box you have the option of either typing in the Salesperson/Closer/Desk Manager/F&I Manager you want or choose the drop down arrow and another box appears that allows you to choose from a list of Salesperson/Closer/Desk Manager/F&I Manager.

Aftermarket Items

The Aftermarket Items field is used to put any aftermarket adds or items that will increase the total sale of the vehicle into a deal. Click on the aftermarket items field and a drop down will appear. Click on the drop down again and you will have the option of choosing a preset aftermarket item your dealership has created. The Aftermarket Choices shown below are not set in stone and can be changed at anytime. If you don't have time to add them in the system going through Vehicle Sales/Setup/Deal Aftermarket Choices, then you can just click on a current aftermarket choice description field and simply type over it with whatever you need.



You will notice that there are some other fields shown in the Deal Aftermarket Item List and Deal Aftermarket Choices boxes. In the Deal Aftermarket Item List you have taxable, amount, cost, sale type, and account/vendor no. 'Taxable' means if this aftermarket item being sold is taxable then you click the box and a check mark will appear indicating to the system that this item needs to be taxed. The 'Amount' field is used for you to input the selling price of the aftermarket item. 'Cost' is the cost of the aftermarket item to you the dealer. 'Sale Type' and 'Account/Vendor no.' are used in accounting when posting the deal to reflect the "payable" that is created when the deal is posted and this will be setup by your individual accounting departments and MPK trainer. The only columns you as the sales manager or finance manager should be concerned with is taxable, amount, and cost.

Service Contracts

The Service Contract field shows the amount of what you are selling your service contract. In our system there are four types of service contracts that can be selected. They are service contract, maintenance agreement, extended warranty, and dealer warranty. Once you have selected which type of service contract you are selling, then you have to fill out the appropriate information below. A description of each field is listed below.

Service Contract . . . 0.00

Deal / Contract No. . . . 200768 1

Contract Type. . . . Service Contract

Vendor No. / Captive . . SC-CHRY

Warranty Provider Name. Chrysler Service Contracts

Warranty Months 48

Warranty Miles 48000 Add Miles to Curre...

Warranty Deductible. . . 100.00

Warranty Plan Code . . .

Warranty Plan Name. . . 5/5 Wrap Package

Plan Cost 500.00

Plan Premium 1,500.00

Plan Taxes 0.00

Plan Premium with Taxes. 1,500.00

Payment Method

Plan Amount Down . . . 0.00

Plan Amount Financed . . 1,500.00

- Deal/Contract No. – This field shows the deal number the service contract will be attached to and which service plan number it is whether it's the 1st, 2nd, 3rd...
- Contract Type – Type of agreement the dealer chooses to sale to customer. They are service contract, Maintenance agreement, extended warranty, and dealer warranty.
- Vendor No./Captive – The vendor number of the warranty provider you are choosing to use in the sale of the “service contract.”
- Warranty Provider Name – The Provider of the warranty being sold.
- Warranty Months – This will default from how the deal is currently structured so if the term is 60 months in the deal then the warranty months will reflect 60

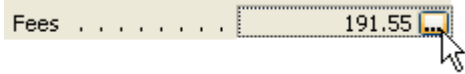
- Warranty Miles – Can be defaulted to dealership preference. After the warranty miles field there is a checkbox that says ‘Add Miles to Current Vehicle Miles.’ If you want the plan to start based on current mileage of vehicle being sold then check this box.
- Warranty Deductible – If there is a deductible with the plan being sold it goes here.
- Warranty Plan Code – If there is a code associated with the warranty being sold it will go here
- Warranty Plan Name – If there is a special plan name that is associated with the warranty being sold then it goes here.
- Plan Cost – How much the plan cost to the dealer
- Plan Premium – How much the dealer is selling the “service contract” for
- Plan Taxes – If the “service contract” is taxable then the taxable amount will be shown here
- Plan Premium with Taxes – Will reflect the service contract with taxes
- Payment Method – If the “service contract” will be financed outside of the deal then but still sold at the time of purchase with the vehicle, this option allows for that to take place.
- Plan Amount Down – How much will be put down for the outside financing of the “service contract.”
- Plan Amount Financed – Total amount financed after the ‘Plan Amount Down’ for the “service contract.”



HELPFUL HINT: If you want to sale multiple service contracts in the deal then you must press F3 in order to get a new service contract form to fill out. This works the same way as adding a second or third trade to the deal. F3 is always adding something new to the system. To get a list of all the service contracts being sold in the deal you can hit F5 in the service contract screen or click on the Contract button located at the bottom of the service contract form and click List.

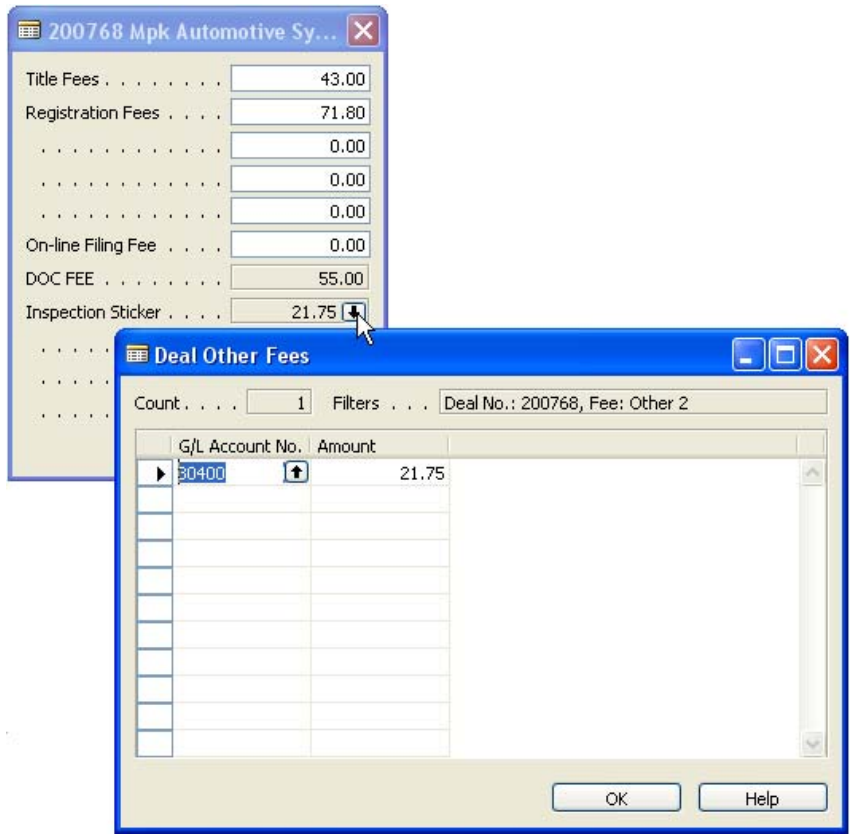
Fees

The Fees field controls all title, registration, and doc fees that are applicable in your state. All fees can be changed to specific amounts by clicking in the field you want to change and type over the amount.



Title Fees	43.00
Registration Fees	71.80
.	0.00
.	0.00
.	0.00
On-line Filing Fee	0.00
DOC FEE	55.00
Inspection Sticker	21.75
.	0.00
.	0.00
.	0.00
<input type="button" value="OK"/>	

The only fees you must do additional drill down into are the fees that are grayed out. To change the amount of one of those fees you can click on the amount and just change to desired amount.



To delete the fee altogether you **must hit F4** and click Yes to delete the other fee.



Sales Tax

This area shows how 'Sales Tax' will be calculated in a deal. The 'County/State' field shows the buyer's county and state that's being used the figure the tax rate below it. The 'Tax Rate/Use Buyer's County' field is how the tax rate is calculated especially if there are county taxes on top of state tax rates being applied to the deal. The last field shown below is the actual calculation of the Sales Tax based on the dealer state calculation method.

County / State	Gwinnett	GA
Tax Rate / Use Buy...	6.25	✓
Sales Tax	2,406.25	