Tutorial two: Setup

This tutorial will help you become familiar with the basics of setting up AutoQuote 2010 for *your* dealership in *your* state. You will enter the name of the dealership and some other basic information. More detailed information about the Setup section can be found on page 29 of the users' guide, which can be opened by clicking the "HELP" button in AutoQuote 2010.

The Information supplied below is only for the purpose of familiarizing you with the program. Actual information for your dealership and your state will most likely be different.

Setting up Dealer Info

1. Open AutoQuote by double-clicking on the "Autoquote2010" icon on the desktop.

2. Click on the "SETUP" button. The "Dealer Info" screen will open.

3. Click in the "Dealership Name" field, type in "Cars R Us", and press "Tab".

4. Type "1200 State st" in the "Address" field and press "Tab".

5. Type "Boise" in the "City" field and press "Tab".

6. Click the "State" dropdown list, choose "Idaho", and press "Tab".

7. Type "83702" in the "Zip" field.

8. Click in the "Life Ins Comm %" (Life Insurance Commission Percentage), type 5, and press "Tab".

9. Click on the "Mech. Prot Taxable (Y/N)" (Mechanical Protection Taxable), click the dropdown menu, choose "Y", then press "Tab".

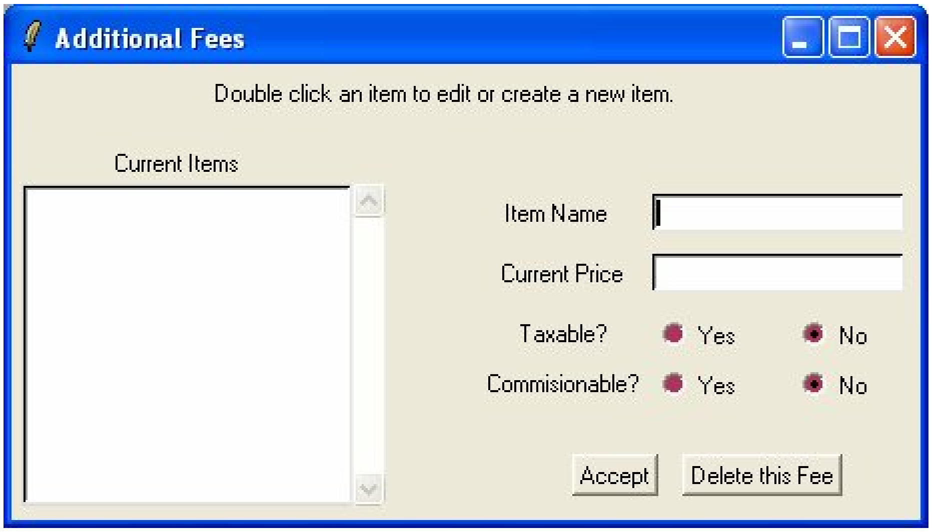
10. Click on the "Doc Fee Taxable (Y/N)" field; click the drop down menu, choose "Y", then press "Tab".

11. Click on the "New Pack" field, type in 500, then press "Tab".

12 Type in 500 in the "Used Pack" field and press "Tab".

13. Click on "Def. Sales Tax%" (default sales tax), type in "6" or enter the tax amount in your state, and press "Tab".

14. Click on the button labeled “Click Here”, to the right of “Add/Edit Extra Fees”, the following screen will appear:



15. In the “Item Name” field, type “GAP INSURANCE”, and press “Tab”.

16. In the “Current Price” field, type “995”, and press “Tab”.

17. Click the “Yes” button next to “Taxable?”.

18. Click the “Yes” button next to “Commissionable?”.

19. Click “Accept”. The “Current Items” field will show “GAP INSURANCE”.

20. Click the red “X” in the upper right hand corner of the window to close it.

21. Click “SAVE DEALER INFO”.

Note: The next time you open the program, the Payment screen in the Finance section will show the field “GAP INSURANCE”. For more Information on the Finance section, see “Tutorial three: Finance”.

Setting up Finance Sources

1. Click “Finance Sources”.

2. Click “Add Bank”. The “Bank Data” screen will open.

3. In the “Name” field, type “Wachovia Dealer Services”, then press “Tab”.

4. In the “Address” field, type “PO Box 19733”, then press “Tab”.

5. In the “City” field, type “Irvine”, then press “Tab”.

6. Select “CALIFORNIA” from the “State” dropdown list then press “Tab”.

7. Type “93602” for the Zip then press “Tab”.

8. Type “123456” for the lienholder number then press “Tab”.

   NOTE: When entering actual bank information, if there is no lienholder number, you can use the telephone number or just leave it blank.

9. Click “ACCEPT”.

10. Click on the “Change Bank” button. A list of current banks will be displayed.

11. Click on the “Wachovia Dealer Services” listing then click “MODIFY ITEM”. The bank information will appear under the “Bank Data Info” section.

12. Click in the “Address” Field and type “PO BOX 19777”.

13. Click “ACCEPT”. You will now notice the address has been changed.

14. Click “CLOSE”.

Setting up Frequent Buyers

1. Click “Frequent Buyers”.

2. Click “Add Buyer”.

   Note: The “Frequent Buyer” screen assumes the buyer is a person. In this case, you will enter the information for an organization.

3. Click on the “Last Name” field, type in “Idaho Auto Auction”, and press “Tab”.

4. For the Address, type in “7355 So. Eisenman rd”, and press “Tab”.

5. For the City, type in “Boise”, for the County, type in “Ada”, and press “Tab”.

6. Click on the “State” dropdown menu, choose “IDAHO”, and press “Tab”.

7. In the “Zip” field, enter “83716”, and press “Tab”.

8. Enter “208-555-7345” in the “Work Phone” field and press “Tab”.

9. Click “ACCEPT”.

10. Click “CLOSE”.

Setting up Salesmen

1. Click “Salesman”.

2. Click “Add Salesman”.

3. Click on the “First Name” field, type in “John”, and press “Tab”.

4. Click on the “Last Name” field, type in “Smith”, and press “Tab”.

5. Type in any information that may be relevant in the “Additional Information” field, and press “Tab”.

6. Click “ACCEPT”.

7. Click “CLOSE”.

Setting up Sales Categories

1. Click “Sales Categories”.

2. Click “Add Category”.

3. Click on the “Category” field, type in “Retail”, and press “Tab”.

4. Click “ACCEPT”. “Retail” will appear in the “Category” list.

5. Click on the “Category” field again, type in “Consigned”, and press “Tab”.

6. Click “ACCEPT”. “Consigned” will appear in the “Category” list.

7. Click on the “Category” field one more time, type in “Wholesale”, and press “Tab”.

8. Click “ACCEPT”. “Wholesale” will appear in the “Category” list.

9. Click “CLOSE”.

10. Close AutoQuote 2010.

Note: The categories “Retail”, “Wholesale”, and “Consigned” are the most common sales categories. You will see how these are used in “Tutorial 3: Finance”.

This concludes Tutorial two: Setup.