

Quick Start for the CarouselCars System

Version 2.010 – September 2010

I can provide a 1" thick documentation binder for the programs in this system. However, I recognize that nobody is ever gonna read it, or if they do, nobody will ever remember it.

So in this little tome, I want to give a really high level overview of how to use the system. For detail, refer to the appropriate program's documentation, or better yet, call one of us at Carousel Software.

There are six major programs currently supplied as part of our system.

- The **Inventory** program, which lets you enter new cars into the system, and also lets you enter car reconditioning costs.
- The **Inventory Display** program, which lets you view your inventory in different ways (eg, cars can be sorted by stock number, make, year, etc).
- The **Deal** program, which lets you enter customer information, and deal details into the system, and which will calculate payments, profit, and commissions. It also will print out various forms needed for the transaction.
- The **QuickQuote** program, which lets you quickly enter a minimum amount of data so that you can calculate the above Deal numbers, without having to enter as much information as the Deal program needs.
- The **Self Financing** program, which tracks your buy here, pay here loans, flags any loans which are past due, generates a nastygram, and eventually will export data to quickbooks.
- The **Admin** Program, which helps maintain the system, and prints off various reports.

Each of these programs are separately documented, both in hard copy and in PDF (online) format. There are also a bunch of lesser used programs that are included with the system. They will not be described in this short document, but are described in the complete documentation included with a system.



The Inventory Program

Most cars get entered into the database inventory using the Inventory Program. The exception are trade in cars, which roll over directly from the Deal program. However, the Inventory program can be used to add data to those cars too.

When the program comes up, enter an existing or new stock number. If you enter an existing stock number, you will see the characteristics of the car. If you entered a new stock number, everything is blank, and you will have to enter it.

There are four tabs on the top of the screen, three of which are significant. There are also two buttons at the top of the screen: Reset, which wipes out everything you have done on this car, and Save Data, which you must click to preserve the data that you are entering for this car, after all the data is entered.

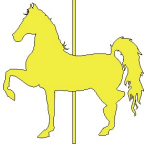
The first tab is the Car Description. This contains, as you might think, the make, model, color, vin, year of car, and other stuff. At the bottom of this screen is a button, that says “Next Tab”. Click on it and you will be on the 2nd tab.

This tab allows you to enter initial car costs, dealer suggested price, and reconditioning costs. Reconditioning costs are entered by pressing the middle button “Add new Reconditioning Item”. This makes visible a table on the right of the screen that either allows you to enter a new reconditioning item, or to view or edit an existing one. This table requires a description, a vendor, and an amount. The vendor must already exist in the vendor table. You can add new vendors either using the “add vendor” button, or from the main screen. You can add as many reconditioning items as you want. The sum total of all reconditioning costs will be shown on the left of the screen, in the gray field labeled, strangely enough, “reconditioning”.

The next tab takes you to the “Purchased From” field. Enter the company name, or the first and last names of an individual from whom you bought this car. Also required are address, city, state and zip. The rest is optional.

Finally, after all this is in, you can click on the Save Data button and write all this to the database. Until Update is clicked, nothing (except reconditioning) got written. So if the program blows up, or you lose power or something during the entry for a car, all your data falls into the bit bucket.

When this is all done, you can then enter the data for the next car on your list.



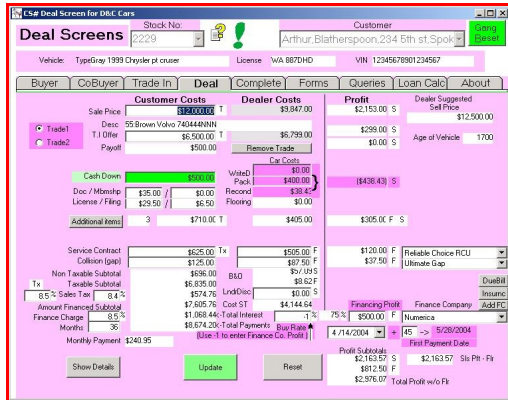
The Inventory Display Program

This screen lets you search the entire database of vehicles, and find all cars that match selected criterion. You can search on any or all of the following, depending if the appropriate check box is checked:

StockID	Year	Make	Model	Color	VIN	Buy Date	Sell Date	Invr	Div	SP
1117	1999	Ford	F350	NA	2F1P911P2D094392	4/1/2001	Not Sold	Invr		\$5,000.00
1126A	1999	Chrysler	sebring	Pink	232488453	6/5/2001	Not Sold	Invr		\$0.00
1124	1999	HW	tail	Red	234214020C	6/3/2001	Not Sold	Invr		\$25,000.00
1229	1999	Chrysler	pc cruiser	Gray	1234678901234567	4/1/2001	2/5/2002	Invr		\$12,500.00
1510K	1977	Cadillac	El Dorado	Black	28305020023	8/23/2001	11/1/1980	Invr		\$0.00
1551	1976	Dodge	ram	Green	2230292D7	4/1/2001	8/7/2002	Invr		\$4,000.00
1553	1981	Buick	skylark	Brown	2138277080	4/1/2001	Not Sold	Invr		\$3,000.00
1575	1999	Dodge	durango	White	818718309280290	9/6/2001	10/1/2003	Invr		\$15,000.00
1618	1997	Oldsmobile	88	Red	24294292K	6/1/2001	Not Sold	Invr		\$15,500.00
1658A	1976	Ford	f150	Red	24254222C	6/23/2002	Not Sold	Invr		\$0.00
1664A	1998	Daimler	bioper	White	234213K3LK	8/1/2002	Not Sold	Invr		\$0.00
1665A	1999	Chevrolet	corvette	Silver	2342302D2P233	8/1/2002	Not Sold	Invr		\$0.00
1667	2000	Dodge	durango	White	2399020301332	9/15/2001	Not Sold	Invr		\$0.00
1668B	2001	Dodge	durango	White	98798137132202K	9/15/2001	Not Sold	Invr		\$0.00
1669	1998	Oldsmobile	98	Blue	949483P29787	9/1/2001	Not Sold	Invr		\$0.00
1670A	1999	Infiniti	omega	Black	2492394723	4/15/2003	Not Sold	Invr		\$0.00
1680	1999	Dodge	durango	White	8D1P911P2D094802915/2001	9/26/2002	Invr			\$0.00
1681A	1999	Plymouth	cuda	White	232605	1/28/2003	1/19/2004	Invr		\$0.00
1682A	1999	Volvo	v20	Brown	2349287113P2891K3	2/12/2003	Not Sold	Invr		\$0.00
1683A	1995	Buick	century	Maroon	28494028023F	11/1/2003	Not Sold	Invr		\$0.00
1684	1999	Dodge	durango	Gray	1P83D11P2C3094823	9/7/2001	Not Sold	Invr		\$15,000.00

- VIN – any consecutive set of characters, at any part in the VIN
- Year – must be a four digit number
- Make – must select from the dropdown list
- Model – must select from the dropdown list
- Color – must select from the dropdown list
- Buy Date (Before) – find a car that was bought on or Before the selected date.
- Buy Date (After) – find a car that was bought on or After the selected date

- Sell Date (Before) – find a car that was sold on or Before the selected date.
- Sell Date (After) – find a car that was sold on or After the selected date
- Sold – can be either Sold, In Stock, or Complete (deal made but no check yet).
- Title – can select either Have or Have Not title (from checkbox)



The Deal Program

Whereas the Inventory program essentially lets you buy a car, the Deal program helps you to sell the car. Step one is to select a car from the Stock number dropdown box. You cannot add a car at this point, you must only deal with cars that have already been entered into the system.

When you have selected a car, then you need to either Add a new customer, or Select an existing customer for this car. We allow any single car to have negotiations going on by several different customers, until somebody finally writes a check and we sell the car to that guy. So Selecting a customer means that you are selecting a customer who has already expressed an interest in this car. Adding a new customer allows you to in fact add a brand new person to the database, or to indicate that somebody already in our database is interested in this particular car.

So, if you select Add New Customer, you will end up at the Customer Find screen. Enter the first couple of letters of the customer's last name (or his business name, if it is a business), and the screen will show you if we already have anybody by that name in our database. If we do, click on that name. If not, then click on the "New Name" button.

This pops us to the first Tab, the Buyer Tab. Here you will fill out information on this new customer, at least his address, city, and zip. Everything else is optional, but helpful, including driver's license and spouse information. When you are done, click Update. Note that a buyer could be a business, in which case you would click the "Company Record" checkbox. If the buyer is another auto dealer, that is, you are wholesaling the car, then click the Wholesale radio button. And if, in Washington, you are selling the car at auction, then click off the B&O Tax checkbox.

If there is a CoBuyer, then click on the second tab, and you will fill out similar information for that person.

The main event is the Deal Tab. This screen shows all the information you need to complete a deal. It is actually arranged in a grid, even though it may not look like it. The data is arranged in five columns, of about 10 or so rows. The first column is simply a label for the row. The second column is the customer's offered prices. The third column is the dealer's actual cost for each item. The fourth column is the profit that the dealer will make on each item. And the fifth column contains other information, like suggested retail price, or warranty company. The bottom center of the screen shows the actual profit for the dealer, broken down to Sales and Finance profits.

So the first thing you need to do is to enter what the customer is offering for the car, in the “Sale Price” field.

If the customer has a trade in, click the Trade In button, and enter the characteristics of that trade in (make, model, year, etc). You can also enter any Payoff information that may exist, along with the Actual Cash Value that you think this vehicle is worth. Then you must enter what you will offer the customer for his car, which is not necessarily the ACV value.

Following the trade in areas, you can enter the licensing costs, and enter data for warranties and other like instruments that you may be selling. This might be done by the F&I guy if you have one. The sales tax is computed, and the amount that needs to be financed (which is the offered price less the trade ins less the cash down) is shown. By entering an interest rate (as a percentage, eg 12%) in the “Finance Charge” field, and the number of months that the loan will run for in the “months” field, we will calculate the total interest to be paid during the life of the loan, and the monthly payment required. Click on the “Update” button to write this data to the database.

Note that this data can be modified over and over again, as many times as you want. I will recalculate the final numbers after every field is changed. You cannot get out of this screen without clicking on Update or Reset.

When the deal is finalized, then you can go to the Forms Tab. This screen will present a list of forms that your dealership might need. These include purchase order forms; government forms, like for odometer readings and titles; bank loan and warrantee application forms; and a bunch of miscellaneous other forms that seem to be needed. You need only put the preprinted form in your printer, select the form to be printed, and click on the “Print Form” button, and my program will fill in the blanks.

Finally, you need to go to the “Complete” tab. Here the salesman commissions will be added, the official date of the sale, the final odometer reading, any trade ins will be assigned an inventory stock number, and by clicking on the “Sell the Car” button, everything will be completed and the trade ins will be rolled into the inventory. This is a big deal, and a difficult one to back off from later, so you should be pretty sure that you have a done deal before you click this button. We recommend that you wait till you have all the checks in hand before doing this.

Note that there is a variation of the Deal Program, named the Salesman Deal Program, that does all of the above, except that in the Deal Tab only the customer data is visible (and not the dealer costs or profit), and in the Completion screen the commission and profit data is not visible, nor is the Sell the Car button. Some dealerships believe that their salesmen should not be generally aware of this information.



The QuickQuote Program

Customer Costs	Dealer Costs	Profit	Dealer Suggested Sell Price
Price: \$12,500.00	\$9,847.00	\$2,153.00 S	\$12,500.00
Trade In #1: 99 Brown Volvo 7454440NHY Offer: \$5,500.00 Payoff: \$900.25	\$6,789.00 Remove Trade #1	\$239.00 S	Line 3 \$5,495.25
Trade In #2: Offer: \$0.00 Payoff: \$0.00	\$0.00 Remove Trade #2	\$0.00 S	Loan Calculator
Cash-Down: \$500.00			
Doc / Mbrship License & Fltip: \$35.00 / \$19.00	Pack Recor: \$100.00 Flooring: \$0.00	\$430.00 S	
Service Contract: \$500.00 Collision (opt): \$125.00	\$500.00 \$97.50	\$145.00 F \$37.50 F	
Non Taxable Subtotal: \$685.76	B&O: \$94.54 S		
Taxable Subtotal: \$5,500.00	Land/DHS: \$75.00 F		
Sales Tax Subtotal: 8.5 %	Cost ST: \$4,221.52		
Amount Financed Subtotal: \$7,636.36	Di Ph from Bank: \$400.00 F		
Finance Charge: 3.6 %	Total Interest: \$1,204.14		
Months: 36	Total Payments: \$48,691.12		
Monthly Payment: \$241.42			
		\$2,989.57 S	\$732.50 F
		\$2,821.07	

We were asked to provide a one screen version of the Deal program, for doing quick and dirty calculations on a car deal. This version of the program does not take down detailed customer information, or even detailed tradein information (except offered price and ACV), and does not print forms or actually sell the car. But all the significant data on the Deal Tab of the Deal Screen can be entered here, and all the significant calculations, including finance charges, are done and displayed.

Furthermore, it also allows you to back calculate a price, or a number of months of a loan, starting from a monthly payment or a total price of the vehicle.

There is a simple loan calculator included (in the purple) also.

When you click the Update button, this data is written to the database, under the name “QuickQuote-timestamp” where timestamp is the timestamp of when this was done.

If a deal is going to be made, you can then go to the full Deal program, bring up that car, select the “quickquote” customer, fill in his name and address information, fill in his full trade in information, but will not have to fill in the Deal information because it will be remembered. Then you can proceed as usual to print the forms and sell the car.



The Self Finance program

The self finance program is used by those dealers that want to provide buy here - pay here service.

Loan Maintenance Declining Balance

Loan Maintenance Screen

Ingmar Bergman
E1503 Hartford St 609 3238874
seattle WA 98133

1999 Red Audi quattro
20848823490

6877

Loan Amount: \$5,272.85 Sched Total Interest: \$124.89 Date of Sale: 12/15/2003
 Loan Rate: 8.000% Sched Total Payments: \$5,398.94 1st Payment due: 1/13/2004
 Months: 6 Pay Off as of Today: \$4,902.95 Monthly Payment: \$899.43 Close Account

DATE	date	Payment	principle	diy int	accua int	tot int	balance	acua princ
S	12/15/2003		\$0.00				\$5,272.85	\$0.00
P	1/13/2004	\$899.49	\$865.97	\$1.16	\$33.62	\$33.62	\$4,406.99	\$865.97
P	2/13/2004	\$899.49	\$869.45	\$0.97	\$30.04	\$63.66	\$3,537.53	\$1,735.32
P	3/13/2004	\$899.49	\$876.94	\$0.78	\$22.55	\$86.21	\$2,660.59	\$2,612.26
P	4/13/2004	\$899.49	\$881.25	\$0.59	\$18.14	\$104.25	\$1,779.24	\$3,493.61
P	5/13/2004	\$899.49	\$887.75	\$0.39	\$11.74	\$116.09	\$891.49	\$4,381.36
P	6/13/2004	\$899.49	\$893.41	\$0.20	\$6.08	\$122.17	(\$1.92)	\$5,274.77
S	12/15/2003						\$5,272.85	
P	1/13/2004	\$500.00	\$466.26	\$1.16	\$33.64	\$33.64	\$4,806.49	\$466.26
P	1/22/2004	\$400.00	\$390.83	\$1.06	\$9.47	\$43.11	\$4,415.96	\$856.89
P	5/13/2005	\$0.00	\$0.00	\$1.07	\$486.59	\$529.70	\$4,902.55	\$856.89

Next Due Date: 12/30/2003

Enter Payment: 5/13/2005

Buttons: Close Screen, Print Screen, Print Coupons, Print Receipt

The goals of the program are to:

- 1) generate a payment schedule
- 2) print payment coupons for the client
- 3) keep track of payments
- 4) allow for entry of late payment fees
- 5) warn you when a client is getting late with his payments
- 6) generate a letter to the client when they are late
- 7) let you know exactly what kind of a balloon payment would be needed if the client wants to pay off early.

There is a screen to initiate a loan that the Deal program has set up, a screen (above) to track a loan, and a series of reports that can be generated. Payment information is rolled over to Quickbooks.

The screen above shows the schedule of payments in the top area, and the actual payments below that (in the white backgrounds). At all times you can see what the payoff would be, and if they are on time with their payments or behind schedule.

We calculate the interest on the loan daily, adding the interest to the principle, and subtracting payments from the interest and principle. Late fees may also be applied.



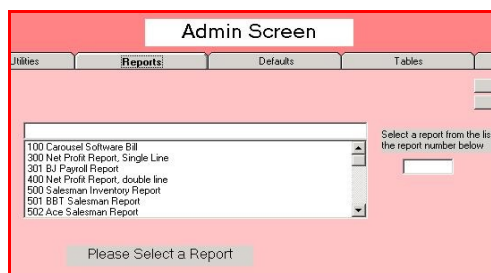
The Admin Program

This program is for use of the bookkeeper or other designated computer work in the dealership to do certain administrative tasks required by the other programs.

There are five tabs showing for this program.

The First Tab, “Admin Utilities”, contains two buttons. The first button, when clicked, will generate a Quickbooks Export file. This is then used by the Quickbooks program to update itself with new car, customer, and invoice data that my program knows about and has gathered. This way you do not have to do any double entry of data.

The other button on this tab allows you to unwind a deal. This takes a car that has been Sold and puts it back into inventory, like for instance if a deal fell through but you had already sold the car in the Deal program. It currently has some limitations: It will not put back trade ins. That will have to be done by Carousel Software manually.



The Reports Tab lists out a bunch of reports that you can run. We have an Idaho and a Washington Tax report, that has all the information needed for those state’s tax forms. We have a sales report, a salesman commission report, an Inventory report, and most important of all, a report that allows you to calculate your Carousel Software bill for the month.

The Defaults Tab allows you to change those default values that you need to play with. These would be local Tax rates, Printer Adjustment functions, and certain Dealer Specific options that my program can accommodate.

The Tables Tab allows you to edit data in the Salesman, Warrantee, Gap, and Car Forms database tables. So, if you hire (or fire) a salesman, use the Salesman Table to enter a new Salesman (or to make inactive an old one – never delete a salesman because some car deals point to him). If you need to access some new forms, use the Forms Table to do that.

Finally, the About Tab. This shows the version of the program currently in use, and the drop dead date. Here is where you would enter the funny number to modify the drop dead date (after you send us a check). Here also, you can display a copy of the license agreement that you signed, in case you were looking to take a nap in the afternoon and needed some legal jargon to read to get your eyes closed.