CDK MenuVantage
User Guide
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Chapter 1  CDK MenuVantage in a Nutshell

This User Guide can be used in two ways. When you are new to CDK MenuVantage, it is a great introduction to what CDK MenuVantage can provide your business (Chapter 1) and how to use the 6-step process to increase your profits (Chapter 2).

After you have been using CDK MenuVantage for a while, use this User Guide to further explore the advanced features of CDK MenuVantage, or to understand where menu selling is helping your bottom line, and how to get even better results.

You will come back to this User Guide again and again to get just the information you need when you need it.

<table>
<thead>
<tr>
<th>Chapter Title</th>
<th>What’s in it</th>
</tr>
</thead>
<tbody>
<tr>
<td>CDK MenuVantage in a Nutshell</td>
<td>Summary of how CDK MenuVantage can benefit your dealership.</td>
</tr>
<tr>
<td></td>
<td>An overview of how CDK MenuVantage works, and where what you see on the Menu came from.</td>
</tr>
<tr>
<td>6-Step Selling Process</td>
<td>How to use CDK MenuVantage to sell F&amp;I products during a vehicle deal.</td>
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<td>Biweekly Sales</td>
<td>Explains the additional steps in the selling process when your customer chooses biweekly payments.</td>
</tr>
<tr>
<td>Mine Your Data with Reports</td>
<td>CDK MenuVantage provides a gold-mine in data. Find out how to use the reporting feature to measure and improve your bottom line.</td>
</tr>
<tr>
<td>Sell Products Outside of the Car Deal</td>
<td>How to use CDK MenuVantage to sell F&amp;I products outside of a vehicle deal, for example in the Service Department.</td>
</tr>
<tr>
<td>eDeal Jacket</td>
<td>All Menus, Waivers, Sales Tools, and Contracts for each deal are available in the Electronic Deal Jacket. You can easily void contracts from this location.</td>
</tr>
<tr>
<td>Learn More</td>
<td>Links to where you can find more information about CDK and CDK products.</td>
</tr>
</tbody>
</table>
Why Use CDK MenuVantage?

CDK MenuVantage gives you all the selling tools and menu options you need to drive F&I sales, proven to help you effectively overcome objections and increase gross profit. Regardless of where you are or the device you are using, you can present menu options for your customers. Tablet-friendly, CDK MenuVantage lets you:

- Present from anywhere, anytime (Sales Tools, Videos)
- Run OFAC and Red Flag
- Generate eContracts, Menus, and Waivers
- Customers can either wet sign or electronically sign for all menu documents

Customers often want to create their own customized menu options. CDK MenuVantage offers an A La Carte menu, which combines traditional and consumer-driven menus, giving your customers a better, faster experience.

CDK MenuVantage offers integration with several product providers. We pull your rates from the provider’s web service in real-time displaying all options available for the vehicle being sold. When contracting is available, the contract data is submitted electronically to the provider for immediate access on their portal. E-rating and eContracting greatly reduce pricing errors and you will see program or pricing changes from your providers as they occur, with no need to request updates from CDK Support. This reduces pricing errors, saves time, and increases CSI.

Sell Even More F&I Add-on Products with Product Sale

Product Sale uses drag-and-drop navigation, electronic ratings, and online contracting to help you sell F&I related services in under a minute. Typically F&I Managers and Service Managers have dozens of opportunities to sell add-on products and services outside the car deal, but they hesitate or ignore the opportunity, because the process is too cumbersome and fraught with risk of error. With Product Sale, you simply add in the VIN, current miles, Vehicle In Service Date, and consumer name, drag and drop the product(s) you want to sell, and choose the coverage. After that, you are ready to quote—all in less than 60 seconds.

Product Sale helps your dealership:

- Increase penetration of F&I products
- Increase F&I department profit
- Capitalize on opportunities that occur outside the F&I office
- Reduce risk associated with what is normally a manual process
Features to Help You Maximize Your F&I Menu Selling

CDK MenuVantage helps increase F&I margins with our standardized menu presentation process. CDK MenuVantage can help your dealership by automatically pricing products, based on VIN, through the Electronic Rating System. You save time in the delivery process and reduce time spent correcting errors.

CDK MenuVantage helps you overcome pricing objections or monthly payment limitations by:

- Giving customers the option to accelerate their loan payoff with an automated, biweekly payment service that protects your reputation with an ‘error-free’ PaymentPlus Guarantee from US Equity Advantage (USEA).
- Helping customers understand the benefits of Vehicle Service Contracts, GAP Insurance, Maintenance Benefits and other menu items by providing product brochures and videos for the customer to review within the menu.
- Showing customers why they should pay for tomorrow’s repairs at today’s prices.

Best of all, CDK MenuVantage integrates with the CDK F&I system, so the numbers presented in the menu match the numbers of the final contracts. Plus, it is easy to fine tune pricing and demonstrate how the customer can add a service contract or other F&I products without increasing the price, just by making a half payment every two weeks. CDK MenuVantage gives you 16 payment presentations so customers can choose the options that are right for them.

DMS Integrations

In addition to CDK, CDK MenuVantage is integrated with the following DMS providers. That means that deals are drawn from DMS and the product sale information is pushed back to the DMS.

How Integration Works

CDK MenuVantage touches your DMS at four points in the process:
1. When you request a deal by deal number or stock number, CDK MenuVantage pulls the deal from your DMS. Be sure there are no F&I products preloaded on the deal and that you save and exit the DMS deal prior to pulling into Menu.

2. When you select a package to finalize your deal, CDK MenuVantage pushes the deal to your DMS but again, you must not be in the deal or the integration will not work. If you altered your original deal, it overwrites all deal information on the DMS and pushes all new products sold.

3. When you request a saved deal, CDK MenuVantage repulls the deal from the DMS and checks for any updated information. Then, you select which information (F&I products found) is the most current.

4. A nightly batch process updates the status of the deals in the Menu. This update reflects any changes made in the DMS after push back to ensure accurate Menu reports.

### Where the Menu You See Comes From

Prior to activation, a CDK Implementation Associate will help you set up and configure CDK MenuVantage to accommodate your dealership’s selling practices and product offerings. You can choose the names to be assigned to the column headers on the menu, the products to offer in each column and their order, and the retail markup to be used for each product.

Your menu will automatically be enabled with our ‘Limited Delete’ feature which will allow you to remove products from columns 2, 3 and 4 by the click of a button. (This function can be disabled upon request).

Your product costs will display on the Check Prices screen so that you are aware of the product profit margins at all times. This is for “working the deal” on the Check Prices screen and will not appear on the printed menu.

Your menu has a standard safeguard that prevents you from offering the product below its cost by mistake.

After your initial set up, should you want to alter the menu layouts, remove or add a product, you can fill out the “Add new Product” form or “Add New Template” form which are available by clicking the “Support” tab in the menu.

### History of CDK MenuVantage

CDK MenuVantage began its life as the independent company, MenuVantage in March of 2004. The MenuVantage product was first offered on the market in 2005. The company was acquired by ADP Dealer Services in June 2009. ADP continued to market the MenuVantage product to non-ADP DMS customers and rebranded the product as ADP webMenu for its own DMS customers.
In October 2014, ADP Dealer Services became CDK Global, and rebranded the product to CDK MenuVantage for all customers.

## Best Practices in Menu Selling

CDK MenuVantage gives you the option of setting up packages of products represented by columns in the menu, describes the product offerings, helps you overcome objections with the Sales Tools provided and increases your bottom line by selling more product. The following talk-track suggests the best way for the F&I Manager to present the menu and close the sale.

<table>
<thead>
<tr>
<th>Say</th>
<th>Do</th>
</tr>
</thead>
<tbody>
<tr>
<td>Your salesperson told me that you were given a payment of this much and we can deliver the vehicle to you at that payment, with lender approval. After talking about your particular needs, there are other options available. May I show them to you?</td>
<td>Show the pricing and APR at the top of the Customer View screen, tablet, or printed menu.</td>
</tr>
<tr>
<td>These are the numbers you agreed to.</td>
<td></td>
</tr>
<tr>
<td>By choosing the first column, you would receive …</td>
<td>Click the description to show a brochure or video about each product.</td>
</tr>
<tr>
<td>(explain each product, personalizing with information from your interview with the customer)</td>
<td></td>
</tr>
<tr>
<td>And these are your payment options when choosing this package.</td>
<td>Show the two payment options at the bottom of the column on the screen, tablet, or printout.</td>
</tr>
<tr>
<td>Do you have any questions on the products in this column?</td>
<td></td>
</tr>
<tr>
<td>Choosing the second column, you would receive the same benefits, however, you would forfeit the … products (explain the consequences of the loss).</td>
<td></td>
</tr>
<tr>
<td>And these are your payment options when choosing this package.</td>
<td>Show the two payment options at the bottom of the</td>
</tr>
<tr>
<td>Say</td>
<td>Do</td>
</tr>
<tr>
<td>-------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Repeat for the third column.</td>
<td>column on the screen, tablet, or printout.</td>
</tr>
<tr>
<td>Do you have any questions about any of these options before I ask you to choose one?</td>
<td>Answer their questions, perhaps showing the brochures or videos again.</td>
</tr>
<tr>
<td>Which option is best for you?</td>
<td>Listen to the objection and use it as an opportunity to upsell (move to a column more to the left).</td>
</tr>
<tr>
<td>If the customer selects the second or third column, say:</td>
<td>Click the A La Carte menu icon, and create a customized menu for this customer.</td>
</tr>
<tr>
<td>Just out of curiosity, is it the payment or the product itself that concerns you?</td>
<td>Show the two payment options at the bottom of the column on the screen, tablet, or printout.</td>
</tr>
<tr>
<td>If the customer does not select an option, say:</td>
<td>Click the biweekly payments button to display those payment options.</td>
</tr>
<tr>
<td>I’m a little curious, most customers find some value in at least one or two of these products. If you had to rank them, which would be first? Second?</td>
<td>Click next.</td>
</tr>
<tr>
<td>Here at <code>&lt;dealership name&gt;</code> we can create make a custom option for you. With these products, you payment options would be ...</td>
<td></td>
</tr>
<tr>
<td>If payment options are the objection, say:</td>
<td></td>
</tr>
<tr>
<td>The biweekly payment options we have available here at <code>&lt;dealership name&gt;</code> may provide more affordable payments for you.</td>
<td></td>
</tr>
</tbody>
</table>
Chapter 2  6 Steps to Sell the Product

The primary workflow contains 6 steps that are shown across the top of the CDK MenuVantage screen. To move from step to step, there is a button on the screen labeled **Next**, or you can go **Back**.

In this chapter, we will work one deal from beginning to end so you can see how the deal progresses through the screens.

1. **Start Deal**

Deals normally begin on the F&I screens on your DMS. If your DMS is integrated with CDK MenuVantage, you can retrieve the deal by deal number entered on the Start Deal tab. If your DMS is not integrated with CDK MenuVantage, you can create a new deal on this screen.

![Figure 1. Start Deal Screen](image)

Enter a deal number and click **Go**, or click **Create New Deal**.

Select the deal type from the popup. Deal types and the associated menus are set up for your dealership during the original install of CDK MenuVantage. They can be adjusted or new ones added by contacting CDK Support.
Once you select the deal type and menu, you select the bank and state.

Figure 2. Sample Select the Deal Type Dialog Box

Figure 3. Sample Select the Bank and State Dialog Box
2. Deal Info

The Deal Info screen shows you the deal information from the DMS or allows you to enter the new deal information. It displays in three expandable/collapsible sections: Customer Information, Vehicle Information, and Finance Information. Required fields are marked with a red asterisk.

![Deal Info Screen](image)

*Figure 4. Three Sections of the Deal Info Screen*
Review or enter the required information. Click **Next**.

When there is a problem with missing or incorrect information, you will see a red warning at the bottom of the page that says “A problem was encountered while processing this page. Please verify your entries.” Scroll up the page and you will notice the alert icon in red. Click on the icon to get an explanation of what the issue is with the data. This will help you fix the problem so that you can proceed to the next step.

![Error in a Field Image]

**Figure 5. Error in a Field**

When all the fields are correct, click **Next**.

### 3. Check Price

This screen displays all of your available products. After you have completed the customer interview, you can now use this screen to customize a menu by selecting a column of products and the specific coverage level and term that best meets the customer’s needs.

- Column 1 will display all of your available products. Columns 2, 3 and 4 usually step down (reducing the amount of products in each) or you can have all products in all columns and use the limited delete feature in columns 2, 3 and 4 to remove products not desired.

- In the “Manager” view, your product costs will display in parenthesis to the right of the retail price so you are always aware of your profit margins.
The base payment without products is displayed in the header of this screen and the payments including the products in each particular column are displayed at the bottom of the column, clearly showing how the products will affect their monthly payments.

If you choose to use this screen to interact with the customer, simply click the “Customer” view button which will remove any product cost and, if supplied by the provider, enable the customer to view a brochure or video to better explain the product to assist with their decision.

If no preset column of products suits the customer, you can create a custom column using the “A La Carte” option. When you click the A La Carte button it will bring up all of your available products and you simply put a check mark next to the products the customer chose.

After the customer has selected their products, you can print the menu from this screen by clicking the button near the bottom of the screen.

The printed menu will have a signature line at the bottom of each column for the customer to sign acknowledging which column of products they selected.

**Manager View**

In the manager view, you can adjust the menu as you talk to the customer about their needs. Then you switch to the customer view to let them choose the column that is best for them.

*Note.* The customer may be able to afford more products with a biweekly deal. See Chapter 3.
Figure 6. Manager View That Calls Out the General Features of this Screen

Figure 7. Manager View for Our Example Deal
A La Carte Menu

Click the symbol to specify an A La Carte menu. You can select any of the products you are set up to sell to customize a menu just for this customer. The selection is available on either the Manager or Customer View.

Figure 8. A La Carte Menu Selection box
Customer View

Expanded Description

When you expand the description by clicking on it, available brochures and videos are attached to help you sell the product. If you have access to a video or brochure that is not attached to the description, contact CDK Support to have it added. You can also specify the details for VSC Benefits here, if CDK MenuVantage cannot match them from the VIN.
Print Menu
You can print the menu for the customer from the Customer View, or from the Select Options Screen.

![Sample Printed Menu](image)

Figure 11. Sample Printed Menu

Saved Deals
When you are on this screen, the deal information is automatically saved so that you could leave CDK MenuVantage, do something else and return later. To return to this deal in progress, you select Saved Deals, find the deal and select it. CDK MenuVantage will re-pull the deal from the DMS and notify you if the deal in CDK MenuVantage differs from the current deal in the DMS. You can use the check boxes to decide which is most current, the menu system or the DMS.
4. Select Option

The Select Option screen gives you access to Options and to Sales Tools. The Sales Tools help you overcome objections from the customer by pointing out additional benefits of the product. Some of these are connected to the product description field on the Check Prices screen.

**Note.** All of these are moving to the Check Prices screen over time. Many are already available there.
<table>
<thead>
<tr>
<th>Option or Tool</th>
<th>What it Does</th>
<th>Other Access</th>
</tr>
</thead>
<tbody>
<tr>
<td>Print Menu</td>
<td>Print a copy of the menu in its current configuration.</td>
<td>Check Prices screen button</td>
</tr>
<tr>
<td>A La Carte Menu</td>
<td>Selects products to display on the A La Carte menu for a customer.</td>
<td>Check Prices screen icon</td>
</tr>
<tr>
<td>Edit Deal Info</td>
<td>Returns to the Deal Info screen</td>
<td>The Back button on the Check Prices screen.</td>
</tr>
<tr>
<td>Security Results</td>
<td>If you are configured for security check (OFAC and Red Flag), the information from the check is shown here.</td>
<td></td>
</tr>
<tr>
<td>Print Accept/Decline (Sign)</td>
<td>Print the accept/decline form. See Figure 14 and Figure 15 on pages 21 and 22. If you are set up for electronic signing, you can bypass the printing and sign the form electronically with a signature capture device or on a tablet.</td>
<td></td>
</tr>
<tr>
<td>Email the Menu</td>
<td>Opens a form to email the menu as an attachment to any email address. Includes a comment field so you can add a message to the recipient.</td>
<td></td>
</tr>
</tbody>
</table>

![Figure 14. Selection for the Accept/Decline Form](image)

Select the column, term, and display payment, and then click **Print Form**.
5. Select Package

On this screen, you make the selection of which package (column) the customer chooses to buy, and the bank they will finance with. You have the ability to change the bank on this screen. The list of banks is retrieved from the DMS. When you add a new bank on your DMS, contact CDK Support to get it added to this list. If the customer chooses a biweekly payment, check the box. (See Chapter 3 for details of Biweekly selling.) You can show or hide the details. Click Next. If your DMS is integrated with CDK MenuVantage, the information is pushed to the DMS deal.
If you sold a non-web-rated product, you prepare the contract using the DMS outside of CDK MenuVantage. A web-rated product uses the Provider Exchange Network (PEN) to continually update eligible levels/pricing/options to minimize selection errors and to electronically process contracts directly with the provider’s portal.

For all web-rated products, the contract wizard prepares eligible contracts here. The provider may require more information for their contract than you entered on the Deal Information page. If necessary, you will be prompted to the setup engine page to enter the required information, then Continue takes you to the contracting page.
Finalize Deal

It is very important to finalize the deal with the button in the contract wizard. This pushes the deal information back to the DMS immediately.

**Note.** Be sure that the DMS deal is not open at this time. If it is, the write back integration will not work.
Finalizing the deal with keep the DMS and CDK MenuVantage reports in sync. If you fail to finalize the deal here, the DMS and CDK MenuVantage information may not match.

6. Print Recap

The recap allows you to verify your deal information. You can print this page to include in your deal jacket and click the “View Details” check box to display the cost of each product sold for the office to use for reconciliation. Since the web-rated product costs come directly from the provider, you don’t need to spend additional time re-rating the VIN in their portal to confirm costs.

Figure 19. Sample Recap
Chapter 3  Biweekly Deals

A Biweekly deal is sold in the same way as a regular deal, using the same 6-step process, with just a few additions to enroll in the payment plan. Those additional activities are presented in this Chapter, step by step. You need to be fully familiar with the 6-step process presented in Chapter 2 because you will do that process as well as these additions.

Use biweekly deals to overcome objections in highly payment conscious customers. In our example here, the customer does not want to spend any more than the base payments he was quoted, nor does he want to extend the finance contract to a longer term. Based on those requirements, he does not expect to buy any additional F&I products. With biweekly payments, you can show him how he can afford an extended service contract at the base payment and still pay it off in 60 months.

The same strategy can be used to sell customers more products or pay off their loan in a shorter time period.

1. Start Deal

Start the deal as you normally would by entering the deal number, or creating a new deal. Select the template and bank for financing. Click Next to proceed to the Deal Info screen.

2. Deal Info

On the Deal Info screen, the terms and the days to first payment are critical for the biweekly option. Be sure to display two terms, and at least 42 days to the first payment if byweekly payments are a possibility for this sale.
3. Check Price

The Check Price screen shows the monthly payment base price. Since the customer is firm in spending no more than that amount, enter that amount in the rollback calculator at the bottom of the page. It calculates that the customer would have to either provide $1,056.92 in down payment, or get discounts of that amount to purchase all three of the packages in the Basic column.

Figure 20. Deal Info Screen for Bi-weekly Payments
Figure 21. Using the Rollback Calculator

By removing the Road Hazard Tire and Appearance Packages, and discounting the Extended Service Contract, you can bring the monthly payment back to the base payment but at the 66 month term.

Figure 22. Adjusted Check Prices Page

By making the monthly payment in two biweekly payments, the loan is paid off in 60 months rather than in 66 months, for no more monthly payment!
4. Select Option

On the Select Option page, the Biweekly Benefits sales tool helps you convince the customer how much more product he can afford, how much he can save in interest cost, or how much sooner the loan would be paid off by going with the biweekly payments.
Chapter 3 Biweekly Deals

Figure 24. Biweekly Benefits Sales Tool

Figure 25. Biweekly Benefits Form Selection Screen
EQUITY ADVANTAGE PROGRAM (EAP) EXPLANATION OF BENEFITS

Customer Information:
Customer Name: John Doe
Vehicle: 2014 Chevrolet Impala
Amount Financed: $24,980.50
APR: 7.49

Financing Information:
Purchase Date: 10/15/2015
First Payment Due: 11/29/2015
Last Payment Date: 4/29/2021
Monthly Payment: $464.30
Term: 60

EAP Information:
Date of 1st Debit: 11/2/2015
Date of Last Debit: 10/23/2020
Biweekly Payment: $232.19
Reduced Term: 60
Term Reduction: 6

Dear Car Buyer:

As with your home mortgage, you can now take advantage of the benefits of a Biweekly payment program for your new vehicle purchase. Buying an automobile is generally the second largest investment that a person makes, right after the purchase of their home, so why not be entitled to the same method of payment?

U.S. Equity Advantage Program

Most people are paid every two weeks, and Biweekly loan payments have become a popular form of budgeting. The payments are much smaller than monthly amounts, and can be automatically debited from your checking account on or around the day that you receive your paycheck. The end result is a fast and easy way to build equity in your vehicle – saving interest, and reducing the term of your loan. Let’s look at your specific example below:

Interest on your loan if paid monthly: $5,696.59
Interest if paid bi-weekly: $5,155.10 (after EAP Fee)
Savings: $513.48

Customized ALG™ Residual Estimate

Automotive Lease Guide has been the benchmark for residual values in the United States and Canada for over 35 years. ALG is the #1 recognized source for residual values, analytical data products and consultation to the Automotive Industry. According to the ALG residual guides, this is how your vehicle will depreciate over the final months of your loan:

Vehicle: 2014 CHEVROLET IMPALA
ALG Residual Value at 60 months: $5,751.43
ALG Residual Value at 66 months: $4,571.79
Depreciation savings: $1,179.64

If you plan to keep your vehicle for the full loan term, this is how the program helps you:
Interest savings: $513.48
Depreciation savings (+) $1,076.64
Lease Defeit Fees (-) $250.45
Total Benefit: $1,330.67

If you plan to trade your vehicle in after three and a half years, this is how the program helps you:
Loan balance at 42 months: $10,320.56
Loan balance with EAP (-) $6,657.25
Improved equity position: $3,663.33
Debit Fees for 42 months (-) $177.45
Total Benefit: $1,488.88

Wachovia Bank, N.A. is our exclusive processor of electronic payments. Wachovia N.A. is required by law to be fully compliant with the Federal Reserve’s requirements for Automated Clearing House (ACH) payments as defined under Regulation E and is a member of the FDIC. A household name with 13 million household and business customers, Wachovia is the fourth largest bank holding company in the United States based on assets. Wachovia currently has more than $700 billion in assets and more than $400 billion on deposit. For more information, go to www.Wachovia.com. Wachovia will process the automatic debit of your account, and your funds will be on deposit in our FDIC insured account with Wachovia, N.A. until they are sent to your lender, on or before your next due date. Enroll today and take advantage of the Equity Advantage. It will save you time and money.

* All calculations are estimates only based upon information given by the consumer. Actual savings and term reduction may vary due to factors including but not limited to interest rate, payment dates, or late fees. ** ALG residual estimates represent typical experience for the given model.

Figure 26. Sample Biweekly Benefits Sales Tool
5. Select Package

On the Select Package screen, be sure to check the Biweekly box to generate the enrollment form for the biweekly payments.

![Select Package Screen]

Figure 27. Select Package Screen

When you click **Next**, if the packages selected are web-rated, you will proceed to the Contract Wizard to prepare the contracts. If the products are not web-rated, you prepare the contracts on the DMS.

6. Print Recap

For biweekly deals, you must click **Print Biweekly Enrollment Form** at the bottom of the screen.
Figure 28. Print Recap Screen

On the Biweekly Enrollment Setup Form, be sure to fill in as many missing required fields as you can. If any are missing when you print, they can be hand written in later.
Figure 29. Biweekly Enrollment Form Setup Page

Very important to enter the Monthly Payment from your DMS, the amount that will be on the bank contract! Sometimes the Menu varies from the DMS shortly.

Discuss the date of first debit with the customer. Ideally matching withdrawals to their pay cycle.
Figure 30. Error Popup

If any required fields are left blank, this message pops up but you can click “Cancel” to ignore if necessary and hand write the information in later (bank routing #, etc.)
Especially important to review the Debit information and Membership Fees for accuracy.

Figure 31. Sample Debit Agreement
The completed and signed Debit Agreement goes to US Equity Advantage for processing.

**Biweekly Deals Tab**

You can track the progress of biweekly deals after they go to US Equity Advantage on the Biweekly Deals tab. Use the search feature to find a particular one, or see the ones for a particular month.

Deals are listed under Non-Boarded until the enrollment is successful. Then the deal is listed under Boarded Biweekly Deals.

![Figure 32. Biweekly Deals Tab](image)

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Figure 33. US Equity Advantage Website
Chapter 4  Mine Your Data with Reports

The data in the reports is affected by the options you choose when setting up CDK MenuVantage, for instance, you can choose to send back cost or only retail.

CDK MenuVantage provides a lot of business information. The most helpful reports are:

- **Gross Comparison Report** - Summary analysis of lost F&I gross profit based on non Menu usage. The report is by F&I producer, PVR on Menu deals compared to PVR on non Menu deals. This is a great report for accountability and validation of individual’s compliance of CDK MenuVantage usage and lost revenue for non compliance. The comparison is by F&I person and total store performance.

- **Finance Report** – Summary report contains all Per Vehicle Retail (PVR) numbers, product indexes and percentages, and gross per product sold. It is the same format for each F&I producer and Store totals, all in one PDF. It includes total deals that are processed through the DMS with memos to not how many “printed menus”, how many “selected products”, and how many “non-costed deals” are in the report.

- **Activity Report** – Detailed report by F&I producer, by deal number, with costumer name and purchased vehicle. It summarizes the number of products sold, printed menu (Y or N), products selected (Y or N), and half pay (Y or N).

- **F&I Control Log** - Traditional F&I log with details on all transactions in a table format, Menu and non Menu deals. Transactions are broken down by New, Used, Financed, Cash, and Lease. This report is dynamic. It will create a column for a product when your department has sold one. Otherwise the product, even though available, will not show on the report. It will give subtotals for each category and totals for the entire department, unit counts, gross dollars, and PVR (per vehicle retail).

Explore the available reports and you will quickly find your favorites. Select the report and the date range, then click Generate.
Figure 34. Reports Screen

The reports you can choose from are:

Figure 35. Available Reports
Chapter 5  Sell Products Outside of a Car Deal

You can sell products even after the vehicle deal is complete. For example, any car in the service lane could be sold a product, even if you did not sell the customer their vehicle. CDK MenuVantage facilitates these sales on the Product Sale tab. An F&I Manager is not required to be involved in the sale; anyone with access to CDK MenuVantage can complete the sale.

Product Sale Process

If the customer bought their vehicle from you, you can retrieve the existing deal. Or, you can start a new deal for a new customer, or a service-only customer.

Figure 36. Product Sale Tab, Starting Page

If you retrieve an existing deal, the customer and vehicle information is populated on the next page. If you start a new deal, you will enter the information yourself.
The packages that can be sold are controlled by the template you choose, filtered by the year and model of vehicle. Required fields have a red asterisk (*). Click Next.

On the Product Selection screen, drag and drop the desired products to the panel on the right.
Make your level selections in the Selected Products Panel. The total price is listed at the bottom of the page as you make adjustments. You can print the quote here or email it to the customer.

Figure 39. Completed Product Sale page

Click **Next** to initialize the Contract Wizard to prepare the contracts for the web-rated products. If the products sold are not web-rated, you prepare those contracts on the DMS.
Figure 40. Example Printed Quote
Chapter 6 eDeal Jacket

The eDeal Jacket tab gives you access to an electronic deal jacket which contains your printed Menus, Waivers, Sales Tools, and Contracts for each F&I Menu deal. For most product providers, voiding a contract in CDK MenuVantage will also void it in their system. This is the most convenient place to void a contract.

![Figure 41. Search for the Deal in eDeal Jacket](image)

Once you identify the deal jacket you want, click **Open**.

On the pop-up dialog box, you can view any of the Sales Tools or Printed Menus for this deal by clicking **View**. You can view any of the contracts, reprint them if necessary, email them to the customer, or you can void a contract by clicking **Void** in the status column.
Figure 42. Example eDeal Jacket
Chapter 7  Learn More

**Release Essentials**
For information about new product releases, go to your application Help menu and select Release Essentials.

**Online Help**
Get instant information about your application screen. Click the Help button (?) or F1 for context help in CDK Drive and other applications.

**Service Connect**
Get expert support and guidance without picking up the phone or leaving your desktop. You can search the document library, collaborate with industry peers in the Service Connect Community, web chat with Support, and more.
Click the Service Connect tab on your desktop to get started, or download the mobile app for Apple or Android.

**CDK Learning Connect**
Access hundreds of training courses, easy-to-use tools, and interactive resources. Log in for current schedules, registration, instructor-led learning, and e-Learning.
USA and Canada: cdklearningconnect.com
Canada Français: cdklearningconnect.fr
Additional Resources

Forms and Supplies
Call the number below and request supplies using the EasySource catalog number, or send an email to easysource@cdk.com with the following information: CMF number, dealership name, contact name, phone.

USA: 800-237-2372
Canada: 877.847.9276