



Software User Guide

Setups

This user guide breaks down how to use the setup tabs to adjust Products, Lenders, Menus, the Product Disclosure, Report Goals, and Employee Adjustments.

If you have vSignature or Vision Touch you will have a vSignature tab, and with Vision Touch you will also have the Interview tab and Vision Touch tab.



VISION MENU

Products | Lenders | Menus | Product Disclosure | F&I Analyzer Goals | Employees | vSignature | Interview | Vision Touch



Browsers: All

Website: Visionmenu.com

Products Tab: How to adjust your products



VISION MENU

Products | Lenders | Menus | Product Disclosure | F&I Analyzer Goals | Employees | vSignature | Interview | Vision Touch

Products



VISION MENU

Config | Taxes & Fees | **Products** | Lenders | Menus | Product Disclosure | F&I Analyzer Goals | Users | Employees | Fiscal Months | vSignature | Interview | Vision Touch

Products

PRODUCT NAME	TYPE	ASSOCIATED PLUGIN	PRICE	
*GAP	GAP	--	\$0.00	Delete
*Theft	Etching	--	\$0.00	Delete
*Tire & Wheel	TireWheel	--	\$0.00	Delete

Note: If the product is setup to eRate and eContract, then you will see the product provider's name listed underneath the Associated Plugin section. If you don't see the name and the product should be e-rating then please let support@visionmenu.com know, and we will get them setup!

Vehicle Service Contract

Product ID: 163060

Product Name:

Abbreviation:

Price:

Cost:

You can easily change the name of the product on the menu in the Product name field.

The abbreviation controls how the product shows on reports.

Price: Controls the default retail.

Cost: Only needs to be entered if the product doesn't e-Rate.

Product Descriptions are what will appear on the menus and disclosures.

PRODUCT DESCRIPTION

Add product description taglines to appear when the menu is printed. Each tagline should be a short line consisting of one or two small sentences.

- Pays 100% of covered Labor and Parts. Includes Towing, Rental and Roadside Assistar
- Comprehensive mechanical & electrical breakdown coverage

IMPORTANT!

You must hit save once any changes are complete

Lenders Tab: How to Add / Edit a Lender



VISION MENU

Products | **Lenders** | Menus | Product Disclosure | F&I Analyzer Goals | Employees | vSignature | Interview | Vision Touch

Lenders

Add a lender by clicking on "Add Lender" on the bottom left of the page.

Add Lender

Lender Name:

Abbreviation:

Master Lender:

Then you will need to enter the name, and select it from our master list. After the master lender is chosen, click on "Submit" which will be on the right hand side of the page.

Ally

LENDER INFORMATION

Lender Name:

Abbreviation:

Lender Address 1:

Lender Address 2:

City:

State:

Zip:

Phone:

Additional info can be entered after the lender is created. See below on how to adjust a lender.

To adjust the lender information, first click on the name of the lender to open the dropdown for editing.

You can adjust the address, phone number, and name here.

Save

Important! You must click save on the bottom right hand side of the page.

If your dealership needs a list of lenders added, or if you are experiencing any lender issues, please call 260-755-3224 or send an email to Support@visionmenu.com

Full Screen View Of Adding A Lender



VISION MENU

Products **Lenders** Menus Product Disclosure F&I Analyzer Goals Employees

A-F	G-L	M-R	S-V	W-Z	All
LENDER NAME					
MID OREGON FCU					
MINT VALLEY FCU					
NISSAN MOTOR ACCEPTANCE CORP					
NORTHWEST COMMUNITY CREDIT UNION					
NW PRIORITY CREDIT UNION					
OCCU					
OLD NATIONAL BANK					
ONPOINT COMMUNITY CREDIT UNION					
ONPOINT COMMUNITY CU					
OREGON COMMUNITY CREDIT UNION					
OREGONIANS CREDIT UNION					
OUR COMMUNITY CREDIT UNION					
OUTSIDE LIEN					
OUTSIDE LIEN					
PACIFIC NW FEDERAL CREDIT UNION					
PNC Bank					
POINT WEST CREDIT UNION					
PRESTIGE FINANCIAL SERVICES INC					
PRONTO FINANCE					
RED CANOE CREDIT UNION					
REGIONAL ACCEPTANCE CORP					
REGIONAL ACCEPTANCE CORP					
RIVERMARK COMMUNITY CREDIT UNION					
Add Lender					



VISION MENU

Products **Lenders** Menus Product Disclosure F&I Analyzer Goals Employees vSignature Interview Vision Touch

A-F	G-L	M-R	S-V	W-Z	All
LENDER NAME					
ADVANTIS CREDIT UNION					
LENDER INFORMATION					
Lender Name:	<input type="text" value="ADVANTIS CREDIT UNION"/>				
Abbreviation:	<input type="text"/>				
Lender Address 1:	<input type="text" value="PO BOX 14220"/>				
Lender Address 2:	<input type="text"/>				
City:	<input type="text" value="PORTLAND"/>				
State:	<input type="text" value="OR"/>				
Zip:	<input type="text" value="97293"/>				
Phone:	<input type="text" value="5037852542"/>				
Last modified by Max on 6/7/2019 10:01:37 AM					
<input type="button" value="Save"/>					

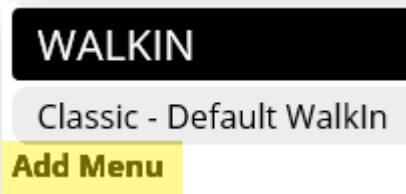
Menus Tab: How to add a menu



VISION MENU

Products | Lenders | **Menus** | Product Disclosure | F&I Analyzer Goals | Employees | vSignature | Interview | Vision Touch

Menus



To add a menu, scroll down to the bottom of the screen. Under the Walk-in Menu you will see the “Add Menu” button.

Add Menu

Menu Name:

Menu Options: 4

Menu Associations

Finance Deals
 Lease Deals
 Cash Deals

Menu Products

Select the products that will appear on the menu.

Guaranteed Asset Protection
 Vehicle Service Contract

Then a dropdown box will allow you to enter a custom menu name.

Please select how many columns you want on the menu.

Then select the deal type for the menu.

You can also select the products you wish to have on the menu.

Note: All menus will start with the Classic Menu Style. Please review the next page on how to adjust the menu once created.

Submit

Cancel

Important!

Please click Submit to create the menu.

Menu Tab: How to adjust a menu



VISION MENU

Products | Lenders | **Menu** | Product Disclosure | F&I Analyzer Goals | Employees | vSignature | Interview | Vision Touch

Menus

General Settings

This section is to update the Menu Name, Menu Type, Number of Columns, Color (Menu's name), Bold (the menu name).

Finance Options

You can add a default 2nd term and a specific interval. You can default the days to 1st too.

Vehicle Settings

Select if the menu is going to be for Auto, RV, Powersports, and / or Marine vehicles.

Menu options

(At the top) You can change the title on the printed menu.

Menu Types (Example Menu Styles are included!)

Classic (default)	Header	Header Extended	Simple	2-Column Needs Analysis
1-7 Products	1-10 Products	1-8 Products	10 Plus Products	3-10 Plus Products

Menu Options

(At the Bottom) You can change the defaults for the menu template here.

Note: DMS Term and Interest pull in through the certified interface., and override the defaults listed. You can toggle the default for the products on / off in each column.

delete

To Delete a product, just click the delete button on the far right.

Add Product

You can add products using the drop down to select the product first.

Change Order

Change the order of products by clicking Change Order, then using the arrows to move the product up and down.

Customize

Colors

You can control the colors for the text on the menu, the columns, and the header area of the menu.

Color Products by Column
If unchecked the menu will be colored by rows.

Options

You have control to move the base payment to the top or into the summary verbiage.

You can show the interest rate next to the payments.

You can have the menu display Portrait or landscape.

You can also have different product pricing for the products on the menu.

None
Total
Monthly
Daily
Total and Monthly

Preview:

Use the preview to click and see the menu in a PDF.

Please contact Support@visionmenu.com or call 260-755-3224 if you have any questions about setting up your menus. We are happy to help!

Full Screen View of Menu Set-Up

Classic - 3 Option 1 Term
Customize

General Settings

Menu Name:

Menu Type: Classic
Product name with a description underneath. Best used for 1-7 products.

Menu Columns:

Color:

Bold:

Finance Options

2 Terms, Increase 2nd Term Months

Days until 1st payment is due

Menu options

Header on printed menu:

* Defaults to Repayment Options if nothing entered

Vehicle Settings

Check the vehicle types that are available to this menu.

Cars

Trucks

SUVs

Vans

Menu Options

	Option 1	Option 2	Option 3	
Option Name:	<input type="text" value="Option 1"/>	<input type="text" value="Option 2"/>	<input type="text" value="Option 3"/>	
Term:	<input type="text" value="60"/>	<input type="text" value="60"/>	<input type="text" value="60"/>	
Interest:	<input type="text" value="5.00"/> %	<input type="text" value="5.00"/> %	<input type="text" value="5.00"/> %	
Payment Type:	<input type="text" value="Monthly"/>	<input type="text" value="Monthly"/>	<input type="text" value="Monthly"/>	
-Protective VSC	<input checked="" type="checkbox"/> \$1,500.00 <small>Cost: \$0.00</small>	<input checked="" type="checkbox"/> \$1,500.00 <small>Cost: \$0.00</small>	<input checked="" type="checkbox"/> \$1,500.00 <small>Cost: \$0.00</small>	delete
Port GAP	<input checked="" type="checkbox"/> \$695.00 <small>Cost: \$398.00</small>	<input checked="" type="checkbox"/> \$695.00 <small>Cost: \$398.00</small>	<input type="checkbox"/> \$695.00 <small>Cost: \$398.00</small>	delete
-Tire & Wheel	<input checked="" type="checkbox"/> \$595.00 <small>Cost: \$299.00</small>	<input checked="" type="checkbox"/> \$595.00 <small>Cost: \$299.00</small>	<input type="checkbox"/> \$595.00 <small>Cost: \$299.00</small>	delete
-Windshield Protection	<input checked="" type="checkbox"/> \$0.00 <small>Cost: \$0.00</small>	<input type="checkbox"/> \$0.00 <small>Cost: \$0.00</small>	<input type="checkbox"/> \$0.00 <small>Cost: \$0.00</small>	delete
-Key Replacement	<input checked="" type="checkbox"/> \$599.00 <small>Cost: \$0.00</small>	<input type="checkbox"/> \$599.00 <small>Cost: \$0.00</small>	<input type="checkbox"/> \$599.00 <small>Cost: \$0.00</small>	delete

-Credit Life
Add Product
Change Order

Classic - 3 Option 1 Term
Customize

Fonts

Product Area:

Colors

Report Header Color:

Product Text Color:

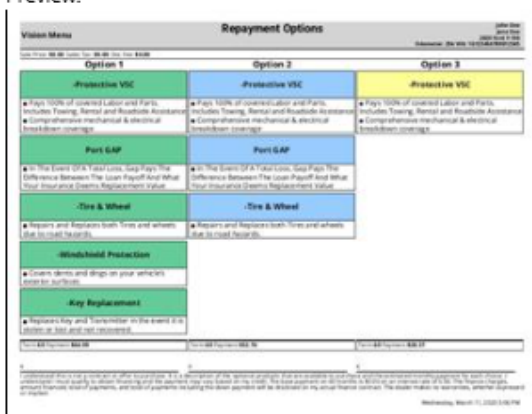
Color Products by Column

Option 1 :

Option 2 :

Option 3 :

Preview:



Click the image to view the full-size preview.

Options

Move Base Payment to Bottom Summary Verbiage

Show Interest Rate in Payment Area

Signature Line for Each Option

Page Layout:

Display Amount Financed by Column

Show Product Prices:

*Note: We recommend portrait if you are using more than 8 products on a menu.

Classic Menu Template

VisionMenu Automotive

Repayment Options

John Doe
Black 2019 Ford F 150
Odometer: 249 VIN: 1G123456789012345

Sale Price: **\$27,652.00** Sales Tax: **\$1,935.64** Doc Fee: **\$72.50** Other Fees: **\$50.00**

Platinum	Gold	Silver	Bronze
Vehicle Service Contract	Vehicle Service Contract	Vehicle Service Contract	Vehicle Service Contract
<ul style="list-style-type: none"> Pays 100% of covered Labor and Parts. Includes Towing, Rental and Roadside Assistance Comprehensive mechanical & electrical breakdown coverage 	<ul style="list-style-type: none"> Pays 100% of covered Labor and Parts. Includes Towing, Rental and Roadside Assistance Comprehensive mechanical & electrical breakdown coverage 	<ul style="list-style-type: none"> Pays 100% of covered Labor and Parts. Includes Towing, Rental and Roadside Assistance Comprehensive mechanical & electrical breakdown coverage 	<ul style="list-style-type: none"> Pays 100% of covered Labor and Parts. Includes Towing, Rental and Roadside Assistance Comprehensive mechanical & electrical breakdown coverage
GAP	GAP	GAP	GAP
<ul style="list-style-type: none"> In The Event Of A Total Loss, Gap Pays The Difference Between The Loan Payoff And What Your Insurance Deems Replacement Value 	<ul style="list-style-type: none"> In The Event Of A Total Loss, Gap Pays The Difference Between The Loan Payoff And What Your Insurance Deems Replacement Value 	<ul style="list-style-type: none"> In The Event Of A Total Loss, Gap Pays The Difference Between The Loan Payoff And What Your Insurance Deems Replacement Value 	<ul style="list-style-type: none"> In The Event Of A Total Loss, Gap Pays The Difference Between The Loan Payoff And What Your Insurance Deems Replacement Value
Maintenance	Maintenance	Maintenance	
<ul style="list-style-type: none"> Ensures proper maintenance on your vehicle and offers convenience and exceptional value Prepays your vehicle's service visits to ensure proper maintenance 	<ul style="list-style-type: none"> Ensures proper maintenance on your vehicle and offers convenience and exceptional value Prepays your vehicle's service visits to ensure proper maintenance 	<ul style="list-style-type: none"> Ensures proper maintenance on your vehicle and offers convenience and exceptional value Prepays your vehicle's service visits to ensure proper maintenance 	
Windshield Protection	Appearance Product		
<ul style="list-style-type: none"> Films Block Heat and UV Rays. Keep the vehicle cool and reduce glare from other vehicles. 	<ul style="list-style-type: none"> Keep your Car looking NEW and SHINY with this amazing product. Maintains resale value and appearance 		
Appearance Product			
<ul style="list-style-type: none"> Keep your Car looking NEW and SHINY with this amazing product. Maintains resale value and appearance 			
Key Replacement			
<ul style="list-style-type: none"> Comprehensive mechanical & electrical breakdown coverage 			
Theft			
<ul style="list-style-type: none"> Reduces Odds of Theft & Increases Odds of Theft Recovery; Keeps Personal Belongings Safer 			
Term 60 Interest Rate 7.99 Payment \$699.80	Term 60 Interest Rate 7.99 Payment \$681.74	Term 60 Interest Rate 7.99 Payment \$673.70	Term 60 Interest Rate 7.99 Payment \$662.63

X _____ X _____ X _____ X _____

I understand this is not a contract or offer to purchase. It is a description of the optional products that are available to purchase and the estimated monthly payment for each choice. I understand I must qualify to obtain financing and the payment may vary based on my credit. The base payment on 60 months is \$598.29 on an interest rate of 7.99. The finance charges, amount financed, total of payments, and total of payments including the down payment will be disclosed on my actual finance contract. The dealer makes no warranties, whether expressed or implied.









Header Menu Template

VisionMenu Automotive

Repayment Options

John Doe
Black 2019 Ford F 150
Odometer: 249 VIN: 1G123456789012345

Sale Price: **\$27,652.00** Sales Tax: **\$1,935.64** Doc Fee: **\$72.50** Other Fees: **\$50.00**

VEHICLE SERVICE CONTRACT  Pays 100% of covered Labor and Parts. Includes Towing, Rental and Roadside Assistance Comprehensive mechanical & electrical breakdown coverage	GAP  In The Event Of A Total Loss, Gap Pays The Difference Between The Loan Payoff And What Your Insurance Deems Replacement Value	MAINTENANCE  Ensures proper maintenance on your vehicle and offers convenience and exceptional value Prepays your vehicle's service visits to ensure proper maintenance	DENT & DING  Covers dents and dings on your vehicle's exterior surfaces
APPEARANCE PRODUCT  Keep your Car looking NEW and SHINY with this amazing product. Maintains resale value and appearance	WINDSHIELD PROTECTION  Films Block Heat and UV Rays. Keep the vehicle cool and reduce glare from other vehicles.	KEY REPLACEMENT  Comprehensive mechanical & electrical breakdown coverage	THEFT  Reduces Odds of Theft & Increases Odds of Theft Recovery; Keeps Personal Belongings Safer

Platinum	Gold	Silver	Bronze
Vehicle Service Contract	Vehicle Service Contract	Vehicle Service Contract	Vehicle Service Contract
GAP	GAP	GAP	GAP
Maintenance	Maintenance	Maintenance	
Dent & Ding	Dent & Ding		
Appearance Product	Appearance Product		
Windshield Protection			
Key Replacement			
Theft			

Term 60 Interest Rate 7.99 Payment \$710.88	Term 60 Interest Rate 7.99 Payment \$692.81	Term 60 Interest Rate 7.99 Payment \$673.70	Term 60 Interest Rate 7.99 Payment \$662.63
--	--	--	--

X _____ X _____ X _____ X _____

I understand this is not a contract or offer to purchase. It is a description of the optional products that are available to purchase and the estimated monthly payment for each choice. I understand I must qualify to obtain financing and the payment may vary based on my credit. The base payment on 60 months is \$598.29 on an interest rate of 7.99. The finance charges, amount financed, total of payments, and total of payments including the down payment will be disclosed on my actual finance contract. The dealer makes no warranties, whether expressed or implied.









Header Extended Menu Template

VisionMenu Automotive

Repayment Options

John Doe
Black 2019 Ford F 150
Odometer: 249 VIN: 1G123456789012345

Best Price Incl. Adds:	\$27,652.00	Cash Down Incl. Rebates:	\$0.00	Rate	Term	Payment
Trade Value:	\$0.00	Taxes/Fees:	\$2,058.14	7.99	60	\$598.29
Trade Payoff:	\$0.00	Balance:	\$29,710.14			

<p>VEHICLE SERVICE CONTRACT</p>  <p>Pays 100% of covered Labor and Parts. Includes Towing, Rental and Roadside Assistance Comprehensive mechanical & electrical breakdown coverage</p>	<p>GAP</p>  <p>In The Event Of A Total Loss, Gap Pays The Difference Between The Loan Payoff And What Your Insurance Deems Replacement Value</p>	<p>MAINTENANCE</p>  <p>Ensures proper maintenance on your vehicle and offers convenience and exceptional value Prepays your vehicle's service visits to ensure proper maintenance</p>	<p>DENT & DING</p>  <p>Covers dents and dings on your vehicle's exterior surfaces</p>
<p>APPEARANCE PRODUCT</p>  <p>Keep your Car looking NEW and SHINY with this amazing product. Maintains resale value and appearance</p>	<p>WINDSHIELD PROTECTION</p>  <p>Films Block Heat and UV Rays. Keep the vehicle cool and reduce glare from other vehicles.</p>	<p>KEY REPLACEMENT</p>  <p>Comprehensive mechanical & electrical breakdown coverage</p>	<p>THEFT</p>  <p>Reduces Odds of Theft & Increases Odds of Theft Recovery; Keeps Personal Belongings Safer</p>

Platinum	Gold	Silver	Bronze
Vehicle Service Contract	Vehicle Service Contract	Vehicle Service Contract	Vehicle Service Contract
GAP	GAP	GAP	GAP
Maintenance	Maintenance	Maintenance	
Dent & Ding	Dent & Ding		
Appearance Product	Appearance Product		
Windshield Protection			
Key Replacement			
Theft			
Term 60 Interest Rate 7.99 Payment \$710.88	Term 60 Interest Rate 7.99 Payment \$692.81	Term 60 Interest Rate 7.99 Payment \$673.70	Term 60 Interest Rate 7.99 Payment \$662.63

X _____ X _____ X _____ X _____

I understand this is not a contract or offer to purchase. It is a description of the optional products that are available to purchase and the estimated monthly payment for each choice. I understand I must qualify to obtain financing and the payment may vary based on my credit. The base payment on 60 months is \$598.29 on an interest rate of 7.99. The finance charges, amount financed, total of payments, and total of payments including the down payment will be disclosed on my actual finance contract. The dealer makes no warranties, whether expressed or implied.

Simple Menu Template

VisionMenu Automotive

Repayment Options

John Doe
Black 2019 Ford F 150
Odometer: 249 VIN: 1G123456789012345

Sale Price: **\$27,652.00** Sales Tax: **\$1,935.64** Doc Fee: **\$72.50** Other Fees: **\$50.00**

Platinum	Gold	Silver	Bronze
Vehicle Service Contract	Vehicle Service Contract	Vehicle Service Contract	Vehicle Service Contract
GAP	GAP	GAP	GAP
Maintenance	Maintenance	Maintenance	
Dent & Ding	Dent & Ding		
Appearance Product	Appearance Product		
Windshield Protection			
Key Replacement			
Theft			

Term **60** Interest Rate **7.99** Payment **\$710.88**

Term **60** Interest Rate **7.99** Payment **\$692.81**

Term **60** Interest Rate **7.99** Payment **\$673.70**

Term **60** Interest Rate **7.99** Payment **\$662.63**

X _____ X _____ X _____ X _____

I understand this is not a contract or offer to purchase. It is a description of the optional products that are available to purchase and the estimated monthly payment for each choice. I understand I must qualify to obtain financing and the payment may vary based on my credit. The base payment on 60 months is \$598.29 on an interest rate of 7.99. The finance charges, amount financed, total of payments, and total of payments including the down payment will be disclosed on my actual finance contract. The dealer makes no warranties, whether expressed or implied.

2-Column Needs Analysis Menu Template

REPAYMENT OPTIONS

John Doe
123 Apple Street
Fort Wayne, IN 46825

Ford F 150

2019

Odometer 249

VIN 1G123456789012345

Date Sold 8/16/2019

Lender BANK OF AMERICA
State Indiana

















Sale Price \$27,652.00

Doc Fee \$72.50

Other Fees \$50.00

Sales Tax \$1,935.64

Balance **\$29,710.14**

Complete Protection	Customer Package
<p>Vehicle Service Contract</p>  Pays 100% of covered Labor and Parts. Includes Towing, Rental and Roadside Assistance Comprehensive mechanical & electrical breakdown coverage	<p>Vehicle Service Contract</p>  Pays 100% of covered Labor and Parts. Includes Towing, Rental and Roadside Assistance Comprehensive mechanical & electrical breakdown coverage
<p>GAP</p>  In The Event Of A Total Loss, Gap Pays The Difference Between The Loan Payoff And What Your Insurance Deems Replacement Value	<p>GAP</p>  In The Event Of A Total Loss, Gap Pays The Difference Between The Loan Payoff And What Your Insurance Deems Replacement Value
<p>Maintenance</p>  Ensures proper maintenance on your vehicle and offers convenience and exceptional value Prepays your vehicle's service visits to ensure proper maintenance	<p>Maintenance</p>  Ensures proper maintenance on your vehicle and offers convenience and exceptional value Prepays your vehicle's service visits to ensure proper maintenance
<p>Dent & Ding</p>  Covers dents and dings on your vehicle's exterior surfaces	<p>Dent & Ding</p>  Covers dents and dings on your vehicle's exterior surfaces
<p>Windshield Protection</p>  Films Block Heat and UV Rays. Keep the vehicle cool and reduce glare from other vehicles.	<p>Term 60 Interest Rate 7.99 Payment \$684.78</p>
<p>Appearance Product</p>  Keep your Car looking NEW and SHINY with this amazing product. Maintains resale value and appearance	<p style="text-align: center;">OTHER PRODUCT OPTIONS</p> <p>Windshield Protection \$4.01 Monthly</p>
<p>Key Replacement</p>  Comprehensive mechanical & electrical breakdown coverage	<p> Films Block Heat and UV Rays. Keep the vehicle cool and reduce glare from other vehicles.</p> <p>Appearance Product \$8.03 Monthly</p>
<p>Theft</p>  Reduces Odds of Theft & Increases Odds of Theft Recovery; Keeps Personal Belongings Safer	<p> Keep your Car looking NEW and SHINY with this amazing product. Maintains resale value and appearance</p> <p>Key Replacement \$6.02 Monthly</p>
<p>Term 60 Interest Rate 7.99 Payment \$710.88</p>	<p> Comprehensive mechanical & electrical breakdown coverage</p> <p>Theft \$8.03 Monthly</p>
	<p> Reduces Odds of Theft & Increases Odds of Theft Recovery; Keeps Personal Belongings Safer</p>

X _____

X _____

I understand this is not a contract or offer to purchase. It is a description of the optional products that are available to purchase and the estimated monthly payment for each choice. I understand I must qualify to obtain financing and the payment may vary based on my credit. The base payment on 60 months is \$598.29 on an interest rate of 7.99. The finance charges, amount financed, total of payments, and total of payments including the down payment will be disclosed on my actual finance contract. The dealer makes no warranties, whether expressed or implied.

Product Disclosure Tab: How to Adjust the Product Disclosure

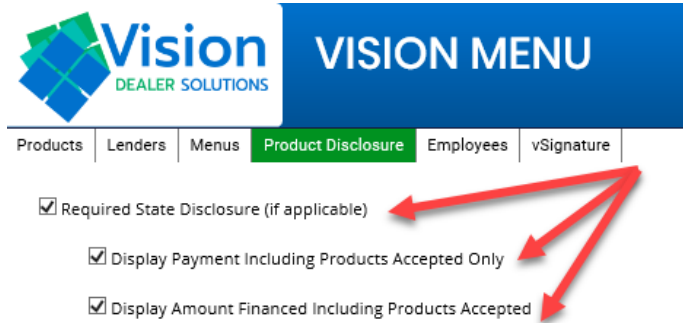


VISION MENU

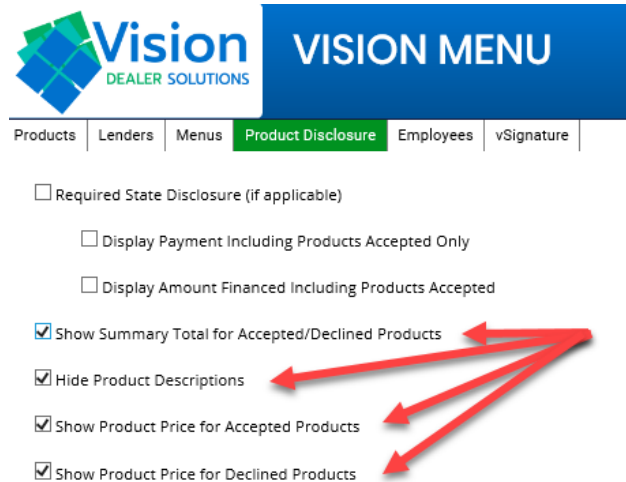
- Products
- Lenders
- Menus
- Product Disclosure**
- F&I Analyzer Goals
- Employees
- vSignature
- Interview
- Vision Touch

Product Disclosure

These check boxes will affect the bottom of the Product Disclosure.



These check boxes will affect product displays inside the accept /declined area.



These check boxes will affect product pricing for accepted and declined.

Accepted Products

- Show Daily Payment
- Show Monthly Payment

Declined Products

- Show Daily Payment
- Show Monthly Payment

Refresh Preview

User the preview to see a PDF of the product disclosure.
Use the refresh button before clicking the preview to see the most updated changes.

Product Disclosure Example

OPTIONAL PRODUCT DISCLOSURE VisionMenu Automotive





test test

1J9-SILVER 2019 Toyota Highlander
VIN: 5TDBZRFH7KS712621

Sale Price: \$34,574.39 Sales Tax: \$2,247.34 Rebate: \$0.00 Cash Down: \$511.80 Trade Allowance: \$0.00 Payoff: \$0.00
Doc Fee: \$850.00 Other Fees: \$125.00 Base Payment (72 months, 4.15% Interest Rate): \$582.74 Total Amount Due: \$37,084.93

Product choices are available to all qualified customers in connection with the purchase/lease of a vehicle. For complete product details, please refer to the corresponding product contract.

You are not required to purchase any of the optional products identified below to obtain financing.

Products Accepted	Products Declined
VSC	\$800.00 Tire & Wheel \$0.37 / day
 <p>Pays 100% of covered Labor and Parts. Includes Towing, Rental and Roadside Assistance Comprehensive mechanical & electrical breakdown coverage</p>	 <p>Protection from all road hazards. Repair or replace all tires and wheels and charges associated with the repair or replacement.</p>
GAP	\$593.00 KEYWise - KWMC FF100 - Luxury 60 mo. / 999,999 miles \$0.27 / day
 <p>Picks up where the insurance company leaves off In the event your vehicle is totaled or stolen and unrecovered, GAP pays the difference of your payoff and the insurance</p>	 <p>Comprehensive mechanical & electrical breakdown coverage</p>

Installation Payment Including Products Accepted - 72 months @ \$618.57 per month
Amount Financed Including Products Accepted - \$39,364.93

X _____
Purchaser's Signature

X _____
Co-purchaser's Signature

X _____
Dealer Rep.

X _____
Date

Wednesday, March 11, 2020 11:13 AM

F&I Analyzer Goals Tab: How to Adjust Report Goals



VISION MENU

- Products
- Lenders
- Menus
- Product Disclosure
- F&I Analyzer Goals**
- Employees
- vSignature
- Interview
- Vision Touch

F&I Analyzer Goals

F&I Manager

- Dealership
- Dealership**
- F&I Manager, Unmapped
- Hendrix (F&I), Brian
- Johnson, Jace

Copy Goals

Copy goals from Benjamin Barber

- Greg Evans
- Michael Neman

Note: save changes before doing this.

Copy Goals

You can setup goals for the dealership as well as the individual F&I managers on this tab.

When setting up individual F&I manager goals you can simple copy goals from another F&I manager and then adjust from there.

Types of Index Calculations

<input checked="" type="checkbox"/> Unit Index	Total Products Sold / TQR (Total Qualified Retail)
<input checked="" type="checkbox"/> Reserve Index	Add total product penetrations percentages.
<input checked="" type="checkbox"/> Include Reserve in Index Calculations	<input checked="" type="checkbox"/> Reserve Index
	Add total product penetrations percentages + Reserve penetration.

Total
<input type="text" value="1,500.00"/>

Save Changes

To add or Edit goals, just type into the fields.

Important! Be sure to save any changes.

Employees Tab: How to Add / Adjust Employees



VISION MENU

Products | Lenders | Menus | Product Disclosure | F&I Analyzer Goals | **Employees** | vSignature | Interview | Vision Touch

Employees



Products | Lenders | Menus | Product Disclosure | **Employees** | vSignature

EMPLOYEE NAME	G-L
Bernardo	
Chad Weston	
Chad Weston	
Chris	
Chris Einterz	
Daniel	
Daniel Smith	
Deal House	
Derrick Hobson	
Djessie Goines	
Eddie Anderson	
Ella	
Fernando	

Add

At the bottom of the list of names you can click the Add button.

To add an employee, please enter the First and Last name of the new employee.

The Abbreviated name is for displaying on reports.

DMS ID is for SSO users that have a pass-thru into the menu system. *(Don't enter anything if you are not using a pass-thru SSO access.)*

You can only select one position at a time, so if an employee need to be listed under multiple positions they will need multiple employees created.

Important! You must hit Submit to create the employee.

Greg Owens

Reports DMS ID: 126350

First Name:

Last Name:

Abbreviated Name:

Position: ▼

Active Employee If this is unchecked, the employee will not appear in dropdown lists throughout the program.

Default Employee

Only default if deal date is before

When adjusting Employees you can edit their names and position.

You can also make them inactive if they are no longer with the store.

Default employee for that position for reporting.

You can have the default employee adjusted by the date of deals in the past.

Save

Important! You must hit Save.

vSignature Tab: How to Emails and Setup the eSign



VISION MENU

Products | Lenders | Menus | Product Disclosure | F&I Analyzer Goals | Employees | **vSignature** | Interview | Vision Touch

vSignature

Dealership Settings

Notification Emails

Email Address +

Other Settings

Enable Tap To Sign

Custom Document Emails

Write the email subject here (Max 50 characters) +

Write the body of the email here

We Appreciate Your Business! ✖

If you have any Questions please let us know!

Best Regards,
Max Troyer

Save

Sign Tablet

DO NOT UNCHECK

Enable Tap To Sign

Use this to add an email to be automatically CC'd on every deal.

Note: This will be automatic for any email sent from the vSignature system.

Custom Emails can be added here. The email will automatically include the Password for the customer.

The email is a Text email only.

Press the Green Plus button to add.

Important! You must click save after hitting the Green Plus sign.

To setup your digital e-Signature you will need to login to your tablet or touch screen device. Go to VisionMenu.com on your mobile device and then go through the F&I by Design link.

Once you see "Waiting for Dealer" Click Sign Tablet here.

Keep clicking Sign Tablet until satisfied with your signature.

Then hit accept on the tablet.

Sign Tablet

Please call 260-755-3224 or email support@visionmenu.com for help to setup the signatures

Interview Tab: Add and Adjust Interview Questions



VISION MENU

Products | Lenders | Menus | Product Disclosure | F&I Analyzer Goals | Employees | vSignature | **Interview** | Vision Touch

Interview

The screenshot shows the "Interview Setup" interface. It has a blue header with the title "Interview Setup". Below the header is a section titled "Questions". There are five question entries, each with a text input field, a "Multiple Choice" checkbox, and a "Manage Choices" button. The questions are:

- How many miles do you typically drive in a year? (Multiple Choice checked)
- How long do you plan on keeping this vehicle? (Multiple Choice checked)
- On a scale of 1-5, how would you rate your experience with us today? (Multiple Choice checked)
- On a scale of 1-5, how likely would you be to recommend us to a friend? (Multiple Choice checked)
- Is there anything we can do to make your experience better today? (Multiple Choice unchecked)

Each question entry has a red "X" icon for deletion and up/down arrows for reordering. At the bottom of the list is a green "+" icon for adding a new question. A "Save" button is located at the bottom left of the form.

This tab is for setting up the customer interview on the Vision Touch platform. You can add as many questions as you would like as well as make questions multiple choice.

When you add a new one just click the Green Plus sign.

Use the arrows to change the order.

Save

Important! You must hit Save.

Vision Touch Tab: Deciding whether to use Pictures or Icons on Menu



VISION MENU

Products | Lenders | Menus | Product Disclosure | F&I Analyzer Goals | Employees | vSignature | Interview | **Vision Touch**

Vision Touch

By checking the check box, any dealership that has Vision Touch will now see pictures on the menu's instead of Icons



VISION MENU

Products | Lenders | Menus | Product Disclosure | F&I Analyzer Goals | Employees | vSignature | Interview | **Vision Touch**

User Touch Setup

Use Pictures on touch menu instead of icons.

Save



Software User Guide

Menu Process

This user guide breaks down the deal process on the desktop to print menus, disclosures, and your product forms.

Steps for your Deal Process

Step 1:	Step 2:	Step 3:	Step 4:
Pull Deal and Deal Review	vRate / Build the Deal	Print Menu and Menu Adjustments	vContract



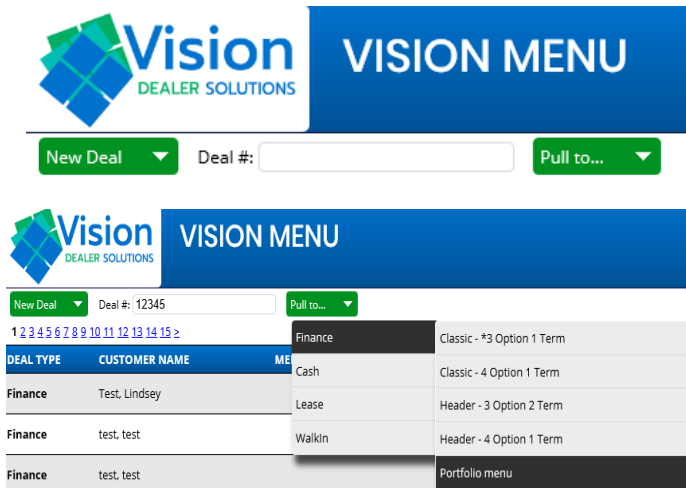
VisionMenu is our desktop version which includes vRating and vContracting.

Browsers: All

Step 1: Pull Deal and Deal Review (Desktop)

Step 1:	Step 2:	Step 3:	Step 4:
Pull Deal and Deal Review	vRate / Build the Deal	Print Menu and Menu Adjustments	vContract

Pull Deal



The screenshot shows the 'VISION MENU' interface. At the top, there's a search bar with 'Deal #' and a 'Pull to...' dropdown. Below it, a table lists menu templates with columns for DEAL TYPE, CUSTOMER NAME, and MENU. The table includes entries like 'Finance - *3 Option 1 Term', 'Cash - Classic - 4 Option 1 Term', 'Lease - Header - 3 Option 2 Term', 'Walkin - Header - 4 Option 1 Term', and 'Portfolio menu'.

Type deal # into blank and select "Pull To", revealing your menu template library.

Menu Templates are presets that control product mix and customizations. You can setup as many as you want —the options are unlimited!

***Helpful Hint* Please call or email Support to assist or make adjustments.**

Review Deal Info

Deal Info

Buyer

CoBuyer

Vehicle

Financial Info

FINANCE DEAL

Sale Price: \$31,700.00

MSRP/NADA Retail: \$34,737.00

Days to 1st: 45

Cash Down: \$2,569.75

Rebate: \$1,500.00

Lender: CASH DEAL: PO BOX 660068, SACRAMENTO

PO BOX 660068 SACRAMENTO

TRADES

New Trade No trades.

FEES

Doc Fee \$5.00

Title Fee \$10.00

TAXES

State Tax 6.50 %

Base Pay Info

Term: 60

Interest: 3.20

Payment Type: Monthly

The Deal Information comes directly from the DMS. All deal data pulled from the DMS may be edited during the deal process in VisionMenu.

Non-Integrated dealerships will need to type in the information.

Any changes made to the term, to the interest rate, and to the products in the far left column will automatically fill each column to the right. You may simply click Tab, or click out of the retail box.

For all other columns the term, interest rate, and products can be updated independent.

****Important**** Must hit save changes before vRating. Also, at any point during the deal process you can make changes on the desktop which sync to the tablet. You just need to hit save changes and then refresh the tablet to update the deal on the tablet.

Full Screen View of the Deal Work Screen

[Change Deal](#) | [New Deal](#) | [Red Flags](#) | [OFAC Check](#)

[View XML](#) | [Save Changes](#) | [vSign Disclosure](#) | [vSign Menu](#) | [vSignature](#) | [Close and Review](#)

[Dashboard](#) | [Deal Ledger](#) | [Reports](#) | [Setup](#) | [Admin](#) | [Log Out](#)

Buyer

CoBuyer

Vehicle

Buyer First: <input type="text" value="Brandenberger"/>	Last Name: <input type="text" value="Test"/>	Deal Number: <input type="text" value="73809"/>	
Address 1: <input type="text" value="737 Bassitt Rd"/>	City: <input type="text" value="Elizabethtown"/>	State: <input type="text" value="IL"/>	
Zip: <input type="text" value="62931"/>	Phone: <input type="text" value="(618) 313-0498"/>		
E-mail: <input type="text"/>	Birthdate: <input type="text" value="04"/> / <input type="text" value="04"/> / <input type="text" value="53"/>	Gender: <input type="text"/>	

FINANCE DEAL

State:

Sale Price: \$56,975.00

MSRP/NADA Retail: \$61,159.00

Days to 1st: 30

Cash Down: \$1,692.07

Rebate: \$3,500.00

Desk Quote: \$0.00

Accessories: \$0.00

Lender:

POB 105704 ATLANTA

TRADES

Allowance: Payoff: ACV:

[New Trade](#)

FEES

Doc Fee: \$179.81

License Fee: \$25.00

CLASSIC - 4 OPTION 1 TERM

		Option 1	Option 2	Option 3	Option 4
vRate	vContract				
Term		<input type="text" value="60"/>	<input type="text" value="60"/>	<input type="text" value="60"/>	<input type="text" value="60"/>
Interest		<input type="text" value="7.79"/>	<input type="text" value="7.79"/>	<input type="text" value="7.79"/>	<input type="text" value="7.79"/>
Payment Type		<input type="text" value="Monthly"/>	<input type="text" value="Monthly"/>	<input type="text" value="Monthly"/>	<input type="text" value="Monthly"/>
		COMPLETE - New	COMPLETE - New	COMPLETE - New	COMPLETE - New
		120 mo. / 70,000 miles	120 mo. / 70,000 miles	120 mo. / 70,000 miles	120 mo. / 70,000 miles
-Protective VSC	<input checked="" type="checkbox"/>	\$100.00 Disappearing Deductible	\$100.00 Disappearing Deductible	\$100.00 Disappearing Deductible	\$100.00 Disappearing Deductible
		\$2,159.00	\$2,159.00	\$2,159.00	\$2,159.00
		TITANIUM - STANDARD AUTO COMPLETE W/ KEY	TITANIUM - STANDARD AUTO COMPLETE W/ KEY	TITANIUM - STANDARD AUTO COMPLETE W/ KEY	
-Titanium Protection	<input checked="" type="checkbox"/>	84 mo.	84 mo.	84 mo.	DECLINED
		\$750.00	\$750.00	\$750.00	
		NAC Theft Deterrent \$5000 Benefit			
-Theft Protection	<input checked="" type="checkbox"/>	60 mo. / 999,999 miles	DECLINED	DECLINED	DECLINED
		\$45.00			
		Base Payment: \$714.05	\$714.05	\$714.05	\$714.05
		Amount Financed: \$38,397.49	\$38,352.49	\$38,352.49	\$37,549.99
		Payment: \$774.71	\$773.80	\$773.80	\$757.61

Step 2: vRate and Build the Deal (Desktop)

Step 1:	Step 2:	Step 3:	Step 4:
Pull Deal and Deal Review	vRate / Build the Deal	Print Menu and Menu Adjustments	vContract

vRate the Products

<div style="text-align: center; background-color: #0070c0; color: white; padding: 5px; margin-bottom: 10px;">vRate</div> <p>Step One: Click vRate. If you don't see vRate, you just need to hit one of the calculate buttons, or just hit save changes.</p> <div style="text-align: center; border: 1px solid #ccc; padding: 5px; width: fit-content; margin: 0 auto;">Calculate</div>	<div style="text-align: center; background-color: #0070c0; color: white; padding: 5px; margin-bottom: 10px;">vRate® Step 2 - Select Products</div> <p style="color: red; font-weight: bold; font-size: small;">Check only the products that you want to rate:</p> <p>Step Two: Select or de-select the products you would like to bring in the rates. Click Continue.</p> <p style="color: red; font-weight: bold; font-size: small;">*WARNING* Re-rating products that have enrolled contracts associated with them can cause loss of ability to view contract PDF in VisionMenu. The contract will also still be active on the provider's side.</p>	<div style="text-align: center; background-color: #0070c0; color: white; padding: 5px; margin-bottom: 10px;">vRate® Step 3 - Select Surcharges</div> <p>Step Three: Please select any optional surcharges that apply that are not VIN-decoded from the provider.</p> <p style="text-align: center;">Click Continue.</p>
---	---	--

Build the deal.

Start from the first column because all changes carry across to the other columns.

Each of these white boxes are drop downs that expand when clicked.

Vehicle Value Care+Plus - New

120 mo. / 70,000 miles

\$0.00 Deductible

\$2,096.00

- Product Plans
- Months / Miles
- Deductible
- Retail

Vehicle Service Contract

Properties

Delete

To see the cost: Each product name on the left will have a drop-down when you click the name. Use Properties to see cost.

You can also delete products off the menu here.

Save Changes and Open Deal from the Tablet

The tablet syncs to the desktop, so anything you change and save on the desktop will then be shown on the tablet after a quick tablet refresh or be there when you login.

Full Screen View of Steps 1-3 of the vRating Process

Step 1

Change Deal | New Deal | Red Flags | OFAC Check | Save Changes | vSign Disclosure | vSign Menu | vSignature | Close and Review

Buyer: Buyer First: [] Last Name: [] Deal Number: []
 CoBuyer: Address 1: [] City: [] State: []
 Vehicle: Zip: [] Phone: []
 E-mail: [] Birthdate: MM / DD / YY Gender: []

FINANCE DEAL	CLASSIC - 3 OPTION 1 TERM		
	Option 1	Option 2	Option 3
State: Indiana	vRate		
Sale Price: \$0.00	Term: 60	60	60
MSRP/NADA Retail:	Interest: 3.50	3.50	3.50
Days to 1st: 0	Payment Type: Monthly	Monthly	Monthly
Cash Down: \$0.00	-Protective VSC <input checked="" type="checkbox"/>	\$1,500.00 <input checked="" type="checkbox"/>	\$1,500.00 <input checked="" type="checkbox"/>
Rebate: \$0.00	Port GAP <input checked="" type="checkbox"/>	\$695.00 <input checked="" type="checkbox"/>	\$695.00 <input type="checkbox"/> DECLINED
Desk Quote: \$0.00	-Tire & Wheel <input checked="" type="checkbox"/>	\$595.00 <input checked="" type="checkbox"/>	\$595.00 <input type="checkbox"/> DECLINED
Accessories: \$0.00	-Windshield Protection <input checked="" type="checkbox"/>	\$0.00 <input type="checkbox"/>	DECLINED <input type="checkbox"/> DECLINED
Lender: Select...	-Key Replacement <input checked="" type="checkbox"/>	\$599.00 <input type="checkbox"/>	DECLINED <input type="checkbox"/> DECLINED
	Base Payment: \$0.00	\$0.00	\$0.00
	Amount Financed: \$3,389.00	\$2,790.00	\$1,500.00
	Payment: \$61.47	\$50.61	\$27.21

Step 2

vRate® Step 2 - Select Products

Check only the products that you want to rate:

-Protective VSC **Protective - Advantage**

-Titanium Protection **NSD**

-Theft Protection **National Auto Care**

Cancel Continue

Step 3

vRate® Step 3 - Select Surcharges

-Protective VSC **Protective - Advantage**

Protective's Vehicle Protection Plan

Air Conditioning

Business Use

Conversion Package

Mobility Equipment

Snow Plow

Protective's Auto Care Plan

Electronics

HI-TECH

SEALS AND GASKETS

-Titanium Protection **NSD**

-Theft Protection **National Auto Care**

Cancel Continue

Step 3: Product Presentation and Menu Close

Step 1:	Step 2:	Step 3:	Step 4:
Pull Deal and Deal Review	vRate / Build the Deal	Print Menu and Menu Adjustments	vContract

Save Changes

Use these buttons to save the deal and to calculate your payments.

Calculate

Print Menu

To Print forms, in the top right, you can print a menu or disclosure at anytime. This will generate a PDF for you to review and print.

Print Disclosure ▼

- All Declined
- Option 1
- Option 2
- Option 3

Edit Fees

Edit Fees will allow you to mark a fee as Taxable on the fly. Plus you can chose to apply it to this deal or not. Plus you can update the Fee amount.

New Trade

You can add as many trades as the deal requires. You can also adsut the amounts of the Allowance, Payoff, and ACV. Use this button if you wish to add more information to the about the trade. The red "X" deletes the trade out.

OFAC Check

You can run an OFAC check at anytime by clicking this button. Buyer and co-buyers are run through at the same time.

LENDER CAPS

Enable Lender Cap

Cap: ▼

Payment:

Payment

Price/NADA Retail Amount Financed

+

Use the Change Order button on the far right.

Use the Add Product button on the far right.

You can use the lender cap feature to show the additional cash down needed for each column.

Full Screen View of Menu Buttons

VISION MENU

Hello, Derek Walker
Return to Derek Walker

Dashboard Deal Ledger Reports Setup Log Out

Change Deal New Deal Red Flags OFAC Check Save Changes vSign Disclosure Print Menu Close and Review

Buyer Date Sold: 3/11/2020 New Year: 2020 Make: Hyundai Model: Elantra

CoBuyer Odom.: 21 Color: FLUID METAL VIN: KMH084LF4LU935323

Vehicle Stock#: TNH23 In-Service:

FINANCE DEAL

State: Indiana

Sale Price: \$20,208.15

MSRP/NADA Retail: \$20,755.00

Days to 1st: 42

Cash Down: \$300.00

Rebate: \$500.00

Desk Quote: \$0.00

Accessories: \$0.00

Lender: HYUNDAI MOTOR FINANCE: POB 105299 ATLANTA

POB 105299 ATLANTA

TRADES

Allowance Payoff ACV

\$2,700.00 \$0.00 \$2,700.00

FEES

Doc Fee \$179.81

License Fee \$101.00

TAXES

State Tax 7.00 %

Accessories 6.25 %

CLASSIC - 4 OPTION 1 TERM

	Option 1	Option 2	Option 3	Option 4
Term	0	0	0	0
Interest:	0.00	0.00	0.00	0.00
Payment Type:	Monthly	Monthly	Monthly	Monthly
COMPLETE - New	120 mo. / 70,000 miles			
-Protective VSC	\$100.00 Disappearing Deductible	DECLINED	DECLINED	DECLINED
Port GAP	\$0.00	DECLINED	DECLINED	DECLINED
Titanium Protection	TITANIUM - STANDARD AUTO COMPLETE W/ KEY	DECLINED	DECLINED	DECLINED
	84 mo.			
-Theft Protection	NAC Theft Deterrent \$5000 Benefit	DECLINED	DECLINED	DECLINED
	60 mo. / 999,999 miles			
Base Payment:	\$0.00	\$0.00	\$0.00	\$0.00
Amount Financed:	\$20,600.53	\$18,214.53	\$18,214.53	\$18,214.53
Payment:	\$0.00	\$0.00	\$0.00	\$0.00

The red arrow is pointing to where you add a product or re-arrange product order

VISION MENU

Hello, Derek Walker
Return to Derek Walker

Dashboard Deal Ledger Reports Setup Log Out

Change Deal New Deal Red Flags OFAC Check Save Changes vSign Disclosure Print Menu Close and Review

Buyer Date Sold: 3/11/2020 New Year: 2020 Make: Hyundai Model: Elantra

CoBuyer Odom.: 21 Color: FLUID METAL VIN: KMH084LF4LU935323

Vehicle Stock#: TNH23 In-Service:

FINANCE DEAL

State: Indiana

Sale Price: \$20,208.15

MSRP/NADA Retail: \$20,755.00

Days to 1st: 42

Cash Down: \$300.00

Rebate: \$500.00

Desk Quote: \$0.00

Accessories: \$0.00

Lender: HYUNDAI MOTOR FINANCE: POB 105299 ATLANTA

POB 105299 ATLANTA

TRADES

Allowance Payoff ACV

\$2,700.00 \$0.00 \$2,700.00

FEES

Doc Fee \$179.81

License Fee \$101.00

TAXES

State Tax 7.00 %

Accessories 6.25 %


CLASSIC - 4 OPTION 1 TERM

	Option 1	Option 2	Option 3	Option 4
Term	0	0	0	0
Interest:	0.00	0.00	0.00	0.00
Payment Type:	Monthly	Monthly	Monthly	Monthly
COMPLETE - New	120 mo. / 70,000 miles			
-Protective VSC	\$100.00 Disappearing Deductible	DECLINED	DECLINED	DECLINED
Port GAP	\$0.00	DECLINED	DECLINED	DECLINED
Titanium Protection	TITANIUM - STANDARD AUTO COMPLETE W/ KEY	DECLINED	DECLINED	DECLINED
	84 mo.			
-Theft Protection	NAC Theft Deterrent \$5000 Benefit	DECLINED	DECLINED	DECLINED
	60 mo. / 999,999 miles			
Base Payment:	\$0.00	\$0.00	\$0.00	\$0.00
Amount Financed:	\$20,600.53	\$18,214.53	\$18,214.53	\$18,214.53
Payment:	\$0.00	\$0.00	\$0.00	\$0.00

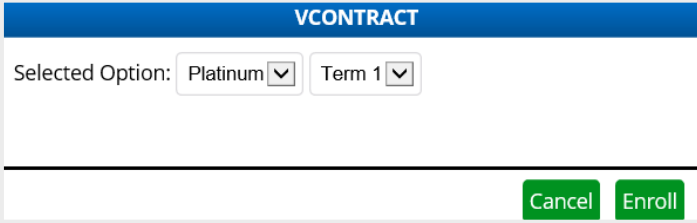
VisionClassic Step Five: Disclosure and vContract

Step 1:	Step 2:	Step 3:	Step 4:
Pull Deal and Deal Review	vRate / Build the Deal	Print Menu and Menu Adjustments	vContract

vContract: Enroll your Product Forms




Step One: Click vContract. Payments must be calculated to see the vContract button.




Step Two: Enroll the payment by selecting which product package / column and term. Then Click Enroll. This will take you to the vContracting screen.

Don't Double Click



Step Three: Enroll each product one at a time. Each provider may require more information. Please read pop up messages.

Enroll Product Forms & Re-Contracting



If you click View, you will only be able to view that PDF.

To Re-Contract

1. Click Void button
2. Re-Rate for that product (s) only.

3. Select Plan Options & Retail in the proper Product Option / Column.
4. Click vContract and then enroll the form.

Full Screen View of where the vContract Button is located

The screenshot shows the 'VISION MENU' interface. At the top, there's a navigation bar with 'VISION MENU' and user information 'Hello, Derek Walker Return to Derek Walker'. Below this are tabs for 'Dashboard', 'Deal Ledger', 'Reports', 'Setup', and 'Log Out'. A secondary bar contains 'Change Deal', 'New Deal', 'Red Flags', 'OFAC Check', 'Save Changes', 'vSign Disclosure', 'Print Menu', and 'Close and Review'. The main area is divided into sections: 'FINANCE DEAL' on the left, 'CLASSIC - 4 OPTION 1 TERM' in the center, and 'TRADES', 'FEES', and 'TAXES' on the bottom left. A red arrow points to the 'vContract' button in the 'CLASSIC' section.

By Clicking Enroll, the Contract can then be Viewed by clicking on the "View" button

This screenshot shows the 'VISION MENU' interface with a form for buyer information and a table of products. The 'Buyer' section includes fields for Buyer First, Address 1, Zip, E-mail, Last Name, City, Phone, Birthdate, Deal Number, State, and Gender. Below this is a table with columns for 'PRODUCTS', 'VCONTRACT', and 'EMPLOYEES'. A red arrow points to the 'View' button in the 'VCONTRACT' column for the 'Titanium Protection' product.

PRODUCTS	Price	Cost	Profit	Qual.	Provider	Status	Add Product	Class Code	EMPLOYEES
-Protective VSC:	\$1,592.00	\$592.00	\$1,000.00	✓	Protective - Advantage	Enroll		03	Salesperson 1: Select...
Port GAP:	\$0.00	\$398.00	(\$398.00)	✓	Portfolio 2.0				Salesperson 2: Select...
-Titanium Protection:	\$700.00	\$700.00	\$0.00	✓	NSD	Enroll	DA10955282	THD	Salesperson 3: Select...
-Theft Protection:	\$45.00	\$45.00	\$0.00	✓	National Auto Care	Enroll			Sales Manager: Select...