EASY FIN

EASY-FIN Basic Instruction Manual Contents

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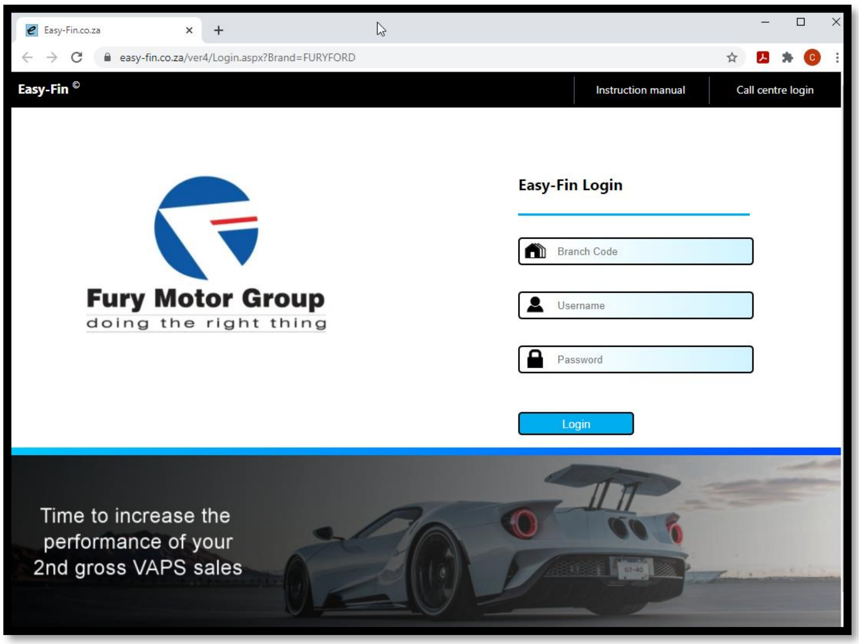
EASY FIN

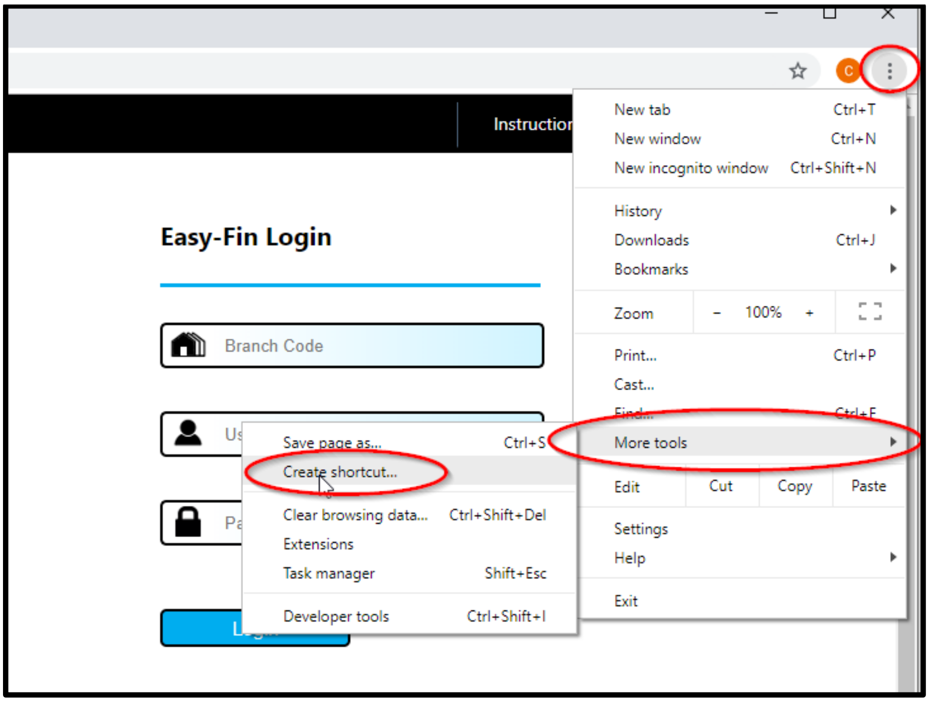
Creating an Icon on your Desktop

Before proceeding with the below instructions please ensure that your Google Chrome web browser is updated to the latest version.

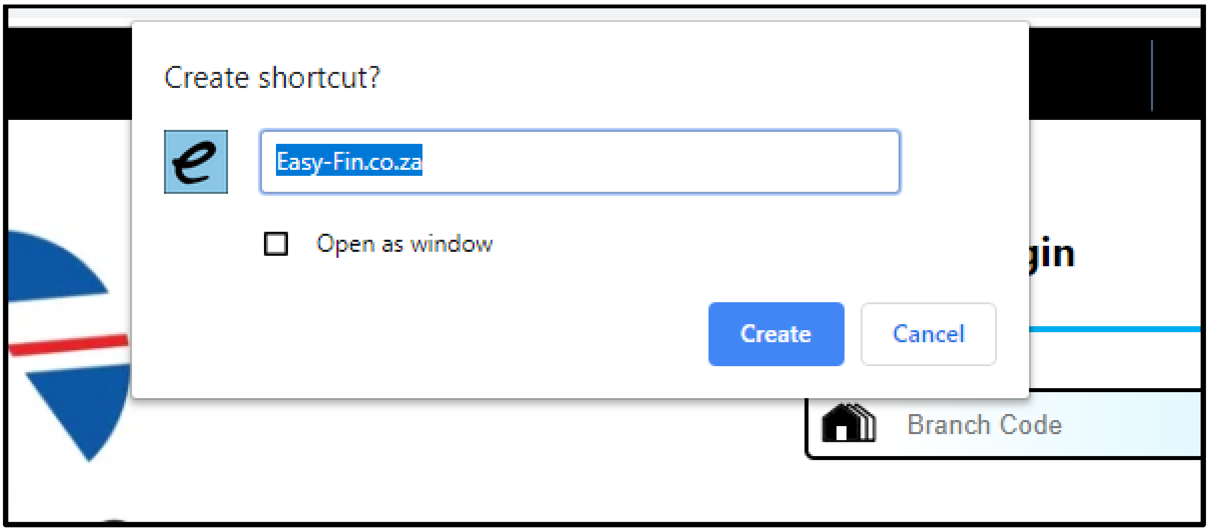
In order to create an icon for Easy-Fin on your desktop you will first need to navigate to the EasyFin website by going to https://www.easy-fin.co.za/furyford/ in your Google Chrome web browser, and you should see a page like this.



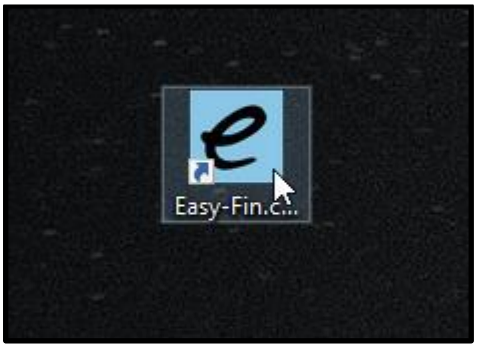
Once you have navigated to the above page you will click to open the **browser preferences (three dots)** in the top right-hand side of the window. Then click on '**More tools**', then '**Create shortcut…**'



Chrome should then pop-up with the below confirmation, you should leave the '**Open as window**' checkbox unticked and click '**Create**'.



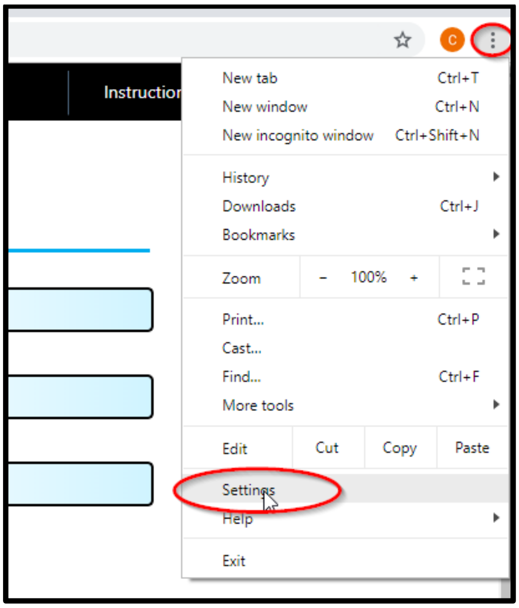
This will create an icon to EasyFin on your desktop which you can double-click to go directly to the EasyFin website.



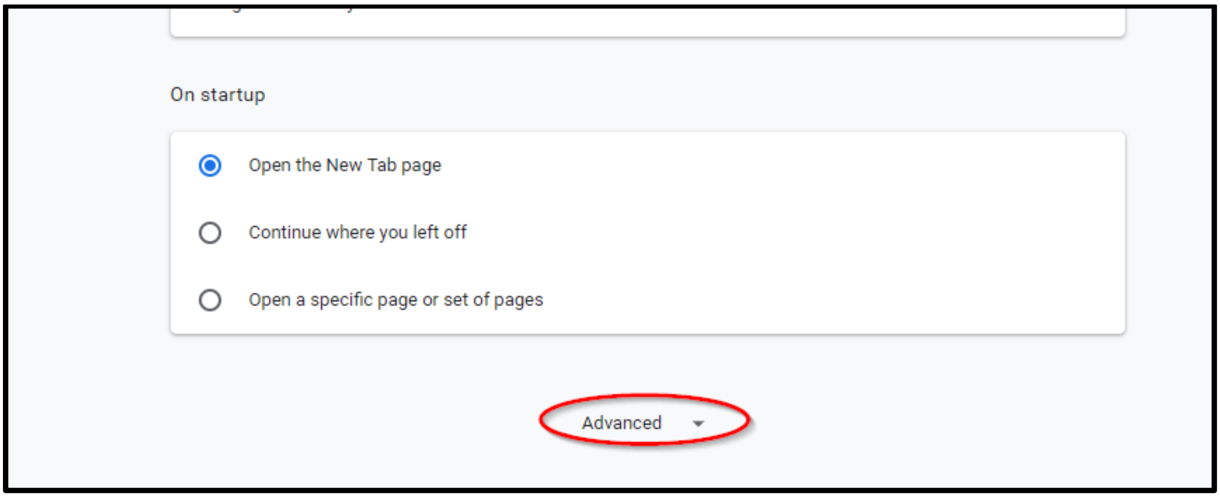
Enabling Easy-Fin on your Google Chrome pop-up blocker

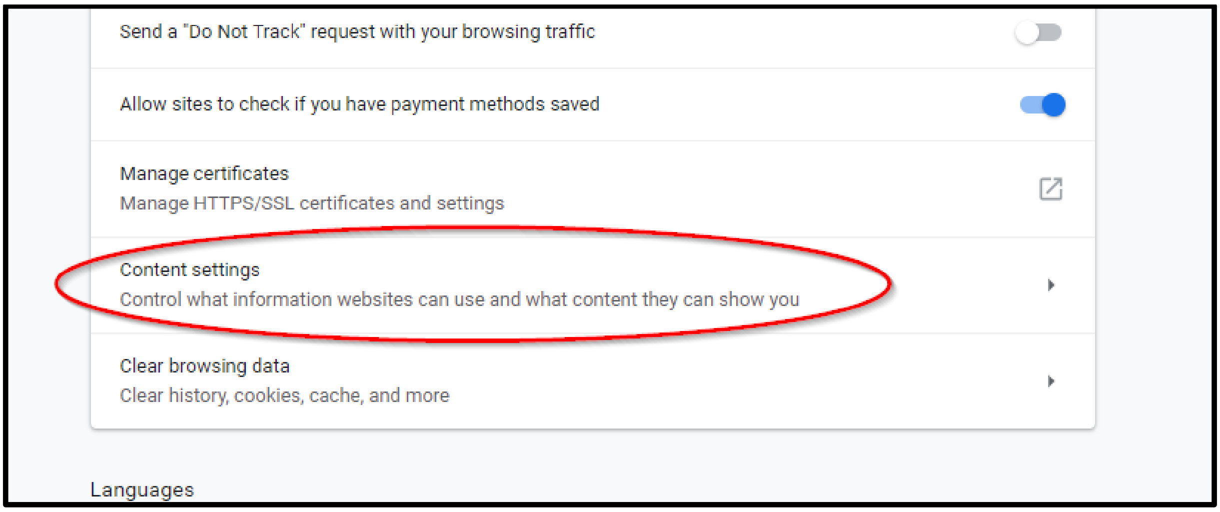
There are certain processes within EasyFin that open in a new tab/window for convenience, however Google Chrome will block these tabs by default. You will need to disable the pop-up blocker for the EasyFin website in order to utilise the program fully.

Click on the **browser preferences** button and then click on '**Settings**'.

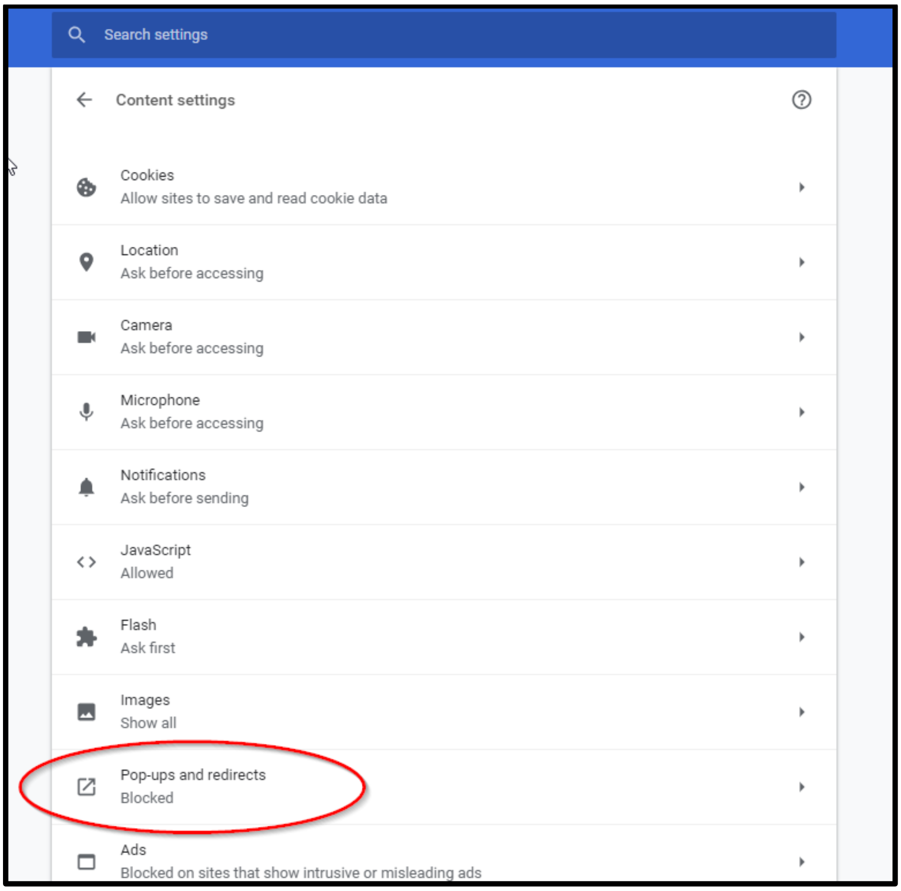


Scroll all the way to the bottom of the settings window and click '**Advanced**', then under the '**Privacy and security**' heading click on '**Content settings**'.

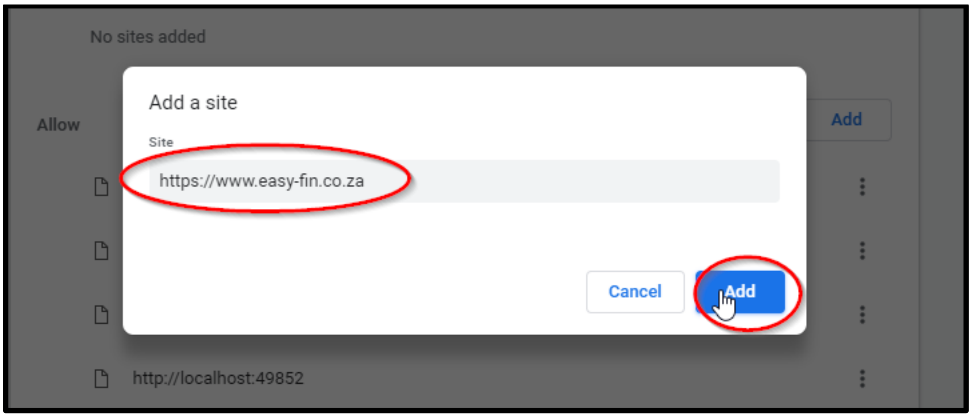




You will then need to click on ‘**Pop-ups and redirects**’ and click the ‘**Add**’ button next to the ‘**Allow**’ heading. Type in https://www.easy-fin.co.za into the text box and click ‘**Add**’.

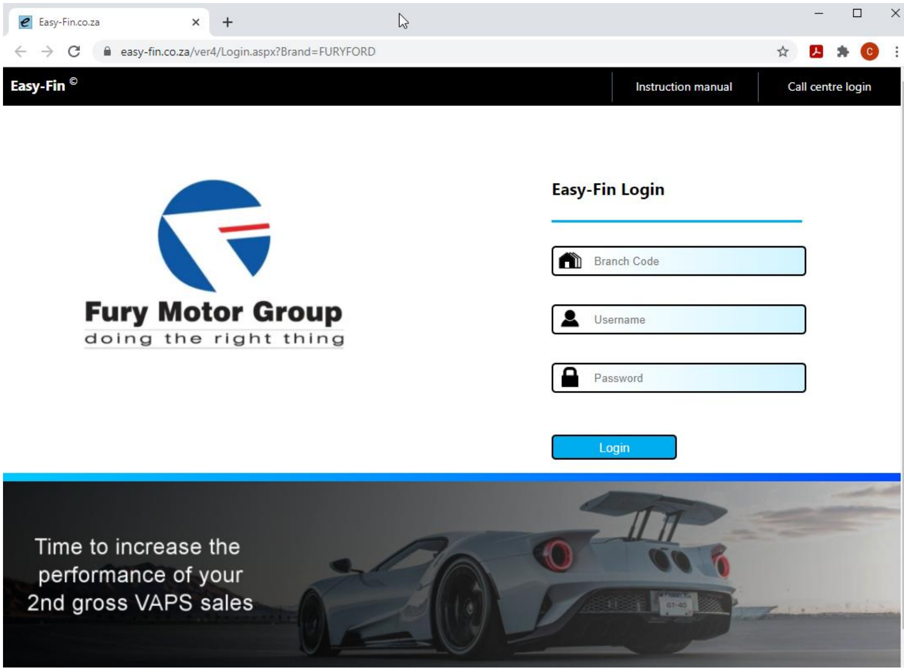



Search settings
Pop-ups and redirects
Blocked (recommended)
Block
Add
No sites added
Allow
Add


No sites added
Allow
Add a site
Site
https://www.easy-fin.co.za
Add
Cancel
Add
http://localhost:49852

How to Log In to EasyFin

To log in to the system you will need to navigate to the EasyFin website by going to https://www.easy-fin.co.za/furyford/ in your Google Chrome web browser, and you should see a page like this.



Please enter your Branch Code, Username and Password provided to you and click the 'Login' button.

If you are new to the dealership and you require login details, please follow the below steps.

1. If there is another F&I already using the EasyFin system at your branch, they will be able to set up a profile for you and provide you with your credentials.

2. If you are part of a group and your Head Office branch administrates your EasyFin products on their own branch, they may be able to assist you by logging in to your branch via the head office control panel and setting up your account.

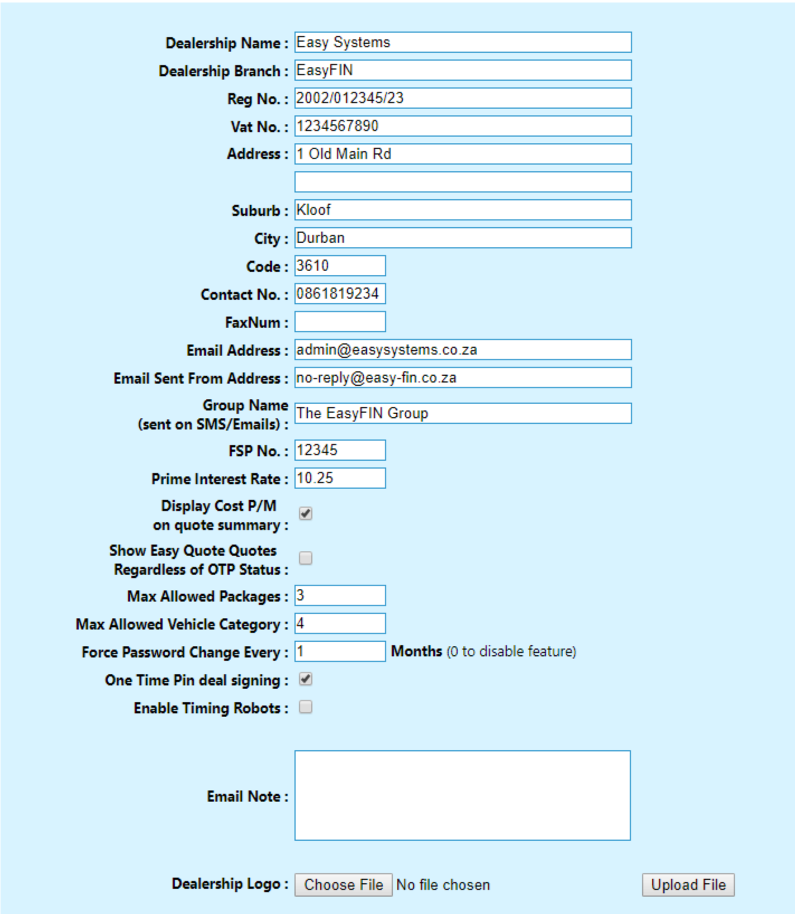
3. You can send an email to EasyFin support at admin@easysystems.co.za requesting credentials, if you are part of a group please include head office in your email so that your request can be authorised.

F&I - Setting up EasyFin – Company Preferences and Staff Details

Before starting to use EasyFin you will need to set up the system settings and preferences, as well as the default packages you will be using in your deals.

If you are part of a group, your head office branch may have already set up some of the sections discussed in the next few pages.

The first step will be to set up your dealership details, please move your mouse over the ‘Admin Menu’ heading and click on the ‘Company Details’ option.



- Email Sent From Address – Any automatic email sent from the system will come from this email address.
- Group Name – This will be used in various emails and SMSs sent from the system, e.g. “Dear Customer Name ,
Congratulations! The EasyFIN Group is thrilled to advise that your Motor Vehicle Finance has been approved and is conditional on the verification of your information.

  We at The EasyFIN Group Financial Services are pleased to present a few installment package options, designed for your individual financial needs and Peace of Mind to help protect your investment.”
- Display Cost P/M of quote summary – shows individual product cost per month on the quote summary page as per below screenshot.

- Show EasyQuote quotes regardless of OTP status – if your dealership uses our EasyQuote software, this option will show all EasyQuote quotes on the home page to convert to EasyFin deals, otherwise only OTPs will show on the home page.

- Max Allowed Packages – Limits the number of packages that can be selected for a deal to this number. We recommend having 3 packages on a deal.

- Max Allowed Vehicle Category – Limits how many Vehicle Categories you can add to the system. If your system is linked to a head office branch then this will be set at head office level.

- Force Password Change Every X Months – Forces the users on the system to change their password every X months, otherwise enter 0 to disable this functionality

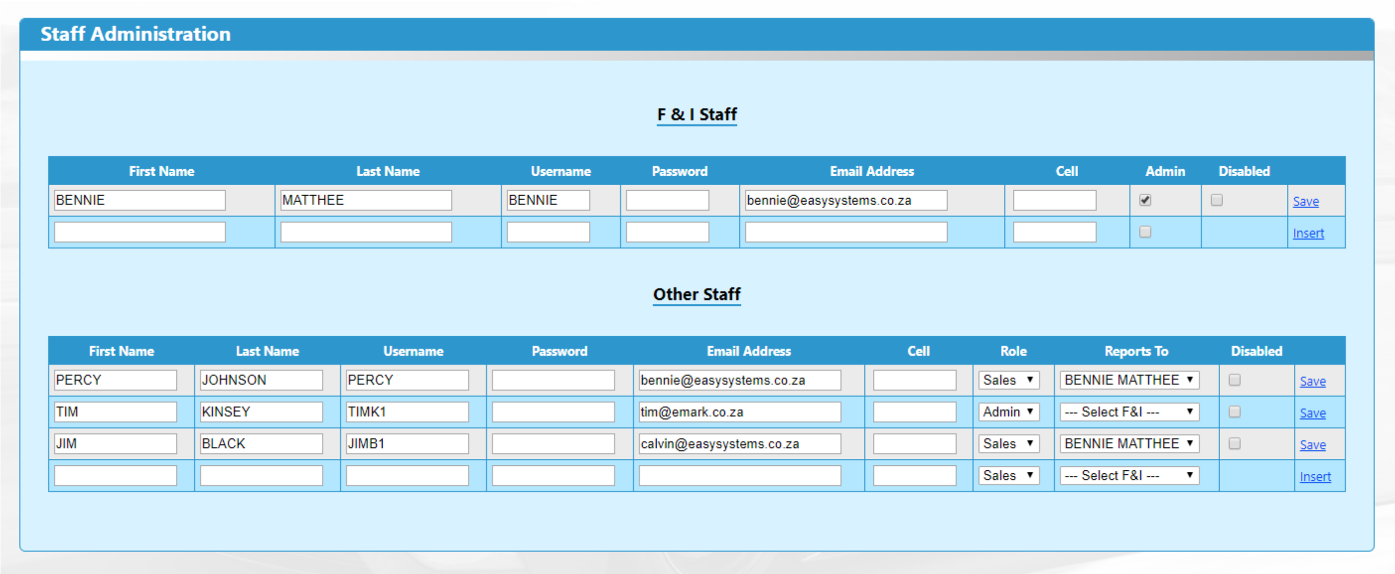
- One Time Pin deal signing – When the deal is sent to the client they will only be able to access the deal using the One Time Pin set to them in conjunction with their ID/Passport number.

- Enable Timing Robots – Enables the robots for each deal to track the amount of time spent on each stage of the deal, also notifies the client and sales executive once each step is completed.

- Email Note – This text is included in the PDF sent to the client with the link to their deal.

- Dealership Logo – The dealership logo can be uploaded here and will be included in any email sent to the client, as well as displayed on the process where the client chooses their package.

Once you have updated these settings please go to 'Admin Menu' and click on 'Staff Admin'.



Staff Administration

F & I Staff

First Name	Last Name	Username	Password	Email Address	Cell	Admin	Disabled	
BENNIE	MATTHEE	BENNIE		bennie@easysystems.co.za		☑	☐	Save
						☐		Insert

Other Staff

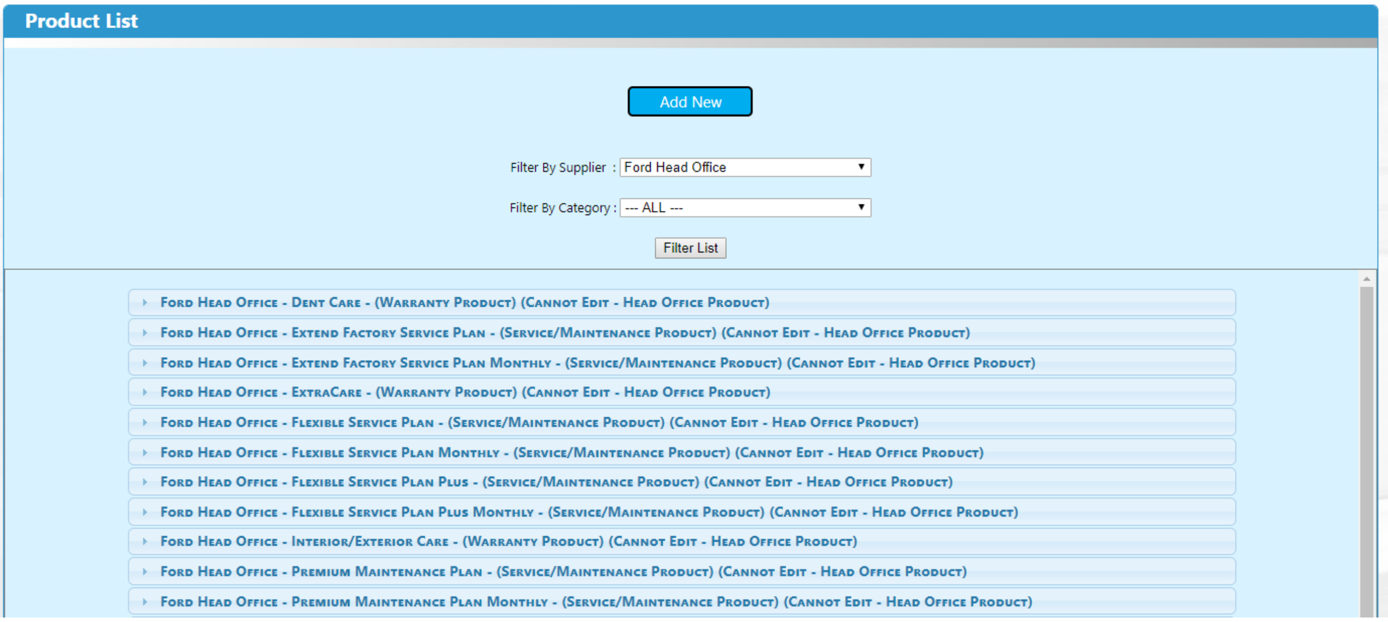
First Name	Last Name	Username	Password	Email Address	Cell	Role	Reports To	Disabled	
PERCY	JOHNSON	PERCY		bennie@easysystems.co.za		Sales	BENNIE MATTHEE	☐	Save
TIM	KINSEY	TIMK1		tim@emark.co.za		Admin	--- Select F&I ---	☐	Save
JIM	BLACK	JIMB1		calvin@easysystems.co.za		Sales	BENNIE MATTHEE	☐	Save
						Sales	--- Select F&I ---		Insert

Please edit the details set up for your F&I account so that they are correct and click the 'Save' link to the right. If there are additional F&I's at your dealership you should enter in each of their details in the empty line at the bottom of the F&I list and click the 'Insert' link on the right.

You will also need to do the same with any sales staff at your dealership, ensuring that the sales executive details are entered will allow them to receive any notification related to their deals and will also allow them to log in and use the EasyFin message centre, delivery request facilities and view the F&I progress on their deals.

F&I - Setting up EasyFin – Setting up products

To see what products are available to you, either loaded by a previous F&I or available from a head office branch should you be linked to one, as well as adding new products to the system, please go to the 'Admin Menu' and click on 'Product List'.



In the screenshot above you can see that in this database there are several products already on the list, these have been captured by Ford Head Office and cannot be edited by a dealership, however the details of the products can be viewed. The list can be filtered by product supplier and by product category to make finding a certain product easier if the list grows too long.

To add your own product, you can click on the 'Add New' button at the top of the page.

A product is made up of 2 levels, the parent product and the product options. For example, the parent product could be 'Netstar', then the product options could be 'Nano', 'Basic', 'Plus' and 'Early Warning'.

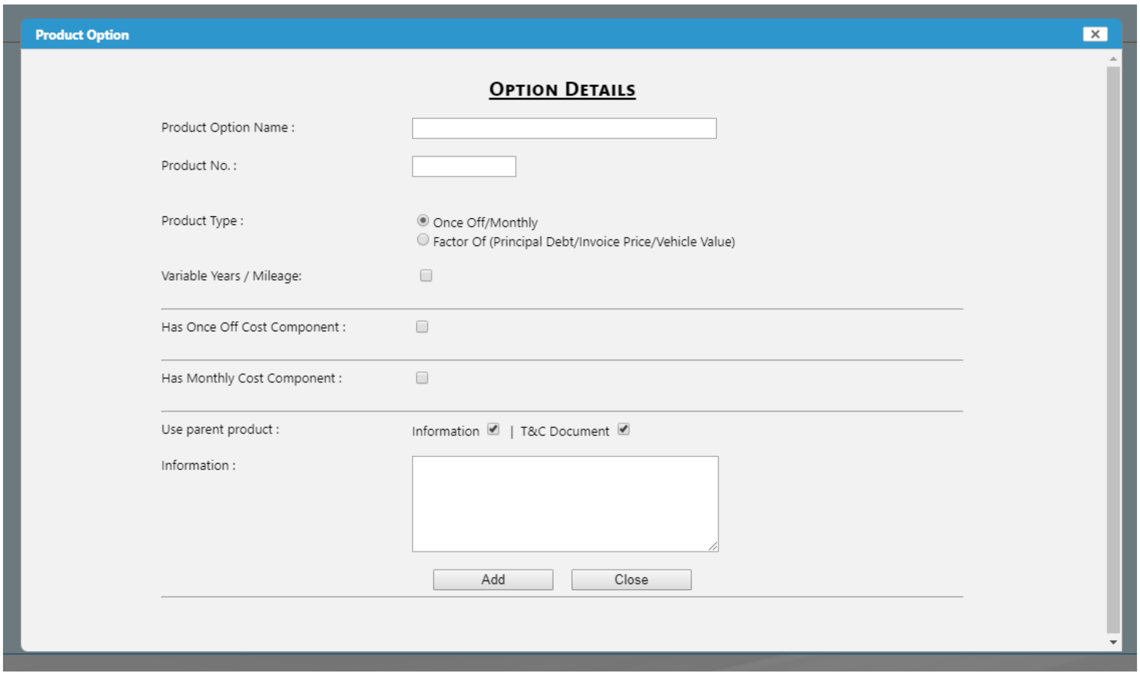
Select the Product Category and the Supplier, and enter the Parent Product Name. If there is only one product you can tick the "This product has only 1 option" box to utilise the Parent Name only when displaying the product, instead of joining the parent Name with the product option Name.

The Parent Information can be left empty if each of the product options will have a different description, however if the product options will all have the same description you can enter it once here instead of re-typing it for each product option.

Once you have saved the Parent product you will be able to upload a Terms & Conditions / Sales documentation PDF as well as a video that will be available for the customer to view when choosing their package. As with the product description you can choose to upload a document/video per product option or choose to use a single document/video for the parent and have all the product options use the same ones.

Underneath the T&Cs section is the link to add a new product option, and the list of currently available product options.

You are required to enter the option name and select what type of product you are adding.

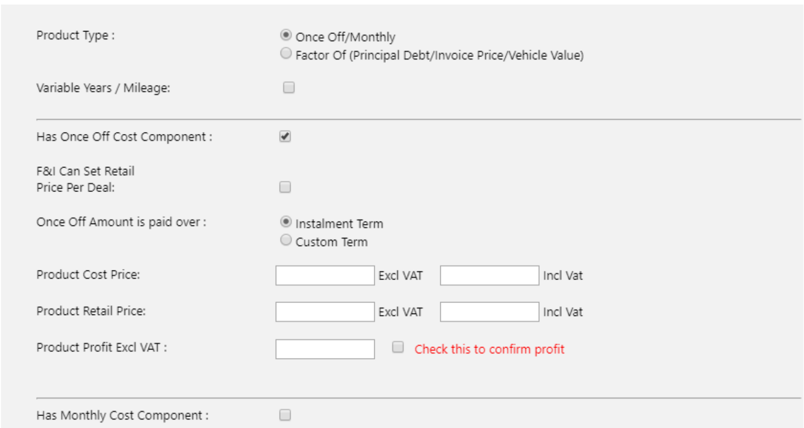


The Once Off/Monthly product is the standard product type and is made of a once off cost (which is included in the instalment calculation over the instalment period e.g. R5000 calculated over the 72 months at 12% = R190.36 per month) and/or a monthly cost (which is added onto the instalment amount after the calculation e.g. a flat R300 per month for the 72 months).

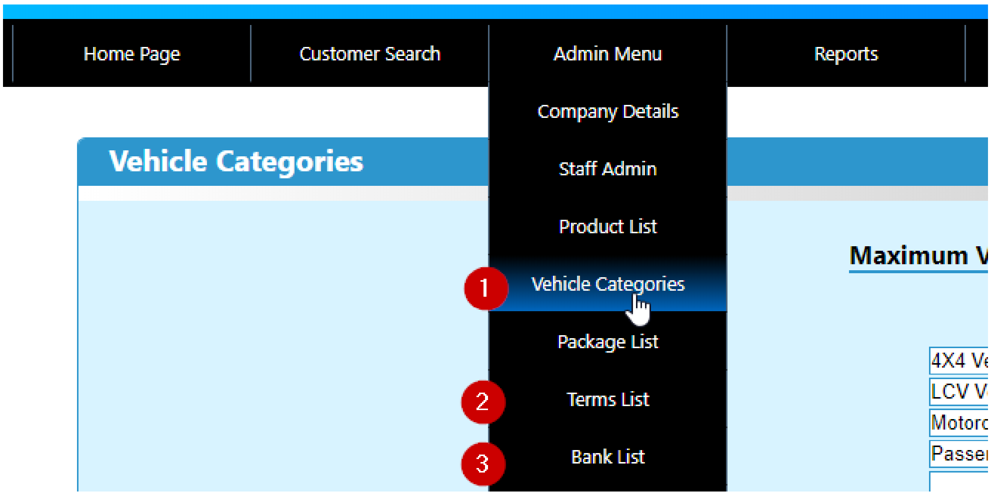
If the F&I will change the price of the product from deal to deal, you can enable this by ticking the 'F&I Can Set Retail Price Per Deal' tickbox.

If the product is not calculated over the entire period you can change from the Instalment Term to a custom term, which will allow you to enter the term length for the product (e.g. 36 months instead of the term of the deal).

You can also enter the product option description and T&C document and video here, or select to us the parent product description and T&Cs.



F&I - Setting Up EasyFin – Categories, Terms and Banks

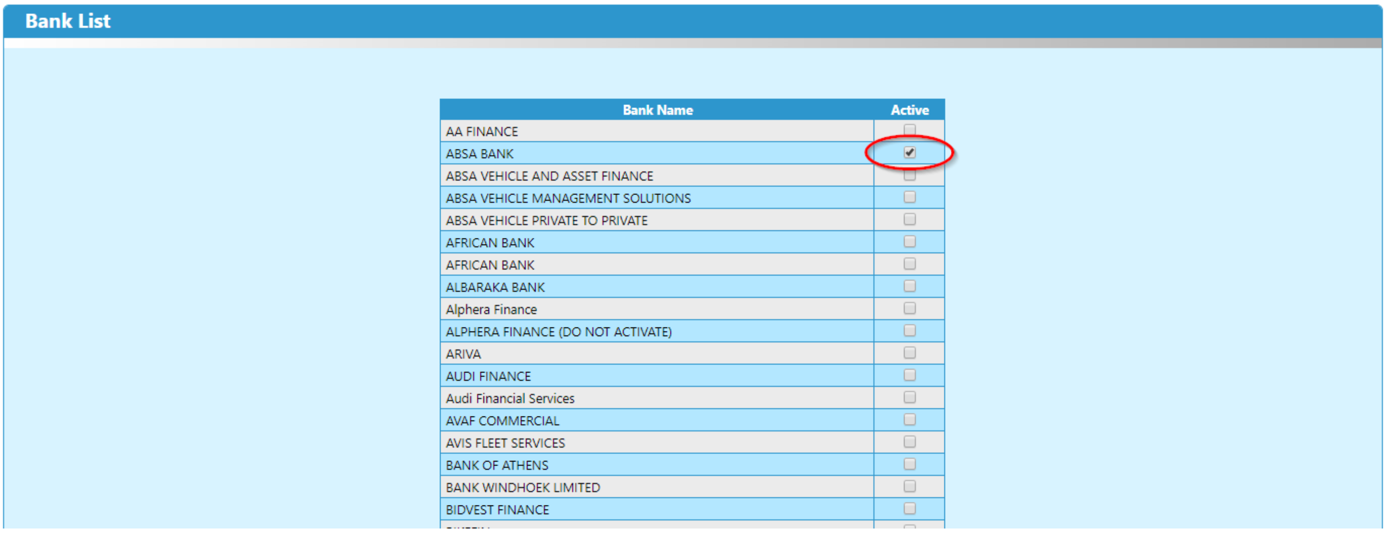


If your dealership is linked to a Head Office Branch your Vehicle Categories (#1 in screenshot above) and Finance Terms (#2 in screenshot above) should already be set up.

The vehicle categories will be used to filter which packages are applicable for which deals, so you can set up different default packages for a passenger vehicle compared to a SUV. This will be un-editable if you are linked to a Head Office branch.

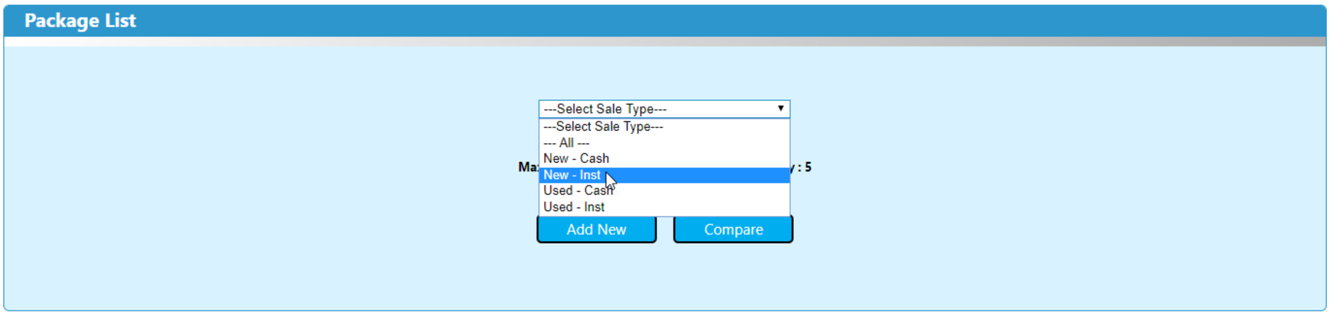
The list of Finance terms can be updated at any point but should already have several pre-set options.

When you open the list of banks your dealership can submit to (#3 in screenshot above), you will see that there are many banks available, however only the ones you mark as 'Active' will be visible when going through the deal process.



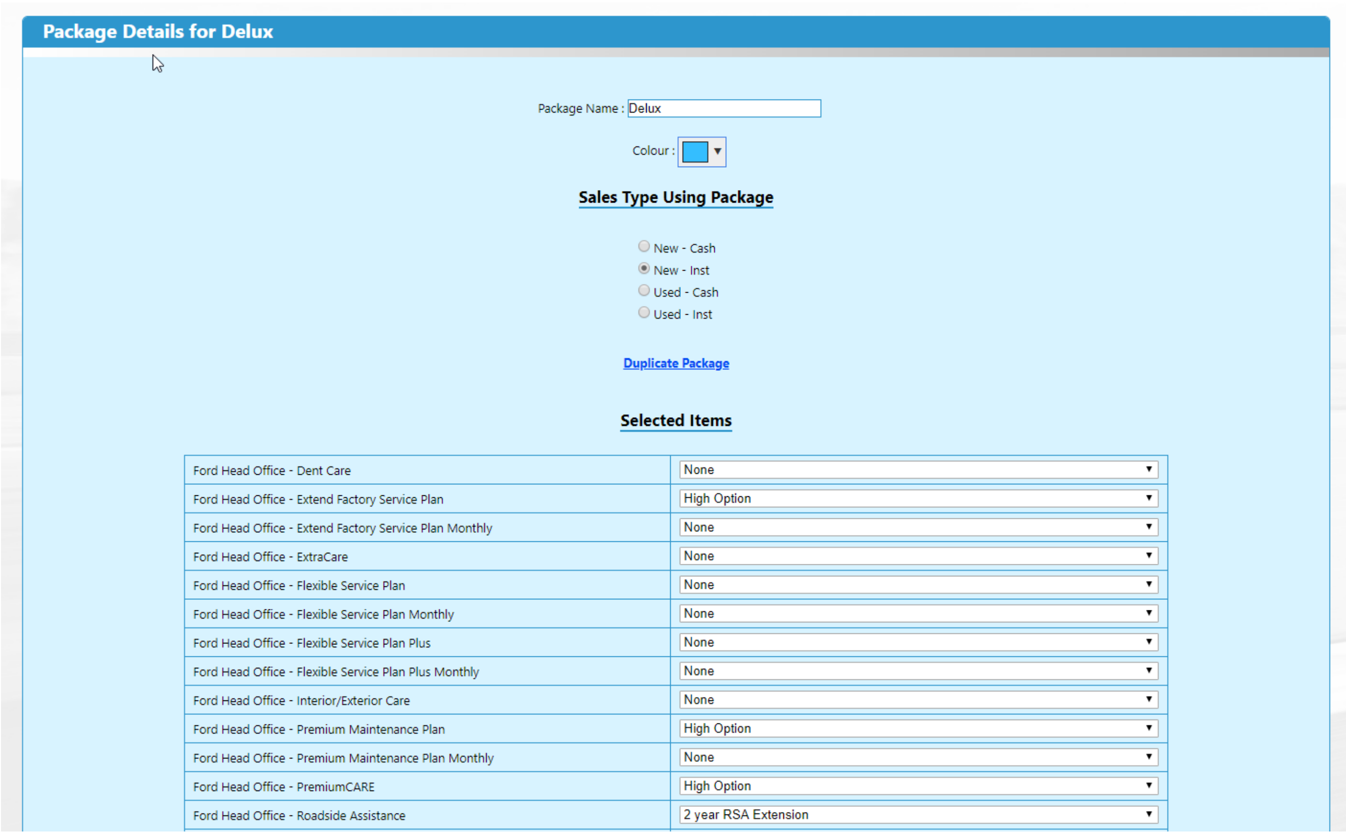
F&I - Setting Up EasyFin – Creating Default Packages

You can view the list of packages available per Sale Type by going to 'Admin Menu' and clicking on 'Package list', then choosing the Sale Type from the dropdown list.

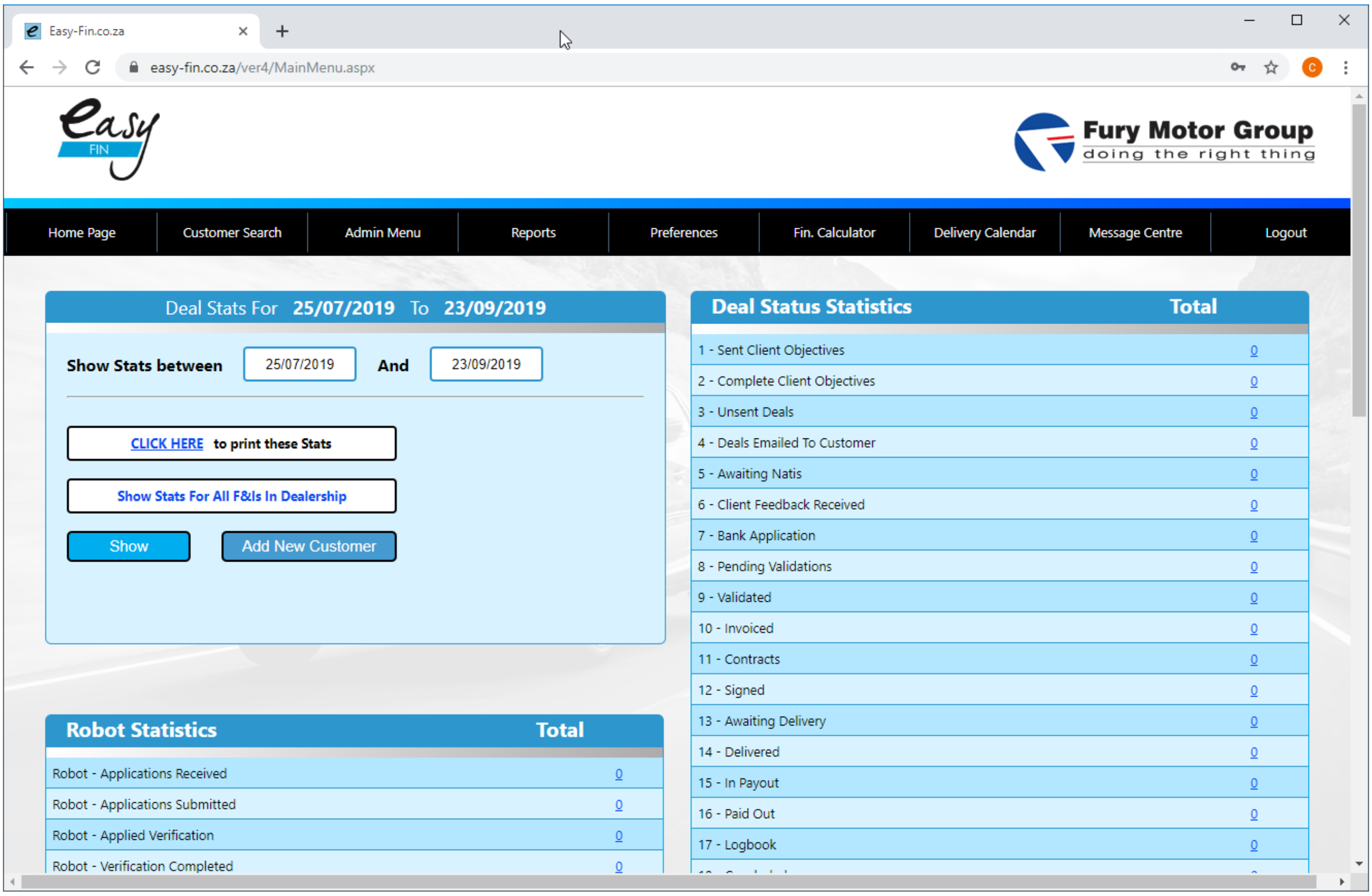


The list of packages will load for the selected Sale Type and you will see which packages have been selected for each of the vehicle categories (e.g. for a New – Instalment deal Package 1, 2 and 3 might be selected for deals on passenger vehicles and 4x4s, whereas package 4, 5 and 6 might be selected for LCVs).

You can click on the Package names to edit the package and change which products are selected for it by default. If the packages have been set up by head office they will be pre-populated, but you will be able to change the package names/background colours as well as change the products. New products can be added to the package by clicking the "Add/Search product" button

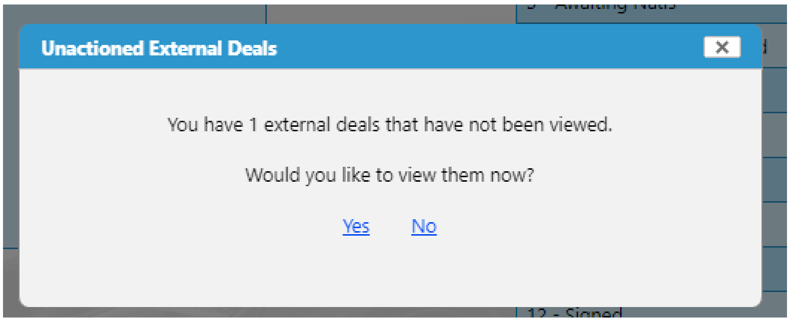


F&I - Easy Fin Home Page



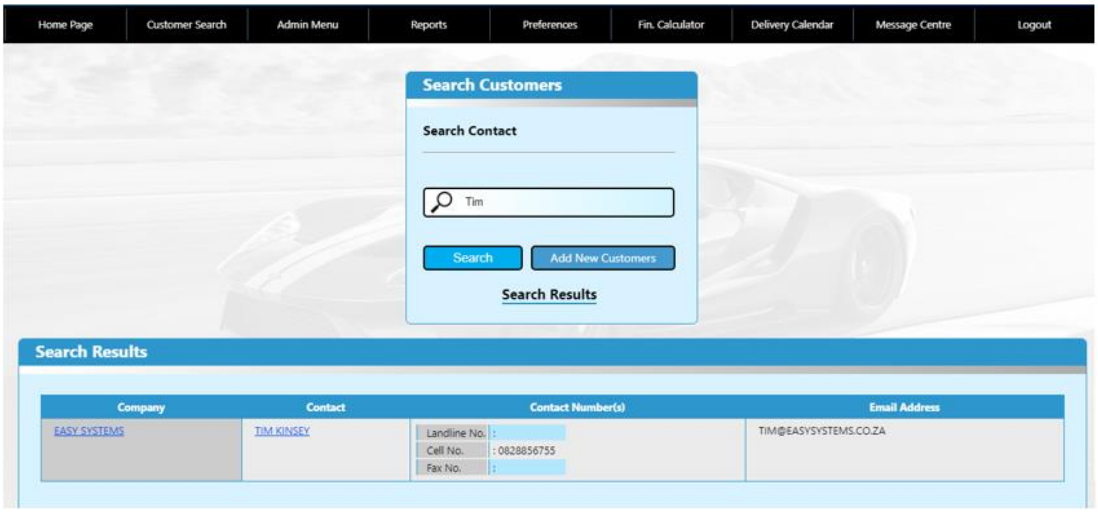
- From your homepage, you are able to navigate the whole system. The homepage will show how many deals you have per deal status as per the image above. Clicking on the number next to the deal status will display all deals currently sitting at that deal status at the bottom of the page.

- You are also able to start an external deal that has been submitted to Easy-FIN from Signio or Seriti.

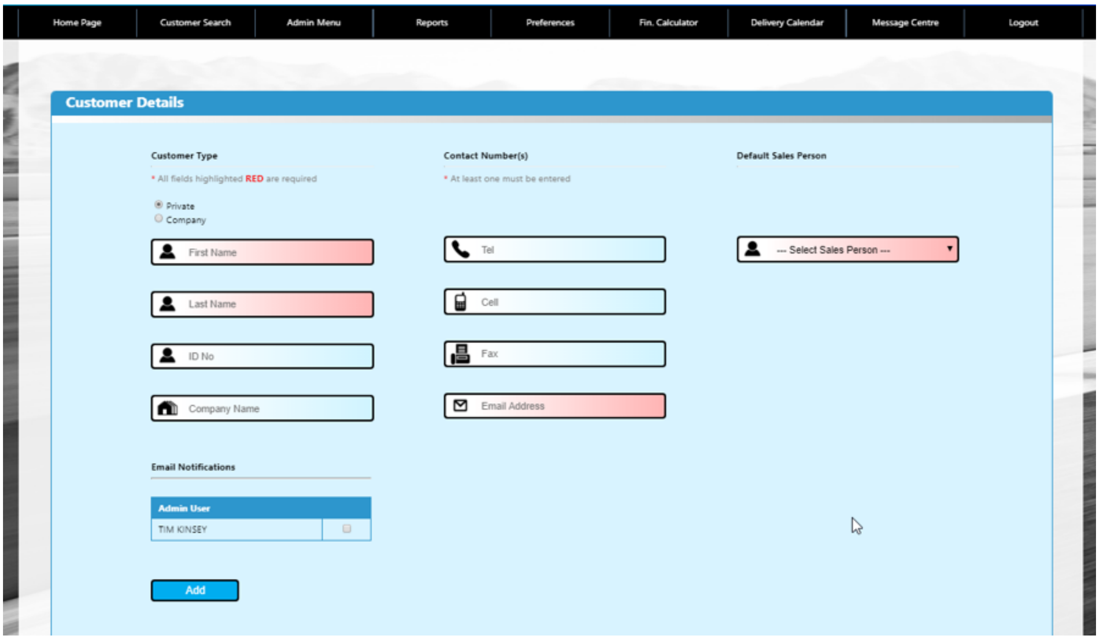


- You can click on "Customer Search" to search for an old client or add a new client manually.

F&I - Searching or Adding Clients



- From the “Customer Search” tab, you can search for a client or add a new client.
- Clicking on an existing client or clicking “Add New” will take you to the following screen. It will either be populated with the client’s details or prompt you to add the client’s details.

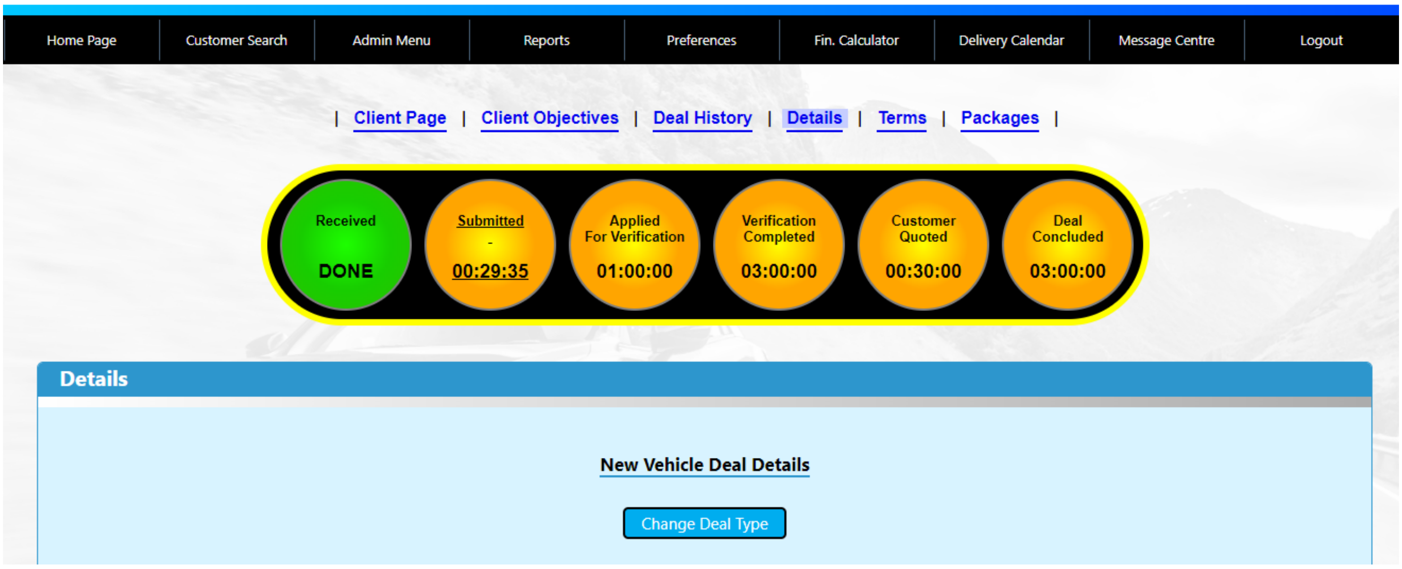


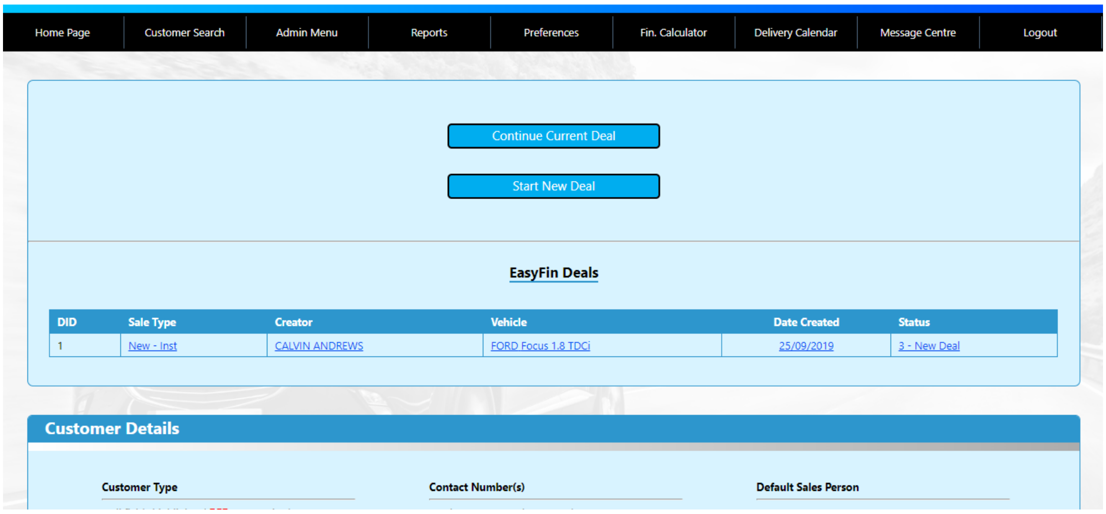
F&I - Starting a deal

<u>EasyFin Robots</u>

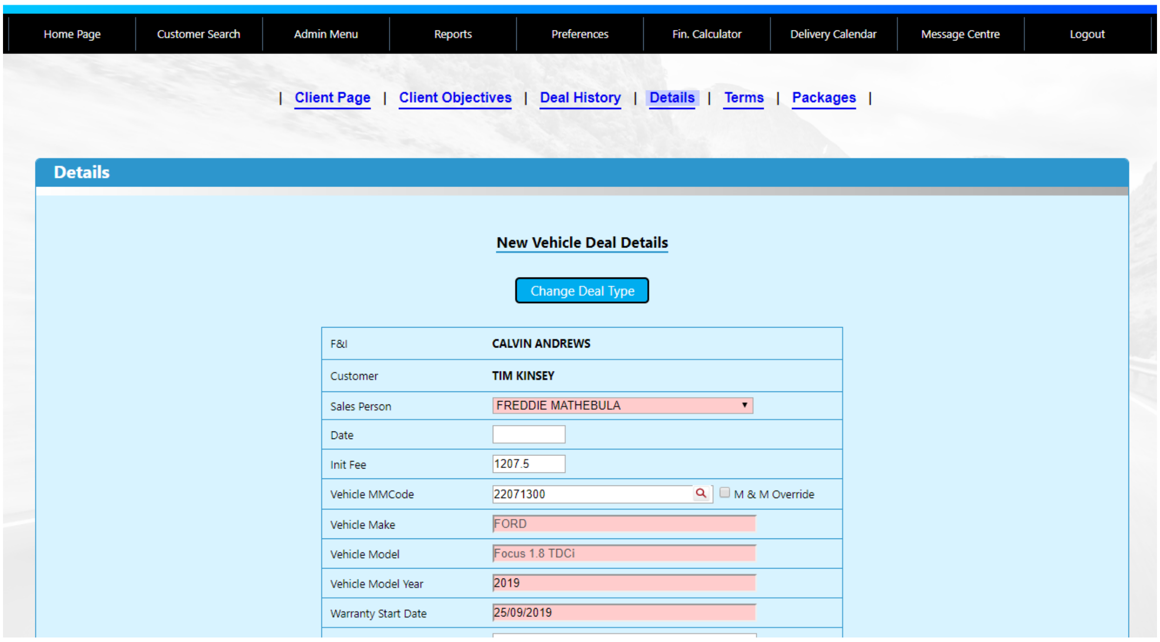
The EasyFin robots are an optional feature that can assist with tracking whether a deal is progressing at the expected rate.

The robots at the top of the client page and the various deal pages show the allocated times for each step of the deal process. To complete the current stage of the deal you must click on the robot that is currently running (In screenshot 1 below the Submitted robot is currently counting down and must be clicked to proceed). Upon clicking on a robot, the client and sales executive will receive an email and an SMS updating them on the progress of their deal and the robot will either turn red or green. Any robot where you go over the allocated time will appear red. You will need to complete the Submitted, Applied for Verification, and Verification Completed robots before you will be able to email the deal to the customer and complete the Customer Quoted robot. The Customer Quoted robot cannot be clicked and will be automatically completed once the email is sent to the customer. The Deal Concluded robot will likewise be completed once the customer has chosen the package they would like to go with. Any robot stage where you go over the allocated time will appear red.





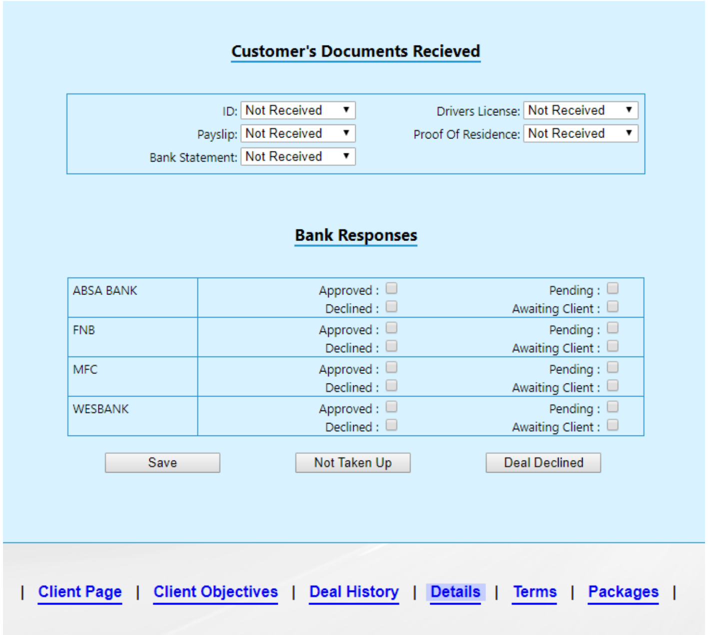
- Once you have searched / added a new customer, you can either continue an existing deal if you are currently busy with one, or Start New Deal.
- Follow the prompts asking what type of deal is being started and select whether you would like to send the Clients Objectives for the customer to populate to get a better idea of their needs. Once you completed the process you will get to a page with the vehicle deal information.
- This screen should be pre populated if the deal was submitted from an external source, or you will need to populate at least the required fields with a pink background.



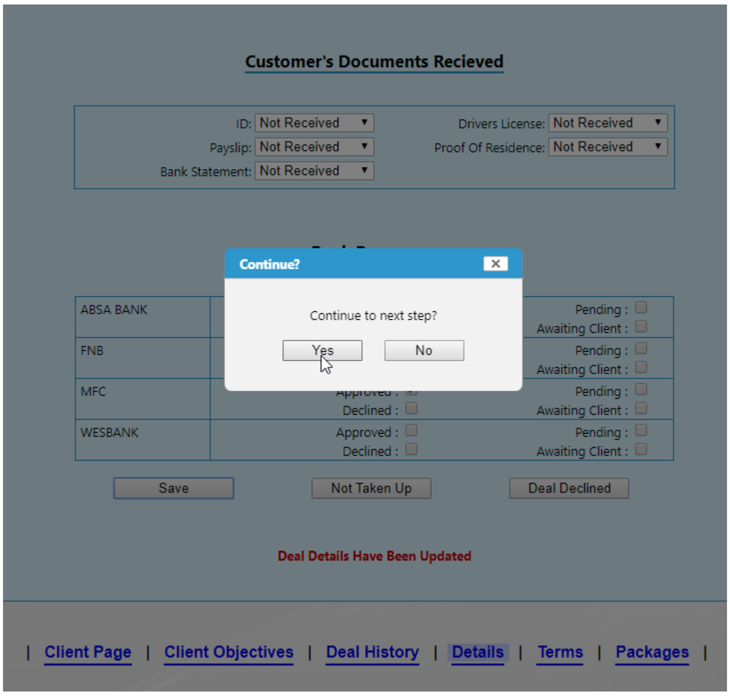
- Follow the screen prompts for information and make sure that all of the Pink fields are correctly populated. Keep scrolling down until you have completed the whole form.

- At the bottom of this screen you will be able to select which documents you have received from the client. This will then automatically update future correspondence to the client reminding them that the remaining documents are still required before the vehicle can be released.

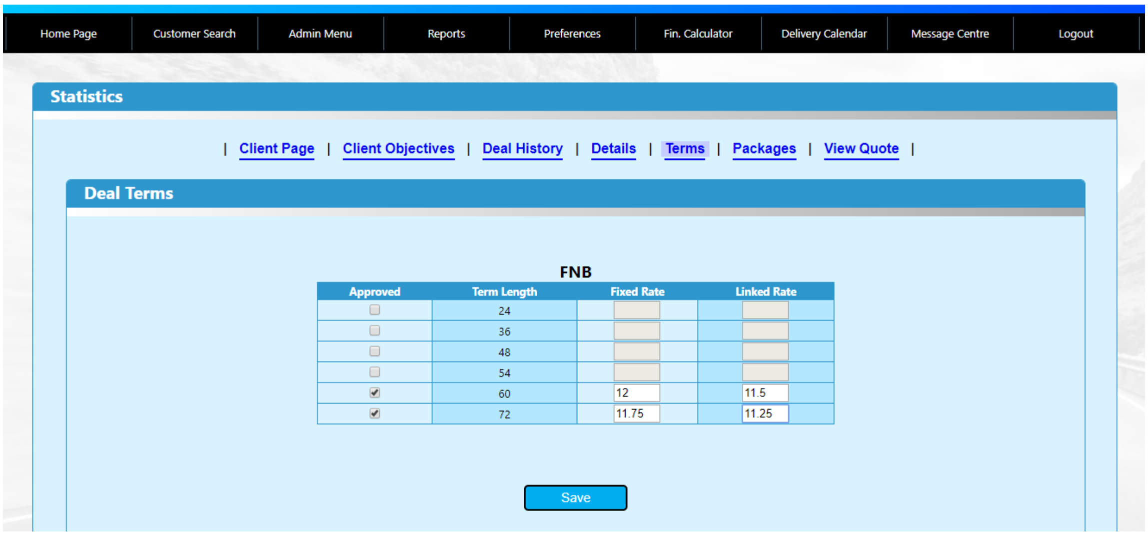
- You must select at least 1 bank that has approved the deal so we can send the deal options to the customer.



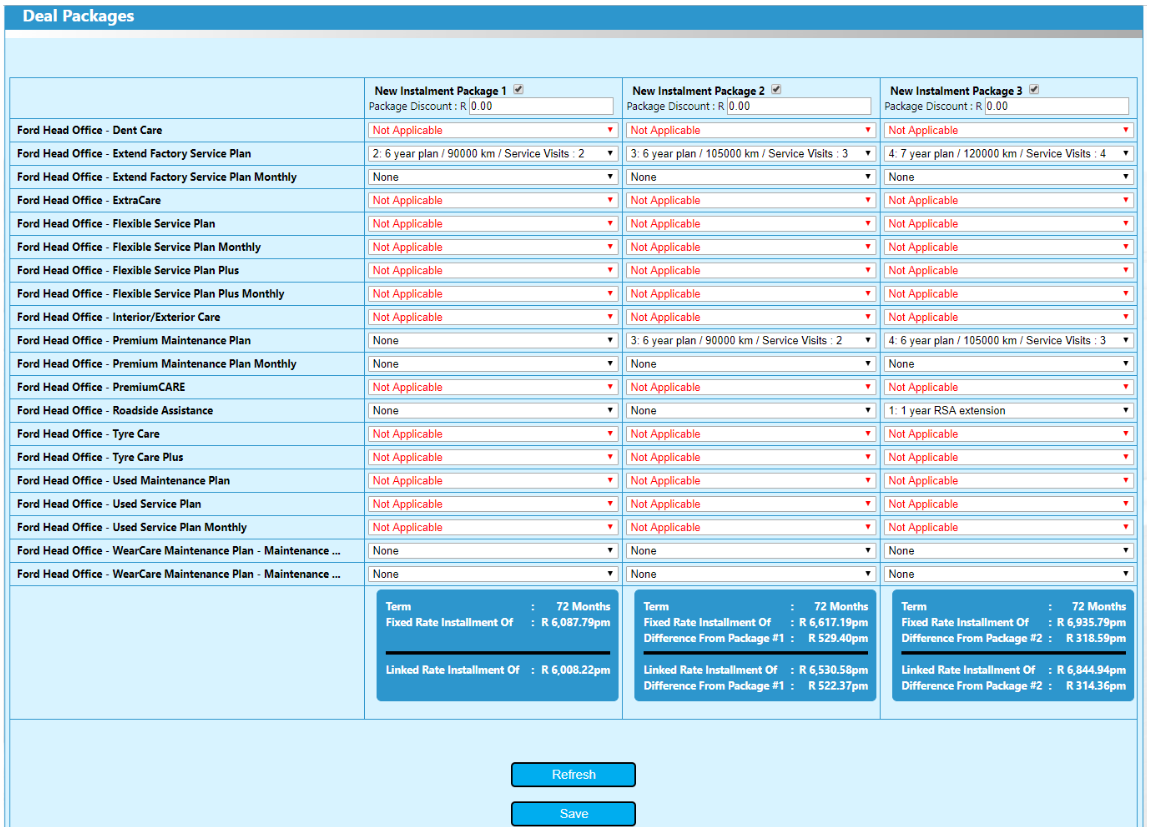
- Once you have saved the details should see a confirmation popup to take you to the next step, alternatively you can click on the 'Terms' link at the top or bottom of the page.



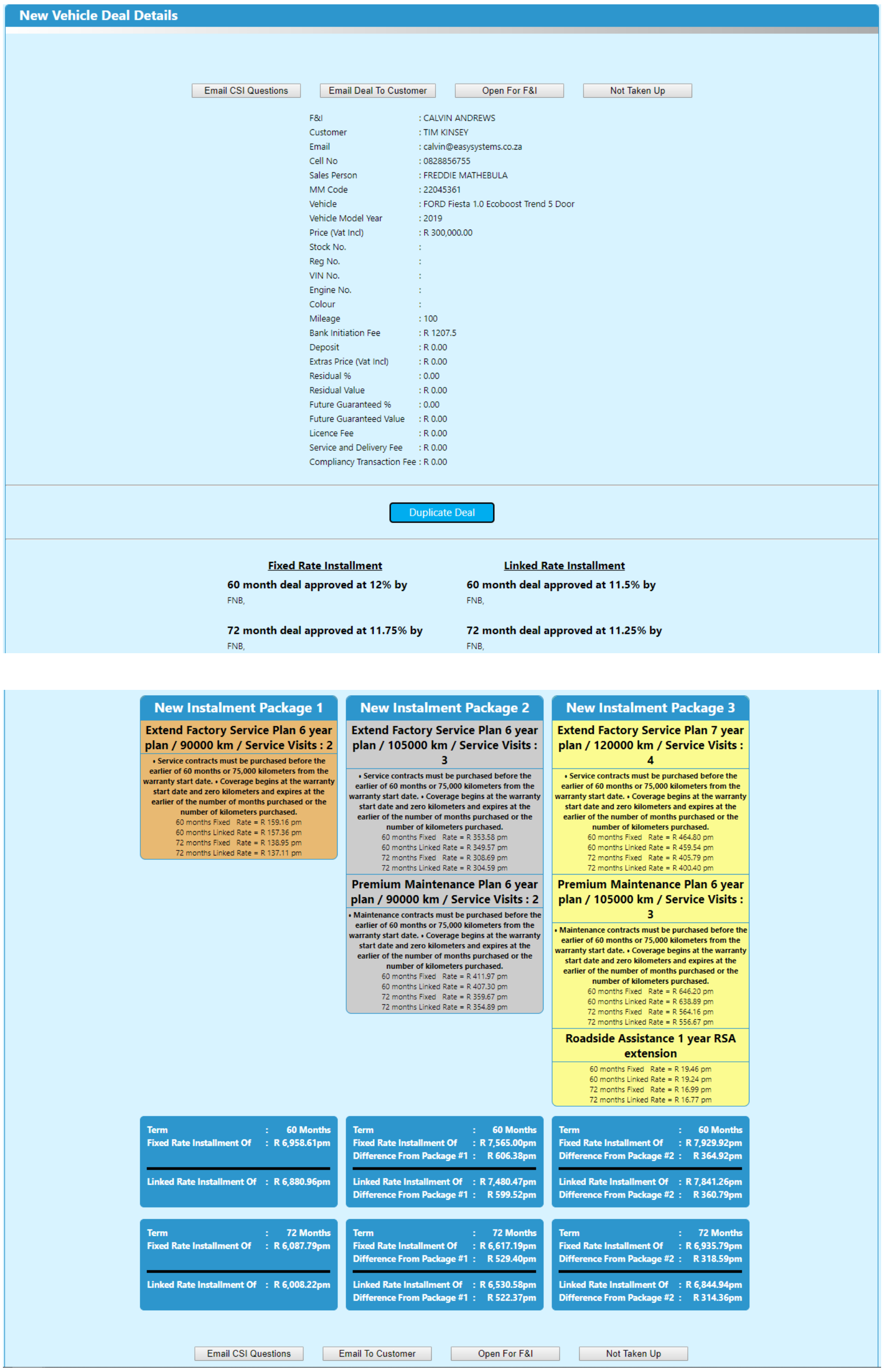
- Populate the terms that the deal has been approved for and the rate at which it has been approved and click save.



- The system will then open the pre populated package options that you/your F&I manager has chosen. This is designed in this way to save you time and that only small customisation is required per deal rather than having to select everything manually ever time.



- You will see the differing costs per package at the bottom of the screen, after making changes click on the 'Refresh' button' to update the totals. Click Save once you are happy with the products.



- On the Deal Quote page you will see the a page similar to the screenshot on the left with the selected packages for your client.

- Again you will be able to see the differences between the 3 options with the monthly instalment values and the difference in instalment costs between the 3 options.

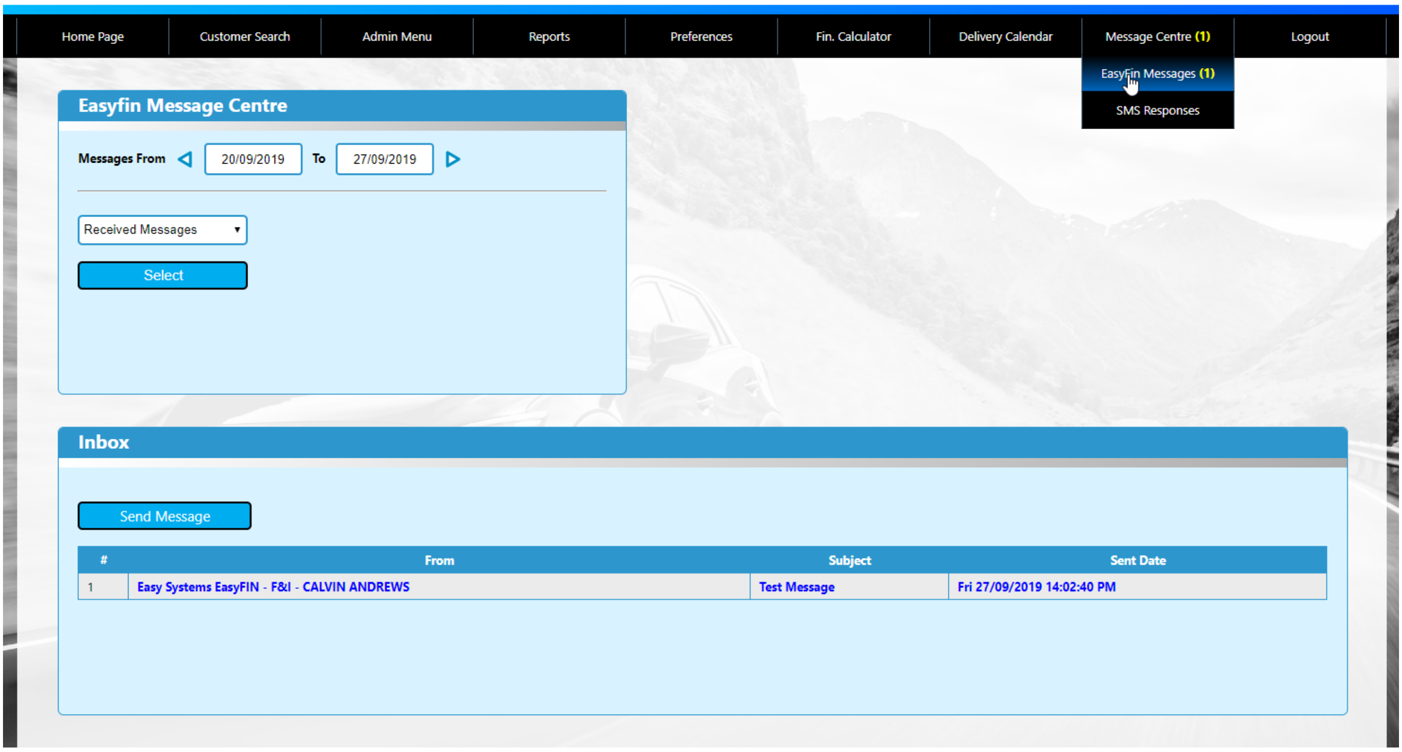
- Click the "Email to Customer" button and the system will SMS and email your client with the instructions on how the client can interact with the packages you have set up for your customer. (If EasyFin timing Robots are enabled this button will only be available if the previous steps have been completed)

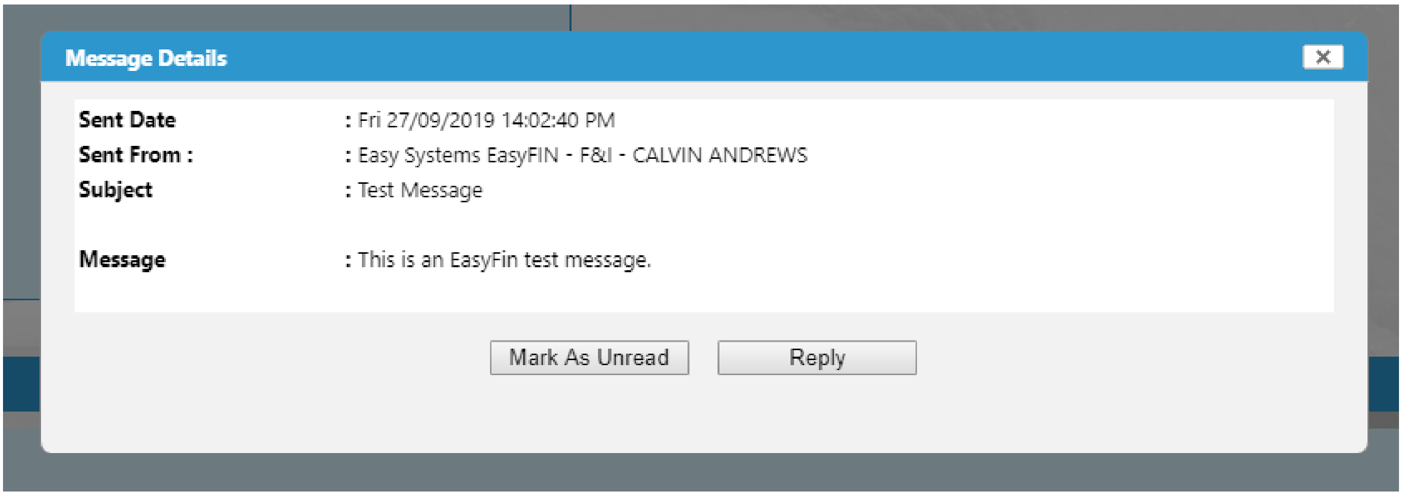
- If the customer is sitting with you, they do not have an email address, or if they cannot access the email with their packages you can click the 'Open For F&I' which will open the client side of the process and allow you to choose the client's desired package on their behalf.

F&I - Additional Features – Message Centre and SMS responses

In EasyFin there is a built-in message centre that allows you to send messages to and receive messages from staff within your dealership, as well as other dealerships within your group. This can be accessed by going to 'Message Centre' and clicking on 'EasyFin Messages'.

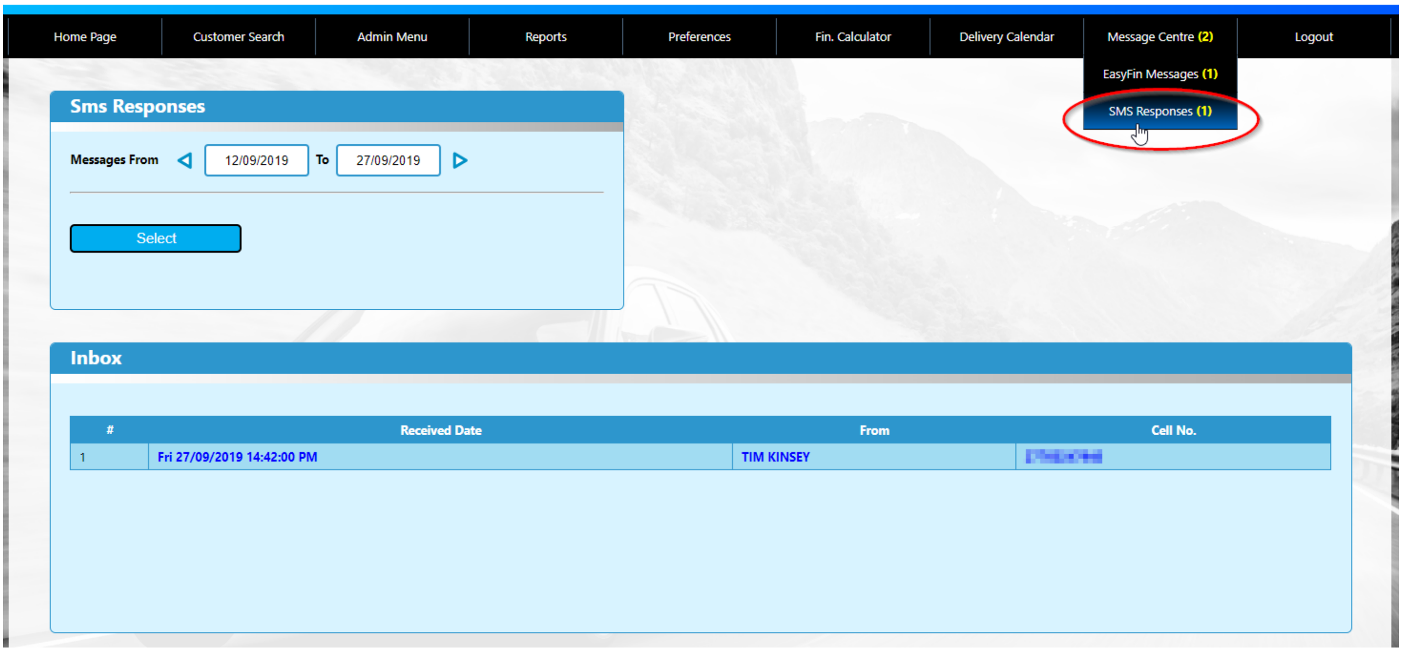
If there are any unread messages sent to you, you will see a notification on your menu bar with the total unread message count. Unread messages will display with a dark blue colour on your message list and can be read by clicking on them.

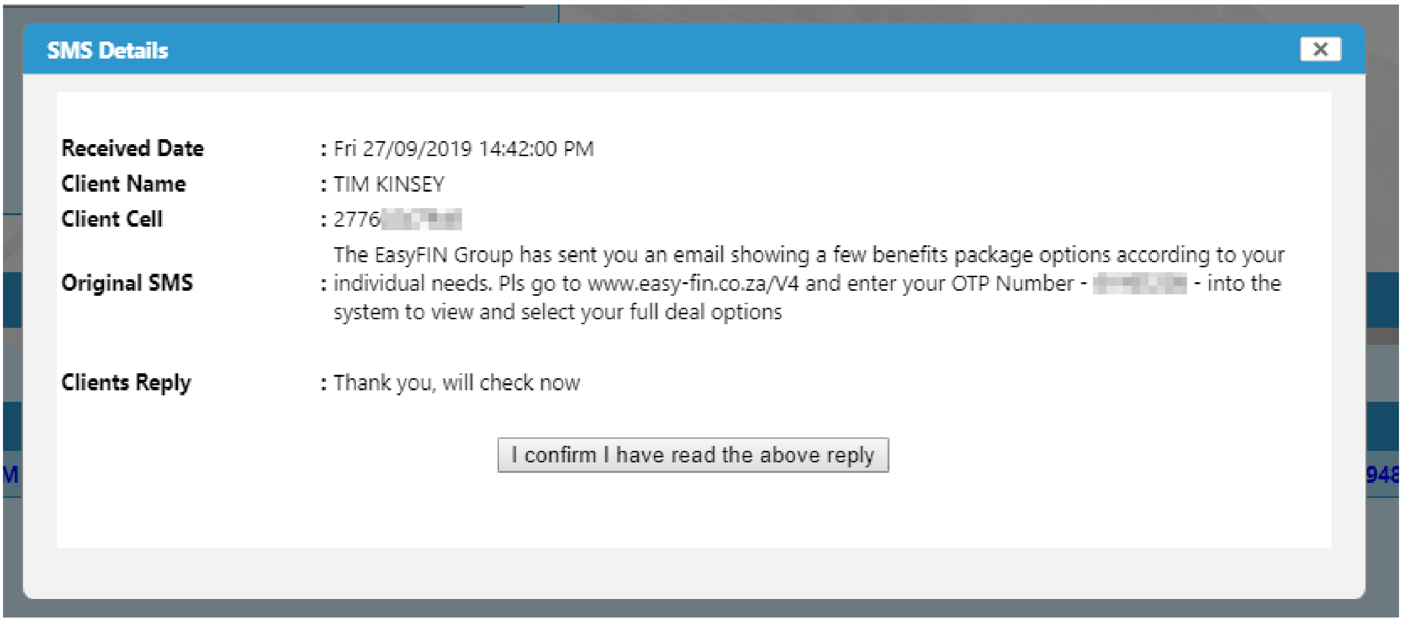




The other facility available in the Message Centre is the ability to view replies to SMSes sent through the system. This can be accessed by going to ‘Message Centre’ and clicking on ‘SMS Responses’.

If a customer replies to a system message you will receive a notification on the menu the same as if you had an unread message. Unread messages will display with a dark blue colour on your message list and can be marked as read by clicking on them and clicking the ‘I confirm I have read the above reply’ button.



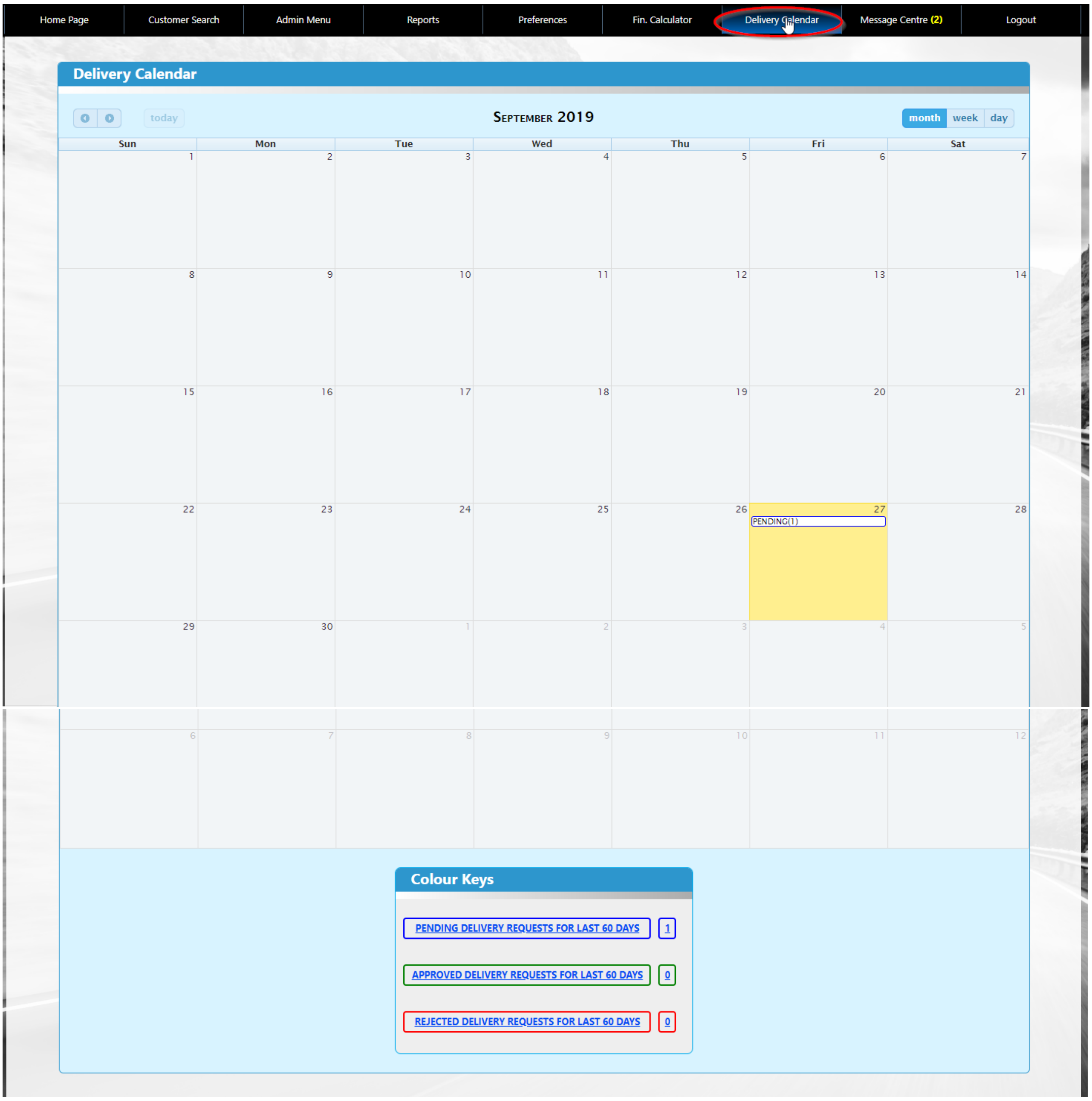


F&I - Additional Features – Delivery Requests

In the sales executive section of EasyFin they have the ability to create a delivery request, or to send an email to the customer to request a date and time for their vehicle delivery.

Once a request is made you will receive and email with the details of the delivery request and you will be able to view it on the delivery calendar on the system. This can be found by clicking on the 'Delivery Calendar' menu option.

You will see the current month's calendar with clickable banners on each day reflecting the delivery requests. There are also clickable totals underneath the calendar which will take you to a list of all the relevant delivery requests of that type for the last 60 days.



There are 3 different statuses for delivery requests.

- 'Pending' which have not been dealt with.
- 'Approved' which have been accepted by the F&I.
- 'Rejected' which have been declined by the F&I.

Once you have clicked on either a banner in the calendar or on one of the totals at the bottom you will be able to view the relevant delivery requests of that type. If you have clicked on a 'Pending' request you can then click on the 'PENDING APPROVAL' link to either approve or reject the request which will notify both the Sales Exec and the customer.