

Using DeskManager in Florida Temporary Tags and Registration [ETR]

As of July 1st 2008, all dealers in Florida are now required to issue Temporary Tags and Temporary Registration via electronic means. This is referred to as ETR which stands for Electronic Temporary Registration. We have incorporated this feature into DeskManager and it can be accessed when creating or working with an existing deal for all Florida Customers.

Dealers will continue to create their deals in the same way as they have previously. There will be an extra step that can be performed during this process when the user is ready to print these items for the customer. Step-by-step instructions can be found later in this document.

Before getting to the process of requesting and printing the electronic registration papers, the dealer will need to create and maintain an account balance in the system for the charges related to this electronic processing. Think of this as something like a pre-paid phone card. The dealer will buy registrations in advance and they will be deducted from the dealers account as the system uses them. All electronic transactions will be handled through a new service known as AutoManager LIVE! See the topic Getting Started with ETR for more information.

AutoManager LIVE! is a service developed by AutoManager to allow for many different types of electronic transactions to take place from within DeskManager. Announcements regarding other features and products available in DeskManager through the AutoManager LIVE! service will be found on the AutoManager website as these items become available. Keep informed on all the tools AutoManager provides to help run a successful dealership by visiting <http://www.automanager.com>.

The forms that will be used for the printing of the Florida Temporary Tags must be purchased through AutoManager. Contact the dealer's account representative by calling 800-300-2808. Having the dealership's client ID number readily available will help speed the process. This ID number can be found in DeskManager in the Help menu under About DeskManager.

Brief overview of the ETR menu in DeskManager

Below we have an example of a deal. By clicking on the ETR button we see next to the County Tax Rate and License fields, we are presented with a list of choices. This document will go over each of these menu options and their functions in the following sections. Later this document shall go into the entire process in greater detail.

The screenshot shows the 'Deal/Trade' window in DeskManager. The interface includes a toolbar with icons for Save, Edit, RollBack, Print, Options, Forms, and Credit. Below the toolbar, there are fields for Sale Date (8/8/2008), Stock# (INV1014), Status (Pending), and Customer (JURGEN KAACK). A dropdown menu is open over the 'ETR' field, listing options such as 'Issue ETR', 'Print Temp Tag', 'Print Temp Registration', 'Void ETR', 'ETR History', 'Purchase ETR Credit', 'Check ETR Credit Balance', 'Learn more about ETR', and 'How to use ETR in DeskManager'. The main form contains various financial and vehicle details, including Cash Price (15900.00), County Tax Rate (8.250), License (8.25), and Total Down (5000.00). A summary table at the bottom right shows Taxable Sale (15925.00), State Tax (955.50), County Tax (412.50), Total Down (5000.00), Amount Financed (12566.25), Finance Charge (3787.54), Payment (454.52), Round Final (445.59), Total Payments (16353.79), and Total Sale (21353.79). The status bar at the bottom indicates the deal was added by MASTER on 08/08/2008 and updated by MASTER on 08/13/2008.

Issue ETR

This is where the dealer will be able to begin the process of requesting the Temporary Tag and Registration. The user will be presented with information about the customer and the vehicle, the system will return data from the Florida databases and request any further information, eventually the dealer will be notified when the transaction successfully took place.

Print Temp Tag

After the Issue ETR procedure has completed successfully, the dealer will use this option to print the Temporary Registration. This will require that the dealer will have the blank Temporary Registration forms for printing and the process will fill in the blanks on the plate form. The forms that will be used for the printing of the Florida Temporary Tags must be purchased through AutoManager. Contact the dealer's account representative by calling 800-300-2808. Having the dealership's client ID number readily available will help speed the process. This ID number can be found in DeskManager in the Help menu under About DeskManager.

Print Temp Registration

After the Issue ETR procedure has completed successfully, the dealer will be able to use this option to print the Temporary Registration paperwork that the customer will need to keep in the vehicle.

Void ETR

By using this option the dealer will be allowed to Void a previously issued Temporary Tag and Registration should the need arise. This action will completely Void this Temporary Tag and Registration with the state of Florida. **Should it be necessary to Void a Temporary Tag, it must be done by the end of that same business day.** If an ETR Transaction is Voided the same day it was issued, the dealer will be credited for the ETR fees relating to that transaction. ETR Transactions cannot be Voided through DeskManager after the business day upon which it was issued.

ETR History

Here is where a user will be able to review dealership specific ETR Historical data for all vehicles as related to any ETR requests made from within DeskManager. This list should contain all successful transactions including any transactions that were successfully voided.

Purchase ETR Credit

This option will take the dealer to a web page that is used to purchase credit for the dealer's ETR account. It is a secure web page that can handle credit card transactions and will also display the balance of ETR credit the dealer still has.

Check ETR Credit Balance

This option will take the dealer to a web page where the ETR Credit Balance can be reviewed. This is a secure web page that is able to perform credit card transactions should the dealer need to add credit to their ETR credit balance.

Learn more about ETR

This option will take the user to a Frequently Asked Questions style web page with more information about ETR.

How to use ETR in DeskManager

This option will take the user to a web page with details on the use of the ETR functions in DeskManager. (This document.)

Before you start issuing ETR, you need to do a couple things to get ready for it:

1. Order your temp license plates from AutoManager. You can do this by contacting your Account Rep at AutoManager, by calling (800) 300-2808. We sell stocks of temp plates with min order of 50 temp plates. This stock comes with control number pre printed on the plates. Remember, you can only use the stock of temp plates you purchase from AutoManager to use with the ETR functionality of DeskManager.
2. Prepay for a number of ETRs you'd be issuing. AutoManager requires prepayment for ETR transactions to simplify the process and keep the pricing for each transaction as low as it is. To prepay for the transactions choose "Purchase ETR Credit" from the ETR dropdown in the Deal Screen. The system will guide you through the steps for paying by credit card.

In the following sections, you will be able to get more detailed information on how each step works.

Important Notes regarding Florida ETR

This process requires an active internet connection to function correctly.

If you have a firewall or anti-virus program that tends to interfere with other programs that need the internet, it may be necessary to tell the firewall or anti-virus program to allow DeskManager to access your internet. From time to time the Florida state DHSMV will bring their servers down for maintenance. In these situations, DeskManager will not be able to transmit ETR requests. These requests will have to be attempted again at a later time when the Florida DHSMV servers are back on-line.

Issuing ETR requires an account to be charged for the ETR fees.

Remember, there is a charge for issuing ETR in Florida. For information on the charged amounts, please refer to <http://www.automanager.com/auto-dealer-software/features/etr.html>. The dealer is required to open and maintain a prepaid balance with AutoManager for issuing ETRs, where ETR credits are purchased for use in DeskManager when issuing ETR. This account is created and maintained by the dealer from within DeskManager. See the Getting Started with ETR topic.

ETR may only be issued twice per vehicle, per Deal.

As a result, it is a good idea to be very careful that all the correct information has been entered into the deal for the customer's information and into the vehicle details regarding the vehicle itself. Mistakes can be corrected if they are caught in time. If a mistake was made when issuing ETR, you can void your ETR request as long as you void the ETR **on the same business day it was issued**. If the ETR is voided on the same day, the ETR account will be credited for the original amount charged, but only if it is voided on the same business day as it was issued. Should you need to void an older transaction, you would have to call AutoManager, and AutoManager in turn will have to send an email to FLDHSMV asking them to correct the problem. Should you get a vehicle back and sell it to another customer, you will be able to issue ETR twice for this new deal.

If necessary, ETR Transactions must be Voided the same day.

Currently the design of the Florida ETR servers is such that any transactions that need to be voided **must** take place on the **same business day** as the ETR was issued. When an ETR transaction is voided in the same business day, the dealers ETR account will be credited for the original amount charged.

Getting Started with ETR

How to purchase Florida ETR Credit in DeskManager.

Because this is a prepaid system for the issuing of ETR in Florida, DeskManager will require that the dealership must have a balance to draw from. To establish this balance, launch DeskManager and open any deal that has been saved into the system. From within this DeskManager deal on the main Deal tab, find and click on the ETR button. This will display the following menu.

License:	8.25	ETR	Cash Down:	5,000.00
Registration:	150.00			.00
Transfer Fee:	65.00			
Doc Stamps:	40.00			
Lien Fee:	10.00			
Warranty Tax:	0.00			
Taxable Sale:	15925.00			00
State Tax:	955.50		Total Down:	5000.00

- Issue ETR
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- Print Temp Registration
- Void ETR
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Select the option Purchase ETR Credit. This will bring you to an Automanager LIVE! Secure web page that will allow you to purchase ETR credit using a credit card. Because this is being launched from within DeskManager, the system will know the dealership's AutoManager Client ID and will automatically associate this payment with the company ID number.

Process Payment for: Electronic Transaction Prepayment

Amount:

Client ID: **012309**
Your Company Name Here
Los Angeles, CO 90025

Credit Card Details *all fields are required

Full Name:
as it appears on card

Street Address:
of card billing address

Zip/Postal Code:
of card billing address

Card Type: VISA MasterCard Discover American Express

Card Number:

Expiration: /

Verification Code: [what is this?](#)

E-mail Address:
*optional If provided, a receipt for your payment will be sent to you within one business day.

Elec. Trans. Balance: **\$89.50**

Last Payment: **N/A**

Process Payment »

The system accepts Visa, Master Card, Discover and American Express. The minimum credit purchase amount is \$100.00. The credit purchase amount can be increased in increments of \$50.00 up to a maximum purchase of \$500.00. If you provide an e-mail address, we can send you a receipt for your payment.

How to review your ETR Credit balance.

Follow the same procedure for the purchase of ETR credit only this time select the next option on the ETR menu 'Check ETR Credit Balance'. This will take the user to a secure web page where the dealership's ETR Credit Balance will be displayed and where more credit can be purchased if needed. Currently the page for purchasing credit and the page for reviewing credit balance look identical.

Process Payment for: Electronic Transaction Prepayment

Amount:

Client ID: **012309**
Your Company Name Here
Los Angeles, CO 90025

Credit Card Details *all fields are required

Full Name:
as it appears on card

Street Address:
of card billing address

Zip/Postal Code:
of card billing address

Card Type:    

Card Number:

Expiration: /

Verification Code: [what is this?](#)

E-mail Address:
***optional** If provided, a receipt for your payment will be sent to you within one business day.

Elec. Trans. Balance: **\$89.50**

Last Payment: **N/A**

Process Payment >>

Step by Step procedure for submitting a Temporary Tag and Registration request

1. Start by creating a deal as the dealership previously had using Desk Manager. The requesting of the Temporary Tag and Registration can be performed at any time while the deal is pending or after it has been saved as a sold deal.
2. On the main Deal tab of the Deal/Trade screen, the user will find the option for ETR. Click on this button and the user will be presented with the following menu.

The screenshot shows a software interface with a table of deal details. A dropdown menu is open over the 'ETR' field, listing several options. The table includes fields for License, Registration, Transfer Fee, Doc Stamps, Lien Fee, Warranty Tax, Taxable Sale, State Tax, Cash Down, and Total Down.

License:	8.25	ETR	Cash Down:	5,000.00
Registration:	150.00			.00
Transfer Fee:	65.00			
Doc Stamps:	40.00			
Lien Fee:	10.00			
Warranty Tax:	0.00			
Taxable Sale:	15925.00			00
State Tax:	955.50		Total Down:	5000.00

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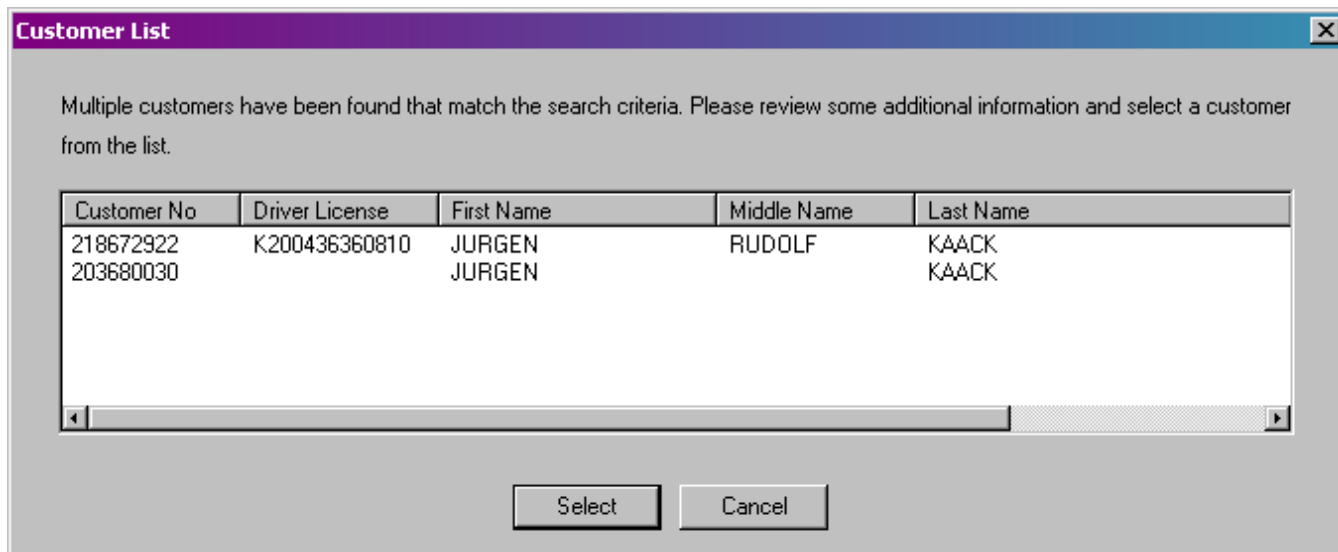
3. Select the option 'Issue ETR'. The program will communicate this request to the Florida DHSMV and present a form based on the customer information provided in the deal for review.

The screenshot shows a window titled 'Issue ETR' with the following fields and options:

- Dealer Info:**
 - License Number: Prefix / Number / Suffix
 - PIN Number: (Assigned when the dealer license is issued)
- VIN:
- Registration Type:**
 - Individual
 - Business
- Florida Driver License No:
- Florida Driver License does not exist or unknown

Buttons:

4. **Issue ETR – Primary Screen.** The very first time a customer attempts to request ETR for a vehicle, they will be required to enter the Dealer’s License Number and a PIN number. These will be assigned to the dealership at the time they are issued a dealer license from the Florida DHSMV. When submitting information about the customer to the Florida DHSMV, the user can either submit this request with Florida Driver License number as shown in the screen capture above, or can select the ‘License does not exist or is unknown’ option to submit using the customer’s First and Last name and date of birth. This information is pulled from the customer tab of the deal in DeskManager so a user should be careful to enter the correct information during the processing of a deal. If the information is being submitted using a Florida Drivers License number the user will be presented with a secondary Issue ETR screen, continue on to the next step. If this information is submitted using the ‘License does not exist or is unknown’ option, the user may be presented with the following screen if there are multiple people in the Florida DHSMV database with the same last name and first name.



- a. **Note** – When using the ‘License does not exist or is unknown’ option, it can be a rare occurrence, but if there should be more than one person in the Florida DHSMV database with that same First Name, Last Name and Date of Birth, then the user will be presented with a list of these different people along with their Driver License Numbers if available. It will be up to the user verify the correct customer has been selected from the list based on the information provided by the Florida DHSMV.

Issue ETR

Vehicle Info

VIN: YS3ED58E913033966 Vehicle Number: Body Type: [Dropdown]

Vehicle Type: [Dropdown: AUTO] Make (Code/Name): [Dropdown: SAA] SAAB [Dropdown]

Year: [Text: 2001] Major Color: [Dropdown: BLUE] Net Weight: [Text]

Gross Weight: [Text] Cubic Centimeters: [Text] Brake Horse Power: [Text]

New Vehicle Length: [Text]

Customer Info

Customer Type: [Text: Individual] Customer Number: [Text: 218672922]

Last Name: [Text: KAACK] First Name: [Text: JURGEN] Middle Name: [Text: RUDOLF]

Florida DL #: [Text: K200436360810] Gender: [Dropdown: Male] Date of Birth: [Text: 03/01/1936]

FEID #: [Text] Company Name: [Text]

Mailing Address

Address: [Text: 1201 Coral Way] City: [Text: MIAMI] State: [Dropdown: FL] ZIP: [Text: 33145]

Insurance Info

Proof of Ins Type: [Dropdown] Company Code: [Text] [Dropdown]

Policy #: [Text]

Temporary Tag Info

Print-On-Demand Control Number: [Text] Log Number: [Text: 211447]

Pre-printed temporary tag

[Cancel] [Submit]

5. **Issue ETR – Secondary Screen.** The secondary screen for issuing ETR is broken down in to several sub-sections, Vehicle Information, Customer Information, Mailing Address, Insurance Information and Temporary Tag Information.

Vehicle Info

VIN: YS3ED58E913033966 Vehicle Number: Body Type: [Dropdown]

Vehicle Type: [Dropdown: AUTO] Make (Code/Name): [Dropdown: SAA] SAAB [Dropdown]

Year: [Text: 2001] Major Color: [Dropdown: BLUE] Net Weight: [Text]

Gross Weight: [Text] Cubic Centimeters: [Text] Brake Horse Power: [Text]

New Vehicle Length: [Text]

a. **Vehicle Information Section** – Depending on the vehicle information as entered into DeskManager for a specific vehicle, there may or may not be a need to make changes in the Vehicle Info area. As noted with the vehicle used in the example, there are several fields that may need attention, Vehicle Type, Make (Code/Name), Year, Major Color and Net Weight. If we were to examine the Major Color field as an example, this field may be in need of attention because the color entered for this car may not match a color as found in the Florida DHSMV's database. Therefore, if the information in DeskManager for a particular field does not match up with the information the Florida DHSMV has in their database, then the user will need to select from the pull-down list the choice that fits closest for the vehicle being registered. This will apply to any of these fields, except for VIN and Vehicle Number, where the information in the field cannot be matched to an option in the same field from the Florida DHSMV database. For the Vehicle Make field, a button is available to the right that will bring up a list of acceptable codes for different Vehicle Makes. See capture below. When searching through the Make Codes list using the

search window, should the first item that is found to match the search name is not the item required, simply click on search button again and it will continue searching through the list for the next item that matches.

- i. **Body Type** – These are the Body Type choices as defined by the Florida DHSMV. Depending on the vehicle being registered, DeskManager may have selected the correct option for this field. If DeskManager was unable to select the correct option, please use the pull-down list to select the correct body type. As the Florida DHSMV is not very clear on how to select a body type, please select the body type that most closely matches the vehicle being registered.
- ii. **Vehicle Type** – These are the Vehicle Type choices and as the Body Type selections, they are also defined by Florida DHSMV. Depending on the vehicle being registered, DeskManager may have selected the correct option for this field. If DeskManager was unable to select the correct option, please use the pull-down list to select the correct vehicle type. Again, the Florida DHSMV is not very clear on how to classify a vehicle type, please select a type that is the closest match to the vehicle being registered.

Vehicle Type: [Dropdown Menu]

Year: [Text Field]

Gross Weight (lb): [Text Field]

Customer Info: [Text Field]

Customer Type: [Text Field]

Vehicle Type Options:

- AMPHIBIAN
- AUTO
- BUS
- MOBILE HOME
- MOTORCYCLE
- OFF-HIGHWAY
- TOOLS
- TRAVEL TRAILER
- TRUCK
- VEHICLE TRAILER
- VESSEL

- iii. **Make (Code/Name)** – There are two fields that are used by Make, the first is the Make Code, the second is the Make Name. If the Florida DHSMV code for a manufacturer is not know, use the button to the right of the field to bring up a list where the user can then search for the desired manufacturer.

Select Make

Search Code: [Text Field] Search Name: [Text Field] [Search]

Code	Name
2-GT	2-G TRAILER CO LLC
SSK	29 SSK
30SB	30SB MONTEREY
34CP	34 COUPE
COUP	351 COUPE
SEA	4 SEA CORPORATION
FOUR	4-WHEEL AUTO CO.
RETB	57 REPLICIA T. BIRD
FIFT	58TH STREET CUSTOMS
AASC	A & A SCOOTERS
AFTR	A & F TRAILER MFG, INC.
AGTR	A G TRONIC, INC.
AZWM	A TO Z WELDING&MFG, INC
ATB	A TRUCK BODY&EQUIPMENT CO.INC.
AAMA	A&A MACHINE CO. INC.

[Select] [Cancel]

- b. **Customer Information Section** – This section will report the detailed information about the customer as provided by the Florida DHSMV database.
- c. **Mailing Address Section** – The fields in the Mailing Address section will return with data according to what is on file in the Florida DHSMV database. Should this information need to be updated, the user may update it here. Changes made to this section will be updated on the Florida DHSMV database.

Mailing Address

Address: 1201 Coral Way

City: MIAMI

State: FL ZIP: 33145

Insurance Info

Proof of Ins Type: [dropdown]

Company Code: [input] [dropdown]

Policy #: [input]

- d. **Insurance Information Section** – For this section, begin by selecting the 'Proof of Insurance Type' from the pull-down list provided. Should the 'Company Code' of the insurance company be known it may be entered into the system, or the user can search for the insurance company by clicking on the button with the double arrows pointing down. The user will be presented with the following screen where the insurance company the customer is using can be selected. From here a user can scroll down the list or type all or part of a company name in the search field to find the company. Just like the Make-Code field if the first item found in a search is not the correct one, simply click search again to continue searching through the list. After selecting the insurance company from the list, remember to enter the customers policy number in the final field.

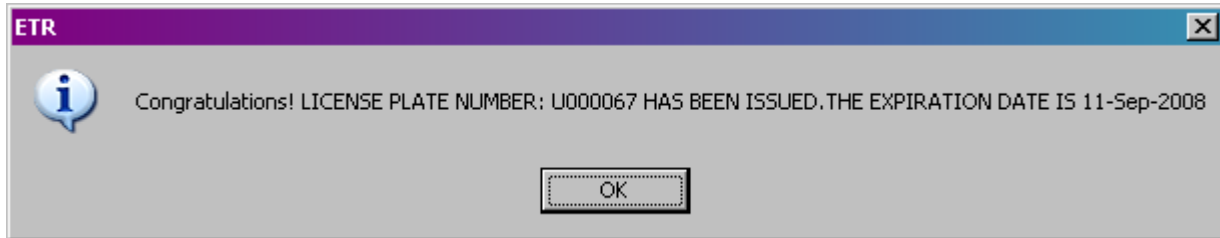
Select Insurance Company

Search Code: [input] Search Name: [input] Search

Code	Name
3685	21ST CENTURY INS. CO. OF CALIFORNIA, INC
1915	ACCELERATION NATIONAL INS. CO.
2926	ACCEPTANCE INDEMNITY INS CO
37958	ACCEPTANCE INS. CO. SL
9293	ACCESS INSURANCE COMPANY
9005	ACCREDITED SURETY AND CAS.CO.
9271	ACE AMERICAN INS. CO.
9270	ACE EMPLOYERS INS. CO.
1006	ACE FIRE UNDERWRITERS INS. CO.
1900	ACE INDEMNITY INS. CO.
1005	ACE PROPERTY & CASUALTY INS. CO.
2946	ACIG INSURANCE COMPANY
9567	ACSTAR INS. CO.
9733	ACUITY, A MUTUAL INSURANCE COMPANY
3523	ADDISON INSURANCE COMPANY

Select Cancel

- e. **Temporary Tag Information Section** – In this section the user will let the system know if the tag to be printed is the 'On Demand' version of the temporary tag, or if a 'Pre-printed' temporary tag will be used. When using the Print-On-Demand option, the user will be required to provide a Control Number that conforms to the requirements of the Florida DHSMV. When using the Pre-printed Temporary Tag option, you will be required to provide a License Plate Number that conforms to the requirements of the Florida DHSMV.
6. When the user has completed and submitted the Secondary Issue ETR screen and the Florida DHSMV accepts the information you have provided, a success message is returned from the system with information related to the transaction in the message. Below is one variation of this success screen.



7. After receiving the successful message, the next steps would be to print the Temporary Tag and print the Temporary Registration papers.
8. **Voiding ETR** – Should the need arise to Void an existing ETR a user must do so within the same business day as the original successful request. By selecting Void ETR from the ETR menu, the system will void the last issued ETR for this vehicle and will report this to the user when the action has completed. If the last successful ETR transaction took place prior to the current business day, the system will return an error instructing the user that only ETR transactions for the current day may be voided.
9. **ETR History** – This is where a history of all the ETR transactions performed in DeskManager for this dealership can be found for review. The data seen on this list is not specific to the deal currently open or the vehicle related to this deal, but is a list of all successful ETR requests and all ETR requests that were successfully voided.