

Using DeskManager's ePay Forms

As of November 2010, AutoManager is releasing the ePay form system in the DeskManager software. ePay forms are versions of popular copyrighted plain paper forms that can be printed on any printer – laser, inkjet or dot-matrix – and do not require the pre-printed form to be passed through the printer. Due to the nature of the copyrights on these forms, they must be 'purchased' for printing through electronic means.

These forms will be designated in the forms Library with a 'Yes' in the ePay column. Users will select these forms the same way as other forms are selected by marking the box to the left and clicking the Save Changes option. Users will then find these forms on their Selected Forms list along with any other forms that have been selected from the library.

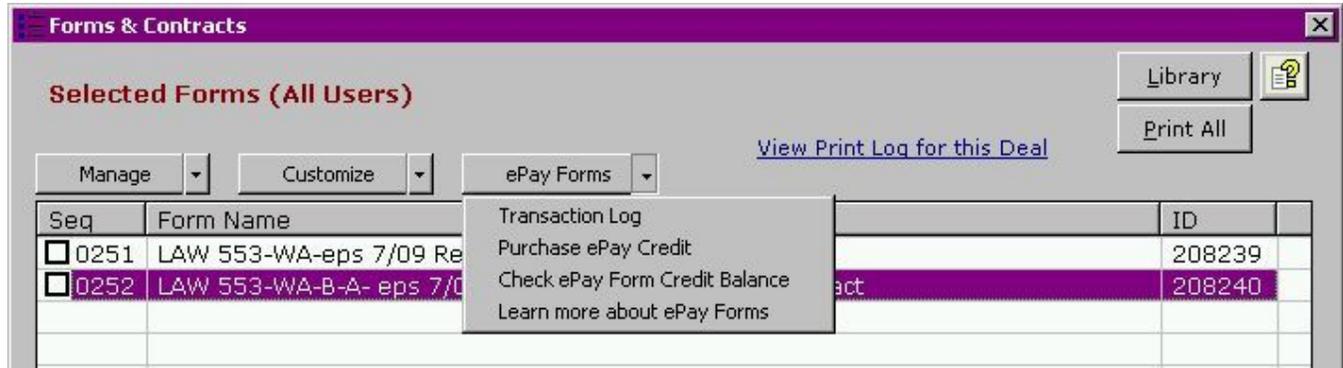
Users will continue to create their deals in the same way as they have previously. There will be an extra step in the printing process where the user will be informed of the charge for printing the form for that deal and their current account balance. An active internet connection is required for this process. The form printing charges are per deal. After the initial charge for a deal, users can print the form as many times as they need for that same deal without any further charges as long as they do not change the vehicle or customer information in that deal.

Before getting to the process of printing the ePay forms, 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 registration credits in advance and they will be deducted from the dealer's account as they use the ePay system. All electronic transactions will be handled through a new service known as AutoManager LIVE!

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. Stay informed on all the tools AutoManager provides to help run a successful dealership by visiting <http://www.automanager.com>.

Brief overview of the ePay Forms menu in DeskManager

Below we have an example of a Selected Forms list found by clicking the Forms button inside a deal. By clicking on the ePay Forms button the user can access the menu that will allow them to get started using the ePay form system. The menu options are described following the screen shot.



ePay Forms Menu

Transaction Log

Clicking on this option will bring up a history of charges related to the currently open deal the user is viewing in DeskManager. This will include information such as the DeskManager account number of the deal, the name of the user that was logged into DeskManager at the time the item was printed, the date and time the purchase request was placed, information about the customer (first and last name and/or company name), the DeskManager stock number of the vehicle, the VIN, year, make, model of the vehicle, the term of the loan and the amount financed in the deal.

Purchase ePay Credit

This will take the user to a secure page on the AutoManager LIVE! system where they will be able to review their balance and purchase additional credits in the system. The minimum credit purchase is 100.00 and this amount can be increased in increments of \$50.00 if desired. As mentioned, this is a secure page and it is able to perform credit card transactions should the dealer need to add credit to their ePay account.

Check ePay Form Credit Balance

This will take the user to a secure page on the AutoManager LIVE! system where they will be able to review their balance and purchase additional credits in the system.

Learn more about ePay Forms

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

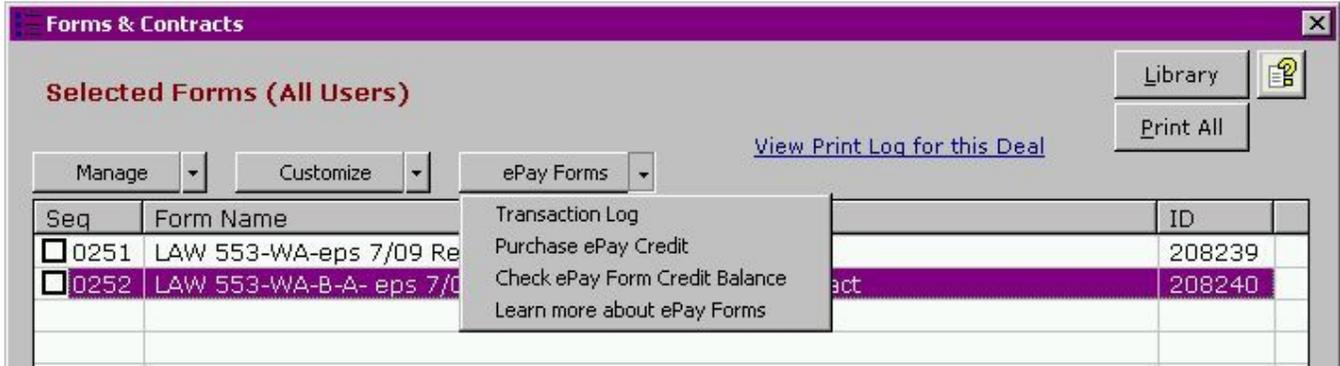
Before you start using ePay Forms, you need to do a couple things to get prepared:

1. Update your DeskManager program to be sure you have the latest forms library. This is done by clicking on the Support menu and selecting Update DeskManager. After the updated files have been downloaded to the system, the user will see a congratulations message. After clearing this message, have everyone exit from DeskManager and then have one user launch the program. This will unpack the update and apply the changes as well as update the forms library with any new forms available. Once this user has reached the Login screen all other users can access DeskManager as needed.
2. Prepay for a number of ePay Forms transactions you expect to be issuing. AutoManager requires prepayment for ePay Forms transactions to simplify the process and keep the pricing for each transaction as low as it is. To prepay for these transactions make sure you have an active internet connection. Choose the "Purchase ePay Forms Credit" option from the ePay Forms menu. This menu is found at the top of the Selected Forms list inside any deal. The system will guide you through the steps for paying by credit card.

Getting Started with ePay Forms

How to purchase ePay Form Credits in DeskManager

Because this is a prepaid system for the printing of ePay Forms, 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 click on the Forms button to open the Selected Forms list. From inside the Selected Forms List, find and click on the **ePay Forms** button. This will display the following menu:



ePay Forms Menu

Select the option **Purchase ePay Credit**. This will bring you to an AutoManager LIVE! Secure web page that will display the current credit balance on your account. Clicking on Make Payment will take you to a screen 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

Add to Electronic Transaction Prepayment Balance

Amount: \$ 100.00

Payment Receipt *optional

E-mail Address: You@YourCompanyNameHere.com

If provided, a receipt for your payment will be sent to you within one business day.

Credit Card Details *all fields are required

Card Type: VISA MasterCard Discover American Express

Card Number:

Expiration: 01 / 2010

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

Full Name: Your Name
as it appears on card

Street Address: 12345 Your Address St
of card billing address

Zip/Postal Code: 90001
of card billing address

Process Payment »

[Return to Balance without making payment](#)

Purchase ePay Forms Credit

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 ePay Forms Credit balance

From the **ePay Forms** menu select the 'Check ePay Form Credit Balance' option. This will take the user to a secure web page on the AutoManager LIVE! server where the dealership's ePay Form 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 begin from the same AutoManager LIVE! page.



The screenshot displays a web interface for checking the ePay Form Credit Balance. At the top, a blue header reads "Electronic Transaction Prepayment Balance". Below this, a large box contains the text "Available Balance:" followed by the amount "\$91.50" in a large green font. A green button with the text "Make Payment »" is positioned below the balance. At the bottom of the page, the "Client ID" is listed as "012309" in green, and the "Last Payment" is listed as "N/A" in red. Below the Client ID, the company name "Your Company Name Here" and address "Los Angeles, CA 90025" are displayed in a smaller font.

ePay Form Credit Balance

Selecting ePay Forms for use in a Deal

To begin, the user must open the Forms Library from within DeskManager. This can be done by using the DeskManager Setup tool, or by opening the Selected Forms list from within a deal. The DeskManager Setup tool can be found by clicking on the File menu then selecting the Setup option. Once the setup tool is open, scroll down the left side menu, find and click on Forms and this will open the Forms Library. From inside a deal, click on the Forms button to open the Selected Forms list, then in the upper right corner of the list, find and click on the Library button. Below is an example of the forms library window.

Forms Library

WA Local Forms & Contracts

Filter Plain Paper Forms

[WA Inventory Forms](#)
[WA Local Forms & Contracts](#)
[Warranty & Service Contracts](#)
[Buyer's Guides](#)
[Preview Selected Form](#)

Seq	Form Name	ePay	File/Format	ID
<input type="checkbox"/> 235	AlaskaUSA-Retail Installment Sales Contract AKUSA 02336 Rev 09/14/09		WA27699 () ()	207654
<input type="checkbox"/> 236	Vehicle Certificate of Ownership (Title) Application TD-420-001 Rev 8/09		WA87883 () (101...	207669
<input type="checkbox"/> 237	Odometer Disclosure/Title* Extension Statement TD 420-006 (R/4/08) Sale [PM]		WA30941 () ()	207745
<input type="checkbox"/> 238	Odometer Disclosure/Title* Extension Statement TD 420-006 (R/4/08) Trade [PM]		WA6050 () ()	207746
<input type="checkbox"/> 239	Standard Vehicle Purchase Order Form RS #4 [PM]		WA15352 () ()	207760
<input type="checkbox"/> 240	Release of Interest/Power of Attorney TD-420-050 (R/3/10)W		WA44576 (PDF) ()	207969
<input type="checkbox"/> 241	LAW BO-WA 6/09 Vehicle Buyers Order		WA67544 () ()	207999
<input type="checkbox"/> 242	Retail Installment Contract Washington Consumer Paper 6-12-10		WA70317 () ()	208134
<input type="checkbox"/> 243	Release of Interest/Power of Attorney TD-420-050 (R/3/10)W TRADE VERSION		WA78301 (PDF) ()	208156
<input type="checkbox"/> 244	Vehicle Dealer Temp Permit TD-420-005 Rev 9/07 (Finance Company Display)		WA66711 () (100...	208195
<input type="checkbox"/> 245	Vehicle Certificate of Ownership (Title) Application TD-420-001 Rev 8/09 (Finance Comp...		WA19055 () (101...	208196
<input type="checkbox"/> 246	Due Bill - WSIADA Seattle		WA45438 () (101...	208204
<input type="checkbox"/> 247	Retail Installment Contract Washington Reliable Credit Association Inc. 6-12-10		WA78511 () ()	208205
<input type="checkbox"/> 248	Release of Interest/Power of Attorney TD-420-050 Trade (R/3/10)W		WA97603 (PDF) ()	208220
<input type="checkbox"/> 249	Asis We Owe Implied Warranty PDF (EBAB)		WA15982 (PDF) ()	208221
<input type="checkbox"/> 250	Global Credit Union Conditional Sale Contract and Security Agreement - 10/08		WA13088 () ()	208228
<input checked="" type="checkbox"/> 251	LAW 553-WA-eps 7/09 Retail Installment Sale Contract	Yes	WA62128 (PDF) ()	208239
<input checked="" type="checkbox"/> 252	LAW 553-WA-B-A- eps 7/09 Retail Installment Sale Contract	Yes	WA78826 (PDF) ()	208240
<input type="checkbox"/> 254	Implied Warranty Negotiation Statement Form #15 Rev. 3/02		WA39919 () ()	208258

[Save & Continue](#) Checked items represent Selected Forms. They will appear in your Selected Forms List

Example of the Forms Library

Notice in the forms library there is now an extra column for ePay. If a form is an ePay form, you will see the word 'Yes' in this column. Select these forms the same as any other form by marking the box to the left and then selecting one of the save options (Save & Continue link in the lower left or Save & Exit button in the upper right). These forms will then appear on the Selected Forms list.

Forms & Contracts

Selected Forms (All Users)

Seq	Form Name	ID
<input type="checkbox"/> 0251	LAW 553-WA-eps 7/09 Retail Installment Sale Contract	208239
<input checked="" type="checkbox"/> 0252	LAW 553-WA-B-A- eps 7/09 Retail Installment Sale Contract	208240

ePay Forms on Selected Forms List

Printing ePay Forms in a Deal

ePay forms will be printed just like any other form in DeskManager. Open the deal to be printed, click on the Forms button and from the selected forms list double click the desired form. DeskManager will open a preview of the form with the data from the deal filled into the appropriate fields on the form. Review the form as necessary and when ready, click the print button at the top of the page.

System Overlay Form

0 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21

LAW[®] 553-WA-eps 7109

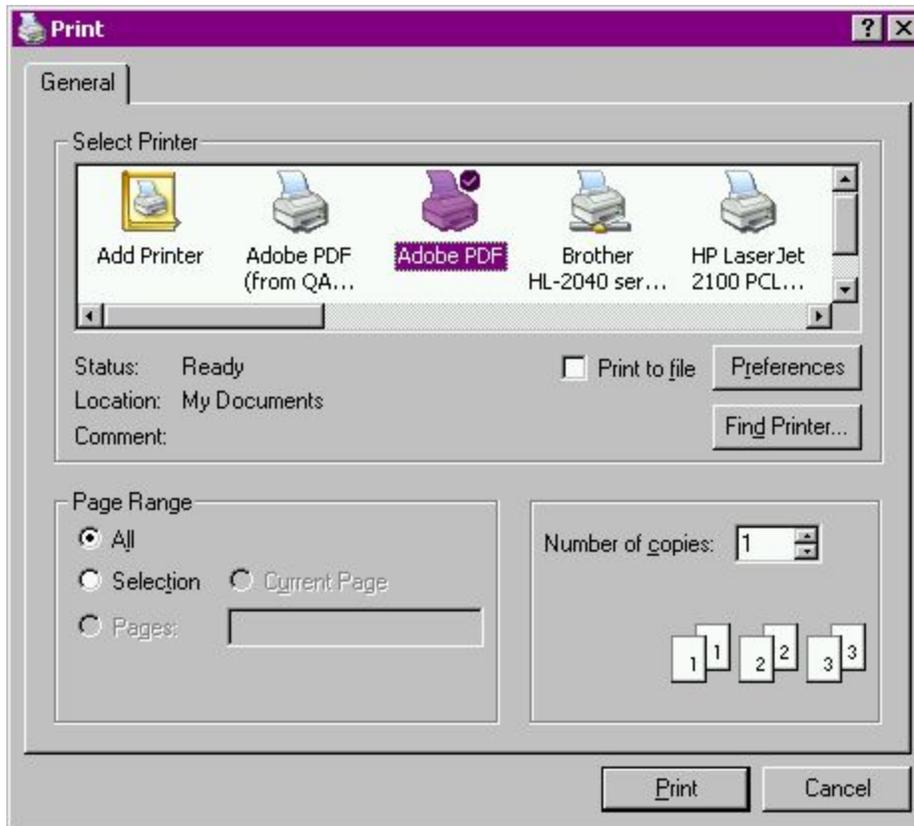
RETAIL INSTALLMENT SALE CONTRACT
SIMPLE FINANCE CHARGE

Dealer Number _____ Contract Number _____

Buyer Name and Address (Including County and Zip Code)	Co-Buyer Name and Address (Including County and Zip Code)	Creditor-Seller (Name and Address)
RACHEL ANNE SUMMERS 1280 BEACON ST BROOKLINE MA 02446		YOUR COMPANY NAME HERE 123 MAIN STREET

Preview of Example Form

When the user clicks on the Print button at the top of the preview window, the system will prompt the user with an ePay Form Transaction Fees window that will display the charge for the current form, the dealer's account balance and a note reminding the user that they will only be charged one time for printing this form for this deal (should the form need to be printed again) as long as the vehicle and customer information remain unchanged. The system will wait for the user to confirm or cancel the charges. **After confirming the charges there is no way to reverse the process and void the charge**, so please be absolutely sure you have all the correct information in your deal for both the customer and the vehicle involved. The system will then present you with a standard Windows printer selection window to allow you to direct the form to the desired printer and if necessary select the number of copies to be printed.



Printer and Copies selection

Repeat the process as necessary for any other deals.

As mentioned before, once you are charged for printing the form in a deal, you will be allowed to print that form as many times as necessary for that same deal, **as long as the Vehicle and Customer information remain unchanged.**