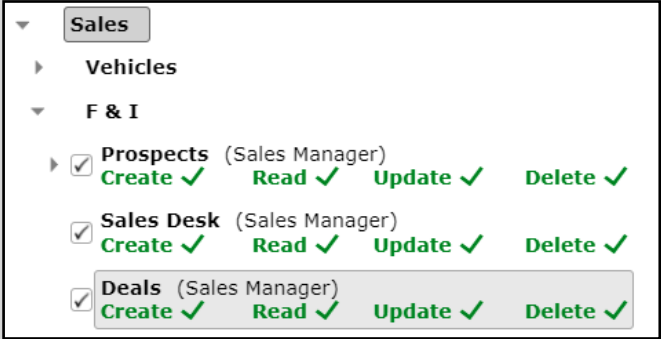# VUE ∨ DMS

The Dealer's Cloud-Native DMS

OverVUE

VinSolutions is a CRM tool that manages vehicle and customer info. Depending on the level of subscription, you may also have the option to push deals from VinSolutions into VUE.

Permissions

In order to have the ability to import a Deal, users must have their permissions set to create Prospects, Customers, and Deals in VUE.

VUE Support needs your dealership's VinSolutions credentials in order to activate the deal Import tool in VUE.

▼ Sales

▶ Vehicles

▼ F & I

▶ ☑ **Prospects** (Sales Manager)
Create ✓   Read ✓   Update ✓   Delete ✓

☑ **Sales Desk** (Sales Manager)
Create ✓   Read ✓   Update ✓   Delete ✓

☑ **Deals** (Sales Manager)
Create ✓   Read ✓   Update ✓   Delete ✓

Deal Import Process

1. Navigate to Sales > F&I > Deals

2. Click on the [**Deal Import**] button in the Action Ribbon.

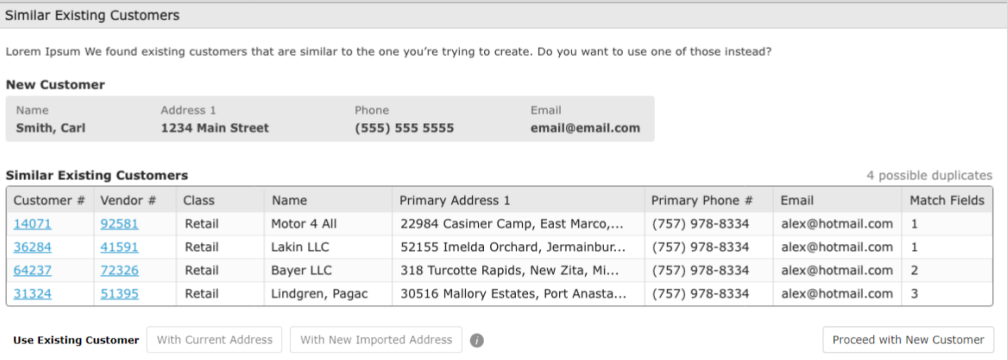**Deal Import**
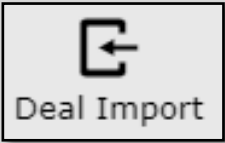
3. Input the VinSolutions deal number then click the [**Import**] button to create a new Sales Desk in VUE.

VinSolutions   ✕

VinSolutions deal #

[   ]

                              Import   Cancel

4. The Similar Existing Customers window presents mismatches between the data in VUE and the data in VinSolutions.

- Click on the line of the data you want to import into VUE.

5. Click either the Use Existing Customer [**With current Address**] or [**With New Imported Address**] button, or the [**Proceed with New Customer**] button to continue.

Similar Existing Customers

Lorem Ipsum We found existing customers that are similar to the one you're trying to create. Do you want to use one of those instead?

New Customer

Name	Address 1	Phone	Email
Smith, Carl	1234 Main Street	(555) 555 5555	email@email.com

Similar Existing Customers   4 possible duplicates

Customer #	Vendor #	Class	Name	Primary Address 1	Primary Phone #	Email	Match Fields
14071	92581	Retail	Motor 4 All	22984 Casimer Camp, East Marco,...	(757) 978-8334	alex@hotmail.com	1
36284	41591	Retail	Lakin LLC	52155 Imelda Orchard, Jermainbur...	(757) 978-8334	alex@hotmail.com	1
64237	72326	Retail	Bayer LLC	318 Turcotte Rapids, New Zita, Mi...	(757) 978-8334	alex@hotmail.com	2
31324	51395	Retail	Lindgren, Pagac	30516 Mallory Estates, Port Anasta...	(757) 978-8334	alex@hotmail.com	3

Use Existing Customer [With Current Address] [With New Imported Address] ⓘ   [Proceed with New Customer]

VinSolutions

Process - Resolving Conflicts

When data fields in VUE do not match the data fields in VinSolutions, a Deal Import Conflicts window opens.

Select the correct data on each page and click the [**Next**] button to advance to the next conflict page. Click [**Previous**] to go back and review.

1. General
   - Mileage
   - MSRP
   - Lender

2. Aftermarket
   - VUE Code
   - Description
   - Price
   - Cost

3. Accessory
   - VUE Code
   - Description
   - Price
   - Cost

Selecting the [**Dismiss all Conflicts**] button imports the default selections including any existing $0.00 values.

Unresolved conflicts will not be imported. Click the **go back and review your steps** link or click the [**Import Deal with Resolved Conflicts**] button to Import now.

Once the customer data is imported, the Sales Desk window opens and the deal can be worked in VUE as usual.

Setting up VinSolutions

The code in VinSolutions must match the code in VUE for each product being imported into VUE. Add or edit the VinSolutions code as needed.

The codes are in VUE > Sales > Maintenance > Sales
- Service Contracts
- Insurance
- Products
- Fees

CRM	Inventory	**Desking**	Communications	Campaigns	Websites	VinLens	Insights

Desking   Desking Settings

Desking Settings

Main

☐ Default Lease Paid At Inception

Printing

＋ Add new record   ↻ Refresh

Accessories

		Name	Code	Amount	Cost	Default	
Service Contracts	✎	OSI	OSIC	$2,500.00	$0.00	☐	✕
GAP	✎	SG-TW	SGTW	$695.00	$0.00	☐	✕
Proc/Doc Fees	✎	SGUVP	SGUVP	$995.00	$0.00	☐	✕
Gov't License Fees							

Navigate to VinSolutions Connect Home Page. On the Desking tab, look for the following tabs on the left:

- Accessories: The code must read AFTMKT, OR the CODE from VUE for that Aftermarket.
  - Ex: Name = Bedliner, if there isn't an aftermarket in VUE that reads BEDLINER, the code will be AFTMKT.
- Service Contracts: The code must read what VUE has for that Service Contract.
  - Ex: Name = SG-TW , the code in VUE is SGTW, therefore the CODE in VinSolutions must be SGTW.
- Gap: The code must read what VUE has for GAP.
  - Ex: Name = OSGAP, the code in VUE is OSGAP, therefore the CODE in VS must be OSGAP.
- Doc: The code must read what VUE has for the DOC Fee.
  - Ex: Name = Delivery Fee, the code in VUE is DOC, therefore the CODE in VS must be DOC.
- Fees: the code must read what VUE has for the Fees.
  - Ex: Name = MS Fees, the code in VUE is TTL, therefore the CODE in VS must be TTL.
- Rebates: The code must read what VUE has for the Rebates.
  - Ex: Name = GM Rebate, the code in VUE is REBATE, therefore the CODE in VS must be REBATE.

 NOTE: If there are multiple rebates in VinSolutions, if you only have one code for rebates in VUE, all rebates in VinSolutions must use the one code in order to match "REBATE" in VUE.

Adding a CODE in VinSolutions for the Deal Import Wizard

Navigate to VinSolutions Connect Home Page > Desking Tab > Desking Settings

Accessories - The Code column in VinSolutions must match the Code in VUE.

1. Aftermarkets and We-Owes are listed in the Accessories Tab.

   - Aftermarkets may have separate Names for each Aftermarket items in VinSolution. The Code in VinSolutions' Code column must read AFTMKT to be recognized by VUE.

   - For example: If the Name in VinSolutions = Bedliner, the Code must be AFTMKT.

2. WEOWEs are similar to AFTMKT.
   - For example: If the Name in VinSolutions = Floormats, the Code must be WEOWE.

VinSolutions

DOC Fee

1. The Doc Fee is listed on the Proc/Doc Fees tab.
2. [Add] or [Edit] as needed.
3. No matter what the name is in VinSolutions, the code must read what VUE has for the DOC Fee. For example: Name = Delivery Fee, and the code in VUE is DOC, therefore the CODE in VinSolutions must be DOC.

| CRM | Inventory | **Desking** | Communications | Campaigns | Websites | VinLens | Insights |

Desking   Desking Settings

Desking Settings

☐ Default Lease Paid At Inception   Proc/Doc Fees Label: Proc/Doc Fees

+ Add new record   ↻ Refresh

	Name	Code	Amount	Default	Inv. Type	Deal Type	
✎	Delivery Fee	DOC	$390.00	☑	All Vehicles	All	✕

- Main
- Printing
- Accessories
- Service Contracts
- GAP
- Proc/Doc Fees

Fees

1. Fees (other than DOC Fees) are listed in the Gov't License Fees tab.
2. [Add] or [Edit] as needed.
3. No matter what the name is in VinSolutions, the code must read what VUE has for the Fees. For example: If the name in VinSolutions = MS Fees, the code in VUE is TTL, therefore the CODE in VinSolutions must be TTL.

Desking   Desking Settings

Desking Settings

☐ Default Lease Paid At Inception   Government Fees Label: Government Fees

+ Add new record   ↻ Refresh

	Name	Code	Amount	Default	Inv. Type	Deal Type	
✎	MS Fees	TTL	$10.00	☐	All Vehicles	All	✕
✎	Out of State Fees	DRIVEOUTFE	$7.50	☐	All Vehicles	All	✕
✎	ACQ	ACQ	$595.00	☐	All Vehicles	Lease	✕

- Main
- Printing
- Accessories
- Service Contracts
- GAP
- Proc/Doc Fees
- Gov't License Fees
- Rebates
- Purchase Tax

VinSolutions

Frequently Asked Questions

Who makes these adjustments?

The dealer should make these adjustments. Assistance can be provided by VUE Support, but the dealer needs to make the adjustments themselves.

What should I go by to make sure they match?

The dealer should pull up VUE and go to the corresponding Maintenance Setups as a guide to making these adjustments.

When should this be done?

This should be done prior to the dealer being activated for the Import Wizard.

What if VINSolutions only has some of the items in VUE?

For the most efficient use of the Wizard, the dealer should add any they don't have in VINSolutions.

What if we have our Lic and TTL fees combined in VINSolutions?

These need to be separated in VinSolutions to match VUE. You will need to add a new fee and adjust the other one.