



## SEcureMetrics 2.0 F&I Performance Reporting

### High Level Overview



# What is SEcureMetrics?

- A web-based performance reporting solution developed and fully supported by StoneEagle for Dealers and Dealer Groups to track F&I aftermarket production, sales and inventory.
- Delivers various daily, monthly and annual reports that are generated dynamically from data that resides within the Dealership Management System (DMS).
- DMS Integration eliminates manual data entry, reduces errors and enables a Dealer or Dealer Group to monitor performance on a consistent basis.
- SEcureMetrics is accessed through a secure web portal and is only available to authorized users within the dealership or dealer group.
- Collects, processes and displays the data needed for a Dealer or Dealer Group to pinpoint productivity and make informed management decisions.



- Dealer Management System Integration Eliminates Duplicate Data Entry and Automates the F&I Reporting Process.
- Monitor Performance with Daily, Weekly, Monthly, and Annual Reports.
- Track Dealer, Dealer Group and Individual Employee Performance through a Flexible and Robust Web Portal.
- Establish Goals and Objectives to Immediately Identify Strengths and Weaknesses of Dealership or Dealer Group.
- Deliver Reports Automatically via Email on a Scheduled Basis.
- Filter, Sort and Group Data Against Established Benchmarks.
- Generate Charts and Graphs to Illustrate Productivity.
- Export Data to PDF or Excel with Ease.



Select **Daily, Monthly, Yearly** or **Dealer Comparison Report Summaries** from the simple to use “**Reports Menu**”



Deal Number  Choose a Dealership...  Logged in as: JASON GILLETTE (JGDEMO)

### Reports Menu

- SEcureMetrics
  - Daily
  - Monthly
    - Cash Down Breakdown Report
    - Discrepancies Issues
    - F&I Summary
    - Finance Profit Breakdown Report
    - Finance Report
    - Heat Sheet
    - Inventory Report - by Models
    - Inventory Report - Car Listing
    - Lender Report
    - Log
    - Penetration by Age/Gender/ZIP
    - Rate Spread Breakdown Report
    - Trade Status
    - Year to Date Report
  - Yearly
    - Trend Comparison
    - Trend Forecast
  - DCR
    - Summary
      - Dealership
      - Finance Manager
      - Make
      - Sales Manager
      - Sales Person
      - Salesman
      - Salesman w/Splits
- Recent Reports

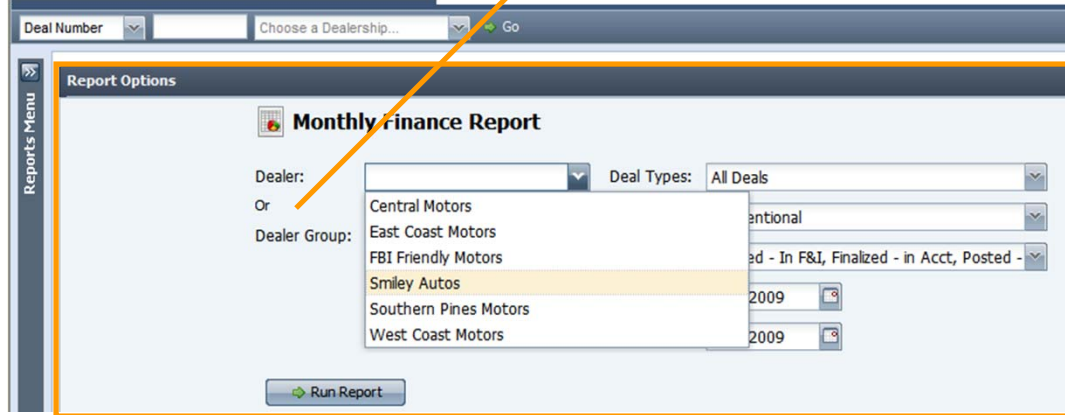
### About SEcureMetrics

SEcureMetrics is a totally automated sales and F&I reporting program for franchise automotive retailers and organizations that specialize in providing finance and insurance related products and services. SEcureMetrics allows the user to focus on reports by department, finance manager, sales manager, sales person, even by make and model.

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Select a **Single Dealer or Dealer Group** from the Drop Down Menu



Deal Number: [ ] Choose a Dealership... [Go]

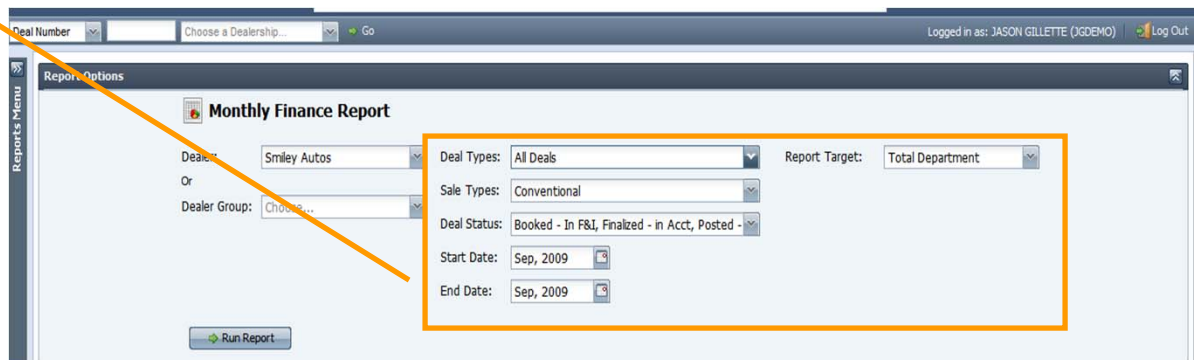
**Report Options**

**Monthly Finance Report**

Dealer: [ ] Or Dealer Group: [Smiley Autos] Deal Types: All Deals [ ] Sale Types: Conventional [ ] Deal Status: Booked - In F&I, Finalized - in Acct, Posted - [ ] Start Date: Sep, 2009 [ ] End Date: Sep, 2009 [ ]

[Run Report]

Select **Deal Type, Sale Type, Deal Status, Report Target and Date Range**.



Deal Number: [ ] Choose a Dealership... [Go] Logged in as: JASON GILLETTE (JGDEMO) [Log Out]

**Report Options**

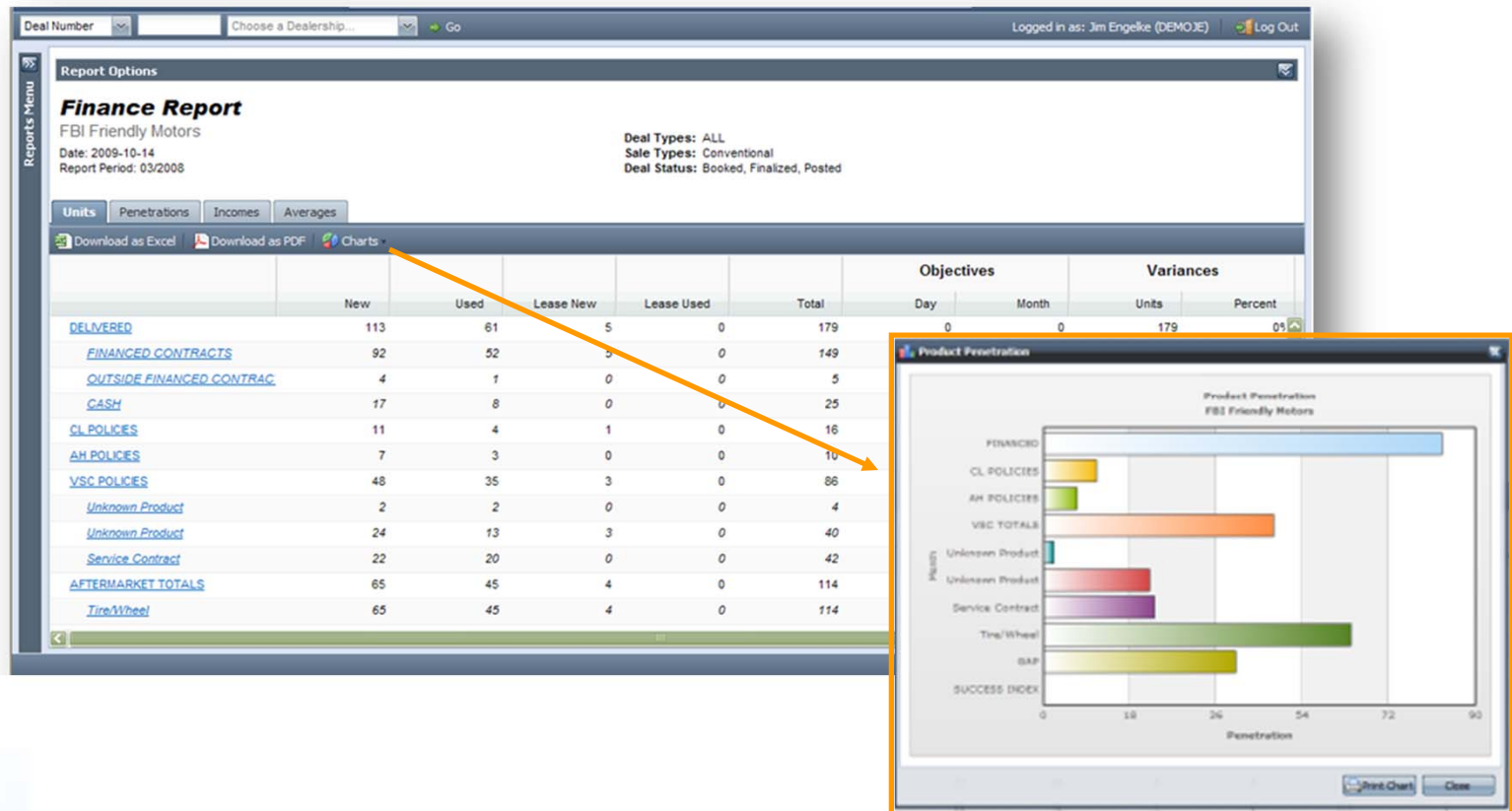
**Monthly Finance Report**

Dealer: [Smiley Autos] Or Dealer Group: [Choose...] Deal Types: All Deals [ ] Report Target: Total Department [ ] Sale Types: Conventional [ ] Deal Status: Booked - In F&I, Finalized - in Acct, Posted - [ ] Start Date: Sep, 2009 [ ] End Date: Sep, 2009 [ ]

[Run Report]



A consolidated report that **details the units sold, F&I penetrations, Incomes from various sources, and profit averages** (“per copy” figures) for the dealership.



**Drill Down** into Hyperlinks for **Specific Deal Details**.  
**Generate Pie and Bar Charts** for Consolidated Snapshots.

View all details of an individual deal including gross incomes, products sold, finance information, employees involved in the transaction, vehicle info, etc.

Deal Number: [ ] Choose a Dealership... [ ] Go

Logged in as: Jim Engleke (DEMO) [ ] Log Out

Monthly Log >> 98493 - CUSTOMER NAME

**Deal #98493 - CUSTOMER NAME**

Deal Number: 98493	Front Gross: \$18.99	<b>Vehicle</b> Stock Number: 15950 Year/Make/Model: 2008 HONDA ACCORD SED Odometer: 25 VIN: JHMCP26788C041493
Buyer Name: CUSTOMER NAME	F&I Gross: \$2,384.00	
Deal Category: FC / Finance Contract	Total Gross: \$2,402.99	
Contract Date: 02292008	Document Fee: \$0.00	
Deal Type: N / New	Rebate: \$0.00	
Deal Status: I / Finalized	Cash Down: \$2,500.00	<b>Employees</b> Sales Person 1: SALEPER C Sales Person 2: Sales Manager: SALEMGR A Finance Manager: FINMGR A
Sale Type: C / Conventional		

**Financing - BANK NAME C**

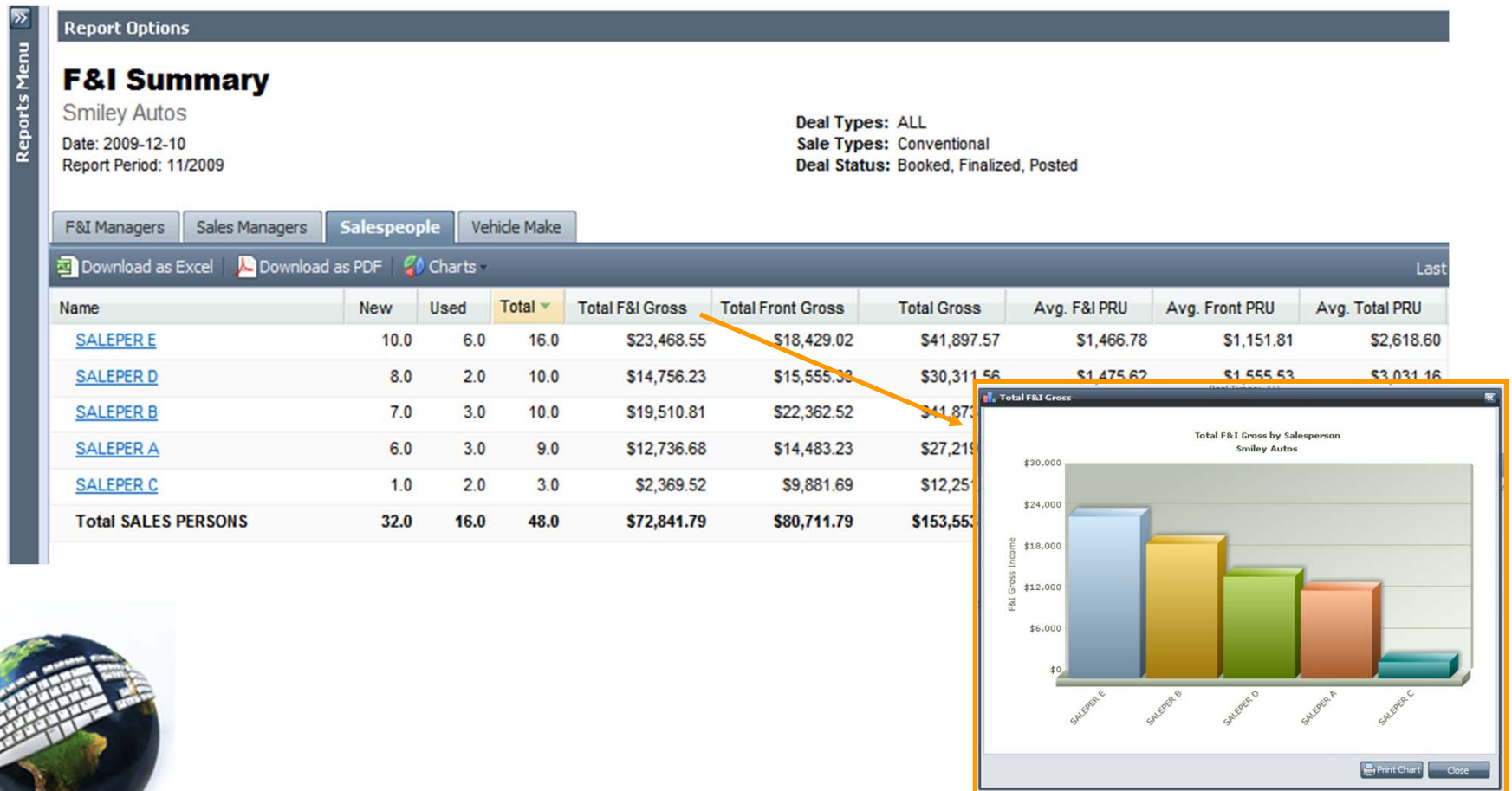
Buy Rate: 6.69    Sell Rate: 8.39    Term: 72    Amount Financed: \$25,430.02    Finance Reserve: \$1,134.00    Monthly Payment: \$450.94

**F&I Products**

Category	Vendor	Product	Months	Miles	Deductible	Premium	Cost	Commission
GAP		GAP	0	0	0	\$495.00	\$220.00	\$275.00
AFTERMARKET		Tire/Wheel	0	0	0	\$299.00	\$199.00	\$100.00
VSC	Warranty3	Service Contract	0	0	0	\$1,695.00	\$820.00	\$875.00
		Total VSC	0	0	0	\$1,695.00	\$820.00	\$875.00

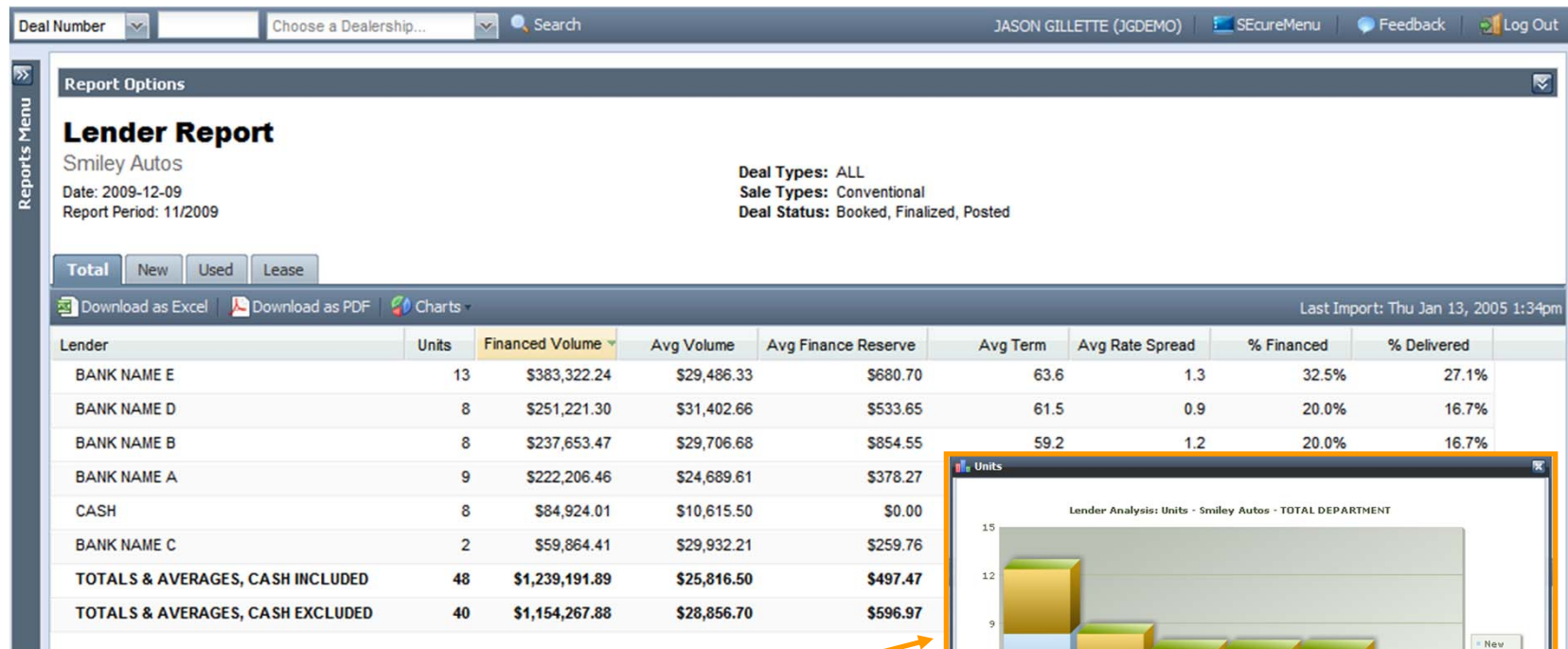
# Sample F&I Summary Report

A snapshot **isolating F&I Managers, Sales Managers, Salespeople, and Vehicle Make**. Graphically illustrate Employee Performance and Drill Down into each Employee to access their Detailed Monthly Log.





Evaluate buying percentages of each Lender (Captive, Community Bank and Credit Union) graphically illustrate the lenders that are buying / not buying.



Graphically Illustrate Buying vs Non-Buying Lenders.

# Sample Dealer Summary Report

Aggregate all stores within a Dealer Group regardless of DMS type. Immediately sort or filter data by clicking any header within the report.

Deal Number  Choose a Dealership...  Logged in as: JASON GILLETTE (JGDEMO)

**Report Options**

**Summary by Dealership**  
BIG GROUP Group - Total Department  
Date: 2009-10-26  
Report Period: 09/2009

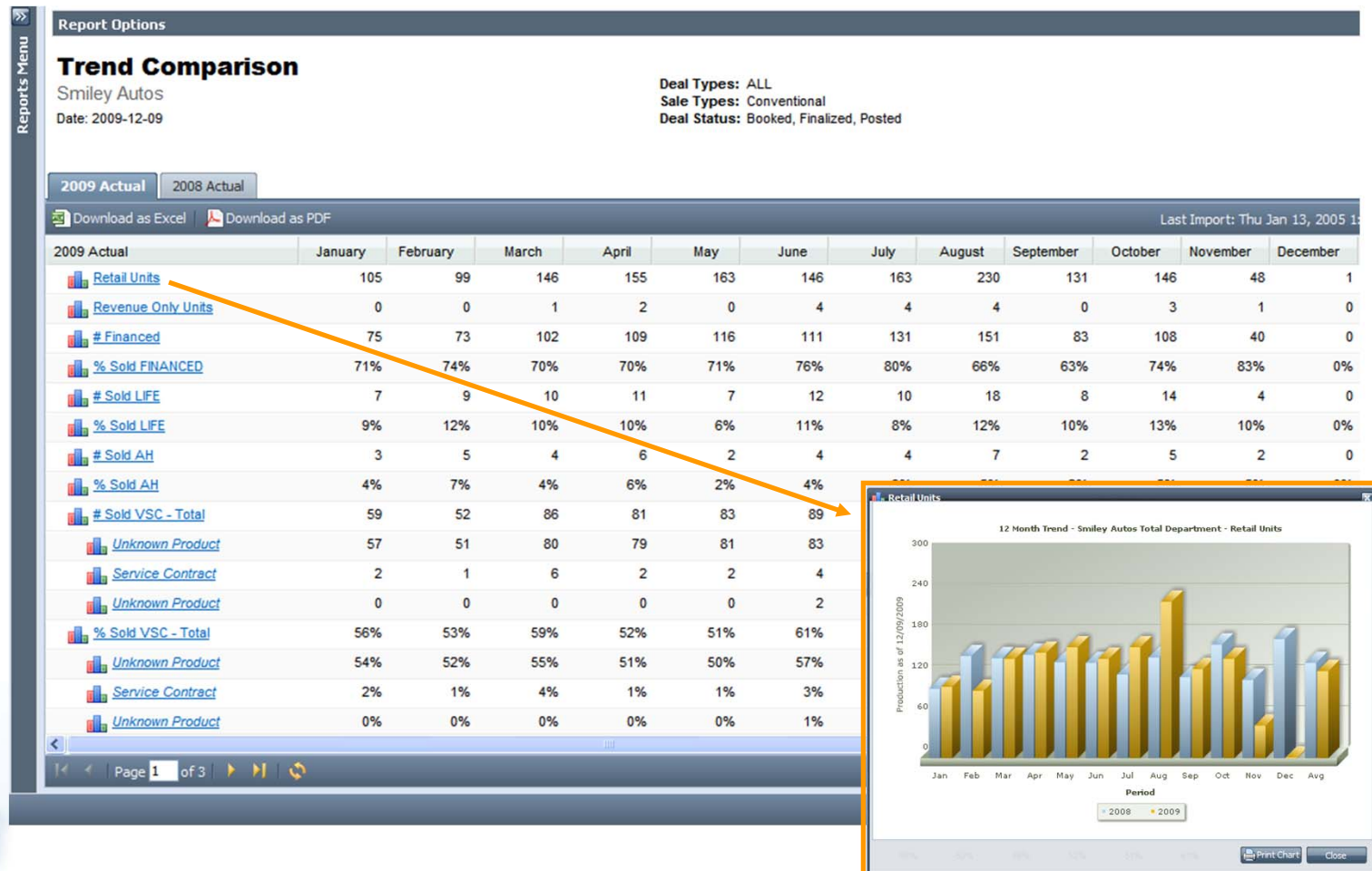
Deal Types: ALL  
Sale Types: Conventional  
Deal Status: Booked, Finalized, Posted

Name	Retail Units			Financed De...	VSC	GAP	AFTERMARK...	Credit Life Po...	Accident and...	F&I Income	
	New	Used	Total							Total	PRU
Smiley Autos	58	67	125	\$40,739.00	\$45,914.00	\$11,774.00	\$903.00	\$5,095.00	\$2,299.00	\$106,723.36	\$853.79
West Coast Motors	53	34	87	\$29,390.00	\$38,739.00	\$14,347.00					
Southern Pines Motors	27	43	70	\$32,544.00	\$24,432.00	\$11,235.00					
Central Motors	27	30	57	\$27,008.00	\$14,879.00	\$3,970.00					
East Coast Motors	24	24	48	\$21,690.00	\$22,599.00	\$6,599.00					
FBI Friendly Motors	22	15	37	\$9,244.00	\$19,855.00	\$5,650.00					
<b>GRAND TOTALS</b>	<b>211</b>	<b>213</b>	<b>424</b>	<b>\$160,615.00</b>	<b>\$166,417.00</b>	<b>\$53,575.00</b>					



# Sample Trend Comparison Report

Analyzes data for multiple months and compares the data against a previous year's business. **Drill Down** into Hyperlinks to **Generate Charts for Year Over Year Comparisons**.







# Thank You!

[www.stoneeagle.com](http://www.stoneeagle.com)

**Questions?**

**Contact StoneEagle Sales Division**

**1-800-854-1567**

