

F&I product presentation

Automatically customizes and presents F&I products to customers based on their vehicle purchase, credit profile, and preferences to maximize product attachment rates and increase per-deal profit.

Download PDF

Get Your Blueprint

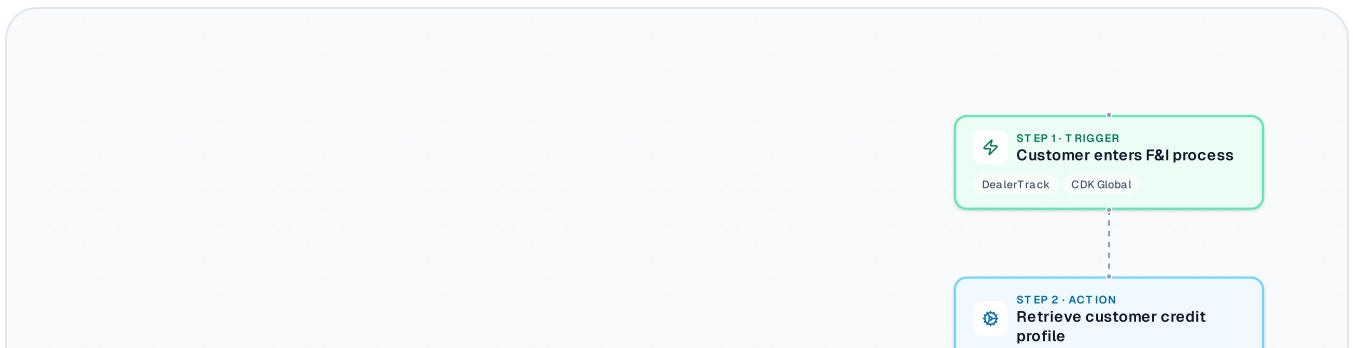


WORKFLOW TRIGGER

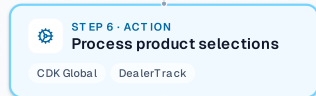
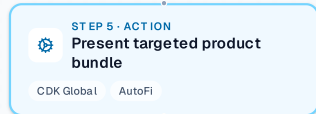
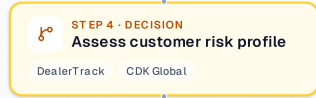
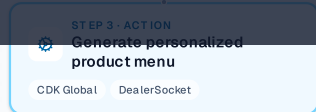
Customer completes vehicle financing approval and enters F&I office

Visual Flow

Each node represents an automated step. Connections show how data and decisions move through the workflow.



DealerTrack AutoFI



Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

Customer enters F&I process

Customer's financing is approved and they are ready for F&I product presentation. System captures customer and vehicle details from the deal jacket.

DealerTrack

CDK Global

2

 ACTION

Retrieve customer credit profile

Pull customer's credit score, payment history, and financing terms to determine appropriate product recommendations and pricing tiers.

DealerTrack

AutoFi

3

 ACTION

Generate personalized product menu

Create customized F&I product presentation based on vehicle type, loan amount, customer credit tier, and historical purchase patterns from similar customers.

CDK Global

DealerSocket

4

Assess customer risk profile

Determine if customer is high-value prospect for premium products or requires basic coverage options based on creditworthiness and vehicle value.

DealerTrack

CDK Global

5

 ACTION

Present targeted product bundle

Display interactive presentation with recommended warranty, GAP insurance, and protection products with personalized pricing and payment options.

CDK Global

AutoFi

6

 ACTION

Process product selections

Automatically update deal structure with selected F&I products, recalculate payments, and generate updated contracts for signature.

CDK Global

DealerTrack

Complete F&I documentation

Generate final contracts, product agreements, and compliance documentation while updating customer record with purchased products and future service touchpoints.

CDK Global

DealerSocket



Outputs

- Personalized F&I product presentation
- Updated deal jacket with selected products
- Completed F&I contracts and documentation



Key Metrics

- F&I product penetration rate
- Average F&I gross profit per deal
- Customer satisfaction scores

Tools & Integrations

- CDK Global
- DealerTrack
- AutoFi
- DealerSocket

AI Business OS

Actionable AI implementation strategies for business leaders ready to transform their operations.

COMPANY

[About](#)

RESOURCES

[Articles](#)

Industries

AI Business OS

CONNECT

MVP.dev

LinkedIn

© 2026 AI Business OS — A project by [MVP.dev](#)