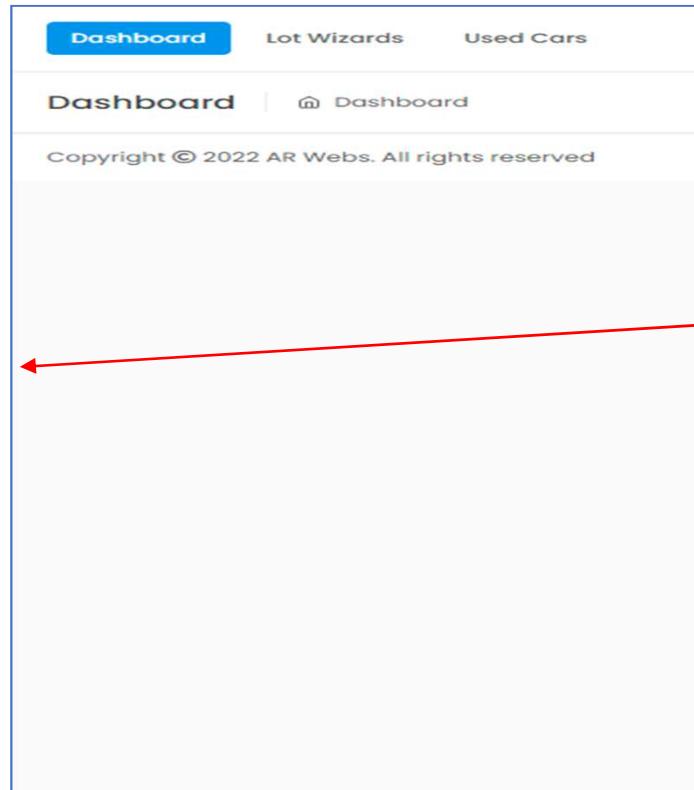


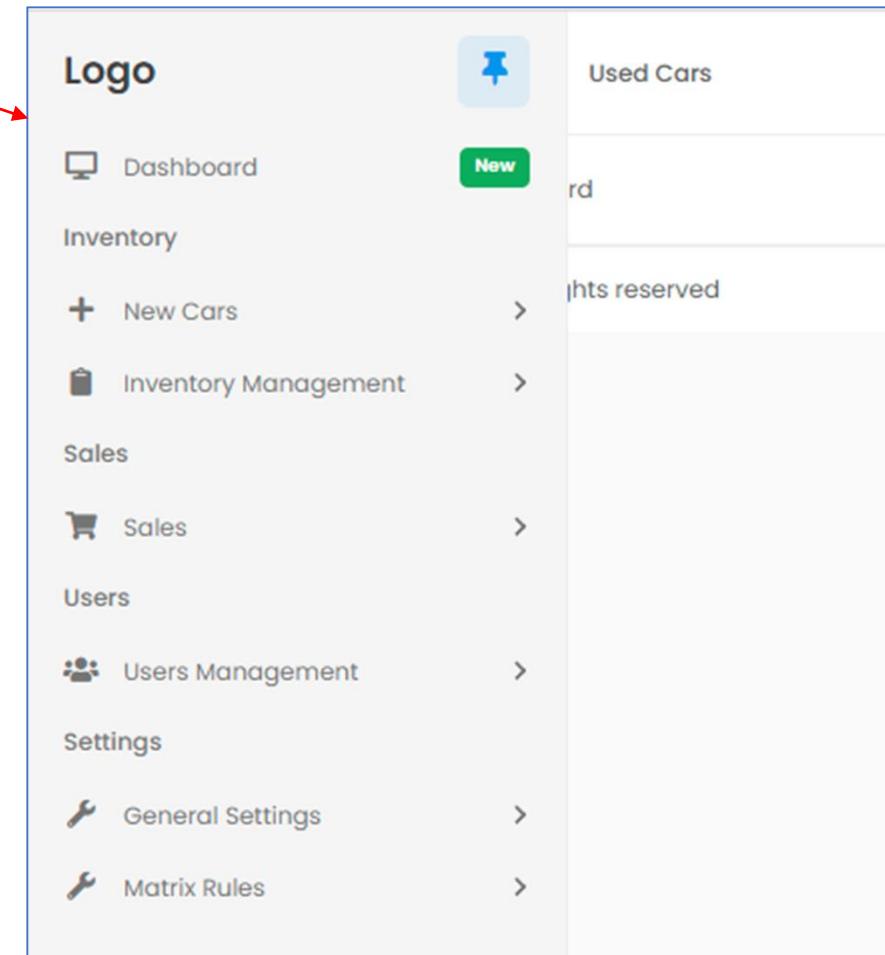
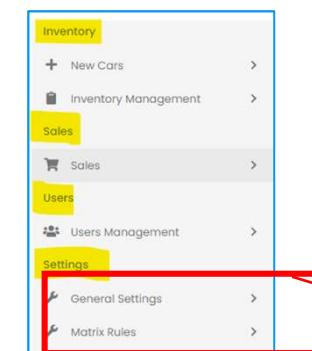
Required Days: 1



CURRENT EDITS NEEDED

SIDE BAR-remove categories....Inventory, Sales, Users, Settings.....I don't like to 3 dots look

Can you make the sidebar hidden....show on hoover mouse



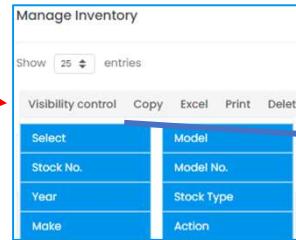
Have the General Settings and Matrix rules within 1 setting

- ALL PAGES –
after save changes....automatically close
window.
- please remove Do you really want to save
this? Message When saving changes.....
ONLY have a message when something is
being deleted

CURRENT EDITS NEEDED

USER IMAGE UPLOAD?  - ability to add it?

MANAGE INVENTORY - visibility control should have all columns from INVENTORY file



Manage Inventory

Show 25 entries

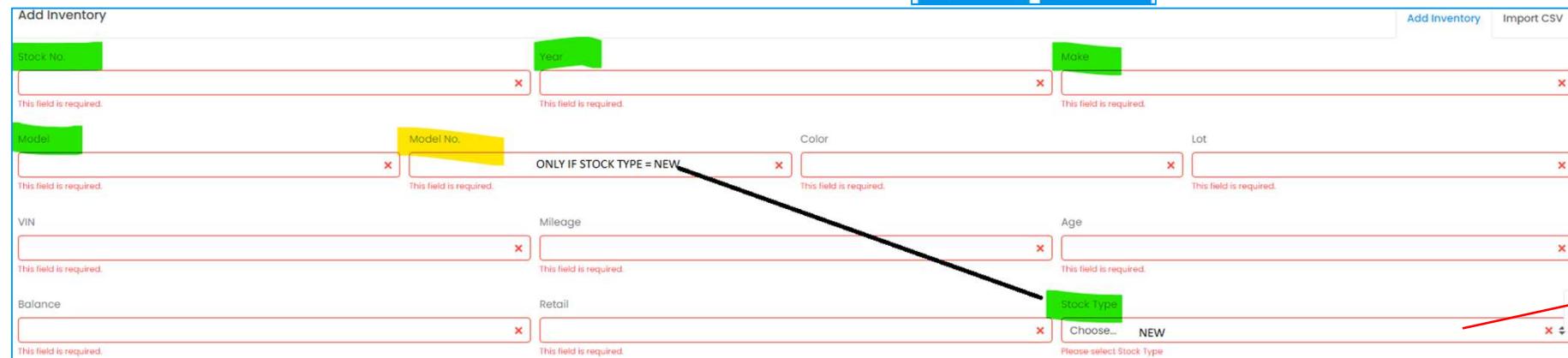
Visibility control Copy Excel Print Delete

Select	Model	Stock No.	Year	Make	Model	Model No.	Color	Lot	VIN	Mileage	Age	Balance	Retail	Certified Type	Stock Type	Wholesale
Stock No.	Model No.															
Year	Stock Type															
Make	Action															

Required Days: 2

ADD INVENTORY - required only, stock no, year, make, model, stock type.

Model No. only if stock type = New



Add Inventory

Stock No. Year Make Model Model No. Color Lot VIN Mileage Age Balance Retail Stock Type Wholesale

This field is required.

Model Model No. ONLY IF STOCK TYPE = NEW Color Lot

VIN Mileage Age

Balance Retail Stock Type Choose... NEW Please select Stock Type

Add stock type OTHER

ADD SALE

- add finance manager - not required (list from user role finance Manager)
- Add deal type – not required
- after creating sale automatically close create sale page and go to sold log – today
- Duplicate sale – there's no gross box on duplicate sale



Stock No. 072688XX

Not in Stock? Click to Add

Sales Consultant

Deal Notes...

Certified Yes No

USED 2019 FORD ESCAPE
Vin: 1FMCU9HD2KUC28862
Mileage: 39,572
Age: 127
Lot: MA CD428362
Balance: \$24,795.26

Gross \$ -\$110.95

Add other on certified

-on create add sale created by (capture person logged in)....maybe somewhere in this box or to the right of status
- add reconcile Date check box and date....this date will be used to move deal to another month....example if car sold 4/25/2022 but the deal doesn't get finalized until 5/25/2022..... We will add this date...doesn't count as a sale for 5/25/2022 but it does count for the month of May total....default value will be same date as sold date...this is blocked unless the checkbox is checked



Add Sale

Date: 05-01-2022 16:17

Reconcile 05-01-2022 16:17

ADD SALE

Required Days: 1

Customer account

First name	Middle name	Last name	State	More Information ▾
------------	-------------	-----------	-------	------------------------------------

Address 1*	Your address here	Address 2	Your address here
City*	Country*	Zip Code*	
Mobile*	Alternate Contact	Email*	

Address 1*	Your address here	Address 2	Your address here
City*	Country*	Zip Code*	
Mobile*	Alternate Contact	Email*	

[Add Co-Buyer ▾](#)

Add Co-Buyer
NOT REQUIRED

Note1: we will try to shrink the stuff as much as possible, but some areas are restricted by libraries to change the layout

Note2: Not confirm but we will try our best to set date range in datatable or try to find any alternative

Required Days: 2

The new buttons on top left and top right are not showing up in mobile

ADD

These buttons will have a count like we did with Lot Wizard

SOLD LOGS – SALES MANAGER VIEW

-empty space---move Sold Logs and Filter button on right to same line as filters buttons, remove top show entries (already at bottom), sold date too wide, you can shrink everything else to fit to give more room for notes.
-add age between Vehicle and Certified

Sold Logs		Today	Yesterday	Current Month	Show All	Pending 4	Delivered 2	Cancelled 1	Copy	Excel	Print	Filter	Search:	
Id	Date	First Name	Last Name	Sales Consultant	Stock #	Vehicle	Age	Certified	Lot	Gross	Status	Notes	Balance	Action
Ir-24-2022	Jhon F	Jhon L	Jhon L	John Doe	O72688XX	USED 2019 FORD ESCAPE	No	MA CD428362	1827.26	Delivered	Deal notes	\$24,795.26		

-move stock # before vehicle

-add stock type to VEHICLE (before year)

-group by Status descending (with count) like we did with Lot Wizard.... -default sort by status descending, Sales consultant ascending, then sold date ascending

-filter date range without having to click each date....maybe something like this?

Start date End date

Sold Date	First Name	Last Name	Sales Consultant	Stock #	Vehicle
Mar-24-2022	Jhon F	Jhon L	John Doe	O72688XX	2019 FORD ESCAPE
May-01-2022	wewee	wewew	John Doe	O72688XX	2019 FORD ESCAPE

-filter needs Stock type....you can remove first name

-salesperson view....should only see sales assigned to them only

-add copy/excel/print

-in sold logs list....format stock # and Vehicle red if sale is duplicate and status does not equal to Cancelled

-default sold log filter to exclude stock type OTHER

-move create sale button to right

-when mouse over sale...it's highlighting everything except sold date

Today	Yesterday	Current Month	Show All
Sold Date			
Mar-17-2022			

not highlighting

Show count

Please add Consultant Notes on details page.
This is not visible on main page...just details.

Add
Thank You Card checkbox
Only editable by Sales Manager
General Manager

Stock #: O72688XX
Sales Consultant: John Doe
Certified: YES

Deal Notes:
Deal notes

Consultant Notes:
Consultant notes

Thank you card:
Jhon F Jhon M Jhon L
Address 1 Address 2 City

Required Days: 1

SOLD LOGS – SALES CONSULTANT VIEW

Math spacing same as above view except will be hiding some fields...
-Sales Consultant should only see sales assigned to their name only
HIDE- Sales Consultant (it's already in their name), Age, Gross, Balance
The filter buttons count is from sales logged into their name only also

Sold Logs		Today		Yesterday		Current Month		Show All	Pending 4	Delivered 2	Cancelled 1	Filter	Search:
Sold Date	First Name	Last Name	Stock #	Vehicle	Certified	Lot	Status	Notes	Consultant Notes			Salesperson Status	Action
Mar-24-2022	Jhon F	Jhon L	072688XX	JSED 2019 FORD ESCAPE No	MA CD428362	Delivered	Deal notes					GMD Submit	  

I know we talked about making this just visible to sales consultant.
I need to add 2 columns that can be editable by sales consultant.
So everything from the left of this line can only be edited by Admin,
Sales Manager, General Manager

Everything on this side can be edited by the 3 on the other side and the sales
Consultant.

Salesperson Status.....this is the same status as the TO DO status.
So if it's edited here.....it will also edit on the To Dos page

Sale Details

Date: 03-24-2022 18:28	Status: Delivered		
Stock #: 072688XX	Sales Consultant: John Doe	Certified: YES	
Deal Notes: Deal notes	USED 2019 FORD ESCAPE Vin: 1FMCU9HD2KUC28862 Mileage: 39,572 Age: 127 Lot: MA CD428362 Balance: \$24,795.28 Gross: \$27,250		
Consultant Notes: Consultant notes			
Jhon F	Jhon M	Jhon L	Ri
Address 1: address 1	Address 2: Address 2	City: City	Country: Pakistan
Zip Code: 39000	Mobile: 03123456789	Contact #: Contact #	Email: contact@gmail.com

In Sales Consultant view also HIDE
Balance, Gross in details page

Required Days: 1

MATRIX-

- is it possible to just click line to view instead of action icon  remove action icon if possible
- Center word Net,HB, Invoice,MSRP, BDC Left align Cost?

Matrix Details		
2022 Accord LX 1.5T CVIFINEW		
NET	COST	\$25394.17
HB		\$522.40
INVOICE		\$25916.57
MSRP		\$27135
BDC		\$32135
Dealer		
\$50000		
Other		
\$20000		
Lease		\$10000

format Other and the money red

-box rates separate from lease rates

-

-BOLD- year, model. Trim

Year	Model	Trim
2022	Accord	LX 1.5T
2022	Accord	LX 1.5T w/Premium Color

-remove 2021 button and add 2024 and move it to the left side....also have a little space to separate the years and the Models

ALL	2022	2023	2024	ALL	Accord	Civic	CR-V	HRV	INSIGHT	ODYSSEY	Passport	Pilot	Ridgeline
-----	------	------	-------------	-----	--------	-------	------	-----	---------	---------	----------	-------	-----------

BDC	Action
\$32,135	

Format Green Bold...maybe dark so it's ok with white theme...also in manage matrix page

-put 24-36 months lease rate above one pay

FINANCE RATES 660+	FINANCE RATES 610-659	EASE RATES 660+	LEASE RATES 610-659
24-36 Months	24-36 Months	24-36 Months	24-36 Months
37-48 Months	37-60 Months	One Pay	One Pay
49-60 Months	61-72 Months		
61-72 Months			
Expires 04-08-2022		Expires 04-09-2022	

-change Expire In to Expires

Note: Please Mentioned the file name and assist me how we have to implement the file with the matrix?

Add 4 buttons inside details page.

It will load PDF that is loaded inside settings

...needs to be a file I can delete and upload monthly

I will send current PDF as examples

FINANCE RATES 660+	FINANCE RATES 610-659	LEASE RATES 660+	LEASE RATES 610-659
24-36 Months	24-36 Months	24-36 Months	24-36 Months
37-48 Months	37-60 Months	One Pay	One Pay
49-60 Months	61-72 Months		
61-72 Months			
Expires 04-08-2022		Expires 04-09-2022	

Standard Retail Rates

Programs

Incentives Summary

Standard Lease Rates

Unfortunately, sir, we can't able to read PDF files programmatically.
Please let us know what we have to do now?

Required Days: 1

SWAPS

Empty space- put on same line.... Swaps list, filter, add swap, search on same line

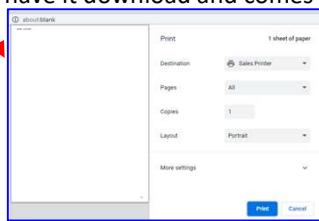
Dropdown should be when invoice sent only....not when transferred

Dropdown should be when invoice received only....not when transferred

Net cost out and in----change decimal point to 2....also increase font on both net cost (double..maybe triple)

Print has an issue – I have to hit print then print again

Maybe have it download and comes up on bottom left screen



Swap list-vehicle out details....not pulling stock #...it's pulling a 4 digit number

Buttons for----Pending, Paperwork done, Completed

Add transferred out & transferred in on swap list page

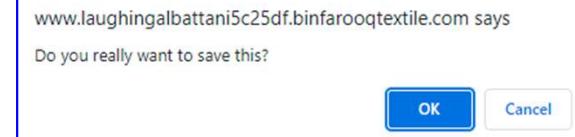
-notes doesn't have to be that wide

Submitted by should be capture name of person logged in

Remove required fields

From dealer only required if vehicle is entered on Vehicle out

Remove message when submitting or updating



Add Sales Consultant list.
Ability to do a manual entry

Add Tagged to Swap list
(checkbox)

If Hdag has cents it's causing
the net cost to have too many
decimals....should be only 2
decimals

also increase font on both net
cost (double..maybe triple)
This is more important on
print page

also add print on add swap
and edit swaps page

Required Days: 1

REG PROBLEM

-empty space---

Also shrink columns to make more Room for Problem and Sales consultant notes

Registration Problems								Copy	Excel	Print	Filter
Contract Date	Age	Problem Date	Customer Name	Sales Consultant	Finance Manager	Vehicle	Problem	Sales Consultant Notes			
Apr-01-2022	31	Apr-13-2022	Jhon F Jhon L	John Doe	Finance Manager 1	2022 HOND ACCORD	problem statement	Sales Consultant Notes			
Apr-23-2022	9	Apr-22-2022	Customer name edired	John Doe	Finance Manager 1	Honda Accord	Problem Statement	Sales Notes			

New Registration Problem

Contract Date: 05-02-2022 16:46 ✓ Problem Date: 05-02-2022 16:46 ✓

Customer Name: ROBERT SMITH Sales Consultant: sales consultant Finance Manager: Finance Manager

Stock No. 12151 Vehicle 21 ACCORD

Problem OWES TAXES Sales Consultant Notes... Sales Consultant Notes...

Submit Cancel

Not required

-salesperson....view only ones assigned to them....all other roles can see all if given access to view/edit

Registration Problems								Copy	Excel	Print	Filter
Contract Date	Age	Problem Date	Customer Name	Sales Consultant	Finance Manager	Vehicle	Problem	Sales Consultant Notes			Action
Apr-01-2022	31	Apr-13-2022	Jhon F Jhon L	John Doe X	Finance Manager 1	2022 HOND ACCORD	problem statement	Sales Consultant Notes	X		
Apr-23-2022	9	Apr-22-2022	Customer name edired	John Doe X	Finance Manager 1	Honda Accord	Problem Statement	Sales Notes	X		
May-02-2022	Today	May-02-2022	ROBERT SMITH	sales consultant	Finance Manager 1	21 ACCORD	OWES TAXES	Sales Consultant Notes	X		

Sales Consultant can ONLY edit sales consultant notes

Instead of delete action, please have a 2 additional actionsFixed, Not Fixed (checkbox) in actions (these actions are not editable by Sales Consultant....only Sales manager & Office..this way we can track what the problem was.....so we need button for opened problems (not Fixed) and fixed problem (fixed)

Required Days: 2

ADD USER

I am thinking of the future with Location...
Say I do this for 3 locations....
ADMIN would have access to all locations

- Add Mobile & Extension REQUIRED**
- Add Schedule Not required Editable**
- If of maybe Block out the 2nd time? thoughts?

Also add them in
Edit user

Add User

User Name	abc@gmail.com
Location	
Extension	
Email	Please insert your email
Role	Select
Mobile	Please insert your Mobile Number
Password
Confirm Password	Please reenter your password

Schedule

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
9:00	8:00	OFF		9:00	5:00	9:00
				5:00	9:00	5:00
					9:00	6:00
					OFF	

Save **Reset**

Edit User

User Name	Finance Manager 1
Email	finance@gmail.com
Role	Mobile
Mobile	Please insert your Mobile Number
Role	Finance Manager
Password	
Confirm Password	

Save Changes **Reset**

Required Days: 1

PERMISSIONS

If there is no access
In permission.

The button to click should
Not show.

Example...sales consultant has access to Sold logs, Todo, registration
problems.....I don't want them to see the other options

The screenshot shows a web application interface with a sidebar menu and a main dashboard area. The sidebar includes sections for Inventory (New Cars, Inventory Management), Sales (Sales, Sold Logs, To Do's, Registration Problem), Users (Users Management, General Settings, Matrix Rules), and Settings. The main dashboard displays a 'Dashboard' section with a 'New' button, a copyright notice (Copyright © 2022 AR Webs. All rights reserved), and a message 'Hand-crafted and made with ❤️'. A red arrow points from the sidebar menu towards the permissions table below, indicating that certain menu items are being removed or restricted. The permissions table lists various system modules with checkboxes for Add, Edit, Remove, and View permissions. Several checkboxes are highlighted with red boxes and arrows pointing to them from the sidebar, specifically for the Sale, Registration Problems, and Lot Wizards modules, suggesting that these are the only accessible options for a sales consultant.

Permissions			
Administer	<input checked="" type="checkbox"/> Check All	<input checked="" type="checkbox"/> View	<input checked="" type="checkbox"/> Edit
MATRIX	<input checked="" type="checkbox"/> View	<input checked="" type="checkbox"/> Edit	<input checked="" type="checkbox"/> Remove
SWAP	<input checked="" type="checkbox"/> Add	<input checked="" type="checkbox"/> Edit	<input checked="" type="checkbox"/> Remove
INCENTIVES	<input checked="" type="checkbox"/> Edit		
INVENTORY	<input checked="" type="checkbox"/> Add	<input checked="" type="checkbox"/> Edit	<input checked="" type="checkbox"/> Remove
SALE	<input checked="" type="checkbox"/> Add	<input checked="" type="checkbox"/> Edit	<input checked="" type="checkbox"/> Remove
TO DO'S	<input checked="" type="checkbox"/> Edit		
REGISTRATION PROBLEMS	<input checked="" type="checkbox"/> Add	<input checked="" type="checkbox"/> Edit	<input checked="" type="checkbox"/> Remove
USERS	<input checked="" type="checkbox"/> Add	<input checked="" type="checkbox"/> Edit	<input checked="" type="checkbox"/> Remove
ROLES	<input checked="" type="checkbox"/> Add	<input checked="" type="checkbox"/> Edit	<input checked="" type="checkbox"/> Remove
INCENTIVE RULES	<input checked="" type="checkbox"/> Add	<input checked="" type="checkbox"/> Edit	<input checked="" type="checkbox"/> Remove
SALES PERSON'S TODO RULES	<input checked="" type="checkbox"/> Add	<input checked="" type="checkbox"/> Edit	<input checked="" type="checkbox"/> Remove
SWAP LOCATION	<input checked="" type="checkbox"/> Add	<input checked="" type="checkbox"/> Edit	<input checked="" type="checkbox"/> Remove
NEW CAR PRICE BY MANUFACTURE	<input checked="" type="checkbox"/> Add	<input checked="" type="checkbox"/> Edit	<input checked="" type="checkbox"/> Remove
MATRIX RULES	<input checked="" type="checkbox"/> Add	<input checked="" type="checkbox"/> Edit	<input checked="" type="checkbox"/> Remove
BDC RULES	<input checked="" type="checkbox"/> Add	<input checked="" type="checkbox"/> Edit	<input checked="" type="checkbox"/> Remove
RATE RULE	<input checked="" type="checkbox"/> Add	<input checked="" type="checkbox"/> Edit	<input checked="" type="checkbox"/> Remove
LEASE RULE	<input checked="" type="checkbox"/> Add	<input checked="" type="checkbox"/> Edit	<input checked="" type="checkbox"/> Remove
DEALER CASH INCENTIVE RULES	<input checked="" type="checkbox"/> Add	<input checked="" type="checkbox"/> Edit	<input checked="" type="checkbox"/> Remove
Lot Wizards	<input checked="" type="checkbox"/> Add	<input checked="" type="checkbox"/> View	<input checked="" type="checkbox"/> Edit
Used Cars	<input checked="" type="checkbox"/> Add	<input checked="" type="checkbox"/> View	<input checked="" type="checkbox"/> Edit

Required Days: 2

INCENTIVES

- change Misc1 to Lease Loyalty, then change 2 and 3 to 1 and 2
- empty space--- incentive list and right filter button on same line as filter buttons, remove top left show entries

The screenshot shows the 'Incentives list' page. At the top, there are three tabs: 'Incentives list' (selected), 'Pending Incentives', and 'Submitted Incentives'. Below the tabs is a toolbar with 'Copy', 'Excel', and 'Print' buttons, all highlighted with a red box. A search bar and a 'Filter' button are also present. The main table has columns for Sold Date, Customer, Stock #, Vehicle, College, Military, Loyalty, Conquest, Lease loyalty, Misc 1, Misc 2, and Misc 3.

The screenshot shows the 'Sales Incentives' edit screen. It includes dropdowns for College (No), Military (No), Loyalty (No), and Conquest (Yes). Each dropdown has a 'Select date' button next to it. To the right, there are three more dropdowns labeled 'Misc 1', 'Misc 2', and 'Misc 3', each set to 'Yes' and also with a 'Select date' button. Below these is a 'Max-Upload 10' section with a 'Choose Files' button and a message 'No file chosen'. At the bottom are 'Save Changes' and 'Cancel' buttons.

Format on edit screen RED if yes or Yes approved if no date is selected

move Choose files to bottom so on mobile it's above save changes

The screenshot shows the 'Incentives list' page with a single row of data. The columns are: Sold Date (Mar-15-2022), Customer (Jhon F Jhon L), Stock # (055454A_4), Vehicle (USED 2019 HOND CR-V), College (Yes/Approved by Jhon Doe), Military (Yes/Approved by Jhon Doe), Loyalty (Yes/Approved by Jhon Doe), Conquest (Yes/Approved by Jhon Doe), Misc 1 (Yes), Misc 2 (No), Misc 3 (Yes), and Action (Edit icon).

Remove filtered from total entries....it's pulling total from sold logs and I don't need that

Showing 1 to 2 of 2 entries (filtered from 8 total entries)

- close edit incentive screen after save changes and successfully updated
- group by status (Delivered, Pending) ascending with count....exclude cancelled (deal status cancelled will not be in incentives at all)

Required Days: 2

INCENTIVES

Note: Need Explanation a Little bit

Ability to reorder incentives....or maybe you can do something else to fix.

If I put all on an incentive....it does not come up to add sale because the incentive above were set to inactive.

So re-order to top will fix that???

Model	Year	Model no.	Model Type	Ex Model No	Expire In.	College	Military	Loyalty	Conquest	Misc 1	Misc 2	Misc 3	Action
ACCORD	2022	All	NEW		Expire	N/A	N/A	YES	YES	N/A	N/A	N/A	 
ACCORD	All	All	ALL	ACCO	Expire	YES	YES	YES	YES	YES	YES	YES	 
ACCORD	All	All	USED	ACCO	Expire	YES	YES	YES	YES	YES	YES	YES	 
ACCORD HYBRID	All	All	ALL	ACCO	Expire	YES	YES	YES	YES	YES	YES	YES	 
ACCORD HYBRID	21	12	ALL	ikwq	Expire	YES	YES	YES	YES	YES	YES	YES	 
ACCORD HYBRID	22	ow	ALL	ue wnqw	Expire	YES	YES	YES	YES	YES	YES	YES	 
All	2022	All	ALL		334 Days	YES	YES	N/A	N/A	N/A	N/A	N/A	 

Add \$ value to each incentive.
This will show when adding a sale
If incentive is active

I Just noticed...please put box closer to
The incentive it belongs to.

Example College box...military is touching
Box and looks confusing...same with the rest

Edit Incentive Rule

Select Date: 04-22-2022 - 04-29-2022

Model	Year	Model No.	Model Type	Exclude Model No
ACCORD	2022	All	NEW	Exclude Model No.
<input type="checkbox"/> Select All <input type="checkbox"/> College <input type="checkbox"/> Military <input checked="" type="checkbox"/> Loyalty <input checked="" type="checkbox"/> Conquest <input type="checkbox"/> Misc 1 <input type="checkbox"/> Misc 2 <input type="checkbox"/> Misc 3				
\$ \$ \$ \$ \$ \$ \$				

Incentives

College	No	Military	No	Loyalty	No	Conquest	No	Misc 1	No	Misc 2	No	Misc 3
---------	----	----------	----	---------	----	----------	----	--------	----	--------	----	--------

Load Incentives **Update Changes** **Cancel**

Required Days: 1

TO DOS

Registration Done format Blue

Sales Consultant Todo	Vin Check	Doesn't Need	Insurance	In House	Trade Title	Payoff	Registration	Done
Inspection	Doesn't Need	Salesperson Status	Contracted	Paid	No			

Salesperson status Contracted...format Blue

Default to 50

ADD

Opened TO DO action has a scroll that doesn't line up with the lines.....If I hit completed button and then back to Opened it goes away

Sale Consultant To Do list											
Show 25 entries											
Filter											
Sold Date	Customer	Stock #	Vehicle	State	Vin Check	Insurance	Trade Title	Registration	Inspection	Salesperson Status	Paid
Mar-16-2022	abc Edited asb Edited	54876_1832	NEW 2021 HOND PILOT	RI	Not Need	N/A	No Trade	N/A	Done	GMD Submit	Yes
Mar-17-2022	BRANDON SCOTT	O73005XXA_1760	USED 2017 HOND ACCORD	RI	On Hold	Need	Need	Pending	Need	Deal Written	No
Mar-21-2022	MITCHELL WHITE	O72848XX	USED 2019 GENES G70	MA	Need	Need	Need	Pending	Need	Deal Written	No
Mar-21-2022	FRED PEREIRA	O55637A_1901	USED 1000 Make Edited Model Edited	RI	Check Title	Need	Need	Pending	Need	Deal Written	No

Add sales consultant and this should be grouped by sales consultant with count

When mouse over line....Action not highlighting

on Status	Paid	Action
nit	Yes	<input type="checkbox"/>
an	No	<input type="checkbox"/>
en	No	<input type="checkbox"/>
an	No	<input type="checkbox"/>

ADD

Delivered to do should stay in Opened status if anything else is in the RED...except paid

Sale Consultant To Do list											
Show 25 entries											
Filter											
Sold Date	Customer	Stock #	Vehicle	State	Vin Check	Insurance	Trade Title	Registration	Inspection	Salesperson Status	Paid
Mar-15-2022	Jhon F Jhon L	O55454A_4	USED 2019 HOND CR-V	CT	Not Need	In House	Payoff	Done	Not Need	Delivered	Yes
Mar-21-2022	MITCHELL WHITE	O72848XX	USED 2019 GENES G70	MA	Need	Need	Need	Pending	Need	Delivered	No
May-02-2022	MICHAEL JOE	O72710XX	USED 2019 TOYO RAV4	RI	Done	In House	No Trade	Customer Has	Done	Delivered	No

SWAP LOCATIONS

add

Dashboard | Dashboard

Copy Excel Print

Add button to this screen

Locations

Show 25 entries

Search:

Dealership	Dealer #	Phone	Main Contact	Cell	Call or Text	Round Trip	Action
BEDARD BROTHERS	206817	413-743-0014				5:40	
BRANDFON	206874	203-481-1616	BOB	860-508-8766	Text	3:38	
CARDINAL	207844	860-449-0411				2:08	
COURTNEY	207618	203-877-2888				4:08	

Required Days: 1

BODYSHOP CONTACTS

Getting error message

www.laughingalbattani5c25df.binfarooqtextile.com says

DataTables warning: table id=datatable-1 - Invalid JSON response. For more information about this error, please see <http://datatables.net/tn/1>

OK

Not showing contact that are already entered....is it the error causing this?

Stuck on loading

Gentiles, Kings, Leers, Mike's / Dent Fixx, Perez, Scott's

Bodyshop Contacts										+ Add New
										Search: <input type="text"/>
Business Name	Shop	Address	City	State	Zip	Contact	Phone	Action		
Loading...										
Showing 0 to 0 of 0 entries										

add inactive checkbox..... If inactive will not show as an option
in Lot Wizard

Note: Need an Explanation a little bit during project

Required Days: 2

RATE RULE & LEASE RULE

Dashboard | Lot Wizards | Used Cars

Rate Rule List

Stock Details:

Model: Accord

Finance: Finance 24-36 1.9%

Model Year Model no.

Accord 2022 All

Edit BDC Rule

Edit rate rule page says edit BDC rule

Dashboard | Lot Wizards | Used Cars

Lease Rule List

Stock Details:

Model: Accord

12,000 Miles Per Year
24-33 %
1

Rule Details: 15,000 - %
24 27 30

Edit BDC Rule

Edit Lease rule page says edit BDC rule

LEASE RULE

We never really finish this page.....some request weren't completed

R Me Apr 4, 7:32 PM
the lease rule is looking a little hard and many mistakes can happen every month when it updates.
maybe should be an import file that has the 15,000 per year.
it will lookup the model code (which is the same as Model No) from that file and input the correct line. i can make the name the same so it's not confusing.

the lookup model code (no) will be contains....because some of the lines have multiple codes.
let me know your thoughts

ATTACHMENTS

R Me Apr 4, 7:34 PM
example of lines with 2 model codes (no.)

ATTACHMENTS

If we get the details from the CSV file then there is no Model define their and also we have to split model no from "/" sir,
In this case, if any Model no contain any "/" in its number so maybe the software consider it as two Model no.

Please let me know are you okay with this?

Instead add expire date.
IF EXPIRED...DO NOT SHOW RESIDUAL
ON MATRIX DETAILS like we did with
Lease and finance rates

Edit BDC Rule

Stock Details:

Model: Accord

12,000 Miles Per Year
24-33 %
1

Year: 2022

Model No.: CIVIFINNEW

Rule Details: 15,000 - %
24 27 30

Remove

All we need here is the rule that will pull from The CSV file. Which is already working

Exclude Model No.

Expire In

Update Changes Cancel

If we do an import file
Then we remove this

I am sending a residuals
file

Required Days: 1

DEALER CASH INCENTIVE RULE

ADD expire

Dealer Cash Incentive Rule List									
Model	Year	Model no.	Exclude Model No	Expire In.	Dealer	Other	Lease	Action	
Accord	2022	All	CVIF3NEW	Expire	50000	20000	10000	 	

IF EXPIRED... DO NOT SHOW on matrix details

<u>Dealer</u> \$50000	<u>Other</u> \$20000	<u>Lease</u> \$10000
<u>FINANCE RATES 660+</u>	<u>FINANCE RATES 610-659</u>	<u>LEASE RATES 660+</u>
24-36 Months	24-36 Months	One Pay
37-48 Months	37-60 Months	24-36 Months
49-60 Months	61-72 Months	One Pay 24-36 Months

LOT WIZARD

Required Days: 2

LOT WIZARD

-group by Retail & Wholesale (it's Retail if Wholesale status=no)

Move search above the buttons.... But I want this search to search all the buttons and highlight if stock # is in that button....example....if vehicle search is in Lot note, Cars to Dealers, At Bodyshop..highlight them all

Search:

Not Touched 220	Hold For Recon 1	Send To Recon 2	Lot Notes 2	Cars to Dealers 222	Windshield 2	Wheels 2
To Go 1	At Bodyshop 2	Back From Bodyshop 3	Retail Ready 1	Gone 3		

Filter out if lot = LBO

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ADD THESE

So I found a major problem here....because we decided to delete inventory and upload a new one.....everything in lot wizard and used cars gets deleted.

The Not touched Inspection form once form submitted....it's on it's own list so when this stock # 072934XX get's deleted from the inventory....the history from the inspection doesn't disappear. (this will be the same with Used Cars) Year, Make, Model, Vin.....will NEVER change.....I want the rest to always update from the new CSV file...like we did with sold logs....always update (Model no., Color, Lot, Mileage, Age, Balance, Retail, Certified, Wholesale)

Inspections

Stock no. Vin: 072934XX || 5J8TC2H55KL023745 Submitted By: Admin

Lot Notes: Remove Lot Notes word inside box

Recon selection can be empty....If I accidentally button a button I can't unclick unless I click something else

Repairs: Select Repairs

Bodyshop: Select Repairs (Change to Select Bodyshop)

Bodyshop Notes:

Estimate: \$ Repair Paid: \$

Repair Sent: Resend:

Windshield: Nothing selected

Wheels: Nothing selected

Bodyshop is not required (but can be selected) if repairs are selected....this vehicle would be on the TO GO button.

Repairs: Front Bumper Lower

Bodyshop: Select Repairs (This field is required.)

Bodyshop Notes:

Estimate: \$ Repair Paid: \$

Repair Sent: Select date: Repair Return: Select date:

This is working ok....repair is selected, repair sent is selected.... Bodyshop is required

Please block repair sent and repair returned if repairs & bodyshop is blank

Repairs: Select Repairs

Bodyshop: Select Repairs

Bodyshop Notes:

Estimate: \$ Repair Paid: \$

Repair Sent: 05-05-2022 Repair Return: Select date

Repairs: Front Bumper Top

Bodyshop: Select Repairs (This field is required.)

Bodyshop Notes:

Estimate: \$ Repair Paid: \$

Repair Sent: 05-05-2022 Repair Return: Select date

LOT WIZARD - inspections

Please remove notification.....do you really wan to save this.
Also after save changes, automatically close window and go back to previous screen

The screenshot shows the 'Inspections' section of the LOT WIZARD interface. A confirmation dialog box is overlaid on the page, asking 'Do you really want to save this?'. The 'OK' button is highlighted with a red arrow. The page contains fields for Stock no. Vin (072954XX115J8TC2H55KLU23745), Lot Notes, submitted By (Admin), Recon (with 'Hold Recon for service' button highlighted with a blue border), Vehicle details (USED 2019 ACUR RDX, Mileage: 29,997, Age: 96, Lot: MA BU931378, Balance: \$36,258.51), Repairs, Bodyshop, Bodyshop Notes, Estimate, Repair Sent, Windshield, and Wheels. At the bottom are 'Save Changes' and 'Cancel' buttons.

These buttons are working ok

A screenshot showing three buttons with green outlines: 'Hold For Recon' (value 1), 'Send To Recon' (value 0), and 'Lot Notes' (value 0).

Required Days: 1

LOT WIZARD – lot notes [VIEW PAGE](#)

This is working ok.....just need to Change column view

Not Touched 289	Hold For Recon 1	Send To Recon 1	Lot Notes 1	Cars to Dealers 290	Windshield 0	Wheels 0
To Go 0	At Bodyshop 0	Back From Bodyshop 1	Retail Ready 0	Gone 1		
Search: <input type="text"/>						

Remove these columns

Lot	Balance	Retail	Certified	Stock Type	Wholesale
MA BU779144	\$33,519.00	\$32,968	No	USED	No

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[ADD THESE](#)

Move model after Make

Make lot notes wider to fit more notes

Action	Note Added By	Lot Notes	Age	Stock no Vin	Year	Make	Model	Color	Mileage
	Admin	test note	93	O72938XX JF2SKAWC5KH442207	2019	SUBA	FORESTER	SILVER	9,904

This is grouped by bodyshop....please leave this one ungrouped

Add delete inspection to all filters.....DON'T ADD IT to the Not Touched page.
Delete inspection would delete anything that was select....this would make the Vehicle Not Touched (not inspected)

Required Days: 2

LOT WIZARD- cars to dealers

Cars to Dealers
1

change the color to red if it's more than 0.....but if it's zero than should be green
The number it should count is how many is in pending

Pending are only cars that work needed is not blank..

Action	Age	Stock no Vin
	96	O72934XX 5J8TC2H55KL023745

Will need an inventory button....these are vehicles from CSV file.

Inventory stock # can be duplicated (as long as it's not in pending)

If O72934XX is in pending status so I don't want O72934XX to come up on inventory....BUT

If O72934XX was already sent and returned.....if would go to Complete,
O72934XX should be able to be selected again from inventory if it's need to be sent
back out for something else...

Action	Age	Stock no Vin	Year Make Model	Worked Needed	Notes	Date Sent	Date Returned
	96	O72934XX 5J8TC2H55KL023745	2019 ACUR RDX			05-05-2022	05-05-2022

Cars to Dealers
0

Block dates if work needed is blank.

Also block returned if date sent is blank

Work Needed

Work Needed

Notes

Type Something...

Date Sent

05-05-2022

Date Returned

05-05-2022

This will be the same for
Green = 0
Red <> 0

Not Touched
0

To Go
0

Lot notes
0

Windshield
0

Wheels
0

Not Touched
1

To Go
1

Cars to Dealers
1

Windshield
1

Wheels
1

Leave the other tabs colors the way they are

Hold For Recon
1

Send To Recon
0

At Bodyshop
0

Back From Bodyshop
1

Retail Ready
0

Gone
1

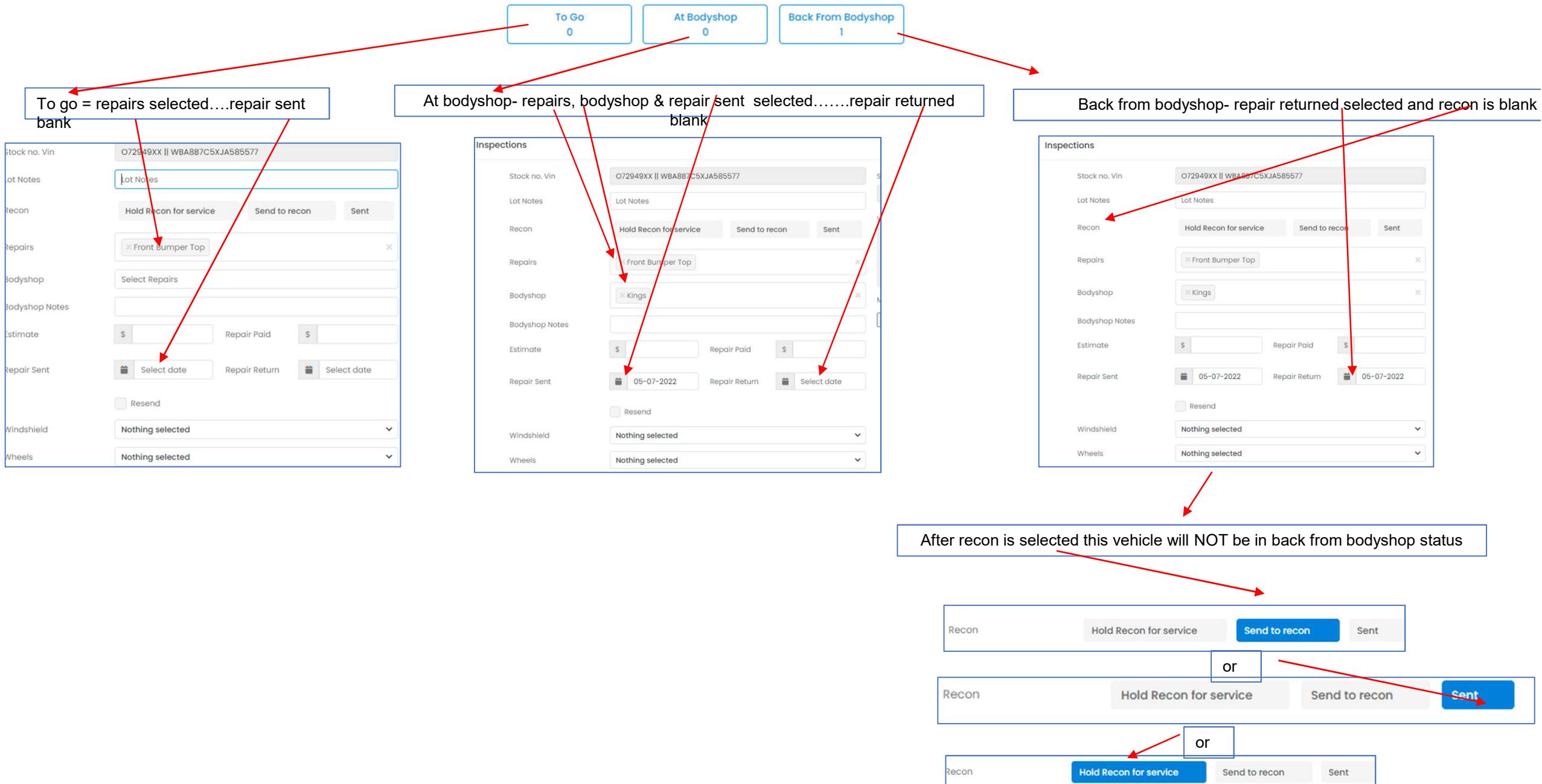
Cash To Dealers

Stock no. Vin	O72934XX 5J8TC2H55KL023745
Work Needed	Work Needed
Notes	Type Something...
Date Sent	05-05-2022 Date Returned

Date Sent Select date Date Returned

Block date sent and date returned if work needed is blank....date returned is also blocked in date sent is blank

LOT WIZARD-TO GO – AT BODYSHOP – BACK FROM BODYSHOP



LOT WIZARD-TO GO VIEW**PAGE**EDIT SCREEN
REMAINS
THE SAME**To Go****0**

Remove these columns----EDIT SCREEN REMAINS THE SAME

Year	Make	Color	Mileage	Lot	Balance	Retail	Certified	Stock Type	Wholesale	
------	------	-------	---------	-----	---------	--------	-----------	------------	-----------	--

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Stock no only..... No

Vin

ADD THESE

Action	Age	Model	Stock no	Repairs	Notes
No matching records found					
Showing 0 to 0 of 0 entries (filtered from 291 total entries)					

Age keeps updating
from CSV file

Required Days: 2

LOT WIZARD-at bodyshop &
back from bodyshop VIEW

At Bodyshop
0

Back From Bodyshop
2

EDIT SCREEN
REMAINS
THE SAME

Remove these columns-----EDIT SCREEN REMAINS THE SAME

Year	Make	Color	Mileage	Lot	Balance	Retail	Certified	Stock Type	Wholesale
------	------	-------	---------	-----	---------	--------	-----------	------------	-----------

Calculate days..... If repair returned date is blank
Today – repair sent date

But if repaired returned is not blank then
Repair returned date – repair sent date

Stock no only..... No
Vin

Copy Excel Print

ADD THESE

Action	Model	Days Out	Age	Stock no	Repairs	Notes
Scott's (1)						
	HR-V		72	055604A		
Mike's / Dent Fix (1)						
	Q8		93	07295IXX		
Kings (1)						
	340XI		93	072949XX		

Showing 1 to 3 of 3 entries (filtered from 291 total entries)

Show 25 entries

Previous 1 Next

Age keeps updating
from CSV file

Grouping is perfect

LOT WIZARD-Retail Ready

Retail Ready

0

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Remove recon

Move Model after make

ADD THESE

Action	Recon	Age	Stock no Vin	Model	Year	Make	Color	Mileage	Lot	Balance	Retail	Certified	Stock Type	Wh
No matching records found														

No matching records found

You can math the same columns as the Gone view

Shrink columns to fit

Gone

1

Action	Age	Stock no Vin	Model	Year	Make	Color	Mileage	Lot	Balance	Retail	Certified	Stock Type	Wholesale
blank (1)													
	62	O73060 1HGCVIF13JA256702	ACCORD	2018	HOND	SI	30,019	LBO			No	USED	Yes

Showing 1 to 1 of 1 entries (filtered from 291 total entries)

Show 25 entries

Previous 1 Next

Move Model after make

Required Days: 2

LOT WIZARD- WINDSHIELD

Windshield
0

-ungroup bodyshops

Windshield selected

Windshield	Replace
Wheels	Select All Deselect All
Repair	
Replace	
Sent	
Done	

Remove done from here

Windshield Done
Wheels Done

Add 2 buttons filters....

Pending Complete

Pending if windshield is selected and not done

Done if windshield is selected done is check marked

Model Year Make Color MOVE model after make

Add Windshield

once balance is 0....move to gone

Action	Age	Stock no Vin	Windshield	Year	Make	Model	Color
--------	-----	-----------------	------------	------	------	-------	-------

LOT WIZARD- =WHEELS

Wheels
0

-ungroup bodyshops

Model Year Make Color

Action Age Stock no || Vin Wheels Year Make Model Color

Windshield Replace Done
Wheels Passenger Front Done

Add Wheels

Passenger Front
Select All Deselect All
Driver Front
Passenger Front
Driver Rear
Passenger Rear
Done Remove done from here

Add done checkboxes

Pending Complete

Pending if WHEELS is selected and not done

Done if WHEELS is selected done is check marked

THE SAME STOCK NO CAN BE IN WINDSHIELD AND WHEELS

once balance is 0....move to gone

USED CARS

USED CARS - form

Keys Keys

Remove keys words before box....just leave Checkbox and Keys after

Put these on same line
Keys, date sent, date sold, sold price

Put these on same line
UCI, UCI RO#, UCI APPROVED, UCI CLOSED,
UCI OK

Used Cars

Stock no. Vin: 072938XX || JF2SKAWC5KH442207 Submitted By: Admin

Inventory Date: 05-06-2022

Retail Status: Retail Wholesale Sold Intercompany

Purchase From: Auction Customer Honda Intercompany

Certified Title

Title Priority:

Sales Consultant: Nothing selected

Customer:

Keys Date Sent: Date Sold: Sold Price:

Age based from csv file if you are doing add to sheet page
If vehicle has been added to sheet....then base from inventory date

Title Notes:

Online Description: RO Online Notes: Add Service:

UCI: Nothing selected UCI RO #: UCI Approved: UCI Closed: OCI OK

Save Changes Cancel

Vehicle: USED 2019 SUBA FORESTER
Mileage: 9,904
Age: 93
Lot: MA BU779144
Balance: \$33,519.00

Required Days: 2

USED CARS - ADD TO SHEET

W/S Ready To Ship 0	W/S Keys Pulled 0	At Auction 0	Sold At Auction 0
------------------------	----------------------	-----------------	----------------------

Add To Sheet 0	Missing Date 290	Title Issues 0
-------------------	---------------------	-------------------



Filter out if lot = LBO

Age on add to sheet will be from the CSV file.....all the other pages on Used cars will be calculation from Inventory Date...see next page

Change colori didn't realize light mode would look too light....choose something that looks good in black or white them

Change colormake red if value does not equal to zero

So I found a major problem here....because we decided to delete inventory and upload a new one.....everything in lot wizard and used cars gets deleted.

The add to sheet submitted....it's on its own list so when this stock # 072934XX get's deleted from the inventory.....the history from the inspection doesn't disappear. (this will be the same with Used Cars)

Year, Make, Model, Vin.....will NEVER change.....I want the rest to always update from the new CSV file...like we did with sold logs....always update (Model no., Color, Lot, Mileage, Age, Balance, Retail, Certified, Wholesale)

Copy Excel Print

ADD THESE

Action	Age	Stock no Vin	Model	Year	Make	Color	Mileage	Lot	Balance	Retail	Certified	Stock Type	Wholesale
	96	072934XX 5J8TC2H55KL023745	RDX	2019	ACUR	GRAY	29,997	MA BU931378	\$36,258.51	\$35,998	No	USED	No

Move model after make

Add all action..... to add everything on add to sheet page.

set automatically set Retail Status to Retail
If wholesale (CSV file) is blank. UCI default to need
to need If wholesale = no

But if wholesale = yes then automatically
mark it Wholesale

Title and certified also default to no

Retail Status **Retail**

Wholesale **Yes**

UCI
Nothing selected
Select
Need
Opened
Closed

Certified Title

Retail Status **Retail** **Wholesale** **Sold** **Intercompany**

Required Days: 6

USED CARS - ADD TO SHEET

Add All

Action	Age	Stock no Vin	Model	Year	Make	Color	Mileage	Lot	Balance	Retail	Certified	Stock Type	Wholesale
	96	O72934XX 5J8TC2H55KL023745	RDX	2019	ACUR	GRAY	29,997	MA BU931378	\$36,258.51	\$35,998	No	USED	No

If wholesale = no (from CSV file)

Wholesale
No

Default values when adding to sheet or add all

If wholesale = Yes (from CSV file)

Wholesale
Yes

Used Cars

Stock no, Vin	O72934XX 5J8TC2H55KL023745	Submitted By	Admin
Inventory Date	<input type="button" value="Inventory date"/>	Vehicle	USED 2019 ACUR RDX Mileage: 29,997 Age: 96 Lot: MA BU931378 Balance: \$36,258.51
Retail Status	<input checked="" type="button" value="Retail"/> <input type="button" value="Wholesale"/> <input type="button" value="Sold"/> <input type="button" value="Intercompany"/>	No selection <input type="checkbox"/> Certified	
Purchase From	<input type="button" value="Auction"/> <input type="button" value="Customer"/> <input type="button" value="Honda"/> <input type="button" value="Intercompany"/>	Title No selection	
Title Priority	<input checked="" type="button" value="New"/> <input type="button" value="Used"/> <input type="button" value="Unknown"/>	Title Notes <input type="button" value="Title Notes..."/>	
Sales Consultant	<input type="button" value="Not assigned"/> <input type="button" value="Sales Consultant"/>	Customer No selection	
Date Sent	<input type="button" value="No selection"/> <input type="button" value="Date Sold"/>	<input type="button" value="No selection"/> <input type="button" value="Date Sold"/>	Date Sold <input type="button" value="No selection"/>
Sold Price	<input type="button" value="\$ No selection"/> <input type="checkbox"/> Keys	<input type="checkbox"/> UCI <input type="button" value="No selection"/>	
Online Description	<input type="button" value="No selection"/>	RO Online Notes	<input type="button" value="No selection"/> Add Service
UCI	<input checked="" type="button" value="Need"/> <input type="button" value="Available"/> <input type="button" value="Not selected"/>	UCI RO #	<input type="button" value="No selection"/> <input type="button" value="No selection"/> <input type="button" value="No selection"/> <input type="button" value="No selection"/>
UCI Approved <input type="checkbox"/> UCI Closed			
<input type="checkbox"/> OCI OK No selection			

Used Cars

Stock no, Vin	O72934XX 5J8TC2H55KL023745	Submitted By	Admin
Inventory Date	<input type="button" value="Inventory date"/>	Vehicle	USED 2019 ACUR RDX Mileage: 29,997 Age: 96 Lot: MA BU931378 Balance: \$36,258.51
Retail Status	<input type="button" value="Retail"/> <input checked="" type="button" value="Wholesale"/> <input type="button" value="Sold"/> <input type="button" value="Intercompany"/>	No selection <input type="checkbox"/> Certified	
Purchase From	<input type="button" value="Auction"/> <input type="button" value="Customer"/> <input type="button" value="Honda"/> <input type="button" value="Intercompany"/>	Title No selection	
Title Priority	<input type="button" value="New"/> <input checked="" type="button" value="Used"/> <input type="button" value="Unknown"/>	Title Notes <input type="button" value="Title Notes..."/>	
Sales Consultant	<input type="button" value="Not assigned"/> <input type="button" value="Sales Consultant"/>	Customer No selection	
Date Sent	<input type="button" value="No selection"/> <input type="button" value="Date Sold"/>	<input type="button" value="No selection"/> <input type="button" value="Date Sold"/>	Date Sold <input type="button" value="No selection"/>
Sold Price	<input type="button" value="\$ No selection"/> <input type="checkbox"/> Keys	<input type="checkbox"/> UCI <input type="button" value="No selection"/>	
Online Description	<input type="button" value="No selection"/>	RO Online Notes	<input type="button" value="No selection"/> Add Service
UCI	<input type="button" value="Nothing selected"/> <input type="button" value="Available"/> <input type="button" value="Not selected"/>	UCI RO #	<input type="button" value="No selection"/> <input type="button" value="No selection"/> <input type="button" value="No selection"/> <input type="button" value="No selection"/>
UCI Approved <input type="checkbox"/> UCI Closed			
<input type="checkbox"/> OCI OK No selection			

Missing Date
288

USED CARS - MISSING DATE – this is working correctly

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ADD THESE

Age here will be blank because inventory date is missing

Move model after make

Action	Age	Stock no Vin	Year	Make	Model	Color	Mileage	Lot	Balance	Retail	Certified	Stock Type	Wholesale
	93	O72949XX WBA8B7C5XJA585577	2018	BMW	340XI	GRAY	70,083	MA BVI99464	\$34,621.37	\$32,968	No	USED	No
	93	O72951XX WA1BVAF12KD027142	2019	AUDI	Q8	BLACK	33,446	MA BVI21616	\$60,819.00	\$61,888	No	USED	No

Add Inventory Date to this page – but I would like to be able to update here without going into details page

Title Issues
1 **USED CARS - TITLE ISSUES-** these are cars that the title = no
Group by Retail Status with count

Add Title to this page – but I would like to be able to update here without going into details page

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ADD THESE

Action	Age	Stock no Vin	Year	Make	Model	Mileage	Lot	Title	Priority	Customer	Sales Consultant	Title Notes	
	93	O72949XX WBA8B7C5XJA585577	2018	BMW	340XI	70,083	MA BVI99464	<input type="checkbox"/>	HIGH				
	93	O72951XX WA1BVAF12KD027142	2019	AUDI	Q8	33,446	MA BVI21616	<input checked="" type="checkbox"/>	DONE				

Age based from Inventory date

Group by retail status with count

If check marked title yes....then it will not be on Title issues list

Title Priority

Drop down options with..... New, Low, Medium, High, Problem, Done

W/S Ready To Ship
0

USED CARS W/S ready to ship - these are cars that the title = yes, and Retail Status = Wholesale
Group by retail status with count

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ADD THESE

Action	Age	Stock no Vin	Keys	Year	Make	Model	Color	Mileage	Lot	Title	Balance	Retail	Certified	Stock Type	Wholesale
	93	O72949XX WBA8B7C5XJA585577	<input type="checkbox"/>	2018	BMW	340XI	GRAY	70,083	MA BVI99464	<input checked="" type="checkbox"/>	\$34,621.37	\$32,968	No	USED	yes
	93	O72951XX WA1BVAF12KD027142	<input type="checkbox"/>	2019	AUDI	Q8	BLACK	33,446	MA BVI21616	<input checked="" type="checkbox"/>	\$60,819.00	\$61,888	No	USED	yes

Group by retail status with count

Sales Consultant

Nothing selected → Remove words inside box

W/S Keys Pulled
0

USED CARS W/S Keys Pulled these are cars that the title = yes, and Retail Status = Wholesale, Keys = yes
Group by retail status with count

Group by retail status with count

Age based from Inventory date

If check marked title yes....then it will not be on Title issues list

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Able to edit without going to details page

ADD THESE

Action	Age	Stock no Vin	Keys	Year	Make	Model	Color	Mileage	Lot	Title	Balance	Wholesale	Date sent	Wholesale notes
	93	O72949XX WBA8B7C5XJA585577	<input checked="" type="checkbox"/>	2018	BMW	340XI	GRAY	70,083	MA BVI99464	<input checked="" type="checkbox"/>	\$34,621.37	yes		
	93	O72951XX WA1BVAF12KD027142	<input checked="" type="checkbox"/>	2019	AUDI	Q8	BLACK	33,446	MA BVI21616	<input checked="" type="checkbox"/>	\$60,819.00	yes		

At Auction
0

USED CARS At Auction- same as above plus date sent is not blank

Copy Excel Print

ADD THESE

Action	Age	Stock no Vin	Keys	Year	Make	Model	Color	Mileage	Lot	Title	Balance	Wholesale	Date sent	Wholesale notes
	93	O72949XX WBA8B7C5XJA585577	<input checked="" type="checkbox"/>	2018	BMW	340XI	GRAY	70,083	MA BVI99464	<input checked="" type="checkbox"/>	\$34,621.37	yes		
	93	O72951XX WA1BVAF12KD027142	<input checked="" type="checkbox"/>	2019	AUDI	Q8	BLACK	33,446	MA BVI21616	<input checked="" type="checkbox"/>	\$60,819.00	yes		

Sold At Auction
0

USED CARS At Auction- same as above plus date sold is not blank

Date Sold

5/7/22

Able to edit without going to details page

Copy Excel Print

ADD THESE

Action	Age	Stock no Vin	Keys	Year	Make	Model	Color	Mileage	Lot		Balance	Sold price	Profit
	93	O72949XX WBA8B7C5XJA585577	<input checked="" type="checkbox"/>	2018	BMW	340XI	GRAY	70,083	MA BVI99464	<input checked="" type="checkbox"/>	\$34,621.37		
	93	O72951XX WA1BVAF12KD027142	<input checked="" type="checkbox"/>	2019	AUDI	Q8	BLACK	33,446	MA BVI21616	<input checked="" type="checkbox"/>	\$60,819.00		

Sold at auction group by Sold Date but SUM TOTAL profit for that sold date

Calculate Sold Price – Balance.....balance will not update from CSV file anymore and will remain static

USED CARS filters needed

RETAIL STATUS
UCI
PURCHASE FROM
TITLE PRIORITY
DATE SOLD

Edit form for Job title
Online Manager should look like this.
Online manager can only edit Notes 1 , Notes 2, Other notes

USED CARS – Online – JOB ROLE (inventory Specialist)

Used Cars

Stock no. Vin	072934XX 5J8TC2H55KL023745	Submitted By
Online Description	RO Online Notes	Admin
Other Notes	Vehicle	
USED 2019 ACUR RDX Mileage: 29,997 Age: 96 Lot: MA BU931378 Balance: \$36,258.51		
		Save Changes Cancel

Dashboard view for Job Inventory Specialist

This will show on Online manger Screen.....calculate the percentage of cars from ALL USED that notes 2 = done

All Used	Not done	Ro Closed	Stock no.	Vin	Age	Year	Make	Model	Notes 1	Notes 2
----------	----------	-----------	-----------	-----	-----	------	------	-------	---------	---------

All filter by Age with count

All used from Used car exclude Retail Status = wholesale

All used that Notes 2 <> Done

Percent Done

91%

All used that Notes 2 <> Done &
UCI (from used cars) = Closed

Closed

Dropdowns options
Missing Section
Locked
Sold
Packages
Wholesale

Dropdowns options
RO not Closed
Description RO is done
Wholesale
Sold
Done

If wholesale....highlight all columns in that stock no RED

Format color.

If % is => 90%
If % between 70-89.99%
If % is =< 69.99%

If Done....highlight all columns in that stock no GREEN BOLD

Title Issues

1 USED CARS - TITLE ISSUES- FROM USED CARS TITLE ISSUES - TITLE = NO -----office

View.....CAN EDIT.....title, Priority, Customer, Sales Consultant, Title Notes

ALL Priorities

HIGH

Action	Age	Stock no Vin	Year	Make	Model	Mileage	Lot	Title	Priority	Customer	Sales Consultant	Title Notes
	93	O72949XX WBA8B7C5XJA585577	2018	BMW	340XI	70,083	MA BVI99464	<input type="checkbox"/>	HIGH			
	93	O72951XX WA1BVAF12KD027142	2019	AUDI	Q8	33,446	MA BVI21616	<input checked="" type="checkbox"/>	DONE			

OFFICE EDIT VIEW

Used Cars (Office View) X

Stock no. Vin	O72938XX JF2SKAWC5KH442207	Submitted By
Title Priority	<input type="text"/>	Admin
Sales Consultant	<input type="text"/> Nothing selected	Vehicle
Customer	<input type="text"/>	USED 2019 SUBA FORESTER Mileage: 9,904 Age: 93 Lot: MA BU779144 Balance: \$33,519.00
Title Notes	<input type="text"/> Title Notes...	

Required Days: 2

RDR (RETAIL DELIVERY REGISTRATION) ----pulls data from SOLD LOGS---TATUS, first name, last name, stock no, Vin, certified

NEEDS RULES

New Rule RDR (Retail Delivery Registration)

Year	Make	Model	Model Type	Certified	RDR Type
All option	All option	All option	All option	Yes Used Other	
Year	Make	Model	ALL		
<input type="button" value="Submit"/> <input type="button" value="Cancel"/>					

All will be if it has ANY rule

Buttons: All, TO DO, Waiting Approval

Table Headers: STATUS, First Name, Last name, STOCK NO., VIN, CERTIFIED, DELIVERED, ENTERED, APPROVED, RDR NOTES, NOTES

Annotations: TO DO is if DATE ENTERED is blank; WAITING APPROVAL is if DATE ENTERED is not blank & APPROVED is blank; GROUP by status with count Excluded cancelled.

RDR EDIT SCREEN CAN ONLY EDIT THESE 3 DATES AND RDR

Actions: Copy, Excel, Print

RDR EDIT SCREEN

RDR Details

Date: 05-02-2022 14:39	Status: Pending	
Stock #: 55705	Sales Consultant: John Doe	Certified: YES
NEW 2022 HOND ACCORD Vin: IHGCVIF42NA029081 Mileage: 8 Age: 26 Lot: Balance: \$28,825.39		
JONATHAN	Middle name	FLAKES
Delivered Date	Entered Date	Approved Date
RDR Notes		

Required Days: 4

TRANSPORTATION DAMAGE – separate form from anything else

Done & repair not required goes here

Pending Done

Combine.....location number-damage type-damage severity-damage grid location

Copy Excel Print

Stock no – Vin	Model	Damage	Status

Transportation Damage Details

Stock No. - Vin
55705 - 1HGCV1F42NA029081 NEW 2022 HOND ACCORD

Location Number Damage Type Damage Severity Damage Grid Location

required required required

Edit Cancel

Pending
Repair not required
Done

Default to Pending

See Transportation damage CSV file



These options are related to today's activity of each user?
Also, we still need some more explanation to fully understand this.

For the SMS notification, sir, we are currently assuming "No."
Because we must first have to learn the entire integration procedure of that specific third-party service that you will buy for the SMS. How can we include the SMS service into our application?

Not sure if this is possible..... This is the sales consultant and Delivery coordinator schedule.....

This will be hidden and show with mouse over and would show todays Availability...should be editable from here.

Also should be able to expand to view actual schedule

Availability options

- Available
- With Customer
- Lunch
- Off
- Late
- Called out
- Vacation
- See Notes

SALESPERSON	
ARA	Not Available - OFF
BRAD	Available
CLIFF	
COLBY	Not Available - OFF
DANNY	Not Available - Called Out
DOMENICA	Not Available - OFF
HOMERO	
JHONGER	Not Available - OFF
JIM D	
JOHN M	Not Available - OFF
KAMIYA	Not Available - OFF
KB	Not Available - OFF
MIGUEL D	Available
RANCIER	
SAM	Not Available - w/Customer
SAUL	Available
SIDDIQ	Available
TAYLOR	Not Available - OFF
THOMAS	Not Available - OFF
COORDINATOR	
KEVIN	
LENY	

Dashboard Lot Wizards Used Cars
 Matrix
 Add Sale
 Sold Logs
 Hi Admin

Dashboard | Dashboard

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Capture name of Manager editing this
 This is only editable by Sales Manager
 Also should be able to expand to view actual schedule
Hand-crafted and made with ❤️

Salesperson	Today's Availability	Off BDC note	Manager	SUN	MON	TUE	WED	THU	FRI	SAT
SALESPERSON										
ARA	Not Available - OFF				9 - 7	9 - 6	9 - 6	OFF	9 - 1	10 - 6
BRAD	● Available			ON	8:30-6	8:30-10:30	OFF	8:30-6	8:30-6	8:30-6
CLIFF	● Available			ON	8:30 - 4:30	8:30 - 4:30	OFF	12 - 4:30	8:30 - 4:30	8:30 - 4:30
COLBY	OFF			ON	8:30 - 7:30	10 - 8	8:30 - 6:30	OFF	OFF	9 - 6
DANNY	Called Out				8:30 - 6:30	OFF	OFF	8:30 - 8	8:30 - 6	9 - 6
DOMENICA	OFF				OFF	9 - 8	10 - 8	OFF	8:30 - 6	8:30 - 6
HOMERO	OFF				1 - 8	2 - 8	2 - 8	1 - 8	1 - 6	9 - 6
JHONGER	OFF				OFF	OFF	10 - 8	8:30-8	9 - 6	8:30-6
JIM D	● Available			ON	9:30 - 4:30	OFF	12 - 8	12 - 8	9:30 - 4:30	8:30 - 4:30
JOHN M	OFF			ON	9 - 8	10:30-7:30	9 - 8	OFF	OFF	9 - 6
KAMIYA	OFF				9 - 8	8:30 - 6:30	OFF	OFF	8:30 - 6	8:30 - 6
KB	OFF				10:30 - 8	9:30 - 7	8:30 - 8	OFF	OFF	8:30 - 6
MIGUEL D	● Available				1 - 8	8:30 - 8	OFF	OFF	8:30 - 6	8:30 - 6
RANCIER	OFF				OFF	9:30 - 8	9:30 - 8	10:30-8	OFF	8:30 - 6
SAM	OFF			ON	8:30 - 4:30	8:30 - 4:30	8:30 - 4:30	8:30 - 4:30	OFF	8:30 - 4:30
SAUL	● Available				OFF	9 - 7	9:30 - 8	10 - 8	OFF	8:30 - 6
SIDDIQ	● Available			ON	8:30 - 4	8:30 - 4	8:30-4	8:30-4:30	OFF	8:30 - 6
TAYLOR	OFF				10 - 6	10 - 6	10 - 6	OFF	10 - 6	10 - 6
THOMAS	OFF				10 - 7	10 - 8	10 - 6	OFF	OFF	9 - 5
TIM	OFF			ON	8:30 - 6:30	2 - 8	8:30 - 6	9 - 2	OFF	9:30 - 6

This is one of the things I will need the SMS feature.

Not sure if we create rules For that.

Let me know your thoughts

Required Days: 4

BILLS - this is pulling invoices from Lot Wizards & Used cars

Lot Wizards BILLS

Not Paid

Paid

Repair paid date is blank

Copy Excel Print

AGE	STOCK # VIN	Vehicle	Repairs	Repair Sent	Repair returned	Repair Paid
Leers 4						
77	055615A - HC015389	USED 2017 HOND ACCORD H...	Front Bumper , Rear Bumper , Hood Quarter	3/9/2022	3/22/2022	
42	073159XX - KH112117	USED 2019 HYUN SANTA FE ...	Rear Bumper , Tailgate / Hatch	4/15/2022	4/27/2022	

Group by bodyshop with count

Purchase From Auction Customer Honda Intercompany

Date Sent 05-11-2022

If date sent is not blank it will generate A transportation out bill

TRANSPORTATION BILLS

Not Paid

Paid

If Purchase from = Auction
Will generate a transportation in bill

Copy Excel Print

Date Stock in	Stock No.	YEAR	MAKE	MODEL	VIN	Purchase From	DATE IN PAID	Date Sent	DATE OUT PAID	Notes
4/30/2022	055708B	2006	BMW	X3	WBXPA93466WG78813	Auction				
4/28/2022	073198A	2011	TOYO	CAMRY	4T4BF3EK5BR094425	Auction				
4/28/2022	055742B	2005	TOYO	CAMRY	4T1BE32K75U515129			5/6/2022		

It is possible to have one car that falls in both categories.

If vehicle is purchase from Auction and did not sell and we send back to Action.....this vehicle Would require both date in paid and date out paid before it is considered PAID

Required Days: 2

Write Down

→ Pulls from Used Cars

Write Down will need a rules page in settings

New Writedown Rule

End of Month Age

From ... To

Percent of Balance Balance From Balance To Max Writedown

% \$ \$ \$

Add New

Submit Cancel

Here are what the current write down rules are....need rules because this can change at anytime

Rule end of month age is what the number will be at the end of the month, so if on 5/13/2022 the Used Cars Age from
Is 68....there are 18 days left so the end of month age is 86 days.

Inventory Date 05-06-2022

Write-Down Percentage:

- At day 75 – 10% write-down.
- At day 90 – additional 10% write-down, for a total of 20%.

For vehicles with a cost equal to or greater than \$100,000:

- Same as above, plus
- At day 120 – Additional 5%, for a total of 25%.

Write-Down Caps:

- Vehicles with a cost <\$80,000, \$10,000 total cap.
- Vehicles with a cost of \$80,000 - \$99,999
 - @ 75 days \$10,000
 - @ 90 days \$20,000
- Vehicles with a cost equal to or greater than \$100,000
 - @ 75 days \$10,000
 - @ 90 days \$25,000
 - @ 120 days \$30,000



Dashboard

Lot Wizards

Used Cars

Write Down

Pulls from Used Cars

Matrix

Add Sale Sold Logs

Hi Admin

Required Days: 4

Retail
33

Retail Profit
\$40,307.19

Count how many cars that retail status = Retail
That age will be ≥ 75 days by the end of Current month

Wholesale
1

Count how many cars that retail status = Wholesale
That age will be ≥ 75 days by the end of Current month

MMR vs COST
(retail)
-\$62,294

Total Profit where Retail status = Retail

MMR vs COST
(Wholesale)
\$15,594

These 2 are just math from dollar amount entered in MMR.
Just needs format....if less than 0 format RED, greater than 0 format GREEN

Stock no.	Year	Make	Model	Miles	Lot	Age	Balance	Price	Profit	WRITEDOWN	MMR	MMR vs COST	MMR vs RETAIL
Retail \$182,814.17													

Group by Retail Status The count is SUM Write Down for that retail status

This is the only thing that should be editable.
The others are calculations based on this number

Edit view

Used Cars (Write Down)

Stock no. Vin	072942XX 5NIAZ2BS9LN112402	Vehicle
Write Down	5,853.80	USED 2020 NISS MURANO Mileage: 17,363 Age: 100 Lot: MA CA447806 Balance: \$29,269.00 Retail: \$27,588.00
MMR vs Retail	-1,912.00	Save Changes Cancel
	\$29,500	
	\$231	

To help when doing the math to double check that numbers are correct.....NEXT 2 PAGES are the actual cars form the INVENTORY updated file I recently sent.....that have the math for everything you need to calculate,
MMR is a manual entry

Stock No.	Year	Make	Model	Miles	Lot	Age	Balance	Price	Profit	WRITEDOWN	MMR	MMR vs COST	MMR vs RETAIL
Retail	\$182,814.17												
072942XX	2020	NISS	MURANO	17,363	MA CA447806	101	\$29,269.00	* \$27,588.00	\$-1,681.00	\$5,853.80	\$29,500.00	\$231	\$-1,912.00
072949XX	2018	BMW	340XI	70,083	MA BV199464	101	\$34,621.37	* \$32,768.00	\$-1,853.37	\$6,924.27	\$33,500.00	\$-1,121	\$-732.00
072951XX	2019	AUDI	Q8	33,446	MA BV121616	101	\$60,819.00	* \$60,888.00	\$69.00	\$12,163.80	\$63,000.00	\$2,181	\$-2,112.00
055650A	2019	HOND	ACCORD	22,290	RI 20325191	94	\$22,142.51	* \$0.00		\$4,428.50	\$25,400.00	\$3,257	\$-25,400.00
072983ZZ	2018	FORD	EDGE	56,740	NH 15709876	91	\$29,128.10	* \$27,968.00	\$-1,160.10	\$5,825.62	\$28,900.00	\$-228	\$-932.00
072992XX	2016	TOYO	4 RUNNER	88,075	MA CD752456	90	\$31,020.74	* \$29,968.00	\$-1,052.74	\$6,204.15	\$31,000.00	\$-21	\$-1,032.00
072999	2018	CHEV	EQUINOX	36,421	RI 20664664	86	\$20,739.72	* \$22,868.00	\$2,128.28	\$4,147.94	\$23,700.00	\$2,960	\$-832.00
072773XXA	2019	TOYO	RAV4	39,257	RI 20443946	80	\$28,160.01	* \$29,488.00	\$1,327.99	\$5,632.00	\$31,700.00	\$3,540	\$-2,212.00
072959XXA	2018	CHEV	EQUINOX	73,166	RI 20801013	80	\$18,892.01	* \$20,488.00	\$1,595.99	\$3,778.40	\$19,750.00	\$858	\$738.00
073014XX	2020	LEXU	RX 350	30,191	MA CD955082	77	\$45,567.39	* \$45,777.00	\$209.61	\$9,113.48	\$48,800.00	\$3,233	\$-3,023.00
073020XX	2018	BMW	M2	40,021	MA CD767705	77	\$43,879.68	* \$47,968.00	\$4,088.32	\$8,775.94	\$44,500.00	\$620	\$3,468.00
073021XX	2018	BMW	X2	26,177	MA BU779754	77	\$28,099.79	* \$30,968.00	\$2,868.21	\$5,619.96	\$30,400.00	\$2,300	\$568.00
073022XX	2018	BMW	430I	25,700	FL133160224	77	\$31,346.87	* \$32,968.00	\$1,621.13	\$6,269.37	\$32,600.00	\$1,253	\$368.00
073026XX	2020	JEEP	WRANGLER	23,355	MA CD968527	77	\$47,894.00	* \$47,968.00	\$74.00	\$9,578.80	\$47,000.00	\$-894	\$968.00
073029XX	2017	JAGU	E-PACE	58,965	MA CB065332	76	\$30,903.70	* \$34,968.00	\$4,064.30	\$6,180.74	\$30,800.00	\$-104	\$4,168.00
073033XX	2020	TOYO	RAV4	21,526	MA CD975413	76	\$28,614.00	* \$29,869.00	\$1,255.00	\$5,722.80	\$31,800.00	\$3,186	\$-1,931.00
073036XX	2020	TOYO	HIGHLANDER	9,908	MA CD961989	76	\$40,619.00	* \$41,488.00	\$869.00	\$8,123.80	\$44,600.00	\$3,981	\$-3,112.00
073037XX	2018	TOYO	4 RUNNER	42,071	MA CD961112	76	\$35,375.95	* \$35,968.00	\$592.05	\$7,075.19	\$34,700.00	\$-676	\$1,268.00
073042XX	2020	NISS	ROGUE	11,714	MA CC469531	76	\$22,665.51	* \$24,623.00	\$1,957.49	\$4,533.10	\$26,700.00	\$4,034	\$-2,077.00
073043XX	2017	GEN	G80	37,150	MA CD936601	76	\$28,545.05	* \$28,968.00	\$422.95	\$5,709.01	\$27,800.00	\$-745	\$1,168.00

Copy Excel



Stock No.	Year	Make	Model	Miles	Lot	Age	Balance	Price	Profit	WRITEDOWN	MMR	MMR vs COST	MMR vs RETAIL
073055XX	2018	LAND	DISCOVERY	32,847	MA BU634609	73	\$50,374.93	\$49,968.00	-\$406.93	\$10,074.99	\$49,200.00	\$-1,175	\$768.00
073056XX	2019	SUBA	CROSSTREK	29,764	MA BU507674	73	\$26,023.51	\$26,788.00	\$764.49	\$5,204.70	\$27,700.00	\$1,676	\$-912.00
055710A	2019	HOND	CR-V	51,989	RI 20372793	66	\$24,446.43	\$27,968.00	\$3,521.57	\$2,444.64	\$27,100.00	\$2,654	\$868.00
055719A	2019	HOND	HR-V	25,422	RI 20432653	63	\$21,327.43	\$24,768.00	\$3,440.57	\$2,132.74	\$23,400.00	\$2,073	\$1,368.00
055727A	2019	HOND	CIVIC	23,386	RI 20374155	62	\$21,223.78	\$25,256.00	\$4,032.22	\$2,122.38	\$24,800.00	\$3,576	\$456.00
072828XXA	2021	CHEV	SILVERADO 1500	23,479	CHEVystore...	59	\$47,733.72	\$0.00		\$4,773.37			\$0.00
073078ZZ	2018	VW	PASSAT	3,783	NY 5485690	59	\$20,888.70	\$21,858.00	\$969.30	\$2,088.87	\$25,000.00	\$4,111	\$-3,142.00
073079ZZ	2018	AUDI	Q3	40,829	NJAZ709895	59	\$26,664.70	\$27,768.00	\$1,103.30	\$2,666.47	\$26,500.00	\$-165	\$1,268.00
073081ZZ	2019	CHEV	TRAVERSE	28,572	MA CD529907	59	\$34,594.78	\$34,488.00	-\$106.78	\$3,459.48	\$35,500.00	\$905	\$-1,012.00
073083XX	2020	LAND	DISCOVERY	11,610	CO/USED	59	\$60,300.00	\$61,968.00	\$1,668.00	\$6,030.00			\$61,968.00
055695B	2013	LEXU	RX 350	137,335	RI 20531429	58	\$14,354.62	\$17,968.00	\$3,613.38	\$1,435.46	\$15,450.00	\$1,095	\$2,518.00
073092XX	2019	BMW	X7	14,708	MA BV070698	57	\$78,026.50	\$79,968.00	\$1,941.50	\$7,802.65	\$82,500.00	\$4,474	\$-2,532.00
072968XXA	2011	HOND	CR-V	142,216	RI 20964724	56	\$9,177.54	\$11,548.00	\$2,370.46	\$917.75	\$7,500.00	\$-1,678	\$4,048.00
Wholesale													
072956XXA	2014	BMW	535XI	90,442	DFCU3.9	73	\$7,800.00	\$0.00		\$1,560.00			\$0.00

SOLD

New	Used	Total
20	20	40
<u>Verified</u>		
16	18	34

INTERNET

New	Used	Total
3	5	8
<u>Verified</u>		
2	5	7

AUTOALERT

New	Used	Total
9	4	13
<u>Verified</u>		
8	3	11

LEADS

Unsold	Sold	Total
51	40	91
<u>Verified</u>		
50	34	84

All Last Month This Month

Date	CCS	Last Name	First Name	Entity	Vehicle	Sales Consultant	Sold / Show	New/Used	Source	Notes	Verified
------	-----	-----------	------------	--------	---------	------------------	-------------	----------	--------	-------	----------

Manual entry
REQUIRED

Automatically capture
name of CCS logged in

Manual entry
REQUIRED

Manual entry
REQUIRED

Manual entry
REQUIRED

This is manual
entry
But will be the
unique ID

Manual entry
REQUIRED

Not required

Drop down
from sales
consultant role

Not required

BUTTON
Sold
Show
Default is blank

Drop down
REQUIRED IF
Vehicle is entered

BUTTON
New
Used
Default is blank

REQUIRED

BUTTON
Internet
Auto Alert
Phone Up
Fresh Up
Car Code

NOT EDITABLE TO CCS
ONLY BDC MANAGER

Drop down
OK
Show Verified
Does not count
Last Month

DEFAULT SORT BY SOLD / SHOW
DESCENDING

Filters

Copy Excel Print

DATE RANGE
CCS
SALES
CONSULTANT
NEW/USED
SOURCE

New	Used	Total
20	20	40
<u>Verified</u>		
16	18	34

New	Used	Total
3	5	8
<u>Verified</u>		
2	5	7

New	Used	Total
9	4	13
<u>Verified</u>		
8	3	11

Unsold	Sold	Total
51	40	91
<u>Verified</u>		
50	34	84

All | Last Month | This Month

Filters

Copy Excel Print

Date	CCS	Last Name	First Name	Entity	Vehicle	Sales Consultant	Sold / Show	New/Used	Source	Notes	Verified
------	-----	-----------	------------	--------	---------	------------------	-------------	----------	--------	-------	----------

ADD LEAD

Date	<input type="text"/> <small>required</small> Lead Date	Entity ID	<input type="text"/> <small>required</small>	Client Care Specialist					
First Name	<input type="text"/> <small>required</small>	Last Name	<input type="text"/> <small>required</small>	Sales Consultant					
Vehicle	<input type="text"/> <small>required</small>	New	<input type="radio"/> <small>required</small>	Used	Sold / Show	Show	Sold		
Source	<input type="text"/> <small>required</small>	Internet	Auto Alert	Phone Up	Fresh Up	Car Code			
<small>Notes...</small>									
Business Development Center Manager <small>Verified</small>									
Source	OK	Show Verified	Does Not Count	Last Month					
<input type="button" value="Save Lead"/> <input type="button" value="Cancel"/>									

Capture name of Client Care Specialist submitting Lead

ONLY EDITABLE BY BDC MANAGER (Business Development Manager)

SOLD

New	Used	Total
20	20	40
<u>16</u>	<u>18</u>	<u>34</u>

INTERNET

New	Used	Total
3	5	8
<u>2</u>	<u>5</u>	<u>7</u>

AUTOALERT

New	Used	Total
9	4	13
<u>8</u>	<u>3</u>	<u>11</u>

LEADS

Unsold	Sold	Total
51	40	91
<u>50</u>	<u>34</u>	<u>84</u>

All Last Month **This Month**

Date	Rep Name	Last Name	First Name	Entity	Vehicle	Sales Consultant	Sold / Show	New/Used	Source	Notes	Verified

Count
Sold/Show = Sold & New/Used = New

Count
Sold/Show = Sold & New/Used = Used

Filters

Count
Sold/Show = Sold & New/Used = Used & Verified= ok

Count
Sold/Show = Sold & New/Used = New & Verified= ok

SOLD

New	Used	Total
20	20	40
<u>Verified</u>		
16	18	34

INTERNET

New	Used	Total
3	5	8
<u>Verified</u>		
2	5	7

AUTOALERT

New	Used	Total
9	4	13
<u>Verified</u>		
8	3	11

LEADS

Unsold	Sold	Total
51	40	91
<u>Verified</u>		
50	34	84

All Last Month This Month

Date	Rep Name	Last Name	First Name	Entity	Vehicle	Sales Consultant	Sold / Show	New/Used	Source	Notes	Verified

Filters

Count
Source= Internet & New/Used = New

Count
Source= Internet & New/Used = Used

Count
Source= Internet & New/Used = Used & Verified= ok

Count
Source= Internet & New/Used = New & Verified= ok

SOLD

New	Used	Total
20	20	40
<u>Verified</u>		
16	18	34

INTERNET

New	Used	Total
3	5	8
<u>Verified</u>		
2	5	7

AUTOALERT

New	Used	Total
9	4	13
<u>Verified</u>		
8	3	11

LEADS

Unsold	Sold	Total
51	40	91
<u>Verified</u>		
50	34	84

All Last Month This Month

Date	Rep Name	Last Name	First Name	Entity	Vehicle	Sales Consultant	Sold / Show	New/Used	Source	Notes	Verified

Filters

Count
Source= Auto Alert & New/Used = New

Count
Source= Auto Alert & New/Used = Used

Count
Source= Auto Alert & New/Used = Used & Verified= ok

Count
Source= Auto Alert & New/Used = New & Verified= ok

SOLD

New	Used	Total
20	20	40
<u>Verified</u>		
16	18	34

INTERNET

New	Used	Total
3	5	8
<u>Verified</u>		
2	5	7

AUTOALERT

New	Used	Total
9	4	13
<u>Verified</u>		
8	3	11

LEADS

Unsold	Sold	Total
51	40	91
<u>Verified</u>		
50	34	84

All Last Month This Month

Date	Rep Name	Last Name	First Name	Entity	Vehicle	Sales Consultant	Sold / Show	New/Used	Source	Notes	Verified

Count
Sold / Show = Show

Count
Sold / Show = Sold

Count
Sold / Show = Show & Verified= Show Verified

Count
Sold / Show = sold & Verified= ok

Filters

All Last Month This Month

all to boxes up top with numbers don't have to be clickable
And they also change based on filters.....

All

Last Month

This Month

Date range filter

See attached BDC excel for correct count

In add user CCS role....can we have a color select to show on their view

Other Notes:

CCS can only see leads entered in their name.

BDC MANAGER has access to all CCS leads and can filter to see selected CCS leads

Formats

Verified = ok GREEN

Verified = DOES NOT COUNT RED

Verified = LAST MONTH RED

Verified = Show Verified (match color selected in their user account)

OFFICE

Warranty Cancellation

Required Days: 2

Customer Name	Warranty	Date Cancelled	Refund Destination	Finance Manager	Date Sold	Paid	Notes
---------------	----------	----------------	--------------------	-----------------	-----------	------	-------

form

Add Cancellation

Customer Name	<input type="text" value="required"/>	Finance Manager	<input type="text"/>
Warranty	<input type="text" value="required"/>	Refund Destination	<input type="text"/>
Date Cancelled	<input type="date"/>	Date Sold	<input type="date"/>
<input type="checkbox"/> Paid			
<input type="button" value="Save"/> <input type="button" value="Cancel"/>			

Dropdown from Finance manger Role

If checkmarked PAID then it moves to Paid

Dropdown able to select multiple and able for manual entry.

GAP
MILLENIUM
TIRE
VSC
DENT
SIMONIZ
HONDA CARE

Required Days: 6

Delivery Coordinator

View

this will be for sales consultants to schedule a delivery with a delivery coordinator.
Sales Consultant needs to be able to look at some type of calendar to check for available times.

All	This Month	Last Month	There should a button within the sales consultant Sold logs that will automatically load the customer information When making the appointment with the delivery coordinator						Copy	Excel	Print
Confirmed	Complete	Customer Name	Appointment Date	Time	Coordinator	Stock No.	Vehicle	Sales Consultant	Notes		

Group by coordinator with count

Need filters for
Coordinator
Sales consultant

Appointment Calendar

this will be for sales consultants or sales managers to schedule a delivery with a delivery coordinator. Doesn't have to exactly like this. Sales Consultant needs to be able to look at some type of calendar to check for available times.

There should a button within the sales consultant Sold logs that will automatically load the customer information When making the appointment with the delivery coordinator

Schedule Appointment

TODAY

May 08 - 14							
Day		Week	Month				TODAY
		< May 08 - 14 >					
8	S	9	M	10	T	11	W
12	T	13	F	14	S		
8 AM							
9 AM	LENY	LENY	LENY			KEVIN	KEVIN
10 AM	LENY	KEVIN		KEVIN			LENY
11 AM	LENY	LENY	LENY	KEVIN	LENY	LENY	KEVIN
12 PM	KEVIN	LENY	KEVIN	LENY	LENY	KEVIN	LENY
1 PM	LENY		KEVIN	LENY	KEVIN	KEVIN	LENY
2 PM	LENY		LENY	KEVIN	LENY	KEVIN	LENY
3 PM	KEVIN		KEVIN	LENY		KEVIN	
4 PM	KEVIN	LENY	LENY	KEVIN	LENY	KEVIN	LENY
5 PM	LENY		LENY	LENY		KEVIN	LENY
6 PM	LENY		LENY	LENY		KEVIN	LENY
7 PM							
8 PM							

Delivery Coordinator

All This Month Last Month

Sales Consultant can only submit this form Customer is assigned to them is sold logs.
Sales manager and General manager can select from ALL

This is the form that can be submitted to delivery coordinator

Schedule Delivery

Customer Name	Submitted By	Automatically pull from sold logs
Stock no. Vin	Manager Override	Automatically capture name of person submitting form. Can only be the sales consultant attached in sold logs or Sales manager, general manager.
Vehicle	Capture manager that clicked override	Example...sales consultant 1 sold bob jones. Sales consultant 2 can schedule anything with this customer
Appointment Date	required	The stock no. will be the UNIQUE ID..... Stock no. can only be duplicated if sold status <> cancelled.
Delivery	Spot Delivery required if Additional Service is blank	If stock no. is a duplicate..... REQUIRES MANAGER OVERRIDE
Additional Service	Vin Check required if delivery is blank	Pull from Delivery Coordinator Role
Notes	Required if Additional Service Other (see notes) is selected	Only editable to delivery coordinator assigned Or any sales manager, general manager
Coordinator		
Confirmed	No Yes	Complete No Yes
<input type="button" value="Save Changes"/> <input type="button" value="Cancel"/>		

SMS1 when form submitted..... the delivery coordinator assigned will get a SMS message with the request. The SMS should include Customer Name, appointment date and time, delivery request...and a link to actual appointment created so they can confirm or deny request.

SMS 2.... Confirmed or Denied goes back to person that originally submitted form.
SMS 3.... Completed....SMS to person that originally submitted form.

Required Days: 2

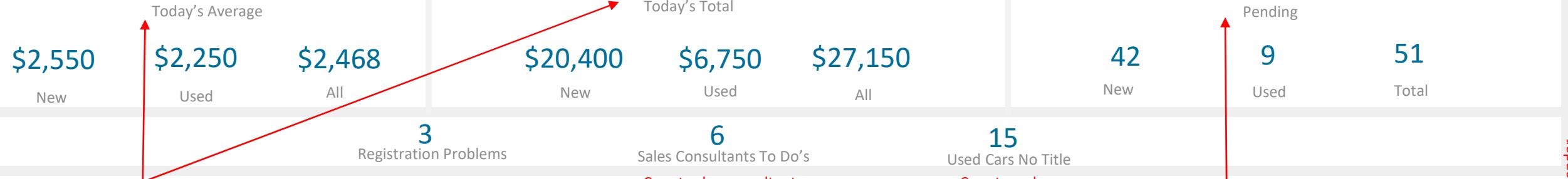
SALES MANAGER DASHBOARD

Dashboard Lot Wizards Used Cars Write Down Title Issues [Sold Today: 8 New, 3 Used, 11 Total](#) Matrix Add Sale Sold Logs Sales Manager

Dashboard

Dashboard

Below buttons are all clickable and goes to that page



Hidden menu with mouse over

MONTHLY CHART

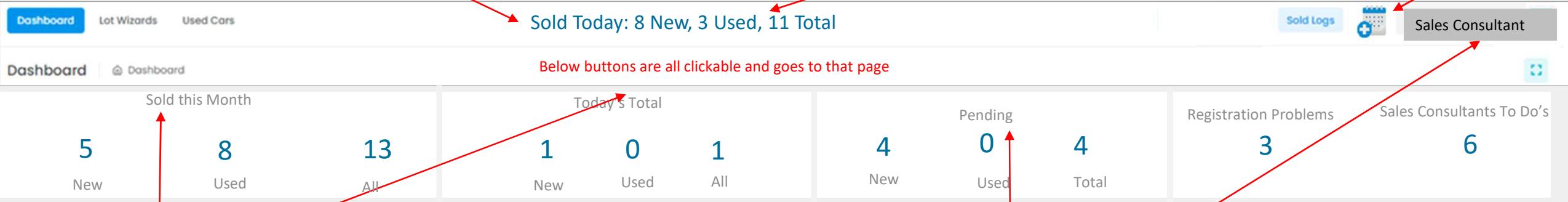
NEW USED

Some type of chart showing this month's sales (DOESN'T HAVE TO LOOK LIKE THIS)....EXCLUDE STOCK TYPE OTHER



Hidden – mouse over to show - sales consultant availability & calendar

SALES CONSULTANT DASHBOARD



Hidden menu with mouse over

Gets from SOLD LOGS

Registration problems page

Count sales consultants
Opened TO DO's

Gets from SOLD LOGS
PENDING a

ONLY ASSIGNED TO THEM

Hidden – mouse over to show - sales consultant availability & calendar

[Dashboard](#)[Lot Wizards](#)[Used Cars](#)[Matrix](#)[Add Sale](#)[Sold Logs](#)[Hi Admin](#)[Dashboard](#) | [Dashboard](#)

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ADDITIONAL REQUESTS

FIX CDK AGE – need a report that pull from INVENTORY CSV file and USED CARS.....where the AGE is not the same

CONTACTS – list of all roles with contact numbers and extensions

COMPANY DEALERSHIP CONTACTS (add, edit, delete) – see excel file

LINKS –WEBSITES ability to add and remove specific links.....and who has access to them

Report – thank you card not done (check box is not marked in sold logs) report show Sold Date Or Reconcile Date (if applicable), customer Name, Sales Consultant

Incentive photos upload is very slow – can the form save and upload in the background?

LOT WIZARDS – RESEND....creates a duplicate for.....maybe add resend to stock no???

SOLD LOGS.....can this page be automatically updated without refreshing the page????

BETTER FILTER OPTIONS?

Remove from all views-

Dashboard

Dashboard

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Toggle fullscreen

