**Friendly Cars Dealership Routine Reports**

**1.2.a – New Car Active Inventory Report:** The report shown in Figure 1.2.a helps the dealership track inventory levels and vehicle details. It provides a summary of all the cars currently in stock, both new and used, with all the essential information about them.

Friendly Cars Dealership

New Car Active Inventory Report

Date of Report: mm/dd/yyyy

Vehicle ID Car Model Color Year of Manufacture Sticker Price Available Customization

XXXXX XXXXX XXXXX YYYY 999999.99 XXXXX

XXXXX XXXXX XXXXX YYYY 999999.99 XXXXX

XXXXX XXXXX XXXXX YYYY 999999.99 XXXXX

**Figure** **1.2.a – New Car Active Inventory Report**

**1.2.b – Sales Summary Report:** The report shown in Figure 1.2.b summarizes overall sales performance. It evaluates dealership sales for a specific period, including total sales value, number of cars sold, and breakdowns by new vs used cars.

Friendly Cars Dealership

Sales Summary Report

Date of Report: mm/dd/yyyy

Date of Sale Vehicle ID Model Type (New/Used) Sale Price Customer Name Salesperson Name

mm/dd/yyyy XXXXX XXXXX XXXXX 999999.99 XXXXX XXXXX

mm/dd/yyyy XXXXX XXXXX XXXXX 999999.99 XXXXX XXXXX

mm/dd/yyyy XXXXX XXXXX XXXXX 999999.99 XXXXX XXXXX

**Figure 1.2.b- Sales Summary Report**

**1.2.c- Used Car Inventory Report:** The report in Figure 1.2.c lists all used cars currently in inventory, including their make, model, mileage, and the price at which they are being offered. It helps the dealership monitor the trade-ins and track which used cars are available for sale.

Friendly Cars Dealership

Used Car Inventory Report

Date of Report: mm/dd/yyyy

Make/Model Vehicle ID Year of Manufacture Mileage at Trade-in Sale Price Manufacturer

XXXXX XXXXX yyyy 99999 999999.99 XXXXX

XXXXX XXXXX yyyy 99999 999999.99 XXXXX

XXXXX XXXXX yyyy 99999 999999.99 XXXXX

**Figure 1.2.c- Used Car Inventory Report**

**1.2.d- Weekly Sales Report:** The report shown in Figure 1.2.d provides a summary of all cars sold during the week, including details of the sale transaction, the salesperson involved, and the car sold. It helps the dealership monitor short-term sales trends.

Friendly Cars Dealership

Week Ending mm/dd/yyyy

Weekly Sales Report

Salesperson Vehicle ID Model New/Used Buyer Sale Date Selling Price Commission

XXXX XX XXX XXX XXX XXX mm/dd/yyyy 9999.99 999.99

XX XXX XXX XXX XXX mm/dd/yyyy 9999.99 999.99

XX XXX XXX XXX XXX mm/dd/yyyy 9999.99 999.99

TOTAL 9999.99 999.99

XXXX XXXXX XXX XXX XXX mm/dd/yyyy 9999.99 999.99

XXXXX XXX XXX XXX mm/dd/yyyy 9999.99 999.99

XXXXX XXX XXX XXX mm/dd/yyyy 9999.99 999.99

TOTAL 9999.99 999.99

XXXX XXXXX XXX XXX XXX mm/dd/yyyy 9999.99 999.99

XXXXX XXX XXX XXX mm/dd/yyyy 9999.99 999.99

XXXXX XXX XXX XXX mm/dd/yyyy 9999.99 999.99

TOTAL 9999.99 999.99

Total of all Sales for Week 99999.99

**Figure 1.2.d- Weekly Sales Report**

**1.2.e- Trade-in Value Report:** The report shown in Figure 1.2.e tracks the trade-in accepted as part of sales transactions, listing the cars traded in, their appraisal value, and the final sales price of the new car.

Friendly Cars Dealership

Trade-in Value Report

Date of Report: mm/dd/yyyy

**Vehicle Traded** **in** **New Car Purchased**

Customer Name [Manufacturer Model Year] Trade-in Value [Vehicle ID Model] Final Sale Price

XXXXX XXXXX XXX yyyy 9999.99 XXXX XXX 99999.99

XXXXX XXXXX XXX yyyy 9999.99 XXXX XXX 99999.99

XXXXX XXXXX XXX yyyy 9999.99 XXXX XXX 99999.99

**Figure 1.2.e- Trade-in Value Report**

**1.2.f- Customization Order Report:** The report shown in Figure 1.2.f lists all customization orders made by customers. It helps the dealership keep track of pending and completed customization jobs.

Friendly Cars Dealership

Customization Order Report

Date of Report: mm/dd/yyyy

Customer Name Vehicle ID Model Customizations Ordered Cost Estimated Completion Date

XXXXX XXXX XXX XXXXX 9999.9 dd/mm/yyyy

XXXXX XXXX XXX XXXXX 9999.9 dd/mm/yyyy

XXXXX XXXX XXX XXXXX 9999.9 dd/mm/yyyy

**Figure 1.2.f- Customization Order Report**

**1.2.g- Customer Purchase History Report**: The report shown in Figure 1.2.g provides a detailed record of purchases made by individual customers, including the cars they have bought, and any customizations or extended warranties added. It helps track customer history and preferences.

Friendly Cars Dealership

Customer Purchase History Report

Date of Report: mm/dd/yyyy

Customer Last Name\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ First Name\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address: Street \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

City \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_State \_\_Zip\_\_\_\_\_

Telephone: Area Code\_\_\_\_\_ Number \_\_\_\_\_\_\_\_\_\_\_\_\_\_

Cars Purchased:

Purchase Date Vehicle ID Model Customization (If any) Asking Price Sell Price Warranty

mm/dd/yyyy XXXX XXXXX XXXXX 9999.99 9999.99 XXXX

mm/dd/yyyy XXXX XXXXX XXXXX 9999.99 9999.99 XXXX

mm/dd/yyyy XXXX XXXXX XXXXX 9999.99 9999.99 XXXX

\_\_\_\_\_\_\_

Total Purchase: 999999.99

**Figure** **1.2.g- Customer Purchase History Report**

**1.2.h- Sales Tax and Licensing Report:** The report shown in Figure 1.2.h is required to document each sale for tax and licensing purposes. It provides the necessary data for state submissions, including taxes, licensing fees, and insurance information. It helps ensure regulatory compliance.

Friendly Cars Dealership

Sales Tax and Licensing Report

Date of Report: mm/dd/yyyy

Vehicle ID Sale Price Customer Name State Tax License Fee Insurance Coverage License Plate Number

XXXXX 9999.9 XXXX 99.99 99.99 XXXX 9999

XXXXX 9999.9 XXXX 99.99 99.99 XXXX 9999

XXXXX 9999.9 XXXX 99.99 99.99 XXXX 9999

**Figure** **1.2.h- Sales Tax and Licensing Report**

**1.2.i- Customer Satisfaction Report:** The report shown in Figure 1.2.i compiles the results of customer satisfaction surveys sent after each sale. It helps Jim assess the dealership’s performance, the quality of customer service, and the satisfaction levels with both the vehicles and the sales experience.

Friendly Cars Dealership

Customer Satisfaction Report

Date of Report: mm/dd/yyyy

**Survey Results (Ratings)**

Customer Name Vehicle ID Survey Date [Salesperson Vehicle Dealership Experience ] Comments

XXXXX XXXX dd/mm/yyyy 0-5 0-5 0-5 XXXX

XXXXX XXXX dd/mm/yyyy 0-5 0-5 0-5 XXXX

XXXXX XXXX dd/mm/yyyy 0-5 0-5 0-5 XXXX

**Figure** **1.2.i- Customer Satisfaction Report**

**1.2.j- Individual Salesperson Performance Report:** The monthly report shown in Figure 1.2.j tracks each salesperson’s performance, detailing the number of cars sold, total sales amount, and commission earned. It helps Jim monitor the effectiveness and productivity of his sales team.

Friendly Cars Dealership

Individual Salesperson Performance Report

Report Starting Date: mm/dd/yyyy Report Ending Date: mm/dd/yyyy

Salesperson SSN Vehicle ID Asking Price Selling Price Date Sold

XXX 999-99-9999 XXX 9999.99 9999.99 mm/dd/yyyy

XXX 9999.99 9999.99 mm/dd/yyyy

… XXX 9999.99 9999.99 mm/dd/yyyy

Total Sales for Period: 9999.99

Total Commission for Period: 9999.99

XXX 999-99-9999 XXX 9999.99 9999.99 mm/dd/yyyy

XXX 9999.99 9999.99 mm/dd/yyyy

… XXX 9999.99 9999.99 mm/dd/yyyy

Total Sales for Period: 9999.99

Total Commission for Period: 9999.99

**Figure** **1.2.j- Individual Salesperson Performance Report**

**1.2.k- Bill of Sale Report:** The bill of sale is generated after each car purchase and provides a complete record of the transaction. It includes car details, customer information, pricing, taxes, customizations, and any warranties applied. A copy is kept for dealership records.

Friendly Cars Dealership

Date mm/dd/yyyy

Bill of Sale Report

Last Name First Name Address Phone

XXXX XXXX XXXX XXXX

Purchases This Year

Date Purchased Vehicle ID Customization Details Sales Tax & Licensing fee Purchase Price

mm/dd/yyyy XXXX XXXX 999.99 9999.99

Warranty Cost

XXXX

Last Name First Name Address Phone

XXXX XXXX XXXX XXXX

Purchases This Year

Date Purchased Vehicle ID Customization Details Sales Tax & Licensing fee Purchase Price

mm/dd/yyyy XXXX XXXX 999.99 9999.99

Warranty Cost

XXXX

**Figure** **1.2.k- Bill of Sale Report**