EPS Advantage Dealer Portal Usage Guide

Portal Usage Guide Contents

Welcome to the EPS Advantage Dealer Portal. This guide will provide a quick reference to getting the most out of the portal. As new features are added or improved we will update this guide appropriately. To stay informed on new features and changes please join our mail list by clicking here (http://somesort of mail list form).

The purpose of this portal is to allow you to quickly mine and refine your dealership sales database for marketing purposes. Currently there are 12 different report types that you can filter your data by. The portal even allows you to segment your customer data in-up-to 5 unique groupings.

Preconfigured **Lead Mining and Refining** options are also provided for even faster results.

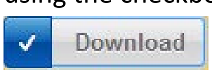
Your Data

We take great care with your customer data. All of our servers are private and utilize advanced security and encryption protocols to ensure we protect your data. In addition to the security in place we have also made retrieval of password and login information something that must be done by us. In case of password loss please contact EPS Advantage directly.

Quick Start Mine & Refine

1. Log into the portal using your email and provided password here – http://advantage.exclusiveprivatesale.com
2. Choose the 

button in your dashboard
3. Select from the **Lead Mining Pre-sets** and click on 

   a. **Equity Scrape:** Coming soon
      i. Find customers with positive equity in their vehicles.
   b. **Model Breakdown:** Segments your sales database into groups based on Vehicle Classes (Cars, Trucks, SUVs, Vans,)
   c. **Fuel Efficiency:** Segments your sales database into groups based high/low efficiency for a particular vehicle class.
      i. **Group 1:** High efficiency cars (
      ii. **Group 2:** Low Efficiency cars (
      iii. **Group 3:** High Efficiency SUVs, Vans & Crossovers (
      iv. **Group 4:** Low Efficiency SUVs, Vans & Crossovers (
      v. **Group 5:** High Efficiency Trucks (
      vi. **Group 6:** Low Efficiency Trucks
   d. **Warranty Scrape:** Segments your sales database into groups based on their warranty status (only based on length of warranty and not KM of warranty).
      i. **Group 1:** All standard manufacturer warranty expired
      ii. **Group 2:** Less than 6 months remaining on powertrain warranty.
      iii. **Group 3:** Comprehensive warranty expired, powertrain remaining (6+ months)
      iv. **Group 4:** Less than 6 months remaining on comprehensive warranty
      v. **Group 5:** 6+ months of comprehensive warranty remaining
   e. **Advanced Options:** Allows for full customization of your segmentation. Choose from multiple report types and variables. See the **ADVANCED LEAD MINING** section below.
4. The results will be output on the next screen where you can choose to exclude specific groups or records by using the checkboxes.
5. 

your selected lead groups. The download will be provided as a ZIP file that you will need to decompress. Each group will be provided as both a CSV and XML file type for easy management. This

Dashboard View → 

This area of the portal will let you access all the Lead Mining & Refining options as well as get an overview of the portal. The current functions are listed below with instructions on how to use them.

Changing your password

1. From the Dashboard () choose **EDIT PROFILE** in the right sidebar.
2. Input your new password into the fields and choose save.

Contacting your account manager

If you need to reach your account manager for any reason you can do so by clicking on their name in the right sidebar under the **MY EPS TEAM**. This will provide both a phone number and email option for contacting them.:

Submitting an Idea for Development or a Problem

Want to see a particular feature or query ability added to the portal? Let us know with the “Got An Idea” button. Just click and you will be able to send an email to our development team. We take each suggestion seriously so we can become your most valuable data and marketing tool.

Had something strange happen or seem to be getting strange results? Contact us the same way and we will open a ticket to determine what the problem is.

Reviewing Past Reports

All reports you run will be saved on your dashboard view. They are organized by the date you ran the report. From the dashboard you can:

- **Edit:** Allows you to adjust the settings of the report group you ran. You can change the event dates, adjust your lead mining settings and change your Private Sale invite settings here
- **Delete:** Allows you to remove this report from the server
- **View List:** Allows you to view the lead list again without downloading
- **Download Report:** Allows you to re-download all the files associated with the report

Logging Out of the Portal

Click the  icon on the left side column to log out of the portal.

Building Your Custom Private Sale Event

The EPS Advantage Portal allows you to create a Private Sale Event with Exclusive Private Sale. You can choose your invite settings, specify your target leads, and even get a cost estimate of your event based on the invites you want to send. All reports and events generated using the 

will be provided in a downloadable ZIP file that will include each lead group as its own separate file.

For ease of use, instructions have been separated into 3 parts:

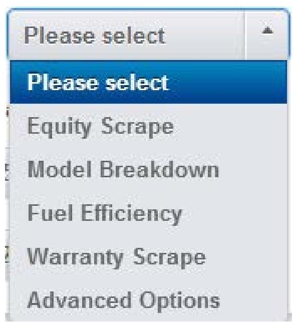
Part 1 – Initial Settings

1. From the Dashboard, select 

2. Select the dates of your event
3. Under "Choose Advertising Options" select 'EPS Advantage' and 

   a. *NOTE: Currently, lead mining only works for "EPS Advantage Invites". Conquest options will be coming in V.2*

Part 2 – Lead Mining & Refining

1. Select the date range of past customer purchasers that you would like to target. This will filter your customer database according to the date ranges you pick.
2. Select your "Lead Mining Preset" - 

and select 

   a. **Equity Scrape:** Coming soon
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      iv. **Group 4:** Less than 6 months remaining on comprehensive warranty

v. **Group 5:** 6+ months of comprehensive warranty remaining

e. **Advanced Options:** Allows for full customization of your segmentation. Choose from multiple report types and variables. See the **ADVANCED LEAD MINING** section below.

3. Fill in the form on the following screen and Confirm. This information is used to help the design team create relevant invites for your event. The more information you provide the better.
4. Review your lead list. Select or unselect and report groups or individual leads you want. This will dynamically adjust the invite count which will reflect on the invite price. When you are done and happy with your list select Confirm

Part 3 – Invite Options

1. Select your invite size and click Next.
   a. The cost/invite can be seen below each of the two sizes. This is based on the number of invites you have as more invites cost less/invite.
2. **Versioning** – by default we select Versioning for you. This is used to create unique invites for each of the different lead groups you have created. If you want all your lead groups to use the same invite deselect this option. Make your selection and click Next
3. **Invite Select Options:** Select the special options that you would like for your invites. The total cost for these will be added to your estimated private sale cost. Click Next
4. **Upgrader Letters:** Select the checkbox if you would like to add Upgrader Letters to your invites. A representative from Exclusive Private Sale will contact you if you choose this option. Click Next once you have made your choice
5. **Review Your Order**: Here you can Download or Submit your reports. If you are satisfied with your event settings, please SUBMIT to Jordan Harnack (your account manager)
   a. **Downloading your report will provide a ZIP file with all the different groups and a PDF report reviewing your selected options and event details**.
   b. Submit will let you email the report link to appropriate people. Select yourself and any account managers that you want to review your order.

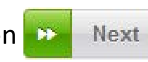
Advanced Database Mining

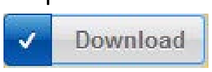
The true power of the EPS Advantage Dealer Portal is in the custom database segmentation you can do in the advanced section. With proper use, you can isolate and exclude specific buyers, target a range of customer records based on basic or more complex variables. Even build opportunity lists based on trade in values, subprime financing variables or even specific trade in value ranges. Combine the various option into 5 different groupings.

Step-by-Step Set-up

1. Log into the portal using your email and provided password here – http://advantage.exclusiveprivatesale.com
2. Choose the 

button in your dashboard
3. Select **"Advanced Options"** from the **Lead Mining Pre-sets** and click on 

4. On initial page load, you will set the options for the 1st group segmentation.
    a. Choose the **REPORT TYPE** from the vertical list on the left. (see below for what option are)
    b. Select or input the variable you would like to filter for. All range inputs require an upper and lower limit to work properly. For lists of variables you can select multiples by holding "ctrl" while clicking.
5. Click on the next LEAD GROUP tab and repeat Step 4.
6. After you have chosen options for an many groups as you want click on 

to receive the output.
7. 

your selected lead groups. The download will be provided as a ZIP file that you will need to decompress. Each group will be provided as both a CSV and XML file type for easy management. This

Query Options:

- **Vehicle Class - T**his report will allow you to segment your customer leads based on one or more vehicle classes. Options include:
    - Full-size Cars
    - Mid-size Cars
    - Small Cars
    - SUVs
    - Crossovers
    - Trucks
    - Vans
- **Transmission Drive Type** - This report will allow you to segment your customer leads based on the Drive Type of the vehicle they last purchased. Options include:
    - FWD
    - RWD
    - AWD
    - 4x4
- **Fuel Economy (combined l/100km) -** This report will allow you to specify a specific fuel efficiency range.
- **Trade In Value –** This report will allow you to specify a desired trade-in value for vehicles. We utilize up-to-date Blackbook trade in values to provide an accurate value.

- **Vehicle Warranty Status –** Want to find all the people that have had their warranty expire? That's what this report will let you do. Choose from 3 options:
    - No warranty remaining
    - Within 6 months of ending
    - More than 6 months remaining
- **Finance Rate –** We left this open to allow you to separate your list based on any finance rate you want. Use this to pull out all of the sub-prime financing customers.
- **Monthly Payment Range –** Target customers based on their monthly payment amount. Fields allow for any range.
- **Power Focus –** Use this report to target buyers of high performance vehicles. We've calculated the power-to-weight ratio of vehicles and will give you all vehicles that have a specific ratio based on vehicle class.
- **Specific Model Pull –** Allows you top separate your list based on a specific vehicle model. Note that this list is based on your particular sales. Only vehicles that you have sold will show up in the options for this. Allows for Make/Model pull but not specific trim levels
- **Fuel Type –** Allows separation of list by fuel type and vehicle class. Choose from Gas, diesel or other and then choose a specific vehicle class(es) that you want in the list.
- **Out of Town/Local –** Separate the customers that are not in your local area.
- **Used vs. New Purchases –** Separate you list into used or new purchasers. Great for excluding people who bought a used vehicle.
- **Competitors Vehicle Purchased –** Separate your list by customers who purchased a used vehicle of another make. Invite them back to purchase one of your brand vehicles.