

# Compass Cars User Manual

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*December 2018*

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## 1 [Introduction]

1. Welcome to Compass Cars! Thank you so much for using our application. It come chalk full useful features for managing your car dealership. Hopefully this user manual will make it easy to make use of it.

## 2 [Create your data]

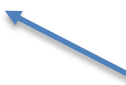
### 2.1.1 [Procedures for Step 1]

To create an account in Compass Cars:

1. Click **Create Account** in the top left corner
2. Fill in the blanks for your first name, last name, and email.
3. Be sure to create a unique password that only you know.
4. Click the drop-down menu in order to select your role at the company.

**New Employee**

First name:	<input type="text" value="Drake"/>
Last name:	<input type="text" value="Whatever drakes last nam"/>
Email:	<input type="text" value="drake@drake.com"/>
Password:	<input type="password" value="....."/>
Password confirmation:	<input type="password" value="....."/>
Role:	<input type="text" value="Admin"/>



5. Click **Create Employee**
6. Congrats! You have just created your account.

**[NOTES, CAUTIONS, and WARNINGS: If you try and use an email that is already in use, the application will prompt you to enter a different one.]**

### 2.1.2 [Procedures for Step 2]:

How to login:

1. Type in the email that you used to make your account.
2. Type in the password you previously made
3. Click on login

## Login

Email:

Password:

Login

[NOTES, CAUTIONS, and WARNINGS: If you type in the wrong email or password, then you will get the error: "Email or password is invalid", and you will need to type it in again.]

### 2.1.3 [Procedures for Step 3]:

Entering your first car:

1. Click on the **Cars** tab in the top right corner.
2. Click on the New car button on the left.
3. Select the **Choose file** button next to **Image** in order to submit a picture of your car
4. Enter in the **Vin #, Color, Make, Model, and Wholesale Price** for your car.
5. Hit the **Create Car** button.
6. You should now be on a confirmation page that tells you the car was entered successfully

Car was successfully created.



Vin: 4566  
Color: blue  
Make: Maserati  
Model: Granturismo  
Wholesaleprice: \$20000.0

Edit

Back

Like this.

[NOTES, CAUTIONS, and WARNINGS: You MUST enter an image for your car.]

### 2.1.4 [Procedures for Step 4]:

Entering your first customer:

1. First...find a customer
2. Then click on the **Customer** tab at the top

- Once you've found a customer, enter their **first name**, **last name**, and **phone number**.
- Click the create customer button.
- Once you've made your customer, it should look like this:

Customers

First Name	Last Name	Phone Number	
billy	bob	123-456-7890	Options ▾
fake	customer	444-555-6666	Options ▾

New Customer

#### 2.1.5 [Procedures for Step 5]:

Entering different types of loans:

- Click the **loan** button at the top.
- Click on the **new loan** button.
- Enter the name of the loan, how many years it's for, and the interest rate of the loan.
- Click on **Create Loan**.
- After you have clicked Create Loan, you should be on a page like this:

Loan was successfully created.

**Loan Name:** Loan 2

**Years:** 4

**Interest Rate:** 3.74

Edit | Back

#### 2.1.6 [Procedures for Step 6]:

Creating quotes:

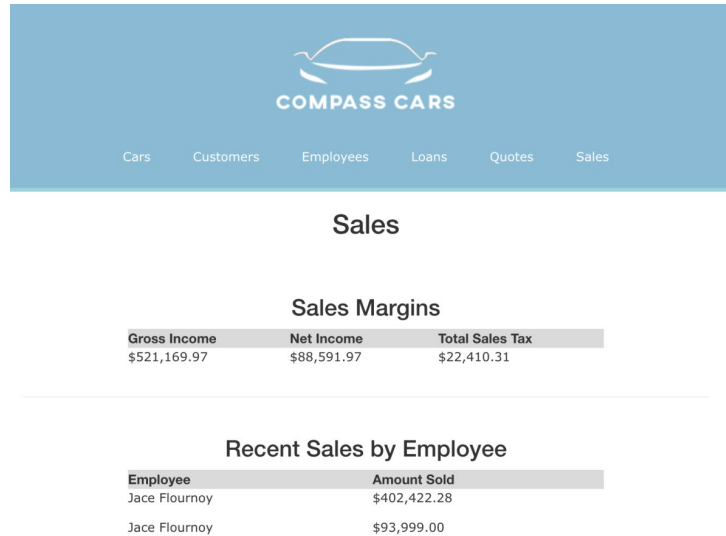
- Click on the Quotes tab at the top.
- Select your customer from the drop-down menu.
- Select the employee making the quote from the drop-down menu.
- Select the car the customer has chosen from the drop-down menu.
- Wholesale price, Markup Value, Subtotal price, and Sales tax should all be filled in automatically.
- Select the loan you wish to use.
- The Total Price will then be shown

8. Mark either as sold or leave it blank.
9. Click on create quote.

### 2.1.7 [Procedures for Step 7]:

Viewing Sales:

1. Click on the sales tab at the top.
2. Any quotes marked as sold will be automatically added to the sales tab



## 3 [Editing your data]

### 3.1.1 [Procedures for Step 1]:

Editing employees:

1. Login as an Admin.
2. Click on the Employees tab at the top.
3. Select the Options button next to the employee you wish to edit.
4. Here you can change your First name, Last name, Email, password, and your role.

## Editing Employee

First name:	<input type="text" value="employee"/>
Last name:	<input type="text" value="worker"/>
Email:	<input type="text" value="worker@work.com"/>
Password:	<input type="password"/>
Password confirmation:	<input type="password"/>
Role:	<input type="text" value="Sales person"/>

### 3.1.2 [Procedures for Step 2]:

Editing cars:

1. Click on the Cars tab at the top.
2. Click on the options button under the Car you want to edit.
3. Select Edit.
4. Here you can re-upload an image of your choice, as well as change the vin #, color, make, model, and wholesale price.
5. Click on update car.

## Editing Car

Image:	<input type="button" value="Choose File"/> No file chosen
Vin #:	<input type="text" value="1234"/>
Color:	<input type="text" value="red"/>
Make:	<input type="text" value="car"/>
Model:	<input type="text" value="car"/>
Wholesale price:	<input type="text" value="300.0"/>

Here

### 3.1.3 [Procedures for Step 3]:

Editing Customers:

1. Click on the customers tab.
2. Click on the options button next to the customer you want to edit.
3. Select the edit option.
4. Here you can edit the customers first name, last name, and phone number.
5. Click on Update customer.


---

## Editing Customer

**First name:**

**Last name:**

**Phone number:**

 Here

|

### 3.1.4 [Procedures for Step 4]:

Editing Loans:

1. Click on the loans tab.
2. Click on the options button next to the customer you want to edit.
3. Select the edit option.
4. Here you can edit the loan name, years, and the interest rate.
5. Click on update loan.


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## Editing Loan

**Loan name:**

**Years:**  ▼

**Interest rate:**

 Here

|

### 3.1.5 [Procedures for Step 5]:

Editing quotes:

1. Click on the quotes tab at the top
2. You have the option of changing the Customer, Employee, Car, and Loan for the quote. The rest will change automatically.

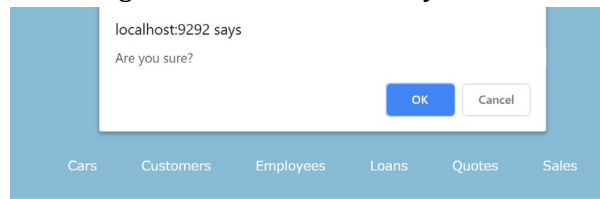


## 4 [Deleting your data]

### 4.1.1 [Procedures for Step 1]:

Deleting Data:

1. The process for deleting data is the same for all the pages.
2. Click on whichever tab you need to delete data from.
3. Select the options tab next to the row you want to delete.
4. Click on destroy
5. You will get the notification “Are you sure?” Click ok or cancel.



#### Customers

First Name	Last Name	Phone Number	
billy	bob	123-456-7890	Options ▾
fake	customer	444-555-6666	Show
			Edit
			Destroy

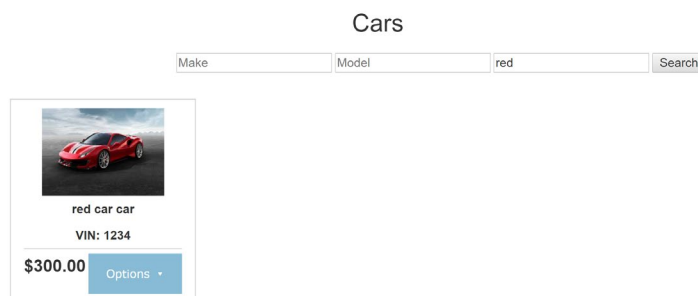
New Customer

## 5 [Searching]

### 5.1.1 [Procedures for Step 1]:

Searching Cars:

1. Click on the cars tab.
2. Search by make, model, or color.



### 5.1.2 [Procedures for Step 1]:

Searching Customers:

1. Click the customers tab.
2. Can search for customers by their first and last name.

**Customers**

First Name	Last Name	Phone Number	
billy	bob	123-456-7890	Options ▾

## 6 [Exporting and downloading PDF's]

### 6.1.1 [Procedures for Step 1]:

PDF Download & Export:

1. Login as a Finance Manager, Dealership Owner, or Admin.
2. Click on Quotes Tab
3. If a Quote exists, select the options button, and choose "Show."


**Quotes**

Customer	Employee	Car	Wholesale Price	Loan	Multiplier	Total Price	Sold	
John Freeman	Jace Flournoy	1GCHK29285E276790 - Volkswagen Beetle	\$20,895.00	3 years - 2.3%	8.20%	\$25,260.06	Sold	Options ▾

Show  
Edit  
Destroy

- 4. Select “Download PDF” to open the PDF and review before printing or downloading.

CarsCustomers



Interested? Contact Compass Cars NOW!!

**Customer:** John Freeman

**Employee:** Jace Flournoy

**Car:** 1GCHK29285E276790 - Volkswagen Beetle

**Wholesale Price:** \$20,895.00

**Loan:** 3 years - 2.3%

**Multiplier:** 8.2%

**Total Price:** \$25,260.06

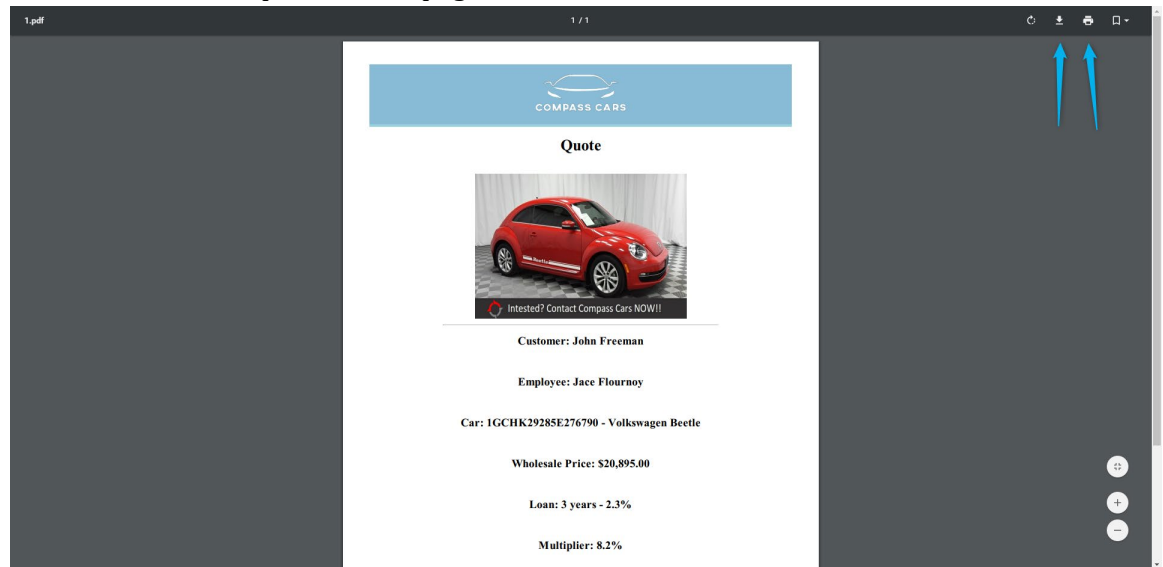
**Sold:** Sold

Download PDF

Edit

Back

5. Use the bar at the top of the new page to Download or Print the new PDF.



6. Press the back button on the browser to return to the previous screen.

**If you encounter issues not addressed by this user guide, please contact your account manager for additional support.**