



Rhino 'Online Booking Portal' Phase 2 Project Spec.

Confidential

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Version 0.2

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Background.

Rhino uses an Online Booking System that allows guests to book onto a Rhino Automotive Sales Event. An Event is typically run at an Automotive Dealer Retail location (a dealership) and Rhino are supplied the Guest List (usually customers deemed by the client to be worthy of inviting to a special sales event, by the Dealership. We have been using a system (system 1) but it has been improved as far as possible and fundamentally its functionality is limited by the structure of the system. A new system (system 2) is required to replace this. The new system is required to add functionality that cannot be retro-fitted into the existing system.

In summary, the system will allow;

- Rhino Admin to create a Rhino Event from a variety of different Event types (styling changes are created as a response to the selection) and for a date range of typically a few days but that could be up to many weeks long, for various vehicle brands including several brands for a single event.
- The event will have a variety of access privileges allowing different access rights to *manage* the event; Rhino Admins, Dealer Managers, Call Handlers, Receptionist and Sales Executives. In addition there are reporting rights for these and an additional hierarchy of members.
- The system will pre-populate a landing page for each Guest loaded into a particular Event, including their personal details to book an appointment with a Sales Executive and accessed via the guest's unique code. The Guest database will be imported as a .csv or .xlsx by Rhino Admin during the event setup and Guests may be CRUD by Rhino admin or the Dealer Manager.
- Guests can book a particular Sales Executive for their appointment depending on availability on the system at the required time. The Sales Executive database will be imported as a .csv or .xlsx by Rhino Admin during the Event setup and Sales Executives may be CRUD by Rhino Admin or the Dealer Manager.
- Sales Executive availability may be CRUD and their calendar displayed and accessed by all setup privileges. The Sales Executive's login allows them to see their own calendar but also allows them the ability to change one of their Guest's appointments by moving this to a colleague.
- Dealer Manager Admins are able to manage all Sales Executives, including their calendars and other management functions for the event. They should be able to move and swap the appointments of the Sales Executives.
- The system should differentiate between Sales Executive that work only on specific brands

in a multi-brand event and also between specialties including new and used and their calendar availability will be affected by these.

- A key function of the system is its ability to provide reporting. Every event that is run will have key stats generated by the system based on the initial Guest database size and then the actions taken from there on such as; appointment made, appointment attended, sale made (as updated by the Sales Executives and Dealer Managers). This data is available for Dealer Managers and Rhino Admins but also aggregated data is available via a Reporting Tool for many additional privilege levels. **The Reporting Tool has been developed and will form the core of the Online Booking System.** The build in in Laravel and development should continue in this technology.
- The system will be able to work in European and global languages for all privileges although Rhino admin can remain as a UK ENG interface.

Key system features.

Appointment Booking: Customer/Guest journey.

A Guest will be allocated a Unique Code that identifies them for each event they are invited to – this is uploaded to the system as part of the Guest list data table. By entering the Unique Code into a Landing Page (or clicking on a PURL which is configured to include the Unique Code) they are taken to an event appointment booking page which allows the user to self-select their preferred appointment, select preferences about their vehicles of purchase interest and complete information about any part exchange they might wish to discuss. The page is branded according to Vehicle Manufacturer Brand, Event Type and also displays the dates of the event.

Designs for system 2 are included here:

<https://xd.adobe.com/view/82e56233-d4bc-4a88-69ac-51c7547b444e-f4d4/>

System Management: Rhino Admin.

Rhino Admin has the ability to set up all aspects of an event including Brand, Event Type, Event Dates, Appointment times and start and end appointment times for each day of the event as well as the import of Guests and Sales Executives and creation of Dealer Managers.

This role allows Rhino to set up clients and events as well as all functions managed by the 'Client Group Admin'. The Super Admin should be able to configure certain functions to be available or unavailable to particular roles. The roles will have default functionality but ideally options should be available to accommodate client need.

System Management: Dealer Admin (Sales Manager).

The Dealer Admin may manage a variety of variables in an event once it is setup, CRUD appointments for any of the team of Sales Executives and access reporting.

Allows a Dealer's Sales Executives to be managed, analysed and reported on as a collective as well as at an individual level.

Client Reception/check-in role.

This role/function should allow a reception staff member easy access to the bookings at the dealership for the day. They should then be able to mark each customer as arrived as they check in. This should be logged on the system.

Also, this role should allow the ability to flag if a purchase was made by a customer and provide the ability to print the calendar by day in landscape format – for purposes of checking people in on the day. This role will be the Dealer Admin role but with some restrictions.

System Management: Sales Executive.

The Sales Executive has access to their own calendar but should they need to manage an appointment, they have specific abilities to do this. Other functions of the Manager Admin are missing.

System Reporting.

A key aspect of the system is its ability to report on data based on an Event's success and data input. This reporting system has a wide range of privileges for different access rights.

The Reporting Tool has already been built (almost Beta) and provides the basis of the new Booking System as its structure and privileges are sound:

- Staging site:

<http://reporter.rhinodeesign.co.uk/>

The Reporting Tool reports on the following based on privilege level:

Events and summary totals from the events between selected date ranges and for brands according to privilege including conversion metrics:

1. Number of appointments
2. Number of sales :
 - a. New
 - b. Used
 - c. OKM
 - d. Demo
 - e. In progress/not signed yet

Privilege levels for Reporting):

1. Rhino Admin

An overview of everything, unstyled:

jordan.dinsdale@rhinogroup.co.uk

2. Manufacturer/Brand Group

The top level manufacturer group (eg incorporating BMW and MINI).

bmwgroup@rhinogroup.co.uk

3. Manufacturer/Brand Level (ALL countries/regions)

Eg BMW or Mini

BMW: bmwmanufacturer@rhinogroup.co.uk

4. National level for Manufacturer/Brand (ALL regions)

Eg BMW UK

bmwuk@rhinogroup.co.uk

5. Regional level for Manufacturer/Brand

Note: Different brands have different definitions of regions. Therefore a particular Dealer site will exist in 'No region' until its region is defined (at Country level by Rhino Admin)

Eg BMW North

bmwnorthuk@rhinogroup.co.uk

6. Dealership level

Reports on the individual dealer's events. A dealership might sell a number of brands so can report on these.

Eg Premium Trade Cars

premiumtradecars@rhinogroup.co.uk

7. Dealer Group level

Dealer Group – reports on a group of dealer sites that exist within the private Dealer Group.

The password is always 'secret'.

The existing system 1.

The present system has a good deal of functionality of the new system and is being actively used, despite its drawbacks. The system (demo) is accessed below and essentially all the functionality plus the new features are required in the new system.

In summary the requirements of the **new system** are;

1. All the features in the current iteration of the existing system (system 1).
2. The reporting module as developed (the Online Reporting Tool) – including all its privilege access rights (the base platform for the new system).
3. Additional features not possible to implement on system 1 (most notably; reporting (ie point 2 above) and handling the calendars of Sales Executives who have dedicated skillsets within the same location. Eg Used or New and multi-brand in the case of a dealership that handles more than a single brand and calendar management setup (the current system is inflexible when creating appointment slots with the same allocation being set for every day instead of being managed to allow daily variation).
4. Integration with an automotive feed to supply vehicle data and images (currently CAP feed but this might change to an alternative that is Euro vehicle-friendly, Jato.com being considered).
5. The new system must be fully language tagged for easy addition of Foreign languages (particularly European) and be able to cope with UTF-8 characters so as to allow European character sets.

System 1 demo may be accessed via these logins:

1. Rhino admin:

This allows creation of Dealer Admins and the Event and also a manual update of vehicle images when the CAP feed does not have a suitable image available.

<https://www.vipevent.co.uk/demo/login>

User: adminx

Pass: TIN1p\$yySp1

2. Dealer Manager Admin:

This allows the Dealer Manager Admin to manage their event including access to all Dealer Admin's calendars for their Event.

<https://www.vipevent.co.uk/demo/login>

User (includes spaces): MINI Sales Manager

Pass: secret

3. Sales Executive:

This allows the Sales Executive to view and manage their calendar and appointments.

<https://www.vipevent.co.uk/demo/login>

User (includes spaces): MINI Sales Exec 4

Pass: secret

4. A guest:

The guest can log in using a Unique Code allocated to them and on the system to book an appointment. They are sent an invite by post or e-mail and going forward this should be a PURL if sent via email so that clicking the link in the email takes the guest directly to their booking.

<https://www.vipevent.co.uk/demo>

eg: Daniel Holland

Unique Code: 10665187AT

System 2 functionality improvements.

Note that below are comparisons to the existing system 1.

Front end (customer view).

Improve customer journey UI/UX.

- Option to not specify sales execs when booking or at least put sales execs before appointment times.
- Clearer calendar overview and selection with all days at once.
- Having the option to select 'New or Used' rather than "just new" or "just used" for the model they are looking to buy would be good.

Dealer location at confirmation.

- On booking confirmation screen (and in confirmation email) include 'how to find us' – location map/pin on Google maps. (Later option – required Google API/billing).

Customer journey 'add to calendar' function.

- On booking confirmation screen (and in confirmation email) include 'add to calendar' the ability for the customer to add their appointment to their personal calendar (main calendars: outlook/google/ics – according to the plugin/service used).

Handle 'Authority to get settlement'.

- On the customer journey add the facility to allow a customer who adds a part exchange to tick a box and permit the dealer to see this information related to the customer. Optional set up in Rhino Admin (default is NO so hide if selected in Rhino Admin)
 - Provide a facility for view/download of customer names that have this information (by configurable option – set in Group Admin).

Customer self-serve booking amendments.

- Allow a customer to change their booked appointment via the online system – provide contact details but also allow them to amend according to diary (allow this function to be a selectable option for Rhino/group/dealer admin).

Sales Exec functionality.

Improve UX generally.

- Facilitate a way to flag that a customer has been sent a confirmation letter (by the dealer).

Manual appointment time over-ride function.

- Allow the sales executive to override the set appointment time if they agree this with a customer. Eg if a slot is 1030-1200 but the customer can only arrive at 1100, allow this to be changed. This update should be reflected in a service email. The system should deal with the issue of shortened appointment – ie this appointment would then be 1100-1200 if a 1200 is already allocated as an appointment slot
- These settings should be available in Group Admin:
 - a. Allow sales execs to alter appointment start time.

Allow easy change of appointment.

- Allow the Sales Exec to **swap** an appointment with another Sales Exec and deal with availability in doing so. (Group Admin selectable function).

Group Admin functionality.

View own online diary configuration.

- Some managers do not want Sales Execs to have access to their calendars. Make this view optional in Admin.

Daily appointment configuration.

- Allow **Group Admin** to configure appointments:
 1. Days
 2. Time slots (default 1 per day but allow more than 1 per day to make day fully user configurable)
 3. Time slot duration (Rhino admin defined time slot durations)
 4. Time slot start time

The above allows different configurations for different days if required by Group Admin.

Allow upload via CSV.

- Include header template ready for download which includes example data in row 1 (ignored by system if reimported)

Allow customer preference management.

- Preferences should be available – ie how customer is communicated with for marketing; post / email / SMS.
- The list of preferences should be available for download as a CSV so that dealers may import back into their own systems if needed.

Suppression list upload.

The system should allow a preference suppression list to be uploaded in case a dealer provides this after an event has been set up. This data is then passed through the system untouched unless the customer changes this in their preferences.

New / Used sales execs shared calendars option – customer journey allows selection of different brands.

The ability for a dealership to deal with new and used sales execs where some may only deal with one of these and others may sell both.

- Ability for a single site diary to be managed by the separate sales executive type
 - To be able to tag sales execs as having the ability to sell new and used or new OR used only. This would mean that the system (or a customer) could not book a sales exec from the 'wrong' speciality and that if a sales exec was able to sell both but was already booked on an appointment, they would not then be available to book for a different type at the same time.

Rhino Admin functionality (additional to Group admin rights).

Improve calendar overview/management for call handler.

- Having separate links for everything makes it all very confusing ie having a separate one for a call handler and then for Dealer Admins. The role we have in CRM often means we need to do a bit of both (viewing the diary as a whole so it's easier to glance at who is in on what day so we can easily tell a customer when their sales specialist is available). At the moment we are having to have the two separate pages open. It would be a lot easier to use if it was more like an excel spreadsheet type diary system.

Multi-language capability.

- System should deal with different languages for compulsory for ALL privileges/views (exception being Rhino admin which is optional/nice to have).
- Which languages are available to each event should be configurable by Rhino admin.

Image upload for New/Used car image selection.

- Improved ability to upload images for vehicles and use the image from the feed if available, or the uploaded image. By default, an uploaded image should override the feed image. Create a notification in the system when

new feed images are received (only display max 1x alert at a time) so user can decide whether to use the saved image or new feed image.

Dual/multi-brand events facility.

- The ability for a dealership with multiple brands to be able to offer these. This should include the following functionality:
 - Ability for Admin (Rhino) to select the colour theme for the front end and client logins.
 - Ability for Admin to add multiple logos and for these to be visible on the front end and back end of the system.
 - Ability for a single site diary to be managed by the separate brands.
 - To be able to tag sales execs as having the ability to sell all brands or only selected ones. This would mean that they system (or a customer) could not book a sales exec from the 'wrong' brand and that if a sales exec was able to sell multiple brands but was already booked on an appointment, they would not then be available to book for a different brand at the same time.

Ability to configure the front end message (landing page of customer journey) via CMS function.

- Allow option for rhino Admin to change the landing page greeting: ie 'Dear' [Salutation] [lastname] or 'Hi' [Firstname].
 - Add suitable fallbacks for when data is missing. Eg if set to 'Hi firstname' but firstname is missing in data source then change to Dear [Salutation] [lastname] and if this is missing change to 'Hello' (or CMS editable fallback).
 - This should be selectable in Rhino Admin who can decide if the option is shown to the Dealer Admin level.

Editable landing page and fonts for brand.

- The front end of the customer journey should allow the imagery and branding from the event to be applied by Rhino Admin so that each event can have an on brand welcome page.

Ability for Rhino Admin to create an event and add guests later.

- Instead of creating an event at the same time, facilitate creating an event but adding guests later.

Ability for Rhino Admin to delete events and remove all data.

- Allow deletion of customer data from the system based on ALL or selected events. Ensure confirmation dialogue is in place and only for Rhino Super admin.

General/System functions.

Allow Username OR email address for login.

- Some dealers use a shared email. Therefore, individual dealer logins should include a unique username. Login should therefore allow dealers/sales executives to login using a username or an email address. If duplicate email addresses are on the system, login using an email address should not be permitted and user must use their username (and password).

Emails.

Emails configuration options.

- Allow configuration option to enable/disable system emails eg Appointment confirmation emails sent to Sales Execs.
- Add a service email to the Customer from Dealer/Sales Exec to notify of appointment change.

Email content.

- Include customer address in confirmation emails (to facilitate packs).

Various issues raised in phase 1 launch that should be considered:

- Use unique codes that have some relevance to the dealership (organisation rather than system issue).
- If you select a date, then changed your mind and chose a different date, the system does not recognise this and will only show the sales specialists available for the original date you chose.... unless you then click on a time. Clicking on a time sorts this out, but a customer wouldn't know this.
- The list of booked guests can be downloaded from the system but it didn't let you know what day/time the customer had booked for and with what Sales Specialist, this was then added. The same spreadsheet also showed if a customer was active or had cancelled but it wasn't long before that stopped showing.
- Online Booking Form: needs to be clearer that they need to provide valid email addresses of the sales team.
- IF customer opts out of having their sales execs receive confirmations/logins, NEEDS to be a better solution for inputting email address – when email address is faked the customer who makes the booking receives a bounce back email:

☆ Mail Delivery System

Inbox - Rhinorevents 0

Mail delivery failed: returning message to sender
To: sophia.canale@rhinorevents.com

This message was created automatically by mail delivery software.

A message that you sent could not be delivered to one or more of its recipients. This is a permanent error. The following address(es) failed:

salesexec1@hendy-group.com:
SMTP error from remote server for TEXT command, host: hendygroup-com01c.mail.protection.outlook.com (104.47.1.36) reason: 550 5.4.1 All recipient addresses rejected : Access denied [VE1EUR01FT032.60P-EUR01.prod.protection.outlook.com]

--- The header of the original message is following. ---

Received: from www.vipevent.co.uk ([54.37.17.167]) by mrelayeu.kundenserver.de (mreue012 [212.227.15.163]) with ESMTPSA (Nemesis) id 1N6sON-1h3VnH2QF-018H6B; Fri, 01 Mar 2019 10:27:56 +0100
Message-ID: <4424a8f61e4652090c384d35847d8e5@www.vipevent.co.uk>
Date: Fri, 01 Mar 2019 09:27:56 +0000
Subject: You have a new booking
From: Christina Clark <sophia.canale@rhinorevents.com>
To: Sales <salesexec1@hendy-group.com>
Cc: hendyportsmouth@rhinorevents.com
MIME-Version: 1.0
Content-Type: multipart/alternative;
boundary="= swift.1551432476_aef9611fd90a81eeacc6a629fd9a4023_=" "
X-Provags-ID: V03-K1:zFMU19n9ZVnz5OcJsK56plIF8Fs/k9znYXkd/11xdlgP
B4elfyrwLJNBLBY2UlbQbyLJkhhUB9wcR692+NSNs4vAGZzMGVM95cJlVBMv3ZnkoJ
QC1TyLEKpaKh9FRhUFxhm0LS3nxVU4bxBNYPHv09SedEFAuN4vtcSpovWdloBvkdExNvV8C
Om52OwZla8hQuIvxC+g==
X-Spam-Flag: NO
X-UI-Out-Filterresults: notjunk:1;V03:K0:ONWuLLJqVY4=-vRoJ+RldRxxAtMG0UjKWM
oShFOgQNBbMvGlu8HcUBnVRJzc0lg9WApexqh1zVnkbEmcWgYOTIZaYRrAlPkyDaCXdlbz
rpinFKGE0EzLB7M7HYFh6ZK95ocVw6LDJ3k8yrr14GQeQVoyrOfRsaDUjPHHGs9dJfBl
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lMlIAOBZG7GSuisULGpBylUW5A4OW9ldCMOSlt1W+TePhaTNYEqo2hvG5BNaRrJHHRoL5UK
LoU9GJu7Al01CbDvOmKZCjXHzdWegC06kIngDkP3kxqxPjKwPPFGPKyM0K13ylqclQ1ZAU
z15YXz8k0Tn6jSSe6vO6IdKFRc6rnpXTJHbgT4kLhPZ8i9y72CJbl4QNOYzCgNelN+JEHQ
7d+wnjK253cd12lVklNygltQ50jKdUjFleACndTw6CMUMU7mEdUcpXmTxu7LEGKGFbAplSI
hmetOOIPszKz6YMBdjmC3nWW9lrgskvMxyEKAV0VZB02VHO7hu2Kqo+ahFQsQOsQ7q18ACf
PMHrBdtwv3av6MIH5VGwFA9f+d8Qb1zCHJcz24nSEpHurwJ+5ExzRFgVEHb17BxW+sinYQS
JcFZjsISXRTwYvOW++w4sRjDwd9gZzYU5Df0FvOhadF+AtxUlw+G1n2B8qzSWirE7LhKg2
S+JAioJmHkUrsPSEaKhmgB9aFj0bozXRZIB3w8sDIPVzFp4wTwyx83ssWoAgD+n85x3YbVv
N28q1g4

- Confirmation email to no longer say “Dear Surname”?
- Customers also receive out of office emails from the Dealer Admins.
- Longer car names disrupt the layout of the pictures in the customer process.
- Blank codes – confusion over using them more than once.
- Icons on Dealer Admin and customer process not aligned perfectly.

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