

# ADMIN MANUAL

TM



# **INFORMATION COVERED**

- DEALER SETTINGS
- PERSONAL SETTINGS
- INTERNET SETTINGS
- SALES PROCESS

## Dealer Settings

The screenshot shows the 'Dealer Settings' application interface. At the top, there are tabs for CRM, Inventory, Reports, and Settings. Below these are sub-tabs for Dealer Settings, My Settings, User List, Websites, Dealer Hours, ILM/CRM Settings, and Billing. The main header indicates 'Edit: Example Dealer - VinStickers (VS #1)'. The interface is divided into three main sections: Basic Information, Billing Information, and Dealer Contacts. The Basic Information section contains fields for Dealer Name, Address, City, State, Postal Code, Phone, Fax, Web Site, and Forms Client #. The Billing Information section contains fields for Name, Email, and checkboxes for 'Include billing name on invoice address' and 'Use separate billing address?'. The Dealer Contacts section contains fields for Used Internet Manager Contact, Export Contact, New Internet Manager Contact, and Import Contact, each with Name and Email fields.

The DEALER SETTINGS are where name, address, phone numbers, billing information, inventory settings, leads address, and dealer contacts are found and verified.

The BASIC INFORMATION section contains all the dealerships contact information and can be changed by typing the new information in the fields and clicking save.



Any time the save button is available make sure to click save or the information is lost.

## Billing Information

### Billing Information

The screenshot shows the 'Billing Information' section of the Dealer Settings application. It contains a form with the following fields: Name (Matt), a checkbox for 'Include billing name on invoice address', Email (matt@vinstickers.com), and a checkbox for 'Use separate billing address?'. There is a help icon next to the 'Use separate billing address?' checkbox.

The BILLING INFORMATION houses the name and e-mail address of the accounts receivable contact.

## Dealer Contacts

The screenshot shows the 'Dealer Contacts' section of the Dealer Settings application. It contains a form with the following fields: Used Internet Manager Contact (Email: mwatson@vinstickers.com, Name: Sales, Phone: (800) 980-7488), Export Contact (Name, Email), New Internet Manager Contact (Email: sales@vinstickers.com, Name, Phone), and Import Contact (Name, Email). There are help icons next to the Phone fields for the Used and New Internet Manager Contact sections.

The DEALER CONTACT area houses the internet director's contact information and any persons responsible for inventory exports and imports.

## Dealer OVE Settings

Manhiem OVE Enabled: ☒ ?

Username:  Password:

Seller First Name:  Seller Last Name:

Seller Phone:

Seller Fax:  Seller Email:

The DEALER OVE SETTINGS are the Manhiem controls for pulling the inventory from the DMS. If the dealership uses this service the passwords, username, phone number, and seller name can be confirmed here.

## Inventory Settings

Default Warranty:  [Manage Warranties](#) ☐ Underline all "Systems Covered" text

☐ Do not print price on window stickers by default ? ☐ Override prices with imported price from DMS ?

☐ Do not send prices to online classified sites ? ☐ Override mileage with imported mileage from DMS ?

☐ Do not export pre-owned vehicles without photos ? ☒ Distribute inventory by default ?

☒ Do not export pre-owned vehicles without prices ? ☐ Do not export new vehicles without photos ?

☐ Do not export pre-owned vehicles without prices ? ☐ Do not export new vehicles without prices ?

Default Comment:

Default Comment: (New cars)

If you would like, you change all vehicles in inventory to have the current default comment.  
**Please note that this will clear all current comments and that there is no way to undo this!**  
[Change All Pre-owned](#) [Change All New Cars](#)

INVENTORY SETTINGS is where you manage the prices, comments, printing, and photos for the dealership's inventory. The default comments can be quickly reset for all vehicles in the inventory.

ADF leads represents the address for the ILM/CRM tool to pick up leads in the ADF XML standard.

☐ Do not show prices on inventory plug-in ?

☒ Disable Basic Email Alerts ?

Used ADF Leads Email:  ?

New ADF Leads Email:  ?

☐ Hide vehicles without photos ? ☒

☐ Hide vehicles without prices ? ☒

Display "less" equipment: ☐ Used cars ☐ New cars

The INVENTORY GALLERY SETTINGS controls where all the leads are filtered to. This area shows the leads address for all ADF/XML formatted leads. The non-ADF/XML leads will require a separate address. In this area check boxes are available for hiding the vehicles with out photos or prices. Also check boxes to display vehicles without the equipment.



From the main tab of the Dealer Settings area the EBAY MOTORS SETTINGS can be controlled. By Clicking on the eBay Settings a pop up window appears. Here the user ID, contact information, and dealer information is set.

#### Local Markets Settings

The LOCAL MARKETS SETTINGS is for those who wish to only list inventory in their immediate area.

#### Payment Settings

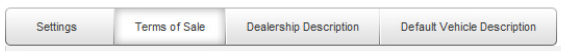
The PAYMENT SETTINGS control when and how the dealership will receive payment for sold eBay items.

#### Alerts & Notifications Settings

The ALERTS AND NOTIFICATIONS SETTINGS control where the correspondents from the bidder is directed.

#### Layout Settings

The LAYOUT SETTINGS and the Banners control how the over all listing will appear. The banner can be an up loaded image from a hard drive.



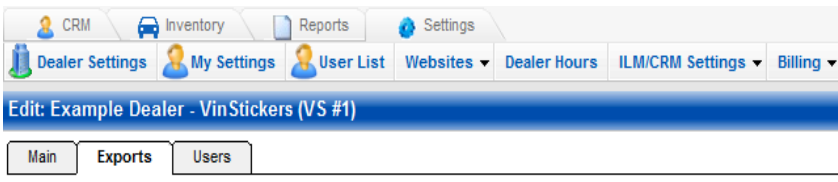
The Terms of Sale allows the dealership to describe the deposit, payment, taxes, inspection, shipping, and warranty information to the customer.

The Dealership Description area allows for a brief description of the dealership.

The Default Vehicle Description is applied to all vehicles listed using the eBay listing.



Make sure to click the save button when finished making modifications.



The Exports area is available to the dealer to confirm where the inventory is being exported to and if those locations are enabled. To add or modify this list please contact VinSupport.

Main Exports **Users**

Below is a list of users for this dealership, not including yourself. You can edit or delete other existing users, or click "Add" to add a new user to your dealership.

[+Add](#)

	Username	First Name	Last Name	Access
	Demo	Dave	Watson	Account Manager
	test	test	test	Inventory Manager
	Test Demo	Davy Jones	Watson	Account Manager
	demonatt	Matt	Watson	Salesperson
	demonike	Mike	Connelly	Account Manager

The Users tab of the Dealer Settings area is available for deletion of users only after all customers have been resigned.



The My Settings area allows a user to modify his or her personal information. This contact information is used by the system for the auto fill fields and the lead assignment controls.

The user name can not be changed. The password can be reset. The password must be at least 7 characters long containing at least 1 capital letter and at least 1 number.

The phone numbers and e-mail address are used by the auto fill fields and for the managers when they are looking for a salesman's personal information.

The Hours of operation are just for the particular user being edited. This information controls when the activity alerts will fire, when leads are received, and will be listed on the Vin-Supported web site.

The Photo area is for a photograph of the user. This can be shown on the Vin-Supported web site, kiosk, and the e-mail signature.

The Activity Alerts are set to come to a cell phone or email address. These alert the user of any of the following activities; new internet lead received, lead transferred, lead e-mail response received, and appointment reminder.

The Alert Address is set up as no alerts, text messages, e-mail with HTML or e-mail with out HTML. Alerts can be opted out of if the user does not want to receive certain kinds of alerts. The common carrier codes are listed on the right hand side of the activity alerts screen.

**Advanced Settings**

User Information | Activity Alerts | **Advanced Settings**

**Account Manager**

Title: Best-est Ever  
 Department: Sales  
 Sales Team: Delta Force (manage)  
 Show on website: ☒  
 Show on CRM kiosk: ☒

**Inventory Access:**  
 ILM/CRM Access: Admin  
 System email: alexmoore@test.vinleads.com  
 Receive Leads: ☐  
 DMS #:

**Assigned Manager:** Davy Jones Watson  
**Assigned CSI Agent:** -- Pool --  
**Assigned BD Agent:** C Dub  
**Assigned Service Rep:** -- Pool --

**Re-Assign Leads**  
 This user has 12 customers.  
 You can re-assign the customers to another user.  
 Alex Moore  
 BD Agent  
 C Dub  
 Chris Moore  
 Cliff Murphy  
 Dave Watson  
 Davy Jones Watson

**User Types**

☐ Salesperson  
☐ Internet Salesperson  
☐ Manager  
☐ BD Agent  
☐ CSI Agent  
☐ Service Rep  
☒ GM  
☐ GSM  
☐ Service Manager  
☐ Finance Manager  
☐ Finance Director  
☐ Dealer Principle  
☐ Orphan Salesperson  
☐ Service Department  
☐ Parts Department

The ADVANCED SETTINGS area houses most of the user's access levels and dealership roles.

**Account Manager**

Title: New Car Manager  
 Department: Sales  
 Sales Team: Manager (manage)  
 Show on website: ☒  
 Show on CRM kiosk: ☒

The ACCOUNT MANAGER section covers the user's title, department, group or team. The check boxes indicate whether a user will appear on the Vin-Supported web site and the kiosk.

**Inventory Access:**  
 ILM/CRM Access: Admin  
 System email: alexmoore@test.vinleads.com  
 Receive Leads: ☐  
 DMS #:

The ACCESS area allows the user to use the MotoSnap software. There are two accesses. One is for the inventory and one is for the ILM/CRM itself. The system email can be changed and is the address that is registered to that user in the VinSolutions software. Check marking the receives leads box allows a user to receive internet leads. The DMS number is used to associate the user with deals pushed from the DMS.

**Assigned Manager:** Davy Jones Watson  
**Assigned CSI Agent:** -- Pool --  
**Assigned BD Agent:** C Dub  
**Assigned Service Rep:** -- Pool --

The ASSIGNED area is where the user is set and associated with either a manager, CSI agent, BD agent, or service rep. These can also be set to pool, meaning the associated tasks will be round robin.

**Re-Assign Leads**  
 This user has 12 customers.  
 You can re-assign the customers to another user.  
 Alex Moore  
 BD Agent  
 C Dub  
 Chris Moore  
 Cliff Murphy  
 Dave Watson  
 Davy Jones Watson

**Re-Assign**

The RE-ASSIGN LEADS section allows all customers associated with the user to be assigned to one or more people within the dealership. This must be done prior to deleting a user from the system.

**User Types**

☐ Salesperson  
☐ Internet Salesperson  
☐ Manager  
☐ BD Agent  
☐ CSI Agent  
☐ Service Rep  
☒ GM  
☐ GSM  
☐ Service Manager  
☐ Finance Manager  
☐ Finance Director  
☐ Dealer Principle  
☐ Orphan Salesperson  
☐ Service Department  
☐ Parts Department

The USER TYPES section identifies the responsibilities of the user. The tasks from the sales process are connected to this feature. If a user is marked as the GM of the dealership then any sales processes marked to come from the GM will pull from this user's information area. An example being the e-mail signature for an automated e-mail.



## User List

The User List displays the list of all unique users in the system. The list displays information on the users last known login, wither they receive leads, the access level, user id, name, and email address.

User List				
User Info	DMS ID	Inv. Access	Rcv Lds	CRM Access
<b>Group: BDC</b>				
<a href="#">edit</a> BD Agent (bdagent) bdagent@test.vinleads.com		Account Manager		Manager ( <a href="#">view as</a> ) BD Agent
<b>Group: Demo Accounts</b>				
<a href="#">edit</a> Dave Watson (Demo) demo@test.vinleads.com		Account Manager		Manager ( <a href="#">view as</a> ) CSI Agent
<a href="#">edit</a> Davy Jones Watson (Test Demo) frankly@test.vinleads.com		Account Manager	Yes	Manager ( <a href="#">view as</a> ) Manager
<a href="#">edit</a> Matt Watson (demomatt) matt@test.vinleads.com	1	Salesperson	Yes	User ( <a href="#">view as</a> )
<a href="#">edit</a> Mike Connelly (demomike) mike@test.vinleads.com		Account Manager	Yes	Admin ( <a href="#">view as</a> ) Manager

<b>Group: Manager</b>
<a href="#">edit</a> Alex Moore (amoore) alexmoore@test.vinleads.com
<a href="#">edit</a> C Dub (cdub) cdubdub@test.vinleads.com
<a href="#">edit</a> Chris Moore (cmoore1) cmoore@test.vinleads.com
<a href="#">edit</a> test test (test) testemailaddress@test.vinleads.com
<a href="#">edit</a> Tom Stromboli (tstromboli) stamasir@test.vinleads.com

The User Information section displays the user's name, login id and e-mail address. The edit button will allow the admin to make changes to other user's personal settings.

### DMS ID

235

The DMS ID is the number associated with the salesman in the DMS. This allows for the nightly sync to know what salesman is listed on the deal.

### Inv. Access

Account Manager

The Inventory Access section displays what level the user has to the vehicle information and vehicle settings.

### Rcv Lds

Yes

The Receive Leads section shows if the user is marked to receive leads. There will be a "Yes" displayed if they are marked to receive leads of otherwise it will be blank.

### CRM Access

Manager ([view as](#))  
BD Agent

The CRM Access shows what level of access the user has to the CRM system and what type the user is.

### Last Login

1/15/08 11:24a

The Last Login shows last known login time. For detailed information on previous logins check the bottom of the page for Recent Logins.

[Recent Logins](#)

### + Add

The Add button allows an admin to add a new employee to the system. The screens are navigated the same as My Settings. See the My Settings area for detailed information.

## Edit Website

Under the settings and website tab there is a location to edit a VinSolutions supported website. The main area tab houses webpage fields, contact us information, parts, body shop, and service contacts.

The screenshot shows the 'Edit Website' interface with the 'Page Fields' tab selected. It contains three text input fields: 'Page Title' with a hint 'Enter the title for this page. The web browser will display the title in the title bar.', 'Keywords' with a hint 'Keywords help the search engines get your site into the search results. Enter keywords using commas to separate each word or phrase.', and 'Site Description' with a hint 'Enter a brief description of your site.'.

The Page Fields area is where the page title, key words, and site description can be confirmed and or changed.

## Contact Us

The screenshot shows the 'Contact Us' section with seven text input fields for different email addresses: 'General Email', 'Employment Application Email', 'Finance Application Email', 'Finance Application ADF Email', 'Quick Quote Email', 'Quick Quote ADF Email', 'Trade Request Email', and 'Trade Request ADF Email'.

The Contact Us area house the general contact emails for the dealership. All correspondence from the website can be filtered to different e-mail addresses.

## Parts Contact

The screenshot shows the 'Parts Contact' section with three text input fields: 'Name', 'Phone', and 'Email'.

## Service Contact

The screenshot shows the 'Service Contact' section with three text input fields: 'Name', 'Phone', and 'Email'.

## Body Shop Contact

The screenshot shows the 'Body Shop Contact' section with three text input fields: 'Name', 'Phone', and 'Email'.

The Parts, Service, and Body Shop Contacts can be set to receive related inquiries from the dealer's VinSolutions supported website.

## Inventory

The Inventory section houses all the settings affiliated with the display of the dealership inventory on the website.

## Inventory Settings

The screenshot shows the 'Inventory Settings' section. It includes a 'Default sort' dropdown menu set to 'Make, Year, Model' with a hint 'Default sort when the page loads.' Below it is a 'Page size' dropdown set to '20' with a hint 'Number of vehicles to be listed on the Inventory Gallery page. Additional inventory will be listed on subsequent pages. ie. Page 1 of 3'. There are several checkboxes: 'Do not require phone number' (unchecked, hint: 'Phone number will not be required on vehicle leads.'), 'Require Zip Code' (unchecked, hint: 'Zip Code will be required on vehicle leads.'), 'Hide new cars' (unchecked, hint: 'Hides new cars on the Inventory Gallery. The "New" link is removed.'), 'Hide history reports' (unchecked, hint: 'No history report will be shown on this website. If the dealer uses CarFax or AutoCheck is not set here.'), 'No price message' (set to 'Call for Pricing', hint: 'Message displayed when no price is available for the vehicle. Ex. "Call for Details" or "Call for Pricing"'), 'Vehicle comment within search' (unchecked, hint: 'Displays the Sales Pitch/Tagline/Comment entered for each vehicle on the Inventory Gallery search page next to each vehicle.'), 'Custom tagline within search' (with a text input field and a hint: 'The text entered here is shown next to every single vehicle on the Inventory Gallery search screen. HTML may be entered here.'), and 'Hide payment calculator' (unchecked, hint: 'Will hide the payment calculator link on the inventory display').

The Inventory Settings starts with the default sort of the vehicles when they are listed on the site.

The screenshot shows the 'Default sort' dropdown menu open, displaying a list of options: 'Make, Year, Model' (selected), 'Year, Make, Model', 'Price', 'Mileage', 'Certified', and 'Stock Number'.

Page size:

Do not require phone number: ☐

Require Zip Code: ☐

Hide new cars: ☐

Page Size designates how many vehicles can be displayed on one page.

Next decide what is required for a lead to be submitted.

Do not require ☐ phone number: *Phone number will not be required on vehicle leads.*

Require Zip Code: ☐ *Zip Code will be required on vehicle leads.*

Hide new cars: ☐ *Hides new cars on the Inventory Gallery. The "New" link is removed.*

Check boxes are available to hide newly listed vehicles, car fax information, and vehicle comments. Set the message if there is no price listed and set any custom tagline. The option is available to hide the payment calculator.

Hide history reports: ☐ *No history report will be shown on this website. If the dealer uses CarFax or AutoCheck is not set here.*

No price message:  *Message displayed when no price is available for the vehicle. Ex. "Call for Details" or "Call for Pricing"*

Vehicle comment within search: ☐ *Displays the Sales Pitch/Tagline/Comment entered for each vehicle on the Inventory Gallery search page next to each vehicle.*

Custom tagline within search:

*The text entered here is shown next to every single vehicle on the Inventory Gallery search screen. HTML may be entered here.*

Hide payment calculator: ☐ *Will hide the payment calculator link on the inventory display*

**Pre-Owned Vehicle Pricing Options**

Primary field:

Primary label:

*The price field may be changed from the Internet Price to another field. This price is considered your price and should be lower than an optional secondary price. A label like "Our Price", "Internet Price", "Bob's Special", or etc can be used as a pricing label.*

Secondary field:

Secondary label:

*A secondary price field may be selected to show as a comparison price. The secondary price must be higher than the primary price. A label like "KBB Price", "Lot Price", or etc can be used as a pricing label.*

The Pre-Owned Vehicle Pricing Options allows a user to set the primary field for main price and a secondary field for a secondary price for the used vehicles.

**New Vehicle Pricing Options**

Primary field:

Primary label:

*The price field may be changed from the Internet Price to another field. The most common use is to set the secondary price as MSRP, and leave the primary price as the Internet Price to show a savings. A label like "Our Price", "Internet Price", "Bob's Special", or etc can be used as a pricing label.*

Secondary field:

Secondary label:

*A secondary price field may be selected to show as a comparison price. The secondary price should be higher than the primary price. A label like "MSRP Price", "Retail", "Lot Price", or etc can be used as a pricing label.*


Finance Link:

*Enter the link to your finance page.*

The New Vehicle Pricing Options allows a user to set the set the primary and secondary pricing fields for new vehicles. The finance link will link the customer to the existing finance page.

Main Inventory Custom Content

The Custom Content tab allows the user to set the content for each page the customer navigates to.

 Make sure to click the save button any time it appears.

CRM Inventory Reports Settings Admin

Dealer Settings My Settings User List Websites Dealer Hours ILM/CRM Settings Billing

Edit Website Manage Websites Finance Apps

**Pre-Defined System Content**

Name	Title
<a href="#">edit</a>	About Us - page content
<a href="#">edit</a>	Bodyshop Schedule Appointment - header content
<a href="#">edit</a>	Contact Us - header content
<a href="#">edit</a>	Employment - custom content
<a href="#">edit</a>	Finance App - first step header content
<a href="#">edit</a>	Home page - custom content
<a href="#">edit</a>	Inventory Gallery - Certified header content
<a href="#">edit</a>	Inventory Gallery - Disclaimer
<a href="#">edit</a>	Inventory Gallery - eBay header content
<a href="#">edit</a>	Inventory Gallery - Extra Seller Information
<a href="#">edit</a>	Inventory Gallery - Internet Specials header content
<a href="#">edit</a>	Inventory Gallery - New header content
<a href="#">edit</a>	Inventory Gallery - Pre-owned header content
<a href="#">edit</a>	Inventory Gallery - Vehicle Details New Page Extras
<a href="#">edit</a>	Inventory Gallery - Vehicle Details Pre-Owned Page Extras
<a href="#">edit</a>	Location & Hours - header content
<a href="#">edit</a>	Parts Order - header content
<a href="#">edit</a>	Quick Quote - header content
<a href="#">edit</a>	Service Schedule Appointment - header content
<a href="#">edit</a>	Trade-In - header content

Finance Applications submitted through a VinSolutions supported website can be found under the settings tab and then under the websites sub-tab.

**Website Finance Applications**

**Applicant Search**

Name:  Search

From: 5/12/2008 To: 5/19/2008

**Applicant Name**

No records to display.

	S	M	T	W	T	F	S
18	27	28	29	30	1	2	3
19	4	5	6	7	8	9	10
20	11	12	13	14	15	16	17
21	18	19	20	21	22	23	24
22	25	26	27	28	29	30	31
23	1	2	3	4	5	6	7

The Finance Applications can be sorted by the name or date submitted.

**Dealer Hours**

	Open	From	To
Monday	<input checked="" type="checkbox"/>	10:00 AM	10:00 PM
Tuesday	<input checked="" type="checkbox"/>	10:00 AM	9:00 PM
Wednesday	<input checked="" type="checkbox"/>	10:00 AM	10:00 PM
Thursday	<input checked="" type="checkbox"/>	10:00 AM	10:00 PM
Friday	<input checked="" type="checkbox"/>	10:00 AM	10:00 PM
Saturday	<input checked="" type="checkbox"/>	10:00 AM	10:00 PM
Sunday	<input type="checkbox"/>	10:00 AM	10:00 PM

**Service Department Hours**

	Open	From	To
Monday	<input checked="" type="checkbox"/>	9:00 AM	7:00 PM
Tuesday	<input checked="" type="checkbox"/>	9:00 AM	7:00 PM
Wednesday	<input checked="" type="checkbox"/>	9:00 AM	7:00 PM
Thursday	<input checked="" type="checkbox"/>	9:00 AM	7:00 PM
Friday	<input checked="" type="checkbox"/>	9:00 AM	7:00 PM
Saturday	<input checked="" type="checkbox"/>	8:00 AM	7:00 PM
Sunday	<input type="checkbox"/>	9:00 AM	7:00 PM

**Parts Department Hours**

	Open	From	To
Monday	<input checked="" type="checkbox"/>	10:00 AM	6:00 PM
Tuesday	<input checked="" type="checkbox"/>	10:00 AM	6:00 PM
Wednesday	<input checked="" type="checkbox"/>	10:00 AM	6:00 PM
Thursday	<input checked="" type="checkbox"/>	10:00 AM	6:00 PM
Friday	<input checked="" type="checkbox"/>	10:00 AM	6:00 PM
Saturday	<input checked="" type="checkbox"/>	10:00 AM	6:00 PM
Sunday	<input type="checkbox"/>	10:00 AM	6:00 PM

**Bodyshop Department Hours**

	Open	From	To
Monday	<input type="checkbox"/>	10:00 AM	7:00 PM
Tuesday	<input type="checkbox"/>	10:00 AM	7:00 PM
Wednesday	<input type="checkbox"/>	10:00 AM	7:00 PM
Thursday	<input type="checkbox"/>	10:00 AM	7:00 PM
Friday	<input type="checkbox"/>	10:00 AM	7:00 PM
Saturday	<input type="checkbox"/>	10:00 AM	7:00 PM
Sunday	<input type="checkbox"/>	10:00 AM	7:00 PM

Dealer Hours are found under the main Settings tab and under the Dealer Hours sub-tab. This is where the dealership hours are set. They will be displayed on the VinSolutions supported website. Internet response times are in part based off the showroom hours.



Make sure to save when finished modifying any information.

## ILM/CRM Settings

ILM/CRM Settings are the center of the MotoSnap software. Here dealers can control lead assignment, lead settings, customer assignments, lead sources, templates, email stationery, letter settings, sales processes, sales goals, service processes, desking settings, and over due tasks.

ILM/CRM Settings ▾ Billing ▾

**Lead Assignment**

- Lead Settings
- Customer Assignments by Rep
- Lead Source List
- Templates
- Email Stationary
- Letter Settings
- Sales Processes
- Sales Goals
- Service Processes
- Desking Settings
- Task Count List

## Lead Assignment Rules

[Add New Rule](#)

**Edit Rule: New Rule**

Groups: Manager  
 Users: Tom Stromboli  
 LeadSource: Click For a Call,Direct Mail,Email,Hand Raiser-Web  
 VehicleType: New      Make: Acura  
 Only Within Hours: Yes      Model: Any  
 Assign to who works next: Yes

**Edit Rule: Holly's Rule of 29 Down**

Groups: Any  
 Users: Any  
 LeadSource: 29Down99AMonth.com  
 VehicleType: All      Make: Any  
 Only Within Hours: No      Model: Any  
 Assign to who works next: No

The Lead Assignment Rules are used to filter who gets which internet leads. These rules are set and sorted by the use of cascade style filters. Meaning that the leads enter the filter system at the top of the list and are passed down through the list until a match is found.

When creating a new rule the leads can be filtered by the lead source,

**General**

Lead Assignment Rule Name: New Rule

☒ Assign only if sales rep is within working hours.  
☒ Assign to the sales rep that works next first.

**Lead Source**

--All Lead Sources--  
 29Down99AMonth.com  
 AutoBytel  
 AutoMart  
 AutoTrader  
 Autoweb  
 Best Used Meed  
 Cars.com  
 Click For a Call  
 Dealers WebSite

**Vehicle Type / Make / Model**

ALL  
 New  
 PreOwned Not Certified  
 PreOwned Certified

--All Makes--  
 Acura  
 Alfa Romeo  
 All General  
 Aston Martin  
 Audi  
 Bentley  
 BMW

--All Models--

the vehicle type, and or the user / group. Check boxes allow the dealer to control who receives leads based upon working hours.

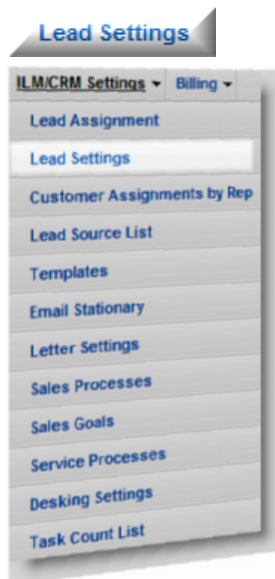
All ADF XML leads should be sent to the email address below. **Do not send non ADF XML messages to this address!** For example, don't send OEM alerts, eBay emails, website traffic reports or any other emails to this address!

So what happens if a non ADF XML email goes to this email address? We can attempt to forward it to a different email, or it will just sit in a inbox on the mail server. Non ADF XML messages are forwarded every couple hours.

Leads Address: [leads@test.vinleads.com](mailto:leads@test.vinleads.com) ([view inbox](#))  
Forward non ADF emails to: [stamasii@test.vinleads.com](mailto:stamasii@test.vinleads.com)

The leads that come in to MotoSnap must be in ADF/XML format. In the even that the leads are not formatted correctly they maybe directed to an alternate e-mail. That e-mail address is set at the bottom of the lead assignment page.

When finished modifying information in the leads assignment area click save. Be advised that any changes to this area of the system are immediate and can monumentally affect the quality of the customer's experience with the internet department. These rules should be well thought out prior to any implementations and changes otherwise lead information can be lost or misplaced.



The Lead Settings screens are designed to give the user control over a myriad of tools from the response time goals to the return on investment settings.

#### Response Time Goals

Used in response time reports to measure how well the dealership is doing versus their goals. We recommend that Goal #1 be 1-4 hours and Goal #2 be 24 hours.

Goal #1:  (hours)  
ex. .25, .5, 1, 4, etc.  
Goal #2:  (hours)

The Response Time Goals control the internet response time pie that is shown on the dashboard. These are the times that the salesmen will try to meet. When setting the response times the smaller number must always be goal number one and the larger number must be goal number two.

#### Unresponded Lead Manager Alert

An email will be sent to someone if the internet salesperson doesn't respond within the duration set.

Enabled: ☒  
Duration Minutes:   
Send Alert To: [Tom Stromboli](#)

The Un-Responded Lead Manager Alert is designed to send a manager an alert if an internet lead is left unattended for the time set in the "Duration Minutes" area. When this is enabled managers can keep an eye on the internet department with out having to login and view the response times.

#### Auto-Complete Showroom Visits

Allows the system to auto complete showroom visits. It will also auto-start the unsold follow up process!

Enabled: ☒  
Auto-close after:  hours

The Auto-Complete Showroom Visits section when enabled is designed to end visits from the showroom floor after a predefined amount of time. Be advised that all auto completed showroom visits will be marked as "Unsold." That is to say that the customers will immediately begin to receive unsold showroom visit follow up. This only becomes a problem if the customer whose visit has been automatically ended did in fact buy a vehicle.

#### Auto-Cancel Appointments

Allows the system to auto-cancel meeting appointments that are not completed by users.

Enabled: ☒  
Auto-cancel after:  hours

Auto-Cancel Appointments section when enabled will mark an appointment not completed after a set amount of time.

## Lead Settings

### Auto-Mark Lead Lost

Automatically marks leads lost after a set time period.

Mark Lost after: 90 Year(s)

The next section is Auto-Mark Leads Lost. This section is designed to mark a lead lost after an allotted time frame. Be advised that the leads will be changed from active status to a lost status and therefore will receive the lost customer follow-up.

### After Hours Process Settings

Changing this to "Use Dealer Hours" will make the "Off Hours" Sales Process trigger immediately when the lead comes in and it is currently outside dealer hours. The new Internet lead Sales Process will also trigger, but will not start the process until the dealership opens the next day.

Setting: Use Dealer Hours

The After Hours Process Settings is optional follow-up for internet leads submitted after the dealership is closed.

### Duplicate Customer Notification (Skate Alert)

When enabled, alert task(s) are created if a duplicate customer is found in the system whenever a customer is edited and saved. This setting determines who receives those alerts.

Both

The Duplicate Customer Notification (Skate Alert) is to alert the manager or salesman or both of possible duplicate customer information.

### Rule-based Lead Assignment

Enabling this will enable the new rule based Lead assignment.

Enabled: ☒

Rule-Based Lead Assignment is enabled to allow for custom lead rules to be set from the lead assignment tab.

### Overdue Tasks

Days: 4

This is the number of days before a task is considered overdue.

Block Add: ☐

When enabled, if a user has overdue tasks the system will prevent them from adding new customers.

Overdue Tasks area sets the number of days before an assigned task is considered overdue. The Block Add area when enabled will prohibit a salesman from adding a new customer to the system when they have overdue tasks.

### Price Change Customer Template

When enabled, the customers will get an email when the price of their selected vehicle changes.

Enabled: ☒

Select template: Certified

Select Stationary: -- Default -- Preview

Subject: Certified

Certified

Hello [CUSTOMER FULL NAME],

Saw you were looking at [VEHICLE YMM]. Here are some others you might like.

[SIMILAR VEHICLES]

Thanks Dude!

[\[DEALER WEBSITE\]](#)

Price Change Customer Template is used to alert the customers when the price is changed on a vehicle that they are interested in. By enabling this feature the customer automatically receives an email when inventory prices are changed.

### Vehicle Inventory Links

Allow setting where URLs point to that are in emails sent to customers. For example the link could go to photos, your website, or some special place. With "Automatic" selected, the system will use a VinSolutions Website URL if you have a website or Inventory Gallery with us, otherwise it will use our standard photo display.

Type: ☒ Automatic (Default)

☐ Photo Display

☐ VinSolutions Provided Website

☐ Custom

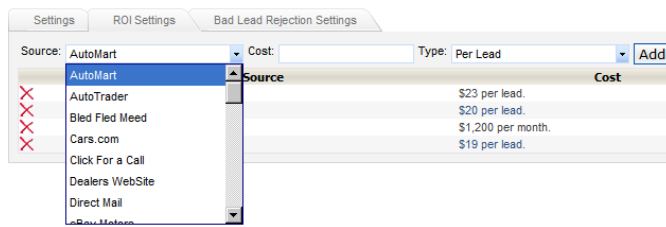
The Vehicle Inventory Links are available to those dealers using a VinSolutions supported webpage and allow the dealer to direct the links on the webpage.





The ROI Setting controls the ROI report. The settings are found under the settings tab and in the ILM/CRM sub-tab under lead settings. To add a provider select one from the source drop down list then enter cost, type and then click add. To delete a provider click the red X on the left hand side next to the provided. Make sure to save once modifications are complete.

The ROI Setting controls the ROI report. The settings are found under the settings tab and in the ILM/CRM sub-tab under lead settings. To add a provider select one from the source drop down list then enter cost, type and then click add. To delete a provider click the red X on the left hand side next to the provided. Make sure to save once modifications are complete.



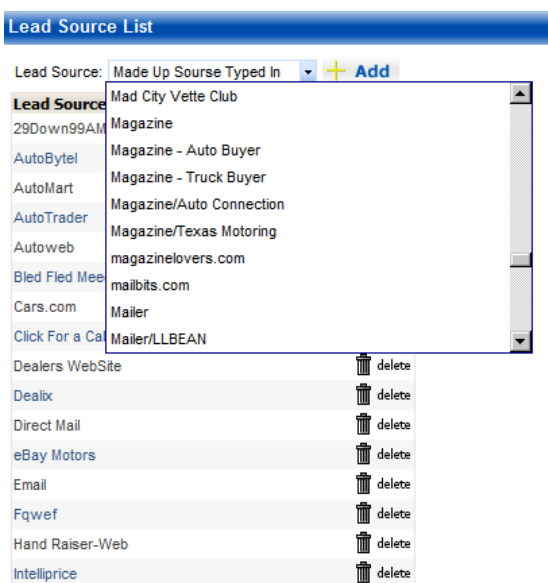
Bad Lead Rejection Settings are used to calculate the amount of money saved by the company for each time a lead is marked bad. Once the lead representative's e-mail address and name are added to the system the related bad leads will start returning to that representative. This enables the dealership to ask for refunds easily at the end of the month.

### Customer Assignments by Rep

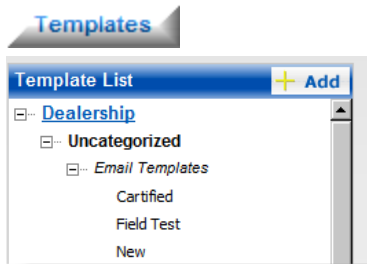
Unassigned Customers		
Status	Name	Customers
Active	Alex Moore	12
Active	BD Agent	79
Active	C Dub	2
Active	Charles Thornton	91
Active	Chris Moore	12
Active	Cliff Murphy	75
Active	Dave Watson	89
Active	Heartland Chevrolet	89
Active	James DiChara	7
Active	Josh Baker	82
Active	Kayla Simmons	82
Active	Kellen Bowman	82
Active	Larry Kraus	7
Active	Michael Connelly	2
Active	Mike Connelly	99
Active	Mike Driver	1
Active	Nancy Lowe	76
Active	Ryan Sales	83
Active	test test	7
Active	Tom Stromboli	6
Active	Vin Sales	7
-	Steve Tamasi	343
-	Unassigned	0

The Customer Assignments by Rep section is found under the Settings tab and ILM/CRM Settings sub-tab. The purpose of this area is to allow the administrator to reassign any customers from salesmen or orphan sales to other users.

### Lead Source List



Lead Source List is where dealers chose what is displayed as a source upon adding a customer. Any custom sourcing or special marketing options can be added to the system by typing them in the lead source bar. To insure that a source appears at the top of the list when adding a customer place an asterisk in front of the name.



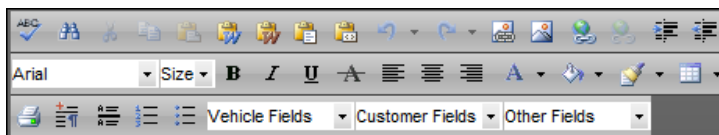
Templates can be viewed by everyone but can only be created and edited only by administrated.

Make sure those making modifications to this area are fully trained. Any mistakes in this area can have huge ramifications on customer communications and have an affect on the likely hood of the customer purchasing a new vehicle.



Templates are linked to the sales process and if any template in the sales process is deleted it can cancel or suppress certain processes from firing. Be advised that just because a template is modified it does not mean that the process has been modified. Any changes or additions should be well planned prior to adding or editing a template. To pull up a template simply click on the name of the template in interest. For modification click the edit button. Be aware that the edit button is right next to the delete button, exhibit caution. Once edit has been clicked the process is fairly similar for both adding and up dating.

The template must have a name, type, and subject (if it is an e-mail). Categories are optional but make the template easy to find in the list. Check boxes allow the user to control the viewing of auto fill fields and if other users in the system can use the template.



The icons shown here allow the creator to customize the template by adding photos, hyper links, and spell check, to name a few. The vehicle fields, customer fields, and other fields will allow for customization of the template. These will pull the desired information from with in MotoSnap and apply it to the template each time it is used. Meaning that it will auto fill the customer's name, dealership name, and salesmen's signature along with any other fields found in the drop down. Be advised, fields must be selected from the drop down list. There is no making up fields and expecting the software to know what to fill in. Make sure to save before moving on.



Edit	Title	Default	Status
	Nancy's Test		
	First Stationary - Imported		

The Stationery List houses all the different E-mail Stationeries available to the dealer. To edit them click on the pencil icon.



## Letter Settings

### Letter Settings

#### Letter Printing Margin

Margin values are in inches

Left	0.75
Right	0.75
Top	2.00
Bottom	0.35

The Letter Settings control the margins for the letters that queue to print from the sales process. The margins are measured in inches.

## Sales Processes

### Process List

#### ILM - New Internet Lead (21)

When a new lead is recieved

#### CRM - Showroom Visit Follow Up (6)

When showroom lead is not sold this process will begin

#### ILM - Internet After Hours (0)

Process for leads that come in after hours.

Dealer must enable this setting in Lead Settings

The Sales Processes are by far the most customizable feature of the VinSolutions software service and easily the most confusing. For this reason free training is available please contact VinSolutions for information on this free training. Make sure that all changes and modifications are well planed and executed before taking them live to the customers.

#### ILM - New Internet Lead (21)

When a new lead is recieved

+ Add Custom Rule

Autobytel	▼	🗑
Intallasweep	⬆ ⬇	🗑
Dealix	⬆	🗑

#### Standard Process

+ Add Event

📞	Create Task Phone will run Immediately
	Call customer to thank them for submitting a lead
✉	Create Task Email will run Immediately
	Reply to customer's new lead
📱	Alert Notification will run Immediately
✉	Send Email will run Immediately
	New
✉	Send Email will run Immediately
	Used

The first process on the list is for a New Internet Lead. When expanded this area reviles all rules and processes in the category. Add Custom Rule appears above the existing rules. When creating a custom rule the filters can be set based on vehicle, lead source, or user/group. Be advised, the rule must be enabled before it is effective and starts being used. For best results, wait until all the tasks are built with in that rule before enabling it.

<b>General</b>	
Process Rule Name: (Default Rule Name)	
Enabled: <input type="checkbox"/>	
<b>Vehicle Type</b>	
ALL New PreOwned Not Certified PreOwned Certified	
<b>Make / Model</b>	
...All Makes... Acura Alfa Romeo Audi Aston Martin Audi Bentley BMW Bugatti Buick Cadillac Chevrolet	...All Models...
<b>Lead Source</b>	
...All Lead Sources... 28Down99Allmonth.com Autobytel AutoMart AutoTrader Autosweb Bled Fleed Meed Cars.com Click For a Call Dealers WebSite	
<b>User Groups / Users</b>	
...All User Groups... Special Finance Internet	...All Users... Dave Watson Davy Jones Watson

## Sales Processes

### + Add Event

To add an event to the sale process, first determine where in the buy experience the event should take place. Then click the add event button. Chose from the drop down list what activity is to fire. Determine from whom the task is coming or if it is a manual task, such as making a phone call who should be the one to make the call.

Select user: **Current Sales Rep**  
 Select template: **Current Sales Rep**  
 Service Agent  
 BD Agent  
 CSI Agent  
 Manager

Event type: **-- Select Event Type --**  
 -- Select Event Type --  
 Create Phone Task  
 Send Automated Email  
 Create Email Task  
 Mail Letter to Customer  
 Alert Notification  
 Change Sales Rep  
 Change Status to Lost  
 Change Status to Bad  
 Clear All Tasks

If applicable, templates are available and can be attached to a particular task. Then chose a time frame. Task can be delayed if necessary. Lastly select the vehicle types affected by the task and type a description for the user to understand what the task is. Then click save.

**Edit Process Event**

Event type: **Create Phone Task**  
 Select user: **Current Sales Rep**  
 Select template: **Cody's Email Call Script**  
 Just wanted to call and see if you have all the info you need on the [VEHICLE MAKE]

**When do you want this action to happen?**  
☒ Immediately ☐ Select custom time frame

Vehicle Type: **ALL**  
 New  
 PreOwned Not Certified  
 PreOwned Certified

Event Description: **3 Day Unsold Call to Customer. Ask them to come back in.**

Repeat these steps until all tasks are in place. Then enable the rule to fire and it will be live to all customers that are affected by the filters set in the new rule.

## Process List

**ILM - New Internet Lead (21)**  
 When a new lead is recieved

The ILM New Internet Lead fires for any new lead that is electronically submitted to the system. This process stops firing once contact has been made with the customer. Appointments are the only source of follow up after that.

**CRM - Showroom Visit Follow Up (6)**  
 When showroom lead is not sold this process will begin

The CRM Showroom Visit Follow Up is for any one who came on to the showroom floor but did not purchase a vehicle and will continue to fire until an appointment is set.

**ILM - Internet After Hours (0)**  
 Process for leads that come in after hours.  
 Dealer must enable this setting in Lead Settings

The ILM Internet After Hours process only works when enabled in the lead settings area. This process applies to the internet leads that come in after hours and works much like the New Internet Lead section.

**Lead - Email Response Received (1)**  
 When a email response from the customer is received

The Email Response Received process fires after a customer sends an e-mail in to the dealership.

## Process List

### Lead - Marked Lost (2)

When a lead is marked as being a lost

The Marked Lost process fires any time a lead status is changed to lost.

### Lead - Marked Bad (1)

When a lead is marked as being a bad

The Marked Bad process begins to fire when a lead status is changed to Bad.

### Lead - Sales Rep Changed (2)

When the sales rep for the lead has changed

The Sales Rep Changed process fires any time the ownership of the customer is changed.

### Sold - Delivered (3)

When the lead is sold and delivered

The Sold Delivered process fires for any customers whose status is sold delivered.

### Sold - Pending (0)

When a lead gets set to sold pending status

The Sold Pending process is for customers whose status is sold pending.

### CRM - Customer Birthday (2)

Events can be setup for up to 9 months before or up to 3 months after a customers birthday. Any event out side of this range will not fire.

Customer Birthday process fires before or the day of a customer's birthday.

### Appointment Reschedule (0)

When a appointment is marked completed

The Appointment Reschedule processes fire for the customers whose appointments have been moved.

### Appointment Reminder (3)

This event is different because it is based on when the appointment date is set to occur and not when the event was fired

The Appointment Reminder process will fire before the date and time of a customer's appointment.

### ILM - New Service Lead (0)

When a new service lead is received

The New Service Lead is a process for internet submitted service leads.

### ILM - New Parts Order Lead (0)

When a new parts order is received

The New Parts Order Lead applies to only to internet submitted parts order leads.

## Sales Goals

### Sales Staff Goals

#### Dealership Summary

	Showroom	Phone	Internet	BeBack	Sold
<b>Last Month</b>					
April 2008	14 / 7 %	6 / 0 %	7 / 0 %	0 / 0 %	1

Values are in the format: #leads / % sold  
Figures exclude leads of type: Import

Use Last Month's Average

Recalculate

Sales goal allow salesmen to have a visual on what it takes to sell a certain number of vehicles in a month. Set the goals by clicking the "Use Last Month's Average" and the system will figure everyone's goals based off what they did last month. To make it more challenging adding to the number of ups or the closing percentage. Make sure to save when finished modifying the information.

## Desking Settings

### Desking Settings

Taxes

Defaults

Printing

#### Standard Loan Taxes

#### Lease Taxes

Tax Calculation Mode: Tax Trade Difference Tax Calculation Mode: Tax the Payment

Tax 1 Default: 4.000000 %

Tax 1 Default: 4.000000 %

Tax 2 Default: 1.500000 %

Tax 2 Default: 1.500000 %

Tax 3 Default: 0.500000 %

Tax 3 Default: 0.500000 %

Tax Processing/Doc Fee: ☐

Tax Licensing Fee: ☐

Tax Service Contract: ☐

Tax Gap Insurance: ☐

Tax Rebate: ☒

Tax Lease Acquisition Fee: ☐

Tax Cap Cost Reduction: ☒

The Desking Settings are found under the Settings tab and the ILM/CRM Settings sub-tab. The taxes area allow the dealer to determine how the deals are taxed.

Term		APR	Term		APR	Term			Residual	Factor
Option 1:	36	5.000 %	Option 1:	24	7.000 %	Option 1:	36	54.000 %	0.00000	
Option 2:	48	6.000 %	Option 2:	36	8.000 %	Option 2:	48	52.000 %	0.00000	
Option 3:	60	7.000 %	Option 3:	48	9.000 %	Option 3:	60	50.000 %	0.00000	

Default New Car Loan Terms		Default Pre-Owned Car Loan Terms		Default Lease Options	
<input checked="" type="radio"/> Entered Value <input type="radio"/> Percentage of Selling Price		Processing/Doc Fee Default: 250 Tag Fee Default: 0 Loan Payment Range: 20		Lease Default Bank Fee: 0 Lease Default Security Deposit: 399 Lease Payment Range: 0	
Down Payment Default 1: Down Payment Default 2: Down Payment Default 3:					

The Defaults area allows the dealer to set the term, APR, tag fee, and down payments.

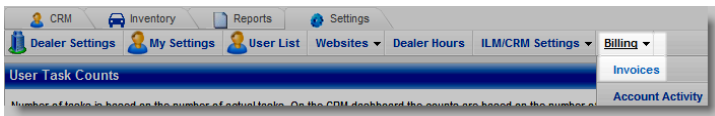
Taxes	Defaults	Printing
Print APR:	<input checked="" type="checkbox"/>	
Print Residual:	<input type="checkbox"/>	
Print Accessories:	<input checked="" type="checkbox"/>	
Print Gap:	<input checked="" type="checkbox"/>	
Print Deal Details Section:	<input checked="" type="checkbox"/>	
Print Payment Spread:	<input checked="" type="checkbox"/>	
Disclaimer Text		
For Well Qualified Buyers		

The printing section allows dealers to control what information is printed and given to the customer.

## User Task Counts


Task Type:	Salesperson		
Sales Rep	Salesperson	Not Overdue	Overdue
Kellen Brown	Manager	0	1
Larry Kraus	BD Agent	0	2
Dave Watson	CSI Agent	0	4
Mike Connelly	Service Agent	0	3
Cliff Murphy		0	1
Kayla Simmons		0	1
BD Agent		0	3
C Dub		0	1
James DiChiara		0	1
Chris Moore		0	5
Ryan Sales		0	7
Nancy Lowe		0	3
Heartland Chevrolet		0	1
Josh Baker		0	3
Alex Moore		0	18



The User Task Counts are set up to show who in the dealership has overdue tasks and mass delete these overdue task. This feature is not to be used willy-nilly. In best practice administrators do not tell users that they have this ability. Many users begin to use it as a crutch.



The Billing tab is found under the Settings main tab. It houses the invoices and account activity.



## Invoices

Click "Pay Online" to pay via credit card or direct bank debit. If you would like to mail us a payment, please click on the  icon to view and print the invoice. Then mail your payment with a copy of the invoice to our address listed on the invoice.

Invoice #	Amount	Created	Due	Date Due	Payment
 26008	\$105.00	5/16/2008	5/31/2008		<a href="#">Pay Online</a>
 12	\$100.00	5/12/2004	5/17/2004		5/20/2004

The Invoices are viewable and printable. They can also be easily paid on line for the convenience of the dealer.

## Activity Report

Begin Date: 03/01/2008  End Date: 5/31/2008 

Group Transactions: ☒

[View Report](#) [Export to Excel](#)

Used/New	Stock #	VIN
No records to display.		

The Account Activity displays a list of all additional brochures purchase by the dealership.