

MANAGER WORK BOOK

TM



INFORMATION COVERED

- DEALER DASHBOARD
- DESKING
- INVENTORY MODULE
- REPORTS

This is the complete sales overview. The Dealer Dashboard shows the internet department, showroom activities, and sales force activities.



FIGURE 1.1



[Click here to choose timeframe and default dashboard.](#)



Analyse the internet sales process at a glance with this dynamic set of charts.

SECTION 2. DAILY ACTIVITY PAGE

When you click on the right side, the results are shown on the left, so information is easy to review without jumping back and forth. Incoming mail shown below as an example.

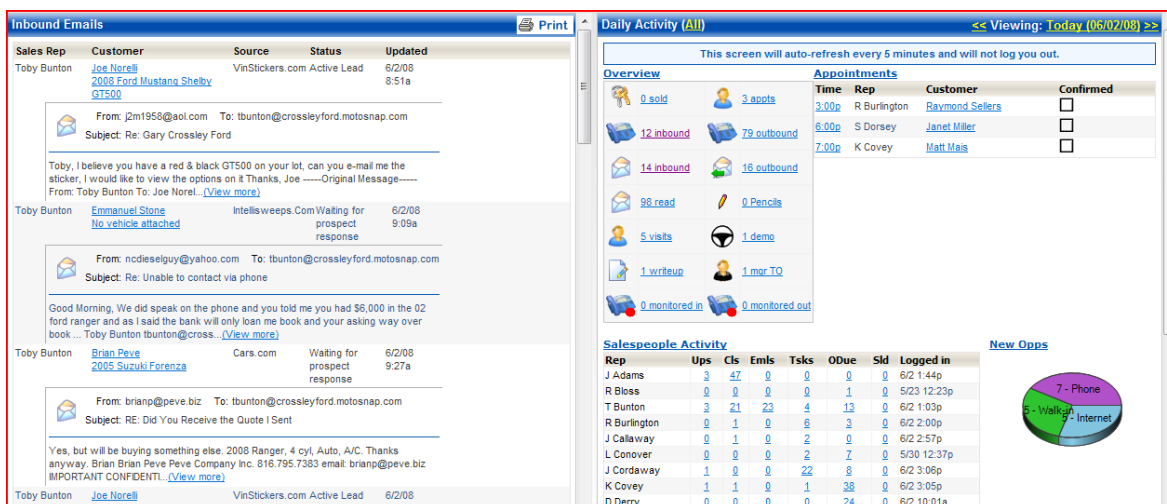
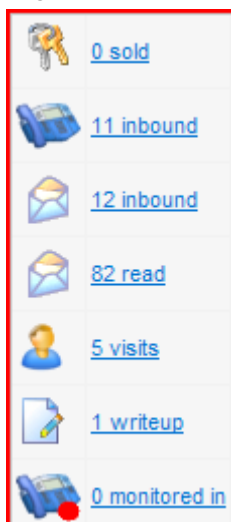


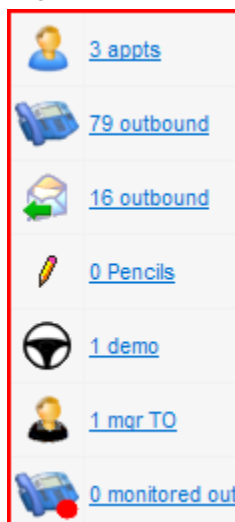
FIGURE 2

FIG 2.1



View Sold.
Incoming calls.
Emails sent in.
read by clients
Total floor traffic.
Deals sent to F&I.
Recorded in calls.

FIG 2.2



View today's appointments.
Outgoing calls by staff.
Emails sent out by your staff.
Proposals not TO'd to F&I
of test drives by clients
Visits TO'd to Manager.
Recorded outgoing calls.

FIG 2.3



This click thru pie chart keeps you aware of:

1. How many new opportunities today?
2. What brought them in today?

Click on chart to view leads on the left.

APPOINTMENTS LOG

FIGURE 2.4

Appointments			
Time	Rep	Customer	Confirmed
11:01a	J Taylor	Leroy Theas	<input type="checkbox"/>
12:00p	D Alvarez	Shelby Ross	<input type="checkbox"/>
1:00p	H Whitetree	Arnulfo Garcia	<input type="checkbox"/>
3:00p	H Whitetree	Mark	<input type="checkbox"/>
5:00p	J Dotts	James Miller	<input type="checkbox"/>
6:00p	D Alvarez	Mike / Santa Lymer / Claus	<input type="checkbox"/>
6:30p	D Alvarez	Kathy Tatum	<input type="checkbox"/>

How many appointments do we have today?
How many confirmed?

CUSTOMIZE DATE RANGES AND DEFAULT VIEWS.

FIGURE 2.5



By clicking on links from the dealer dashboard or Daily Activity Screen, you can access the configuration page.

FIGURE 2.6

On this menu, you can select the default time spans to monitor, default teams, and preferred dashboard view on left side of screen.

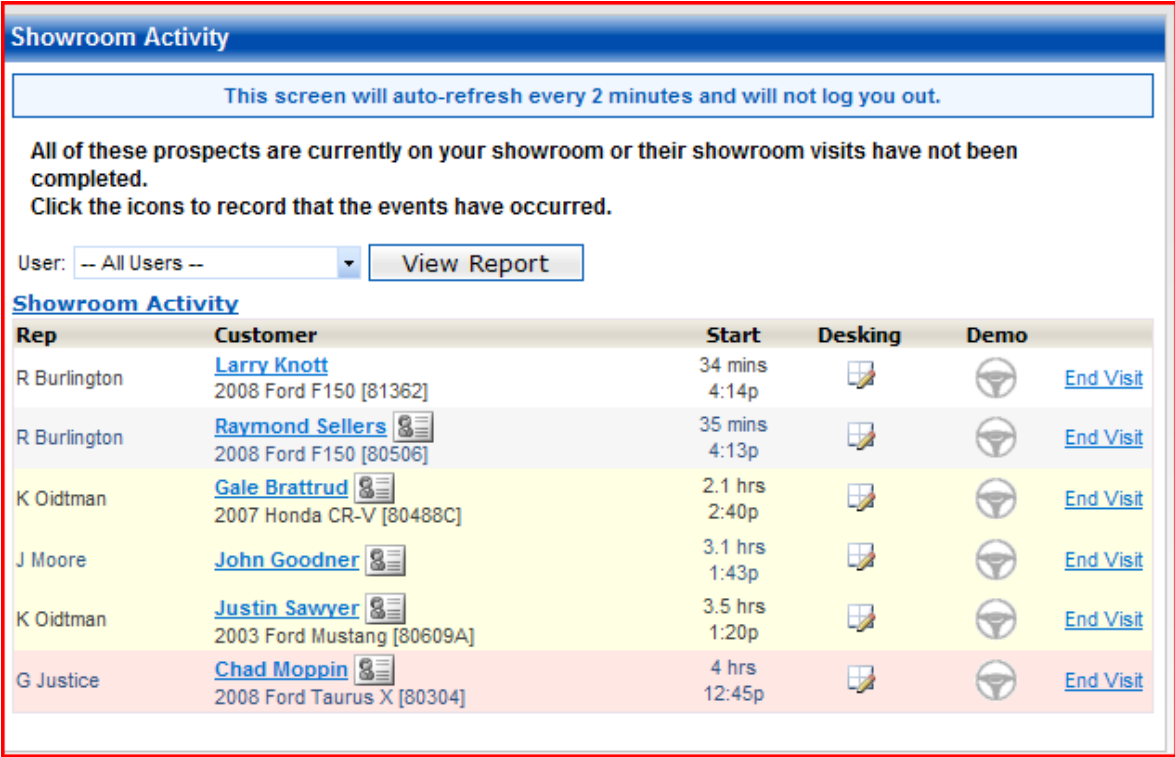
FIGURE 2.7

Additionally, you can access different days for the right side of the screen by selecting the arrows or date.

SECTION 3. THE SHOWROOM ACTIVITY

This is a real time view of customers on the showroom floor.

FIGURE 3



The shading behind the customer record indicates how long the visit has been active: White < 1 hour. Yellow is 1-4 hours. Red is >4 hours. Click on DL to view scanned image if your dealership is set up for one.

FIG. 3.1

Rep

J Baker

Salesperson indicator

FIG 3.2

Customer

[Audrey Hepburn](#)
2008 Ford Escape [80095]

Click on customer to open the Customer Dashboard. Make sure there's a vehicle associated with every customer.

FIG 3.3

Start

35 mins
3:03p

Note – Start time begins when the visit is created. That's not necessarily when the customer arrived!

FIG 3.4

Desking

Click here to create a worksheet for this client.

FIG 3.5

Demo

Click to indicate whether or not client took a demo drive.

FIG 3.6

[End Visit](#)

IMPORTANT!
When customer has left, the manager needs to indicate what happened.

ENDING A VISIT


FIGURE 3.7

Complete Visit


Delete Visit

Sales Rep: Alex Moore

Lead Type: Walk-in



Did you enter all of their personal information?
Prospect: [John Wayne](#)
[114 Hampshire Road](#)
[Toms River, NJ 08757](#)



Is this the correct vehicle they are interested in?
Vehicle: [2007 Pontiac G5 \[558645\]](#)
Trade: [2006 Nissan Altima 2.5 S \(A4\)](#)

Did they do a walk around?

☒ Yes ☐ No

Did they demo a vehicle?

☒ Yes ☐ No

Did you writeup a deal?

☒ Yes ☐ No

Trade appraisal?

☐ Yes ☒ No

Manager turnover?

☒ Yes ☐ No

By:


Davy Jones Watson

Aftermarket Turnover?

☐ Yes ☒ No

Finance Turnover?

☐ Yes ☒ No



Did they buy a vehicle?

Yes

No

Visit Notes:

He is buying the car and taking it home tomorrow!

Delete Visit button cancels the visit as if it never happened.

If this section is not completed correctly, reports will not accurately reflect your work.

This question determines whether this client will receive sold or unsold follow up.

IMPORTANT!

All Sold and Unsold Follow-Up is based on this End Visit. If you don't end the visit, there is no follow-up.

SECTION 4. DEALER DESK LOG

This is a running log of ALL opportunities for selected time frame.

FIG 4

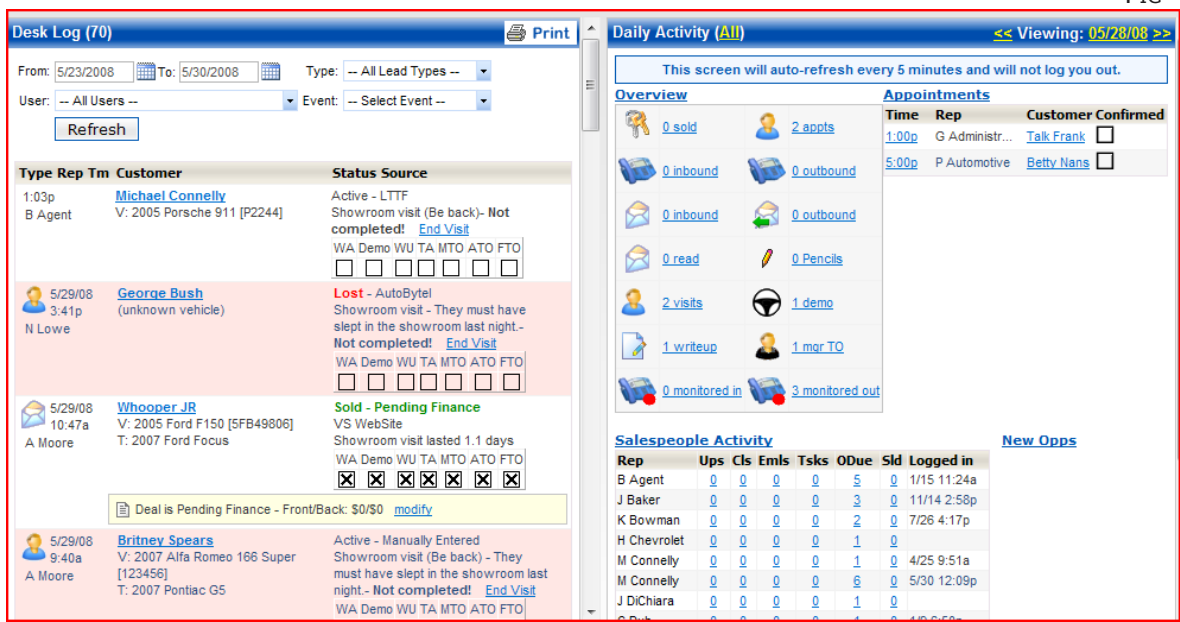


FIG 4.1

Type Rep Tm

3:03p
J Baker

Type Rep Tm

Customer

Audrey Hepburn

Kansas City, KS

D: (816) 547-4148

V: 2008 Ford Escape [80095]

T: 1993 Saab 9000

Type Rep Tm

Customer

Audrey Hepburn

Kansas City, KS

D: (816) 547-4148

V: 2008 Ford Escape [80095]

T: 1993 Saab 9000

FIG 4.2

Contracted deals will show this field on the desk log.

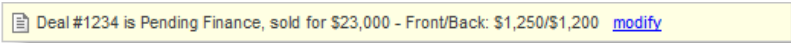


FIG 4.3

Traditional steps to the sale chart.

WA Demo WU TA MTO ATO FTO

WA

Demo

WU

TA

MTO

ATO

FTO

Traditional steps to the sale chart.

WA Demo WU TA MTO ATO FTO

WA

Demo

WU

TA

MTO

ATO

FTO

FIG 4.4

www.VinSolutions.com

SECTION 5. SOLD LOG

This log shows new and pre-owned contracted deals in all stages for selected time frame.

FIG 5

The screenshot shows the 'Sold Log (195)' interface. It includes a navigation bar with options like Dashboard, Recent, Tasks, Calendar, Email, Leads, Add, Search, Distribution, and More. The main area is divided into two panes. The left pane displays a table of deals with columns for Rep, Customer, Source, and Sold. The right pane shows a detailed view of a specific deal, including Buyer information (Buyer ID, First Name, Middle, Last Name, Address, City, State, Zip Code) and Vehicle information (Contract Type, Deal Number, Deal Status, Comments, Stock Number, VIN, Inventory Type, Vehicle Type, Year, Make, Model, Delivery Odometer, Sales Price, Hold Back).

Rep	Customer	Source	Sold
Eddie McCormick	Mark Hemm	AutoTrader	4/30/08
Greg Justice	Chelsea Koehn	Walk In	4/30/08
Don Derry	Lori Snow	Walk In	4/30/08
Kurt Oldman	Jerald Modaniel	Repeat Customer	4/30/08
Lisa Garcia	Beth Castelluccio	Referral	4/30/08
Jim Callaway	Kenneth West	Repeat Customer	4/30/08

Red shading indicates non delivered deals. Finalized deals will show gross. Use date ranges, and new used filters to dial in on the info you need.

Non delivered deals view creates the save a deal meeting.

The screenshot shows a dropdown menu for the 'Status' filter. The menu is open, showing options: All, Delivered, and Not Delivered. The 'All' option is currently selected.

FIG 5.1

Dial in on a salesperson's or team's production using the Rep drop down list.

The screenshot shows a dropdown menu for the 'Rep' filter. The menu is open, showing a list of salespeople: Alex Moore, BD Agent, C Dub, Chris Moore, Cliff Murphy, Dave Watson, Davy Jones Watson, Example Sales, and Heartland Chevrolet. The 'C Dub' option is currently selected.

FIG 5.2

SECTION 6. THE MESSAGE LOG

This log will be used to track all of a users activity in the database. This is how you monitor the activities of your staff.

TIP: You want to know what a salesperson's accomplished while he's sitting at his desk? Make sure salespeople aren't wasting time surfing the web.

This report can be filtered to a specific type of event, or a specific salesperson.

FIG 6.1

Message Log

Below is a log of recent activity in the dealership over the last 48 hours. This data will auto-refresh every 2 minutes.

Event Type: All

From: 5/15/2008

To: 5/16/2008

User: -- All Users --

Refresh

Time	Event Type	Prospect Name	Sales Rep	Lead Source
Today, 1:04p	Sold	Tom Craig		Manually Entered
Today, 12:48p	Outbound phone call	Ray Hall	Alex Moore	Newspaper
Today, 12:45p	Incoming phone call	Barry Bonds	Alex Moore	Newspaper
Today, 12:45p	Note	Barry Bonds	Alex Moore	Newspaper
Today, 12:43p	Showroom visit	Cardinal Richelieu	Alex Moore	Stasek Classic Car Show
Today, 12:35p	Showroom visit	Audrey Hepburn	Josh Baker	Repeat Customer
Today, 12:34p	Showroom visit	Barry Bonds	Alex Moore	Newspaper
Today, 12:31p	Incoming phone call	Britney Spears	Alex Moore	Manually Entered
Today, 12:30p	Incoming phone call	Ronald McDonald	Alex Moore	Newspaper
Today, 12:23p	Note	Tzu Sun Zi	Chris Moore	Direct Mail
Today, 12:20p	Showroom visit	Jacob Zuma	Mike Connelly	AutoMart
Today, 12:17p	Showroom visit	Tony Blaire	Mike Connelly	Autoweb
Today, 12:06p	Incoming phone call	Jacob Zuma	Mike Connelly	AutoMart
Today, 11:59a	Showroom visit	George Bush	Alex Moore	Newspaper
Today, 11:59a	Showroom visit	John Wayne	Alex Moore	Service Dept
Today, 11:45a	Email reply from customer	Jeffery The Great Wolfer The 2nd	Alex Moore	Manually Entered
Today, 11:41a	Sales rep emailed prospect	Jeffery The Great Wolfer The 2nd	Alex Moore	Manually Entered
Today, 11:39a	Outbound phone call	Jeffery The Great Wolfer The 2nd	Alex Moore	Manually Entered
5/15/08 2:08p	Sold	Carlos Henry	Heartland Chevrolet	Autoweb
5/15/08 10:06a	Email auto responder	Jacob Zuma	Mike Connelly	AutoMart
5/15/08 8:59a	Showroom visit	Carlos Henry	Heartland Chevrolet	Autoweb

Time	Event Type	Prospect Name	Sales Rep	Lead Source
Today, 3:03p	Showroom visit	Audrey Hepburn	Josh Baker	Repeat Customer

FIG 6.2

Event Type:	<div>All</div>
From:	<div>Lead Received (XML)</div>
User:	<div>Email Reply</div>
	<div>Incoming Phone Call</div>
	<div>Outbound Phone Call</div>
Time:	<div>Lost Lead</div>
Today, 3:03p	<div>Email Auto Responder</div>
Today, 3:03p	<div>Bad Lead</div>
Today, 2:08p	<div>Sold Note</div>
Today, 12:48p	<div>General Note</div>
Today, 12:45p	<div>Email reply from customer</div>
Today, 12:45p	<div>Email Failure</div>

FIG 6.3

SECTION 7. KIOSK MODE

The Kiosk Mode is designed for quick data entry. Salespeople can create a showroom visit without having to log in. Simply click on a name or a picture, then add a customer, and it is assigned to the selected salesperson.



FIG 7.1

VinSolutions recommends that at least one public access computer is located on the showroom floor that is always in kiosk mode, ideally with a drivers license scanner attached.

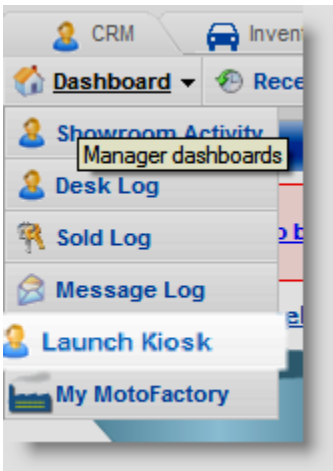


FIG 7.2

SECTION 8. DESKING TRAINING

The desking page is where deals are built. These worksheets are automatically associated with the customer record, ensuring an accurate transfer of deal structure between all managers.

Access the desking page from the showroom activity log, or the customer dashboard.

The screenshot shows a CRM interface with a top navigation bar (CRM, Inventory, Reports, Settings, Admin) and a search bar. Below the navigation bar is a 'Showroom Activity' section with a message: 'This screen will auto-refresh every 2 minutes and will not log you out. All of these prospects are currently on your showroom or their showroom visits have not been completed. Click the icons to record that the events have occurred.' A table lists prospects with columns for Rep, Customer, Start, Desking, and Demo. The table includes three rows of data for Manny Ramirez, Kenneth Merschbrock, and Henry The Eighth. To the right is a 'Customer Dashboard' for Manny Ramirez, showing contact information, current tasks (None), and vehicle information (2007 Ford Explorer Sport Trac Limited (New)).

Rep	Customer	Start	Desking	Demo
G Administr...	Manny Ramirez 2007 Ford Explorer Sport Trac [70192]	34 mins 1:47p		End Visit
A Moore	Kenneth Merschbrock 2008 Ford Taurus X [80250]	6/2 2:48p		End Visit
A Moore	Henry The Eighth 2008 Ford F250 [80143]	6/2 1:37p		End Visit

FIG 8

The screenshot shows a 'Deal Worksheet' for a vehicle purchase. It includes sections for Buyer (George Walker Bush), Co-Buyer, Vehicle (2007 Ford Edge SEL Plus), Trade (2006 HUMMER H1), and Deal Pushed. The main section is divided into 'Price' (Selling Price: 37,000.00), 'Summary' (Cash Price: \$38,637.00, Rebate: \$2,000.00, Trade Net: \$11,000.00, Cash Down: \$3,500.00, Total Financed: \$22,137.00), and 'Selected Terms' (Loan Term: 84, APR: 7.900 %, Payment: \$343.93). A 'Quick Quote Payment Matrix' table is also present, showing payment options for different terms and APRs.

Print	Term	APR	505.19	419.99	590.40
<input checked="" type="checkbox"/>	48	5.000 %	505.19	419.99	590.40
<input checked="" type="checkbox"/>	60	6.000 %	424.10	352.57	495.64
<input checked="" type="checkbox"/>	72	7.000 %	374.00	310.92	437.09

FIG 8.1

If a vehicle was associated with the client prior to clicking the desking icon, that vehicle info will populate the screen. To tailor the structure to fit the situation, you may tab through the remaining fields, or use the Quick Entry field with shortcut keystrokes, as shown in figure 8.2.

Purchase

Lease

Quick Entry:

Price

Selling Price: 32,315.00

Accessories:

Service Contract:

Gap:

Proc/Dgc Fee: 250.00

License Fee: 0.00

Sub Total: 32,565.00

Total Taxes: 1,938.90

Tax Breakdown

4% * 32315: 1,292.60

1.5% * 32315: 484.73

0.5% * 32315: 161.57

Summary

Cash Price: 34,503.90

Rebate:

Trade Net: 0.00

Cash Down:

Total Financed: 34,503.90

Selected Terms

Loan Term:

APR:

Payment:

Roll Payment

Key Definition

- P = MSRP (Lease Only)
- S = Selling Price
- E = Accessories
- C = Service Contract
- G = Gap
- O = Proc/Dgc Fee
- L = License Fee
- Y = Security Deposit (Lease Only)
- Q = Acquisition fee (Lease Only)
- B = Bank Fee (Lease Only)
- R = Rebate
- D = Money Down / Cash Cap Red
- M = Term
- A = APR
- U = Residual (Lease Only)
- H = Money Factor (Lease Only)
- V = Trade Value
- F = Trade Payoff
- T = Trade ACV

Quick Quote Payment Matrix

Use the matrix below to print a proposal with multiple payment options. Click on a payment to select it and populate those selected terms above. The selected terms will also print on the proposal.

% of Selling Price

Cash Down

Print	Term	APR	Payments	
<input checked="" type="checkbox"/>	36	5.000 %	1034.11	1034.11
<input type="checkbox"/>	48	6.000 %	810.33	810.33
<input type="checkbox"/>	60	7.000 %	683.22	683.22

FIG 8.2

Quick Quote Payment Matrix

Use the matrix below to print a proposal with multiple payment options. Click on a payment to select it and populate those selected terms above. The selected terms will also print on the proposal.

% of Selling Price

Cash Down

Print	Term	APR	Payments		
<input checked="" type="checkbox"/>	48	7.000 %	624.16	600.21	552.32
<input checked="" type="checkbox"/>	60	8.000 %	528.50	508.23	467.68
<input checked="" type="checkbox"/>	72	9.000 %	469.84	451.81	415.76

FIG 8.3

To present options to client, configure the Quick Quote Payment Matrix to the terms you exactly the terms you wish to present, then print the worksheet of your choice.

SELECTED PAYMENT

Once you discern which term and cash down your customer will accept, click on payment where those criteria intersect. That will make that term and rate the selected terms.

Selected Terms

Loan Term: 84

APR: 7.900 %

Payment: 343.93

Roll Payment

FIG 8.4

ROLL PAYMENT

To adjust the structure of the deal to get closer to the clients desired payment, use the Roll Payment button.

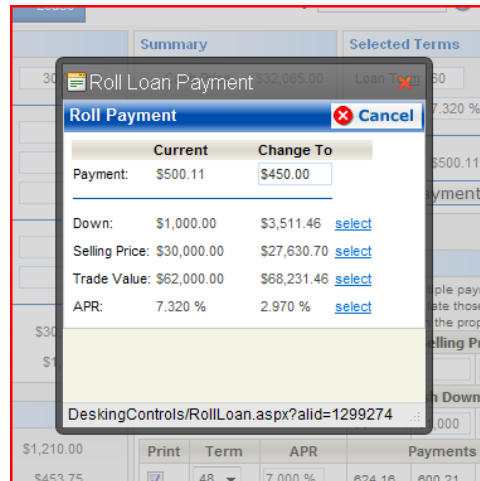


FIG 8.5

The Roll payment button will bring up a small window in which you choose which criteria to change in order to achieve your desired payment.

DESKING PAGE TOOLBAR FUNCTIONS.

Across the top of the Desking Page, there are several key functions in a tool bar.



FIG 8.6

Click on the Forms drop down list to select a single form you wish to print out.

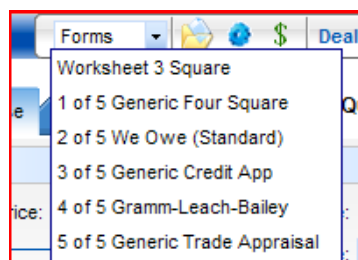



FIG 8.7

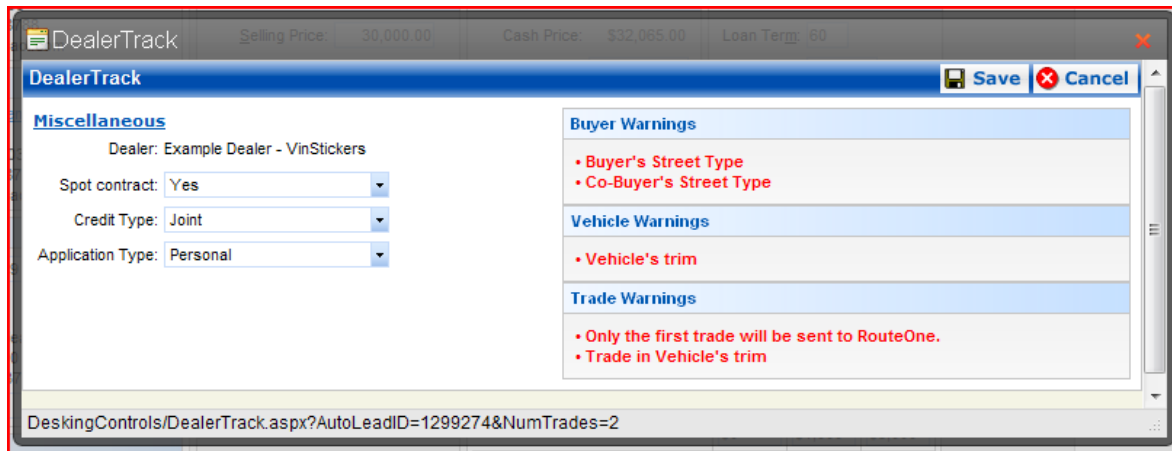
The Packet Icon -  - will populate a list of forms that you require for that type of deal, Ensuring more consistent documentation of the sale.

The Desking Settings Icon -  - is where you will set default values for doc fee, license, rates, downpayments, and tax rates.

The Gross Icon -  - toggles the gross field, so you can view or hide gross with 1 click.

DESKING INTEGRATION

Upon acceptance of terms, you can push the customer info, and deal structure to DealerTrack, Route One, and your DMS.



The screenshot shows a web application window titled "DealerTrack". At the top, there are fields for "Selling Price: 30,000.00", "Cash Price: \$32,065.00", and "Loan Term: 60". Below this is a "DealerTrack" header with "Save" and "Cancel" buttons. The main content area is divided into two columns. The left column, titled "Miscellaneous", contains fields for "Dealer: Example Dealer - VinStickers", "Spot contract: Yes", "Credit Type: Joint", and "Application Type: Personal". The right column contains three sections: "Buyer Warnings" with items "Buyer's Street Type" and "Co-Buyer's Street Type"; "Vehicle Warnings" with item "Vehicle's trim"; and "Trade Warnings" with items "Only the first trade will be sent to RouteOne." and "Trade in Vehicle's trim". At the bottom of the window, the URL "DeskingControls/DealerTrack.aspx?AutoLeadID=1299274&NumTrades=2" is visible.

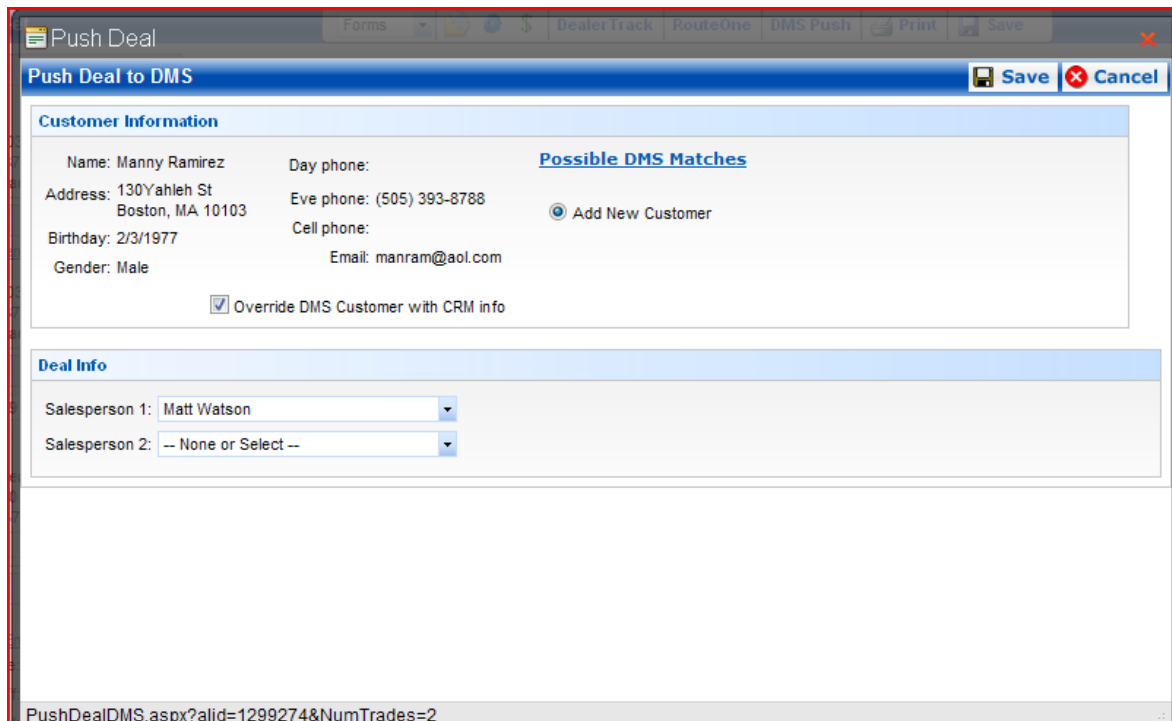
FIG 8.9

When you click on the DealerTrack or Route One button, the information is reviewed for completion. Additional information required will be brought to your attention. Hit save, and the deal and customer info will be pushed to whichever lender portal you selected.

DMS INTEGRATION

When you need the deal to be pushed to your DMS, click on the **DMS Push** button.

FIG 8.8

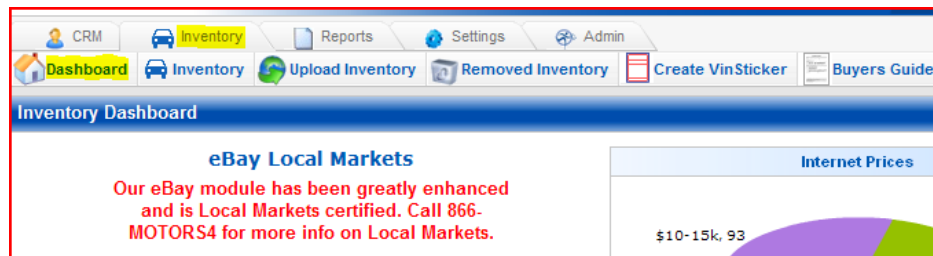


The screenshot shows a web application window titled "Push Deal". At the top, there are tabs for "Forms", "DealerTrack", "RouteOne", "DMS Push", "Print", and "Save". Below this is a "Push Deal to DMS" header with "Save" and "Cancel" buttons. The main content area is divided into two sections. The top section, titled "Customer Information", contains fields for "Name: Manny Ramirez", "Address: 130Yahleh St, Boston, MA 10103", "Birthday: 2/3/1977", "Gender: Male", "Day phone:", "Eve phone: (505) 393-8788", "Cell phone:", and "Email: manram@aol.com". There is a "Possible DMS Matches" section with a radio button for "Add New Customer". A checkbox labeled "Override DMS Customer with CRM info" is checked. The bottom section, titled "Deal Info", contains fields for "Salesperson 1: Matt Watson" and "Salesperson 2: -- None or Select --". At the bottom of the window, the URL "PushDealDMS.aspx?alid=1299274&NumTrades=2" is visible.

Click save and the customer, vehicle info, trade info, and deal structure will migrate.

SECTION 9. INVENTORY DASHBOARD

FIG 9.1



This view, accessible by clicking on the Dashboard button under the inventory tab, offers quick access to specific segments of your pre owned inventory via click through graphs.

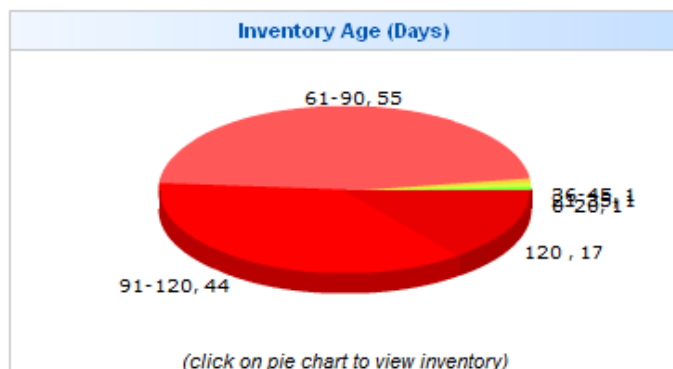
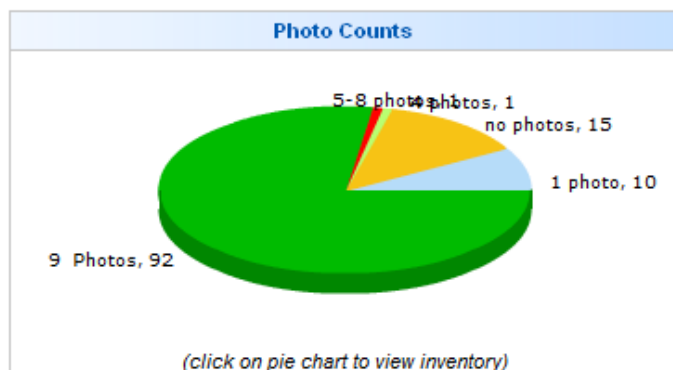
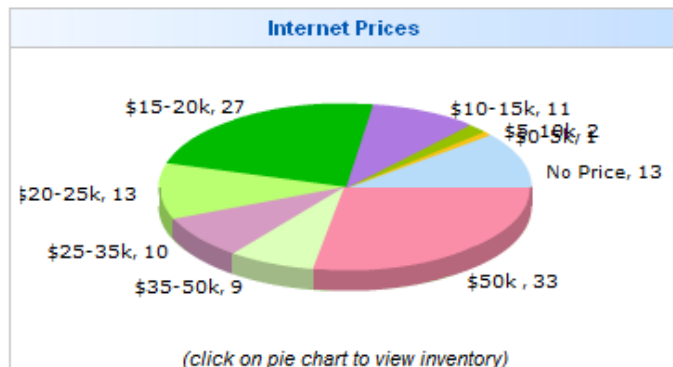


FIG 9.2

Selected Inventory						
Click on the vehicle's Stock # to view/edit the vehicle.						
Stock #	Year	Make	Model	Web \$	Photos	Age
2P4942	2003	Mercury	Grand Marquis	\$10,995	4	127

FIG 9.3

MANAGE INVENTORY

FIG 9.4

CRM

Inventory

Reports

Settings

Dashboard

Inventory

Upload Inventory

Removed Inventory

Create VinSticker

Buyers Guide Back

eBay

Search:

Example Dealer - VinStickers

Davy Jones Watson viewing as C Dub

Logout

News - Training - Support

Home >> Manage Inventory

Search:

Pre-Owned - All

Photos			Stock #	eBay	Web	VS	VB	BG	Yr	Make	Model	Trim	VIN	Miles	Age	Web \$	Lot \$
			P2261						07	Bentley	Continental	GTC	SCBCR73W97C049432	4,697	85	\$179,900	
			PC2270						08	Mercedes-Benz	SLR McLaren		WDDAK78FX8M001492	93	79	\$513,100	
			PET5343						05	Dodge	Viper	SRT10	1B3JZ6S245V500906	7,660	78	\$62,900	
			56127960						05	GMC	Envoy XL	SLE	1GKES16S856127960	37,449	72	\$16,988	
			79218359						07	Chevrolet	Impala	LT	2G1WT56H579218359	30,508	91	\$12,988	
			7U190029						07	Buick	Lucerne	CXL	1G4HD57237U190029	28,452	91	\$21,988	
			7B075359						07	Chevrolet	Aveo		KL1TD56607B075359	26,309	107	\$9,988	
			PT7375						05	Mercedes-Benz	SL55K	AMG	WDBSK74F65F090364	13,923	85	\$67,900	
			TZ144312						07	Chevrolet	Silverado 1500		1GCEC19V37Z144312	21,281	79	\$17,988	

Photos

Stock #

P2244

FIG 9.5

Web	VS	VB	BG	Yr	Make	Model	Trim	VIN	Miles	Age	Web \$	Lot \$
				05	Porsche	911		WP0AA29975S717005	9,557	114	\$57,900	

FIG 9.6

UPLOADING INVENTORY

Upload Inventory

If inventory cannot be pulled from your DMS, we may be able to allow you to upload a file that contains your inventory. Please email support@vinmanager.com to inquire about a potential new inventory format.

Inventory Format:

Excel

Inventory Effect:

Append New Inventory - Remove None

Inventory File:

Browse...

Inventory Type:

All

☐ Override prices in the system with prices in the file

☐ Override colors in the system with colors in the file

Upload

[Click here for a sample Excel file to view the supported format](#)

FIG 9.7

Inventory Format:

Excel

Inventory Effect:

Append New Inventory - Remove None

Inventory File:

Append New Inventory - Remove None

Inventory Type:

Append New Inventory - Remove Missing Inventory from All

FIG 9.8

FIG 9.9

Inventory Format:

Excel

Inventory Effect:

UCS New Cars

Inventory File:

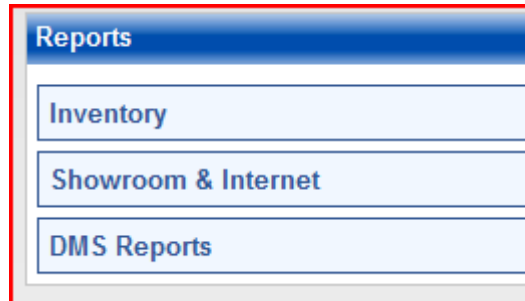
UCS All Cars

Inventory Type:

Excel

SECTION 10. REPORTS

The reporting functions are divided into 3 categories – Inventory, Showroom and Internet, and DMS Reports. In this guide we will summarize each report..



On the Reports page, these dynamic headers expand to reveal the list of reports under each topic.

Inventory Reports

Inventory List	Allows filtered views of current inventory - view no pics, print barcodes,
Aging	Click thru Pie Chart like the Inventory Dashboard
Equipment	Lists all equipment associated with each vehicle. Helpful when writing ad copy.
Website Gallery Vehicle Views	Graphs how often vehicles are viewed online. Ranks units by popularity.
Vehicle Hits	Ranks inventory by # of views, # of leads, and links to actual leads per unit.
Printing Activity Log	Tracks which Window Stickers and Buyers guides have been printed.

Showroom & Internet Reports

Worklist Report	Printable Work Plans for all users.
DMS to CRM Sales/Customer Matching	This report must be used to sync data that doesn't automatically match between DMS and CRM. Crucial step to ensure accuracy.
Lead Source Performance	Analyze the effectiveness of different lead providers.
Activity Breakdown	Excellent tool for evaluating how well personnel work the sales process.
Leads by Source	Click thru bar chart shows volume of leads, sortable by status and links to their names.
Appointments	Sort appointments by salesperson, status, and Date Range
Bad Leads	Use this to reprint adjusted invoices and avoid paying for leads you already have.
Lost Leads	Click thru bar chart showing volume of lost leads, linked to their names.
Sold Leads	View # of sold leads verses total lead volume by source.
Response Times	More powerful version of response time pie chart allows custom date ranges, users, etc.
Lead Source ROI	Best report for making decisions about how effectively you are spending advertising \$.
Customer Search	Same as Advanced Search on toolbar.
Desk Log	Same as Desk Log Dashboard
Sold Log	Same as Sold Log Dashboard
Message Log	Same as Message Log Dashboard
Email Read Log	Includes filters to view date ranges and specific users.

Sales Goals Reports	Monitor how all users are tracking to meet sales goals.
Unanswered Email Replies	Includes ability to break down by salesperson
Export Customers	Export Customer database to excel, filtered by status.
Dealership CRM Activity Summary	Single/Multi Rooftop view of Activity
Showroom Capture	Single/Multi Rooftop view of how well salespeople are capturing information.
Internet Performance Summary	Single/Multi Rooftop view of key internet dept metrics.
Showroom Performance Summary	Single/Multi Rooftop view of key showroom metrics
Showroom Performance Summary by TO Manager	Track how well TO mgrs close on initial visits, bebacks, and total interactions.
Showroom Performance Summary by Salesperson	Track how well Salespeople close on intial visits, bebacks, and total interactions
Monthly Activity by Salesperson	Track key performance metrics by salesperson.
Internet Performance Summary by Make	See which makes are producing the most leads, appointments, and sales via Internet.

DMS Reports

Sold Log	Detailed view of DMS Sold Data
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Sales Person Breakdown

View F&I Product Penetrations and Analyze
Deal Gross by Salesperson

Finance Manager Summary

View F&I Product Penetrations and Analyze
Deal Gross by F&I Manager
Bottom of Form

Notes

MANAGER LEVEL ACKNOWLEDGEMENT

I, _____, have attended the VinSolutions Training course, completed the following modules, and certify my proficiency with this program.

1. Dealer Dashboard – Customizing views, selecting defaults, Kiosk mode and using Daily Activity Log to manage sales force.
2. Desking – Create, edit, save, and push deal structures.
3. Inventory – Search, edit, upload, and remove inventory.
4. Reports – Use reports to monitor effectiveness.

Signed this ____ day of _____, 2008.

Trainer: _____