MANAGER WORK BOOK

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INFORMATION COVERED

- DEALER DASHBOARD
- DESKING
- INVENTORY MODULE
- REPORTS

SECTION – 1. DEALER DASHBOARD

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

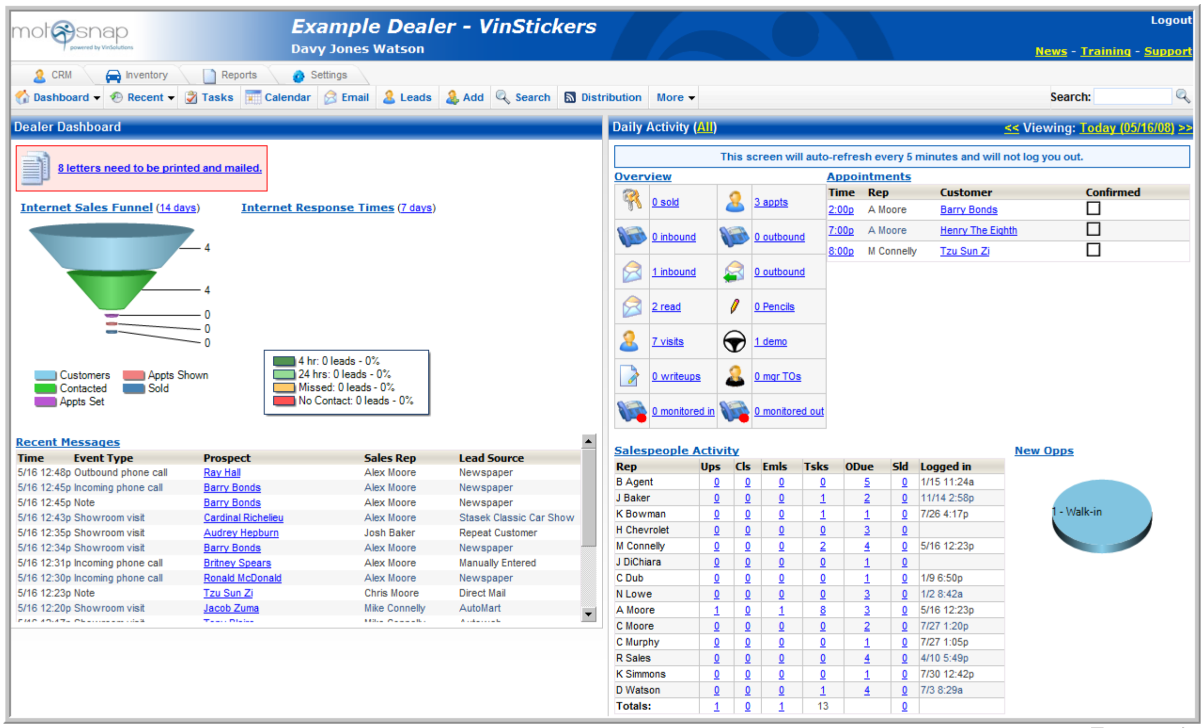
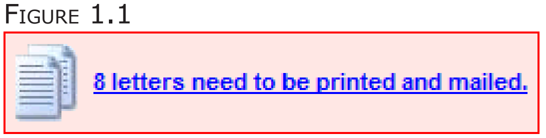


FIGURE 1

FIGURE 1.1



Before printing, pre load printer correctly with letterhead

Click here to choose timeframe and default dashboard.

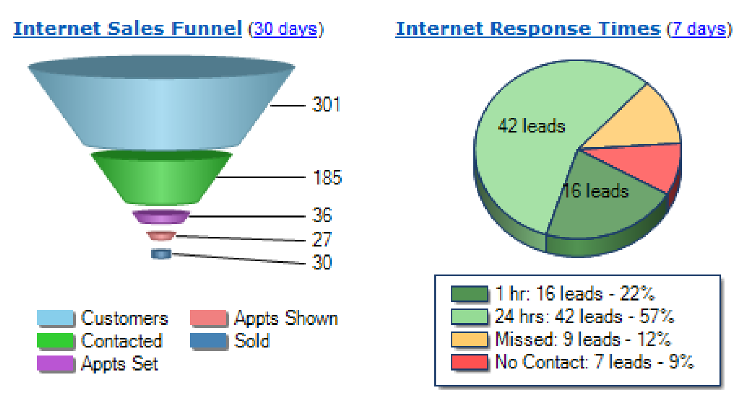


FIGURE 1.2

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.

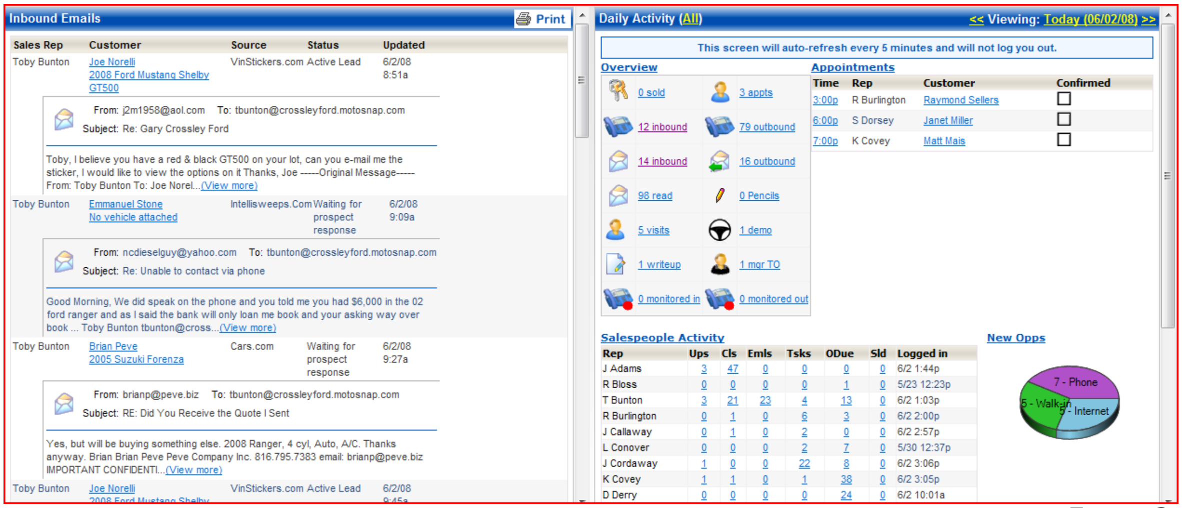
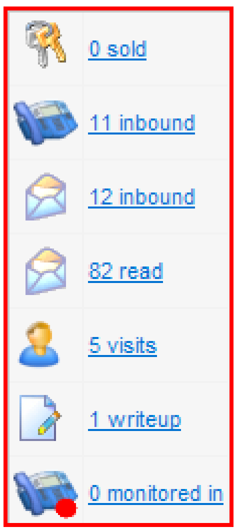


Figure 2

Fig 2.1



View Sold.

Incoming calls.

Emails sent in.

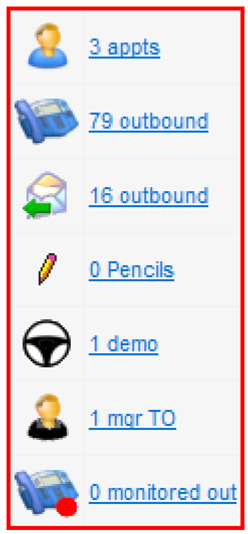
read by clients

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.

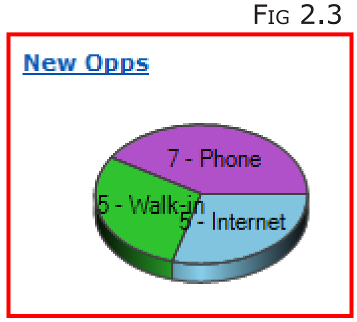
Proposals not TO’d to F&I

# 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

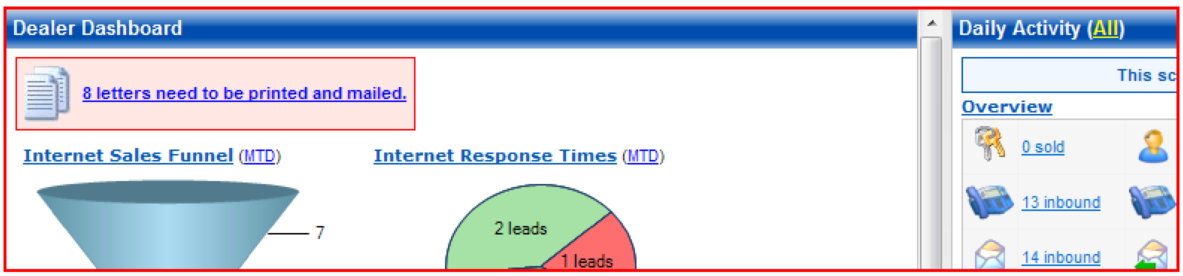

Appointments

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

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

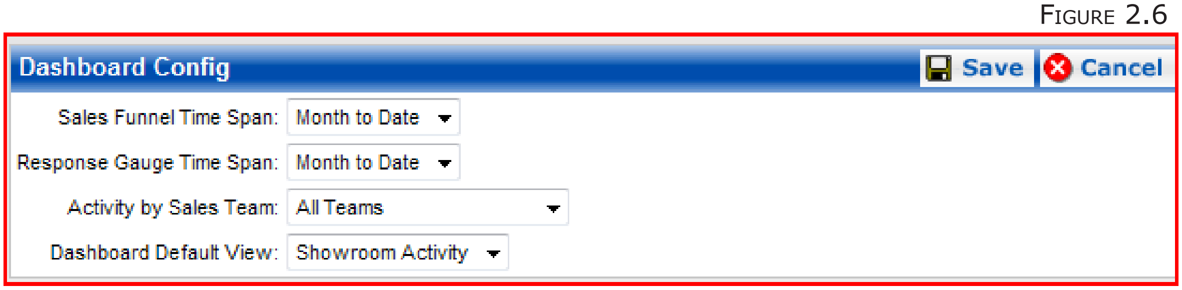
CUSTOMIZE DATE RANGES AND DEFAULT VIEWS.

FIGURE 2.5



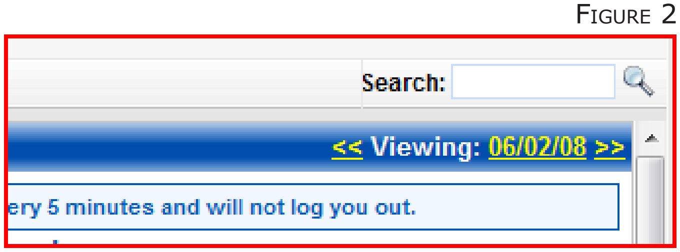
By clicking on links from the dealer dashboard or Daily Activity Screen, you can access the configuration page.

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

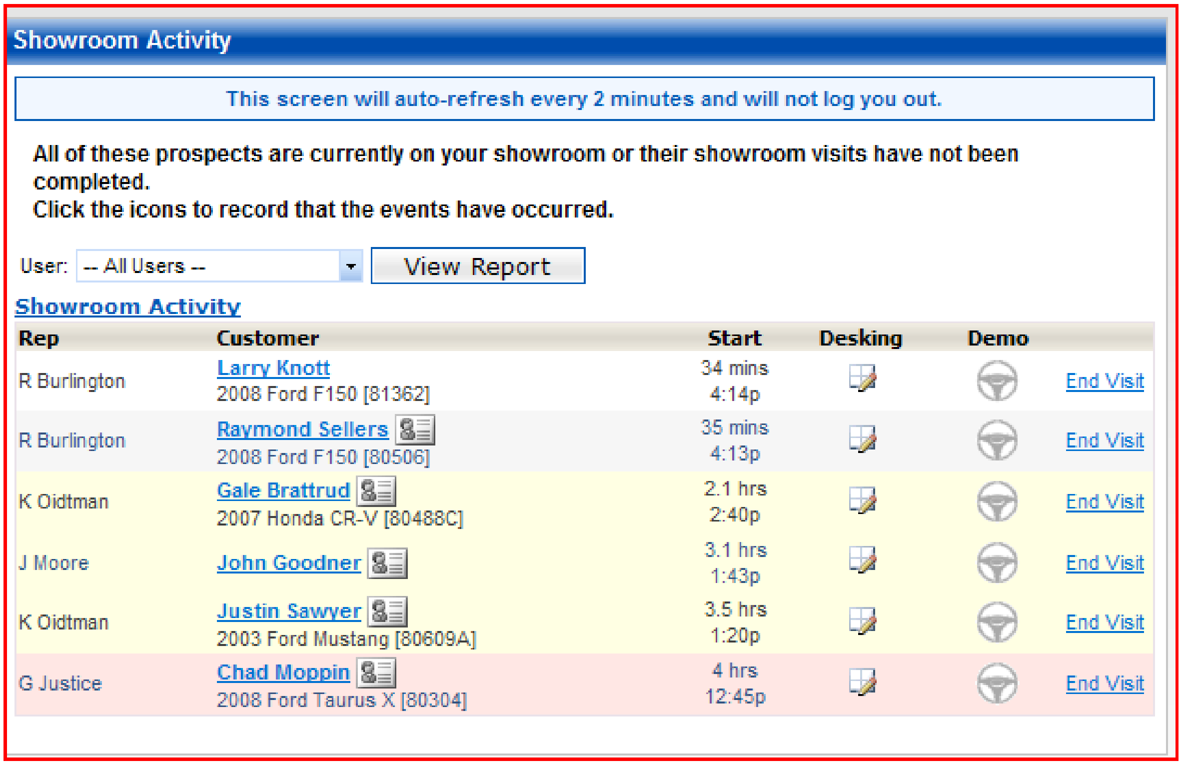


Additionally, you can access different days for the right side of the screen by selecting the arrows or date.

SECTION 3. THE SHOWROOM ACTIVITY

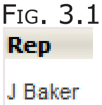
This is a real time view of customers on the showroom floor.

FIGURE 3



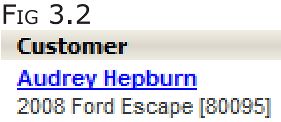
The shading behind the customer record indicates how long the visit has been active: White < 1 hour. Yellow is 1-4 hours. Red is >4 hours. Click on DL to view scanned image if your dealership is set up for one.

FIG. 3.1



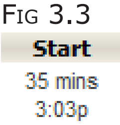
Salesperson indicator

FIG 3.2



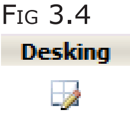
Click on customer to open the Customer Dashboard. Make sure there's a vehicle associated with every customer.

FIG 3.3



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

FIG 3.4

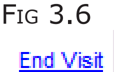


Click here to create a worksheet for this client.

FIG 3.5

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

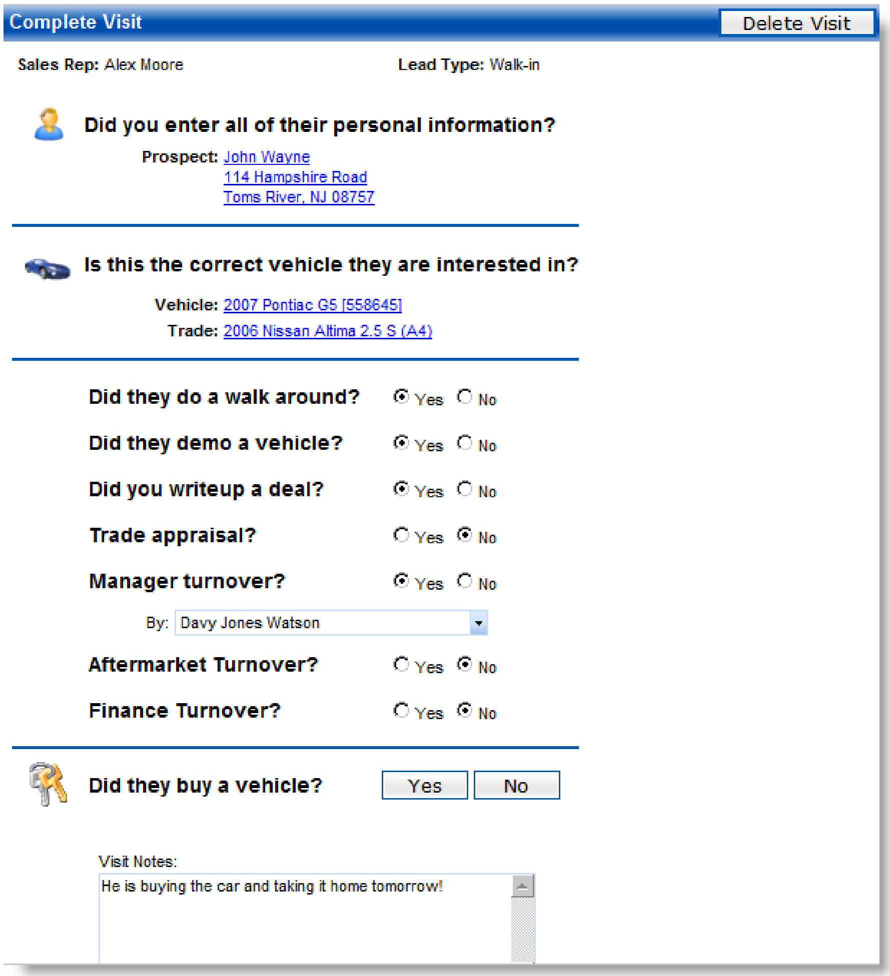
FIG 3.6



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

ENDING A VISIT

FIGURE 3.7



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

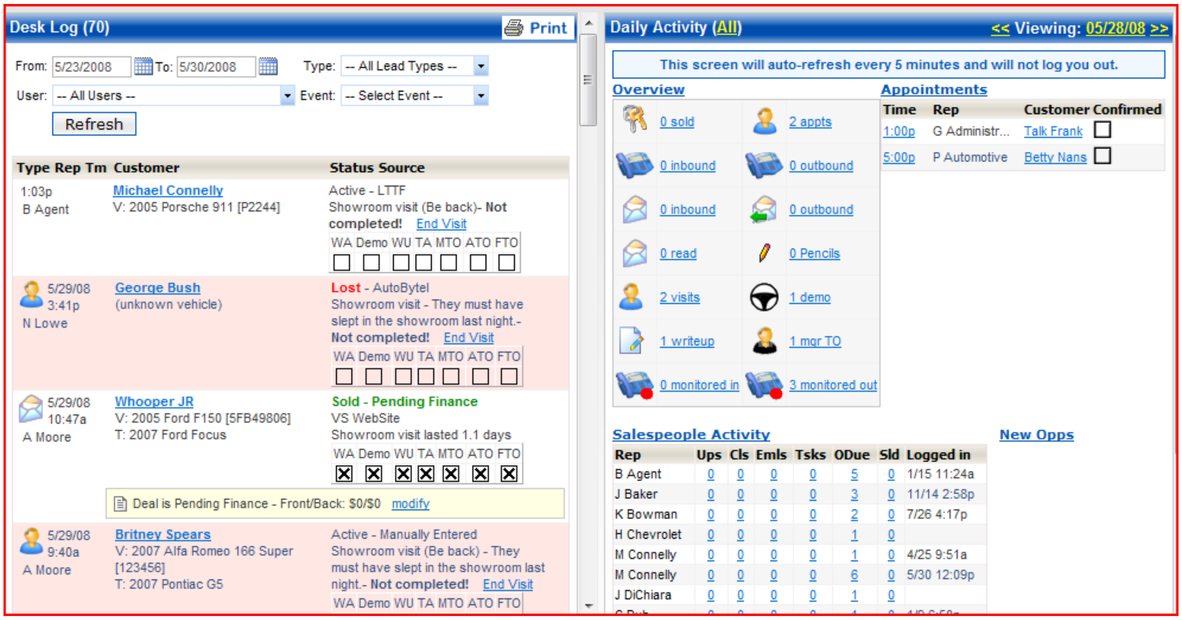
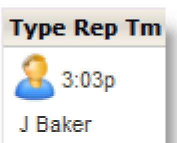


FIG 4.1



Type, Rep, and Time. Lots of info in this little box.

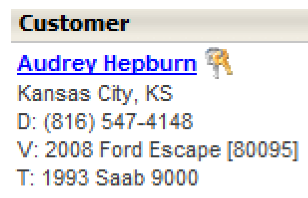


FIG 4.2

Contracted deals will show this field on the desk log.

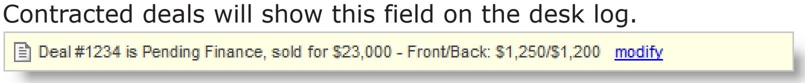


FIG 4.3

Traditional steps to the sale chart.

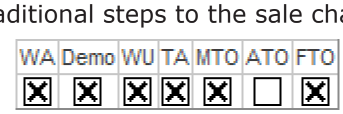
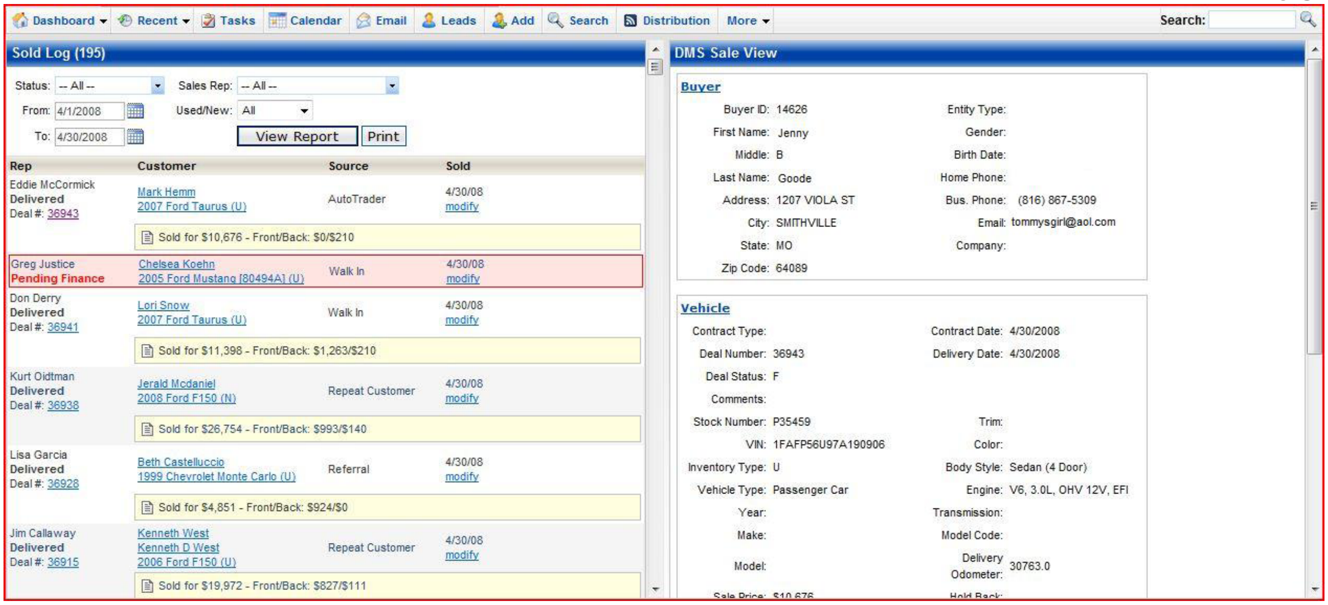


FIG 4.4

SECTION 5. SOLD LOG

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

Fig 5



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.

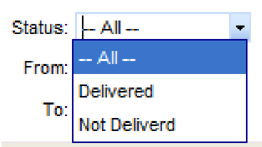


Fig 5.1

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

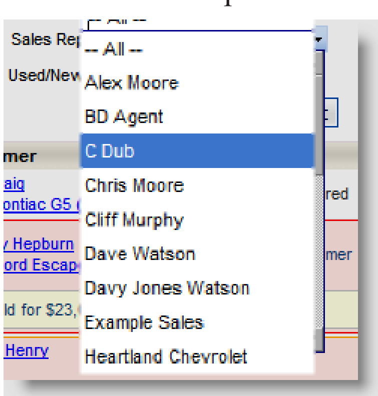


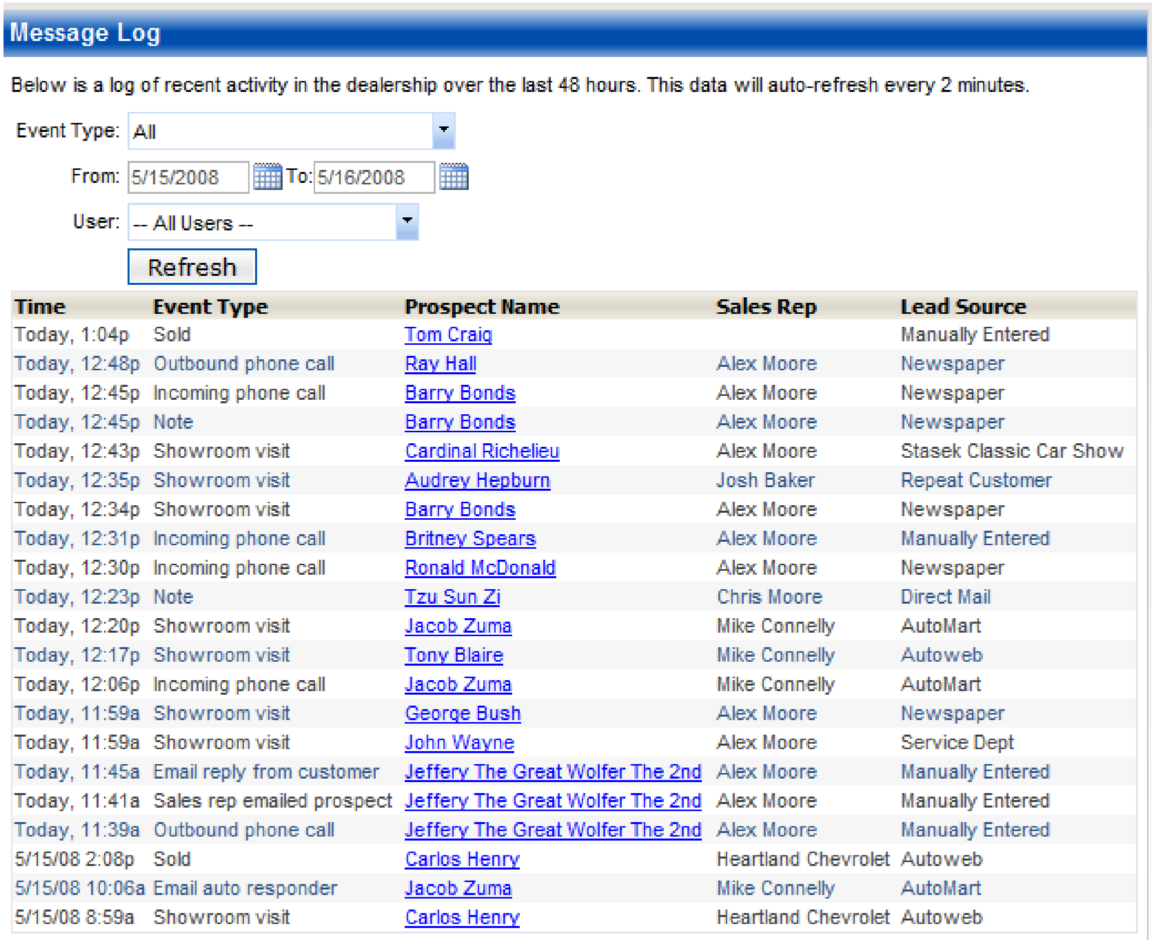
Fig 5.2

SECTION 6. THE MESSAGE LOG

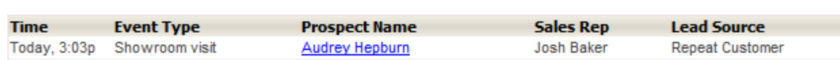
This log will be used to track all of a users activity in the database. This is how you monitor the activities of your staff.

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



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

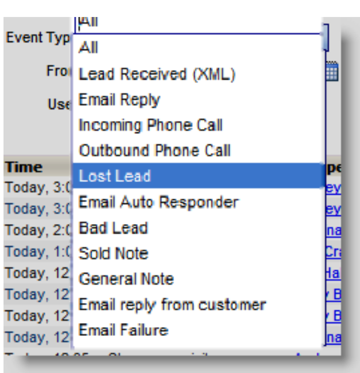


FIG 6.3

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.

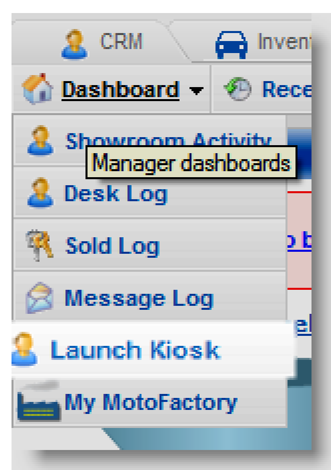


FIG 7.2

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.

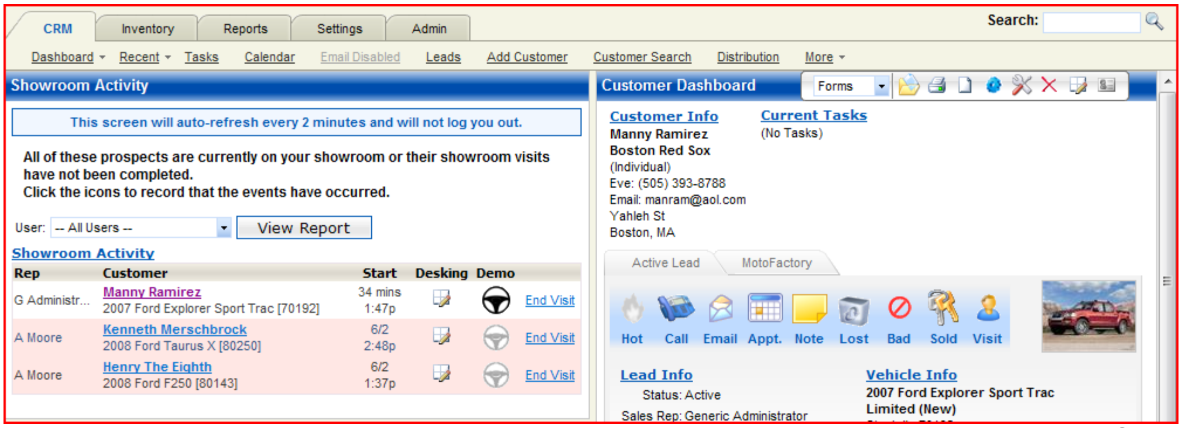


Fig 8

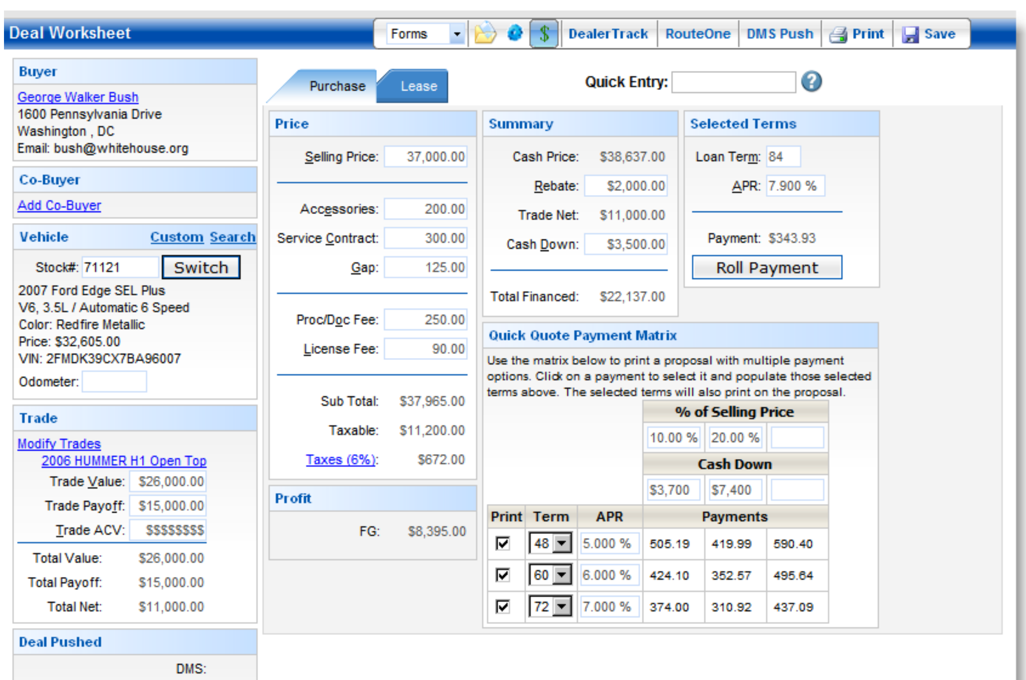


Fig 8.1

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.

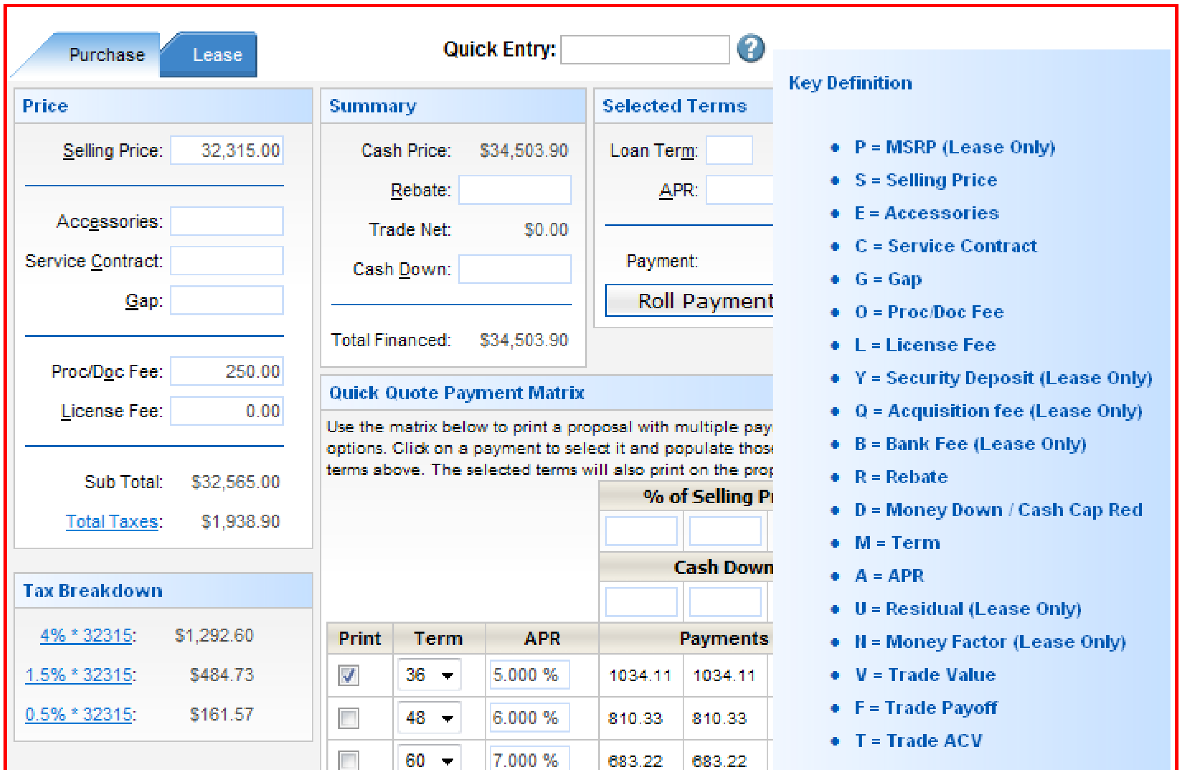


Fig 8.2

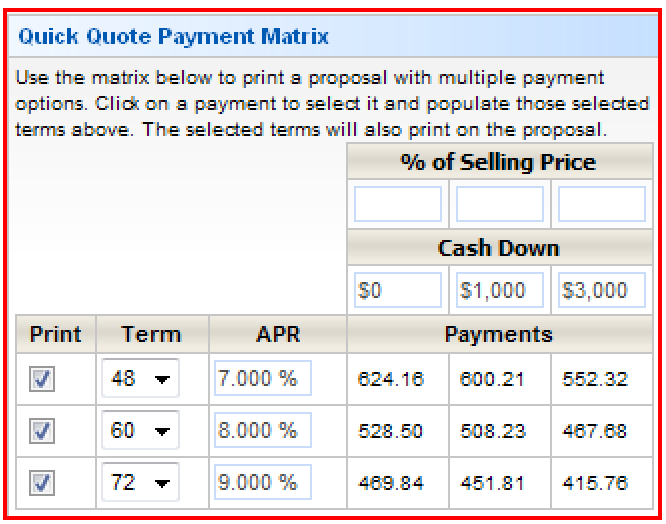


Fig 8.3

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.

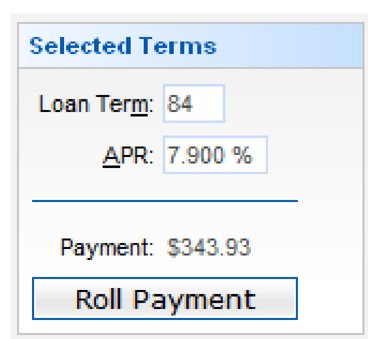


Fig 8.4

ROLL PAYMENT

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

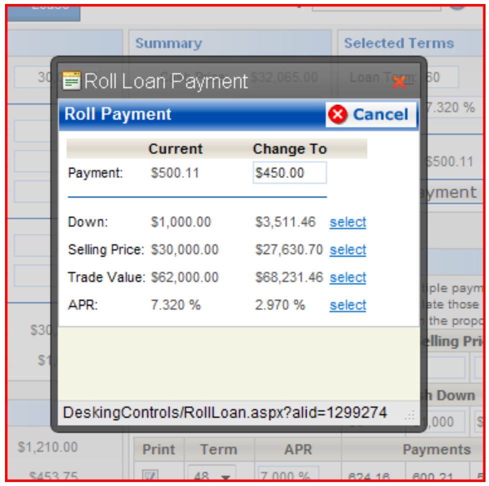


FIG 8.5

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.

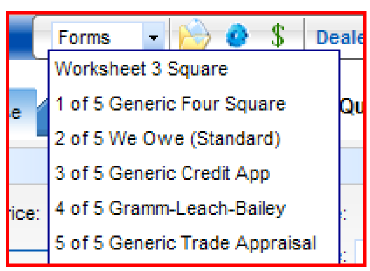


FIG 8.7

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.

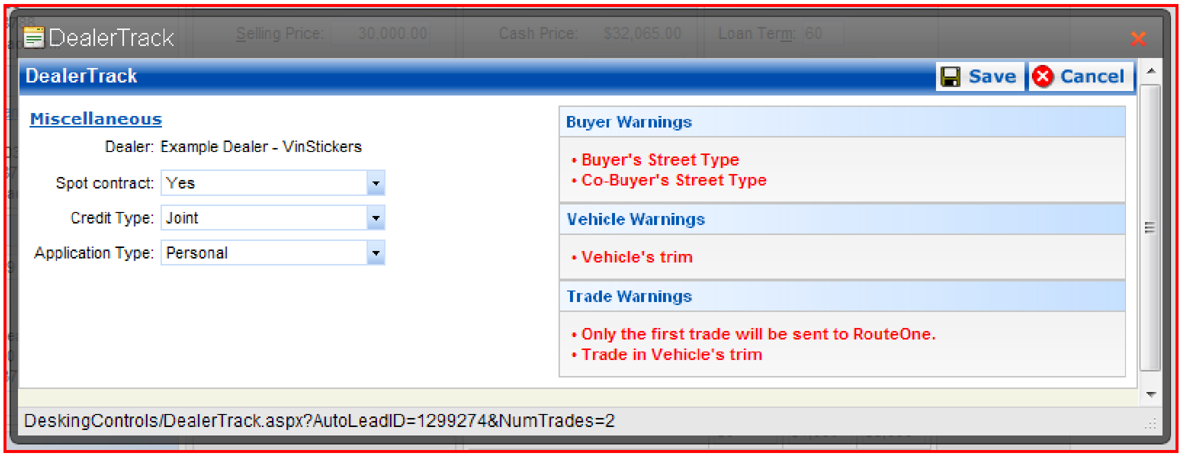


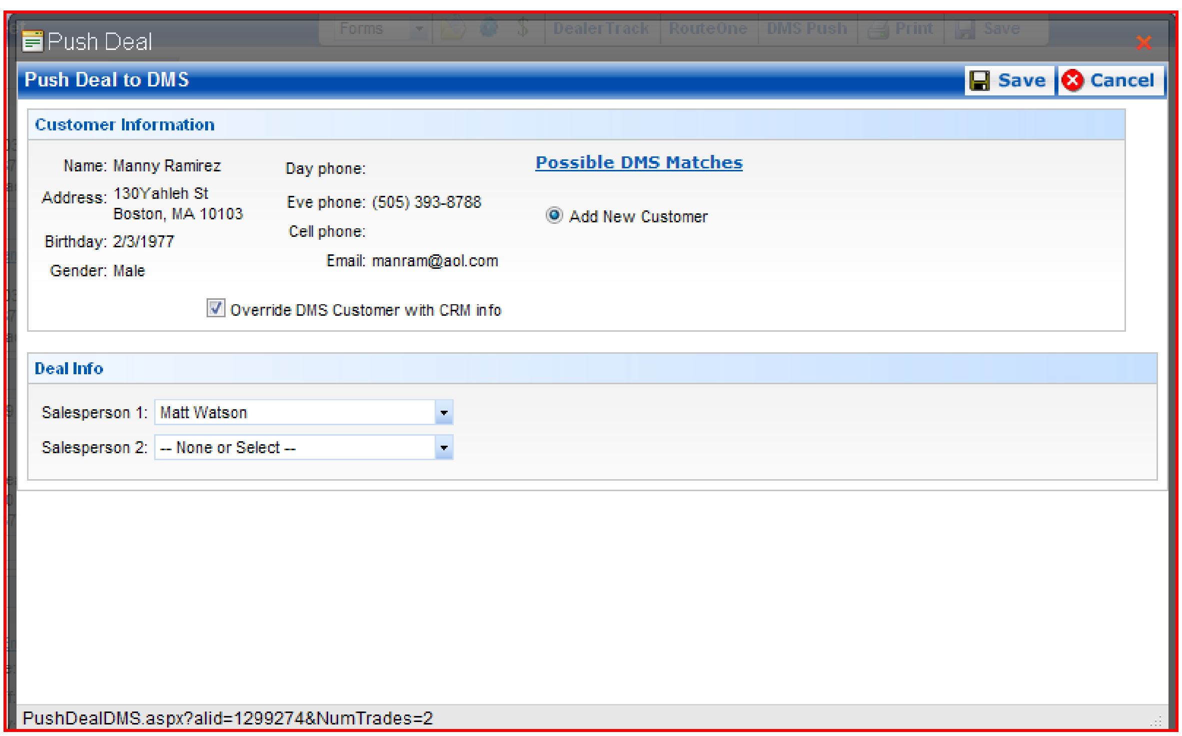
Fig 8.9

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.

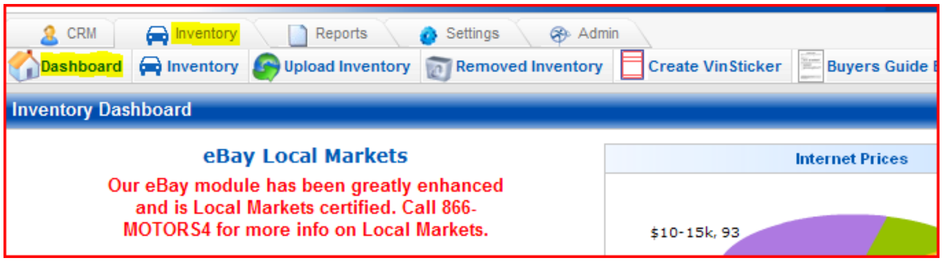
Fig 8.8



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.

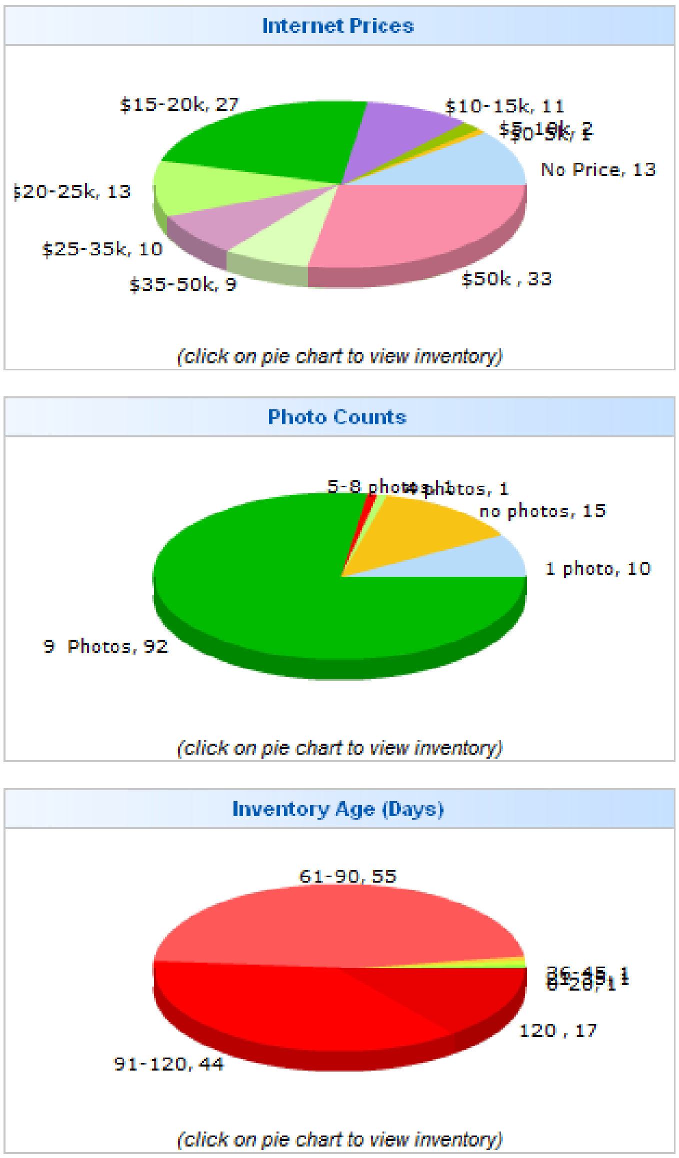
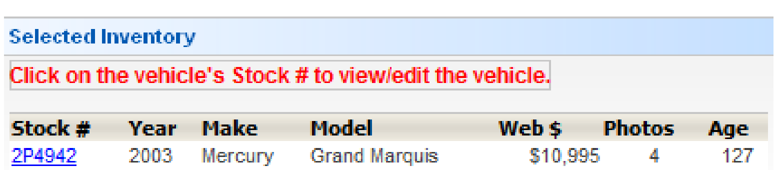


Fig 9.2



Selected Inventory

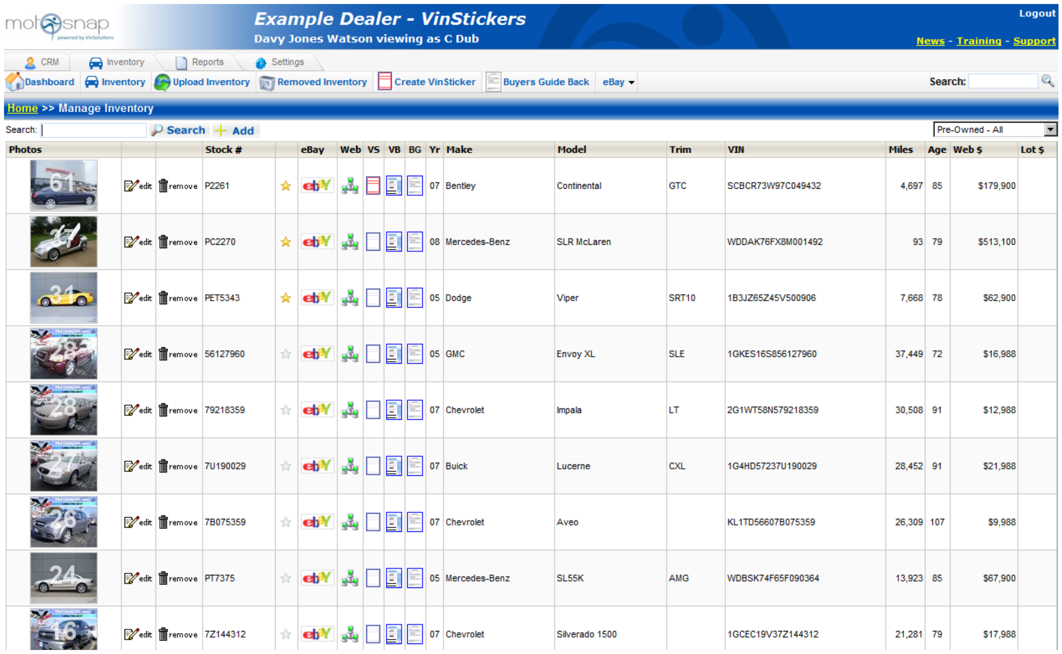
Click on the vehicle's Stock # to view/edit the vehicle.

Stock #	Year	Make	Model	Web $	Photos	Age
2P4942	2003	Mercury	Grand Marquis	$10,995	4	127

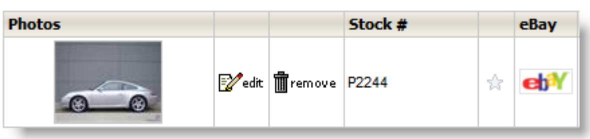
Fig 9.3

MANAGE INVENTORY

Fig 9.4



Photos			Stock #		eBay	Web	VS	VB	BG	Yr	Make	Model	Trim	VIN	Miles	Age	Web $	Lot $
	edit	remove	P2261							07	Bentley	Continental	GTC	SCBCR73W97C049432	4,697	85	$179,900	
	edit	remove	PC2270							08	Mercedes-Benz	SLR McLaren		WDDAK76FX8M001492	93	79	$513,100	
	edit	remove	PET5343							05	Dodge	Viper	SRT10	1B3JZ65Z45V500906	7,668	78	$62,900	
	edit	remove	56127960							05	GMC	Envoy XL	SLE	1GKES16S856127960	37,449	72	$16,988	
	edit	remove	79218359							07	Chevrolet	Impala	LT	2G1WT58N579218359	30,508	91	$12,988	
	edit	remove	7U190029							07	Buick	Lucerne	CXL	1G4HD57237U190029	28,452	91	$21,988	
	edit	remove	7B075359							07	Chevrolet	Aveo		KL1TD56607B075359	26,309	107	$9,988	
	edit	remove	PT7375							05	Mercedes-Benz	SL55K	AMG	WDBSK74F65F090364	13,923	85	$67,900	
	edit	remove	7Z144312							07	Chevrolet	Silverado 1500		1GCEC19V37Z144312	21,281	79	$17,988	



Photos			Stock #		eBay
	edit	remove	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

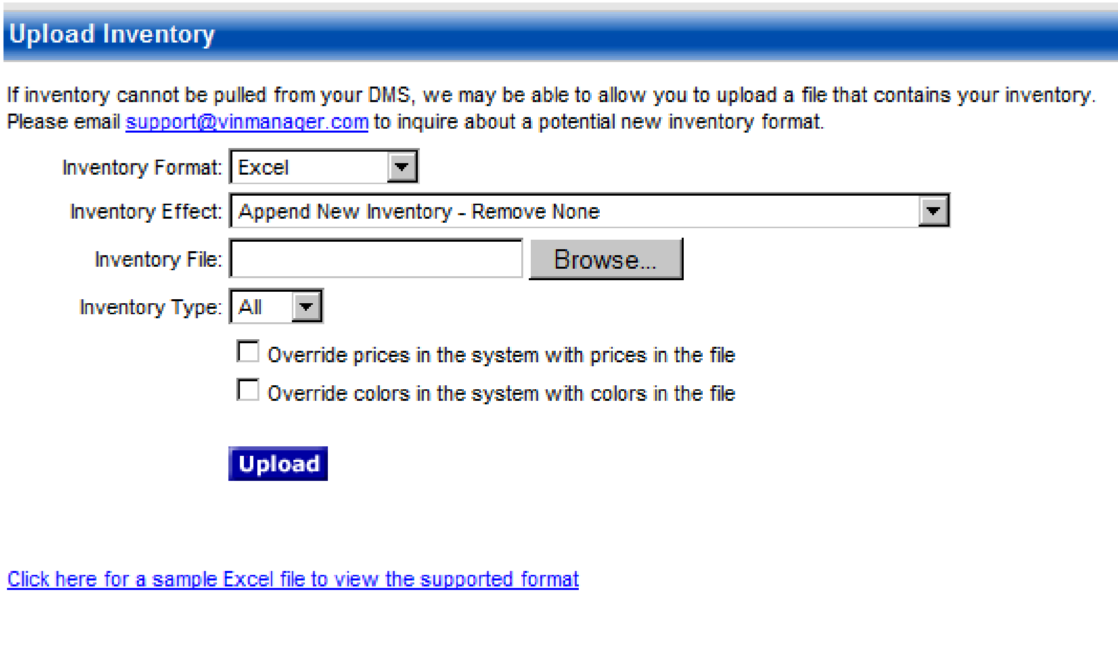


FIG 9.7

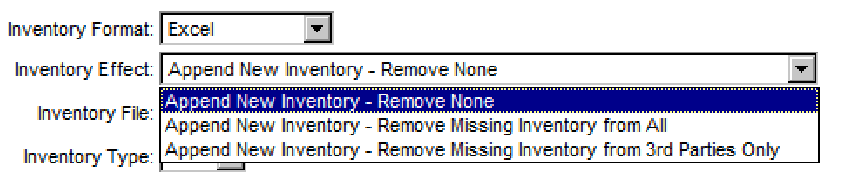
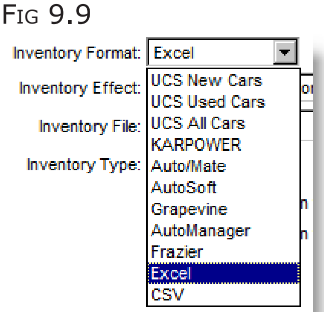


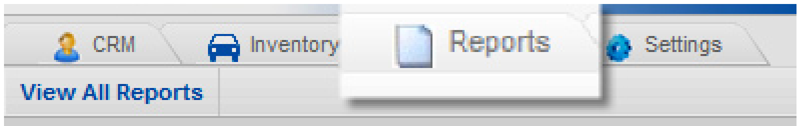
FIG 9.8

FIG 9.9



SECTION 10. REPORTS

The reporting functions are divided into 3 categories – Inventory, Showroom and Intenet, 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

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.

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Trainer: ____