

# SALESPERSON'S OVERVIEW

TM



# **INFORMATION COVERED**

- SALESPERSON'S TASK LIST
- HOW TO ADD A CUSTOMER
- UTILIZE THE CUSTOMER DASHBOARD
- SEARCH FOR A CUSTOMER OR A VEHICLE

# THE TASK LIST – YOUR ROADMAP TO QUALITY FOLLOW UP.

Go to [www.motosnap.com](http://www.motosnap.com)

Your User ID: \_\_\_\_\_ Default Password: Password1

Go to Login page



Viewing Task List

**My Tasks (11)**

This screen will auto-refresh every 5 minutes and will not log you out.

**New Leads (1)**

Customer	Hot	Source	Updated	Age
Whooper JR 2005 Audi A4 (A20543)		VS WebSite	11/12/06 7:52p	550

Call to To Confirm Template: "VS-Appointment Confirmation"

**Replies (1)**

Customer	Hot	Source	Updated	Age
Jeffery The Great Wofler The 2nd 2007 Pontiac G5 (J558645)		Manually Entered	5/16/08 11:41a	213

Call to To Confirm Template: "VS-Appointment Confirmation"

The prospect just viewed this email. (dismiss)

Reply to customer email (dismiss)

**Follow Ups (3)**

Customer	Hot	Source	Updated	Age
Jerry Roseman		Newspaper	2/5/08 1:58p	101
Susan Perna		Service Dept	2/21/08	101

**My Dashboard**

You have 2 customer alert(s).

**My Sales Goals**

No sales goals configured.

**Appointments**

Type	To Rep	Time	Customer	Description	By
	Alex Moore	Today 9:15a Completed	Bobby Ken	Test Appt 2005 Porsche 911 (P2244)	Alex Moore

**Recent Leads (72 Hours)**

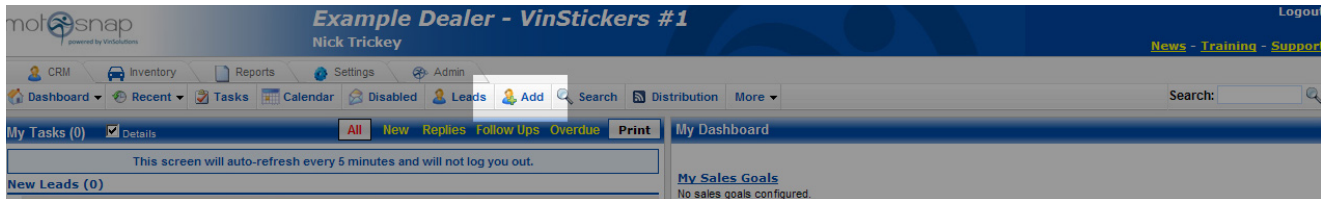
Customer	Hot	Source	Updated	Age
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No leads to display.

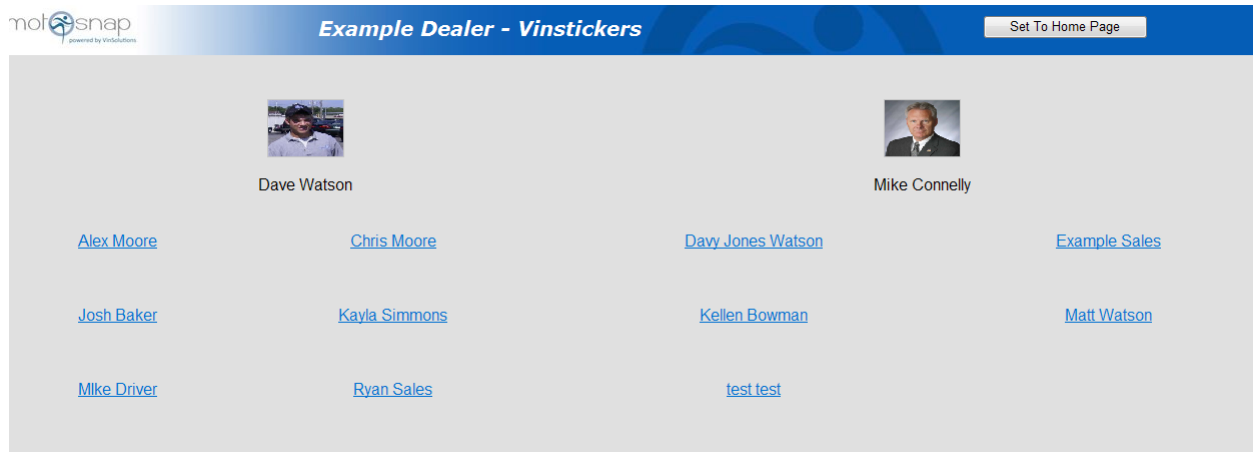
The task page is an overview of your scheduled workday at a glance. Here you see new leads, replies from customers, current follow up tasks, overdue tasks, sales goals, appointments, and recent leads over the last 72 hours.

# ADDING A CUSTOMER

From the tabs, select Add:



OR select your name in Kiosk mode.



Kiosk allows you to simply click on your name for quick data entry, and eliminating the need to log in.

Enter land line listed phone number.

A screenshot of the 'Add Customer' form in the VinStickers software. The form includes fields for First Name, Last Name, Evening Phone (with a '(Reverse)' link), Email (with a '(validate)' link), Stock # (with a 'Find...' button), and Source (a dropdown menu). There are radio buttons for Type: Walk-in, Phone, and Internet. A checkbox is labeled 'Is the customer in the showroom?'. At the bottom, there is an '+ Add' button.

View results and confirm accuracy of data.

A screenshot of the 'Add Customer' form with the 'Reverse Phone Number' results panel open on the right. The results panel displays the following information: Phone Number: (913) 825-6124, First Name: VINSTICKERS, LL, Last Name: (blank), Address: (blank), City: (blank), State: (blank), and Postal Code: (blank). The 'Add Customer' form on the left is partially visible, showing the same fields as in the previous screenshot.

If results aren't accurate or complete, add info in fields on the left. Use this opportunity to check spelling, and capture email address.

# ADDING A CUSTOMER.

Select a vehicle, Source, and Type, then click Add.

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Jim Nelson viewing as Heartland Chevrolet

CRM Inventory Reports Settings Admin

Dashboard Recent Tasks Calendar Email Leads Add Search Distribution More

Search:

**Add Customer**

First Name: Kenny [Enable Scanner](#)

Last Name: Merschbrock

Evening Phone: (913) 825-6124 [\(Reverse\)](#)

Email: kmerschbrock@vinsolutions.com [\(validate\)](#)

Stock #: [Find...](#)

Source: Radio

Type: ☒ Walk-in ☐ Phone ☐ Internet ☐ Service ☐ Parts Order

Is the customer in the showroom? ☒

[+ Add](#)

**Inventory List**

Search:

☐ Pre-Owned ☐ New ☒ All

**Year Make Model**

**2004 Ford Taurus SE**  
V6, 3.0L, DOHC #123456 Lot: \$9,500  
Automatic 4 Speed 20,000 mi Internet: \$9,500  
Burgandy VIN: 165660  
Grey interior

**2007 Pontiac G5**  
L4, 2.2L, DOHC 16V #559845  
VIN: 127811

It is Mandatory that a source is chosen. It is also necessary to indicate whether or not that the customer is on the showroom floor.

Occasionally, a phone # or name may trigger a possible match for an existing customer record.

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Example Dealer - VinStickers

Alex Moore

CRM Recent Tasks Calendar Email Leads Add Search Sold Log Distribution My Settings

Search:

**Add Customer**

First Name: Barry [Enable Scanner](#)

Last Name: Bonds

Evening Phone: (913) 825-6124 [\(Reverse\)](#)

Email: Roidrage@hotmail.com [\(validate\)](#)

Stock #: 71053 [Find...](#)

Source: Newspaper

Type: ☒ Walk-in ☐ Phone ☐ Internet

Is the customer in the showroom? ☒

[+ Add](#)

**Pick Customer**

[Add New](#)

Customer	Created	
Dwatson test	Ryan Sales 10/19/06 03:24 PM	<a href="#">Select</a>
Phone: 9138256124 Email: support@vinstickers.com		
12900 Metcalf Ave Overland Park, KS 66213 Phone: 9138256124 Email: No Email	BD Agent 03/13/07 12:05 PM	<a href="#">Needs Approval</a> <a href="#">Select</a>
12900 Metcalf Ave, Ste 140 Overland Park, KS 66213 Phone: 9138256124 Email: No Email	08/28/07 12:23 PM	<a href="#">Needs Approval</a> <a href="#">Select</a>
Matt Watson 12900 Metcalf Ave Overland Park, KS 66213	Nancy Lowe 11/29/07 09:17 AM	<a href="#">Needs Approval</a> <a href="#">Select</a>

When a unique record is created, the expanded customer screen will be displayed, alongside the customer dashboard.

Recent Tasks Calendar Email Leads Add Search Sold Log Distribution My Settings

Search:

**Customer Information**

Customer Additional Information CoBuyer - Information CoBuyer - Additional Information

**Customer Information**

First Name: Barry Title: -- Select --

Last Name: Bonds Middle Name:

Suffix: Nick Name:

Company: Day Phone:

Address: Eve Phone: (888) 234-5678

City: Cell Phone:

State: -- Select State -- Fax:

Zipcode: Email: Roidrage@hotmail.com

Type: Individual Alt Email:

Preferred Contact: -- Select --

**Other Information**

Do Not Call: ☐ Birth Day:

Do Not Email: ☐ Anniversary:

Do Not Mail: ☐ Gender: -- Select --

**Customer Dashboard**

**Customer Info**

Barry Bonds  
(Individual)  
Eve: (888) 234-5678  
Email: roidrage@hotmail.com

**Current Tasks**

(No Tasks)

**Active Lead**

MotoFactory

**Lead Info**

Status: Active  
Sales Rep: Alex Moore  
Created: 5/16/08 12:34p  
Source: Newspaper (Walk-in)  
Contacted: Yes

**Vehicle Info**

2007 Ford Focus ST (New)  
Stock #: 71053  
VIN: 1FAHP38Z17W295111  
Engine: L4, 2.3L, DOHC  
Trans: Manual 5 Speed  
Color: Infra-Red Clearcoat

**Vehicle(s) of Interest**

Click to add additional vehicles of interest

**Trade-in Info**

(none entered)

**Last Contact:** Friday, May 16, 2008 12:34 PM (1 of 1)

This screen allows you to collect more detailed information about the clients, as well as access the Dashboard.

# CUSTOMER DASHBOARD

Main customer information page.

The screenshot shows a web application titled "Customer Dashboard". At the top, there is a "Forms" dropdown menu and several icons. The main content area is divided into two columns. The left column, titled "Customer Info", displays details for "Barry Bonds (Individual)", including his phone number "(888) 234-5678" and email "roidrage@hotmail.com". The right column, titled "Current Tasks", shows an appointment for "Friday 5/16/08 2:00 PM" with the description "He's Hitting a Home Run For Us" and a note to "Follow-up phone call from previous call". Below these, there are tabs for "Active Lead", "Appts (1)", and "MotoFactory". A row of icons represents various actions: Hot, Call, Email, Appt., Note, Lost, Bad, Sold, and Visit. The "Lead Info" section shows the lead is "Active", managed by "Alex Moore", created on "5/16/08 12:34p", from a "Newspaper (Walk-in)" source, and has been "Contacted: Yes". The "Vehicle Info" section lists a "2007 Ford Focus ST (New)" with stock number "71053", VIN "1FAHP38Z17W295111", engine "L4, 2.3L, DOHC", transmission "Manual 5 Speed", and color "Infra-Red Clearcoat". There are also sections for "Vehicle(s) of Interest" (with a click to add vehicles) and "Trade-in Info" (listing a "1999 AM General Hummer H1 Open Top" with an "\$8,000 value"). At the bottom, it shows the "Last Contact: Friday, May 16, 2008 2:02 PM (1 of 4)" and a "Desking Log" by "Davy Jones Watson". A yellow banner at the very bottom states "Retail/Purchase Deal Created".

Amending Customer Information

The screenshot shows a web application window titled "VinSolutions™" with a menu bar containing "Add", "Search", "Sold Log", "Distribution", and "My Settings". The main window is titled "Customer Information" and has tabs for "Customer", "Additional Information", "CoBuyer - Information", and "CoBuyer - Additional Information". The "Customer" tab is active, showing a form for editing customer information. The form is divided into two columns. The left column contains fields for "First Name" (Barry), "Last Name" (Bonds), "Suffix", "Company", "Address", "City", "State" (a dropdown menu), "Zipcode", and "Type" (Individual). The right column contains fields for "Title" (a dropdown menu), "Middle Name", "Nick Name", "Day Phone", "Eve Phone" ((888) 234-5678), "Cell Phone", "Fax", "Email" (roidrage@hotmail.com), "Alt Email", and "Preferred Contact" (a dropdown menu). Below these fields, there is a section titled "Other Information" with checkboxes for "Do Not Call", "Do Not Email", and "Do Not Mail", and fields for "Birth Day", "Anniversary", and "Gender" (a dropdown menu). At the bottom of the form, there is a URL: "http://www.vinsolutions.com/Pages/Global/GlobalCustomerEdit.aspx?source=customerpanel&GlobalCustomerID=1010113".

# CUSTOMER DASHBOARD

## Change Vehicle

The screenshot shows the 'Customer Dashboard' interface. On the left, the 'Vehicle Details' section for a 2007 Ford Focus ST is displayed, including its VIN (1FAHP38Z17W295111), stock number (71053), and various specifications like engine, transmission, and interior. A 'Change Vehicle?' link is present. Below this, the 'Pricing' section shows the Internet Price (\$21,385) and Lot Price (\$21,385). On the right, the 'Customer Info' section for Barry Bonds is shown, including his contact details and a 'Current Tasks' list with an appointment for Friday 5/16/08 at 2:00 PM. A 'Follow-up phone call from previous call' task is also listed. At the bottom right, the 'Vehicle Info' section repeats the vehicle details.

## Add additional vehicle of interest.

The screenshot shows the 'Add Vehicle of Interest' dialog box. It contains fields for Year (2008), Make (Chevrolet), Model (Uplander), Trim (LS), Trans (None), Doors (None), Engine (V6, 3.9L, SOHC, Turbo), Body Style (None), Interior Color (Medium Gray W/Base Cloth), and Exterior Color. The Stock # is 8D103501 and the VIN is 1GNDV23W68D103501. There are 'Select', 'Find...', and 'Decode' buttons. A 'Memo' field is also present. The dialog box has 'Save' and 'Cancel' buttons at the top right. The URL at the bottom is /CarDashboard/Pages/CRM/VehicleInterestEdit.aspx?AutoLeadID=1254687&AutoLeadVehicleInterestID=undefined.

## Switch Vehicle of Interest to Primary Vehicle.

The screenshot shows the 'Customer Dashboard' interface with the 'Vehicle(s) of Interest' section on the left. It lists the 2008 Chevrolet Uplander LS with its stock number (8D103501), VIN (1GNDV23W68D103501), engine (V6, 3.9L, SOHC, Turbo), and interior (Medium Gray W/Base Cloth Seat Trim). A 'Set as Primary' button and a 'delete' icon are next to the vehicle entry. The right side of the dashboard shows the same 'Customer Info' and 'Current Tasks' as the previous screenshot.

# CUSTOMER DASHBOARD

Capture Trade Information

VinSolutions™AddSearchSold LogDistributionMy Settings

Trade-In InformationSaveCancel

Trade-In 1Trade-In 2Trade-In 3

VIN: Decode

Print Form: Print

Year: 1999

Make: AM General

Model: Hummer H1

Trim: Open Top

Mileage:

Color: Beige

Interior: -- Select --

Engine:

Trans: -- Select --

Drive Line:

Condition: -- Select --

Trade Value: \$8,000.00

Payoff: \$1,000.00

Memo:

Delete Trade?

Forms drop down list

mailLeadsAddSearchSold LogDistributionMy SettingsSea

AddCustomer Dashboard

Customer Info

Barry Bonds

(Individual)

Eve: (888) 234-5678

Email: roidrage@hotmail.com

Active Lead

Appts (1)

HotCallEmailAppt.No

Lead Info

Status: Active

Sales Rep: Alex Moore

Created: 5/16/08 12:34p

Source: Newspaper (Walk-in)

Contacted: Yes

Forms

1 of 5 Generic Four Square

2 of 5 We Owe (Standard)

3 of 5 Generic Credit App

4 of 5 Gramm-Leach-Bailey

ballweg test 4

Borrowed Car

Classic Deal Jacket Test

Credit App

Deal Cover Sheet

Ford Credit App

Generic WorkSheet

GLB

GMAC

monterey test

Trade Evaluation










Vehicle(s) of Interest




# CUSTOMER DASHBOARD

Activity Icons

Active Lead   Apts (1)   MotoFactory



**Lead Info**  
Status: Active  
Sales Rep: Alex Moore  
Created: 5/16/08 12:34p  
Source: Newspaper (Walk-in)  
Contacted: Yes

**Vehicle Info**  
**2007 Ford Focus ST (New)**  
Stock #: 71053  
VIN: 1FAHP38Z17W295111  
Engine: L4, 2.3L, DOHC  
Trans: Manual 5 Speed  
Color: Infra-Red Clearcoat

**Co-Buyer Info**  
(none entered)

**Vehicle(s) of Interest**  
**2008 Chevrolet Uplander LS**  
Stock #: 8D103501  
VIN: 1GNDV23W68D103501


Call Button

CRM

Recent   Tasks   Calendar   Email   Leads   Add   Search   Sold Log   Distribution   My Settings

Log Phone Call   Save   Cancel

**Call Details**  
Call Type: ☐ Making Call ☐ Receiving Call   Script: -- Select --






 Click Here To Call

**Note**

**Next Steps**  
When do you want to call again?  
3 Days  
☒ Complete call task?  
☐ Create appointment?

**Customer Info**  
**Barry Bonds**  
(Individual)  
Eve: (888) 234-5678  
Email: roidrage@hotmail.com

Active Lead   Apts (1)

**Lead Info**  
Status: Active  
Sales Rep: Alex Moore  
Created: 5/16/08 12:34p  
Source: Newspaper (Walk-in)  
Contacted: Yes

# CUSTOMER DASHBOARD

## Email pop-up

The screenshot shows a 'Send Email' dialog box within a Windows Internet Explorer browser window. The browser's address bar displays the URL: `http://apps.vinmanager.com/CarDashboard/pages/leadmanagement/sendemail.aspx?AutoLeadID=1254687`. The dialog box has a title bar that says 'Send Email' and buttons for 'Send' and 'Cancel'. Inside the dialog, the 'From' field is populated with 'alexmoore@test.vinleads.com'. The 'To' field contains 'Roidrage@hotmail.com', with links for 'CC', 'BCC', and 'Attach' next to it. There are buttons for 'Send VinBrochure' and 'Insert Vehicles'. The 'Subject' field is empty. Below these fields is a rich text editor with a toolbar containing various formatting options (bold, italic, underline, etc.) and a 'Zoom' dropdown. The text area of the editor contains the text 'Do what I say!!!!'. At the bottom of the dialog, there is a checkbox labeled 'Highlight Auto Fields' which is checked.

## Appointment

The screenshot shows the 'Create Appointment' form within the VinStickers Lead Management system. The form has a title bar with 'Create Appointment' and buttons for 'Save' and 'Cancel'. The 'Type' section has radio buttons for 'Meeting' (selected), 'Phone Call', 'Email', 'Letter', 'Fax', and 'Other'. The 'Appt time' field is set to '5/16/2008 4:00 PM'. The 'Description' field is empty. The 'Notes' field is a large text area. On the right side of the form, there is a 'Customer Dashboard' sidebar. The 'Customer Info' section shows 'Barry Bonds (Individual)' with contact information: 'Eve: (888) 234-5678' and 'Email: roidrage@hotmail.com'. Below this, the 'Lead Info' section shows 'Status: Active', 'Sales Rep: Alex Moore', 'Created: 5/16/08 12:34p', 'Source: Newspaper (Walk-in)', and 'Contacted: Yes'. The sidebar also has tabs for 'Active Lead' and 'Appts (1)'.

When creating an appointment, a description is REQUIRED.

# CUSTOMER DASHBOARD

## Notes

CRM

RecentTasksCalendarEmailLeadsAddSearchSold LogDistributionMy Settings

Add NoteSaveCancel

Note Type:  
☒ General Note  
☐ Meeting Note  
☐ Test Drive

Note:

Customer Dashboard

Customer Info

Barry Bonds  
(Individual)  
Eve: (888) 234-5678  
Email: roidrage@hotmail.com

Active LeadAppts (1)

HotCallEmailAppt.Note

Lead Info

Status: Active  
Sales Rep: Alex Moore  
Created: 5/16/08 12:34p  
Source: Newspaper (Walk-in)  
Contacted: Yes

Co-Buyer Info

(none entered)

## Lost

CRM

RecentTasksCalendarEmailLeadsAddSearchSold LogDistributionMy Settings

Lost ProspectSaveCancel

Reason: Purchased from private party

Note:

Customer Dashboard

Customer Info

Barry Bonds  
(Individual)  
Eve: (888) 234-5678  
Email: roidrage@hotmail.com

Active LeadAppts (1)

HotCallEmailAppt.Note

Lead Info

Status: Active  
Sales Rep: Alex Moore  
Created: 5/16/08 12:34p

# CUSTOMER DASHBOARD

## Bad Leads

CRM

Recent Tasks Calendar Email Leads Add Search Sold Log Distribution My Settings

**Bad Lead** Save Cancel

Reason: -- Select --

Note:

**Customer Dashboard** Forms

**Customer Info**  
Barry Bonds  
(Individual)  
Eve: (888) 234-5678  
Email: roidrage@hotmail.com

**Current Tasks**  
Appt (Friday 5/16/08 2:00 PM)  
Description: He's Hitting a Home Run For Us

**Lead Info**  
Status: Active  
Sales Rep: Alex Moore  
Created: 5/16/08 12:34p  
Source: Newspaper (Walk-in)  
Contacted: Yes

Active Lead Appts (1) MotoF

Hot Call Email Appt. Note Lost

## Visit Button

Sold Log Distribution My Settings Search:

Save Cancel Customer Dashboard Forms

**Customer Info**  
Barry Bonds  
(Individual)  
Eve: (888) 234-5678  
Email: roidrage@hotmail.com

**Current Tasks**  
Appt (Friday 5/16/08 2:00 PM)  
Description: He's Hitting a Home Run For Us

**Lead Info**  
Status: Active  
Sales Rep: Alex Moore  
Created: 5/16/08 12:34p  
Source: Newspaper (Walk-in)  
Contacted: Yes

**Co-Buyer Info**  
(none entered)

**Vehicle Info**  
2007 Ford Focus ST (New)  
Stock #: 71053  
VIN: 1FAHP38Z17W295111  
Engine: L4, 2.3L, DOHC  
Trans: Manual 5 Speed  
Color: Infra-Red Clearcoat

**Vehicle(s) of Interest**  
2008 Chevrolet Uplander LS  
Stock #: 8D103501  
VIN: 1GNDV23W68D103501  
Engine: V6 3.0L SOHC Turbo

Active Lead Appts (1) MotoFactory

Hot Call Email Appt. Note Lost Bad Sold Visit

## BE BACK

Active Lead Appts (1) MotoFactory

Hot Call Email Appt. Note Lost Bad Sold Be Back

**Lead Info**  
Status: Active  
Sales Rep: Alex Moore  
Created: 5/16/08 12:34p

**Vehicle Info**  
2007 Ford Focus ST (New)  
Stock #: 71053  
VIN: 1FAHP38Z17W295111  
Engine: L4 2.3L DOHC

# SEARCH OPTIONS

Quick Search (customer and inventory)

The screenshot shows the 'Quick Search' interface for a CRM system. The header includes the 'motosnap' logo and the user 'Alex Moore'. A search bar at the top right allows searching for 'Inventory' or 'Customers', with 'Customers' selected and the text 'Search: Berry' entered. The main navigation bar includes links for CRM, Recent, Tasks, Calendar, Email, Leads, Add, Search, Sold Log, Distribution, and My Settings. The 'My Tasks (11)' section shows a list of tasks with columns for Customer, Hot, Source, Updated, and Age. The 'New Leads (1)' section shows a list of leads with columns for Customer, Hot, Source, Updated, and Age. The 'My Dashboard' section shows a notification 'You have 2 customer alert(s)' and a 'My Sales Goals' section with the text 'No sales goals configured'.

Customer	Hot	Source	Updated	Age
<a href="#">Whooper JR</a>		VS WebSite	11/12/06 7:52p	550

Customer	Hot	Source	Updated	Age
<a href="#">2005 Audi A4 [A20543]</a>		VS WebSite	11/12/06 7:52p	550

Advanced Search

The screenshot shows the 'Advanced Search' interface for a CRM system. The header includes the 'CRM' logo and the user 'Alex Moore'. The main navigation bar includes links for Recent, Tasks, Calendar, Email, Leads, Add, Search, Sold Log, Distribution, and My Settings. The 'Advanced Search (12)' section is active. It contains several search criteria sections: 'Customer' with fields for First name, Last name, Email, and Phone; 'Lead/Opportunity (Click Here to Collapse)' with fields for Received, From, To, Source, Status, and Sales Rep; and 'Vehicle (Click Here to Collapse)' with fields for VIN or Stock #, Year From, Year To, Type, Make, and Model. A 'Search' button is located below the search criteria. The results table shows a list of leads with columns for Sales Rep, Customer, Status, Source, and Created.

Sales Rep	Customer	Status	Source	Created
A Moore	<a href="#">Whooper JR</a>	Active	(VS WebSite)	11/12/06
A Moore	<a href="#">George Bush</a>	Active	(Newspaper)	5/2/08

Search Results

CRM

Recent

Tasks

Calendar

Email

Leads

Add

Search

Sold Log

Distribution

My Settings

Advanced Search (1)

Customer

First name: Barry

Email:

Last name:

Phone:

Lead/Opportunity (Click Here to Collapse)

Received

From:

To:

Source: -- All --

Status: -- All --

Sales Rep: Alex Moore

☐ Only Hot Opportunities

Vehicle (Click Here to Collapse)

VIN or Stock #:

\* = VIN Wildcard

Year From: All

To: All

Type: -- All --

Make: All Makes

Model: All Models

Search

Sales Rep	Customer	Status	Source	Created
A Moore	<a href="#">Barry Bonds</a> 2007 Ford Focus [71053]	Active (Newspaper)		5/16/08

# SALESPERSON ACKNOWLEDGEMENT

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

Initial Here

\_\_\_\_ SALESPERSON'S TASK LIST

\_\_\_\_ HOW TO ADD A CUSTOMER

\_\_\_\_ UTILIZE THE CUSTOMER DASHBOARD

\_\_\_\_ SEARCH FOR A CUSTOMER OR VEHICLE

Signed this \_\_\_\_ day of \_\_\_\_\_, 2008

\_\_\_\_\_

TRAINER: \_\_\_\_\_