ADMIN MANUAL

MOTOSNAP
POWERED BY
VINSOLUTIONS.COM

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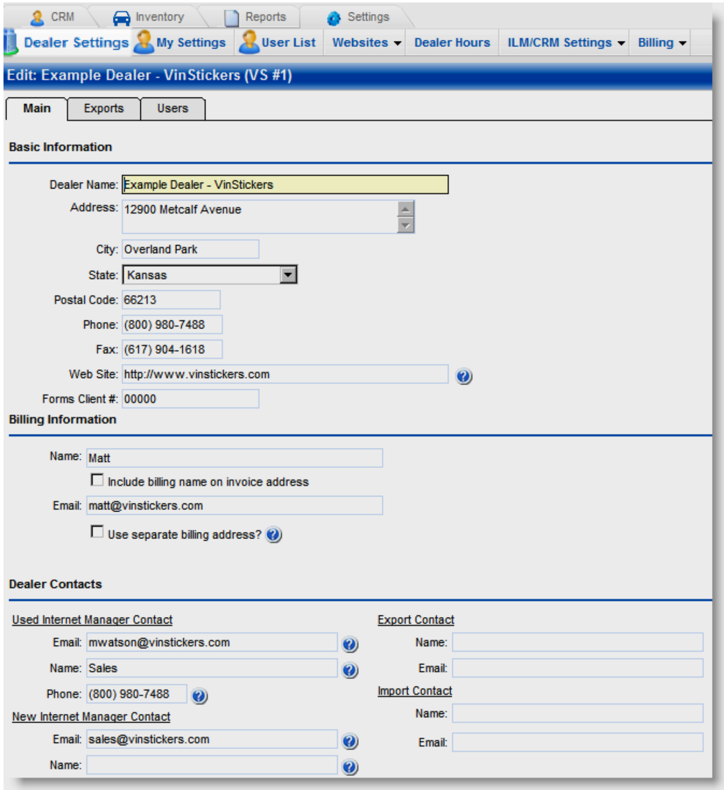
INFORMATION COVERED

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

Dealer Settings

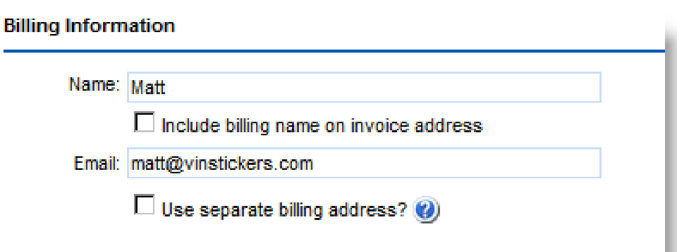


The DEALER SETTINGS are where name, address, phone numbers, billing information, inventory settings, leads address, and dealer contacts are found and verified.

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. 

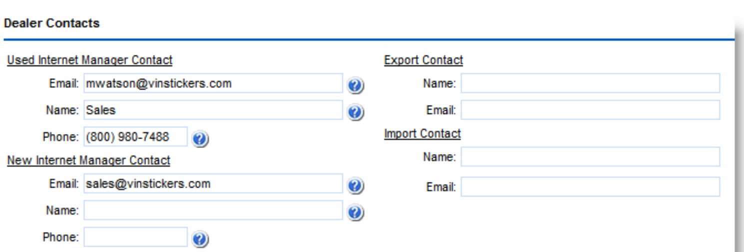
Any time the save button is available make sure to click save or the information is lost.

Billing Information

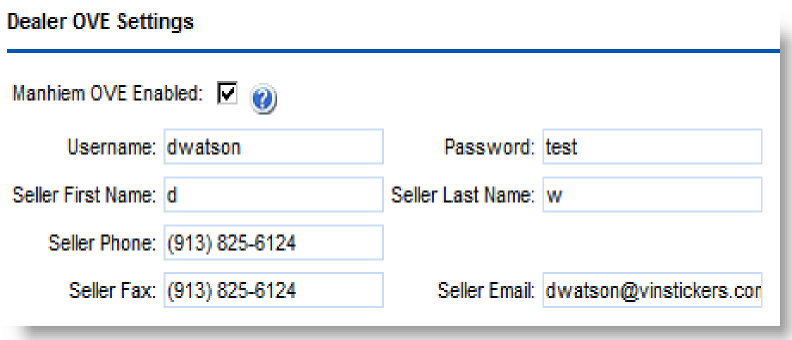


The BILLING INFORMATION houses the name and e-mail address of the accounts receivable contact.

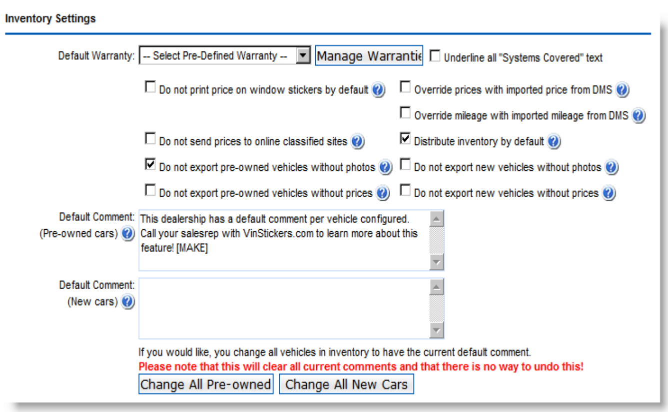
Dealer Contacts



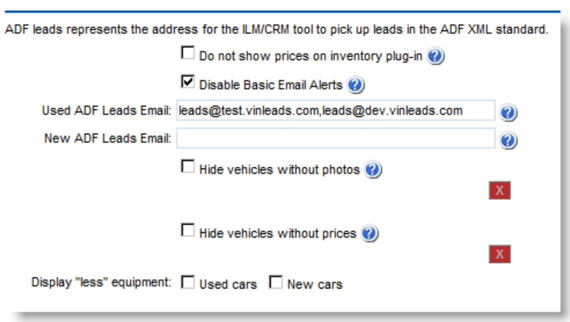
The DEALER CONTACT area houses the internet director's contact information and any persons responsible for inventory exports and imports.



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.

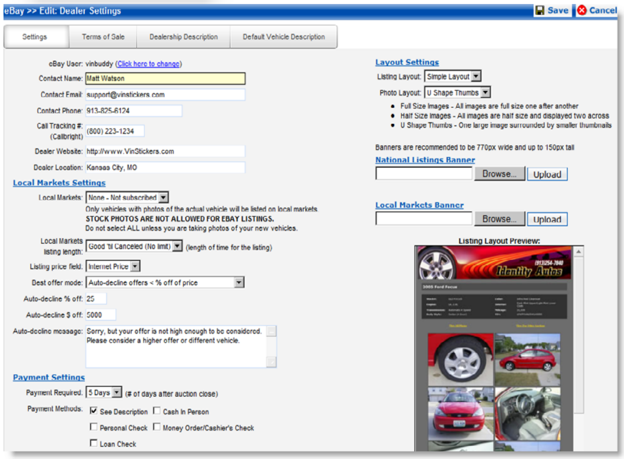


INVENTORY SETTINGS is where you manage the prices, comments, printing, and photos for the dealership's inventory. The default comments can be quickly reset for all vehicles in the inventory.

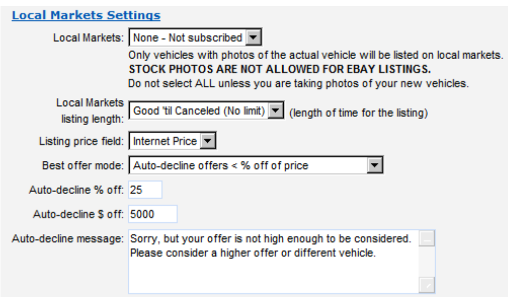


The INVENTORY GALLERY SETTINGS controls where all the leads are filtered to. This area shows the leads address for all ADF/XML formatted leads. The non-ADF/XML leads will require a separate address. In this area check boxes are available for hiding the vehicles with out photos or prices. Also check boxes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

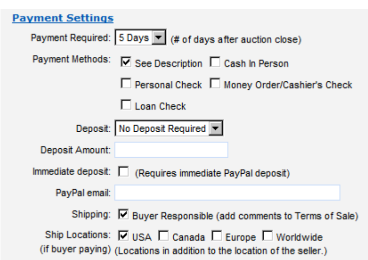
eBay Settings



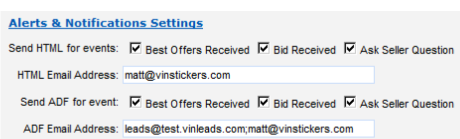
From the main tab of the Dealer Settings area the EBAY MOTORS SETTINGS can be controlled. By Clicking on the eBay Settings a pop up window appears. Here the user ID, contact information, and dealer information is set.



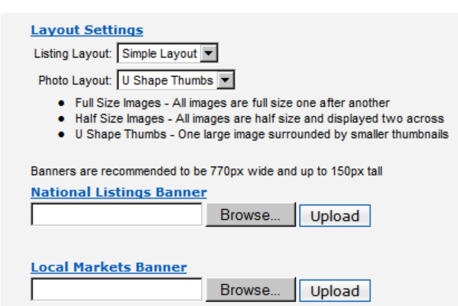
The LOCAL MARKETS SETTINGS is for those who wish to only list inventory in their immediate area.



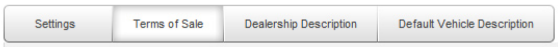
The PAYMENT SETTINGS control when and how the dealership will receive payment for sold eBay items.



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



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.

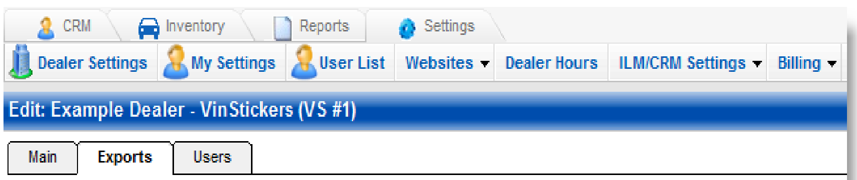


The Terms of Sale allows the dealership to describe the deposit, payment, taxes, inspection, shipping, and warranty information to the customer.

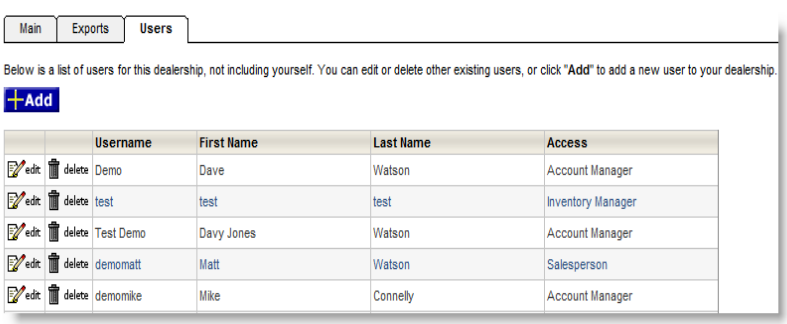
The Dealership Description area allows for a brief description of the dealership.

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.

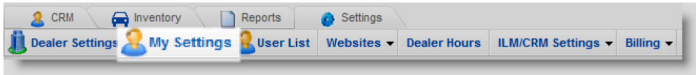

Main | Exports | Users

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.

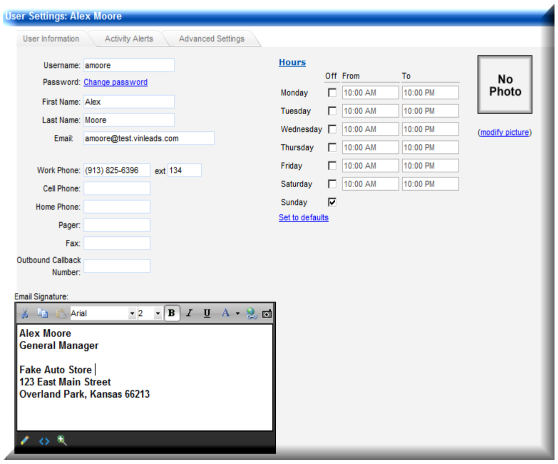
+Add

		Username	First Name	Last Name	Access
edit	delete	Demo	Dave	Watson	Account Manager
edit	delete	test	test	test	Inventory Manager
edit	delete	Test Demo	Davy Jones	Watson	Account Manager
edit	delete	demomatt	Matt	Watson	Salesperson
edit	delete	demomike	Mike	Connelly	Account Manager

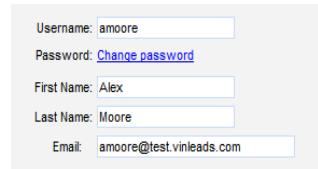
The Users tab of the Dealer Settings area is available for deletion of users only after all customers have been resigned.

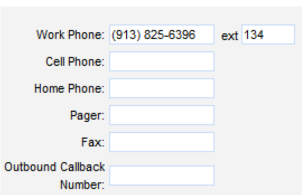


The My Settings area allows a user to modify his or her personal information. This contact information is used by the system for the auto fill fields and the lead assignment controls.

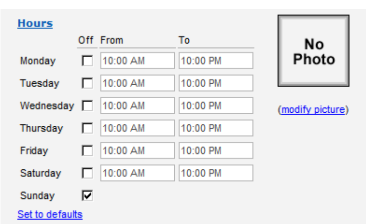


The user name can not be changed. The password can be reset. The password must be at least 7 characters long containing at least 1 capital letter and at least 1 number.





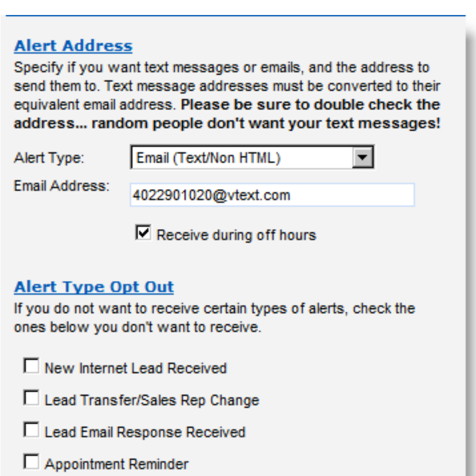
The phone numbers and e-mail address are used by the auto fill fields and for the managers when they are looking for a salesman's personal information.



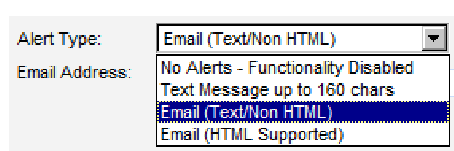
The Hours of operation are just for the particular user being edited. This information controls when the activity alerts will fire, when leads are received, and will be listed on the Vin-Supported web site.

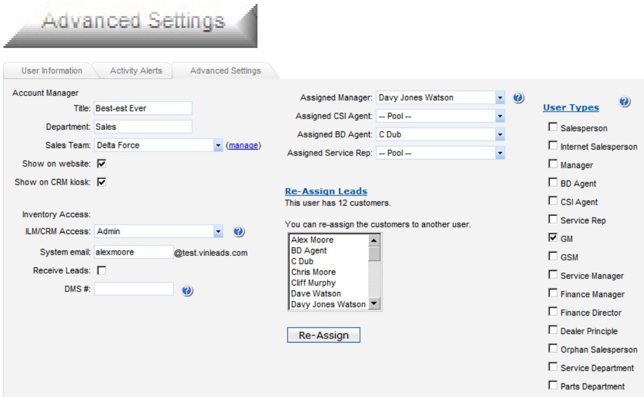
The Photo area is for a photograph of the user. This can be shown on the Vin-Supported web site, kiosk, and the e-mail signature.

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.

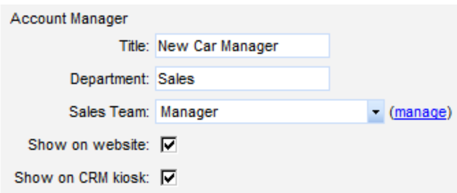


The Alert Address is set up as no alerts, text messages, e-mail with HTML or e-mail with out HTML. Alerts can be opted out of if the user does not want to receive certain kinds of alerts. The common carrier codes are listed on the right hand side of the activity alerts screen.

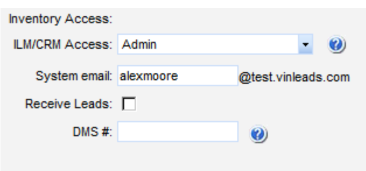




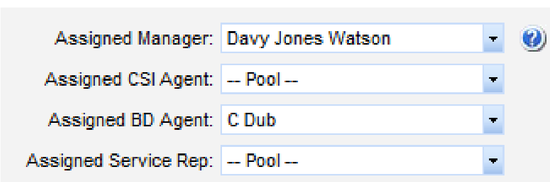
The ADVANCED SETTINGS area houses most of the user's access levels and dealership roles.



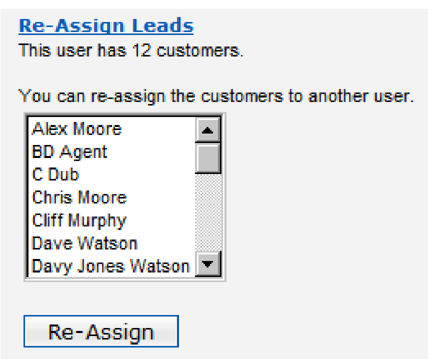
The ACCOUNT MANAGER section covers the user's title, department, group or team. The check boxes indicate wither a user will appear on the Vin-Supported web site and the kiosk.



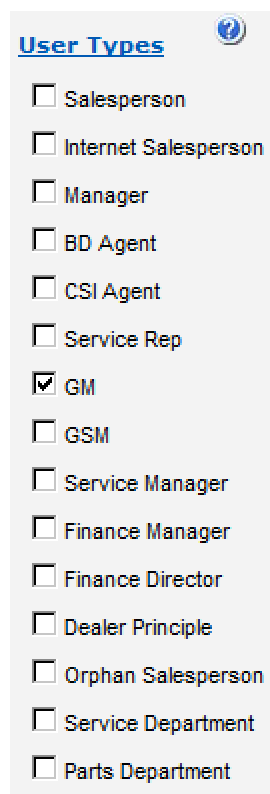
The ACCESS area allows the user to use the MotoSnap software. There are two accesses. One is for the inventory and one is for the ILM/CRM itself. The system email can be changed and is the address that is registered to that user in the VinSolutions software. Check marking the receives leads box allows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



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.



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



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
Group: BDC					
edit	BD Agent (bdagent) bdagent@test.vinleads.com		Account Manager		Manager (view as) BD Agent
Group: Demo Accounts					
edit	Dave Watson (Demo) demo@test.vinleads.com		Account Manager		Manager (view as) CSI Agent
edit	Davy Jones Watson (Test Demo) frankly@test.vinleads.com		Account Manager	Yes	Manager (view as) Manager
edit	Matt Watson (demomatt) matt@test.vinleads.com	1	Salesperson	Yes	User (view as)
edit	Mike Connelly (demomike) mike@test.vinleads.com		Account Manager	Yes	Admin (view as) Manager

Group: Manager	
edit	Alex Moore (amoore) alexmoore@test.vinleads.com
edit	C Dub (cdub) cdubdub@test.vinleads.com
edit	Chris Moore (cmoore1) cmoore@test.vinleads.com
edit	test test (test) testemailaddress@test.vinleads.com
edit	Tom Stromboli (tstromboli) stamasi@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

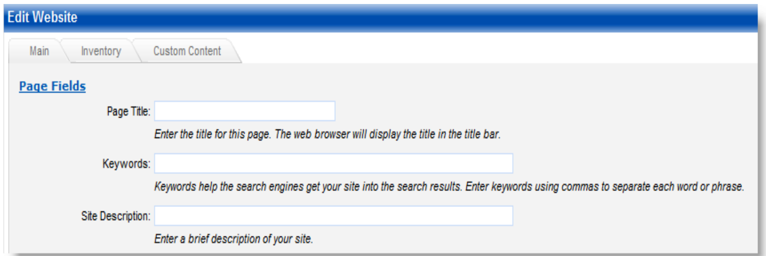
The Last Login shows last known login time. For detailed information on previous logins check the bottom of the page for Recent Logins. Recent Logins

Add

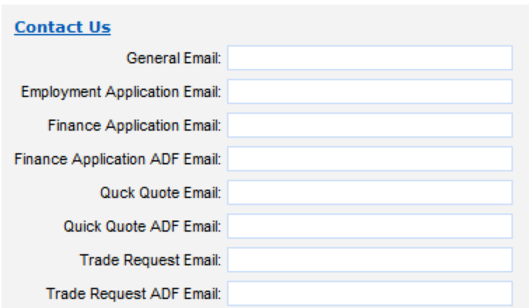
The Add button allows an admin to add a new employee to the system. The screens are navigated the same as My Settings. See the My Settings area for detailed information.

Edit Website

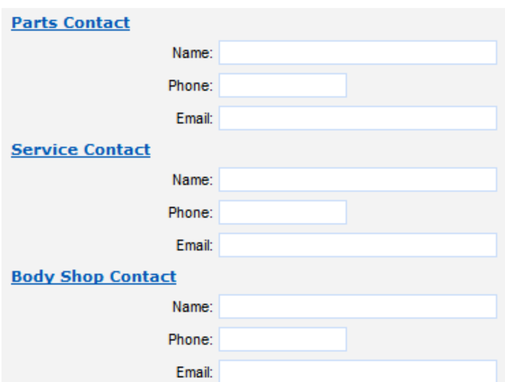
Under the settings and website tab there is a location to edit a VinSolutions supported website. The main area tab houses webpage fields, contact us information, parts, body shop, and service contacts.



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

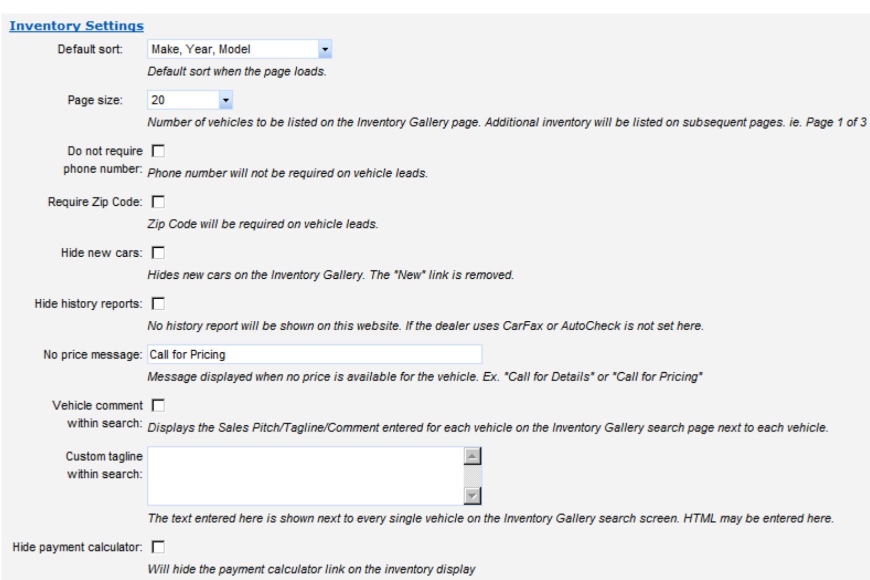


The Contact Us area house the general contact emails for the dealership. All correspondence from the website can be filtered to different e-mail addresses.

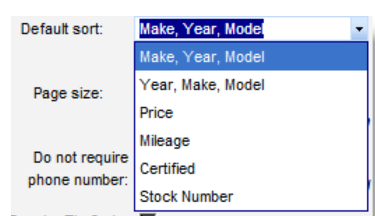


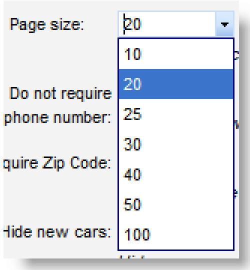
The Parts, Service, and Body Shop Contacts can be set to receive related inquiries from the dealer's VinSolutions supported website.

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



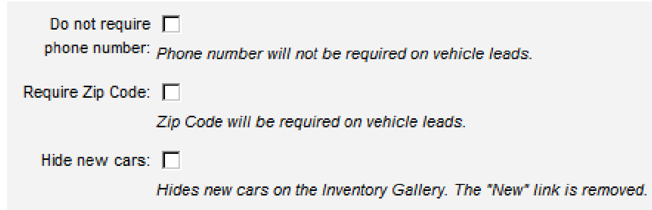
The Inventory Settings starts with the default sort of the vehicles when they are listed on the site.

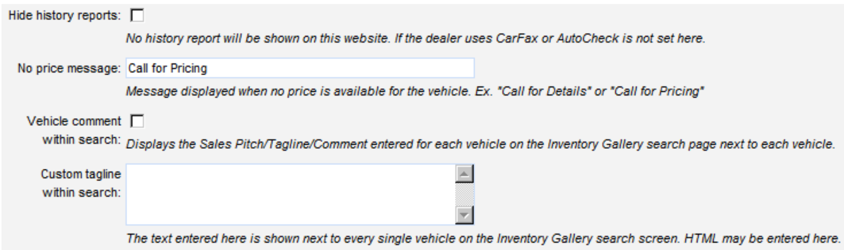




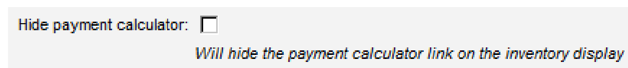
Page Size designates how many vehicles can be displayed on one page.

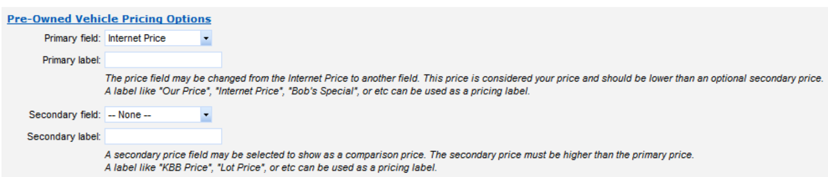
Next decide what is required for a lead to be submitted.



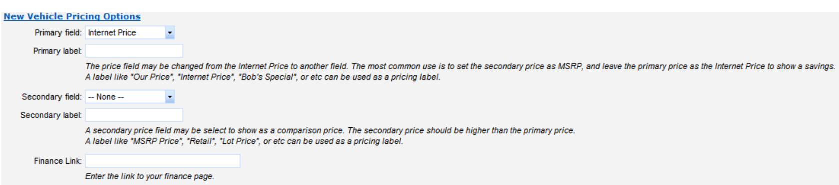


Check boxes are available to hide newly listed vehicles, car fax information, and vehicle comments. Set the message if there is no price listed and set any custom tagline. The option is available to hide the payment calculator.

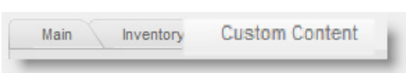




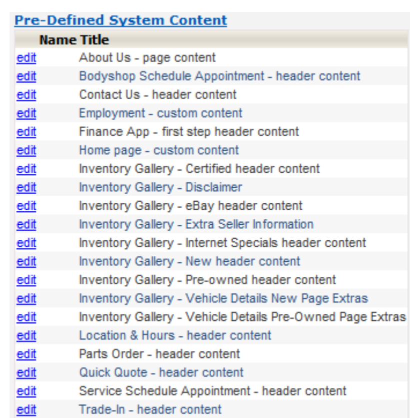
The Pre-Owned Vehicle Pricing Options allows a user to set the primary field for main price and a secondary field for a secondary price for the used vehicles.



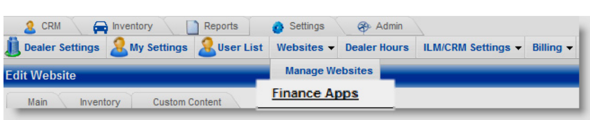
The New Vehicle Pricing Options allows a user to set the set the primary and secondary pricing fields for new vehicles. The finance link will link the customer to the existing finance page.



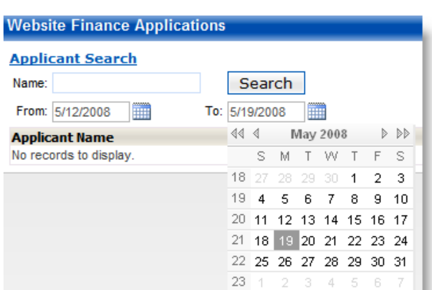
The Custom Content tab allows the user to set the content for each page the customer navigates to.



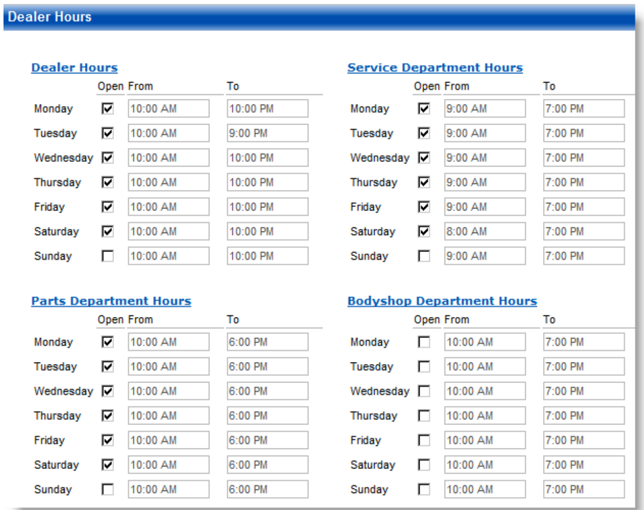
Make sure to click the save button any time it appears.



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



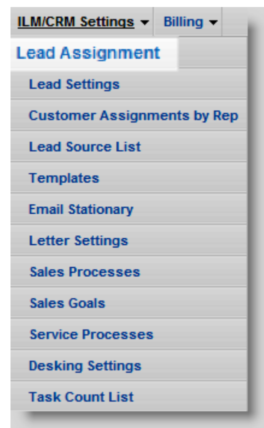
The Finance Applications can be sorted by the name or date submitted.

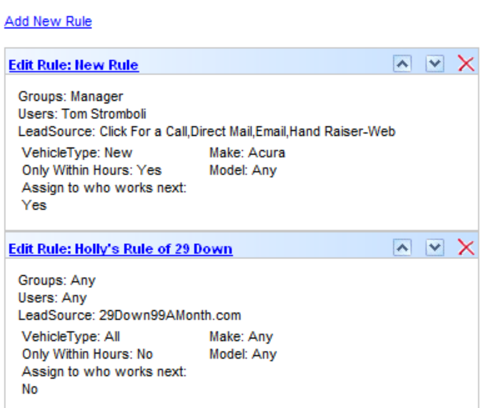


Dealer Hours are found under the main Settings tab and under the Dealer Hours sub-tab. This is where the dealership hours are set. They will be displayed on the VinSolutions supported website. Internet response times are in part based off the showroom hours.

Make sure to save when finished modifying any information.

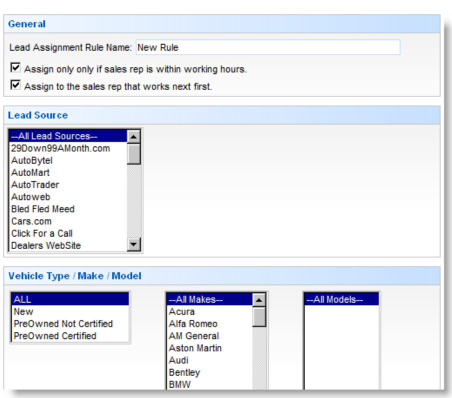
ILM/CRM Settings are the center of the MotoSnap software. Here dealers can control lead assignment, lead settings, customer assignments, lead sources, templates, email stationery, letter settings, sales processes, sales goals, service processes, desking settings, and over due tasks.



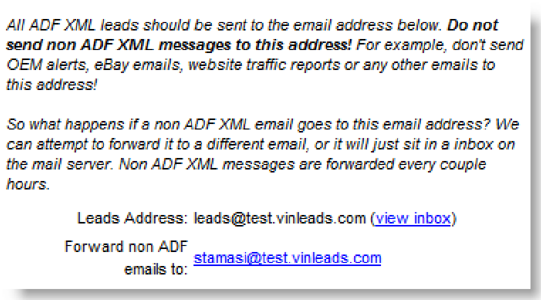


The Lead Assignment Rules are used to filter who gets which internet leads. These rules are set and sorted by the use of cascade style filters. Meaning that the leads enter the filter system at the top of the list and are passed down through the list until a match is found.

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

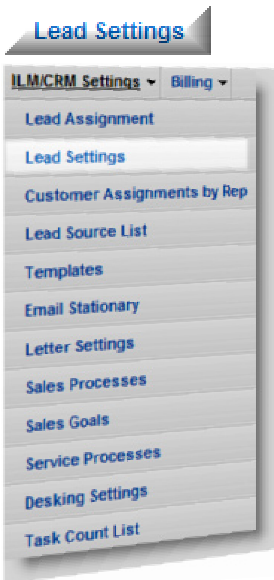


the vehicle type, and or the user / group. Check boxes allow the dealer to control who receives leads based upon working hours.

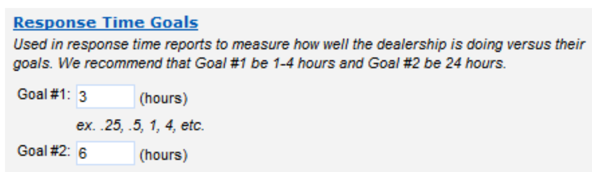


The leads that come in to MotoSnap must be in ADF/XML format. In the even that the leads are not formatted correctly they maybe directed to an alternate e-mail. That e-mail address is set at the bottom of the lead assignment page.

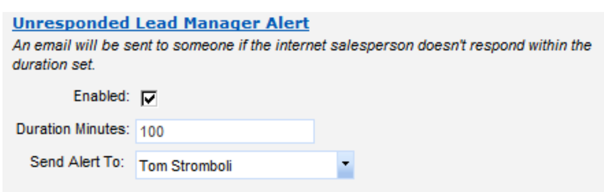
When finished modifying information in the leads assignment area click save. Be advised that any changes to this area of the system are immediate and can monumentally affect the quality of the customer's experience with the internet department. These rules should be well thought out prior to any implementations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



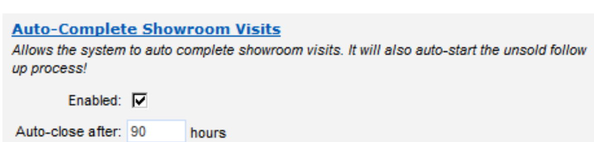
The Lead Settings screens are designed to give the user control over a myriad of tools from the response time goals to the return on investment settings.



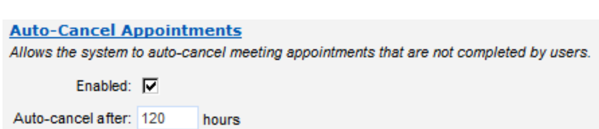
The Response Time Goals control the internet response time pie that is shown on the dashboard. These are the times that the salesmen will try to meet. When setting the response times the smaller number must always be goal number one and the larger number must be goal number two.



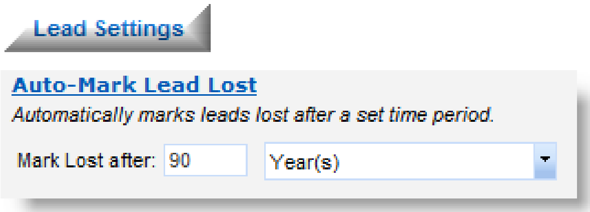
The Un-Responded Lead Manager Alert is designed to send a manager an alert if an internet lead is left unattended for the time set in the "Duration Minutes" area. When this is enabled managers can keep an eye on the internet department with out having to login and view the response times.



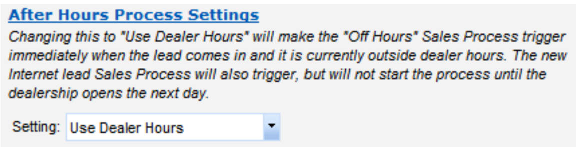
The Auto-Complete Showroom Visits section when enabled is designed to end visits from the showroom floor after a predefined amount of time. Be advised that all auto completed showroom visits will be marked as "Unsold." That is to say that the customers will immediately begin to receive unsold showroom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



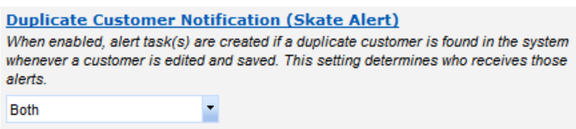
Auto-Cancel Appointments section when enabled will mark an appointment not completed after a set amount of time.



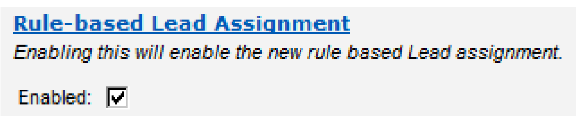
The next section is Auto-Mark Leads Lost. This section is designed to mark a lead lost after an allotted time frame. Be advised that the leads will be changed from active status to a lost status and therefore will receive the lost customer follow-up.



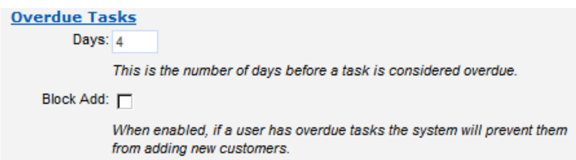
The After Hours Process Settings is optional follow-up for internet leads submitted after the dealership is closed.



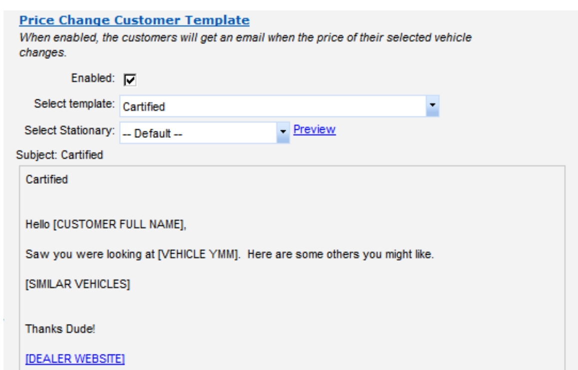
The Duplicate Customer Notification (Skate Alert) is to alert the manager or salesman or both of possible duplicate customer information.



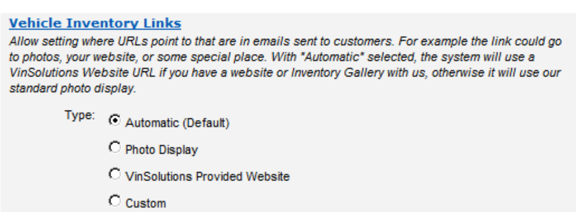
Rule-Based Lead Assignment is enabled to allow for custom lead rules to be set from the lead assignment tab.



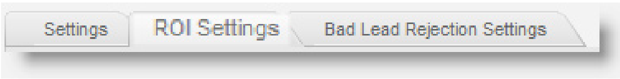
Overdue Tasks area sets the number of days before an assigned task is considered overdue. The Block Add area when enabled will prohibit a salesman from adding a new customer to the system when they have overdue tasks.



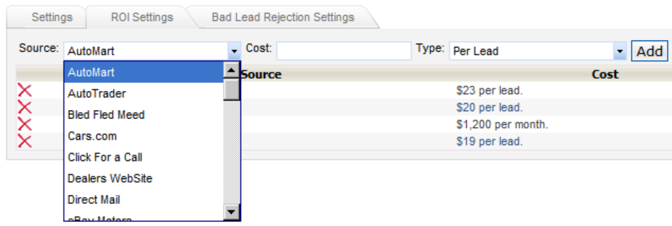
Price Change Customer Template is used to alert the customers when the price is changed on a vehicle that they are interested in. By enabling this feature the customer automatically receives an email when inventory prices are changed.



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.



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.

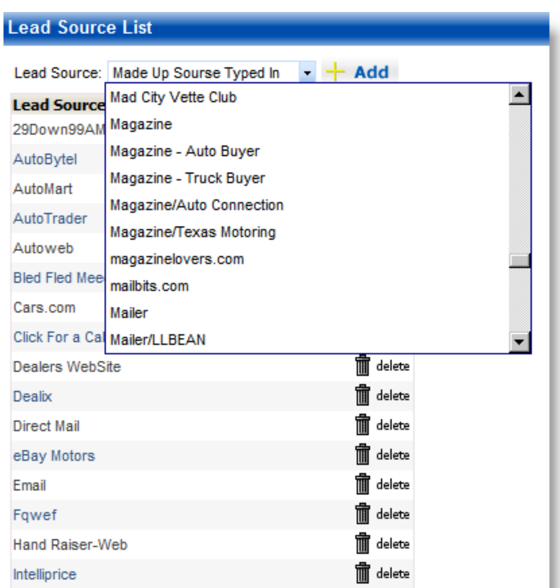
Customer Assignments by Rep

Unassigned Customers

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

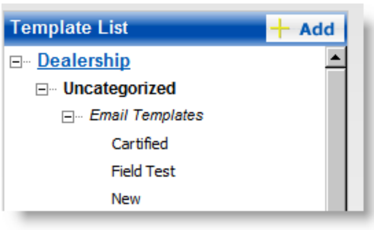
The Customer Assignments by Rep section is found under the Settings tab and ILM/CRM Settings sub-tab. The purpose of this area is to allow the administrator to reassign any customers from salesmen or orphan sales to other users.

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.

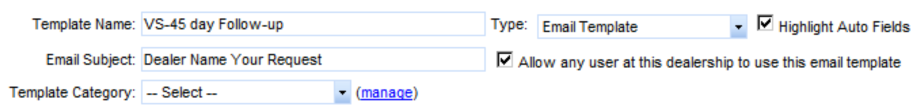
Templates



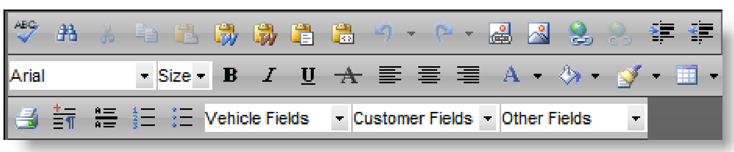
Templates can be viewed by everyone but can only be created and edited only by administrated.

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 planed 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.

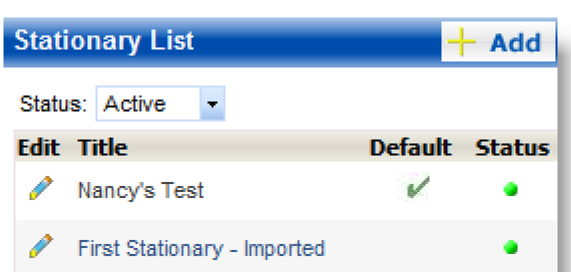


The template must have a name, type, and subject (if it is an e-mail). Categories are optional but make the template easy to find in the list. Check boxes allow the user to control the viewing of auto fill fields and if other users in the system can use the template.



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.

Email Stationary

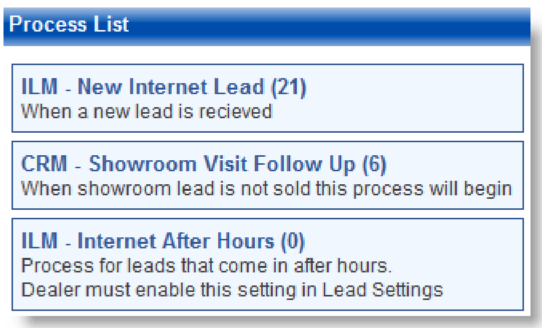


The Stationery List houses all the different E-mail Stationeries available to the dealer. To edit them click on the pencil icon.

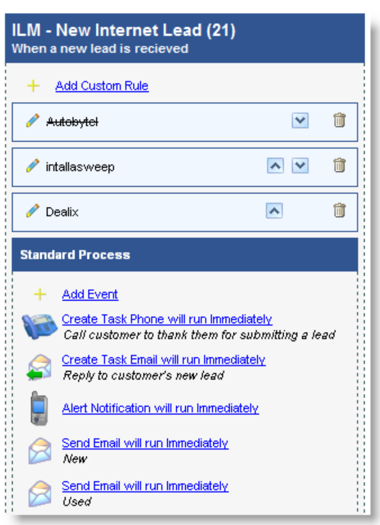
Letter Settings

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

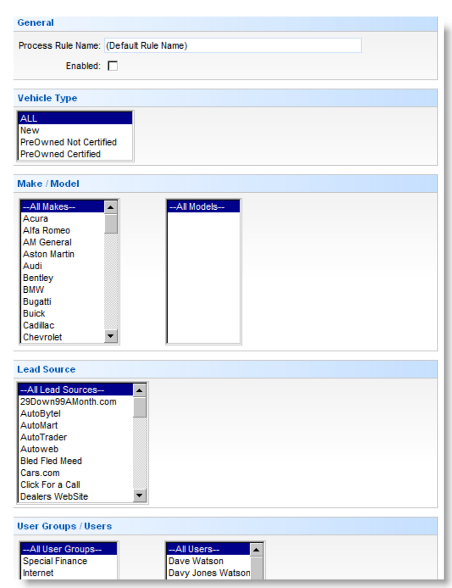
Sales Processes

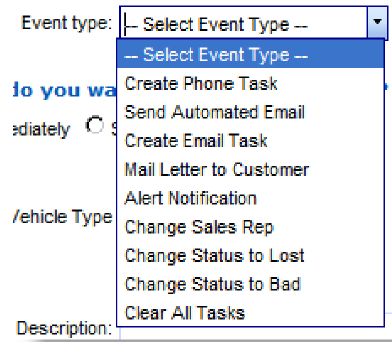


The Sales Processes are by far the most customizable feature of the VinSolutions software service and easily the most confusing. For this reason free training is available please contact VinSolutions for information on this free training. Make sure that all changes and modifications are well planed and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

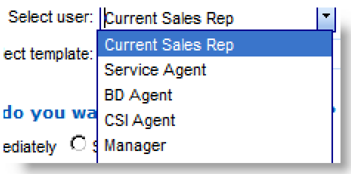


The first process on the list is for a New Internet Lead. When expanded this area reviles all rules and processes in the category. Add Custom Rule appears above the existing rules. When creating a custom rule the filters can be set based on vehicle, lead source, or user/group. Be advised, the rule must 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.

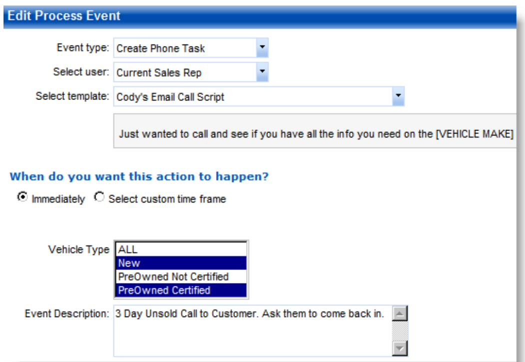




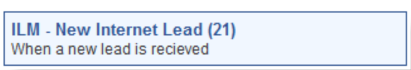
To add an event to the sale process, first determine where in the buy experience the event should take place. Then click the add event button. Chose from the drop down list what activity is to fire. Determine from whom the task is coming or if it is a manual task, such as making a phone call who should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



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.



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.



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.

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.

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.

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

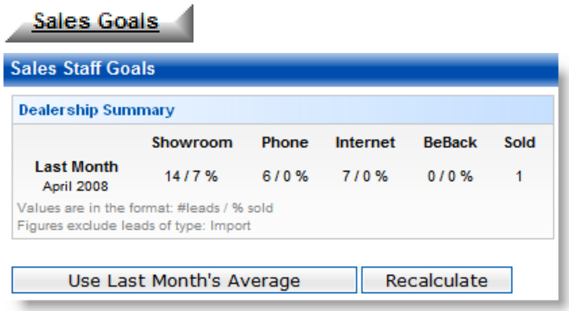
The Appointment Reminder process will fire before the date and time of a customer's appointment.

ILM - New Service Lead (0)
When a new service lead is received

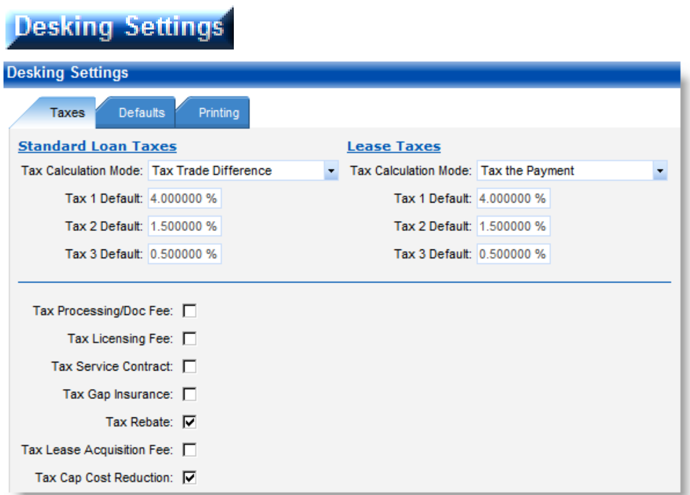
The New Service Lead is a process for internet submitted service leads.

ILM - New Parts Order Lead (0)
When a new parts order is received

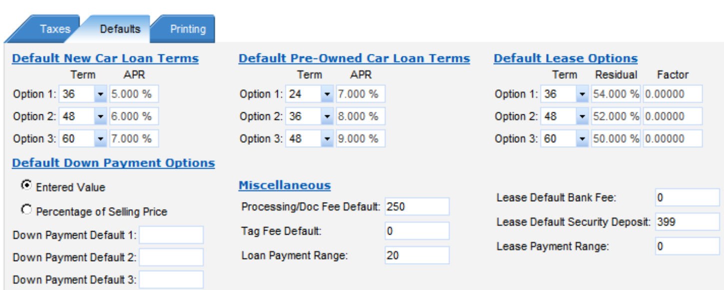
The New Parts Order Lead applies to only to internet submitted parts order leads.



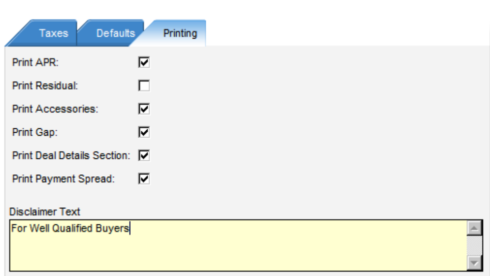
Sales goal allow salesmen to have a visual on what it takes to sell a certain number of vehicles in a month. Set the goals by clicking the "Use Last Month's Average" and the system will figure everyone's goals based off what they did last month. To make it more challenging adding to the number of ups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



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.

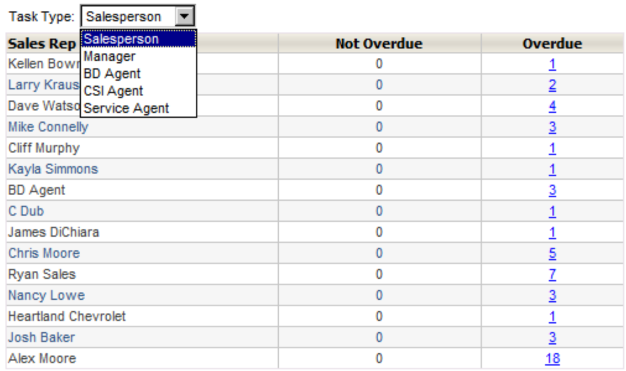


The Defaults area allows the dealer to set the term, APR, tag fee, and down payments.



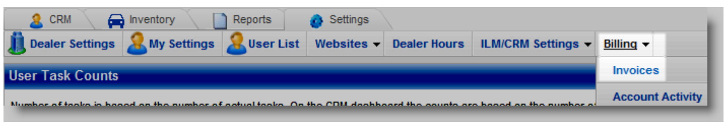
The printing section allows dealers to control what information is printed and given to the customer.

User Task Counts

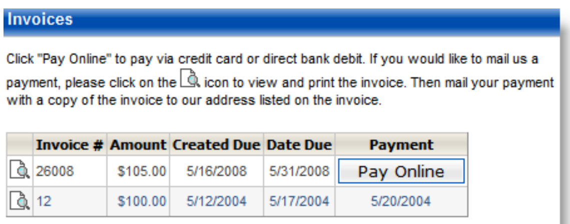


Sales Rep	Not Overdue	Overdue
Kellen Bowr	0	1
Larry Kraus	0	2
Dave Watso	0	4
Mike Connelly	0	3
Cliff Murphy	0	1
Kayla Simmons	0	1
BD Agent	0	3
C Dub	0	1
James DiChiara	0	1
Chris Moore	0	5
Ryan Sales	0	7
Nancy Lowe	0	3
Heartland Chevrolet	0	1
Josh Baker	0	3
Alex Moore	0	18

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.

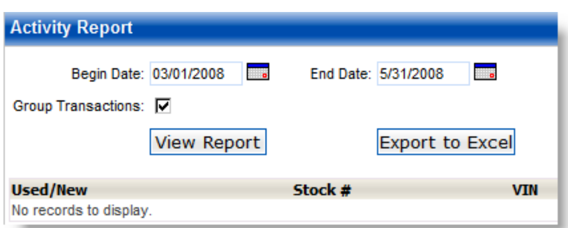


Invoices

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	Pay Online
	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.



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