Dealer Intelligence (DI)

For Managers

SEPT 2012

SET UP & QUICK REFERENCE GUIDE

DI Set Up and Reference Guide for Managers

GETTING STARTED WITH DEALER INTELLIGENCE

Authorized customers who have a current support agreement with Movidia Intelligence are given a web page address with a valid user name and password.

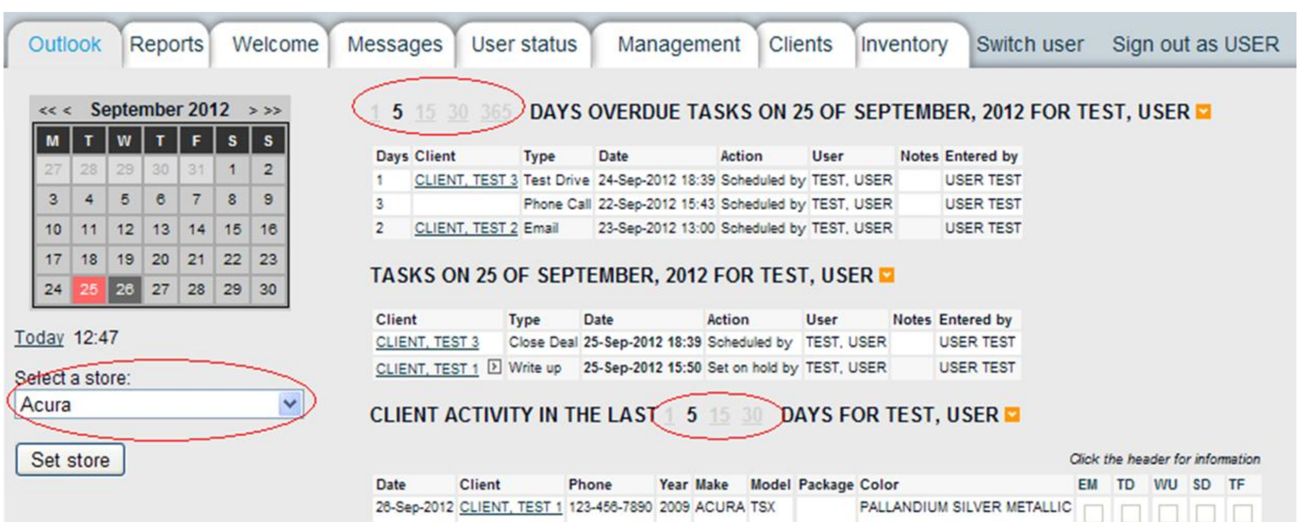
✓ Navigate to the webpage and Log In.

- Upon login, users are directed to the Outlook page.

Outlook Home Screen

✓ View Outlook

- The Outlook index page will display a summary of your current and overdue tasks, as well as client Activities.
- Change the day and range of days displayed by selecting a **date** on the web calendar and by selecting one of the **Days** options.
- View your tasks and activities from different store locations by using the "select a store" drop down menu.

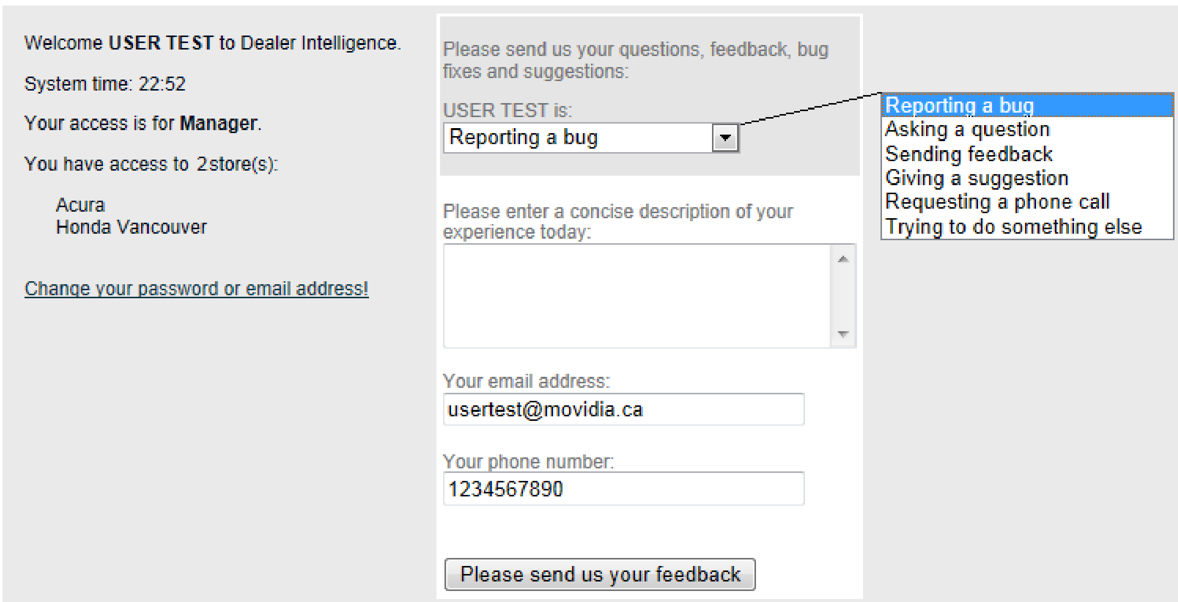


*Users can choose to show tasks and activities for 1, **5**, 15, 30, or 365 days.

Welcome to DI

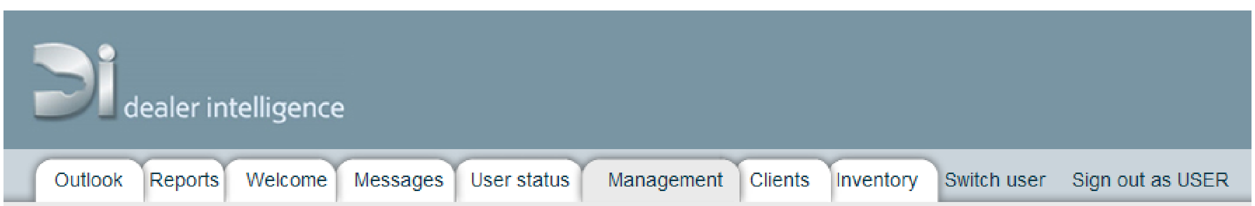
✓ Navigate to the Welcome page by clicking on the “Welcome” tab.

- Your access user type and security credentials are listed on this page.
- Use this page to report issues, ask questions, or provide feedback and suggestions.



*Feedback is important to us as it helps improve the quality and user experience of our product. Use this page to help us to serve you better and enhance our product.

Navigating DI



✓ Top Menu Tabs

- The top menu tabs allow users to navigate between the main sections of DI.
- Switching users and signing out options are also available from this menu.

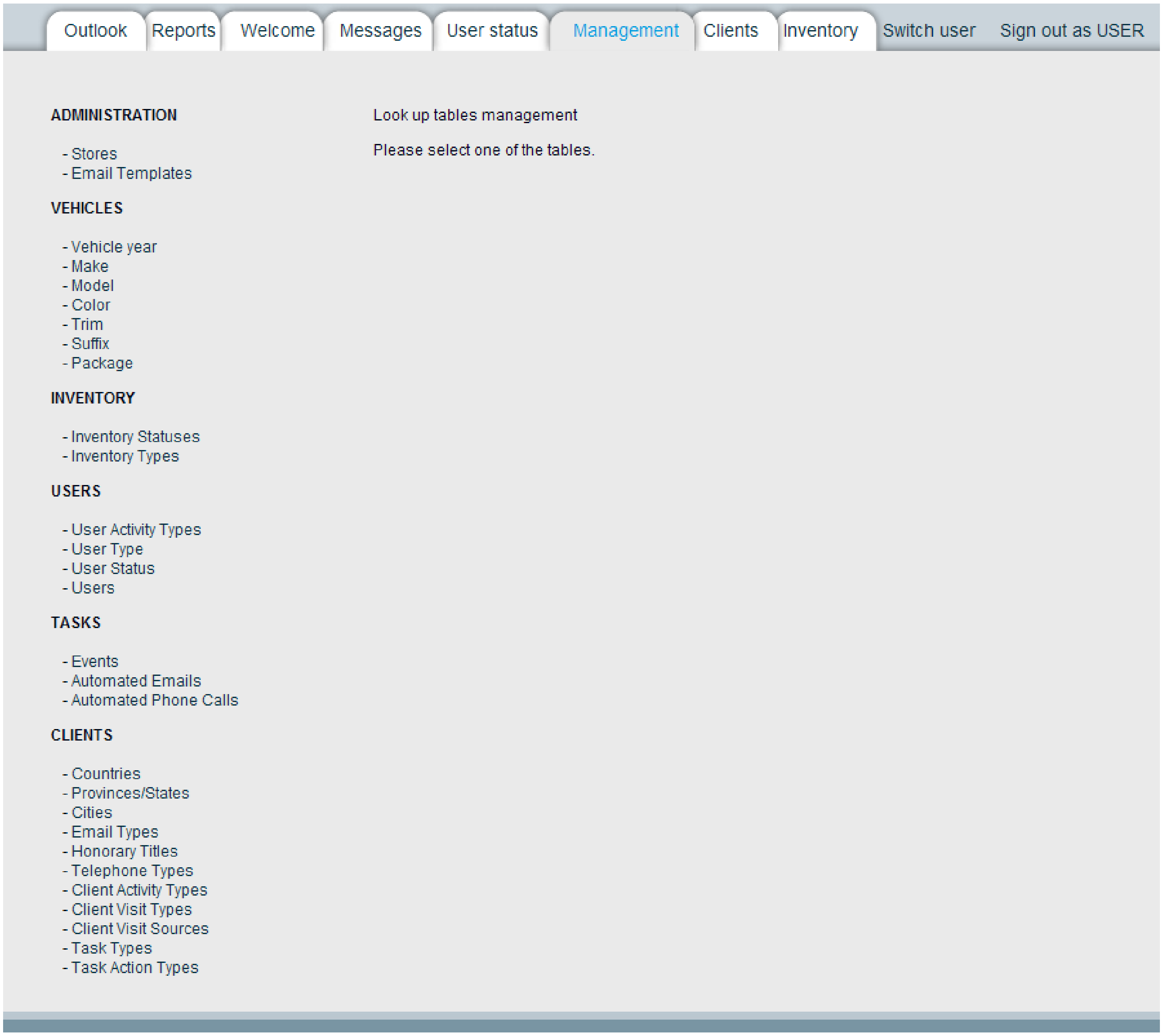
Dealership Inventory

✓ Store Inventory

- Click the “Inventory” tab to view your store vehicles.
- Search the inventory by adding criteria and by clicking **Search**.
- **Reset** to do another search.
- Sort by clicking on column **Titles**.

MANAGEMENT SETUP

✓ Set up your DI system by selecting **Management** from the top menu.



* From the side menu bar, users can input Administration, Vehicle, Inventory, and User information. Client profile options are also managed here, as well as Automated Email and Phone Call Task settings.

Store Basics

✓ Start off by entering basic dealership information – Add brochures, set store policies and levy surcharges by clicking **Stores**, and then **Edit**.

Note: "Days after last visit was made" allow users to set store Product Advisor (PA) sales policies to prevent issues from occurring between competing PA's.

Store Templates

✓ Create automated **Email Templates** for your dealership – compose templates under Management by clicking **Email Templates**.

- Click **Add New Email Template.**
- Compose an email using the appropriate email template tag(s).

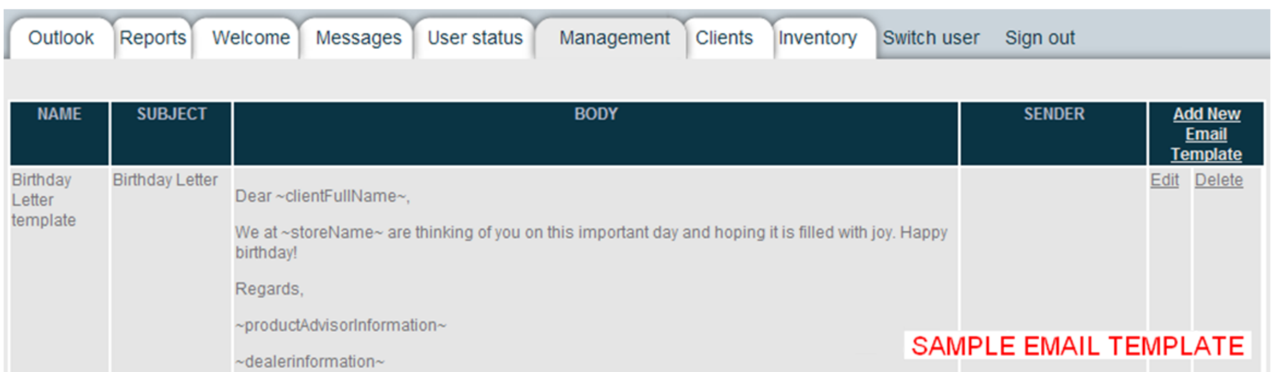
  Note: Create as many templates for your store as you would like. Templates created here are available for users to send out to clients in "Automated Emails".

Email Template Tags

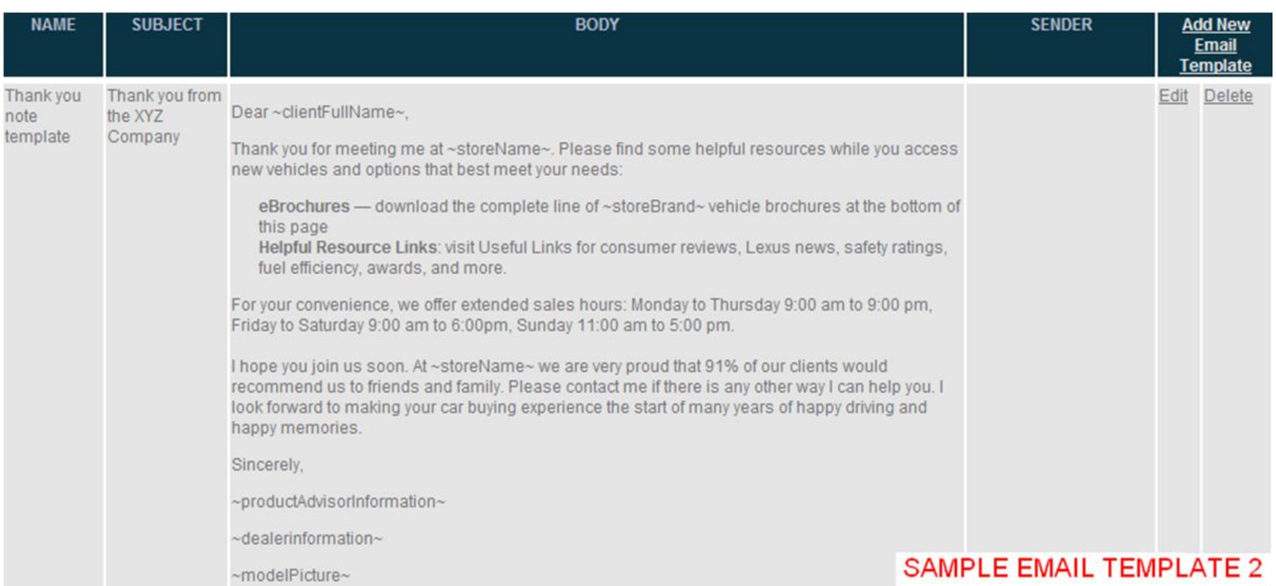
~dealerInformation~
~storeName~
~storeBrand~
~storeId~
~storeLinks~
~storeBrochures~
~vehicleInformation~
~productAdvisorInformation~
~clientFullName~
~modelPicture~

- See sample templates and emails below

Sample Email Templates

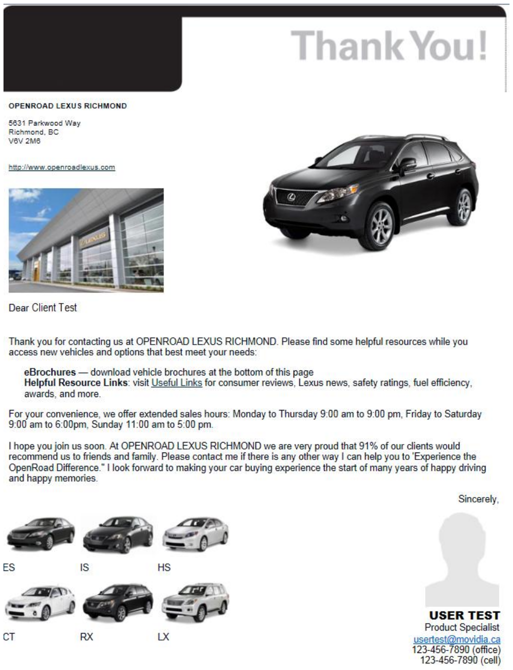


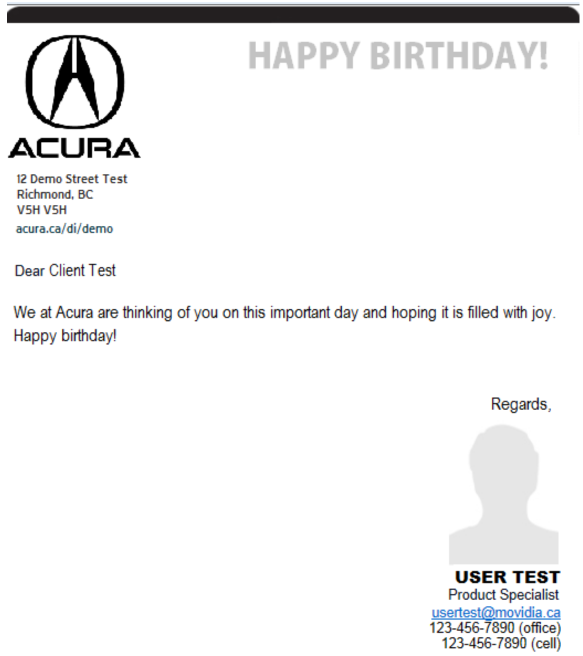
NAME	SUBJECT	BODY	SENDER	Add New Email Template	
Birthday Letter template	Birthday Letter	Dear ~clientFullName~, We at ~storeName~ are thinking of you on this important day and hoping it is filled with joy. Happy birthday! Regards, ~productAdvisorInformation~ ~dealerinformation~		Edit	Delete



NAME	SUBJECT	BODY	SENDER	Add New Email Template	
Thank you note template	Thank you from the XYZ Company	Dear ~clientFullName~, Thank you for meeting me at ~storeName~. Please find some helpful resources while you access new vehicles and options that best meet your needs: **eBrochures** — download the complete line of ~storeBrand~ vehicle brochures at the bottom of this page **Helpful Resource Links**: visit Useful Links for consumer reviews, Lexus news, safety ratings, fuel efficiency, awards, and more. For your convenience, we offer extended sales hours: Monday to Thursday 9:00 am to 9:00 pm, Friday to Saturday 9:00 am to 6:00pm, Sunday 11:00 am to 5:00 pm. I hope you join us soon. At ~storeName~ we are very proud that 91% of our clients would recommend us to friends and family. Please contact me if there is any other way I can help you. I look forward to making your car buying experience the start of many years of happy driving and happy memories. Sincerely, ~productAdvisorInformation~ ~dealerinformation~ ~modelPicture~		Edit	Delete

Sample Email Message





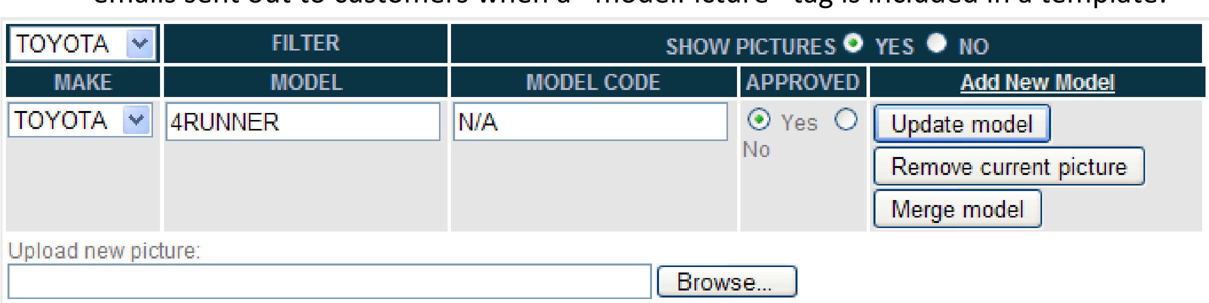
Vehicle Options

✓ Set up your Vehicle Inventory selections– Enter the **Vehicle Years, Makes, Models, Colors, Trims,** (first and second letter) **Suffixes**, and **Packages** available at your store.

Note: The data entered in these fields become available for Users *(i.e. Product Advisors)* to select when creating Client Visits and recording client enquiries. It is important that you provide all the available selections and/or combinations to ensure complete and accurate data entry.

✓ Add Vehicle Model Images – Browse and upload images for different vehicles by clicking **Edit** next to the vehicle **Model**.

Note: This step is not required but would be a great compliment to the automated emails sent out to customers when a ~modelPicture~ tag is included in a template.



- **Browse…** for an image on your computer
- **Update model** when upload is complete.

Inventory Selections

- ✓ View the available default **Inventory Statuses** and **Inventory Types** selections – If required, add or make changes to the existing selections.
  - Inventory *types* indicate the condition (*i.e.* New, Used, Demo) of a vehicle. Inventory type selections allow users to search for vehicles by "TYPE" in Inventory (You can try this query by clicking "Inventory" from the top menu and by selecting a *type* from the drop down menu).
  - Inventory *statuses* allow users to indicate and track a vehicle's current state (*i.e.* Sold, in Inventory, or being Located).

User Profiles

- ✓ Add New **Users** – Create store user accounts by entering identification, User Type, and User Status information and by creating a Login for each staff member.
  - If a required User Type selection is not listed by default, add a new user type by clicking **User Type** and then contact Movidia System Providers to set up Access Control.
  - If a required User Status selection is not listed by default, add a new user status by clicking **User Status**.

User Activity Types

- ✓ View the available default **User Activity Types** selections – Add a new Activity Type by clicking **Add New User Activity Type**.
  - The *User Activity Types* are created for employees to indicate his/her whereabouts and availability under the "User Status" section from the top menu.

Store Automated Settings

- ✓ Set up **Automated Emails** – Indicate the specific template and event and time (day/hour after the event) in which to send out an email to customers.

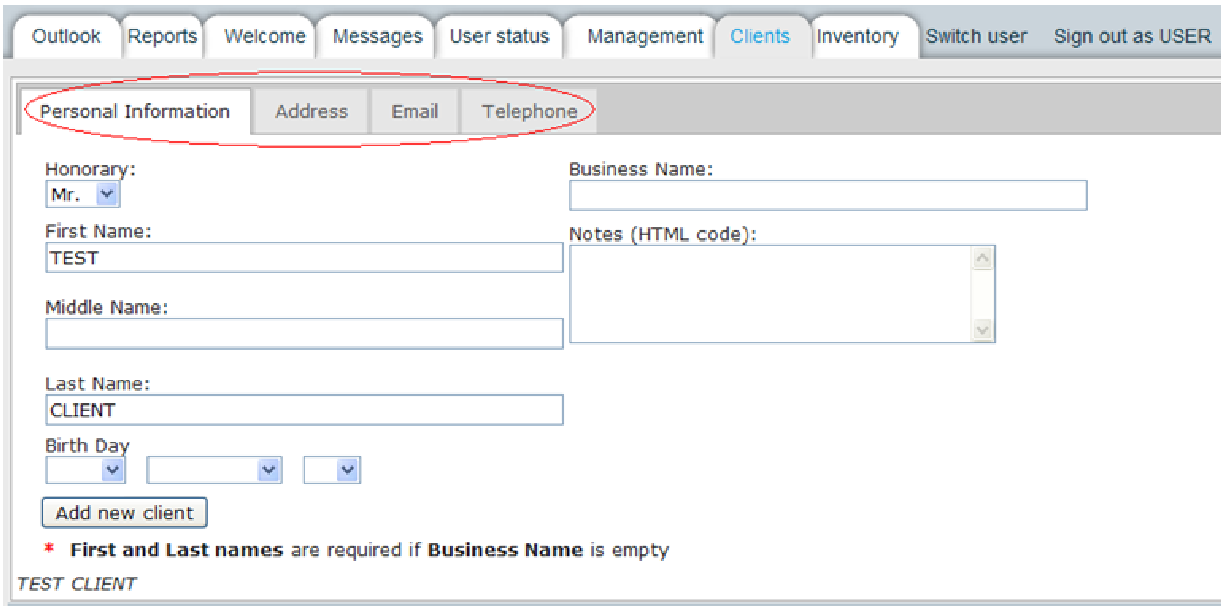
  Note: Only Super Administrator user types can set *global* emails, and only Manager user types can set *store* emails. Product Advisors (PA) can set up automated emails individually for their own clients.
- ✓ Set up **Automated Phone Calls** – Set up automated reminders for you (and other staff) to make follow-up phone calls to customers.

  Note: Only Super Administrator user types can set global phone call reminders, and only Manager user types can set store phone call reminders. Product Advisors (PA) can set up individual phone call reminders for their own clients.

Client Profile Selections

✓ Check the default **Honorary Titles**, Address (**Countries**, **Province/State**, and **Cities**), **Email Types**, and **Telephone Types** selections available – Add new selections to a field if needed.

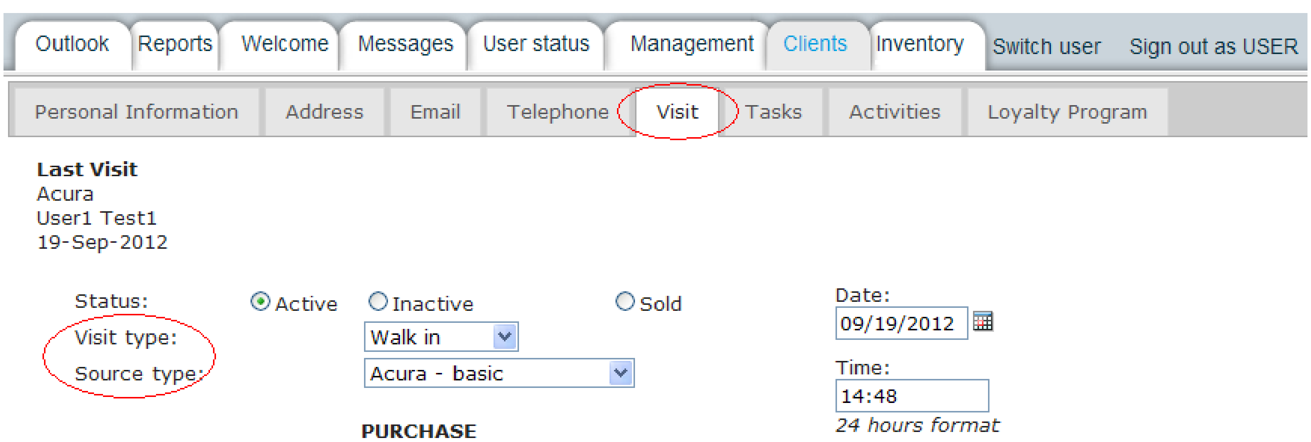
Note: These are the selections available to users (*i.e. Product Advisors)* when they Add a New Client and enter basic client information.



*There are four sections in a Client Profile designated for users to enter basic personal and contact information.

✓ View the available default **Client Visit Types** and **Client Visit Sources** selections – If required, add or make changes to the existing selections.

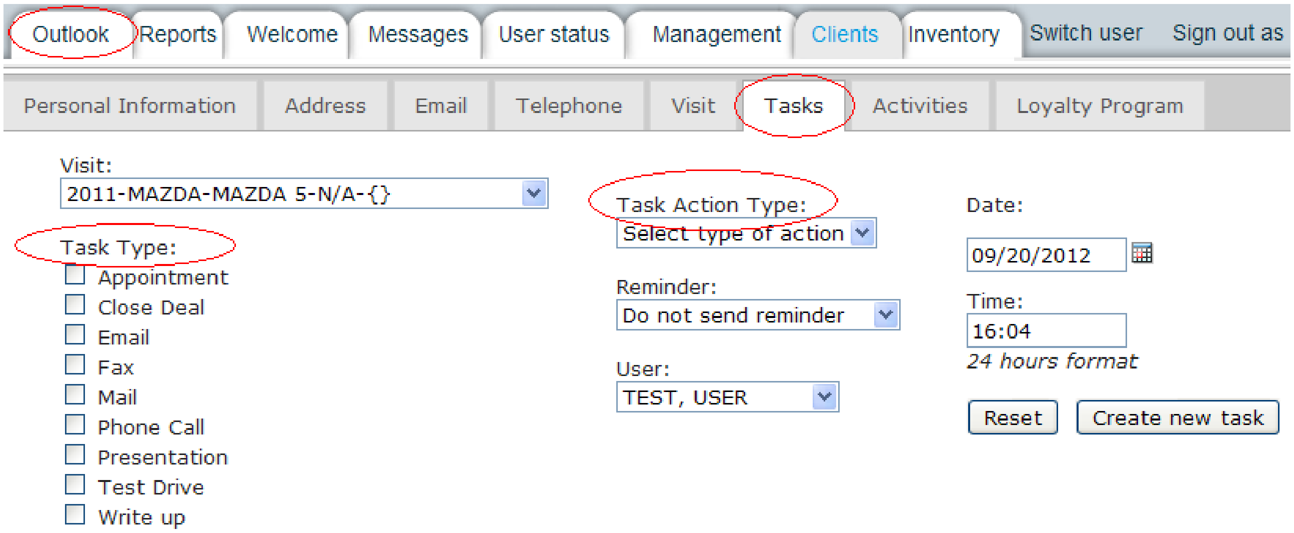
Note: These are the selections available for Users *(i.e. Product Advisors)* to select when creating Client Visits and entering visit information.



*Purchase and appraisal details are also entered in this page. See Client Management below.

✓ Check the default **Task Types** and **Task Action Types** selections – Add a client task type and/or action type if needed.

- The "Tasks" function allows users to set client tasks and reminders for themselves. Once set, these tasks will be displayed in the Outlook home screen.



✓ Check the default **Client Activity Types** selections – Add new selections if needed.

Note: These are the selections available for Users *(i.e. Product Advisors)* to select when recording a Client Activity.

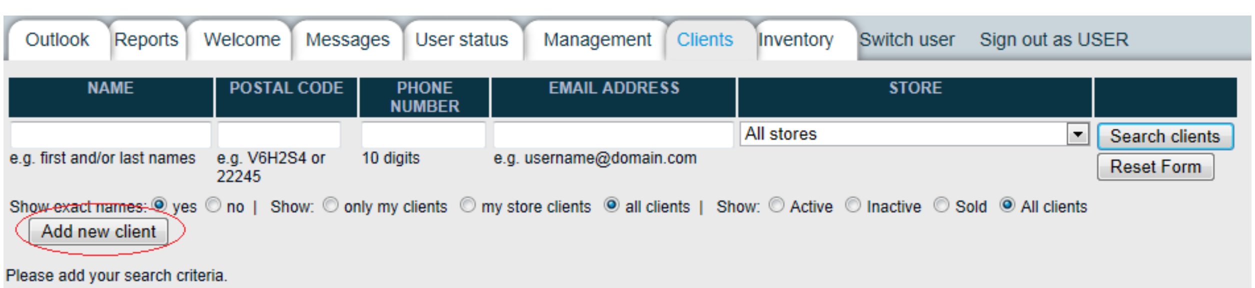
CLIENT MANAGEMENT

✓ See how you can manage Customer Profiles – create new client profiles, and view, edit, or delete existing client profiles. Start by selecting **Clients** from the top menu.

How to Create a Customer Profile

✓ Add a Client by selecting the "Clients**"** tab from the top menu.

- Click **Add new client**.



✓ Enter Client’s Personal Information

*First and Last names are required if Business Name is empty

- If applicable, add a **note** into the textbox.
- Include an HTML code to customize font and background colors for notes.
  Note: Any notes entered into this field are displayed by a speech balloon next to the client’s name in the Outlook home screen.

Date	Client	Phone	Year	Make	Model	Package	Color	EM	TD	WU	SD	TF
24-Sep-2012	CLIENT, TEST 2	123-456-7890	2007	MAZDA	MAZDA3		BLACK MICA	☑	☐	☐	☐	☐
24-Sep-2012	CLIENT, TEST	778-288-7277	2012	ACURA	CSX		ALABAS TER SILVER ME TALLIC	☑	☐	☐	☐	☐

*Users can view client notes by dragging their curser over the speech balloon.

✓ Enter Address and Contact information

- Select “Address” and input Client Address if available.
- Click **Add new client**. Email, Telephone, and Visit tabs will be displayed.
- Enter client contact information by selecting the “Email” and “Telephone” tabs.
- Click **Update client**.

✓ Create a Visit

- Click **Add new visit**.
- Indicate visit details (Status, Visit/Source type, and Data/Time).
- Record Vehicle Purchase details.
- If applicable, enter Appraisal information.
- Click **Create visit**.
- Create separate visits for each vehicle.

✓ Enter a new Task

- Select the “Tasks” tab. Any automated phone call reminders set under “Management” will be displayed here as a scheduled task.
- Enter an additional task or set reminders by clicking **Enter new task**.

✓ Record an Activity

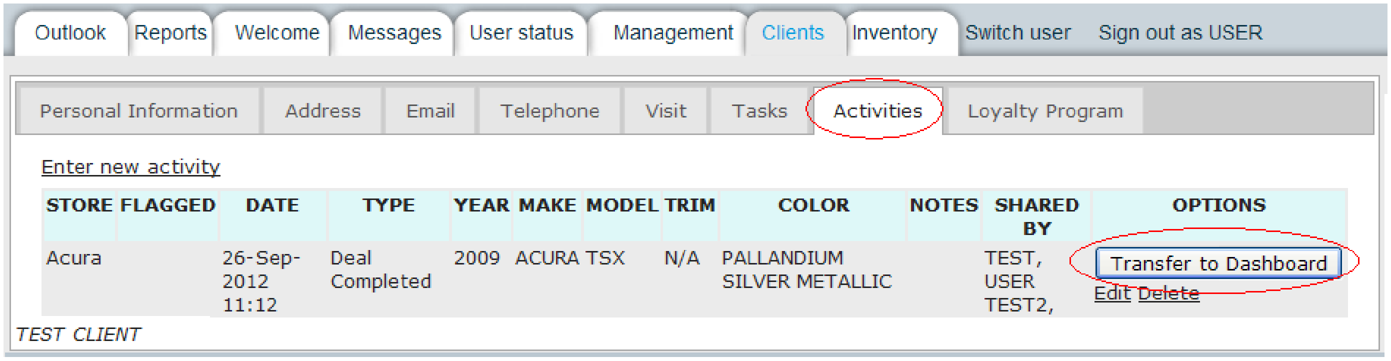
- Click **Enter new activity** and enter activity details.
- If the activity is shared, indicate the other staff member(s) by selecting the **Name** and arrow key.

  *Activities can only be recorded for Visits that are complete. Visits must include a Vehicle Type, Year, Make, Model, and Color in order to be considered complete.

- Click **Create activity record** to submit.

How to Transfer Store Activities to Dashboard

✓ Transfer to Dashboard



- Locate the Client by selecting the “Clients” tab. Add search criteria and click **Search clients**.
- Select the client’s **Name**.
- Select the “Activities” tab and click **Transfer to Dashboard**.

  Note: Managers can view and transfer client activities for their entire store using Reports. See “Transfer Activity Report” for more information.

How to Print Dealer Forms

✓ Locate the Client

- Select the “Clients” tab. Add search criteria and click **Search clients**.
- Select the client’s **Name**.

✓ Print Worksheet and/or Demonstrator Agreement

- Select the “Visit” tab and click **Print new Worksheet** and/or **Demonstrator Agreement** under the Options column. A new window will open.
- Select (or deselect) the pages you wish to print and click **Print**.

How to Edit a Customer Profile

✓ Locate the Client

- Select the “Clients” tab.
- Add search criteria and click **Search clients**.
- Select the client’s **Name** or click **Edit**.

✓ Make changes to Profile

- Edit and click **Update client**.

How to Remove a Customer Profile

✓ Locate Customer

- Select the “Clients” tab.
- Add search criteria and click **Search clients**.

✓ Remove any child records

*The parent record on customer info cannot be deleted if there is at least one child record present.

- To find out what child record (if any) is present, remove the client by clicking **Delete**.
  - If a child record is present, a message will be displayed at the bottom of the screen.
- View message and remove the specified record on the client’s profile by clicking **Edit**.

✓ Remove Profile

- When all child records are removed, click **Delete**.

USER MANAGEMENT

How to Update a User Profile

✓ Locate User

- Select the “Management” tab and click **Users.**
- Next to the user’s name, click **Edit**.

✓ Make changes to Profile

- Edit and click **Update user**.

How to Remove a User Profile

✓ Locate User

- Select the “Management” tab and click **Users.**

✓ Remove any child records

*The parent record on user info cannot be deleted if there is at least one child record present.

- To find out what child record (if any) is present, remove the user by clicking **Delete**.
  - If a child record is present, a message will be displayed at the bottom of the screen.
- Next to the user’s name, click **Edit** and remove the specified record (See example below).

✓ Remove User Profile

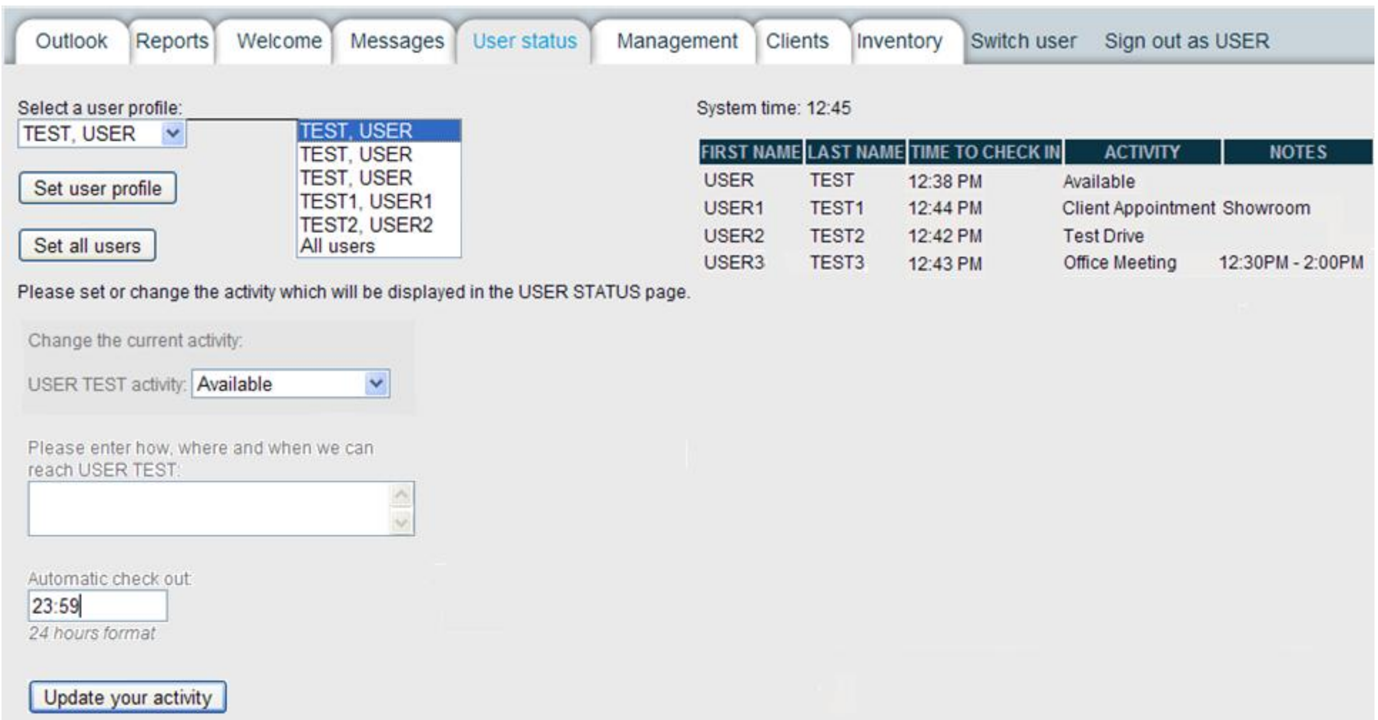
- When all child records are removed, click **Delete**.

Example Child Record Message

- The message indicates that there is a child record on “userInfoStore”.
- To delete the user profile, remove all the user’s store locations by selecting “NO” for all options under “STORES”.

How to Manage User Status

- In “User Status”, any user can broadcast a short message to inform others of their current status, including their whereabouts and availability.



* Managers have access to set and update the status of all store users.

✓ Choose a User Profile

- Select a profile from the drop down menu OR **Set all users**.

✓ Indicate User Activity

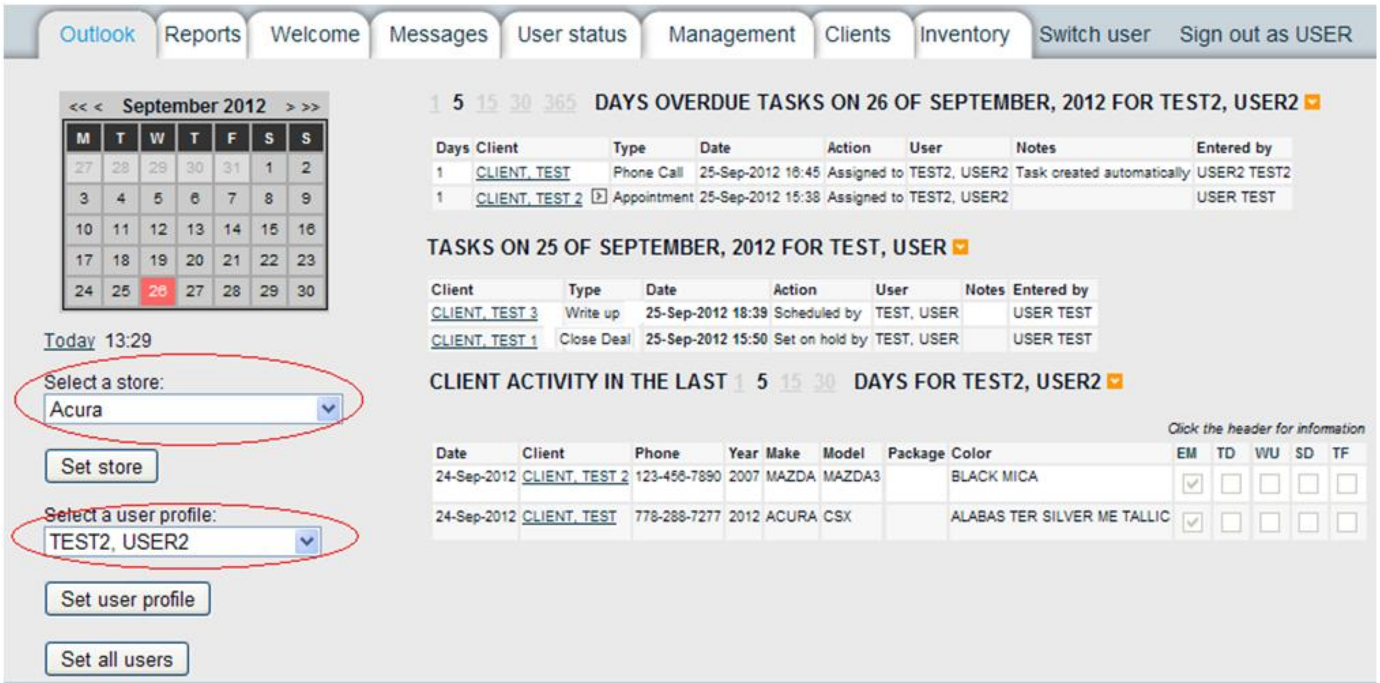
- Select an activity, enter a short message and indicate a time.

✓ Set or update status

- Click **Update** to publish activity.

How to Manage User Tasks and Activities

- In the Outlook home screen, Managers have access to view, set reminders, and control the tasks and activities of all users.



✓ Oversee Tasks and Activities of Individual Users – Select a store and user from the drop down menus and click **Set user profile**.

✓ Oversee all User Tasks and Activities in Individual Stores – Select a store from the drop down menu and click **Set all users**

✓ Assign a New Task to a User

- Select the user profile, and click the **Client**. You will be directed to the Client's profile.
- Click **enter new task**.
- Enter task details, and then submit by clicking **Update client**. The new task will appear on the user's Outlook the next time they log in.

  Note: Assign multiple tasks at once by selecting more than one task type.

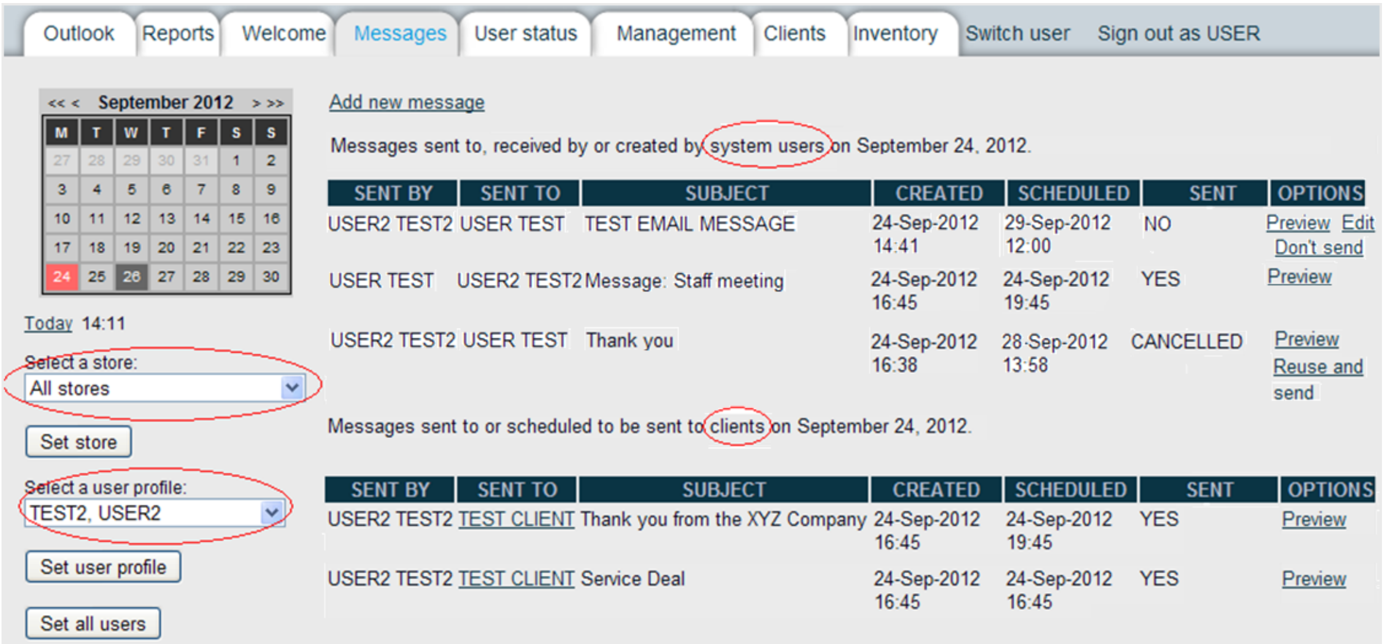
✓ Update or Make Changes to a User's Task or Activity

- Select the user profile, and click the **Client**. You will be directed to the Client's profile.
- Click **Edit** next to the Task.
- Make changes (and set a reminder), and submit by clicking **Update task action**. The changes will appear on the user's Outlook the next time they log in.

EMAIL MANAGEMENT

How to Monitor Store Emails and Messages

- In **Messages**, Managers have access to oversee all email activities at their store.



*Email activities to and from associates are separated from those of clients.

✓ Oversee Email Activities of Individual Users – Select a store & user and click **Set user profile**

✓ Oversee Email Activities in Individual Stores – Select a store and click **Set all users**

How to Send an Email Message

✓ In **Messages**, click **Add new message**.

✓ Enter a Subject

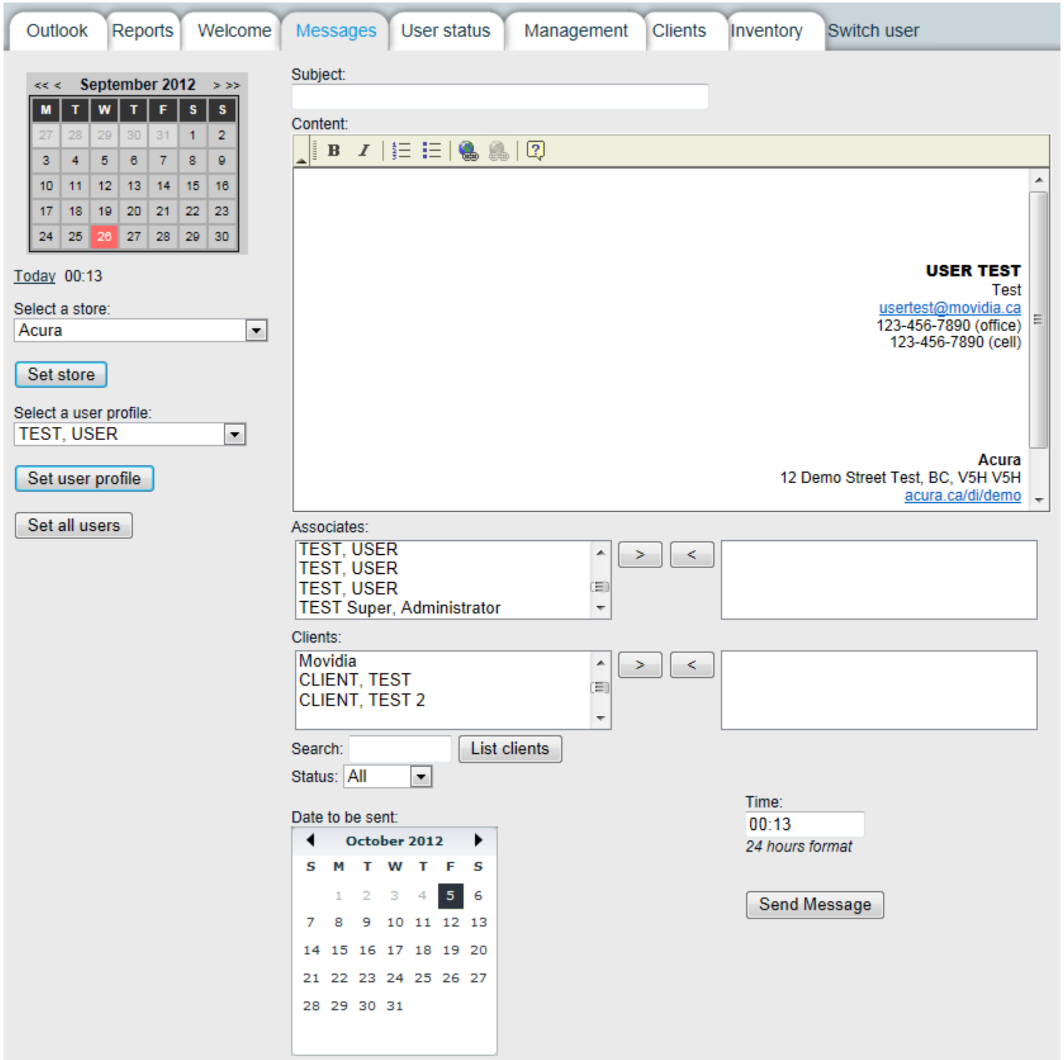
✓ Compose Message

✓ Choose Recipients

- Select the Associate and/or Client OR Locate a Client by typing into the search field.

✓ Indicate a Date and Time to Send

✓ Send Message



How to Edit an Email Message

✓ Locate the Email

- Select the **date** in which the email is scheduled to send using the web calendar.

✓ Make changes – Click **Edit** under the "Options" column.

How to Cancel an Email Message

✓ Locate the Email

- Select the **date** in which the email is scheduled to send using the web calendar.

✓ Cancel the email

- Click **Don't Send** under the "Options" column.
- Submit a reason for cancellation.

Note: Cancelled emails remain stored and can be reused and sent at a later time.

GENERATING REPORTS

How to Generate a Report

✓ Select **Reports** from the top menu

✓ Choose a Report to generate

- Narrow your report to a particular store (if applicable) by selecting a store from the drop down menu.
- Narrow your report to a particular user by selecting a user profile (if applicable) from the drop down menu.

✓ Add Report search criteria (*i.e.* set dates)

Traffic Management System (TMS) Report

- Generate a Report to view your Store(s) Traffic.
    - Set dates or generate a daily, weekly, monthly, or yearly TMS Report.

TMS report

From: 09/01/2012 To: 09/27/2012 Set Dates

Today This Week Last Week This Month Last Month This Year Last Year

Sep 2012	UPS		PRES		DEMO				WORKSHEET				NEW SLS		USED SLS		SLS TOTAL	
STAFF	MTD	YTD	MTD	YTD	MTD	%	YTD	%	MTD	%	YTD	%	MTD	YTD	MTD	YTD	MTD	YTD
TESTUSER,A	8	90	0	0	0	0%	2	2%	0	0%	0	0%	0	0	0	0	0	0
TESTUSER,B	11	112	12	102	4	36%	63	56%	0	0%	21	19%	0	11	0	3	0	14
TESTUSER,C	6	200	6	154	6	100%	123	62%	1	17%	35	18%	1	32	0	4	1	36
TESTUSER,D	24	193	9	146	7	29%	106	55%	1	4%	52	27%	1	33	0	14	1	47
TESTUSER,E	11	72	10	71	8	73%	48	67%	0	0%	6	8%	0	4	0	4	0	8
All PAs	60	663	37	473	25	42%	342	52%	2	3%	114	17%	2	80	0	25	2	105

Print report

SLS TOTAL WITH EMAIL		CLS RATIO		EMAIL CAPTURE		CALL COMPLETED		CALL COMPLETED 48 HOURS	
MTD	YTD	MTD	YTD	MTD	YTD	MTD	YTD	MTD	YTD
0	0	0%	0%	13%	14%	0%	0%	0%	0%
0	78%	0%	13%	18%	20%	0%	8%	0%	0%
0%	72%	17%	18%	0%	31%	0%	1%	0%	0%
100%	80%	4%	24%	50%	54%	94%	98%	0%	0%
0	87%	0%	11%	9%	25%	15%	21%	0%	0%
50%	78%	3%	16%	27%	33%	0%	0%	0%	0%

*TMS Report continued

Client Visit Types Report

- Generate the total number of Client Visits at your store.
- See which types of visits are most common.
- Track the types and total number of visits for each Product Advisor.
  - Set dates or generate a daily, weekly, monthly, or yearly Client Visit Report.

CLIENT VISIT TYPES

From: 09/01/2012 To: 09/30/2012 Set Dates

Today This Week Last Week This Month Last Month This Year Last Year

Product Advisor	Appointment	BDC-Up	Be Back	Email	Fax	Phone Call	Referral	Repeat	Service Order	Walk in	Total
TESTUSER,A	0	0	0	0	0	0	1	0	0	0	1
TESTUSER,B	5	0	4	0	0	0	5	0	0	7	21
TESTUSER,C	2	0	5	1	0	1	1	2	0	14	26
TESTUSER,D	0	0	2	0	0	0	0	0	0	6	8
TESTUSER,E	2	0	1	0	0	0	1	2	0	4	10

Client Enquiry Report

- Generate a list of customers from your client database using the vehicle search criteria.
  - Set dates or generate a daily, weekly, monthly, or yearly Client Enquiry Report.
- See which customers have shown interest in, have requested information on, or have purchased a particular vehicle.
- View client profile summaries from the generated customer list.
  - Click to view customer contact details.
- Export to Excel by clicking the Excel icon.
  - Open Excel and paste customer information onto spreadsheet.

CLIENT ENQUIRY

From: 01/01/2012 To: 12/31/2012 Set Dates

Today This Week Last Week This Month Last Month This Year Last Year

Status: Active Inactive Sold All

Vehicle Type: New Demo Used All

Year: Unknown

Make: TOYOTA

Model[Model Code]: Unknown

Package: Unknown

Search Clean Form

CLIENT ENQUIRY

Click the header for information

Date	Client	Phone	Year	Make	Model	Package	Color	EM	TD	WU	SD	TF

Print report

Transfer Activity Report

- See which activities have (or have not yet) been transferred to Dashboard.
    - View transfer activity in the last 30, 60, 90, 120, or 360 days.
- Transfer multiple activities to Dashboard immediately.

TRANSFER ACTIVITY IN THE LAST 30 DAYS FOR ALL PRODUCT ADVISORS

Transfer activity in the last 30 60 90 120 360 days

Client	Phone	Year	Make	Model	Trim	Color	Transfer
CLIENT, TEST 0	123-456-7890	2011	ACURA	TL	N/A	POLISHED METAL METALLIIC	Transfer to Dashboard
CLIENT, TEST 1	123-456-7890	2009	ACURA	TSX	N/A	PALLANDIUM SILVER METALLIC	Transfer to Dashboard
CLIENT, TEST 2	123-456-7890	2008	HONDA	CR-V LX	N/A	NIGHTHAWK BLACK PEARL	Transfered
CLIENT, TEST 3	123-456-7890	2012	HONDA	FIT LX 5AT	N/A	BELIZE BLUE PEARL	Transfered

PAs Activity Report

- Oversee all Product Advisor (PA) activities in your store location(s).
- Get an overview of what staff are doing for customers (Number of Test Drives, Write Ups, etc.)
- View the performance of your Product Advisors – see how many Ups a PA took or how many vehicles they are selling within a time period.
    - Set dates or generate a daily, weekly, monthly, or yearly Product Advisor Activity Report.

PRODUCT ADVISORS ACTIVITIES

From: 01/01/2012 To: 12/31/2012 Set Dates

Today This Week Last Week This Month Last Month This Year Last Year

Product Advisor	UPS	Test Drives	Write Ups	Sold
TESTUSER, A	157	120	60	54
TESTUSER, B	74	40	62	55
TESTUSER, C	153	44	7	47
TESTUSER, D	150	121	78	43
TESTUSER, E	50	46	46	45

Internet Activity Report

- View the number of Leads your store generates through Internet Activities (*i.e.* company website, craigslist, etc.)
- View the number of appointments being made, and/or the number of vehicles sold through internet activities at your store.
- See which Product Advisors are making the most leads, appointments, or sales through internet activities and determine their closing ratios (Cls Ratio).
    - Set dates or generate a daily, weekly, monthly, or yearly Internet Activity Report.

INTERNET ACTIVITY

From: 01/01/2012 To: 12/31/2012 Set Dates

Today This Week Last Week This Month Last Month This Year Last Year

Product Advisor	Leads	Appt Made	Sold	Cls Ratio
TESTUSER,A	17	14	5	29.41%
TESTUSER,B	2	0	1	50.00%
TESTUSER,C	21	3	6	28.57%
TESTUSER, D	8	8	0	0.00%
TESTUSER,E	3	1	2	66.67%

Showroom vs Purchased Report

- See which vehicles are most popular amongst clients at your store.
- See which showroom vehicles increase your store sales
    - Set dates or generate a daily, weekly, monthly, or yearly Showroom vs. Purchased Report.

SHOWROOM vs PURCHASED

From: 09/01/2012 To: 09/30/2012 Set Dates

Today This Week Last Week This Month Last Month This Year Last Year

Vehicle	Showroom	Purchased
CRV LX 4WD	5	2
CIVIC 4D EXL-NAVI 5AT	5	3
CIVIC 2D EX-SR 5MT	2	1
FIT DX-A 5AT	1	0
ACCORD 2D EX-L V6 NAVI 5AT	1	0
ODYSSEY LX 5AT	2	1