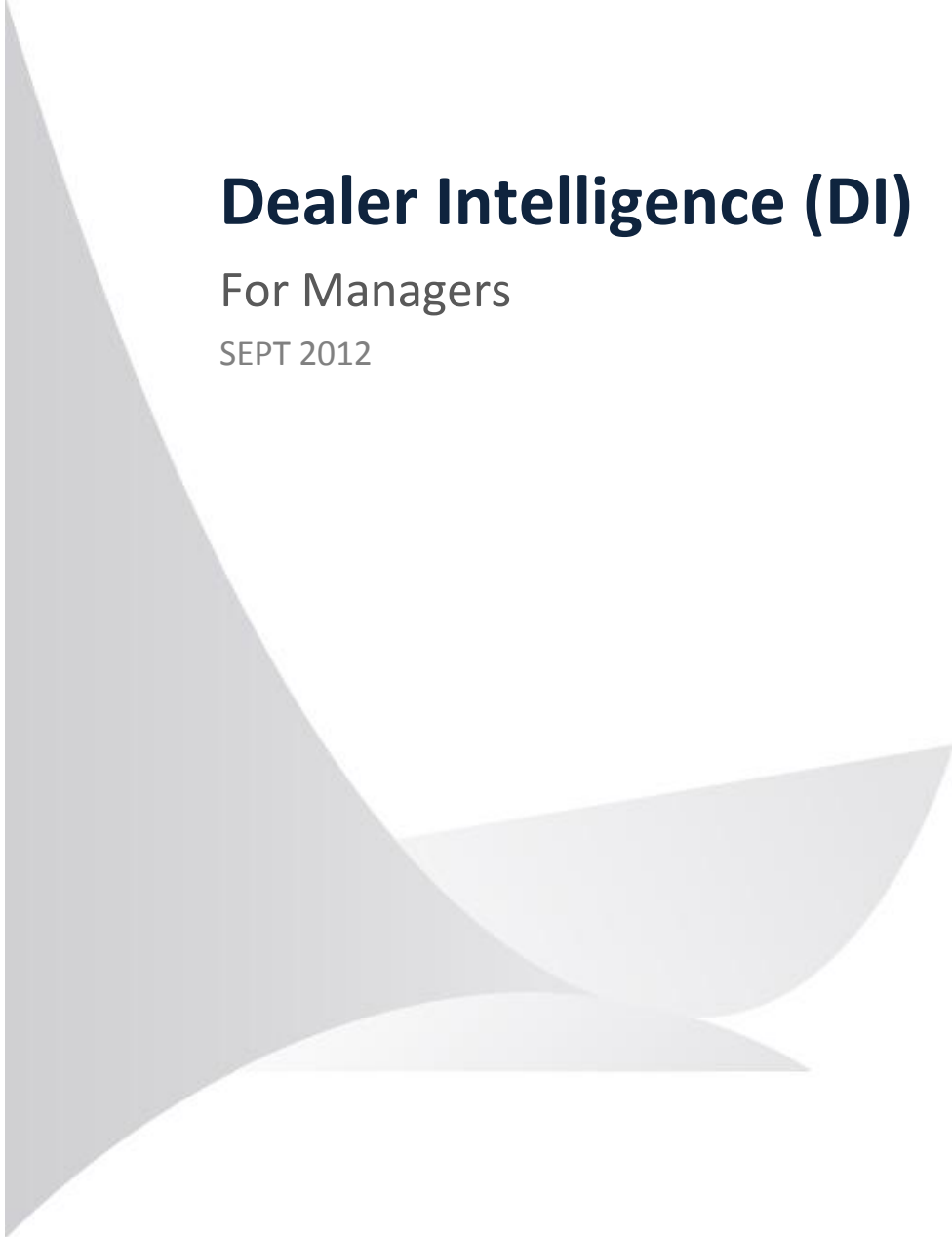




Dealer Intelligence (DI)

For Managers

SEPT 2012

SET UP & QUICK REFERENCE GUIDE

DI Set Up and Reference Guide for Managers

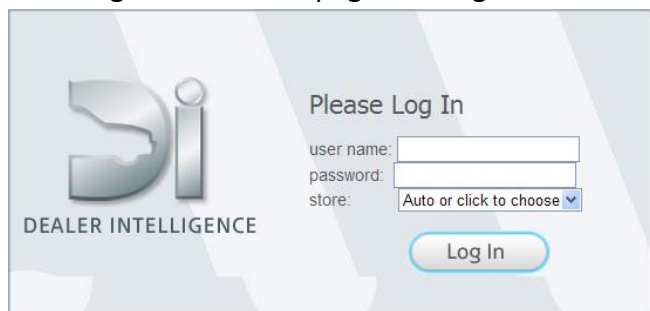
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GETTING STARTED WITH DEALER INTELLIGENCE

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.

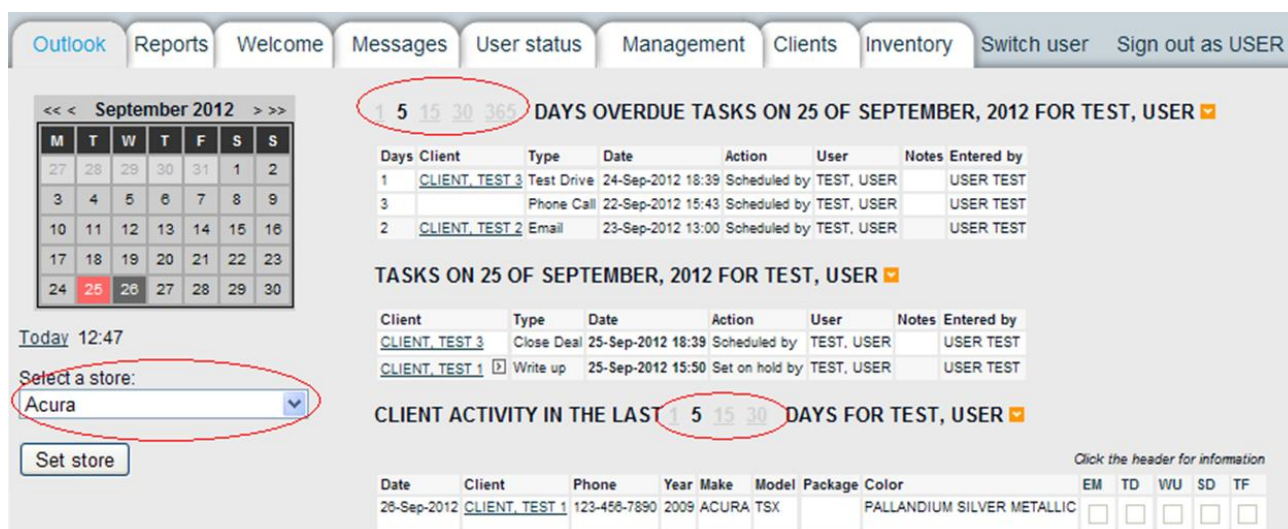


The login page features the Dealer Intelligence logo on the left. On the right, under the heading 'Please Log In', there are input fields for 'user name:', 'password:', and 'store:'. The 'store:' field has a dropdown menu with 'Auto or click to choose' selected. A 'Log In' button is positioned below the fields.

- 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.



The screenshot shows the Outlook Home Screen with a navigation bar at the top containing links: Outlook, Reports, Welcome, Messages, User status, Management, Clients, Inventory, Switch user, and Sign out as USER. The main content area includes a calendar for September 2012 on the left, with the 25th highlighted. Below the calendar is a 'Select a store:' dropdown menu with 'Acura' selected, and a 'Set store' button. To the right, there are sections for 'DAYS OVERDUE TASKS ON 25 OF SEPTEMBER, 2012 FOR TEST, USER' and 'TASKS ON 25 OF SEPTEMBER, 2012 FOR TEST, USER'. Both sections have a dropdown menu for selecting the number of days (1, 5, 15, 30, 365). The 'TASKS' section shows a table of tasks with columns: Days, Client, Type, Date, Action, User, Notes, and Entered by. Below this is a section for 'CLIENT ACTIVITY IN THE LAST 1 5 15 30 DAYS FOR TEST, USER' with a similar dropdown menu. At the bottom, there is a table for client activity with columns: Date, Client, Phone, Year, Make, Model, Package, Color, and a set of checkboxes for EM, TD, WU, SD, and TF.

Days	Client	Type	Date	Action	User	Notes	Entered by
1	CLIENT_TEST_3	Test Drive	24-Sep-2012 18:39	Scheduled by	TEST, USER		USER TEST
3		Phone Call	22-Sep-2012 15:43	Scheduled by	TEST, USER		USER TEST
2	CLIENT_TEST_2	Email	23-Sep-2012 13:00	Scheduled by	TEST, USER		USER TEST

Client	Type	Date	Action	User	Notes	Entered by
CLIENT_TEST_3	Close Deal	25-Sep-2012 18:39	Scheduled by	TEST, USER		USER TEST
CLIENT_TEST_1	Write up	25-Sep-2012 15:50	Set on hold by	TEST, USER		USER TEST

Date	Client	Phone	Year	Make	Model	Package	Color	EM	TD	WU	SD	TF
26-Sep-2012	CLIENT_TEST_1	123-456-7890	2009	ACURA	TSX		PALLADIUM SILVER METALLIC	☐	☐	☐	☐	☐

*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.

Welcome **USER TEST** to Dealer Intelligence.

System time: 22:52

Your access is for **Manager**.

You have access to 2store(s):

Acura
Honda Vancouver

[Change your password or email address!](#)

Please send us your questions, feedback, bug fixes and suggestions:

USER TEST is:
Reporting a bug

Please enter a concise description of your experience today:

Your email address:
usertest@movidia.ca

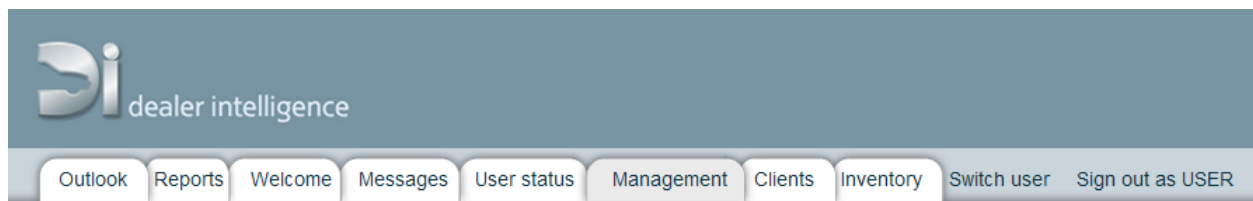
Your phone number:
1234567890

Please send us your feedback

Reporting a bug
Asking a question
Sending feedback
Giving a suggestion
Requesting a phone call
Trying to do something else

*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



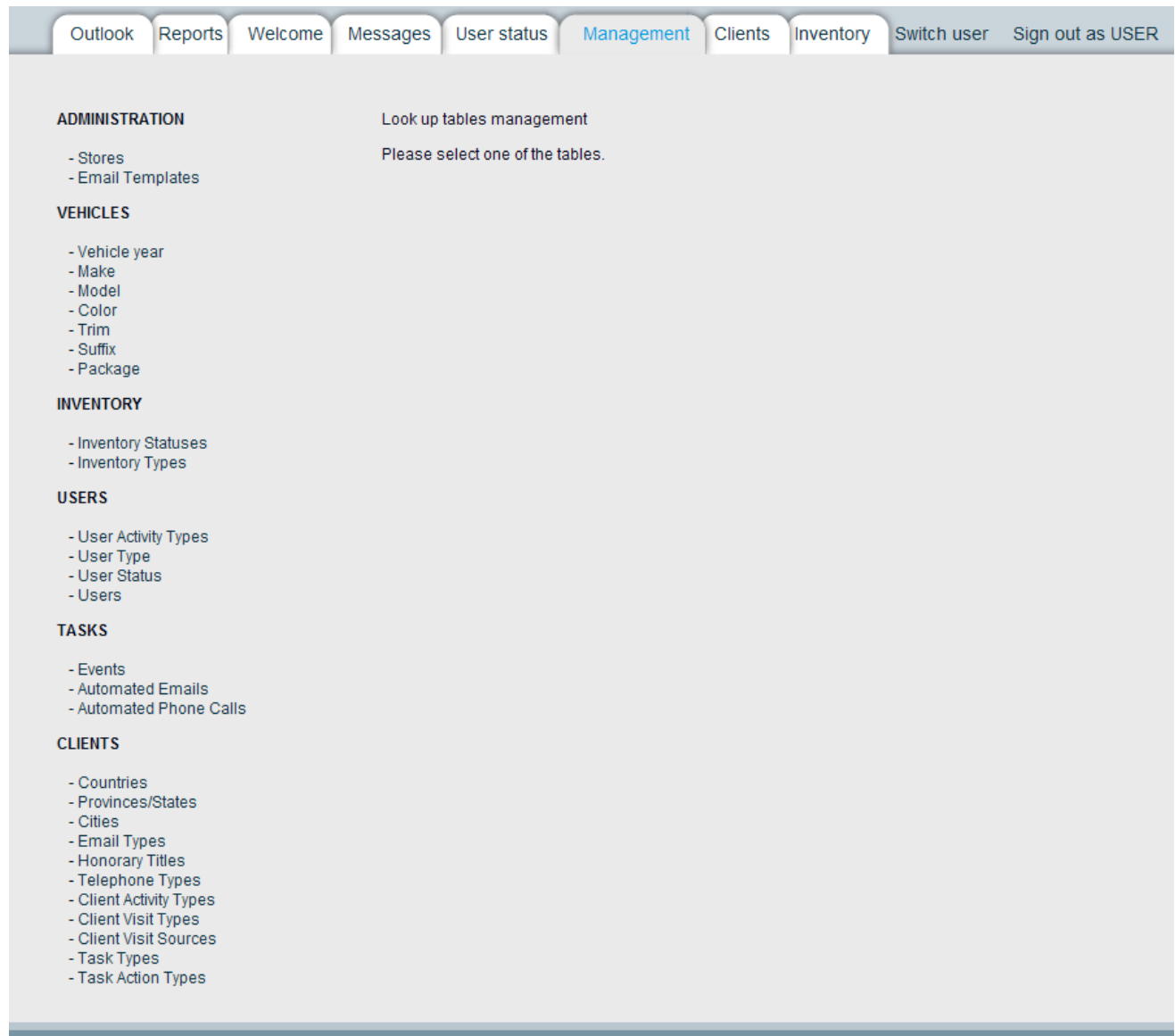
- ✓ Top Menu Tabs
 - The top menu tabs allow users to navigate between the main sections of DI.
 - Switching users and signing out options are also available from this menu.

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

Outlook	Reports	Welcome	Messages	User status	Management	Clients	Inventory	Switch user	Sign out
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				

SAMPLE EMAIL TEMPLATE

SAMPLE EMAIL TEMPLATE

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 TEMPLATE 2

Sample Email Message

Thank You!

OPENROAD LEXUS RICHMOND
5631 Parkwood Way
Richmond, BC
V6V 2M5
<http://www.openroadlexus.com>

Dear Client Test

Thank you for contacting us at OPENROAD LEXUS RICHMOND. Please find some helpful resources while you access new vehicles and options that best meet your needs:

eBrochures — download 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 OPENROAD LEXUS RICHMOND 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 to "Experience the OpenRoad Difference." I look forward to making your car buying experience the start of many years of happy driving and happy memories.

ES
 IS
 HS
 CT
 RX
 LX

Sincerely,

USER TEST
Product Specialist
usertest@movidia.ca
123-456-7890 (office)
123-456-7890 (cell)

ACURA

12 Demo Street Test
Richmond, BC
V5H V5H
acura.ca/di/demo

HAPPY BIRTHDAY!

Dear Client Test

We at Acura are thinking of you on this important day and hoping it is filled with joy. Happy birthday!

Regards,

USER TEST
Product Specialist
usertest@movidia.ca
123-456-7890 (office)
123-456-7890 (cell)

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.

TOYOTA	FILTER	SHOW PICTURES ☒ YES ☐ NO		
MAKE	MODEL	MODEL CODE	APPROVED	Add New Model
TOYOTA	4RUNNER	N/A	☒ Yes ☐ No	Update model Remove current picture Merge model

Upload new picture:

- **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.

The screenshot shows a web application interface with a top navigation bar containing tabs: Outlook, Reports, Welcome, Messages, User status, Management, Clients, Inventory, Switch user, and Sign out as USER. Below this is a sub-navigation bar with tabs: Personal Information, Address, Email, and Telephone. The 'Personal Information' tab is selected and highlighted with a red oval. The form fields include: Honorary (dropdown menu with 'Mr.' selected), Business Name (text input), First Name (text input with 'TEST'), Middle Name (text input), Last Name (text input with 'CLIENT'), Birth Day (three dropdown menus), Notes (HTML code) (text area), and an 'Add new client' button. A red asterisk note states: '* First and Last names are required if Business Name is empty'. At the bottom left, the text 'TEST CLIENT' is displayed.

*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.

The screenshot shows the same web application interface as the previous one, but with the 'Visit' tab selected in the sub-navigation bar, highlighted with a red oval. The form displays the following information: 'Last Visit' section with 'Acura', 'User1 Test1', and '19-Sep-2012'. Below this, there are three radio buttons for 'Status': 'Active' (selected), 'Inactive', and 'Sold'. To the right is a 'Date' field with '09/19/2012' and a calendar icon. Below the status buttons are two dropdown menus: 'Visit type' (with 'Walk in' selected) and 'Source type' (with 'Acura - basic' selected). To the right of these is a 'Time' field with '14:48' and a '24 hours format' label. At the bottom center, the word 'PURCHASE' is displayed.

*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.

Outlook Reports Welcome Messages User status Management Clients Inventory Switch user Sign out as

Personal Information Address Email Telephone Visit **Tasks** Activities Loyalty Program

Visit: 2011-MAZDA-MAZDA 5-N/A-{} ▼

Task Type:

- ☐ Appointment
- ☐ Close Deal
- ☐ Email
- ☐ Fax
- ☐ Mail
- ☐ Phone Call
- ☐ Presentation
- ☐ Test Drive
- ☐ Write up

Task Action Type: Select type of action ▼

Reminder: Do not send reminder ▼

User: TEST, USER ▼

Date: 09/20/2012

Time: 16:04
24 hours format

Reset Create new task

- ✓ 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**.

Outlook Reports Welcome Messages User status Management Clients Inventory Switch user Sign out as USER

NAME	POSTAL CODE	PHONE NUMBER	EMAIL ADDRESS	STORE
e.g. first and/or last names	e.g. V6H2S4 or 22245	10 digits	e.g. username@domain.com	All stores

Search clients Reset Form

Show exact names: ☒ yes ☐ no | Show: ☐ only my clients ☐ my store clients ☒ all clients | Show: ☐ Active ☐ Inactive ☐ Sold ☒ All clients

Add new client

Please add your search criteria.

✓ 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		ALABASTER SILVER METALLIC	☒	☐	☐	☐	☐

*Users can view client notes by dragging their cursor 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 Date/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

The screenshot shows the Movidia Intelligence interface. At the top, there are navigation tabs: Outlook, Reports, Welcome, Messages, User status, Management, Clients, Inventory, Switch user, and Sign out as USER. Below these, there are sub-tabs for a specific client: Personal Information, Address, Email, Telephone, Visit, Tasks, Activities (highlighted with a red circle), and Loyalty Program. Under the 'Activities' tab, there is a link 'Enter new activity'. Below that is a table with the following columns: STORE FLAGGED, DATE, TYPE, YEAR, MAKE, MODEL, TRIM, COLOR, NOTES, SHARED BY, and OPTIONS. The table contains one row of data for a client named 'Acura' with a date of '26-Sep-2012 11:12', type 'Deal Completed', year '2009', make 'ACURA', model 'TSX', trim 'N/A', color 'PALLADIUM SILVER METALLIC', and shared by 'TEST, USER TEST2'. In the 'OPTIONS' column, there is a button 'Transfer to Dashboard' (highlighted with a red circle) and links 'Edit' and 'Delete'.

STORE FLAGGED	DATE	TYPE	YEAR	MAKE	MODEL	TRIM	COLOR	NOTES	SHARED BY	OPTIONS
Acura	26-Sep-2012 11:12	Deal Completed	2009	ACURA	TSX	N/A	PALLADIUM SILVER METALLIC		TEST, USER TEST2,	Transfer to Dashboard Edit Delete

TEST CLIENT

- 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 parent record on userInfo can not be deleted because there is at least one child record on userInfoStore

- 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.

FIRST NAME	LAST NAME	TIME TO CHECK IN	ACTIVITY	NOTES
USER	TEST	12:38 PM	Available	
USER1	TEST1	12:44 PM	Client Appointment	Showroom
USER2	TEST2	12:42 PM	Test Drive	
USER3	TEST3	12:43 PM	Office Meeting	12:30PM - 2:00PM

* 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.

Outlook Reports Welcome Messages User status Management Clients Inventory Switch user Sign out as USER

<< September 2012 >>>

M	T	W	T	F	S	S
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

Today 13:29

Select a store:
Acura

Set store

Select a user profile:
TEST2, USER2

Set user profile

Set all users

1 5 15 30 365 DAYS OVERDUE TASKS ON 26 OF SEPTEMBER, 2012 FOR TEST2, USER2

Days	Client	Type	Date	Action	User	Notes	Entered by
1	CLIENT, TEST	Phone Call	25-Sep-2012 16:45	Assigned to TEST2, USER2	Task created automatically	USER2 TEST2	
1	CLIENT, TEST 2	Appointment	25-Sep-2012 15:38	Assigned to TEST2, USER2		USER TEST	

TASKS ON 25 OF SEPTEMBER, 2012 FOR TEST, USER

Client	Type	Date	Action	User	Notes	Entered by
CLIENT, TEST 3	Write up	25-Sep-2012 18:39	Scheduled by	TEST, USER		USER TEST
CLIENT, TEST 1	Close Deal	25-Sep-2012 15:50	Set on hold by	TEST, USER		USER TEST

CLIENT ACTIVITY IN THE LAST 1 5 15 30 DAYS FOR TEST2, USER2

Date	Client	Phone	Year	Make	Model	Package	Color	EM	TD	W/U	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		ALABASTER SILVER METALLIC	☒	☐	☐	☐	☐

Click the header for information

- ✓ 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.

The screenshot displays the 'Messages' tab in a software interface. At the top, there are navigation tabs: Outlook, Reports, Welcome, Messages (active), User status, Management, Clients, Inventory, Switch user, and Sign out as USER. Below the tabs, on the left, is a calendar for September 2012 with the 24th highlighted. To the right of the calendar are filter options: 'Select a store:' with a dropdown menu showing 'All stores', and 'Select a user profile:' with a dropdown menu showing 'TEST2, USER2'. Below these are buttons for 'Set store', 'Set user profile', and 'Set all users'. The main area shows two message lists. The first list is titled 'Messages sent to, received by or created by system users on September 24, 2012.' and contains three entries. The second list is titled 'Messages sent to or scheduled to be sent to clients on September 24, 2012.' and contains two entries. Each entry in the lists has columns for SENT BY, SENT TO, SUBJECT, CREATED, SCHEDULED, SENT, and OPTIONS.

SENT BY	SENT TO	SUBJECT	CREATED	SCHEDULED	SENT	OPTIONS
USER2 TEST2	USER TEST	TEST EMAIL MESSAGE	24-Sep-2012 14:41	29-Sep-2012 12:00	NO	Preview Edit Don't send
USER TEST	USER2 TEST2	Message: Staff meeting	24-Sep-2012 16:45	24-Sep-2012 19:45	YES	Preview
USER2 TEST2	USER TEST	Thank you	24-Sep-2012 16:38	28-Sep-2012 13:58	CANCELLED	Preview Reuse and send

SENT BY	SENT TO	SUBJECT	CREATED	SCHEDULED	SENT	OPTIONS
USER2 TEST2	TEST CLIENT	Thank you from the XYZ Company	24-Sep-2012 16:45	24-Sep-2012 19:45	YES	Preview
USER2 TEST2	TEST CLIENT	Service Deal	24-Sep-2012 16:45	24-Sep-2012 16:45	YES	Preview

*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

Outlook Reports Welcome **Messages** User status Management Clients Inventory Switch user

<< September 2012 >>

M	T	W	T	F	S	S
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

Today 00:13

Select a store:
Acura

Set store

Select a user profile:
TEST, USER

Set user profile

Set all users

Subject:

Content:

USER TEST
Test
usertest@movidia.ca
123-456-7890 (office)
123-456-7890 (cell)

Acura
12 Demo Street Test, BC, V5H V5H
acura.ca/di/demo

Associates:

TEST, USER
TEST, USER
TEST, USER
TEST Super, Administrator

Clients:

Movidia
CLIENT, TEST
CLIENT, TEST 2

Search: List clients

Status: All

Date to be sent:

< October 2012 >

S	M	T	W	T	F	S
1	2	3	4	5	6	
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

Time:
00:13
24 hours format

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: To:

[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: To:

[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:

Make:

Model[Model Code]:

Package:

CLIENT ENQUIRY 

Click the header for information

Date	Client	Phone	Year	Make	Model	Package	Color	EM	TD	WU	SD	TF
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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 METALLIC	Transfer to Dashboard
CLIENT_TEST 1	123-456-7890	2009	ACURA	TSX	N/A	PALLADIUM SILVER METALLIC	Transfer to Dashboard
CLIENT_TEST 2	123-456-7890	2008	HONDA	CR-V LX	N/A	NIGHTHAWK BLACK PEARL	Transferred
CLIENT_TEST 3	123-456-7890	2012	HONDA	FIT LX 5AT	N/A	BELIZE BLUE PEARL	Transferred

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