Dealer Intelligence (DI)

For Product Advisors

SEPT 2012

QUICK REFERENCE GUIDE

DI Reference Guide for Product Advisors

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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.

DI Log In

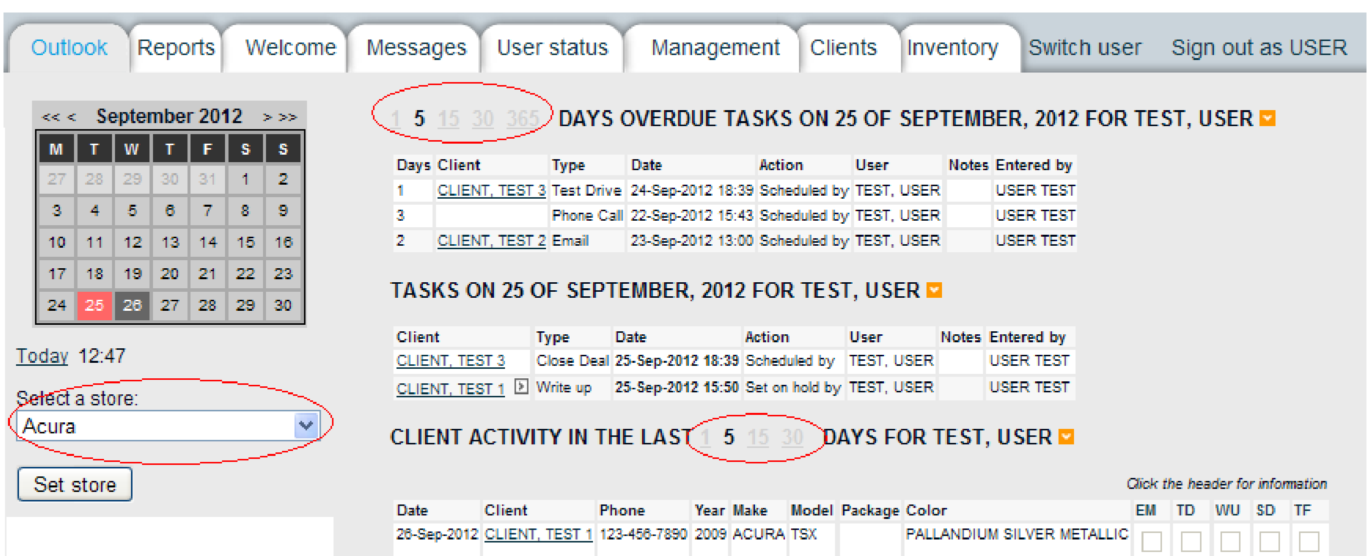
✓ Navigate to the webpage and Log In.

- 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.

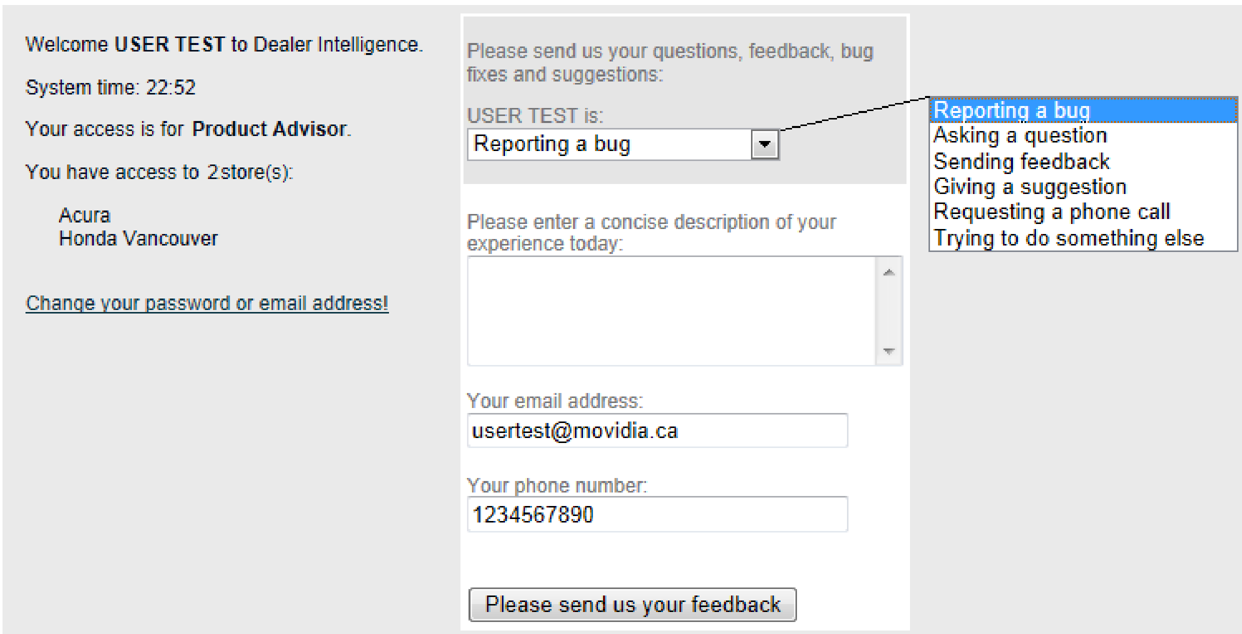


*Users can choose to show tasks and activities for 1, **5**, 15, 30, or 365 days.

Welcome to DI

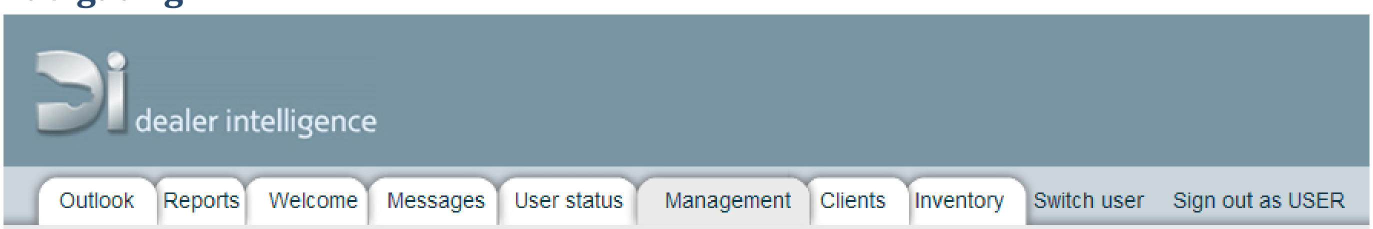
✓ Navigate to the Welcome page by clicking on the “Welcome” tab.

- 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.

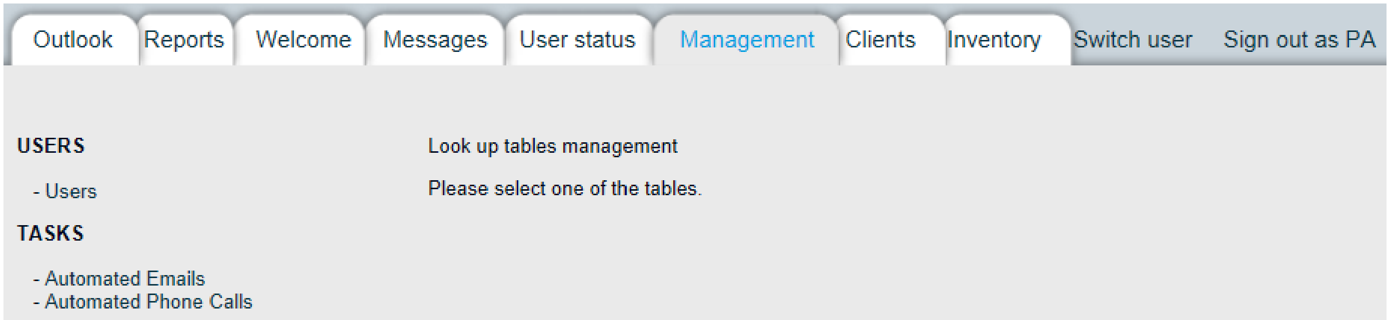
Dealership Inventory

✓ 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**.

PRODUCT ADVISOR SETUP

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

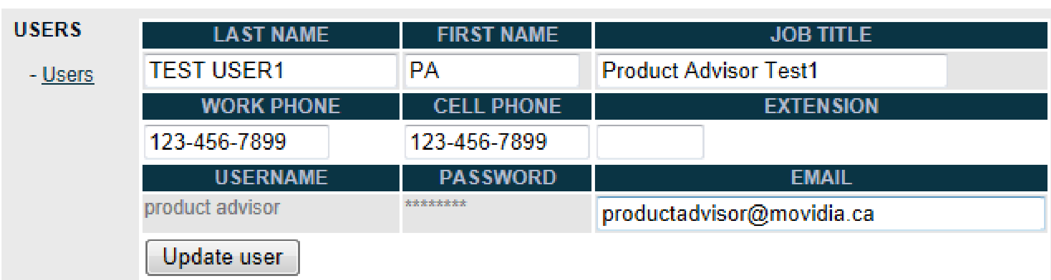


* From the side menu bar, users can update their User Profile, and as well set Automated Email and Phone Call Tasks.

User Profile

✓ Click **Users** and view you're user profile

- If required, make changes by clicking **Edit**.
- Update contact information and click **Update user**.



Product Advisor Automated Settings

✓ Set up customer **Automated Emails**

- Click **Add New Automated Email.**
- Indicate the template to use and the event and time (day/hour after the event) in which to send out the 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 customer **Automated Phone Calls**

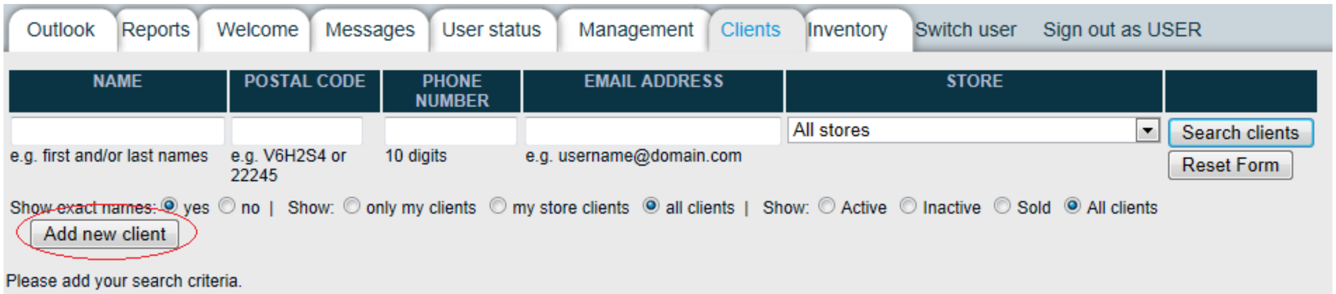
- Set up an automated task reminder for you to make follow-up phone calls to customers.
- Click **Add New Automated Phone Call.** Indicate the event and time (day/hour after the event) in which to set the phone call task.

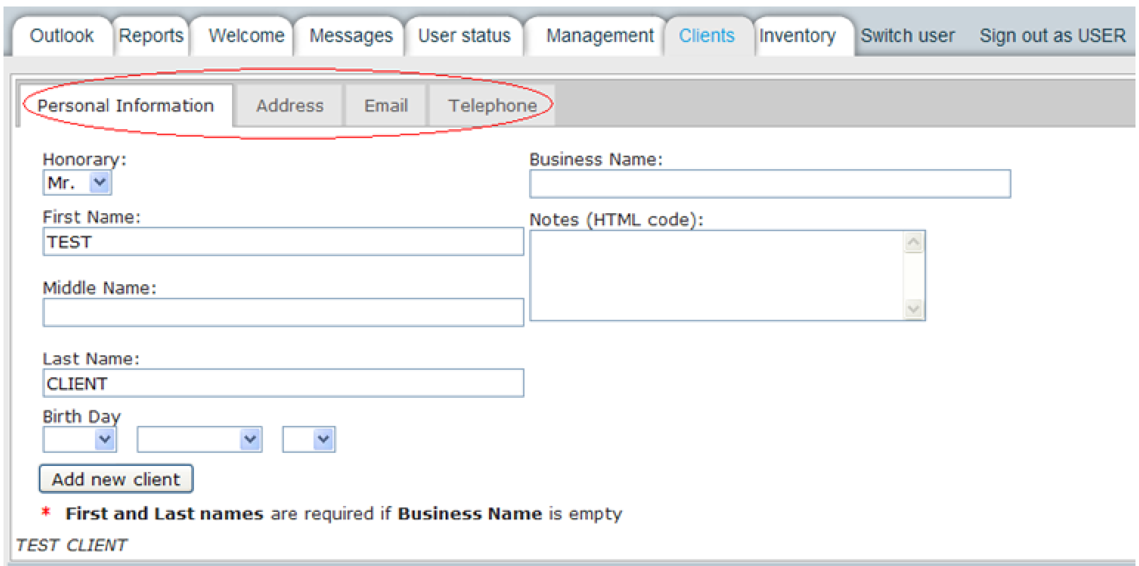
CLIENT MANAGEMENT

How to Create a Customer Profile

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

- Click **Add new client**.





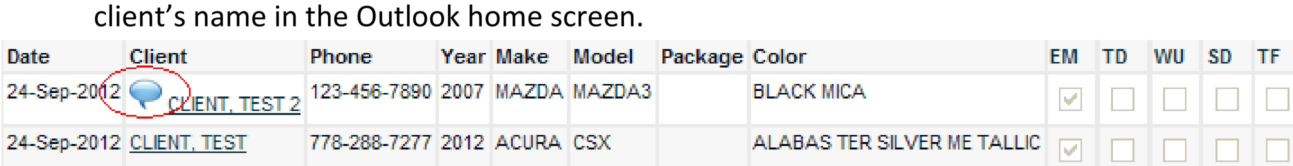
*There are four sections in a Client Profile designated for users to enter basic personal and contact information.

✓ Enter Client’s Personal Information

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

- Add a **note** about the client 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.

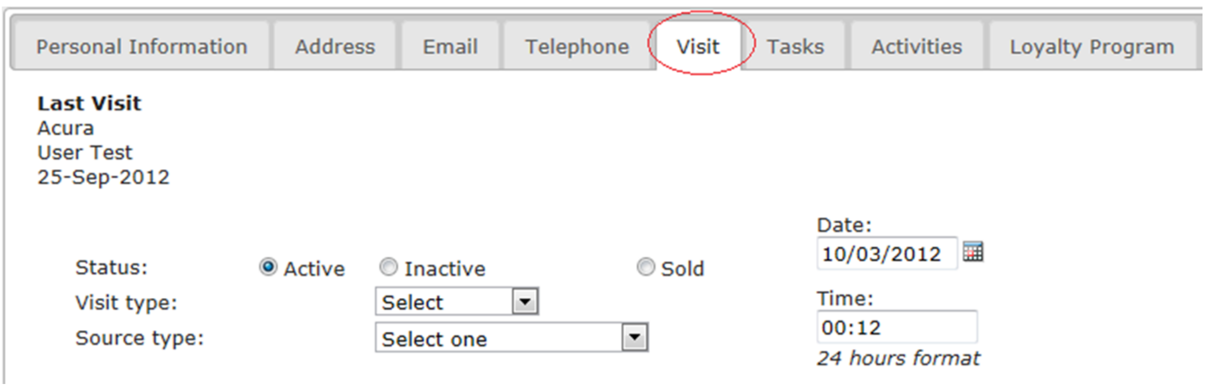
Note: If your client already exists in the database, depending on your store's policies, you may or may not be able to change an existing client's profile within a period of time after the client's last visit. This is to prevent issues from occurring between competing PA's.

✓ Enter Address and Contact Information

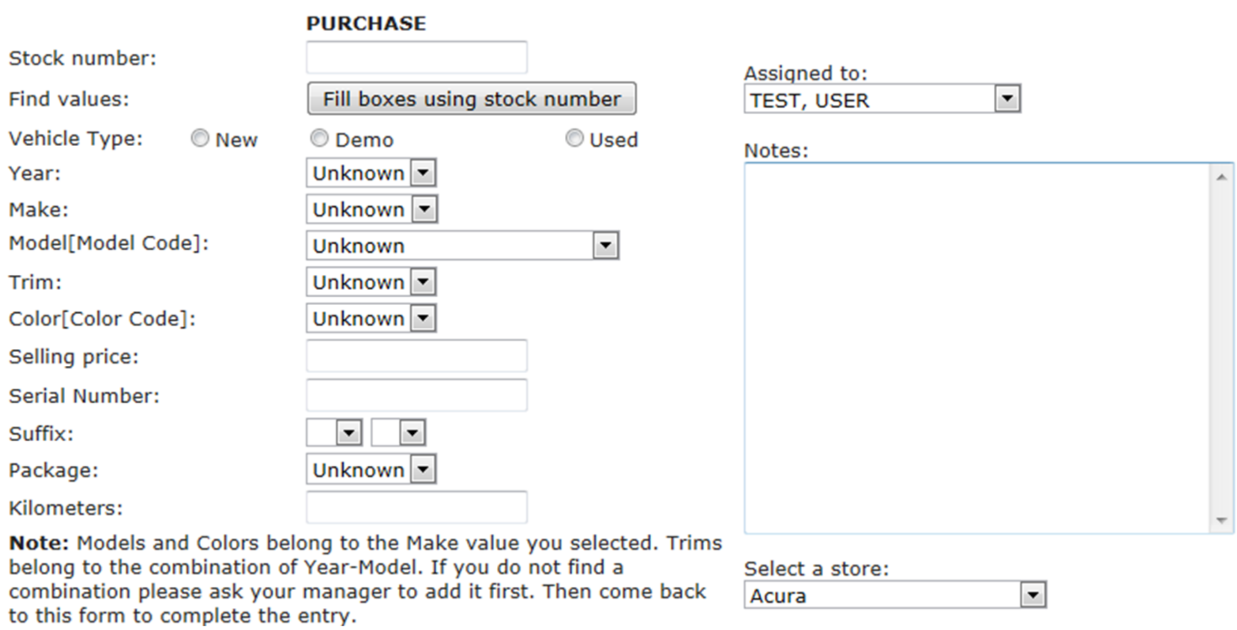
- Select "Address" and input Client Address if available.
    - For customers that do not wish to receive mail, check "Do not receive mail".
- Click **Add new client**. Email, Telephone, and Visit tabs will be displayed.
- Enter client contact information by selecting the "Email" and "Telephone" tabs.
- Click **Update client**.

✓ Create a Visit – record visit details and input client vehicle enquiries by clicking **Add new visit**.

- Indicate visit details.



- Record vehicle enquiry or purchase details.

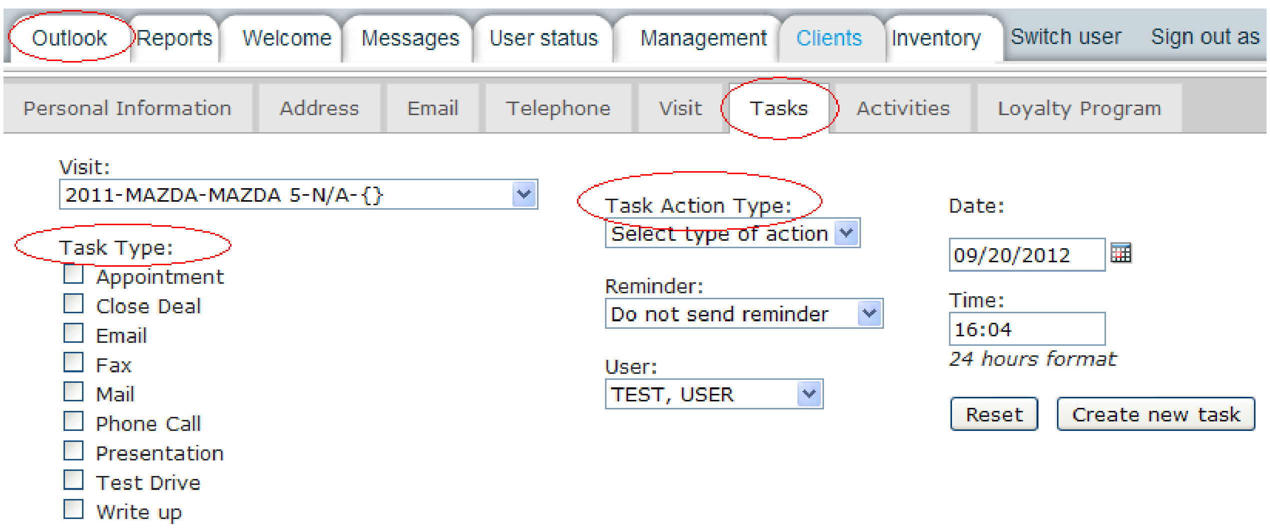


- If applicable, input Appraisal information.
- Click **Create visit**.
    - Repeat to add another vehicle enquiry

  Note: Although some PA's may find it useful to record visit information during their time with customers, PA's have the flexibility to record visit details at a later date. The date and time of visits are adjustable. Also, users can set task reminders for themselves to complete write ups.

✓ Enter a new Task

- The "Tasks" function allows users to set client tasks and reminders for themselves. Once set, these tasks will be displayed in the Outlook home page.
- Start by selecting the "Tasks" tab. Any global and/or store set automated phone call reminders will be displayed here as a scheduled task.
- Enter an additional task or set reminders by clicking **Enter new task**.



*Add multiple tasks at once by selecting more than one Task Type.

✓ Record an Activity – client activities entered here are available for managers to view and transfer to Dashboard.

- Select **Activities,** and then click **Enter new activity**
- 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 Print Dealership 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**.

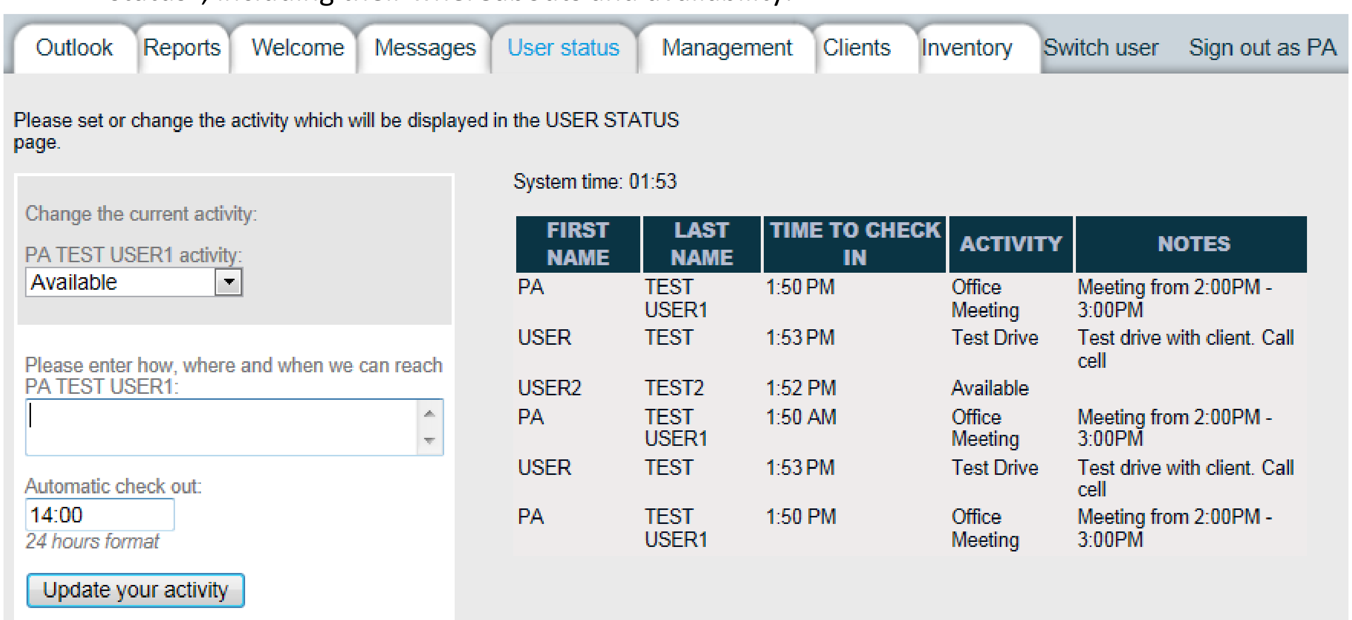
✓ Make changes to Profile

- Edit and click **Update client**.

USER STATUS

How to Update My User Status

- In "User Status", users can broadcast a short message to inform others of their current "status", including their whereabouts and availability.



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

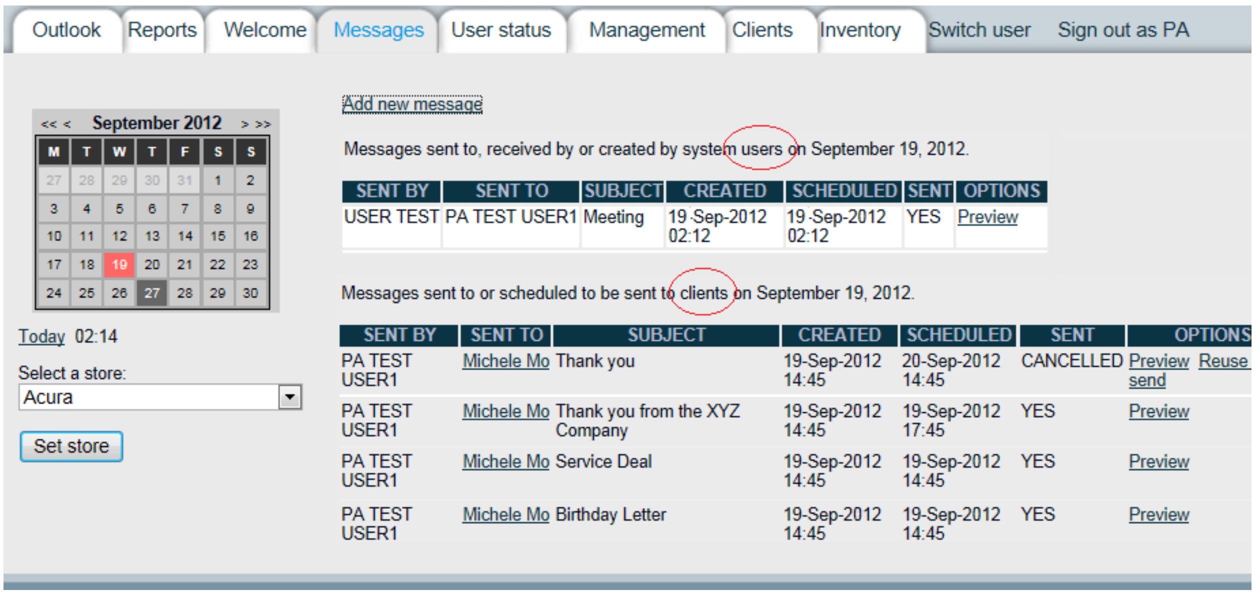
✓ Indicate User Activity

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

✓ Set or update status

- Click **Update** to publish activity.

EMAIL MANAGEMENT



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

How to Send an Email Message

- Under the “Messages” tab from the top menu, click **Add new message**.

✓ Enter a Subject

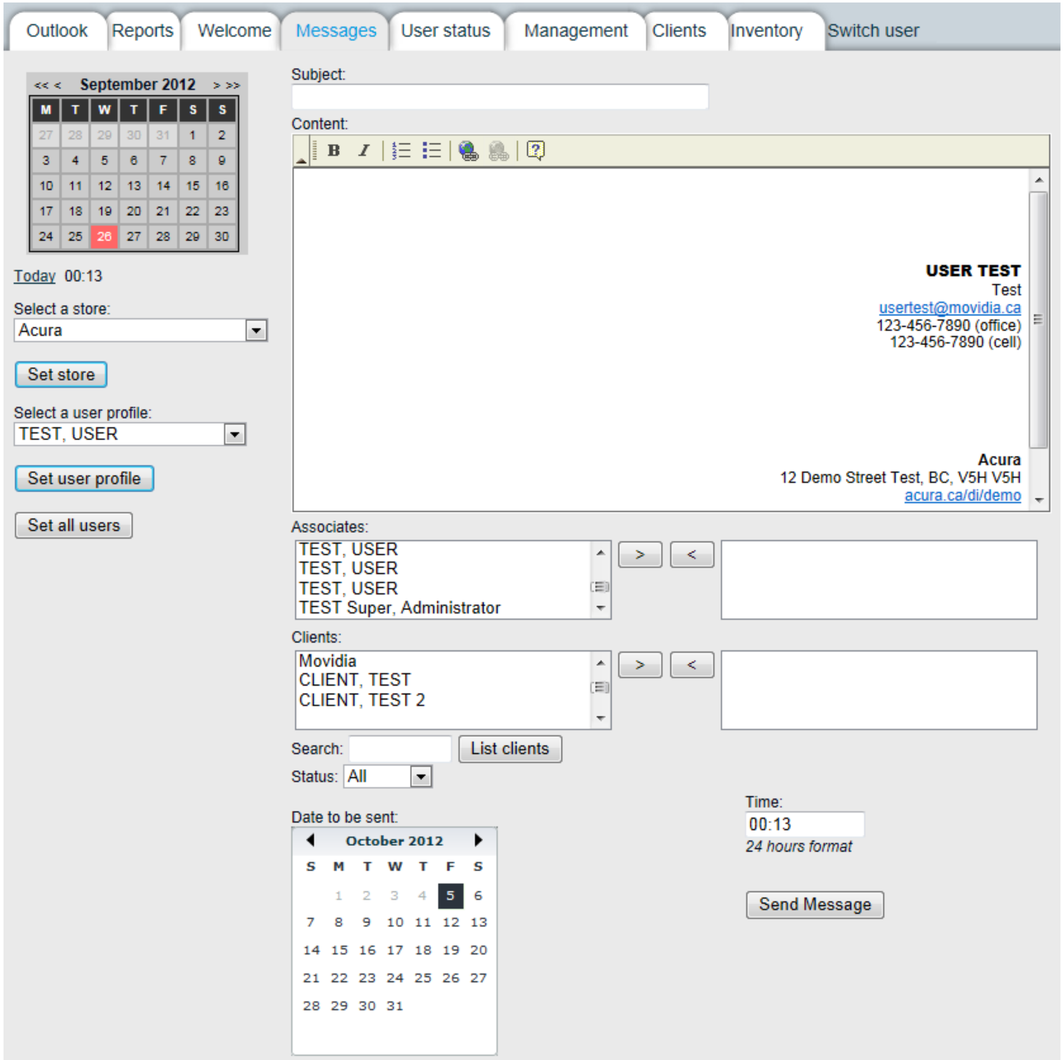
✓ Compose a message

✓ Choose a Recipient(s)

- 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.

CLIENT ENQUIRY REPORTS

How to Generate a Client Enquiry Report

✓ Add Search Criteria

- 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.

✓ Generate a Report

- See which customers have shown interest in, have requested information on, or have purchased a particular vehicle.
    - Use this report to increase sales – target potential customers and market or promote new vehicles and/or special offers.
- 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.