



# Dealer Intelligence (DI)

For Product Advisors

SEPT 2012

# QUICK REFERENCE GUIDE

# DI Reference Guide for Product Advisors

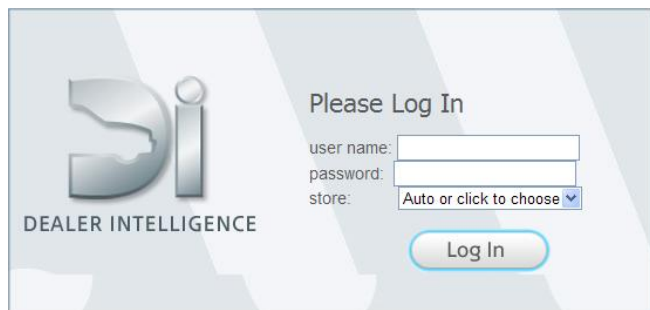
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## GETTING STARTED WITH DEALER INTELLIGENCE

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

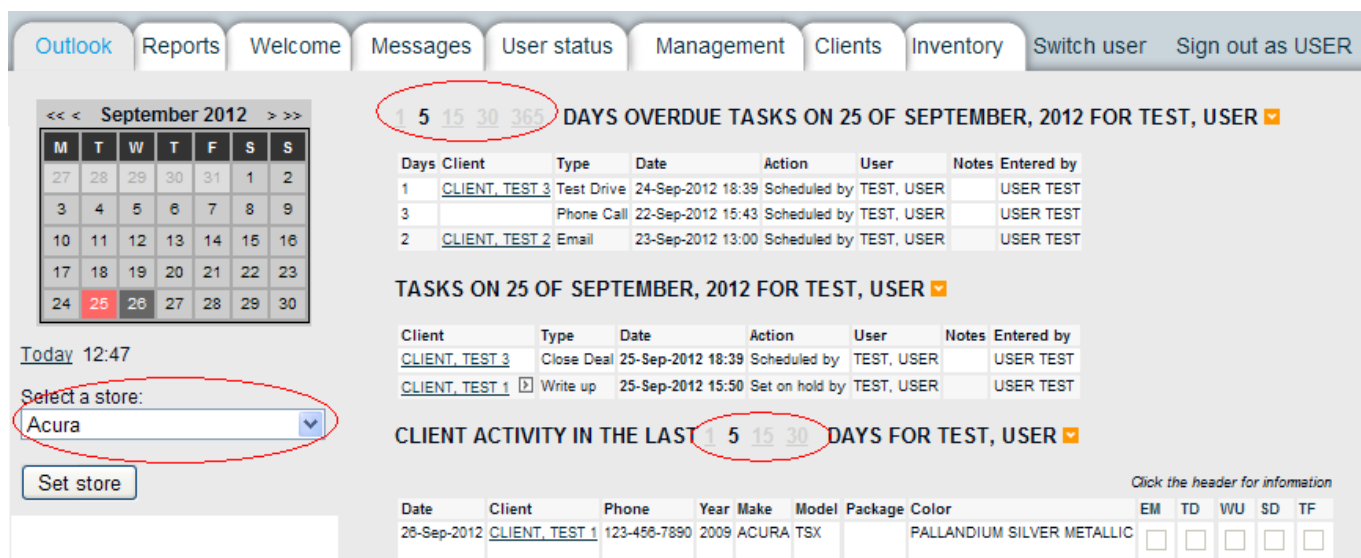
- ✓ Navigate to the webpage and Log In.

The image shows the Dealer Intelligence (DI) login page. On the left is the DI logo with the text "DEALER INTELLIGENCE" below it. On the right, under the heading "Please Log In", there are input fields for "user name:", "password:", and a "store:" dropdown menu with the text "Auto or click to choose" and a downward arrow. Below these fields is a blue "Log In" button.

- 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 image shows the Outlook Home Screen. At the top is a navigation bar with tabs: Outlook, Reports, Welcome, Messages, User status, Management, Clients, Inventory, Switch user, and Sign out as USER. Below the navigation bar is a calendar for September 2012. The 25th is highlighted in red. To the right of the calendar is a section titled "1 5 15 30 365 DAYS OVERDUE TASKS ON 25 OF SEPTEMBER, 2012 FOR TEST, USER" with a dropdown arrow. Below this is a table of tasks. To the left of the tasks table is a "Select a store:" dropdown menu with "Acura" selected. Below the tasks table is a section titled "TASKS ON 25 OF SEPTEMBER, 2012 FOR TEST, USER" with a dropdown arrow. Below this is a table of tasks. To the right of the tasks table is a section titled "CLIENT ACTIVITY IN THE LAST 1 5 15 30 DAYS FOR TEST, USER" with a dropdown arrow. Below this is a table of client activity. At the bottom right is a link "Click the header for information".

| 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 |
|-------------|---------------|--------------|------|-------|-------|---------|---------------------------|----|----|----|----|----|
| 28-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 **Product Advisor**.

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

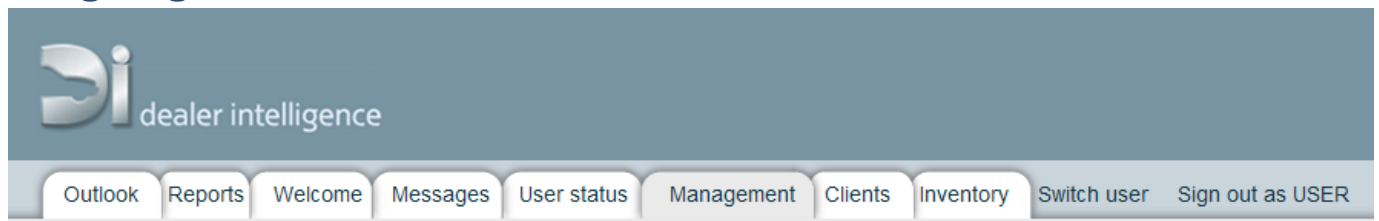
Please send us your feedback

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



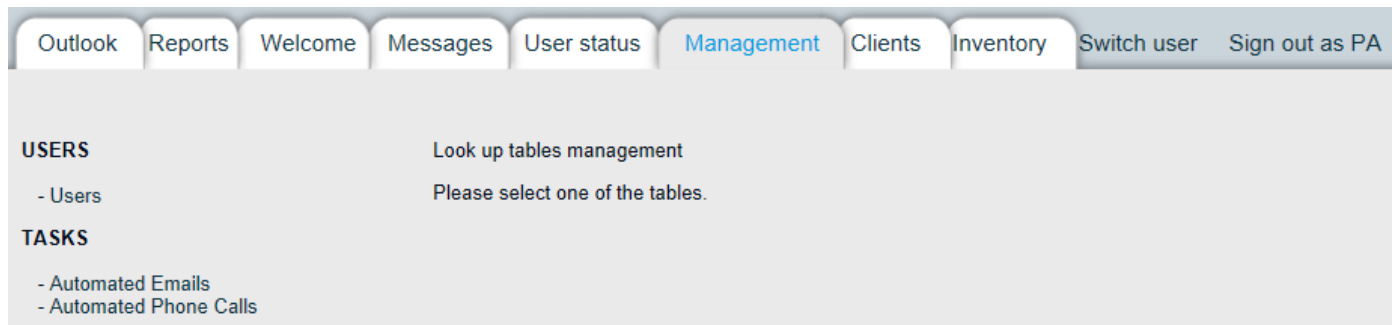
- ✓ Top Menu Tabs
  - The top menu tabs allow users to navigate between the main sections of DI.
  - Switching users and signing out options are also available from this menu.

## 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**.

## 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**.

| USERS                   | LAST NAME                    | FIRST NAME   | JOB TITLE                 |
|-------------------------|------------------------------|--------------|---------------------------|
| - <a href="#">Users</a> | TEST USER1                   | PA           | Product Advisor Test1     |
|                         | WORK PHONE                   | CELL PHONE   | EXTENSION                 |
|                         | 123-456-7899                 | 123-456-7899 |                           |
|                         | USERNAME                     | PASSWORD     | EMAIL                     |
|                         | product advisor              | *****        | productadvisor@movidia.ca |
|                         | <button>Update user</button> |              |                           |

### 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**.

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

| NAME                         | POSTAL CODE          | PHONE NUMBER         | EMAIL ADDRESS            | STORE                |
|------------------------------|----------------------|----------------------|--------------------------|----------------------|
| <input type="text"/>         | <input type="text"/> | <input type="text"/> | <input type="text"/>     | <input type="text"/> |
| e.g. first and/or last names | e.g. V6H2S4 or 22245 | 10 digits            | e.g. username@domain.com | All stores           |

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

**Add new client** Search clients Reset Form

Please add your search criteria.

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

**Personal Information** Address Email Telephone

Honorary:  Business Name:

First Name:  Notes (HTML code):

Middle Name:

Last Name:

Birth Day:

**Add new client**

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

TEST 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                  | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 24-Sep-2012 | CLIENT, TEST                                                                                       | 778-288-7277 | 2012 | ACURA | CSX    |         | ALABAS TER SILVER ME TALLIC | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

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

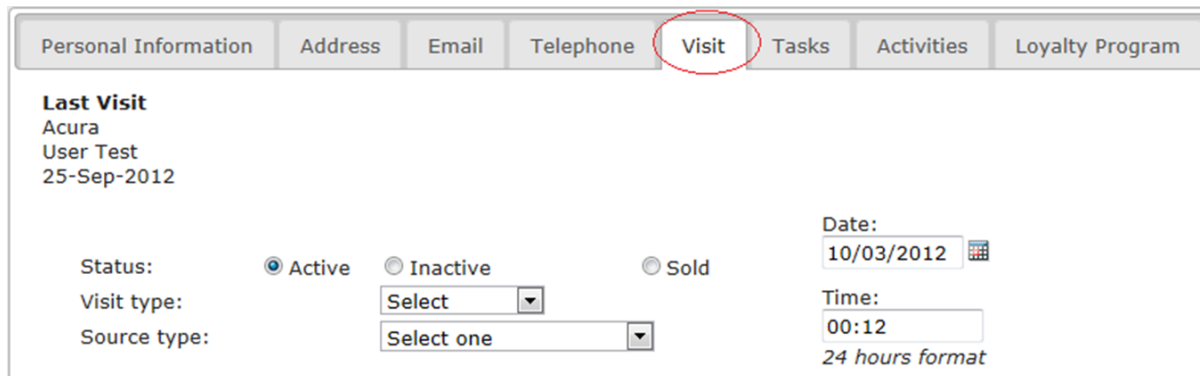
*Note:* If your client already exists in the database, depending on your store's policies, you may or may not be able to change an existing client's profile within a period of time after the client's last visit. This is to prevent issues from occurring between competing PA's.

✓ 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.



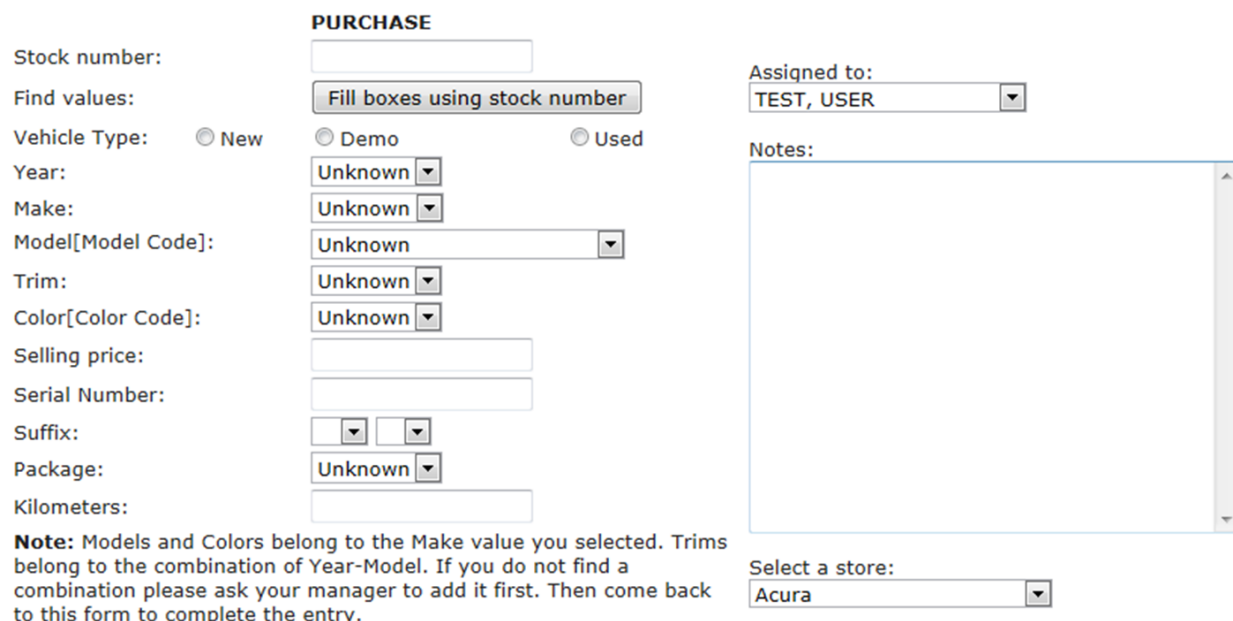
Personal Information Address Email Telephone **Visit** Tasks Activities Loyalty Program

**Last Visit**  
Acura  
User Test  
25-Sep-2012

Status: ☒ Active ☐ Inactive ☐ Sold  
Visit type:   
Source type:

Date: 10/03/2012  
Time: 00:12  
24 hours format

- Record vehicle enquiry or purchase details.



**PURCHASE**

Stock number:   
Find values:   
Vehicle Type: ☒ New ☐ Demo ☐ Used  
Year:   
Make:   
Model[Model Code]:   
Trim:   
Color[Color Code]:   
Selling price:   
Serial Number:   
Suffix:   
Package:   
Kilometers:

Assigned to:   
Notes:   
Select a store:

**Note:** Models and Colors belong to the Make value you selected. Trims belong to the combination of Year-Model. If you do not find a combination please ask your manager to add it first. Then come back to this form to complete the entry.

- 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.

Outlook

Reports

Welcome

Messages

User status

Management

Clients

Inventory

Switch user

Sign out as PA

Please set or change the activity which will be displayed in the USER STATUS page.

Change the current activity:

PA TEST USER1 activity:

Available

Please enter how, where and when we can reach PA TEST USER1:

Automatic check out:

14:00

24 hours format

Update your activity

System time: 01:53

| FIRST NAME | LAST NAME  | TIME TO CHECK IN | ACTIVITY       | NOTES                             |
|------------|------------|------------------|----------------|-----------------------------------|
| PA         | TEST USER1 | 1:50 PM          | Office Meeting | Meeting from 2:00PM - 3:00PM      |
| USER       | TEST       | 1:53 PM          | Test Drive     | Test drive with client. Call cell |
| USER2      | TEST2      | 1:52 PM          | Available      |                                   |
| PA         | TEST USER1 | 1:50 AM          | Office Meeting | Meeting from 2:00PM - 3:00PM      |
| USER       | TEST       | 1:53 PM          | Test Drive     | Test drive with client. Call cell |
| PA         | TEST USER1 | 1:50 PM          | Office Meeting | Meeting from 2:00PM - 3:00PM      |

\* 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

The screenshot shows the 'Messages' tab in a software interface. On the left is a calendar for September 2012 with the 19th highlighted. Below the calendar is a 'Today 02:14' timestamp, a 'Select a store:' dropdown menu with 'Acura' selected, and a 'Set store' button. The main area displays two tables of email messages.

**Table 1: Messages sent to, received by or created by system users on September 19, 2012.**

| SENT BY   | SENT TO       | SUBJECT | CREATED           | SCHEDULED         | SENT | OPTIONS                 |
|-----------|---------------|---------|-------------------|-------------------|------|-------------------------|
| USER TEST | PA TEST USER1 | Meeting | 19-Sep-2012 02:12 | 19-Sep-2012 02:12 | YES  | <a href="#">Preview</a> |

**Table 2: Messages sent to or scheduled to be sent to clients on September 19, 2012.**

| SENT BY       | SENT TO                    | SUBJECT                        | CREATED           | SCHEDULED         | SENT      | OPTIONS                                                            |
|---------------|----------------------------|--------------------------------|-------------------|-------------------|-----------|--------------------------------------------------------------------|
| PA TEST USER1 | <a href="#">Michele Mo</a> | Thank you                      | 19-Sep-2012 14:45 | 20-Sep-2012 14:45 | CANCELLED | <a href="#">Preview</a> <a href="#">Reuse</a> <a href="#">send</a> |
| PA TEST USER1 | <a href="#">Michele Mo</a> | Thank you from the XYZ Company | 19-Sep-2012 14:45 | 19-Sep-2012 17:45 | YES       | <a href="#">Preview</a>                                            |
| PA TEST USER1 | <a href="#">Michele Mo</a> | Service Deal                   | 19-Sep-2012 14:45 | 19-Sep-2012 14:45 | YES       | <a href="#">Preview</a>                                            |
| PA TEST USER1 | <a href="#">Michele Mo</a> | Birthday Letter                | 19-Sep-2012 14:45 | 19-Sep-2012 14:45 | YES       | <a href="#">Preview</a>                                            |

\*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

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](mailto:usertest@movidia.ca)  
123-456-7890 (office)  
123-456-7890 (cell)

**Acura**  
12 Demo Street Test, BC, V5H V5H  
[acura.ca/di/demo](http://acura.ca/di/demo)

Associates:  
TEST, USER  
TEST, USER  
TEST, USER  
TEST Super, Administrator

Clients:  
Movidia  
CLIENT, TEST  
CLIENT, TEST 2

Search:  
Status: All  
List clients

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.

# 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.

**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