
















## Mod 201: Sales Training (Full Version/Desking)















### 2a. Sales Pipeline Summary:

**The Sales Pipeline Summary is located at the top of your Dashboard. The status of all customers on a Sales Pipeline Summary will be Active. Active customers are currently in the market to purchase a vehicle or a brand new internet lead.**

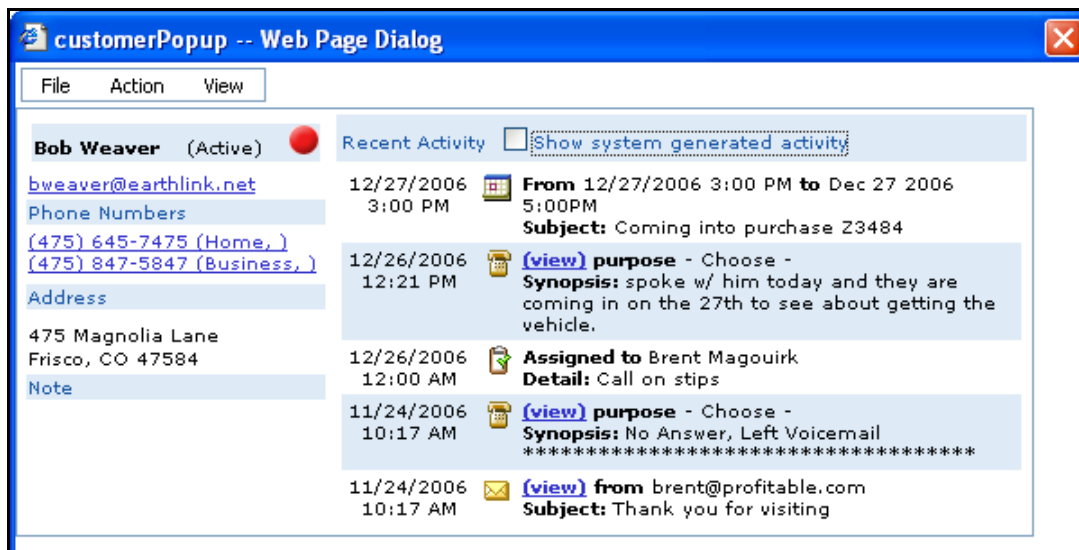
- **Flags:** The first column on the Sales Pipeline Summary is the flags. To help set up your pipeline to provide you with more visibility of your hot customers we have created a Flag icon system. Each flag icon represents where each customer is in the buying process. These customers are then placed in the pipeline according to how they are flagged.
- **Type:** The second column on the Sales Pipeline Summary is the type of customer contact.
  - The person icon  stands for an In-Store lead
  - The world icon  stands for an Internet lead
  - The phone icon  is a Phone lead
- **Clients Name:** In the third column you will find the clients name.
- **Salesperson's initials:** The fourth column is your initials.
- **Date Entered:** The fifth column is the date that the customer was entered into the system. This is the day the last client contact ticket was entered into the system or automatically came into the system as an internet lead.
- **Last Event:** The sixth column is the last event that has happened with this client.
- **Quick Links:** On the right hand side of the Pipeline you will find our Quick Links.      These icons are directly linked to the customer.
  -  Create a Phone Call
  -  Send an E-mail
  -  Create a New Task
  -  Create an Appointment.
  -  Create a New Note or general comment for the customer.

### 2b. Following up your leads from the Sales Pipeline Summary:

**If you would like to follow-up with your daily leads from the Homepage you can view your most current Active leads from the Sales Pipeline Summary. To help set up your pipeline to provide you with more visibility of your hot customers we have created a Flag icon system. Each flag icon represents where the customer is in the buying process. These customers are then placed in the pipeline according to how they are flagged.**

- To view detailed information on a customer account click on the arrowed box to the left of the clients name .
- This will launch a **Customer Pop-Up** window displaying Client Information. This page includes:
  - The Client Menu:
    - File: Where you can edit your clients information
    - Action: Where you can do the following:
      - New: Note, Face-to-Face Note, Email, Tasks, Appointment, Word Document (letter), Credit Application, Client Contact
      - Change the Flag:             

*Note: See your dealership for flag definitions.*
    - View: Where you can refresh the clients information
  - The Client Information Column: This has the customers contact information. You can follow-up with your clients by phone call or email by simply clicking on their phone number or their email address.
  - The Recent Activity Column: This details the last 5 points of contact. The recent activity is chronologically ordered so that the last activity is listed at the top of the column.



## 2c. Create a Phone comment:

You can create a phone comment in the system by clicking on the customer's phone number or by clicking on the Create New Phone comment icon  in the Quick Links Bar.

- When you click on the customer's phone number or the Create New Phone comment icon you will see a phone dialog box appear.
  - **What is the Purpose of the call:** where you can select the purpose of the call from a drop down menu.
  - **Which Number do you wish to dial:** where you can select the number you wish to dial from a drop down menu.
  - **Quick Notes:** If you didn't reach the customer simply select what you did from the drop down menu and click Add. This will create your selection in the notes field and will be your phone comment.
  - **Notes:** If you did reach the customer type the notes you have from your conversation in the notes box.
  - **Are there any Follow-up actions required?:** Once you have finished logging the call you have the option of setting up follow-up actions. To setup a follow-up action click on

the action you would like to perform. The system will open up the specified follow-up action as soon as you save the phone comment.

- **Save:** When you have finished click on Save and Close.

AutoClick Dialog - Microsoft Internet Explorer

**Record a Phone Call**

Make a Phone Call to Terry Green

What is the purpose of this call? - Choose -

Which number do you wish to dial? -Choose-


-Quick Notes- Add

Are any follow-up actions required?

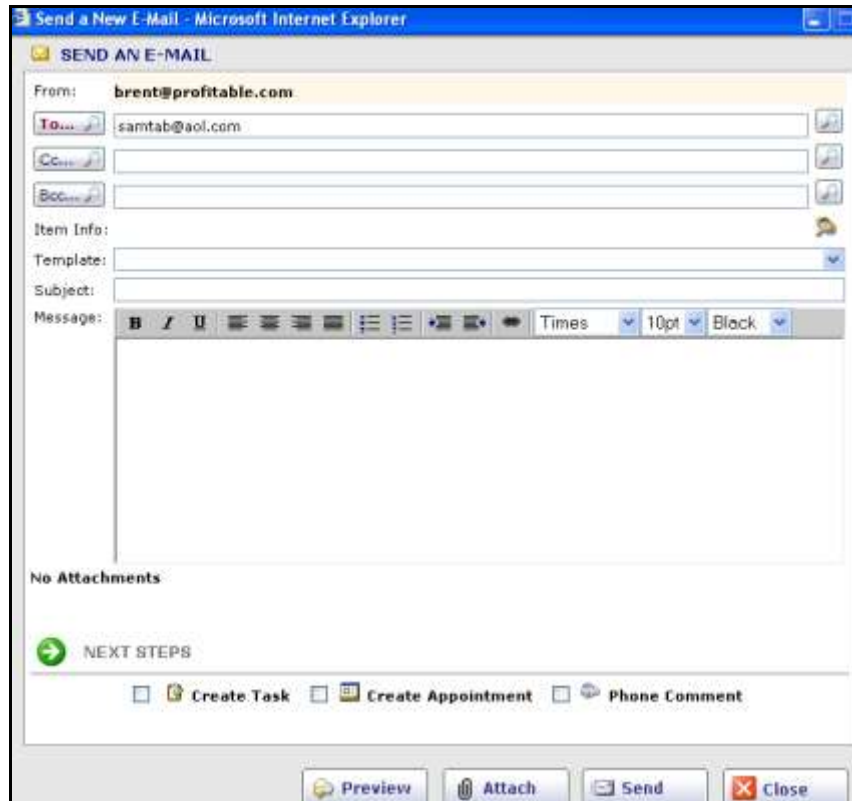
[Send an Email](#) [Schedule an Appointment](#) [Create a Task](#)

Save Save/Close Cancel

## 2d. Create an e-mail:

You can create an e-mail in the system by clicking on the customer's e-mail address or by clicking on the Create New E-mail icon  in the New or Quick Links Bar.

- When you click on the customer's e-mail address or the Create New E-mail icon you will see a Send a New E-mail box appear. Unless you are using the e-mail icon in the New Bar, the e-mail will be pre-addressed to the client. You have two options for creating an email:
  - **Write your own e-mail:** by entering a subject and writing a message
  - **Choose from an existing template:** To choose a pre-made template select one from the template drop down. You can find these listed under Templates.
- **Click send** when you are ready to send your e-mail.
- You will see a **Mail Sent** confirmation at the top of the window when completed.
- **Click close** when you have confirmation the email has been sent.



## 2e. Edit the Clients Information:

You can edit the client's information by clicking on Edit anywhere in the system.

- In the Customer Pop-Up Screen click on File and select Edit to open the window.
- In this window you will be presented with all your customers' data in fields which can be edited.
- To edit type in the information you would like to add or change in the proper field.
- Click **Save and Close** at the bottom of the screen to save your data and close the window to return to your main page.

Editing Terry Green - Microsoft Internet Explorer

**EDIT CLIENT**

**Personal Information:**

First Name: Terry  
 Middle Name:   
 Last Name: Green  
 Title:   
 Company: Sears  
 Salesperson: Gaskill, Don  
 Status: Active  
 S.S. #: 123 - 45 - 6789  
 D.L. #:   
 Birthdate: 01/14/1954  
 Anniversary:   
 Credit Score: N/A **NEW**  
 Follow-up:  No Sold Follow-up  
 No Un-Sold Follow-up

**Home Address:** Copy To Mailing Address  
 Street 1: 33 West Wind Blvd  
 Street 2:   
 City: Dayton  
 State: OH  
 Postal Code: 43956

**Mailing Address:** Copy To Home Address  
 Street 1: 33 West Wind Blvd  
 Street 2:   
 City: Dayton  
 State: OH  
 Postal Code: 43956

E-mail Address: tgreen01@waldorph.com

**Phone Numbers:**

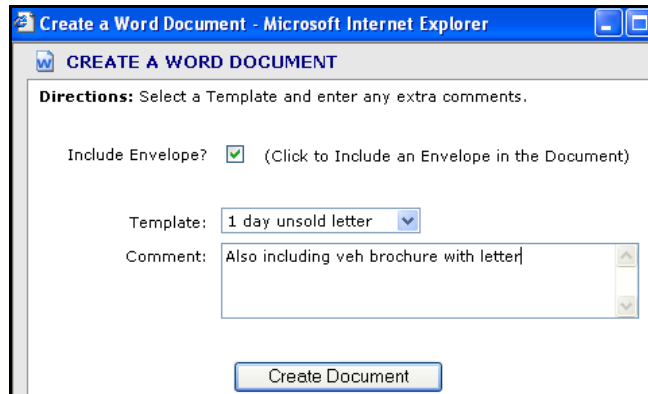
	Extension	Best time to call:
Home: (489) 578-5857		Evening
Business: (945) 785-8578		Day
Fax:		(-Select-)
Mobile: 489-331-7511		Anytime
Pager:		(-Select-)

Note:  
 He likes Roller Derby and is on the committee to rebuild Cole Park.

## 2f. Create a Letter:

You can create a letter by clicking on **Create New Word Document** anywhere in the system.

- Select Create Word Doc
  - The first option you are presented with is a check box to decide if you would like to include an envelope. This is only if you have a printer that is set up for printing envelopes. Check with others in your dealerships if you are unsure if your printer is set up properly.
  - Next select a template from the drop down menu
  - If you would like to create a comment for your own records regarding this letter do so in the comment box now.
  - Lastly click on create document.



- If a Windows Pop-up box appears asking if you want to Save or Open the document, select to open it.
- The next screen will have your envelope and letter in Microsoft Word formatting. You are able to make any changes or additions to the letter at this time.
- When you are ready click on the printer icon or File -> Print to print the envelope and letter.
- Close document to return to the main page.

## 2g. Flags Icons

**Remember:** To help set up your pipeline to provide you with more visibility of your hot customers we have created a Flag icon system. Each flag icon represents where each customer is in the buying process. These customers are then placed in the pipeline according to how they are flagged.

- To change the Flag icon associated with your customer from the Customer Pop-up Window Go to Actions and choose Change Flag
- Choose the flag icon that best represents the status of the customer within the buying process.



*Note: See your dealership for flag definitions.*

## 2h. Sorting the Sales Pipeline Summary

**Remember:** The flag icon represents where each customer is in the buying process. The Sales Pipeline Summary is defaulted to order according to how they are flagged. You can also sort the Pipeline Summary by clicking on any of the Headings at the top of each column.

- To sort by the date the customer was entered into the system click on Date Entered in the heading column of the Sales Pipeline Summary.
  - By clicking on Date Entered Once the customers will order from the oldest to the newest customer.
  - By clicking on Date Entered Twice the customers will be ordered from the newest customer to the oldest. *Note: The Contact Log is defaulted to show the last 7 days of client contact tickets with the newest one at the top.*
- Additional Sort Options at the top of the page are Type of Client Contact and Client Name.
- To provide a more efficient way for you to search, we have designed the Pipeline summary to display only 100 active clients at a time. This will prevent you from searching through multiple screens. To

insure this process remains a benefit you will need to flag clients that are no longer in the market to purchase a vehicle with an inactive flag to make room for you new Active clients.

## 2i. Client Information Screen:

**By clicking on the Clients name you will be taken to the Client Information screen. In this screen you can view all of the customer details and their complete client history.**


- **Create A Phone Comment:** On the Client Information screen you can record a phone call by clicking on the client's phone number.
- **Create An E-Mail:** Create an E-mail by clicking on the clients email address.
- **Flag the Client:** Open up the flag drop down menu and selecting a new flag.
- **Client History:** At the bottom of the Client Information Screen you can view the customers complete Client History. This is chronologically ordered so that the last thing that happened with the customer shows at the top of the list.
- **Actions Menu:** In the Actions menu in the top right hand corner of the screen you can Edit your Client, Create a New Comment for your Client, Create a New Face-to-Face comment for your client, Create a New Word document for your client, Create a New Appointment for your Client, Create a New Task for your Client.

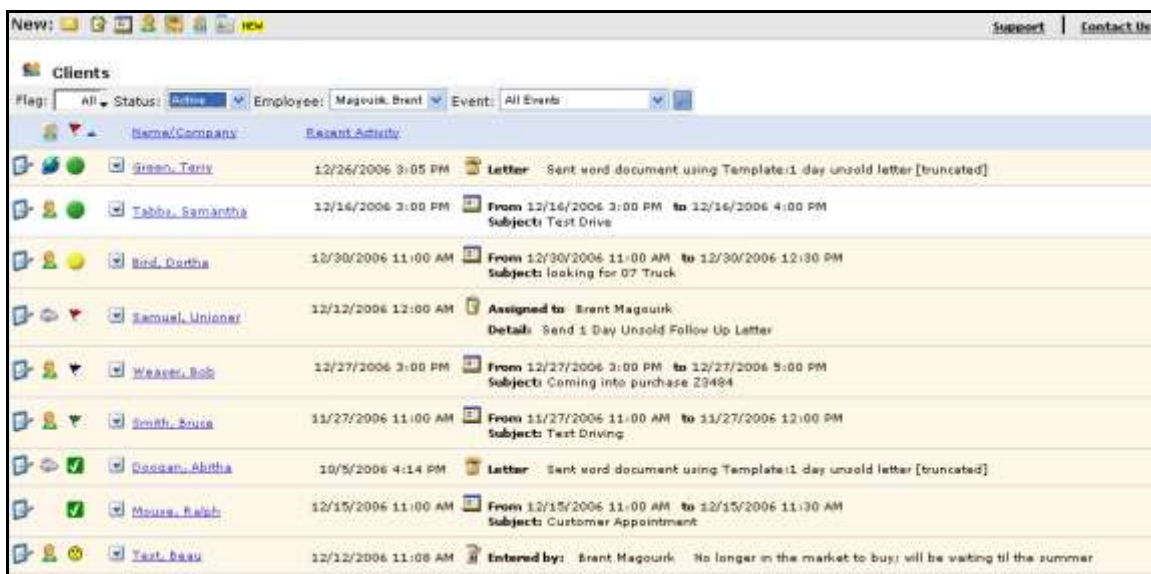


## 2j. Clients Section on the Navigate Bar:

**This is the only place in the system where you are able to view your Managed, Dropped and Inactive Clients. To view these clients:**

- Click on Clients from the Navigate Bar.
- All Active Clients records will be displayed
- Select the status you would like to view from the Status drop down menu.
  - **Active Clients:** Currently in the market to purchase a vehicle.
  - **Inactive Clients:** Customers that are not currently in the market to purchase a vehicle but are kept in the system for future buying potential.
  - **Managed Clients:** Inactive Clients that need to be followed-up with.
  - **Dropped:** Customers you do not wish to work with again.

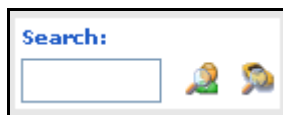
- Click the search icon  .
- You also have access to your Customer Pop-Up box.
- You can directly edit your Client Information by clicking on the Edit icon.
- You can view your Contact Type e.g. Internet, Phone-up and Walk-in.
- See the Flags associated with your clients.
- View your Customers Name.
- You are able to sort by column headings.




## 2k. Search the Database:

**Search the Database for a customer:** You are able to search for clients in the database by using the Search Bar located in the top left hand corner of your screen. This is accessible from every screen in the Autoclick system. There are 2 ways you can search for a customer in the system.


- Do a Quick Search by Searching for a customer by their last name:
  - Type the clients last name into the search bar



- Click on the client Search icon to the right of the last name 
- You will see the client search pop-up box.
  - Note: if only one customer in the database matches your search criteria you will automatically be taken into their client information screen and the pop-up box will be minimized at the bottom of your screen.
- In the pop-up box you will see a list of clients matching your last name search criteria.
- To select a client from the search results click on the client's name. This will take you to their client information screen.
- **If the customer is not in the search results:**



- Delete the last name from the search criteria field above
  - Enter in new search criteria and click on Search.
- To select a client from the search results click on the client's name. This will take you to their client information screen.
- If the customer is still not showing in the results it could be that they may not have been entered into the system and will need to be created at this time.

 **SEARCH FOR A CLIENT**

Salesperson:  Status:  Flag:


First Name:  Last:

Company:

City:  State:  Zip:

E-mail:


Client	Company	Email	Salesperson
Alison Meyer		Alimay_73@yahoo.com	smith, tj
GARY MEYER		shawn@columbus.autoclick.com	Dinant, Cheryl
Travis Meyer		shawn@columbus.autoclick.com	Test, Joe
Mike Meyers		mike@aol.com	Lawson, Hank


- Do an advanced Search for a customer with their detailed information:
  - In the Search Bar leave the box blank and click on the client Search icon on the right hand side 
  - You will see the client search pop-up box
  - Fill in your search criteria and click Search
    - *Note: if only one customer in the database matches your search criteria you will automatically be taken into their client information screen and the pop-up box will be minimized at the bottom of your screen.*
  - To select a client from the search results click on the client's name. This will take you to their client information screen.
  - If the customer is not showing in the results it could be that they may not have been entered into the system and will need to be created at this time.

**Search the database for a vehicle:** You are able to search for vehicles in the database by using the Search Bar located in the top left hand corner of your screen. This is accessible from every screen in the Autoclick system. There are 2 ways you can search for a vehicle in the system.



- Do a Quick Search by Searching for a Vehicle by its Stock Number.
- Type the stock number of the vehicle into the search bar




- Click on the vehicle Search icon to the right of the stock number 
- You will see the item search pop-up box.
  - Note: if only one vehicle in the database matches your search criteria you will automatically be taken into the vehicle information screen and the pop-up box will be minimized at the bottom of your screen.
- In the pop-up box you will see a list of vehicles matching your stock number search criteria.
- To select a vehicle from the search results click on the stock number. This will take you to the vehicle information screen.
- **If the vehicle is not in the search results:**
  - Delete the stock number from the search criteria field above
  - Enter in new search criteria and click on Search.
- To select a vehicle from the search results click on the stock number. This will take you to the vehicle information screen.
- If the vehicle is still not showing in the results it could be that it may not have been entered into the system and will need to be created at this time.

 **FIND AN ITEM**

Source: <- Select A Source -> <input type="button" value="v"/>	Transmission: <input type="checkbox"/> Automatic <input type="checkbox"/> Standard
Status: <- Select A Status -> <input type="button" value="v"/>	Speeds: <- Select Speeds -> <input type="button" value="v"/>
Classification: <- Select A Class -> <input type="button" value="v"/>	Transaxle Type: <- Select A Transaxle -> <input type="button" value="v"/>
Stock #: p125	Engine: <input type="checkbox"/> Gas <input type="checkbox"/> Diesel
Year From: <- Year -> <input type="button" value="v"/> To: <- Year -> <input type="button" value="v"/>	Engine Size: <- Select Cylinders -> <input type="button" value="v"/>
Make: <-Manufacturer-> <input type="button" value="v"/>	Condition: <- Condition -> <input type="button" value="v"/>
Model:	Interior Trim: <- Select A Trim -> <input type="button" value="v"/>
Model Code: <input type="text"/>	Exterior Color: <input type="text"/>
VIN: <input type="text"/>	
Mileage (less than): <input type="text"/>	

Stock #	Year	Make	Model	Color	List Price	Age>	Status	Dealership
 P125	2006	CADILLAC	ESCALADE	■	\$36500	0	Sold/Delivered	AutoClick Training Dealership
 P125A	2004	BENTLEY	AZURE	■	\$17500	0	Stock	AutoClick Training Dealership

- Do an advanced Search for a vehicle with its detailed information:
  - In the Search Bar leave the box blank and click on the vehicle Search icon on the right hand side 
  - You will see the item search pop-up box.
  - Fill in your search criteria and click Search
    - *Note: if only one vehicle in the database matches your search criteria you will automatically be taken into the vehicle information screen and the pop-up box will be minimized at the bottom of your screen.*
  - To select a vehicle from the search results click on the stock number. This will take you to the vehicle information screen.
  - If the vehicle is still not showing in the results it could be that it may not have been entered into the system and will need to be created at this time.