Daily Traffic Control Log

User Instructions

Name: ____________________________
Printed December 2012.
This Instruction manual has been written to accompany the Quality Care - Sales Daily Traffic Control system
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Introduction
Welcome to the Quality Care - Sales Daily Traffic Control website – everything you need to know about this service is right here.

Who can register on this system?
The registration level within the Quality Care - Sales Daily Traffic Control system is:

- Dealership Administrator
  NOTE: The person who registers a new Dealership will always have the user type of Company Administrator.

Who can use this system?
The people who can use the Quality Care - Sales Daily Traffic Control system are:

- Company Administrator
- Data Entry Operator
- Group Leader
- Sales Consultant
- Admin Support

What will this system do for my Dealership?
The Quality Care - Sales Daily Traffic Control system will help Dealership Administrators and Company Administrators to carry out these tasks:

- Setup branches
- Register users
- Enter prospect data
- Set monthly sales targets
- Modify registration and user details
- View and print reports.

Terms and Conditions?
The first time each new user logs in to the Quality Care - Sales Daily Traffic Control system, that person will need to read and accept the Terms and Conditions for using the system.

Is my commercial data safe?
Totally. Only individual Dealerships have access to their own data. All Dealership details are kept strictly confidential, and compartmentalised.

How are Data Entry Operators and Sales Consultants registered?
Data Entry Operators and Sales Consultants are added to the database by a registered user with Company Administrator status.
Selecting a Language

The **Quality Care - Sales Daily Traffic Control** system has been developed to support multiple languages. When you first enter the system the home page will display the flags of the languages that the system supports as illustrated in Figure 1.0.

![Figure 1.0 The flags that appear on the home page indicate the languages supported](image)

To select a language, you simply need to click on the relevant flag and the screen will automatically be translated to the language selected as illustrated in Figure 1.0a below.

![Figure 1.0a If you select Thai, the system will be translated to Thai](image)
1. Registering a Dealership

The *Quality Care - Sales Daily Traffic Control* system needs to be set up and controlled by a Company Administrator. The first time you enter *Quality Care - Sales Daily Traffic Control* you will need to register your Dealership and enter your details as the prime user of the system. This initial registration process will give you full access to the system with Company Administrator status. On the second and subsequent times you enter the system, you will need to identify yourself using the username and password you chose during the initial setup.

Logging on the first time

There are two activities to carry out the first time you logon to the *Quality Care - Sales Daily Traffic Control* system:

- Register your Dealership details
- Enter your user details.

Entering the system

1. To enter the Ford Traffic Monitor system you will need to open a Web browser and type the following address into the Address line at the top of your browser.
2. Enter http://www.qcsford.com in your browser address line as shown in Figure 1.1.
3. This will display the *Quality Care - Sales Daily Traffic Control* system Home page (Figure 1.2).
Registering your Dealership
To register your Dealership you need to enter information on two pages. This process includes these steps:

- entering Dealership details
- entering your Company Administrator details

Entering Dealership details
To register with the Quality Care - Sales Daily Traffic Control system follow these steps:

1. On the left side of the Quality Care - Sales Daily Traffic Control Home page you will see three links (Figure 1.3).

2. Select **Register New Client** by clicking it once. This will open the Terms and Conditions screen (Figure 1.4).
3. Read the information on the Terms and Conditions screen. When you are ready, click **Continue** to open the Dealership Registration screen (Figure 1.5).

![Dealership Registration](image1)

**Dealership registration process**

You will need to enter your Dealership details on this screen.

4. Complete the details and click **Continue** to display the User Registration screen (Figure 1.6) where you will enter your personal details.

![Register User](image2)

**Figure 1.5**
Enter your dealership details before continuing

**Figure 1.6**
Enter your personal user details on this screen
5. Enter your personal details on the User Registration screen and click **Continue**. You will be directed to the Subscription Registration screen where you will need to identify yourself as a Dealership Administrator (Figure 1.7). **NOTE:** Please ignore the reference to **Project Administrator**. This is the wrong choice for Dealerships.

**NOTE:** Once you have registered and logged in to Ford Traffic Monitor, you will be able to review your Subscription level and the Terms and Conditions statement. Do this by opening the Registration item on the main menu by clicking the plus (+) sign, and choosing one of the sub-menu items.

![Figure 1.7](image)

Select Dealership Administrator on this screen to identify your registration level

6. When you have selected Dealership Administrator, click **Continue** to display the Thank you for Registering message (Figure 1.8).

![Figure 1.8](image)

**Figure 1.8**

**Thankyou For Registering**

The registration process is complete. Your registration will be reviewed and your company should be enabled shortly. Once you receive notification that your company has been enabled, you may login by clicking the login link on the left menu. Please use your username and password entered during the registration process.

7. Read the information on the Thank you for Registering message carefully. **NOTE:** Your registration will be reviewed by a Project Administrator. When the Project Administrator has checked that all details of your registration are correct, you will receive an email to advise you that you are now cleared to logon to the **Quality Care - Sales Daily Traffic Control** system.

**Logging on to the Quality Care - Sales Daily Traffic Control system**

Once you have received your email advising that your Dealership is now registered, open the system and select Login from the main menu to open the **Login** screen (Figure 1.9).

If your new password does not work, make sure you have entered it in a case sensitive manner – for example ‘b’ and ‘B’ will be read differently.
Once you have received your email advising that your Dealership is now registered, open the system and select Login from the main menu to open the Login screen (Figure 1.9).

If your password is still not working, and you are getting a message which says ‘account disabled’ (see fig 1.10) your account has been locked for security reasons and will need to be ‘unlocked’ by your Dealership Company Administrator. Please refer to Section 2 of this guide (fig 2.5d) for further information on unlocking locked accounts.

Forgotten your password

If you have forgotten your password click the Forgotten Password link to open the Forgotten Password screen (Figure 1.11) where you will enter your username and click. Your password will be emailed to you.

Registering for Used Vehicles

If you are authorised to register for ‘used vehicles’, click on the ‘Register for Used Vehicles’ link under the setup menu (Figure 2.1) and follow the instructions on the screen. You will be notified by email when your request has been processed. Full details are included in the separate ‘Used Vehicle User Instructions’ guide available from your QC-S Coach or Download from the QC-S Web Portal FAQ section.
2. Company Administrator tasks

Once you have logged in successfully as a Company Administrator, you will see an extended menu on the left side of the screen (Figure 2.1). As a new user there are two tasks that must be undertaken before your Dealership can begin using the **Quality Care - Sales Daily Traffic Control** system.

Those two tasks are:

- Setup
- Data Entry.

**Setting up branches and users**

The first task is to set up at least one QC-S authorised branch in the system and then add users to the list for each branch.

**Adding a branch to the Quality Care - Sales Daily Traffic Control system**

1. Click the plus (+) sign to the left of Setup on the main menu to expand that menu item. You will now see displayed the five sub-menu items:
   - Dealership
   - Branches
   - Group Users
   - Groups
   - Users

**NOTE:** the Dealership item will display the information you entered about your Dealership when you first registered.

2. Click Branches to open the Branches list screen (Figure 2.2). At the top of the screen is a Search facility that you will not use until you have a long list of branches and want to narrow your search.

![Figure 2.1](image1.png)

**Figure 2.1**
The Setup menu contains five items. The Dealership item displays the information entered during registration. You need now to enter a branch and at least one user for this branch. Other users can be entered by the Branch Manager.

![Figure 2.2](image2.png)

**Figure 2.2**
The Branches screen does not yet contain any branches for your dealership. Click Add to enter the details of your first branch in this system.
3. You will see that there are no branches in the list at the bottom of the screen so click Add to add your first branch for this Dealership. This will open the Branch details screen where you will enter the information for this branch (Figure 2.3). Once you have entered a branch it will appear in this list.

![Branch details screen](image)

**Figure 2.3**
Complete the details of the branch on this screen.

4. Complete the details of the branch and click **Save** to save the details of this branch in the database. This screen will close and you will be taken back to the Branches list screen where you can now see the name of the branch you have just entered in the list. (Figure 2.3a)

![Branches list screen](image)

**Figure 2.3a** The list of Branches currently created in the system.
Deleting a branch from the Quality Care - Sales Daily Traffic Control system

1. Click the plus (+) sign to the left of Setup on the main menu (Figure 2.1) and click on Branches to display the Branches page (Figure 2.3a)
2. Click on the Delete hyperlink next to the Branch to be deleted
3. A dialogue box (see Figure 2.3b) will be displayed requesting the user to confirm the deletion

Figure 2.3b A dialogue is displayed to confirm the deletion of the branch

NOTE: If a Branch has an associated Monthly Sales Target record or Prospect data Record it cannot be deleted

Adding users

There are four different user types. The Dealership Company Administrator must select which type to add a user as, for example, either:

- Company Administrator, or
- Data Entry, or
- Group Leader, or
- Sales Consultant, or
- Admin Support

Note: Users are automatically allocated to a branch when you set their monthly Sales target or update a prospect record

A description of user type functionality is summarised in Fig. 2.5a

Company Administrators

These people have full control of the system. Their tasks are:

- Register the Dealership in the Quality Care - Sales Daily Traffic Control system including entering full Dealership details.
- Register themselves as users of the system. Their registration will automatically include full Company Administrator rights.
- Set up Quality Care - Sales branches and Groups (if applicable) within the system.
- Enter at least one user at Company Administrator level in each Quality Care - Sales branch.

The Dealership Administrator can enter users to the system.

To create a new user:

1. Click Users to display the User list screen (Figure 2.4). As with the Branches screen when you first opened it, there are not yet any users in the list. The Search facility at the top of the screen can be used to shorten your search when you have a long list of users on this screen.
**Daily Traffic Control Log**

**Figure 2.4** The Users list only includes your details that were entered during the registration process. Click Add to add more users.

![Users Table]

2. Click *Add* to display the Users details screen (Figure 2.5). On this screen you will add the details of the user you are adding to the database for the branch you have just created.

![User Details](image)

**Figure 2.5** Enter the details of a second user to the system. Choose the level of access for this user.

3. Note that you will need to enter a user name and password for this person. When the users you create log in, they can change their username and password if they wish.

4. Note also that you need to indicate a user role for the user you are creating. Only click Company Administrator if you want this person to assume full responsibility within the system.

Select either:

- **Company Administrator** (tick the ‘Company Administrator’s AND ‘enabled’ check box’s)
- **Group Leader** (tick the ‘Group Leader’ check box)
  
  Additionally the Recover Prospects (tick the ‘Recover Prospects’ check box) is only available for Group Leaders and allows Company Administrators to delegate the recovery of deleted prospects belonging to Sales Consultants from within their group

- **Data Entry** (tick the ‘Data Entry’ AND ‘enabled’ check box’s)
- **Sales Consultant** (only tick the ‘enabled’ check box)
- **Admin Support** (tick the ‘Admin Support’ AND ‘enabled’ check box’s)
A summary of each user’s functionality is included in fig. 2.5a, to assist your decision.

5. When the details have been completed, click Save to save the details of this user in the database. This screen will close and you will be taken back to the Users list screen where you can now see the name of the user you have just entered in the list.

6. Repeat the process to add other users and user types to the system.

Figure 2.5a outlines the functions that can be performed for each user type under a Dealership Administrator Subscription.
Deleting a User

The Company Administrator can delete a user from the system. To delete a user:

1. Click Users to display the User list screen (Figure 2.4).

2. Click on the Family Name or Given Name hyperlink of the user record that you want to delete to open up that user record as illustrated in Figure 2.5.

3. The Enabled checkbox will be ticked as illustrated in Figure 2.5. Click on the Enabled checkbox to de-select it. A warning message as illustrated in Figure 2.5b

4. Click on the Cancel button to cancel the deletion and retain the Sales Consultant in the system

5. Click on the OK button to receive a second warning as illustrated in Figure 2.5c

6. Click on the Back button to cancel the deletion and retain the Sales Consultant in the system

7. Click on the Save button to delete the Sales Consultant from the system. When the Save button is clicked, the system will re-direct the user back to the User List page and the Sales Consultant just deleted will no longer appear in the user list.
**Locking/Unlocking a User Account**

The Company Administrator can lock or unlock any user account, whilst a Group Leader can lock or unlock accounts for users in their group. Locking a User account does not delete that user from the system but just prevents that user from logging into the system. The system will automatically lock a user account if three attempts are made to log into the system with that username using an incorrect password.

To Lock a user account:

1. Click Users to display the User list screen (Figure 2.4).
2. Click on the Family Name or Given Name hyperlink of the user record that you want to delete to open up that user record as illustrated in Figure 2.5.
3. Click on the Locked checkbox to select it as illustrated in Figure 2.5d.
4. Click on the Save button.

**To Unlock a user account:**

1. Click Users to display the User list screen (Figure 2.4).
2. Click on the Family Name or Given Name hyperlink of the user record that you want to delete to open up that user record as illustrated in Figure 2.5.
3. The Locked Checkbox will be selected as illustrated in Figure 2.5d.
4. Click on the Locked checkbox to de-select it.
5. Click on the Save button.

![User Account Form](image)
**Adding a Group to the Quality Care - Sales Daily Traffic Control system**

1. Click the plus (+) sign to the left of Setup on the main menu to expand that menu item. You will now see displayed the five sub-menu items as illustrated in Figure 2.1.

2. Click Groups to open the Groups list screen (Figure 2.6).

3. Click on the Add button to create a new Group. Enter a Group Name and Description (Figure 2.7).

4. Click on the Save button to save the new Group. The Group list page (Figure 2.6) will be displayed and the new Group will appear on the Group List.
Assigning Users to a Group

1. Click the plus (+) sign to the left of Setup on the main menu to expand that menu item. You will now see displayed the five sub-menu items as illustrated in Figure 2.1.

2. Click Group Users to open the Group Users page (Figure 2.8).

![Figure 2.8 Group Users]

3. To assign a user to a Group, select the relevant Group from the Group drop down list...

4. Note: Only enabled users and users that have not yet been assigned to any group will be listed in the Available Users box.

5. In the Available Users box, click on the user to be assigned to the group. (Figure 2.9) You can select multiple users by holding down the <Shift> key on your keyboard, and clicking on each user to be assigned to the group.

![Figure 2.9 Group Users]

6. Click on the right arrow key. The user/s selected will be moved to the Assigned Users box. The system will display a message indicating the number of users that have been assigned to the group. (Figure 2.10).
NOTE: Currently a user can only be assigned to one Group

Unassigning Users to a Group
1. To unassign a user from a Group, select the relevant Group from the Group drop down list.
2. In the Assigned Users box, click on the user to be unassigned to the group. You can select multiple users by holding down the <Shift> key on your keyboard, and clicking on each user to be unassigned from the group.
3. Click on the left arrow key. The user/s selected will be moved to the Available Users box. The system will display a message indicating the number of users that have been unassigned from the group (Figure 2.11).

Allocating Potential Prospect Data
Potential Prospects gathered from various events can be uploaded by Ford Staff to your dealership. These potential prospects contain the necessary detail for your dealership to follow them up and convert them into prospects. The dealership's company administrators can allocate potential prospects to their dealership's sales consultants and their respective branches one at a time by filling in the remaining mandatory fields on the prospect data entry page.

1. Navigate to the Potential Prospect Data page which is under Data Entry in the menu. This is the list page which shows all of your potential prospect data in the system for your Dealership as shown in figure 2.12 below.
2. To allocate a potential prospect to a Sales Consultant and branch within your Dealership click the link and then the prospect data entry page will load up with the details of that potential prospect. The following fields will be automatically defaulted to the values listed below.

- Prospect Type – Warm
- Intention to Purchase – This Month
- Lead Source – Off-site Event/ Mall Display
- Motivator – Show / Event
- Customer Type – Private

Even though the values listed above are the defaults, they can be changed prior to saving if needs be.
Figure 2.13 below illustrates the data entry form by the default values set from the upload template file.

3. Select a branch and Sales Consultant and fill in any remaining mandatory fields and click save. For example, if you change customer type from ‘Private’ to ‘Fleet’, it will become mandatory to enter the fleet name.
From this point the potential prospect has been allocated and when you have been redirected back to the Potential Prospect list page that record will no longer appear.

Note that the record has not been deleted from the system. To view allocated prospects all you have to do is check the Show Allocated check box and click Search, as shown above in figure 2.12. From there you can see any potential prospects which have already been allocated. They can be distinguished by the fact that the hyperlink on the Date column is greyed out.

The link is disabled because once a potential prospect has been allocated it cannot be allocated again otherwise it would allow duplicates into the system.

The allocated potential prospect will now be visible on the Prospect Data list page and by default will immediately appear on Report #9 Walkout Followup Open Prospect Status with a Sales Process Stage Reached currently blank.

However depending on what other fields were entered on the Prospect Data Entry screen during the allocation, they may appear on other sections in Report #1 Sales Lead Workplan for the Sales Consultant to whom the potential prospect was allocated to.

It is also important to note that every allocated potential prospect is treated in the system as being no different to a prospect being entered through the Prospect Data Entry screen and as such they will display on all reports based upon the same criteria.
Recovering Prospect Data

When prospect data is removed by Sales Consultants or Data Entry Operators as outlined in Section 4, the system will send an email to all Company Administrators within your Dealership as shown in Figure 2.14 below.

Figure 2.14

To restore access to the prospect data one of your Dealership's Company Administrators will need to do the following:

1. Click the link in the email shown in Figure 2.14 as shown above. This will open up your computer's web browser and load up the QC-S Login page.
2. Enter in your user name and password and click ‘Login’. The system will then load up the Recover Prospect Data page as shown in Figure 2.15.

The Recover Prospect Data page will show you the user name of the user who deleted the prospects, the time they deleted the prospects in your Dealership’s local time, and most importantly a grid containing the details of the prospects which were deleted.
3. To restore any prospects which have not been deleted, the checkbox in the ‘Restore Prospect’ column will need to be checked for each prospect you which to restore on the current page for the grid.

4. If there are any prospects on which you do not want to restore (have not checked the ‘Restore Prospect checkbox) on the current page in the grid, you will need to check the ‘Confirm Deleted’ checkbox before clicking the save button.

5. Click the save button to restore the selected prospects. The page will then refresh displaying all of the remaining deleted prospects (including those previously confirmed to be deleted)

6. Follow steps 3 to 5 again until you have restored all prospects which need restoring and then click the back button to return to the Login Home page. At this point an email will be sent to all other Company Administrators in your Dealership to notify them that you handled these deleted prospects as shown in Figure 2.16.

NOTE: If no prospects need restoring then you can click the back button immediately without having to go through Steps 3 to 4. Deleted prospects are actually deleted unless they are restored meaning there is no need to do a ‘Confirm All’

NOTE: The back button must be clicked once you have finished recovering prospects otherwise an email will not be sent to all other Company Administrators within your Dealership.
Data Entry Tasks

In addition to the tasks outlined above, a Company Administrator can do all the tasks outlined for a Data Entry Operator in Section 4.
3. Viewing Dealership reports

All users under a Dealership Administrators subscription can choose to view and/or print Dealership reports. Group Leader can only view all group level reports (for their group only) which do not display prospect details. The group dropdown list will be disabled and default to his or her group and the branch dropdown list will be disabled. The Sales Consultant dropdown list only displays the list of Sales Consultants assigned to his or her group. Sales Consultants can only view reports relating to their own performance. The reports available at this time can be seen in Figure 3.2.

Accessing reports

1. Click the plus (+) sign to the left of the Reports item on the main on the main menu to display the menu to expand the Reports item and display the Dealership Reports Dealership Reports sub-menu link (Figure 3.1).

2. Select Dealership Reports to open the Dealership Reports screen where you can select a report to view (Figure 3.2)
3. Select the report you want to view and click to the left of the title of the report. You will now see a selection screen where you can choose a Sales Consultant from the list and an appropriate date for the report. **NOTE:** Dealership and Company Administrators can view reports for all staff. Group Leader can only view all group level reports (for their group only) which do not display prospect details. Sales Consultants can only view reports related to their own workplans and sales results.

4. For instance, the selection screen for the Sales Lead Workplan is similar to other report selection screens (Figure 3.3).

5. Select a Sales Consultant from the list. Only Dealership and Company Administrators can do this. Sales Consultants will only see their own name displayed. They cannot select other staff members.

6. You will see the current date displayed in the Date window. If you need to change the date, use the Date Picker to the right of the Date window to select another date.

**Report 1 - Sales Lead Workplan**

The Sales Lead Workplan report is a plan or job sheet for an individual Sales Consultant for the current day. It will include appointments for today and tomorrow based on previous contacts, and will include information on walk-outs that may return. It will display all prospect records with an appointment today regardless of the time of the day it is run.

The Sales Lead Workplan is both an automated diary and an action planner. The Sales Lead Workplan action planner section gives Sales Consultants the chance to identify their own action plans for the day, and to review them with the Sales Manager at the daily activity meeting. It also provides a format and a methodology whereby the Sales Manager can best plan his or her time to support Sales Consultants in areas such as:

- appointment setting
- planning to be available for specific prospective customers such as VIP’s, customers who are likely to require “double closing”, or other forms of management involvement
- assisting Sales Consultants with follow-up calls

1. Select **Report 1 - Sales Lead Workplan** from the Dealership Reports menu item to display the selection screen.

2. Select a Sales Consultant from the list on the Sales Lead Workplan screen, and leave the current date as displayed for this report.

3. Click **Open** to display an example of the report (Figures 3.4a)
Figure 3.4a Example of Report 1

<table>
<thead>
<tr>
<th>Name</th>
<th>Phone</th>
<th>Time</th>
<th>Model Interested In/Successful follow up</th>
<th>Comments</th>
<th>Prospect ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ga</td>
<td>000381</td>
<td>1:00 PM</td>
<td>Fiesta</td>
<td>30</td>
<td>1541398</td>
</tr>
<tr>
<td>Ra</td>
<td>000381</td>
<td>1:00 PM</td>
<td>Classic</td>
<td>13</td>
<td>1541361</td>
</tr>
</tbody>
</table>

**Walk-Out Follow up date:**

Prospects who have not committed to a specific Appointment date, but Dealership has scheduled a Walk-out follow up date to reopen discussion. Complete the Work-out follow up.

<table>
<thead>
<tr>
<th>Name</th>
<th>Phone</th>
<th>Model Interested In/Successful follow up</th>
<th>Comments</th>
<th>Prospect ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>P.</td>
<td>000331</td>
<td>Classic</td>
<td>30</td>
<td>1540555</td>
</tr>
</tbody>
</table>
NOTE: This report will run on a daily basis regardless of the time of day it is run. This will resolve the GMT offset issue where in the system calculates next appointment dates based upon the servers date and time and the sales consultants enter data based upon their local date and time.
**Report 2 - Sales Consultant Prospecting and Sales Status**

The Sales Consultant Prospecting and Sales Status report gives an overview of performance for the current month up to the current day, making it a month-to-date report of sales performance.

All Sales Consultants should also receive their own personalized Sales Consultant Prospecting and Sales Status report (QC-S Report #2). The Sales Manager and the Group Leader should receive a copy of the individual reports for all Sales Consultants under his or her supervision. The report:

- Measures prospecting and sales activity by individual Sales Consultant for total vehicles, and by model line
- Provides an insight into closing ratio, manager introduction and other key performance metrics from F&I penetration and accessory sales PNVS, to performance versus target and prospects required to visit to achieve target at the Sales Consultant current closing ratio.

1. Select **Report 2 - Sales Consultant Prospecting and Sales Status** from the Dealership Reports menu item to display the selection screen.
2. Select a Sales Consultant from the list and leave the current date as displayed for this report.
3. Click **Open** to display the report (An example of the report is shown as Figure 3.5).
Figure 3.5 Example of Report 2
Report 3 - Total Traffic and Sales Activity

This report provides insight into the total traffic on a daily basis for a Dealership, Branch or User Group, for example…

• walk-in showroom traffic
• all phone-in and e-enquiries
• number of Sales Consultant presentations to customers
• number of test drives
• test drive ratio
• deals closed
• total enquiry by average day and month history.

The foregoing information is tracked daily and month-to-date, and provides comparisons with…

• Average day last month
• Year-to-date daily average.

The report also dimensions source of leads and what motivated prospects to visit the dealership.

1. Select Report 3 - Total Traffic and Sales Activity from the Dealership Reports menu item to display the selection screen. The report can be run for a Dealership, Branch or Group.

2. To run the report for a Dealership just select a month and year for this report. To run the report for a Branch, select a Branch and a month and year. To run the report for a Group, select a Group and a month and year. To swap from branch to group report selection, hit the ‘refresh button and make the alternate selection.

3. Click Open to display the report (An example of the report is shown as Figure 3.6a and b).
### Total Traffic And Sales Activity - October, 2009

<table>
<thead>
<tr>
<th>Day</th>
<th>Total</th>
<th>Referral</th>
<th>Via/In</th>
<th>Previous Customer</th>
<th>Phone-in</th>
<th>Sales</th>
<th>Total Inquiry</th>
<th>Direct Mail</th>
<th>Other</th>
</tr>
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<td>Sat 17 Oct</td>
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<tr>
<td>Fri 16 Oct</td>
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<tr>
<td>Thu 15 Oct</td>
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<tr>
<td>Tue 13 Oct</td>
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<tr>
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<td>Fri 9 Oct</td>
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<td>Sun 4 Oct</td>
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<tr>
<td>Fri 2 Oct</td>
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<tr>
<td>Thu 1 Oct</td>
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<td></td>
</tr>
</tbody>
</table>

| Daily Traffic Control Log, FAP&A940/3.2, Property of Ford Motor Company | 33 |
Report 4 - Traffic Activity by Model Line

This report views the same source information as the proceeding report, but shows the detail by vehicle nameplate including Management data on sales trends, activity levels, and the overall market environment for the Dealership that assists management to better plan and respond to market situations, for example...

- total traffic by nameplate model
- individual nameplate movement trends through the 10 Step Showroom Experience/ Sales process
- enquiry
- test drive ratio
- price negotiation
- sales
- accessory sales
- extended service plan sales

It provides showroom traffic data in total, so as to measure and analyse overall market conditions and trends, to assist the planning of advertising, promotions, marketing programs and the like.
1. Select **Report 4 - Traffic Activity by Model Line** from the Dealership Reports menu item to display the selection screen. The report can be run for a Dealership, Branch or Group.

2. To run the report for a Dealership just select a month and year for this report. To run the report for a Branch, select a Branch and a month and year. To run the report for a Group, select a Group and a month and year. To swap from branch to group report selection, hit the refresh button and make the alternate selection.

3. From the Name Plate drop down list select a Vehicle. The graphs included in the report are specific to the vehicle selected from this drop down list.

4. Click **Open** to display the report (An example of the report is shown as Figures 3.7a and b).

---

**Figure 3.7a Example of Report 4 Page 1**
Report 5 - Sales Consultant Performance and Coaching Plan

The Sales Consultant information is presented in three distinct groups. Firstly, Total traffic activity by source of potential customer and their progress through the 10 Step Showroom experience, for example…

- total traffic (walk-in traffic and face to face appointments off site)
- presentation ratio
- test drive ratio
- closing ratio
- deals closed / total sales

Secondly, ‘Sales Up Sell Performance’, including

- F&I penetration ratio
- Accessory sales penetration
- Extended service plan penetration
- Retained gross profit per unit

Thirdly, ‘Sales Performance’, including

- target for the month
- % target achievement and sales ‘to go’, to achieve target
This information is tabled for the subject month, with reference also to the previous month for themselves and the Branch / Dealership as a whole. The report for each Sales Consultant then compares the Dealership averages across the entire sales team, enabling individual strengths and weaknesses to be identified, and assisting the subsequent coaching and counselling discussions, by an automatic system recommendation of coaching where required.

1. Select a Branch, Sales Consultant and a month and year for this report.
2. Click Open to display the report (An example of the report is shown as Figure 3.8).

Figure 3.8a Example of Report 5 Page 1
Report 6 - Sales Consultant Comparison Report

Like QC-S Report #5, this report reviews the three key areas of Sales process Performance, ‘Up Sell Performance’ and ‘Sales Performance’, but in addition provides an individuals comparison across all Sales Consultants, giving an instant summary of enquiry, closing ratio, sales MTD, sales ‘to go’ along with many other information areas for both managing the business day-to-day, and for weekly sales meetings. Performance data for the sales team in total also feeds into the overall training schedules.

1. Select Report 6 - Sales Consultant Comparison Report from the Dealership Reports menu item to display the selection screen.

2. To run the report for a Dealership just select a month and year for this report. To run the report for a Branch, select a Branch and month and year. To run the report for a Group, select a Group and month and year. To swap from branch to group report selection, hit the refresh button and make the alternate selection.

3. Click Open to display the report (An example of the report is shown as Figures 3.9a to f).
Figure 3.9a Example of Report 6 Page 1

Figure 3.9b Example of Report 6 Page 2
Figure 3.9c Example of Report 6 Page 3

Figure 3.9d Example of Report 6 Page 4
Figure 3.9e Example of Report 6 Page 5

Figure 3.9f Example of Report 6 Page 6
Report 7 - Sales Consultant Coaching Recommendations

QC-S Report #7 provides key Sales process performance ratio data (taken from Tool #4 Daily Traffic Control Log) with appropriate training solutions. For example, if the Dealership’s product presentation ratio is declining in total over time, then refresher training for the sales team in Step 2 “Needs Assessment” may be a beneficial training intervention.

1. Select **Report 7 - Sales Consultant Coaching Recommendations** from the Dealership Reports menu item to display the selection screen.
2. Select a Branch from the list and leave the current month and year as displayed for this report.
3. Click **Open** to display the report (An example of the report is shown as Figures 3.10a and b).
4. To run the report for a Group, select a group from the list, month and year.
Report 8 - User Logged on History

QC-S Report #8 is only accessible by Company Administrators, Data Entry, Admin Support, and Group Leaders and can be run at a Group, Dealership or Branch level. It provides a history of the last date and time each registered user logged into the system. It also shows a list of those users that have not logged into the system in the past two days.

1. Select Report 8 - User Logged on History from the Dealership Reports menu item to display the selection screen.

2. To run the report for a Dealership just select a date for this report. To run the report for a Branch, select a Branch and a date. To run the report for a Group, select a date.

3. Click Open to display the report, an example of which is illustrated in Figure 3.11 below.
### User Logon History

**Date:** Thursday, November 12, 2009  
**Dealership:** Morton Blacketer Pty Ltd

Users have been logged on to the system:

<table>
<thead>
<tr>
<th>Name</th>
<th>Last Logon</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bartholomew Fabricio</td>
<td>30 Sep 2009 1:28:42 PM</td>
</tr>
<tr>
<td>Huu/The Dinh</td>
<td>18 Feb 2009 12:18:43 PM</td>
</tr>
<tr>
<td>Matthew Hoare</td>
<td>12 Nov 2009 9:36:21 AM</td>
</tr>
<tr>
<td>Mehdi Bassiri</td>
<td>15 Oct 2009 9:46:02 AM</td>
</tr>
<tr>
<td>Stephen Blacketer</td>
<td>4 Jun 2009 0:56:51 AM</td>
</tr>
</tbody>
</table>

Users have NOT been logged on to the system in the past 2 days:

<table>
<thead>
<tr>
<th>Name</th>
<th>Last Logon</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bartholomew Fabricio</td>
<td>30 Sep 2009 1:28:42 PM</td>
</tr>
<tr>
<td>Huu/The Dinh</td>
<td>18 Feb 2009 12:18:43 PM</td>
</tr>
<tr>
<td>Mehdi Bassiri</td>
<td>15 Oct 2009 9:46:02 AM</td>
</tr>
<tr>
<td>Stephen Blacketer</td>
<td>4 Jun 2009 0:56:51 AM</td>
</tr>
</tbody>
</table>
Report 9 - Walkout Followup Status

QC-S Report #9 provides a summary of the potential customers who have not been followed up by a Sales Person and walkout for the day prior to today. This report can be run for a selected Branch or Group.

1. Select **Report 9 - Walkout Followup Status** from the Dealership Reports menu item to display the selection screen.
2. Select either a Branch or Group from the list.
3. Click **Open** to display the report (An example of the report is shown in Figure 3.12).

Figure 3.12a Example of Report 9 Page 1
Figure 3.12b Example of the output for Report 9

![Walk-out Follow-up Open Prospect Status Table]

<table>
<thead>
<tr>
<th>Consultant Name</th>
<th>Prospect Name / Prospect Mobile</th>
<th>Prospect Initial Visit Date</th>
<th>Selected Vehicle</th>
<th>Original Comments</th>
<th>Sales Process Stage Reached</th>
<th>Prospect ID</th>
<th>Call outcome Action required Followup comments</th>
<th>Future walk-out follow-up date scheduled</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ab Sh</td>
<td>S. Xi</td>
<td>7 Sep 2012</td>
<td>Pige</td>
<td>AB</td>
<td>Price Discussion</td>
<td>2424570</td>
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<td></td>
</tr>
<tr>
<td></td>
<td>S. Xu</td>
<td>13 Sep 2012</td>
<td>Classic</td>
<td>T3</td>
<td>Price Discussion</td>
<td>2430710</td>
<td>25 Apr 2013</td>
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</tr>
<tr>
<td></td>
<td>S. Su</td>
<td>28 Sep 2012</td>
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<tr>
<td></td>
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<td>Pige</td>
<td>AB</td>
<td>Price Discussion</td>
<td>2516266</td>
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<tr>
<td></td>
<td>S. Xu</td>
<td>14 Oct 2012</td>
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<td>Price Discussion</td>
<td>2521346</td>
<td>11 Dec 2013</td>
<td></td>
</tr>
<tr>
<td></td>
<td>S. Su</td>
<td>16 Oct 2012</td>
<td>Pige</td>
<td>AB</td>
<td>Price Discussion</td>
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<tr>
<td></td>
<td>S. Xi</td>
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<td>Classic</td>
<td>AB</td>
<td>Price Discussion</td>
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<td>S. Xu</td>
<td>18 Oct 2012</td>
<td>Pige</td>
<td>AB</td>
<td>Price Discussion</td>
<td>2532290</td>
<td>28 Dec 2013</td>
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<tr>
<td></td>
<td>S. Su</td>
<td>19 Oct 2012</td>
<td>Classic</td>
<td>AB</td>
<td>Price Discussion</td>
<td>2534876</td>
<td>28 Dec 2013</td>
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<td></td>
<td>S. Xi</td>
<td>20 Oct 2012</td>
<td>Pige</td>
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<td>2537382</td>
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<td></td>
<td>S. Xu</td>
<td>21 Oct 2012</td>
<td>Classic</td>
<td>AB</td>
<td>Price Discussion</td>
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<tr>
<td></td>
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<td>Price Discussion</td>
<td>2566862</td>
<td>28 Dec 2013</td>
<td></td>
</tr>
</tbody>
</table>
Report 10 - Prospect List Extract

QC-S Report #10 allows the Dealer Principal to extract their sales leads data within a period of time into an Excel spreadsheet file. It is only available to Company Administrators under a Dealership Administrator subscription.

Figure 3.13 illustrates the selection criteria for this report

To run the report:

1. **Select** Report 10 - **Prospect List** Extract from the Dealership Reports menu item to display the selection screen.
2. Select your report criteria from the selection criteria screen (Figure 3.13).
3. Click **Open** to display the report. When run, the report displays the data in an Excel Spreadsheet which spans multiple columns. These can be sorted or deleted as required for use by the Dealership. For example, to create a mailing list.

Figure 3.13a Example of the first part of the spreadsheet generated from Report 10
Report 11 – Lost Cases

QC-S Report #11 allows the Dealer Principal to report on Prospect Sales that were Lost To another Make and Model or where the Purchase Intention of the customer was recorded as “Never”. The report can be run by a Date Range and/or Sales Consultant. If a date range is entered, the dates must be no more than 90 days apart. Figure 3.14 illustrates the selection criteria for this report.

Figure 3.14 Selection Criteria for Report 11

![Lost Cases](image)

An example of Report 11 is illustrated in Figure 3.14a.

Figure 3.14a Example of the output for Report 11, page 1

![Lost Cases Output](image)
Figure 3.14b Example of the output for Report 11, page 2

<table>
<thead>
<tr>
<th>Consultant Name</th>
<th>Prospect Name</th>
<th>Prospect Phone</th>
<th>Prospect Mobile</th>
<th>Prospect Initial Visit Date</th>
<th>Original Comments</th>
<th>Model Interested</th>
<th>Original Intention to Purchase</th>
<th>Model Sold Last Time</th>
<th>Reason Sold Last</th>
</tr>
</thead>
<tbody>
<tr>
<td>SM SH</td>
<td>Pr</td>
<td>000997</td>
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<td>J2</td>
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</tr>
<tr>
<td>S1</td>
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<td>000992</td>
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<td>Figo</td>
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<tr>
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<td>J10</td>
<td>Figo</td>
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<td>11 Oct 2011</td>
<td>J7</td>
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<td>This Month</td>
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<td></td>
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<td></td>
<td></td>
<td>000992</td>
<td>11 Oct 2011</td>
<td>J9</td>
<td>Figo</td>
<td>This Month</td>
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<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>000995</td>
<td>11 Oct 2011</td>
<td>J10</td>
<td>Figo</td>
<td>This Month</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>000996</td>
<td>11 Oct 2011</td>
<td>J11</td>
<td>Figo</td>
<td>This Month</td>
<td></td>
<td></td>
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<td>11 Oct 2011</td>
<td>J12</td>
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<td>000982</td>
<td>12 Oct 2011</td>
<td>J16</td>
<td>Figo</td>
<td>This Month</td>
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<td></td>
<td>000983</td>
<td>12 Oct 2011</td>
<td>J17</td>
<td>Figo</td>
<td>This Month</td>
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<td>000984</td>
<td>12 Oct 2011</td>
<td>J18</td>
<td>Figo</td>
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<td>000985</td>
<td>12 Oct 2011</td>
<td>J19</td>
<td>Figo</td>
<td>This Month</td>
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<td></td>
<td></td>
<td>000986</td>
<td>12 Oct 2011</td>
<td>J20</td>
<td>Figo</td>
<td>This Month</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Tata Indica Marca No Reason
Report 12 - Sales Process Performance

QC-S Report #12 allows the Dealer Principal to report on exactly where prospects are lost in the sales process. This report, unlike Report #6 and Report #7 fully defines what is happening at each step of the sales process.

This report will run at a Dealership, branch, or group level which is consistent with Report 6, however the user can also select a Sales Consultant who is allocated to Dealership (default), a branch (has either monthly sales target or prospect data for the current month) or group. From there the chart on page two will filter to show only the data for this Sales Consultant.

**NOTE:** When the number of the Total Sale/Order Booked is larger than the Total of the Price Discussion, the Memo: Process Stage Loss Rate will be a negative number and the figure will not be plotted on the graph on page two. This may occur if there is a Sale/Order carried over from the previous month or prospect data has not been entered in accurately. Please check your entered prospect data.

Figure 3.15 illustrates the selection criteria for this report.

To run the report:-

1. Select **Report 12** – Sales Process Performance from the Dealership Reports menu item to display the selection screen.

2. To run the report for a Dealership just select a month and year for this report. To run the report for a Branch, select a Branch and a month and year. To run the report for a Group, select a Group and a month and year. To swap from branch to group report selection, set the selected one to blank and make the alternate selection. (Figure 3.15).

3. Click Open to display the report. When run, the report displays the data in an PDF document which spans 2 to 3 pages. These can be sorted or deleted as required for use by the Dealership.

**Figure 3.15 Selection criteria for this report**

An example of Report 12 is illustrated in Figure 3.16a, 3.16b and 3.16c.
Figure 3.16a Example of the output for Report 12 page 1

![Figure 3.16a Example of the output for Report 12 page 1](image1)

Figure 3.16b Example of the output for Report 12 page 2

![Figure 3.16b Example of the output for Report 12 page 2](image2)

Figure 3.16c Example of the output for Report 12 page 3

![Figure 3.16c Example of the output for Report 12 page 3](image3)
Report 13 - Current Bookings and Carry Over Status

QC-S Report #13 allows the Dealership Sales Managers to accurately track their Sales Consultants’ deliveries for a particular month. It allows for the tracking deliveries which are:

1. Carry over’s from Sales/ Orders Booked in a previous month
2. Sales/ Orders Booked to be delivered this month
3. Future Carry over’s which were booked this month but delivered next month
4. Sales/ Orders Booked where the delivery date is yet to be determined.

This report will run at a Dealership, branch, or group level which is consistent with Report 6, however this report shows all Sales/ Orders Booked and Deliveries for the current month even if they are into the future. This means that the Total Sales/ Orders Booked this month and Total Deliveries scheduled this month may be higher than Reported on Report 6 when running the report for the current month.

NOTE: Any prospect where the Delivery Date is prior to the Sale/ Order Booked date will not appear on this report

Figure 3.17 illustrates the selection criteria for this report.

To run the report:

4. Select Report 13 – Current Bookings and Carry Over Status from the Dealership Reports menu item to display the selection screen.

5. To run the report for a Dealership just select a month and year for this report. To run the report for a Branch, select a Branch and a month and year. To run the report for a Group, select a Group and a month and year. To swap from branch to group report selection, set the selected one to blank and make the alternate selection. (Figure 3.17).

6. Click Open to display the report. When run, the report displays the data in an PDF document.

Figure 3.17 Selection criteria for this report
An example of Report 13 is illustrated in Figure 3.18a.

**Figure 3.18a** Example of the output for Report 13

<table>
<thead>
<tr>
<th>Dealership: Bhogat Ford Jalander</th>
<th>Date: August, 2009</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Sales Consultant</strong></td>
<td><strong>Prospect Name</strong></td>
</tr>
<tr>
<td>Harneet Singh</td>
<td>Ho SI</td>
</tr>
</tbody>
</table>

**Key:**
- Can't Delivered - no delivery date entered
- Curled To This Month - Sales Order Booked status in prior month and Delivery date scheduled this month
- Future Carry Over - Sales Order Booked date in this month but Delivery date next month or later
- This Month - Sales Order Booked date in this month and Delivery date scheduled this month
- Delivered orders booked in the current month, irrespective of delivery date
- * Indicates order status canceled
- Indicates a deleted prospect
4. Data Entry Operator tasks

Data entry personnel are able to enter information for Sales Consultants in the Quality Care - Sales Daily Traffic Control system. Those two tasks are:

- Entering prospect data
- Entering monthly sales targets

Entering prospect data

Prospect Data can be entered by Company Administrators or Data Entry Operators who have access to Quality Care - Sales Daily Traffic Control.

1. Click the plus (+) sign to the left of the Data Entry menu item to expand that item so you can see displayed the three sub-menu items shown in Figure 4.1:

   - Working Days
   - Fleet Management
     - Create Contact Schedule
     - Fleet Customer Profile
     - Fleet UIO
   - Monthly Sales Targets
   - Potential Prospect Data
   - Prospect Data
   - Remove Prospect Data
   - Transfer Prospect Data

2. Click Prospect Data to open the Prospect Data list screen (Figure 4.2). At the top of the screen is a Search facility that you can use to narrow your search. A search can be narrowed down by Branch, Sales Consultant, Client Name, Prospect ID, Ford Unique ID, Mobile Number, Email Address or Date. Prospects are listed from the latest record to the oldest record for the past 7 days. To view prospect older than 7 days please use the ‘from’ ‘to’ date option in search facility.
3. To add a prospect for this Dealership, click the Add button at the bottom of the list. This will open the Prospect details screen where you will enter the information for this prospect (Figure 4.3a, 4.3b and 4.3c). The Visit Date and Visit Time text boxes will be automatically populated with the current date and time and these cannot be changed. You will need to select the Branch and Sales Consultant to allocate them to the prospect.

Figure 4.3a

The value that you choose in the Customer Type field will determine whether you fill out the “Private” or “Fleet” Prospect Data Form. The Fleet version of the prospect data form allows you to enter multiple vehicle sales. See details in the next section.
### Figure 4.3b

Complete the details you can for this prospect in the top section of the Prospects screen. The Visit Date and Visit Time text boxes cannot be modified. This screen can be re-visited and modified at any time.

---

**Prospect Data - New Vehicles**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visit Date:</td>
<td>23 FEB 2012</td>
</tr>
<tr>
<td>Visit Time:</td>
<td>12:48:44</td>
</tr>
<tr>
<td>Prospect Type:</td>
<td></td>
</tr>
<tr>
<td>Branch:</td>
<td></td>
</tr>
<tr>
<td>Sales Consultant:</td>
<td></td>
</tr>
<tr>
<td>Customer Type:</td>
<td>Private/Retail</td>
</tr>
<tr>
<td>ITP Update Required?:</td>
<td></td>
</tr>
<tr>
<td>Intention To Purchase:</td>
<td></td>
</tr>
<tr>
<td>Selected Vehicle:</td>
<td></td>
</tr>
<tr>
<td>Selected Fuel Type:</td>
<td></td>
</tr>
<tr>
<td>Lead Source:</td>
<td></td>
</tr>
<tr>
<td>Lead Source Comments:</td>
<td></td>
</tr>
<tr>
<td>Motivator:</td>
<td></td>
</tr>
<tr>
<td>Honorific:</td>
<td></td>
</tr>
<tr>
<td>Given Name:</td>
<td></td>
</tr>
<tr>
<td>Family Name:</td>
<td></td>
</tr>
<tr>
<td>Address Line 1:</td>
<td></td>
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<tr>
<td>Address Line 2:</td>
<td></td>
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<tr>
<td>Address Line 3:</td>
<td></td>
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<tr>
<td>City:</td>
<td></td>
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<tr>
<td>Country:</td>
<td>India</td>
</tr>
<tr>
<td>State:</td>
<td>Andaman and Nicobar Islands</td>
</tr>
<tr>
<td>Post Code:</td>
<td></td>
</tr>
<tr>
<td>Home Number:</td>
<td></td>
</tr>
<tr>
<td>Work Number:</td>
<td></td>
</tr>
<tr>
<td>Mobile Number:</td>
<td></td>
</tr>
</tbody>
</table>
More prospect details to complete. Please note, trade-in fields will only appear if the valuation/ trade-in is set to ‘yes’ or ‘yes and won’
4. Enter all the details you can at this time for this prospect. You can re-open this prospect from the Prospect Data list screen at any time and modify entered data and add new information. Remember to click Save every time the data is altered.

5. If a prospect changes their Intention to Purchase, you must select the Update Record checkbox before selecting a new Intention to Purchase option.

6. If a potential sale is lost to another Make and Model, you must select the Lost Sale checkbox and a Lost Sale Reason from the drop down list. If more than one reason is given, you must select the primary reason. You must also record the Make and Model that the Sale was lost to.

7. If a popup warning is displayed as shown in Figure 4.4b then either the email address or mobile phone number matches that of another prospect currently in your prospect database and display that prospect’s unique ID to you. If you click cancel the system will go back to the Prospect Data List screen. If you click okay you may continue but if the email address or the mobile phone number are not changed the system will mark this newly entered prospect record as a duplicate.

8. There are two comments fields with the first being linked to the Lead Source which can only be filled in when “Offsite Event / Mall Display” or “Other” are chosen. This comments field should only contain information related to the selected Lead Source. The second comments field is a general comments field where you can put any other information like vehicle colour for example.
9. To cancel a Sale/Order Booked, edit the record from the list page (refer Fig 4.2). Scroll down to the ‘Sale/Order Booked’ checkbox, which will be checked. Uncheck it and you’ll see the following dialog box (Figure 4.3f)

![Figure 4.3f](image)

Clicking OK will display a dropdown list of reasons for cancelling the sale/order booked. You must select a reason in order to save the record.

**Entering prospect data – Fleet Differences**

Private and Fleet Prospect Data are very similar, with the following differences:

1. After selecting Fleet as the Customer Type, you will need to choose the Fleet Type from the drop down list.

![Figure 4.4a](image)
2. When a Fleet Name is entered the system will use auto-complete to find existing fleet profile records that match the letters typed in. Use the up / down arrows to select one of the existing fleet names (refer figure 4.4a). If none of the suggested names are correct, then continue typing the fleet name. The system will create a new “Fleet Profile” record for the customer. Once you have completed the data entry on the Prospect Data form you will be redirected to the Fleet Profile page to complete entering details about the new fleet customer.

You can change the details of the Fleet Profile at any time by either clicking on the “Fleet Customer Profile” link below the “Fleet Name” box or by using the “Fleet Customer Profile” link on the “Fleet Management” menu.

Figure 4.4b

As you enter the fleet name the system will look up existing fleet companies. You can choose one from the list.
To enter a new fleet customer complete their name and when you save the prospect form you will be directed to complete the fleet profile.

3. Fleet prospect data entry allows you to enter as many selected vehicles as required. You can select multiple instances of the same model with different fuel types.

Figure 4.4c
4. Fleet prospect data entry allows you to enter as many purchased vehicles as required. You can select multiple instances of the same model with different fuel types and delivery dates. Enter all of the VIN numbers for each of the purchased vehicles in the one VIN Number(s) field. Separate individual VIN Numbers with a comma and a space.

Figure 4.4d
**Fleet Customer Profile**

For each fleet customer there is a Fleet Customer Profile. This profile is used to maintain information about this customer that remains constant when the customer has multiple prospect records. The Fleet Customer Profile can be reached from two places, the “Fleet Management” sub-menu under data entry or by clicking on the “Fleet Customer Profile” link in a fleet prospect record.

Move through the Fleet Profile page and complete the details as appropriate.

When you press save you will either be returned to the Prospect Record or back to the Fleet Profile List page.

**Figure 4.5a**

![Fleet Customer Profile](image-url)
Figure 4.5b

Figure 4.5c
**Fleet Units In Operation**

A part of each Fleet Profile is their Units in Operation. This allows you to gauge the penetration of Ford vehicles into the fleet customer’s fleet. Fleet Units in Operation can be viewed as part of the Fleet Customer Profile.

The Fleet Customer Profile can be reached from two places, the “Fleet Management” sub-menu under data entry or by clicking on the “Fleet Units In Operation” link in the fleet customer profile.

![Figure 4.6](image)
Fleet Customer Contact Schedule
The Fleet Customer Contact Schedule allows the dealer to setup a program of scheduled contact with each customer. This schedule operates independently of the prospect data.

Enter each type of contact and to whom it’s directed into the Create Contact Schedule. When this is saved it will create the individual contact events. Each event is linked to a sales consultant. These events will appear on the bottom of Report 1.

To create a Fleet Contact Schedule select “Create Contact Schedule” from the Fleet Management menu. To view an existing contact schedule, go the “Resources” menu, then the “Fleet Management” sub-menu and select “Fleet Contact Schedule”.

Figure 4.7a – Create Contact Schedule

![Create Contact Schedule](image)

Figure 4.7b – Fleet Contact Schedule

![Fleet Contact Schedule](image)
Removing Prospect Data

Prospect Data can be entered by Company Administrators or Data Entry Operators who have access to Quality Care - Sales Daily Traffic Control.

Prospect Data Records can be deleted from the system however extreme caution should be taken when deleting records. Company Administrators can delete any Prospect Data for his/her Dealership. Sales Consultants can only delete their own Prospect Data Records.

Records can be deleted by selecting:
1. A Date Range
2. Individual Prospect Data Record/s

Deleting Prospect Data Records using a Date Range

Only Company Administrators can delete Prospect Data records using a Date Range.

1. Select Remove Prospect Data from the Data Entry menu list to open the Remove Prospect Data screen. (Figure 4.8).

2. Click on the Date Picker and select a date in the From Date and To Date text boxes. Click the Search button to display a list of Prospect Data Records that were created within the Date Range specified (Figure 4.9).
3. To delete these records, click on the Delete button. A dialogue box, as illustrated in Figure 4.10a, will be displayed, re-iterating to the user what records are about to be deleted. Click the Cancel button if you do not want to delete the records otherwise, click on the OK button to proceed.

4. If the OK button is clicked, a second dialogue box, as illustrated in Figure 4.10b, will be displayed, giving the user one more chance to cancel the deletion of the Prospect Records. Click the Cancel button if you do not want to delete the records otherwise, click on the OK button to proceed.

5. If the OK button is clicked, the Prospect Data Records will be deleted and a message will be displayed as illustrated in Figure 4.11 below. An email will also be sent to all company administrators and group leaders who also have Recover Prospects checked as illustrated in Figure 2.5 to notify them of the delete.
Deleting individual Prospect Data Records
1. Select Prospect Data from the Data Entry menu list to open the Prospect Data screen (Figure 4.2). If you are a Company Administrator, you will see a list of all Prospect Data records entered against your Dealership. If you are a Sales Consultant, you will only be able to see your own Prospect Data Records.
2. Select the records to delete by clicking on the deleted checkbox. A tick will be displayed in the checkbox marking the record for deletion as illustrated in Figure 4.12. An email will also be sent to all company administrators and group leaders who also have Recover Prospects checked as illustrated in Figure 2.14 to notify them of the delete.

Figure 4.12

3. Click on the Delete button to delete the selected records. When the delete button is clicked, the two dialogue boxes illustrated in Figures 4.10a and 4.10b above will be displayed to confirm the deletion of the selected records.

Transferring Prospect Data
Only Company Administrators, Group Leaders and Data Entry Operators can transfer Prospect Data records from one Sales Consultant to another Sales Consultant. Group Leaders can only transfer Prospect Data within their Group. Once the records have been transferred, the Sales Consultant to whom the records were transferred takes full ownership of those records.

1. Select Prospect Data from the Data Entry menu list to open the Transfer Prospect Data screen (Figure 4.13). If you are a Company Administrator, you will see a list of all Prospect Data records entered against your Dealership. If you are a Sales Consultant, you will only be able to see your own Prospect Data Records.
2. Select the Sales Consultant from which to transfer Prospect Data Records in the From Sales Consultant drop down list, or enter the Prospect ID in the Prospect ID text box. (Figure 4.13)

3. Select the Sales Consultant to which Prospect Data Records will be transferred in the To Sales Consultant drop down list. (Figure 4.14)

4. Click on the Date Picker and select a date in the From Date and To Date text boxes. Click the Search button to display a list of Prospect Data Records that were created within the Date Range specified. (Figure 4.14)

5. Click the Search button to display a list of Prospect Data Records that will be transferred. (Figure 4.14)

6. To transfer these records, click on the Transfer button. A dialogue box, as illustrated in Figure 4.15 will be displayed, re-iterating to the user the details of the transfer. Click the Cancel button if you do not want to transfer the records, otherwise, click on the OK button to proceed.
7. If the OK button is clicked, the Prospect Data Records will be transferred and a message will be displayed as illustrated in Figure 4.16 below

**Entering Working Days and Sales Targets for Sales Consultants**

Company Administrators and Data Entry Operators can enter the number of Working Days and individual Sales Targets for Sales Consultants, on a monthly basis, for the Sales Consultants registered against their Dealership. Group leaders can enter the number of Working Days and individual Sales Targets for Sales Consultants, on a monthly basis, only for the Sales Consultants assigned to their group.

If your dealership policy doesn’t require you to enter in any of the target values below, please enter 0 for them.

- Unit Sales Number
- Finance Contract Revenue PNVS
- Insurance Contract Revenue PNVS
- Extended Warranty Revenue
- Accessories Revenue PNVS
1. By default the sales targets for the current month and first branch will be displayed for all enabled sales consultants (Figure 4.17). To view or enter sales targets for prior months or other branches, change the Branch, Month, and or Year drop down lists and click the Search button.

**NOTE:** If you do not click the search button any values entered will be recorded for the previously selected Branch, Month, and Year. Refer to the red label in Figure 4.17.

![Figure 4.17](image)

2. To allocate a Sales Consultant to the selected Branch for the selected Month and Year, click the Allocate check box. This will then allow you to enter in the Monthly Sales Target values for the allocated Sales Consultant. (Figure 4.18).

![Figure 4.18](image)
3. As the Monthly Sales Target values are entered a red dot will appear next to the Sales Consultant’s name and when all values have been entered this red dot will change to a green tick. Only records with a green tick are complete and will be saved. If you de-allocate a sales consultant their monthly sales target information will be deleted.

4. Upon clicking the save button the system will check for any incomplete rows (highlighted by a red dot) and if any are found the system will inform the user that these Monthly Sales Targets cannot be saved and then prompts them if they wish to continue. Clicking okay will result in the incomplete changes to Monthly Sales Target records being discarded. Clicking cancel will allow the user to go back and complete any incomplete Monthly Sales Targets. Refer to Figure (4.19).

Figure 4.19

5. If changes are made for the currently selected Branch, Month, and or Year and the user clicks the Search button without clicking the Save button, the system will notify the user that changes have been made and will prompt the user on whether or not they wish to save the change. If they click okay the system will then check for incomplete rows as mentioned in the above paragraph. If they click cancel the changes will be discarded. Refer to Figure (4.20).
6. Company Administrators and Data Entry Operators can update Sales Consultant Working Days or Sales Targets at any time as described in Section 5.

When a Company Administrator, or Data Entry Operator or Group Leader logs into the system, an alert will be displayed on the Login Home Page (Figure 4.21), listing all Sales Consultants for which a Monthly Sales Target record for the current month has not been entered. This message will continue being displayed on the home page until a Monthly Sales Target record for the current month has been entered for all Sales Consultants.
Entering Working Days for a Dealership

Company Administrators and Data Entry Operators can enter the number of Working Days, on a monthly basis, for the Sales Consultants registered against their Dealership.

1. Click Working Days from the Data Entry menu list to open the Working Days screen (Figure 4.22).

![Figure 4.22](image1.png)
A list of the number of working days entered for each month for the Dealership

2. Click on the Add button to display the Working Days entry form (Figure 4.23). The Year and Month will default to the current Year and Month. These can be changed if required by selecting the appropriate Month and Year from the drop down lists.

![Figure 4.23](image2.png)

3. Select the number of Working Days for the Month and Year from the Working Days drop down list.
4. Click on the Save button to save the record. The new record will now appear on the Working Days list illustrated in Figure 4.22.

If the number of Working Days for the current month has not been entered, when a Company Administrator logs into the system, an alert will be displayed on their Home page as illustrated in Figure 4.24. This message will continue being displayed on the home page until a record has been entered.

![Figure 4.24](image3.png)
Click on the “here” hyperlink to get re-directed to the Working Days entry page (Figure 4.22) and enter a record for the current Month.
5. Sales Consultant access

Sales Consultants can enter information into two screens:

- User (own data)
- Prospect Data

Sales Consultants can view information on several screens:

- Monthly Sales Targets (own data)
- Sales Consultant Working Days
- Dealership
- Reports (own data)

Entering Prospect data

Sales Consultants cannot register themselves or add themselves into the system, but once a Company Administrator or Data Entry Operator has added their details, they can modify their own personal details, including changing their password. They can also add data about prospective customers.

Modifying personal data

1. Click the plus (+) sign to the left of Setup on the main menu to expand that menu item (Figure 5.1).
   You will now see displayed the Figure 5.1 Select Users from the two sub-menu items: Setup list
   - Dealership
   - Users

2. Click Users to display the User list screen (Figure 5.2). You will only see your own user account in the list.

Figure 5.1

Figure 5.2
3. Click your name to view the details that have already been entered for you (Figure 5.3).

4. Make the changes you want on this screen and click Save to save those changes to the database.
   Don’t forget to confirm your password. You can change your password on this screen if you wish.

**Adding Prospect data**

1. Click the plus (+) sign to the left of the Data Entry menu item to expand that item so you can see
   displayed the three sub-menu items (Figure 5.4):
   - Fleet Management
   - Prospect Data
   - Monthly Sales Targets

2. Click **Prospect Data** to open the Prospect Data list screen (Figure 5.5). At the top of the screen is a Search facility that
   you can use to narrow your search. A search can be narrowed down by Branch, Client Name, Prospect ID,
   Ford Unique ID, Mobile Number, Email Address or Date.
   You will only be able to search and add your own Prospect Data records. The Sales Consultant drop down list will only
   contain your name as illustrated in Figure 5.5. Prospects are listed from the latest record to the oldest record.
Daily Traffic Control Log

Figure 5.5
The Sales Consultant drop down list will only contain your name.

3. To add a Prospect record click on the Add button at the bottom of the prospect list. This will open the Prospect details screen where you will enter the information for this prospect (Figures 5.6a, 5.6b and 5.6c). Note that the Sales Consultant text box will automatically be populated with your name which cannot be changed.

Figure 5.6a
Complete the details you can for this prospect in the top section of the Prospects screen. The value that you choose in the Customer Type field will determine whether you fill out the “Private” or “Fleet” Prospect Data Form

The Fleet version of the prospect data form allows you to enter multiple vehicle sales. See details in the next section
Figure 5.6b
More prospect details to complete. Please note,
the Visit Date and Visit Time text boxes cannot be modified. This screen can be re-visited and modified at any time.
Daily Traffic Control Log

Figure 5.6c
More prospect details to complete. Please note, trade-in fields will only appear if the valuation/trade-in is set to 'yes' or 'yes and won'.
4. Enter all the details you can at this time for this prospect. You can re-open this prospect from the Prospect Data list screen at any time and modify entered data and add new information. Remember to click Save every time the data is altered.

5. If a prospect changes their Intention to Purchase, you must select the Update Record checkbox before selecting a new Intention to Purchase option.

6. If a potential sale is lost to another Make and Model, you must select the Lost Sale checkbox and a Lost Sale Reason from the drop down list. If more than one reason is given, you must select the primary reason. You must also record the Make and Model that the Sale was lost to.

7. If a popup warning is displayed as shown in Figure 5.7 then either the email address or mobile phone number matches that of another prospect currently in your prospect database and display that prospect’s unique ID to you. If you click cancel the system will go back to the Prospect Data List screen. If you click okay you may continue but if the email address or the mobile phone number are not changed the system will mark this newly entered prospect record as a duplicate.

Figure 5.6d
Complete the details you can for this prospect in the bottom section of the Prospects screen.

The Private Customer Contact Schedule will appear once the Sales Order booked field has been checked.

Click Save to save the details you have entered. This screen can be revisited and modified at another time.

Figure 5.7
Entering prospect data – Fleet Differences

Private and Fleet Prospect Data are very similar, with the following differences:

1. After selecting Fleet as the Customer Type, you will need to choose the Fleet Type from the drop down list.

2. When a Fleet Name is entered the system will use auto-complete to find existing fleet profile records that match the letters typed in. Use the up / down arrows to select one of the existing fleet names (refer figure 5.8b). If none of the suggested names are correct, then continue typing the fleet name. The system will create a new “Fleet Profile” record for the customer. Once you have completed the data entry on the Prospect Data form you will be redirected to the Fleet Profile page to complete entering details about the new fleet customer.

You can change the details of the Fleet Profile at any time by either clicking on the “Fleet Customer Profile” link below the “Fleet Name” box, but only once the Prospect Data has been saved.
3. Fleet prospect data entry allows you to enter as many selected vehicles as required. You can select multiple instances of the same model with different fuel types.
4. Fleet prospect data entry allows you to enter as many purchased vehicles as required. You can select multiple instances of the same model with different fuel types and delivery dates. Enter all of the VIN numbers for each of the purchased vehicles in the one VIN Number(s) field. Separate individual VIN Numbers with a comma and a space.

Figure 5.8d
**Fleet Customer Profile**

For each fleet customer there is a Fleet Customer Profile. This profile is used to maintain information about this customer that remains constant when the customer has multiple prospect records.

The Fleet Customer Profile can be reached by clicking on the “Fleet Customer Profile” link in a fleet prospect record.

Move through the Fleet Profile page and complete the details as appropriate.

When you press save you will be returned to the Prospect Record.

---

*Figure 5.9a*
Figure 5.9b

Figure 5.9c
Fleet Units In Operation

A part of each Fleet Profile is their Units in Operation. This allows you to gauge the penetration of Ford vehicles into the fleet customer’s fleet. Fleet Units in Operation can be viewed as part of the Fleet Customer Profile.

The Fleet Units in Operation page can be reached by clicking the “Fleet UIO” link under the “Fleet Management” submenu.

Figure 5.10
Fleet Customer Contact Schedule

The Fleet Customer Contact Schedule allows the dealer to setup a program of scheduled contact with each customer. This schedule operates independently of the prospect data.

Enter each type of contact and to whom it’s directed into the Create Contact Schedule. When this is saved it will create the individual contact events. Each event is linked to a sales consultant. These events will appear on the bottom of Report 1.

To create a Fleet Contact Schedule select “Create Contact Schedule” from the Fleet Management menu. To view an existing contact schedule, click the “View Schedule” button from the Contact Schedule Edit page.

Figure 5.11a – Create Contact Schedule

Figure 5.11b – Fleet Contact Schedule
Viewing information

Sales Consultants can view information on several screens:

- Monthly Sales Targets (own data)
- Dealership
- Reports (own data).

**Monthly Sales Targets**

Only Company Administrator and Data Entry ‘User Types’ can create monthly sales targets. Once those targets have been created, Sales Consultants can read the entries, but are not permitted to change any data on these records except for the Number of Working Days.

1. Click *Monthly Sales Targets* from the Data Entry menu list to open the Monthly Sales Targets screen (Figure 5.8).

![Figure 5.12](image1)

2. By default, the sales targets for the current month and first branch will be displayed for only the logged in sales consultant. To view or enter sales targets for prior months or other branches, change the Branch, Month, and/or Year drop down lists and click the Search button.
Dealership information
If you are interested, you can view the Dealership information, but not change it.

1. Expand the Setup menu (Refer to Figure 5.1) by clicking on the plus (+) sign to display the sub-menu items.

2. Click Dealership to open the Dealership information screen (Figure 5.9). You can read this information, but not change it.

Figure 5.13

Viewing reports
You can only view your own information on the reports.

1. Expand the Reports menu item by clicking the plus (+) sign to the left of the menu item.

2. Select the sub-menu item Dealership Reports that is displayed for you to open the list of reports.

3. Select the report you want to view by clicking the Open link to the left of the report title. This will open the selection screen where you will see your name as the Sales Consultant. You cannot view reports for other Sales Consultants.

4. Check the date and click Open to display the report.
6. Group Leader tasks

Adding a Group to the Quality Care - Sales Daily Traffic Control system
1. Click the plus (+) sign to the left of Setup on the main menu to expand that menu item. You will now see displayed the five sub-menu items as illustrated in Figure 2.1.
2. Click Groups to open the Groups list screen (Figure 2.6).
3. Click on the Add button to create a new Group. Enter a Group Name and Description (Figure 2.7)
4. Click on the Save button to save the new Group. The Group list page (Figure 2.6) will be displayed and the new Group will appear on the Group List.

Assigning Users to a Group
1. Click the plus (+) sign to the left of Setup on the main menu to expand that menu item. You will now see displayed the five sub-menu items as illustrated in Figure 2.1.
2. Click Group Users to open the Group Users page (Figure 2.8).
3. To assign a user to a Group, select the relevant Group from the Group drop down list...
4. Note: Only enabled users and users that have not yet been assigned to any group will be listed in the Available Users box.
5. In the Available Users box, click on the user to be assigned to the group. (Figure 2.9) You can select multiple users by holding down the <Shift> key on your keyboard, and clicking on each user to be assigned to the group.
6. Click on the right arrow key. The user/s selected will be moved to the Assigned Users box. The system will display a message indicating the number of users that have been assigned to the group. (Figure 2.10).

NOTE: Currently a user can only be assigned to one Group
Unassigning Users to a Group
1. To unassign a user from a Group, select the relevant Group from the Group drop down list.
2. In the Assigned Users box, click on the user to be unassigned to the group. You can select multiple users by holding down the <Shift> key on your keyboard, and clicking on each user to be unassigned from the group.
3. Click on the left arrow key. The user/s selected will be moved to the Available Users box. The system will display a message indicating the number of users that have been unassigned from the group (Figure 2.11).

Editing User Details
The Group Leader can edit a restricted set of his or her group members’ user details.
To edit user details:-
1. Click Users to display the User list screen (Figure 2.4).
2. Click on the Family Name or Given Name hyperlink of the user record that you want to edit to open up that user record as illustrated in (Figure 2.5d).
3. The Group Leader can update any of the following fields:
   a. Given Name
   b. Family Name
   c. Phone Number
   d. Mobile Number
   e. Email Address
   f. User Name
   g. Locked
4. The Password and Confirm textboxes and all the user role checkboxes will be disabled as illustrated in (Figure 2.5d).
5. Click on the Save button to save the changes.
6. Click on the Back button to cancel the editing and retain the details.

Entering Working Days and Sales Targets for Sales Consultants
In addition to the tasks outlined above, a Group Leader can enter the monthly sales targets only for his or her group members as outlined for a Data Entry Operator in Section 4.
Notes

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