EasyQuote-DCS

Sale Executive Instruction Manual

Welcome EasyQuote Data Capturing System

EasyQuote-DCS is a simple, real-time, step-by-step program which will enable the sales executive to produce a fast, accurate and professional quote in a matter of minutes for any customer. It alleviates the necessity of manually writing down customer information and the delay in producing a formal quote.

Not only does EasyQuote-DCS produce a professional quote, but all the information is stored for future transactions. This means that a personal client history is developed, which is immediately accessible for any further quotes. When the client returns at a later stage there is an instant connection between sales person and client, even if it is a different sales person.

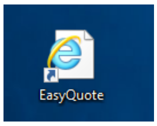
EasyQuote-DCS is also an invaluable Sales Administration tool, since every completed quotation captures vital statistics on marketing, advertising strategies, sales lost to competitors, price structures, staff performances, etc.

Contents

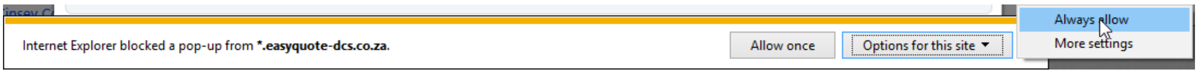
EasyQuote-DCS Site

Starting EasyQuote-DCS

- Double click on the EasyQuote-DCS shortcut on your desktop.



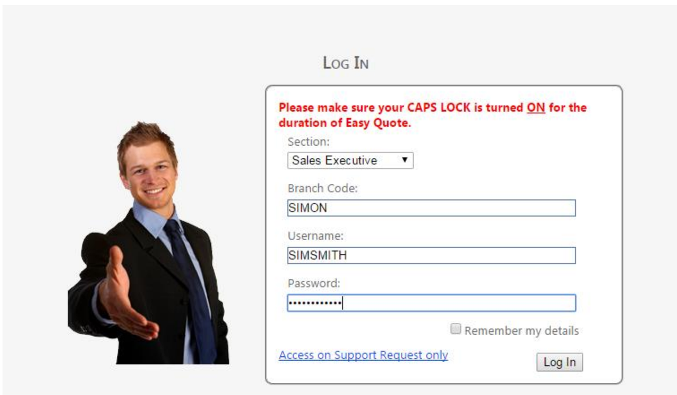
- If you receive any messages regarding pop-ups being blocked, select “Always Allow pop-ups for this domain”



- The EasyQuote-DCS Logon page should appear.

Logging In

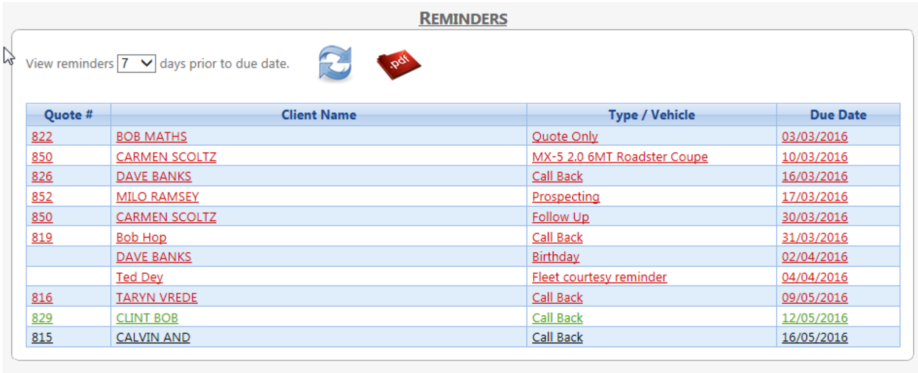
- Please make sure you have your **CAPS LOCK** turned on. Select **Sales Executive** and enter the **Branch Code**, **Username** and **Password**.
- Click **Log In** or press the **Enter** key on your keyboard.



Reminders Page

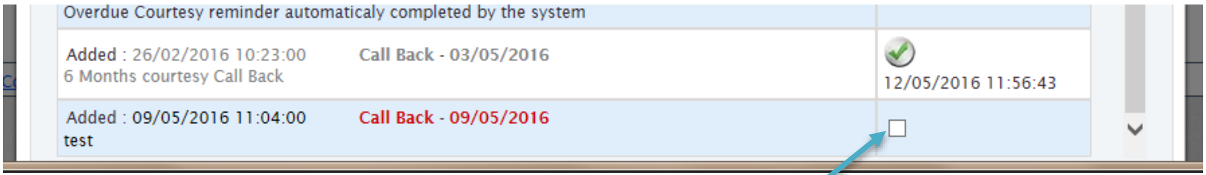
- Your reminders will be the first to appear after logging in. The system will generate these reminders for you based on quotes you have done, quotes that are left open, call back reminders on sold vehicles as well as birthday reminders.

- Reminders in **RED** are overdue. Reminders in **GREEN** are due today. Reminders in **BLACK** are due within the next seven days.

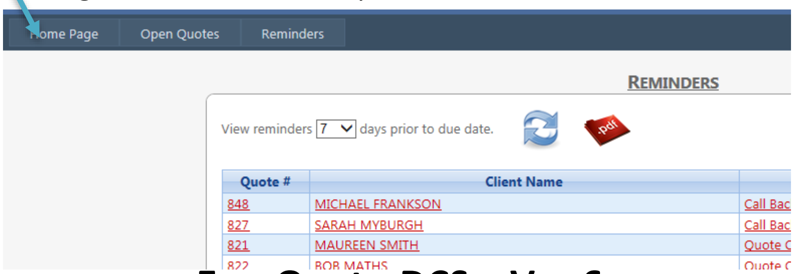


Quote #	Client Name	Type / Vehicle	Due Date
822	BOB MATHS	Quote Only	03/03/2016
850	CARMEN SCOLTZ	MX-5 2.0 6MT Roadster Coupe	10/03/2016
826	DAVE BANKS	Call Back	16/03/2016
852	MILO RAMSEY	Prospecting	17/03/2016
850	CARMEN SCOLTZ	Follow Up	30/03/2016
819	Bob Hop	Call Back	31/03/2016
	DAVE BANKS	Birthday	02/04/2016
	Ted Dey	Fleet courtesy reminder	04/04/2016
816	TARYN VREDE	Call Back	09/05/2016
829	CLINT BOB	Call Back	12/05/2016
815	CALVIN AND	Call Back	16/05/2016

- These reminders are here to help you maintain great customer service. To open the reminder, select the client's name and the reminder description will open up.

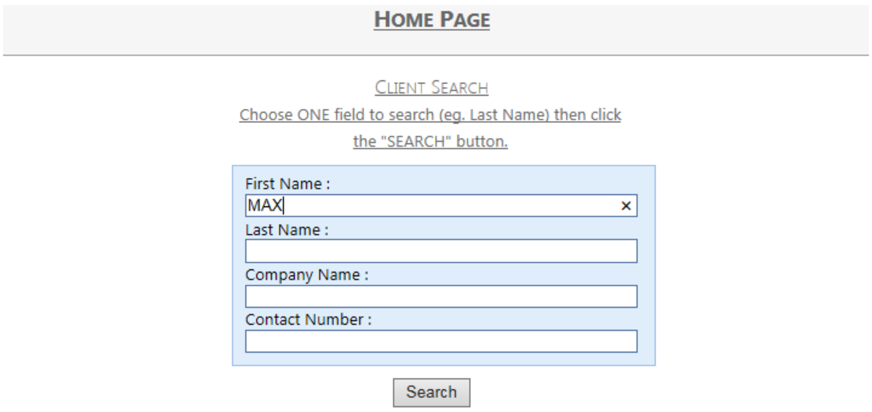


- After you have completed the task, you can then **tick** the box and mark that reminder as completed.
- You are not forced to respond to all your reminders at the same time, if you are in the middle of the task, you can revisit them at a later stage.
- If you are in the middle of another task, or if you are done attending to your reminders, select Home Page to continue with EasyQuote.



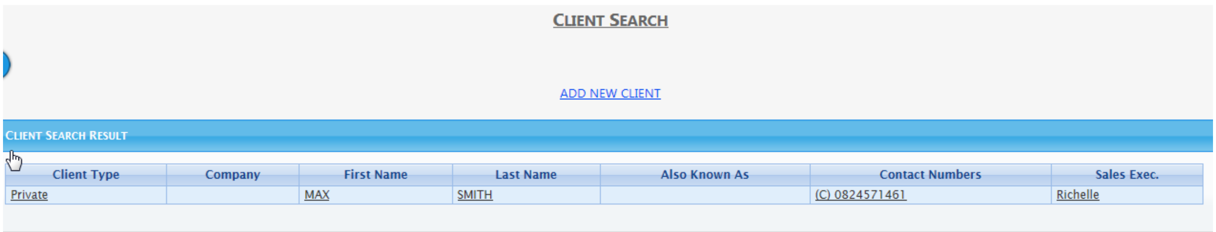
Home Page

- This is where you will search for existing clients, add new clients and start new quotes. It is always important to search the data base for a client before adding them as the client might has been quoted on before by a different sales executive and their particulars already saved on EasyQuote.
- To do this, enter either the **First Name**, **Last Name**, **Company Name** or **Contact Number** in the appropriate field. (Only choose to search for **ONE** of the fields). Click on **SEARCH** or press **ENTER.**



Selecting previously captured client details

- Once you have run a search for your client, the following screen will appear. It will show a list of all the clients who match the criteria that you searched for.
- If your client is not one of the clients in the list, click on the **ADD NEW CLIENT** link at the top of the screen and you will be taken to a screen where you will be able to capture your clients details.
- If your client is in the list you simply need to click on the correct clients name and the program will use the details that have been captured previously for the quote. It will also display all the quotes that the client previously received. From here you will be able to open a past quote for viewing, reprinting, emailing and editing.

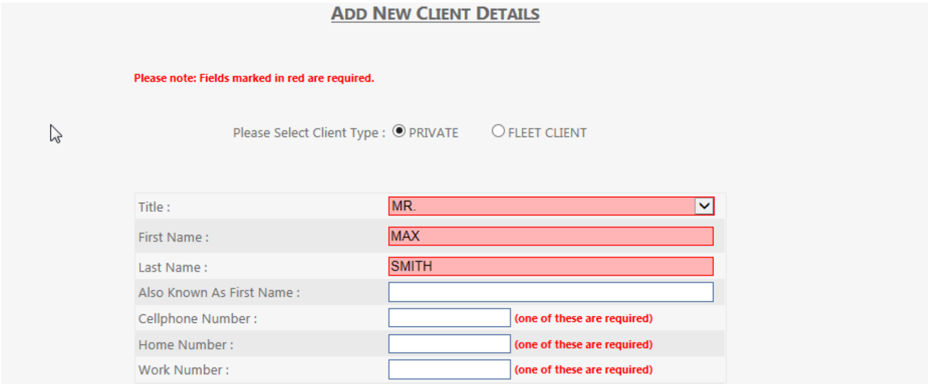


Capturing a New Client

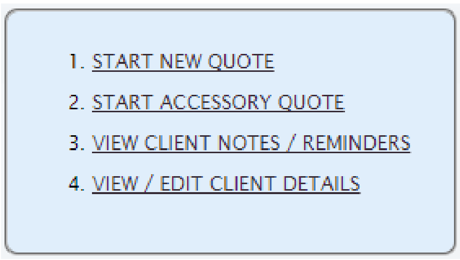
- If the client you searched for did not exist then click on ADD NEW CLIENT

- A screen to Add New Client Details will open. Use the drop down to select the correct title for the client and then capture as much of the clients details as you can. The lines in pink are the fields that are required and compulsory in order for you to proceed. (**Please do not leave any spaces between numbers when adding contact numbers**)

- Once you have captured the details click on the **SAVE** button at the bottom of the screen.

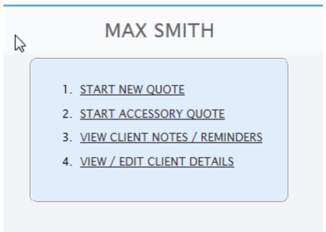


- Your client has now been added and you can select the various options below:

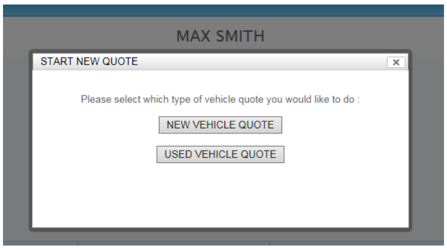


Starting a new Quote

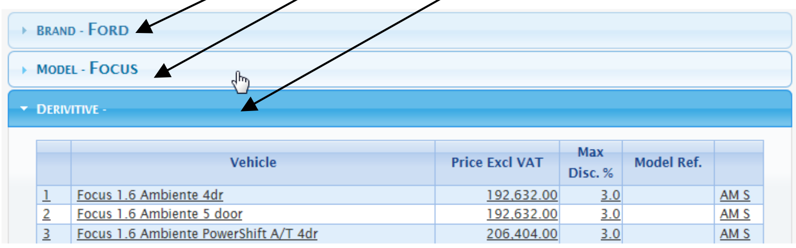
- Begin by selecting option 1. **Start New Quote** under the client's name.



- You then follow the steps by selecting **New** or **Used Vehicle**



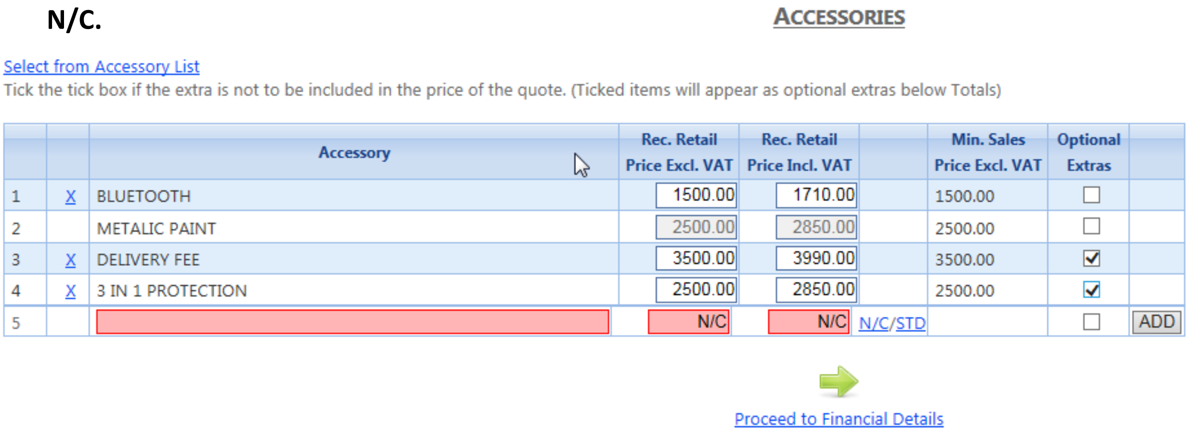
- Select **Vehicle Details** and choose **Brand**, **Model** and **Derivative**



	Vehicle	Price Excl VAT	Max Disc. %	Model Ref.	
1	Focus 1.6 Ambiente 4dr	192,632.00	3.0		AM S
2	Focus 1.6 Ambiente 5 door	192,632.00	3.0		AM S
3	Focus 1.6 Ambiente PowerShift A/T 4dr	206,404.00	3.0		AM S

- Select

- **Accessories** - If you select any of the accessories **by ticking** the box next to the accessory, this will be displayed as an optional extra and be excluded from the grand total on the quote. If the extra is a Standard Feature on the vehicle, then you must select **STD**. If you decide that you are going to give this extra to the client for No Charge, then you must select **N/C.**



ACCESSORIES

Select from Accessory List

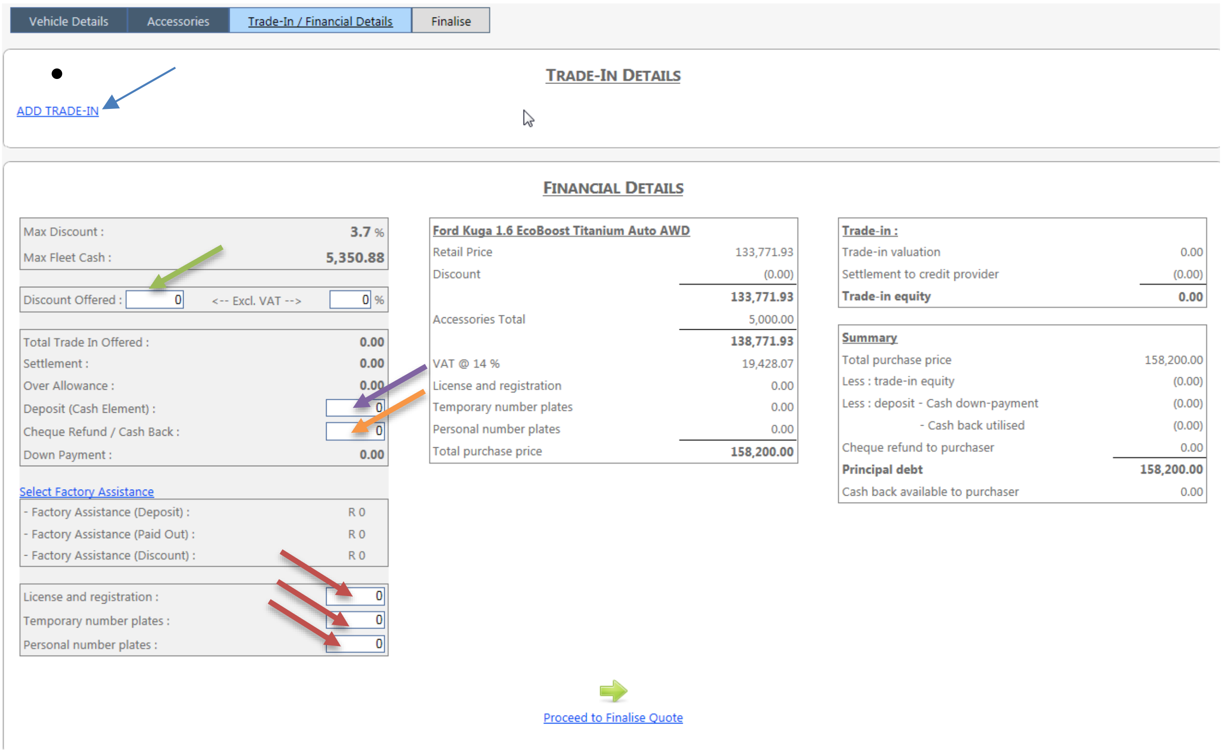
Tick the tick box if the extra is not to be included in the price of the quote. (Ticked items will appear as optional extras below Totals)

		Accessory	Rec. Retail Price Excl. VAT	Rec. Retail Price Incl. VAT		Min. Sales Price Excl. VAT	Optional Extras	
1	X	BLUETOOTH	1500.00	1710.00		1500.00	☐	
2		METALIC PAINT	2500.00	2850.00		2500.00	☐	
3	X	DELIVERY FEE	3500.00	3990.00		3500.00	☑	
4	X	3 IN 1 PROTECTION	2500.00	2850.00		2500.00	☑	
5			N/C	N/C	N/C/STD		☐	ADD

Proceed to Financial Details

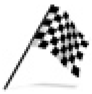
- Select
  Proceed to Financial Details

- Here is where you will finalise the quote. This includes the option to give a Discount, include a Trade-In (Maximum of 5 Trade-Ins allowed), **Program Money and** License and Registration Fees as well as Cash Deposit and Cheque Refund/Cash Back if needed. None of the fields need to have anything typed in them if you are not offering them the options. ***(See colour of the words matching the colour of the arrows)***



- Select 

  Proceed to Finalise Quote

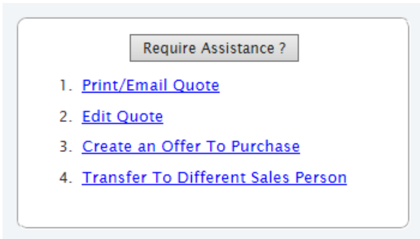
- Select Quote Method and click on 

  FINALISE

Print and Email Quotes

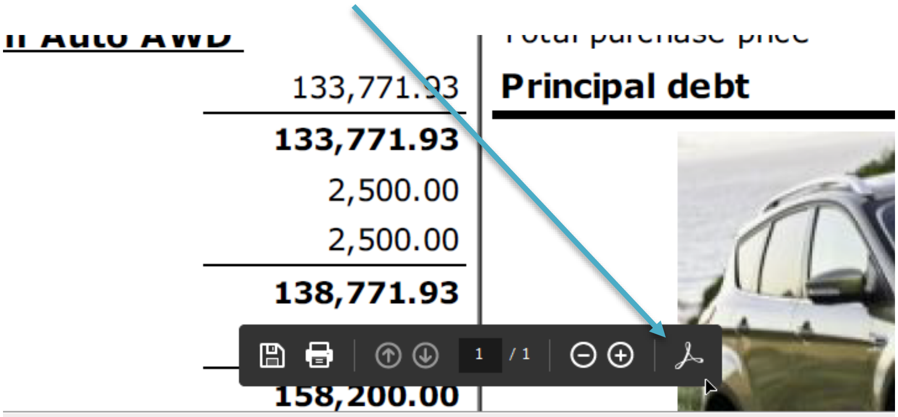
You can now open the quote for printing and emailing.

1. To **PRINT/EMAIL Quote** for the client choose option 1 from the screen below
2. To **Edit Quote**, select Option 2
3. To **Create an Offer to purchase**, select Option 3
4. Select Option 4 to **Transfer to another Sales Person**

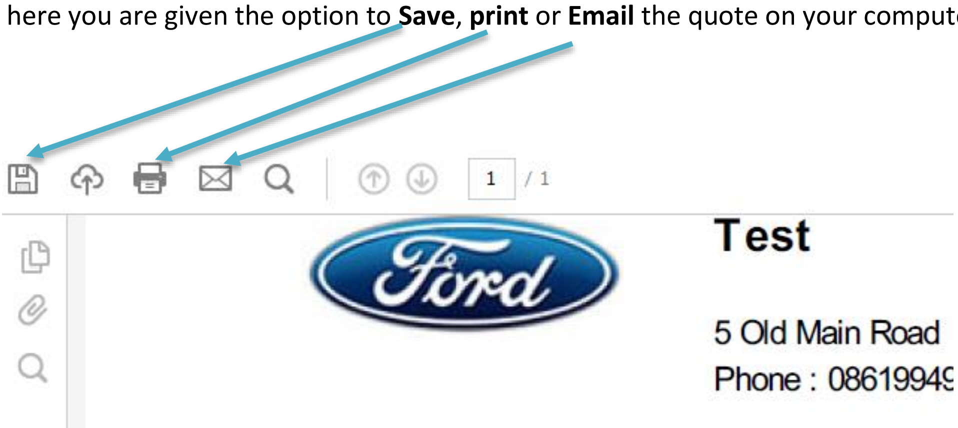


- Select **Print / Email Quote** to open the quote.
  If you find the below Tab on the bottom of the screen.

- **Select** to **Show the Adobe Acrobat Toolbar** (This toolbar will show the email icon)



- From here you are given the option to **Save**, **print** or **Email** the quote on your computer.



Create Offer to Purchase

- Once the quote has been done, you are now able to create an **Offer to Purchase**

Client Details

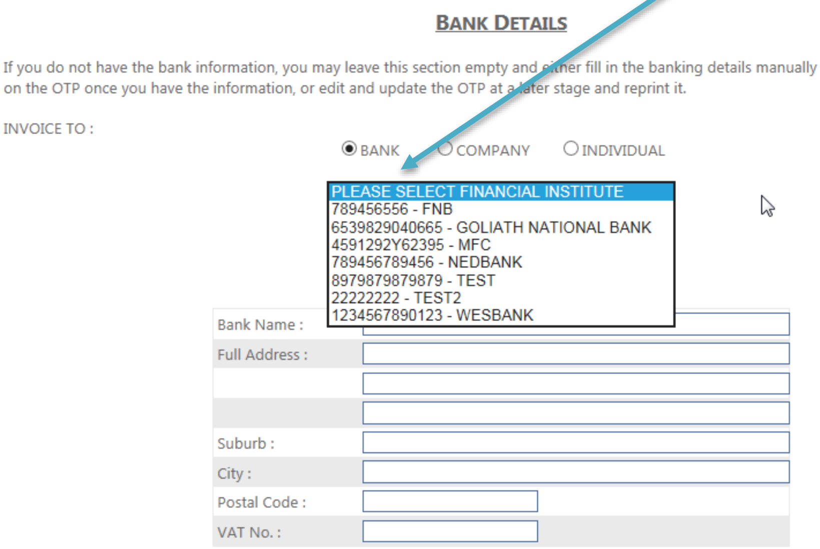
- After selecting **Create Offer to Purchase** you will be taken back to the client details for you to add in any further information and check current information. At this stage there may be addition required field that are highlighted in pink.

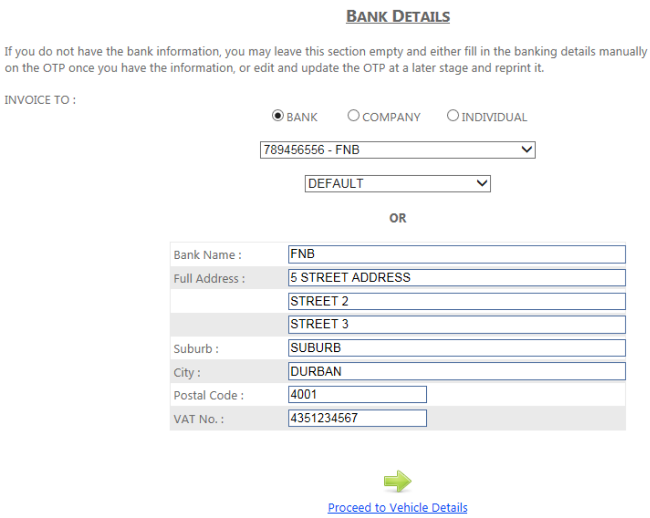
- Select

  Proceed to Bank Details

Bank Details

- This is where you have the option to add in all the relevant banking details.
- Management can preload all this information so that you don't have to fill it in.
- If this information has been preloaded, you can select the drop down that says **Please select Financial Institute** and the information will prepopulate.



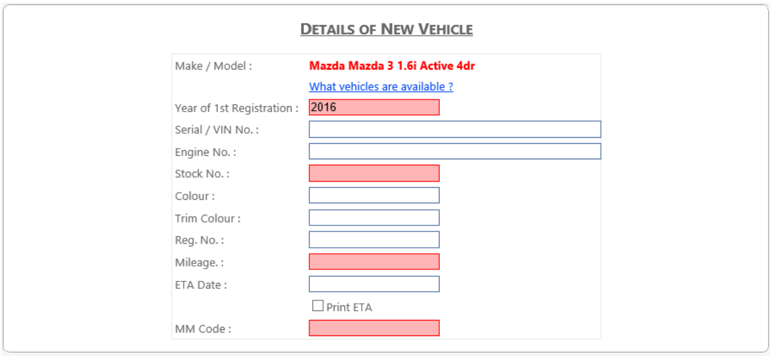


- Select

Proceed to Vehicle Details

Vehicle details

- Ensure you have filled in all the required fields that you highlighted in pink

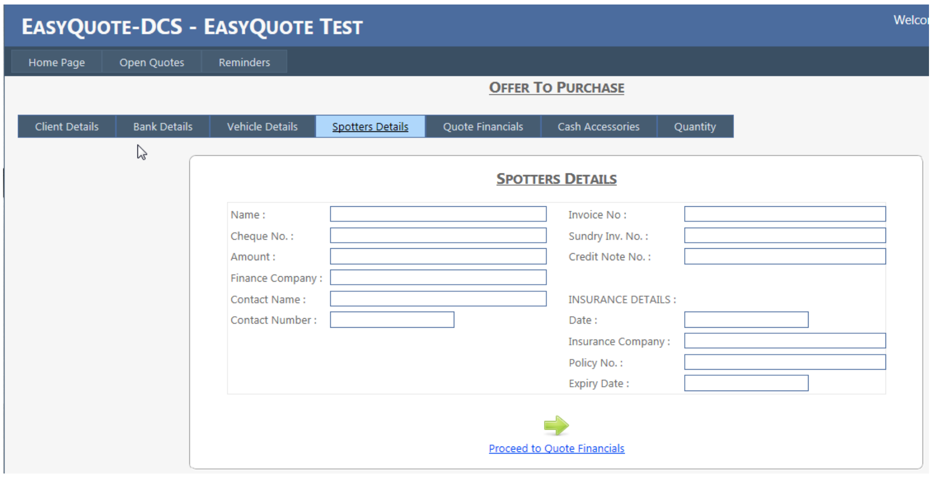


- Select

Proceed to Spotters Details

Spotter's Details

- Complete any Spotters Details that may apply, otherwise you can Proceed to Financial Details



- Select

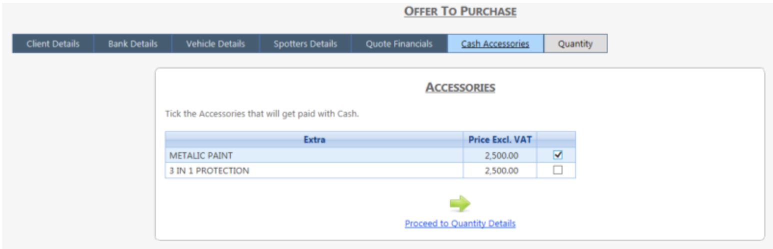
Proceed to Financial Details

Quote Financials

- Here you have the option to edit these amounts.
- Select 

  Proceed to Cash Accessories

- The box needs to be ticked next to any accessories which is being paid for in cash and is not part of the financed amount

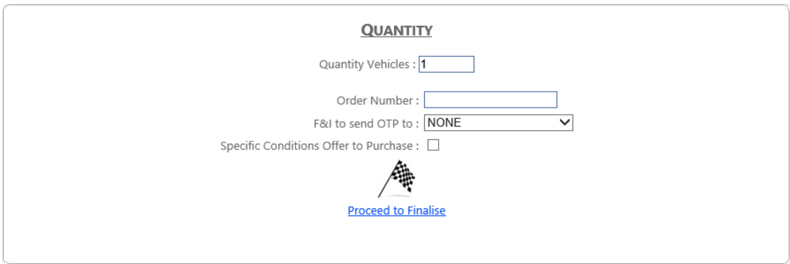


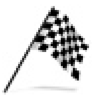
- Select 

  Proceed to Quantity Details

Quantity

- In order to finalise the Offer to Purchase, complete the quantity details.



- Select 

  Proceed to Finalise

Print and email Offer to Purchase

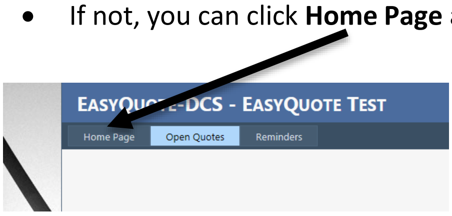
- Here you have options to either **Edit**, **Print** or **Email** the Offer to Purchase.
- Select option 3 to **Edit**
- Select option 4 to **Print or email**
- Select **Option 4 - Print/Email Offer To Purchase** and open the Quote.
- From here you are given the option to **Save**, **print** or **Email** the quote on your computer.

- Remember - If you find the below Tab on the bottom of the screen.

- **Select** to **Show the Adobe Acrobat Toolbar** (This toolbar will show the email icon)

View list of completed quotes for follow up Purposes.

- You can quickly display a list of recently completed quotes and Offer to purchases if you wish to do follow up phone calls. To do this all you need to do it go to **Home Page/Client Search**
- If you have just logged in, you will automatically be on the correct page.
- If not, you can click **Home Page** at the top left hand corner of the screen.

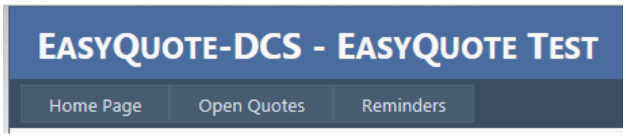


- At the bottom of your Home Page, you will see a table which is a summary of your profile.

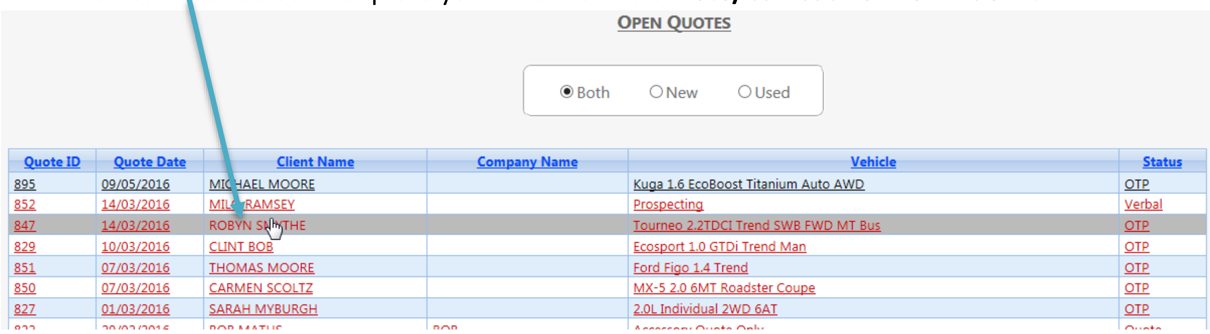
	Unallocated Leads	Open Leads	No. Red Open Quotes	No. Open Quotes	Pros Without Reminders	No. Of Overdue Reminders
New	0	1	4	6	1	20
Used	0	2	2	3	1	20

Make Call Back Reminders and Notes

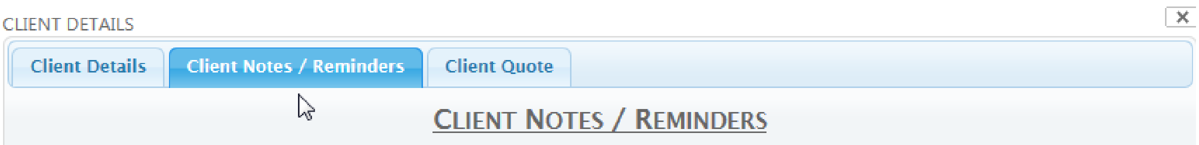
- You can make Reminders to do follow up phone calls and make notes for each quotation. This section is for your own personal use and you can make any notes about the client or the last conversation during the quotation process.
- You can add **Call Backs** or **Reminders** or **Notes** for any completed quote. You can either Add **Notes/Call backs** immediately after you have finalised a quote or you can retrieve any completed quote and add a **Note, Call Back or Reminder** to do it.
- From the Home Page, select Open Quotes at the top of the screen



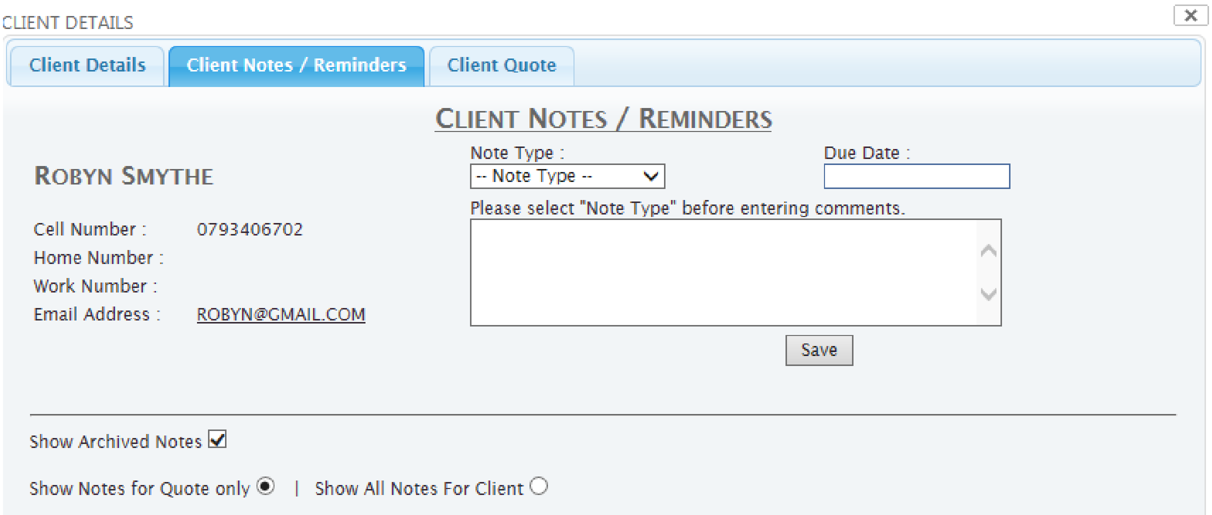
- You can then select the quote you which to add a **Note/Call back or Reminder** to



- You must now select **Client Notes/ Reminders** at the top of the quote.



- Here you can **select the note type, choose a date** and **write a comment**.



Closing Open Quotes

- From the **Home Page/Search Client screen** click on the number in **No. of Open Quotes.** To get a list of all **Open Quotes**

	Unallocated Leads	Open Leads	No. Red Open Quotes	No. Open Quotes	Pros Without Reminders	No. Of Overdue Reminders
New	0	1	4	6	1	20
Used	0	2	2	3	1	20

- All quotes remain open until they have been closed with a reason for closure.
- Click on the quote that has been finalised or is no longer a lead. And scroll to the bottom of the page until you get to **Quote Closure Options.** You can now **select** the reason for closing

Quote Closure Options

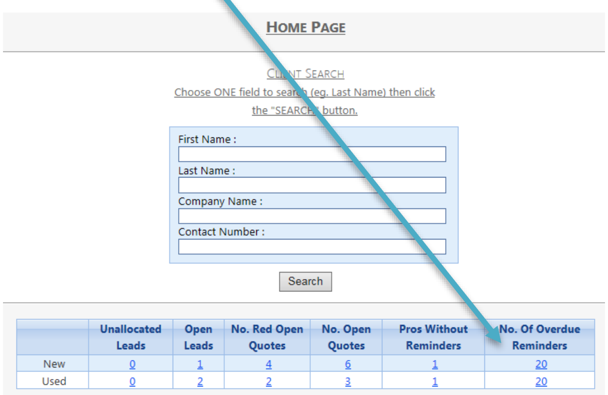
○ Delivered	○ Competitors	○ Financial	○ No Stock
○ Other Dealership	○ Postponed Sale	○ Comparative Quote	○ Other

the quote.

System Reminders

- The system is designed to bring items of importance to you attention.
- When you log in, the system will check to see if you have any outstanding reminders that need you attention, and you will arrive at the reminders page.

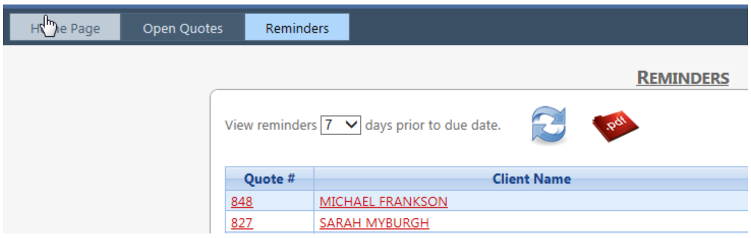
- You can also access these **Reminders** on your **Home Page** in the table that summarises your profile when you select **No. of Overdue Reminders**



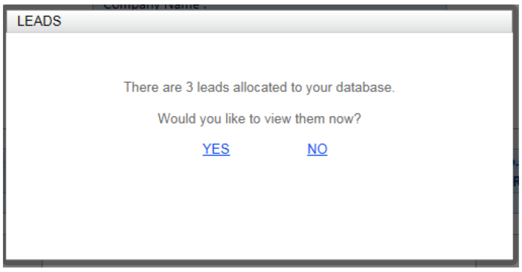
	Unallocated Leads	Open Leads	No. Red Open Quotes	No. Open Quotes	Pros Without Reminders	No. Of Overdue Reminders
New	0	1	4	6	1	20
Used	0	2	2	3	1	20

Accepting Leads

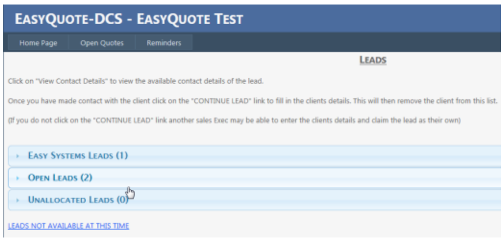
- After logging on and completing any **Reminders** due**, select Home Page**.



- If you have any leads available, this notification below will appear

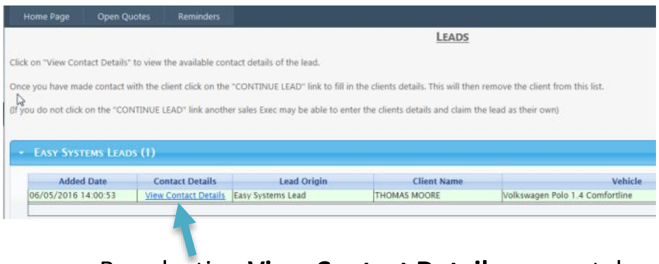


- If you are busy with another task and wold like to attend to the lead at another stage then select **NO**. If you would like to view the leads, click **YES** and you will be taken to your options below.



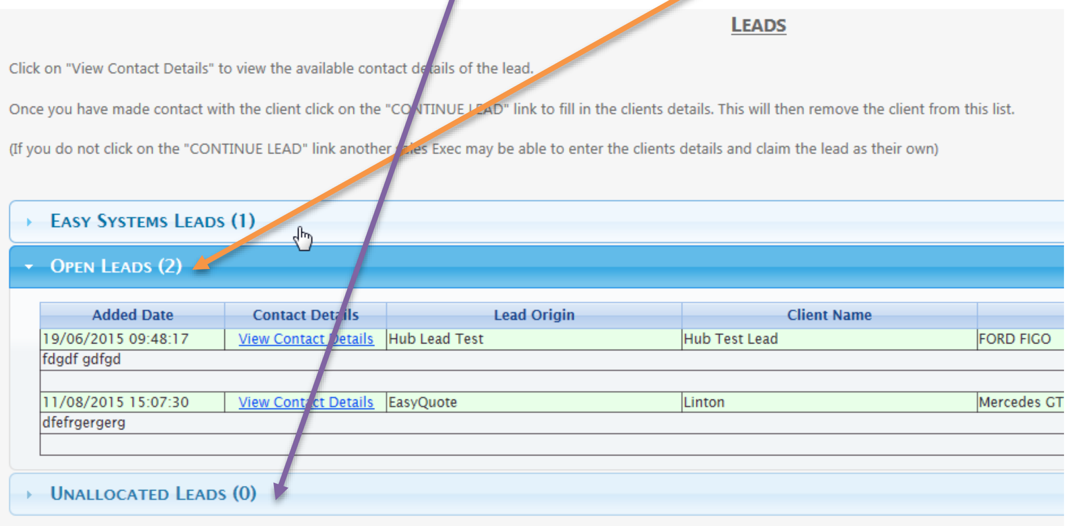
Types of Leads

- <u>**Easy Systems leads**</u> - These are automatically added leads based on the people and quotes you have previously loaded into the system. We will notify you of a possible matched clients to new vehicles that come into the dealership, it is vitally important that you add the client to the database. You are given the initial quote that you did for that client, as well as an **Easy Systems** suggestion matching the client with a similar vehicle.

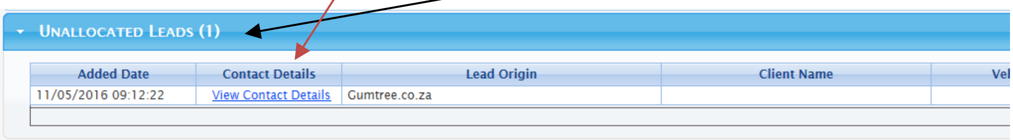


- By selecting **View Contact Detail** you are taken to the initial quote as well as the **Easy System Lead** for comparison.

- **Open** and **Unallocated leads** are used when a Sales Manager sends a potential sale to a Sales Executive. The lead can be originated from a web site, newspaper or any other means of getting leads from potential buyers. Any **Open Lead** belongs to you personally. And an **Unallocated lead** is available to any Sales Executive.



- When accepting an unallocated lead, you need to click on **Unallocated Leads.** You can then view the lead. Then select **View Contact Details**



- From here you can choose how you would like to proceed with the lead
- Either **Continue Lead**, **No Lead** or **Not a New Vehicle**
- Once you have accepted one of the below lead sources, you can continue with the client / quote as discussed previously in this user manual