



Part III Showroom Traffic

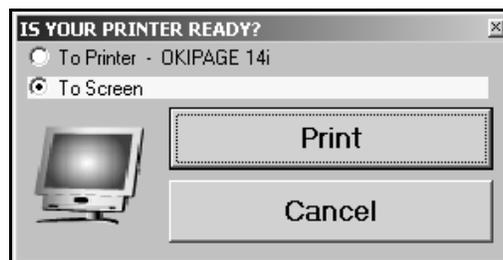
Chapter 18 Showroom Traffic Overview and Setup

You use the Showroom Traffic module to track your showroom traffic and prospective sales. The menu options allow you to enter prospective customers and to report on the progress of the sale. You can print reminder lists, followup letters, and activity reports. Showroom traffic does not pull or include UP's saved with a FasDeal in Desk Manager. UP's are not the same as prospects. Prospects are at the early stages of purchasing the vehicle, so the salesperson may not have discussed pricing yet. With UP's, the salesperson has discussed money, agreed on a figure, and added the figure to the FasDeal screen in Desk Manager.



Selecting Print Criteria

Whenever you print from the Showroom Traffic module, you have the option of viewing the information on your screen or printing it to paper. When the system prompts you to verify your printer is ready, click to select **To Printer** to print the information or **To Screen** to view the information on your screen. Once you select your print type, click **Print**.



Printing to screen allows you to preview the information before printing it to paper, which may be useful when printing customer letters. If you select to print the information to your screen, you can print the report from the viewing screen by clicking **File** and **Print**. To exit the viewing screen, click **File**, and click **Exit**.

System Setup & Updates

First, use the System Setup & Update menu to enter default information the system will use throughout the Showroom Traffic module. Once you begin using the program, you will use the last option on this menu to update the working files at the end of the month. Work your way through each option on the setup menu. Once you are finished entering the setup parameters, click **Back** to return to the Showroom traffic menu.

System Setup & Updates	
Salesman Information	Your Showroom Traffic is set to hold 5 months of data. The last update was 09/13/2006
Customer Sources	
Miscellaneous Parameters	
Enter Daily Worksheet Text	
End-Of-Month Update	
Back	

Salesman Information

This button opens the Salesman Information screen. You use this screen to add salespeople to the system. The Accounting, CSI/SSI, Desk Manager, and Traffic modules share a common sales database. Therefore, all salespeople entered in any of these modules are automatically added to the sales database, and the information for the salespeople can be viewed or edited from any of these modules. Once you start using the system, you can use this screen to view sales statistics. The fields at the bottom of the screen will display the monthly and year-to-date sales statistics for each salesperson.

Salesman Information																									
Salesman Code: <input type="text" value="02"/> Name: <input type="text" value="STEPHEN WILLIAMS"/> Phone: <input type="text" value="724"/> <input type="text" value="555"/> <input type="text" value="2222"/>	<table border="1"> <tbody> <tr><td>01</td><td>HOUSE DEALS</td><td>()</td><td>-</td></tr> <tr><td>02</td><td>STEPHEN WILLIAMS</td><td>(724)</td><td>555-2222</td></tr> <tr><td>03</td><td>ROGER SIERRA</td><td>(724)</td><td>555-3333</td></tr> <tr><td>04</td><td>SHANNON WRIGHT</td><td>(724)</td><td>555-4444</td></tr> <tr><td>05</td><td>PETER REED</td><td>(724)</td><td>555-5555</td></tr> <tr><td>06</td><td>ADAM CARTWRIGHT</td><td>(724)</td><td>555-6666</td></tr> </tbody> </table>	01	HOUSE DEALS	()	-	02	STEPHEN WILLIAMS	(724)	555-2222	03	ROGER SIERRA	(724)	555-3333	04	SHANNON WRIGHT	(724)	555-4444	05	PETER REED	(724)	555-5555	06	ADAM CARTWRIGHT	(724)	555-6666
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Closing Ratio Goal: <input type="text"/> Password: <input type="text"/> Last Month ... Year To Date ... Gross: \$ <input type="text" value="0.00"/> Gross: \$ <input type="text" value="0.00"/> Sales: <input type="text"/> Sales: <input type="text"/> Ups: <input type="text"/> Ups: <input type="text"/> Ratio: <input type="text" value="0.00%"/> Ratio: <input type="text" value="0.00%"/>																									
<input type="button" value="Exit"/> <input type="button" value="Print"/> <input type="button" value="Delete"/> <input type="button" value="Clear"/> <input type="button" value="Save"/>																									

Adding a Salesperson

1. Click **Salesman Information**. The Salesman Information screen appears.
2. Assign the salesperson a two-digit code. This serves as an ID number for the salesperson.
3. Type the Salesperson's name and phone number.
4. Type the salesperson's closing ratio goal. This is the salesperson's target sales percentage. This is an optional entry.
5. If you want to use passwords for the Traffic module, type the password you want to set for this salesperson. The salesperson will be required to enter the salesperson ID and password in order to access the Traffic module. The password can be up to five alphanumeric characters.
6. Click **Save**. The salesperson is added to the list window on the right side of the screen.

Viewing a Salesperson's Information

1. Type the salesperson's code, or click the salesperson in the list on the right side of the screen.
2. The salesperson's information fills in on the screen. Once you begin entering sales into the system, the bottom part of the screen displays the salesperson's sales statistics for the current month and year.
3. To edit information, click in a field, and edit the information as needed. Click **Save** to save the changes you make.

Deleting a Salesperson

Deleting the salesperson here also deletes the salesperson from the Accounting, CSI/SSI, and Desk Manager modules.

1. Select the salesperson.
2. Click **Delete**.
3. Click **OK** when prompted to verify you want to delete the record.

Printing the Sales List

The print button allows you to print a list of salespeople. The printout lists each salesperson and the salesperson's phone number.

1. Click **Print**.
2. When prompted to verify your printer is ready, select your print criteria.

Customer Sources

You use the Customer Sources screen to enter up to 35 sources that identify how customers heard about your dealership. When you enter prospective customers, you assign each a source code. This screen tracks and displays the number of customers that came into the dealerships each month and for the year due to each source. In addition, the list on the right side of the screen will keep a running count of the number of customers that came in for each source. You can print a traffic report based on sources and use the reports to help your dealership make marketing decisions.

The screenshot shows the 'Customer Sources' screen with the following elements:

- Source:** A dropdown menu with '9' selected.
- Description:** A text field containing 'REFERRAL'.
- Monthly Totals:** A grid of input fields for each month (JAN through DEC) and an 'Annual Total' field, all currently empty.
- Source List:** A list on the right side of the screen showing source codes and their corresponding counts:

0	None Entered	(0)
1	TU AD--LOCAL	(0)
2	TU AD--CABLE	(0)
3	NEWSPAPER AD--HERALD	(0)
4	NEWSPAPER AD--VINDICATOR	(0)
5	RADIO AD--95.1	(0)
6	RADIO AD--95.9	(0)
7	RADIO AD--98.9	(0)
8	RADIO AD--101.1	(0)
- Buttons:** 'Exit', 'Print', 'Delete', 'Save', and 'Clear' are located at the bottom of the screen.

Adding a Source

1. Click **Customer Sources**. The Customer Sources screen appears.
2. Assign the source an ID from 1 to 9 or A to Z.
3. Type a description for the source.
4. Click **Save**. The source is added to the list window on the right side of the screen.

Viewing a Source's Usage

Once you begin entering sales into the system, the bottom part of the screen displays the number of times the source has been used each month and for the current year.

1. Type the source ID, or click the source in the list on the right side of the screen.
2. The monthly totals fill in on the screen. Click **Print** to print the statistics for all of the sources.

Deleting a Source

1. Select the source.
2. Click **Delete**.
3. Click **OK** when prompted to verify you want to delete the record.

Miscellaneous Parameters

You use this screen to enter parameters for three areas of the program.

The screenshot shows the 'Miscellaneous Parameters' window. It features two columns of text boxes for descriptions. The left column, 'Result Descriptions', contains 9 entries, with the first three being 'Sold', 'Bad Credit', and 'Other Dealer'. The right column, 'Action Descriptions', contains 6 entries: 'Sales Presentation', 'Demo Ride', 'Scheduled Return', 'Walked with OK', 'Earned Business', and 'Desked Deal'. Below these are two summary fields: 'Overall Dealership Closing Ratio Goal: 40.00%' and 'Active Prospects May Be Held From 1 To 5 Months Before Purging {1-5}: 5'. 'Exit' and 'Save' buttons are at the bottom.

1. Click **Miscellaneous Parameters**. The Miscellaneous Parameters screen appears.
2. Under **Result Descriptions**, type descriptions of results the salespeople can use to explain the outcome of a prospective sale. “Sold” is hard coded as the first result. You cannot edit this field. However, you can edit the remaining eight fields. Each description can be up to 15 characters. These results are available on the Enter Results screen.
3. Under **Action Descriptions**, type up to six descriptions for actions the salespeople need to take with prospects. These descriptions appear on the Enter Prospect screen and allow the salespeople to track their progress with a prospect. The system comes with preset descriptions, but you can edit the fields as needed.
4. Next, indicate the dealership’s target closing ratio percentage. This is the dealership’s target sales percentage. The system uses this figure to generate sales reports.
5. Finally, specify how long to keep prospect files in the system. You can select to hold the files from one to five months. After the specified time, the system deletes the records during the monthly update. The System Setup & Updates menu displays the number of months you specify for your reference.
6. Click **Save** to save the information. The system returns you to the System Setup & Updates menu.

You can return to this screen and edit the information as needed. Simply click in a field, and edit the information as needed. Make sure you click **Save** to save the changes. Clicking **Back** closes the screen but does not save the information.

Enter Daily Worksheet Text

Use this button to open the Daily Worksheet screen to create worksheets the salespeople can use to aid them with their daily tasks. Once you enter the information, use the Print Traffic Reminders & Daily Worksheets menu to print the daily worksheets.



1. Click **Enter Daily Worksheet Text**.
2. Type the text you want to add to the worksheet on each line. You can enter up to 20 lines of text, and each line hold 70 characters.
3. As you type, **You must press ENTER** to force line breaks as you type instead of allowing the text auto-wrapping feature to move the text to the next line. Pressing ENTER to break the lines ensures your text will print properly.
4. Click **Save**. The system returns you to the System Setup & Updates menu.

You can return to this screen and edit the information as needed. Simply click in a field, and edit the information as needed. Make sure you click **Save** to save the changes. Clicking **Back** closes the screen but does not save the information.

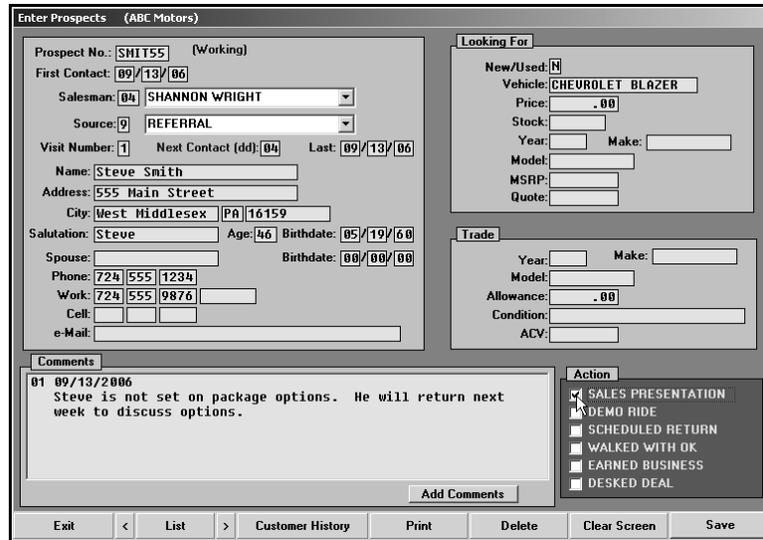
Compose/Edit Letters

You compose letters in the Showroom Traffic module the same way you do in the CSI & SSI module. Remember, all letters you create in CSI/SSI, Showroom Traffic, and Marketing are available in a common letter database. See "Creating a New Letter" on page 16 for instructions on creating letters.

Once the setup is complete, you can begin entering prospects.

Chapter 19 Enter Prospects

When prospects come to the dealerships, you create a prospect file for them using the **Enter Prospects** button. You record the customer's information, information about the vehicle the customer looked at, and information about the customer's potential trade-in vehicle. You also indicate the actions you took with the customer.



Entering a New Prospect

1. Click **Enter Prospects**. The Enter Prospects screen appears.
2. Assign the prospect a prospect number. This field accepts alpha and numeric characters. You should assign prospect numbers following your dealership's standard system for assigning customer numbers.
3. The **First Contact** date defaults to the system date. Edit the date as needed. This should be the date the prospect first came into the dealership.
4. In **Salesman**, type the code for the salesperson the prospect is working with, or select the salesperson from the drop-down list.
5. In **Source**, type the code for the source that brought the customer to the dealership, or select the source from the drop-down list. You entered the sources using the Customer Sources option on the System Setup & Updates menu.
6. The **Visit Number** defaults to 1. As the customer comes into the dealership, you should increment this value.

7. In **Next Contact**, indicate the number of days you want to pass before you contact the prospect. This field is used when printing the reminder lists. This is a required field. You must enter and save a numeric value in this field to prevent the system from automatically deleting the prospect during the End-Of-Month Update run from the System Setup & Updates menu. The update needs to be performed at the end of the month to ensure your statistical analysis is current.
8. The **Last** field defaults to the system date. As you work with the customer, edit this date to ensure you always have a record of the last time you made contact with the prospect.
9. Type the prospect's name, address, and phone number. This information is used to print letters and mailing labels and will print exactly as it appears in these fields.
10. Use the **Salutation** line to specify the name that should print on the salutation line of the customer letters. This is an important field. If you do not enter a name, no name prints on the letter. The salutation will print on the letter exactly as it appears in this field.
11. Fill in the customer's age and birth date if available. If you do not know the customer's age, you can enter an approximate age. Since customers may not provide a birth date or since your dealership may not collect this information, the **Age** field is *not* connected to the **birthdate** field, so the customer's age will not automatically calculate or update.
12. In **Spouse**, type the name of the customer's spouse, and enter the spouse's birth date in the **Birthdate** field if this information is available.
13. Next, fill in the customer's home phone number, work phone number, and cellular phone number.
14. Type the customer's e-mail address in the **e-Mail** field.
13. Under **Looking For**, type the information for the vehicle the prospect wants. Indicate if it is new (N) or used (U). Type a description of the vehicle the prospect wants. If the prospect looked at a specific car in your stock, enter the stock number, and the model year, make, and model name automatically fill in the fields. Enter the price and quoted price for the vehicle. These are not required fields, but this information will provide additional data on the follow-up worksheets.
14. Under **Trade**, type the information for potential trade-in vehicle. Enter the model year, make, model name, cash allowance, vehicle's condition, and vehicle's actual cash value. These are not required fields, but this information will provide additional data on the follow-up worksheets.
15. Use the **Comments** section to record notes about the prospect. Click **Add Comment**, and type your comment in the box that appears. Click **Close** to save the comment. The system automatically dates and numbers the comments as you enter them. Each comment can be up to 300 characters.
16. Use the **Action** section to indicate the actions taken with the prospect. You entered the action descriptions using the Miscellaneous Parameters option on the System Setup & Updates menu. Click in a box to select it. A checkmark appears in the field. Click in a box again to clear it.
17. When you are finished entering information, click **Save** to save the prospect's record.

Editing Prospect's Information

1. Type the prospect number, or click **List** to select the prospect from a list of prospects. Use the buttons on the bottom of the list screen to filter and sort the list. You can select to view all prospects, prospects for the current month, or prospects for last month. You can also choose to sort the list based on the last contact date.
2. The prospect's information fills in on the screen. You can scroll through the prospect list by clicking the arrows on each side of the **List** button.
3. Click in a field, and edit the information as needed.
4. To edit a comment, click **Add Comment**. Type the comment number in the Record field. Edit the text as needed, and click **Close** to save the changes.
5. Click **Save** to save the changes.

Pulling a Prospect from Customer History

You can pull existing customers' information to a prospect file.

1. Click **Customer History**. The Customer Information screen appears.

The screenshot shows a 'Customer Information' form with the following fields:

- Customer Number: [Redacted] Last 8: [] VIN: [] Active/Inactive (A/I): []
- Name: [] Home: [] Work: []
- Name: [] Salutation: []
- Address: [] Memo: []
- City/State: [] Birthdate: []
- e-Mail: [] Salesman: [] Cars Purch Here: []
- Stock No: [] Year: [] Color: [] Delivered: []
- Car Line: [] Make: [] Keys: [] Odometer: []
- New/Used/Other: [] Model: [] License: [] In Service: []
- Lease/Purch/Finance: [] Body: []
- Last Service: []
- Next Service: []
- Total Service Visits: []
- Inspection Month: []
- Service Contract: []
- Term: [] Expires: []

At the bottom, there is a note: "If Multiple Vehicles For This Customer, Click 'Car From List'". Below the form are buttons: Exit, Search Customers, Convert To Traffic, Clear, History, and Save.

2. Click **Search Customers**. A search screen appears.
3. Type the last four digits of the customer's phone number, first three letters of the customer's last name, or the license number.
4. The screen displays a list of customers who meet the criteria you entered. Click the customer you want to select. The Customer Information screen displays the customer's information.
5. Click **Convert To Traffic**. The customer's information automatically fills in on the Enter Prospect screen. Enter or edit information on this screen as needed.
6. Click **Save** to save the file.

Printing the Prospect's Information

Use the **Print** button to print a prospect's information. The top part of the printout lists the prospect's information. The next part lists the first, last, and next contact dates, so it is easy to identify the prospect's activity. The last part of the printout lists the comments and the information for the potential sale and trade vehicles.

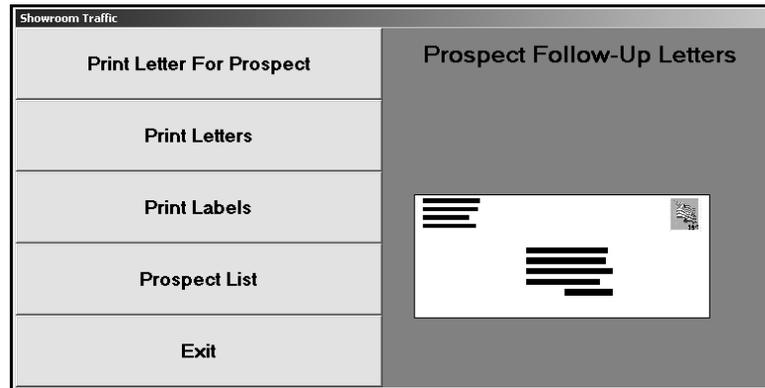
1. Select the prospect. The prospects information fills in on the Enter Prospects screen.
2. Click **Print**.
3. When prompted to verify your printer is ready, select your print criteria.

Deleting a Prospect

1. Select the prospect.
2. Click **Delete**.
3. Click **OK** when prompted to verify you want to delete the record.

Chapter 20 Prospect Follow-Up Letters

You use the Prospect-Up Letters menu to print followup letters and mailing labels. When printing letters, you must specify the letter you want to print. Once you select the letter, the system prompts you to enter the signature and title that should print on the letter. Your letter must contain merge fields for the sender’s name (\SG) or salesperson’s name (\SM) and title (\TI) on the signature line, or the system will not pull the information you enter. Remember, you have the option of printing the letter or viewing the letter on your screen. Viewing the letters on your screen allows you to preview the letter before printing the final copy.



Print Letter For Prospect

Use this button to print a followup letter for a specific prospect.

1. Click **Print Letter For Prospect**.
2. Type the prospect number, or click the “Click for list” message to display a list of prospects. Click the prospect you want to select.
3. Type the letter number you want to print for the customer, or select the letter from the drop-down list.
4. The salesperson’s name automatically fills in the signature field. This is the salesperson entered on the Enter Prospect screen. If another name needs to print on the signature line, type the name in this field. Press ENTER to accept the name.
5. The **Title** field automatically defaults to “Your Salesman.” Type the title you want to print on the letter. Press ENTER.
6. When prompted to verify your printer is ready, select your print criteria.

Print Letters

Use this button to print a letter for all the prospects that were entered into the system on a specific date.

1. Click **Print Letters**.
2. Type the date. You must enter the date in an eight-character format with or without slashes (mm/dd/yyyy or mmdyyy). If you do not use slashes, press ENTER after you enter the date.
3. Type the letter number you want to print for the customer, or select the letter from the drop-down list.
4. The salesperson's name automatically fills in the signature field. This is the salesperson entered on the Enter Prospect screen. If another name needs to print on the signature line, type the name in this field. Press ENTER to accept the name.
5. The **Title** field automatically defaults to "Your Salesman." Type the title you want to print on the letter. Press ENTER.
6. When prompted to verify your printer is ready, select your print criteria.

Print Labels

Use this button to print mailing labels for all the prospects that were entered into the system on a specific date.

1. Click **Print Labels**.
2. Type the date. You must enter the date in an eight-character format with or without slashes (mm/dd/yyyy or mmdyyy). If you do not use slashes, press ENTER after you enter the date.
3. When prompted to verify your printer is ready, select your print criteria.

Tip: Although you can select to print to screen to preview the labels, only print the labels from Autosoft FLEX DMS. This ensures your labels will print properly.

Prospect List

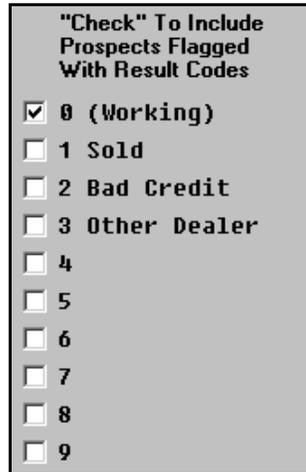
Use this button to view a list of prospects. The list displays the prospect number, salesperson's number, prospect's name, and first visit date. The list also identifies if the prospect has been "sold," if the salesperson is still "working" with the prospect, or if the salesperson entered another result on the Enter Results screen for the prospect.

Chapter 21 Reminder Lists & Worksheets

This button advances you to the Print Traffic Reminders & Daily Work Sheets menu. This menu allows you to print various reminder lists and worksheets to use to follow up on prospective sales.



The right side of the menu allows you to specify the prospects you want to include when generating the lists. It lists the result codes you created in the system setup. Any prospect in the system is considered “working” until you select a different result on the Enter Results screen. Selecting the result codes to use provides even more flexibility when generating the lists and reminders.



Click the box next to the code you want to select. A checkmark appears in the box to indicate you selected the code. Click the box again to clear the checkmark. You should verify this setup before you print any lists or reminder to ensure the correct prospect information prints.

Reminder List For Salesman

Use this button to print a reminder list for a salesperson. The reminder list displays the salesperson's name, the prospect's address, phone number, contact dates, type of vehicle the prospect is looking for, the vehicle the prospect looked at, and information about the trade vehicle. The list also displays the customer source code, result, and any comments entered on the Enter Prospects screen. The end of the list displays the total number of prospects on the salesperson's reminder list.

1. Click **Reminder List For Salesman**.
2. Type the salesperson's number, or select the salesperson from the drop-down list. If you want to print reminder lists for all of the salespeople, type 00.
3. Type the date range you want to use to generate the list. This date is based on the existing Last Contact Date in the prospect record. You must type the date in an eight-character format with or without slashes (mm/dd/yyyy or mmdyyy).
4. Click **OK** to accept the dates.
5. When prompted to verify your printer is ready, select your print criteria.

Reminder List For Prospect

Use this button to print a reminder list for a specific prospect. The reminder list displays the salesperson's name, the prospect's address, phone number, contact dates, type of vehicle the prospect is looking for, the vehicle the prospect looked at, and information about the trade vehicle. The list also displays the customer source code, result, and any comments entered on the Enter Prospects screen.

1. Click **Reminder List For Prospect**.
2. Type the prospect number, or click the "Click for list" message to display a list of prospects. Click the prospect you want to select.
3. When prompted to verify your printer is ready, select your print criteria.

Managers Reminder List

Use this button to print a list of all of the prospects that came into the dealership during a specific date range. The results of the Manager's Reminder List depend on whether the **Looking For** section of the Enter Prospect screen indicates a new (N) or used (U) vehicle. If this field is omitted, the prospects will not appear on the Manager's Reminder List. The list will exclude any prospects that have been flagged **1** (Sold) on the Enter Results screen.

The printout groups all of the prospects looking for new vehicles together and all of the prospects looking for used vehicles together. The reminder list displays the salesperson's name, the prospect's address, phone number, contact dates, type of vehicle the prospect is looking for, the vehicle the prospect looked at, and information about the trade vehicle. The list also displays the customer source code, result, and any comments entered on the Enter Prospects screen. The end of each section displays the total number of prospects in the new or used group.

1. Click **Managers Reminder List**.
2. Type the date range you want to use to generate the list. You must enter the dates in an eight-character format with or without slashes (mm/dd/yyyy or mmddyyyy).
3. Click **OK** to accept the dates.
4. When prompted to verify your printer is ready, select your print criteria.

Prospect 'Trade In' List

Use this button to print a list of the potential trade-in vehicles. The system scans the fields in the **Trade** section on the Enter Prospects screen to generate this list. If the salesperson omits this information on the prospect screen, the system cannot generate the report. The list displays the vehicle's year, make, model, actual cash value, and condition, as well as the prospect's name.

1. Click **Prospect 'Trade In' List**.
2. Type the date range you want to use to generate the list. You must enter the dates in an eight-character format with or without slashes (mm/dd/yyyy or mmddyyyy).
3. Click **OK** to accept the dates.
4. When prompted to verify your printer is ready, select your print criteria.

Prospect 'Look For' List

Use this button to print a list of prospects and the type of vehicle they are looking to buy. The system scans the fields in the **Looking For** section on the Enter Prospects screen to generate this list. If the salesperson omits this information on the prospect screen, the system cannot generate the report. For each prospect on the list, it displays if the prospect is looking for a new or used vehicle, the type of vehicle the prospect is looking for, the target price, the salesperson working with the prospect, the date the prospect came to the dealership, and the trade vehicle's information.

1. Click **Prospect 'Look For' List**.
2. Type the date range you want to use to generate the list. You must enter the dates in an eight-character format with or without slashes (mm/dd/yyyy or mmdyyy).
3. Click **OK** to accept the dates.
4. When prompted to verify your printer is ready, select your print criteria.

Prospect 'Looked At' List

Use this button to print a list of the vehicles in your inventory prospects have looked at while at the dealership. The system scans the **Stock** field in the **Looking For** section on the Enter Prospects screen to generate this list. If the salesperson omits this information on the prospect screen, the system cannot generate the report. For each vehicle on the list, it displays the stock number, year, make, and model. It also lists the prospect's name, quoted price, salesperson, date of the first visit, and trade information.

1. Click **Prospect 'Looked At' List**.
2. Type the date range you want to use to generate the list. You must enter the dates in an eight-character format with or without slashes (mm/dd/yyyy or mmdyyy).
3. Click **OK** to accept the dates.
4. When prompted to verify your printer is ready, select your print criteria.

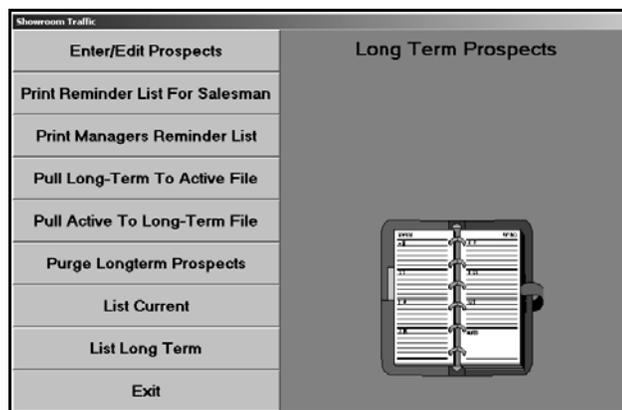
Print Daily Worksheets

Use this button to print a list of the prospects flagged to be contacted on the current day. The system generates this list based on the **Next Contact** field on the Enter Prospects screen.

1. Click **Print Daily Worksheets**.
2. When prompted to verify your printer is ready, select your print criteria.

Chapter 22 Long-Term Prospects

You use the Long-Term Prospects menu to enter and track long-term prospects. These individuals are not ready to purchase a vehicle when they come to the dealership, but you want to track them anyway. The options allow you to print long-term prospect reminder lists so you do not forget about these prospects. You can also use the menu to make long-term prospects active prospects when they are ready to buy or to change an active prospect into a long-term prospect.



Enter/Edit Prospects

Use this button to open the Long-Term Prospects screen to enter prospects. You enter the same information for long-term prospects that you enter for current prospects: the customer's information, information about the vehicle the customer is looking for, and information about the customer's potential trade-in vehicle. You also indicate the next date you want to contact the prospect. The system uses this date when it is generating followup lists and letters.

Print Reminder List For Salesman

Use this button to print a reminder list for long-term prospects. You indicate the month and year you want to use for the list. The system looks at the **Next Contact** field to determine which prospects it needs to add to the list. This list can provide a month-at-a-glance followup summary for a salesperson. The list prints complete customer-contact information for each prospect.

1. Click **Print Reminder List For Salesman**.
2. Type the salesperson's number, or select the salesperson from the drop-down list. If you want to print reminder lists for all of the salespeople, type 00.
3. Type the month and year you want to use to generate the list.
4. When prompted to verify your printer is ready, select your print criteria.

Print Managers Reminder List

Use this button to print a reminder for managers. This list prints all of the long-term prospects each salesperson needs to contact during a specific month and year. This allows sales managers to check with salespeople to ensure they are conducting their follow-up.

1. Click **Print Managers Reminder List**.
2. Type the month and year you want to use to generate the list.
3. When prompted to verify your printer is ready, select your print criteria.

Pull Long-Term To Active File

Use this button to make a long-term prospect's file an active prospect file. This moves the prospect from the Long-term prospect list to the current prospect list.

1. Click **Pull Long-Term To Active File**.
2. Type the prospect number, or click the "Click for list" message to select the prospect.
3. Click **OK** when prompted to verify you want to merge the file.

Pull Active To Long-Term File

Use this button to make an active prospect's file a long-term prospect file. This moves the prospect from the current prospect list to the long-term prospect list.

1. Click **Pull Active To Long Term File**.
2. Type the prospect number, or click the "Click for list" message to select the prospect.
3. Click **OK** when prompted to verify you want to merge the file.

Purge Long-Term Prospects

Use this button to delete all the long-term prospect files older than a specified number of months.

1. Click **Purge Long-Term Prospects**.
2. Type the number of months you want to use to delete the records. The system deletes all prospect files older than the number of months you enter.
3. Click **OK** when prompted to verify you want to purge the files.

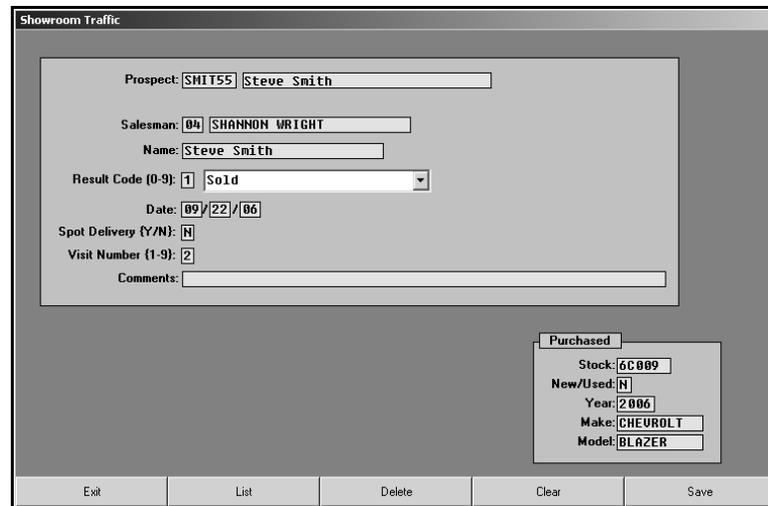
Use the last two buttons on the menu to view the prospect lists.

List Current: The current list is the list of prospects entered using the **Enter Prospects** button on the Showroom Traffic main menu.

List Long Term: The long-term prospect list is the list of prospects entered using the **Enter/Edit Prospects** button on this menu.

Chapter 23 Enter Results

When you are finished with a prospect, click **Enter Results** to record the result for the prospect. The information on this screen pulls from the Enter Prospects screen. You can edit the information as needed. The activity reports and traffic reports use the result codes to generate the activity and sales statistics. The accuracy of the reports depends on the accuracy of the information you enter here.



Showroom Traffic

Prospect: SMIT55 Steve Smith

Salesman: 04 SHANNON WRIGHT

Name: Steve Smith

Result Code (0-9): 1 Sold

Date: 09/22/06

Spot Delivery (Y/N): N

Visit Number (1-9): 2

Comments:

Purchased

Stock: 6C009

New/Used: N

Year: 2006

Make: CHEVROLET

Model: BLAZER

Exit List Delete Clear Save

Entering a Result

1. Click **Enter Results**.
2. Type the prospect number, or click **List** to select the prospect. Click the prospect you want to select from the list that appears.
3. The prospect's information fills in on the screen.
4. Type the result code, or select the code from the drop-down list. The list displays all of the codes you entered on the Miscellaneous Parameters screen in the system setup.
5. The **Date** field automatically defaults to the system date when you enter a result code 1-9. You can edit this field as needed. The date should be the date you want to record as the ending date for the prospect file. For sales, this is the sale date. No date fills in for a blank or zero result code.
6. Use the **Spot Delivery** field to indicate if this was a spot delivery. This means the customer walked off the lot with the vehicle on the first visit. Type **Y** for yes or **N** for no.
7. Edit the **Visit Number** field so it reflects the appropriate number of visits the prospect made to the dealership.

8. The **Comments** field displays the comments from the first comment line on the Enter Prospects screen. Edit the field as needed.
9. If you entered a stock number for a vehicle in your stock in the **Looking For** section on the Enter Prospects screen, the vehicle information fills in the **Purchased** section on the bottom of the Results screen. Edit these fields, or enter the purchased vehicle's information in these fields as needed.
10. Click **Save** to save the information.

Deleting a Prospect

You can delete a prospect from this screen. This removes the prospect's record from the system. Make sure you want to delete the prospect file. Once you delete it, you cannot get it back.

1. Select the prospect.
2. Click **Delete**.
3. Click **Gone** when prompted to verify you want to delete the record.

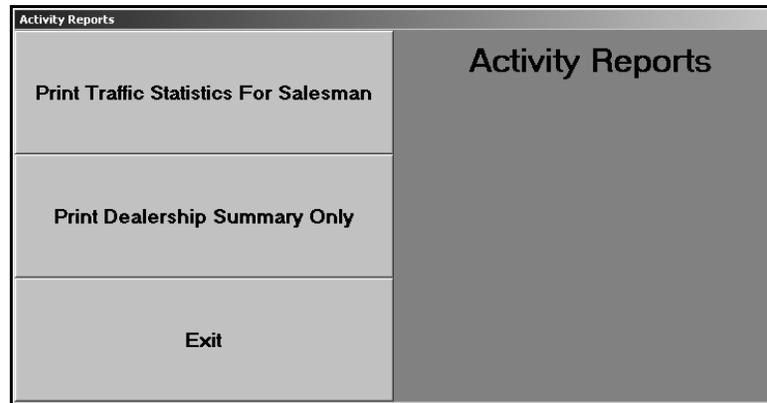
Chapter 24 Reports

You can print two types of reports for your prospects: activity reports and traffic reports. The activity reports allow you to print statistics for salespeople and the dealership about the prospects. The system uses all of the prospect files to generate the activity reports. The traffic reports are sales reports that allow you to check the sales statistics for the salespeople and the dealership. The system only uses prospects with a result code of 1 (Sold) to generate traffic reports.

Activity Reports

This button advances you to the Activity Reports menu. The date ranges you specify for the reports apply to the First Contact date entered for the active prospects on the Enter Prospect screen. The date entered in the **From** field when specifying the date ranges you want to use for the reports determines the earliest First Contact date that will be included on the report. The program does not use the date entered when the prospect is flagged as sold with code 1 on the Enter Results screen for any of the Activity reports.

If you are performing the Traffic End-of-Month Update (from the System Setup & Updates menu), your active list of prospects will be current and valid. The End-of-Month Update removes the prospects flagged as sold (code 1) on the Enter Results screen and tabulates statistics for the number of months specified on the Miscellaneous Parameters screen in the Traffic system setup.



Print Traffic Statistics For Salesman

Use this button to print traffic statistics for a specific salesperson or all salespeople. A summary prints for each salesperson on the report. Each summary lists the salesperson's prospects and indicates the actions take with each prospect (based on the actions entered on the Miscellaneous Parameters screen in the system setup). The summary also indicates the source that brought the prospect to the dealership, the number of visits, and if this was a spot delivery. The end of each summary lists the salesperson's total prospects, the total sales, and the closing ratio and indicates if the salesperson is on target with the goal or by how much the salesperson missed the goal. The end of the report provides a summary for the whole dealership.

1. Click **Print Traffic Statistics For Salesman**.
2. Type the salesperson's number, or select the salesperson from the drop-down list. If you want to print statistics for all salespeople, type 00.
3. Type the date range you want to use to the report. You must enter the date in an eight-character format with or without slashes (mm/dd/yyyy or mmddyyyy).
4. Click **OK**.
5. When prompted to verify your printer is ready, select your print criteria.

Print Dealership Summary Only

Use this button to print traffic statistics for the dealership. The same summary prints at the end of the Print Traffic Statistics for Salesman report.

1. Click **Print Dealership Summary Only**.
2. Type the date range you want to use to the report. You must enter the date in an eight-character format with or without slashes (mm/dd/yyyy or mmddyyyy).
3. Click **OK**.
4. When prompted to verify your printer is ready, select your print criteria.

Traffic Reports

The Sales Reports menu allows you to print sales reports for the dealership and salespeople for a specific date range. The menu also contains an option that allows you to print a customer source report to see where customers are hearing about your dealership. This report is useful when considering the marketing strategies your dealerships will use.



Print Store Sales Stats

Use this button to print sales statistics for the dealership based on the date range you specify. The report displays the dealership's total prospects, sales, gross, commission, and closing ratio.

1. Click **Print Store Sales Stats**.
2. Type the dates you want to use for the report. You must enter the dates in an eight-character format with or without slashes (mm/dd/yyyy or mmdyyy). If you do not enter slashes, press ENTER after each date.
3. When prompted to verify your printer is ready, select your print criteria.

Print Sales Stats For Salesman

This option is currently unavailable.

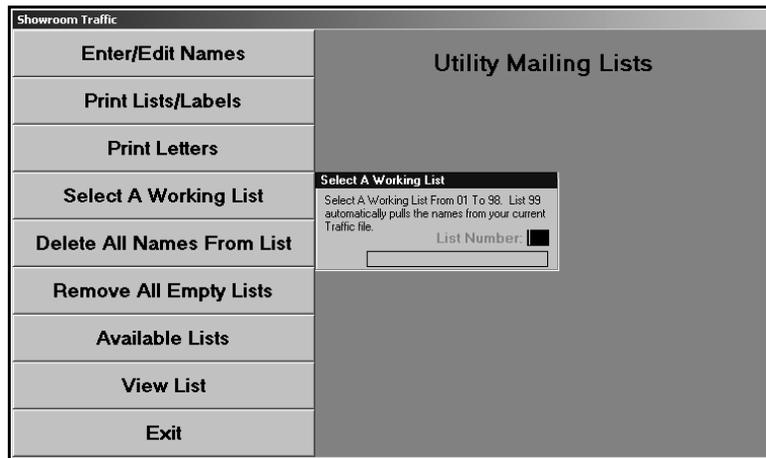
Customer Source Report

Use this button to print statistics for the customer sources. The report lists each customer source and indicates the number of customers that came into the dealership because of each source for the current year and the previous year.

1. Click **Customer Source Report**.
2. When prompted to verify your printer is ready, select your print criteria.

Chapter 25 Utility Mailing Lists

The Utility Mailing Lists menu allows you to create up to 98 lists you can use to print mailing labels and customer letters. Printing letters from this menu provides a bit more flexibility. When you print letters from the Prospect Follow-Up Letters menu, you can only select customers who have prospect files in the Showroom Traffic module. This menu allows you to pull your current prospects to the list you create, and it allows you to add customers who do not have prospect files to the list. This is useful when you want to send someone a letter but do not want to enter the individual as a prospect.



The system prompts you to select a working list as soon as the menu appears. When you want to create a new list, type the number for the list you are creating. To manually create a list, type a number from 01 to 98. Click **Yes** to create the new list. The number you entered becomes the list ID for the list you are going to create.

To pull your current prospect files, type 99 as the working list. Click **New** when prompted to verify you are pulling the list from the traffic files.

If you need to change the list, click **Select Working List** to display the data list again. You can also click **Available Lists** to select the working list. Use the **View List** button to display the list of prospects on the selected list. This helps you ensure you have selected the correct list.

Enter/Edit Names

Use this button to open the Enter Mailing List Names screen to add customers to the mailing list or to edit customers already on the mailing list.

The screenshot shows the 'Enter Mailing List Names' screen within the 'Showroom Traffic' application. The form contains the following fields and values:

- Name Code: SMIT55
- Active/Inactive: A
- Class: A
- Name: Steve Smith
- Address: 555 Main Street
- City: West Middlesex, PA
- State: 16159
- Salutation: Steve
- Contact: (empty)
- Phone: 724 555 0010
- Current Vehicle:
 - Year: (empty)
 - Make: (empty)
 - Model: (empty)

At the bottom of the screen, there are five buttons: Exit, List, Delete, Clear, and Save.

Adding a New Prospect

Entering a prospect on this screen only adds the prospect to the utility list. It does not create a prospect file for the customer. If you want to create a prospect file, enter the prospect's information using the **Enter Prospect** button on the Showroom Traffic menu.

1. Click **Enter/Edit Names**. The Enter Mailing List screen appears.
2. In **Name Code**, type a customer code for the prospect. The code can be up to six alphanumeric characters and should follow your dealership's method for assigning customer/prospect numbers.
3. Use the **Active/Inactive** field to indicate if the prospect is active or inactive. Type **A** for active and **I** for inactive. Letters will only print for active prospects.
4. In **Class**, type the class code you want to assign the prospect. Assigning a class code is a way of uniquely identifying a particular type or group of prospects. You may even consider this class as way to rank a prospect. You can select to print prospect lists, mailing labels, and letters for a specific group of prospects based on the class.
5. Type the prospect's name and address, and type the name that should print on the salutation line of the letter.
6. In **Contact**, type the prospect's contact person at the dealership.
7. Type the prospect's phone number.
8. Use the **Current Vehicle** section to record information about the prospect's potential trade-in vehicle.
9. Click **Save** to save the prospect's information.

Editing an Existing Prospect's Information

1. Type the name code, or click **List** to select a prospect.
2. The prospect's information fills in on the screen.
3. Edit the information as needed.
4. Click **Save** to save the changes.

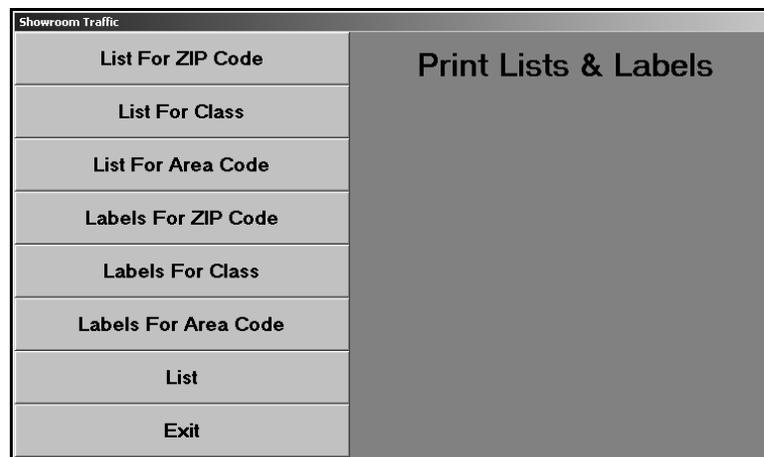
Deleting a Prospect from the List

Deleting the prospect from the list does not delete the prospect's record from the system unless you entered the prospect on this screen. If you entered the prospect on this screen, the prospect's information is deleted when you delete the prospect from the list.

1. Select the prospect.
2. Click **Delete**.
3. Click **OK** when prompted to verify you want to delete the record.

Print Lists/Labels

This button advances you to the Print Lists & Labels menu. This menu allows you to print mailing lists and labels by ZIP Code/Postal Code, class, or area code. You needed to enter a class on the Enter Mailing List Names screen in order to print by class. Use the **List** button to view the list of prospects on the mailing list.



Tip: Although you can select to print to screen to preview the labels, only print the labels from Autosoft FLEX DMS. This ensures your labels will print properly.

List For ZIP Code

Use this button to print a list of the prospects on the mailing list with a specific ZIP Code.

1. Click **List For ZIP Code**.
2. Type the ZIP Code, or leave the field blank to print a list for all ZIP Codes.
3. When prompted to verify your printer is ready, select your print criteria.

List For Class

Use this button to print a list of the prospects on the mailing list with a specific class code. You entered the class code on the Enter Mailing List Names screen.

1. Click **List For Class**.
2. Type the class code you want to use.
3. When prompted to verify your printer is ready, select your print criteria.

List For Area Code

Use this button to print a list of the prospects on the mailing list with a specific area code.

1. Click **List For Area Code**.
2. Type the area code you want to use.
3. When prompted to verify your printer is ready, select your print criteria.

Labels For Zip Code

Use this button to print mailing labels for prospects on the mailing list based on ZIP Code.

1. Click **Labels For ZIP Code**.
2. Type the ZIP Code, or leave the field blank to print labels for all ZIP Codes.
3. When prompted to verify your printer is ready, select your print criteria.

Labels For Class

Use this button to print mailing labels for prospects on the mailing list based on class code.

1. Click **Labels For Class**.
2. Type the class code you want to use.
3. When prompted to verify your printer is ready, select your print criteria.

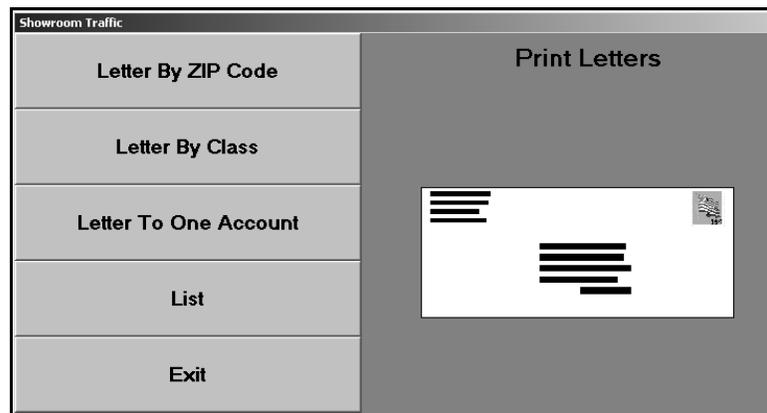
Labels For Area Code

Use this button to print mailing labels for prospects on the mailing list based on area code.

1. Click **Labels For Area Code**.
2. Type the area code you want to use.
3. When prompted to verify your printer is ready, select your print criteria.

Print Letters

This button advances you to the Print Letters menu. You use this menu to print letters for prospects on the current utility list. Use the **List** button to view the list of prospects on the mailing list. You can select to print letters base on ZIP Code or class. You needed to enter a class on the Enter Mailing List Names screen in order to print letters by class. You can also select to print a letter for one prospect on the list.



1. Click the button that corresponds to the letter you want to print.

Letter By Zip Code: Use this button to print letters for prospects based on the ZIP Code you specify.

Letter By Class: Use this button to print letters for all of the prospects that have a specific class code. You entered the class code on the Enter Mailing List Names screen.

Letter To One Account: Use this button to print a letter for one prospect on the mailing list.

2. Type the ZIP Code, class, or account number you want to use for the letter.
3. Next, type the letter number, or click the “Click for list” message to select the letter.
4. Finally, type the name and title that should print on the signature line.
5. When prompted to verify your printer is ready, select your print criteria.

Delete All Names From List

Use this button on the Utility Mailing List menu to delete a list. This removes the list from the system. The information for any prospects you entered using the **Enter/Edit Names** button on this menu will not be available. You will have to add the prospect's information again if you want include the prospect on lists or print labels and letters for the prospect.

1. Click **Delete All Names From List**.
2. Type the list number.
3. Click **OK** when prompted to verify you want to delete the records.

Remove All Empty Lists

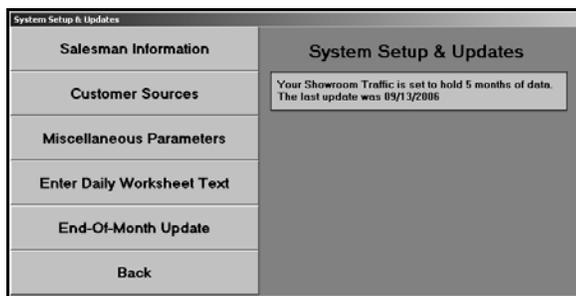
Use this button to delete all the empty mailing lists. This removes the lists from the system.

1. Click **Remove All Empty Lists**.
2. Click **OK** when prompted to verify you want to delete the records.
3. The system returns you to the Showroom Traffic menu.

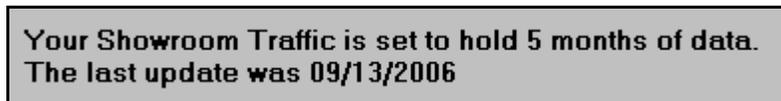
Chapter 26 End-of-Month Update

At the end of the month, you must update the traffic files. The update removes all of the completed/sold. The system holds "open" prospect information for the number of months specified using the Miscellaneous Parameters option. The screen will display the number of months the system is set to retain the prospect files and the date of the last update for your reference.

1. Click **System Setup & Updates** on the Showroom Traffic menu.
2. The System Setup & Updates menu appears.



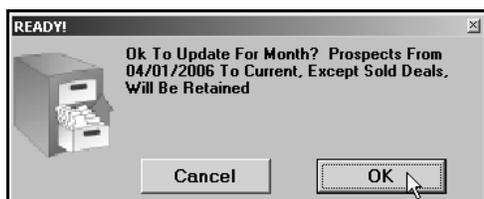
3. The box under the menu title displays the number of months the system is set to retain the data and the date of the last showroom traffic monthly update.



4. Click **End-of-Month Update** on the System Setup & Updates menu.
5. Type the month and year you are updating.



6. The system will indicate the date that will be used to retain the prospect information. Click **OK** to continue with the update.





Part IV Marketing