



Mod 101: Sales Training (Full Version/Desking)

1A. Basic Introduction

To get logged onto the Autoclick system Go to: www.autoclick.com

- In the top right hand corner you will see a link to Log-In. Click on this and enter your email address in the e-mail field and your assigned password in the password field.
- Click the green arrow or press the enter key on your keyboard.
- You will see the validating user credential box as you get logged onto the system.
(Note: A windows logon box might appear behind the validating user credentials box. Click on the box to bring it to the forefront and select whether or not you would like windows to remember your logon information. You will only be asked this once.)

Once you've logged onto the system you will viewing the Dashboard.

- The Dashboard will be page you will be working from the majority of the time.
- 80% - 90% of everything that can be done in the system can be done from the Dashboard.

The Sales Pipeline Summary is located at the top of your Dashboard

This is where you will view your customers that are currently in the market to purchase a vehicle or a brand new internet lead. The **Status** of all customers on your Sales Pipeline Summary will be Active.

The standard layout of each page will include:

Everything on the left hand side of your screen including:

1. **Search:** Where you can search the database for customers or vehicles.
2. **Navigate Bar:** Where you can navigate to other places in the system.
*Note: Home, a subtopic located within the **Navigate Bar** is synonymous with the Dashboard. If you leave the Dashboard to navigate to other places within the system you can return to the Dashboard by clicking on **Home** in the navigate bar.*
3. **Recent:** The last 5 most recently accessed client information screens or Contact Ticket numbers.

Everything at the top of your screen including:

1. The New Bar:



- A link to **create a new E-mail**. *Note: This is not associated with a customer, but one can be added to the email via a client search.*
- A link to **create a new Task**. *Note: This is not associated with a customer, but one can be added to the task via a client search.*

- A link to **create a new Appointment**. *Note: This is not associated with a customer, but one can be added to the appt. via a client search.*
- A link to **create a new Client** *Note: This is for entering Inactive clients into the database and is generally only used for customer uploads.*
- A link to **create a new Vehicle**. *Note: This is for creating a vehicle in the system if it has not already been created.*
- A link to **create a new Client Contact Ticket**. *Note: This is where you can enter your Active customers into the database.*
- A link to **create a new Sales Opportunity**. *Note: This is where you can enter your Active customers into the database.*

2. The links in the top right hand corner of the screen:

- **Support:** If at anytime during your usage you need to contact technical support, this link is available.
- **Contact Us:** This will give you information for our Business Dept & Training Dept.
- **Help:** This is an online help guide.
- **Logout:** We ask that you logout using this link in the top right hand corner of the Autoclick screen instead of exiting out of the page by clicking the X in the top right hand corner of your internet screen.

A couple of things to remember while you're in the system


- Everything underlined and written in **BLUE** is a Link.
- Every page will be titled in the top left hand corner of the screen.
- Always use a single left click when navigating in the system.

2A. Entering a Phone-Up or Walk-In Client into the Autoclick system

There are two ways to enter customers into the Autoclick system:

- **Sales Opportunity**
- **Client Contact Ticket**

Note: Your Internet leads are automatically uploaded into the system and a Client Contact Ticket/Sales Opportunity is created for them at that time.

1. **Sales Opportunity:** A great tool used to help you enter vital information into the Autoclick system for your customers at the beginning of the sales process. This option is preferred for entering phone-ups into the system, but can be used to enter customers of any contact type.
 - You start this process by clicking on the create a New Sales Opportunity  icon in the New Bar in the upper left portion of the page
 - Select **Customer Type?**
 - Click Next.


 **Create a New Sales Opportunity**
 Perform the following steps to create a new Sales Opportunity.
[Determine Customer Type](#) -> [Enter Customer Information](#) -> [Search](#) -> [Complete](#)

Select Customer Type (required to proceed)

In Store
 Internet
 Phone
 Service

Next [Cancel](#)

- Enter the Customers information *(Note: Enter as much Customer information as you can, although only the Customers' name and phone number are required. The more information you enter the better chance you have of contacting them in the future. ***Remember to use correct capitalization.)*
- To schedule an appointment for the customer at this time:
 - Click on the calendar icon to the right of Appt Date/Time and click on the proper date.
 - Select the start time of the appointment from the drop down menus. *(Note: if you enter the customers email address an appointment reminder will go out to the customer with the date and time of the appointment and your contact information 1 day before the appointment.)*
- In the Notes Section enter the following:
 - What happened on the visit?
 - Customer requests?
 - Next step in the sale?
- Click Next

 **Create a New Sales Opportunity**
 Perform the following steps to create a new Sales Opportunity.
[Determine Customer Type](#) -> [Enter Customer Information](#) -> [Search](#) -> [Complete](#)

Enter Customer Information

To proceed you must enter a name and phone number.

First Name
Last Name
Phone Number <- select ->
Email Address
Appointment Date/Time :
How did you hear about us? Referral
Street Address
City, State Zip Code ,
Employer
Credit Situation Good Credit
When do you want to buy? One Week
Do you have pay stubs? Not Entered Yes No
Do you have proof of residency? Not Entered Yes No

Notes

Sylvester called today and wanted info on the 2007 Escalade. He is going to come in on Friday to look at what we ha

[Previous](#) [Next](#) [Cancel](#)

Autoclick will now search the system for any names that match the information you have entered (see below). If the customer is already in the system you can find their name, address, phone number and salesperson associated with them at this time. (Note: if your customer is already in the system and is associated with another salesperson check your dealership rules on how to proceed.)

- You will be asked, “Is the Customer already in the system”?
- If your customer is already in the system click on Yes next to your Customers’ information.
- If they are associated with another salesperson at the dealership check your dealership rules on how to proceed.
- If your customer is not already in the system leave a check mark in the box next to No and click next.
- The Customer information you entered in the previous step will be used to Create a New Client Contact Ticket.

Create a New Sales Opportunity
Perform the following steps to create a new Sales Opportunity.
Determine Customer Type -> Enter Customer Information -> Search -> Complete

Is your customer in the list below?

First Name	Last Name	Company	Street Address	City	State	Zip Code	Home Phone	Work Phone	Salesperson
------------	-----------	---------	----------------	------	-------	----------	------------	------------	-------------

No, the customer is not in the list above. I want to create a new customer us

[Previous](#) [Next](#) [Cancel](#)

After clicking on Next you will be taken to a screen (shown below) that will provide you with confirmation as to what information you have completed. The completion of the information is shown in the system as **DONE** after each category of Customer information.

Create a New Sales Opportunity
Perform the following steps to create a new Sales Opportunity.
Determine Customer Type -> Enter Customer Information -> Search -> Complete

Creating Customer...DONE
Creating Phone Number...DONE
Creating Sales Opportunity...DONE
Creating Appointment...DONE
Adding Salesperson to Appointment...DONE

You can view your new **Sales Opportunity/Client Ticket** by clicking [here](#).
You can view your **Customer** by clicking [here](#).
You can take a new **Credit Application** for this Customer by clicking [here](#).


You now have 3 options:

1. You can view your new **Sales Opportunity/Client Ticket** by clicking [here](#).
 - Select this option to add inventory to the customers Contact Ticket and to start a deal.
2. You can view your **Customer** by clicking [here](#).
 - Select this option to view your customer’s information screen where you can view your customer’s history, flag your customer, create a task for the client, etc.
3. You can take a new **Credit Application** for this Customer by clicking [here](#).
 - Select this option to take a new Credit Application for the customer

As a quick and convenient way of accessing the Sales Opportunity we have provided you with steps to create a link as a shortcut. This shortcut will place your Sales Opportunity entry form right on your desktop. Just follow the steps listed below.

- Go to Internet Explorer and type in the address listed below in your address bar:
<http://www.autoclick.com/salesopportunities/salesopportunitywizard.aspx>
- Once you have accessed the website right click and choose Create Shortcut.
- This will place a shortcut to the Sales Opportunity on your computers desktop.
- If you are not already logged onto Autoclick the system will ask you to logon before opening up the Sales Opportunity.

2. Create a New Client Contact Ticket: A great tool used to help you enter vital information into the Autoclick system for your customers at the beginning of the sales process. This option is preferred for entering walk-ins into the system, but can be used to enter customers of any contact type.

- You start this process by clicking on the Create New Client Contact  icon in the New Bar in the upper left portion of the page.
- **Search** for the client in the database by entering customer's Last Name and clicking on Search. *(Remember to use correct capitalization.)*
- The system will show you a list of results that match your search criteria. The results show the Customers Name, Company, Address, Email Address, and the Salesperson the customer is associated with.
 - **Is the customer already in the database and associated with another salesperson?** If yes check your dealership rules on how to proceed.
 - **Is the customer already in the database and you are listed as the salesperson?** If yes, then click on the customers name and proceed to the Notes section.
 - **Is the customer not in the search results?** Input the rest of the customers' information and click on Search.
- In the **Notes** Section enter the following:
 - What happened on the visit?
 - Customer requests?
 - Next step in the sale?
- **Select Contact Type:** In this Section you will choose how the customer contacted you.
- **Create New Client Contact:** This button is also a save button and needs to be clicked for your information to be saved.



The screenshot shows a web browser window with the title "NEW CLIENT CONTACT LOG ENTRY". At the top, there is a green button labeled "Create New Client Contact". Below this, the "CLIENT CONTACT INFO:" section includes a dropdown for "Employee" (Meguire, Robin) and a dropdown for "Contact Type" (In Store). The "NOTES:" section contains a text area with the entry: "Amber came in and test drove the 2005 Lexus. She is going to bring her trade in on Saturday the 14th." Below the notes is the "CLIENT INFORMATION:" section, which includes fields for "First Name" (Amber), "Last" (Test), "Company", "E-Mail" (amber@aol.com), "Address" (4857 Willow Way), "Home #" (9485958474), "Work #" (9485548598), and "City, State, Zip" (Columbus OH 43094). At the bottom of the form, there is a table with columns: Client, Company, Address, Email, Salesperson, and a message "No Clients Found."

3A. Filling out the Client Contact Ticket:

The next page you will be viewing is the second portion of the Client Contact Ticket/Sales Opportunity. On this page you will enter more detailed information about the customer contact.

CLIENT CONTACT #2469395 FOR SYLVESTER THOMPSON

You must have at least 1 item before you can start a deal.

CLIENT CONTACT INFORMATION: View **GENERAL** EXTENDED Information

Created On: 12/26/2006 12:46:38 PM

Flag: [Dropdown]

Status: Reviewed:

Salesperson: Mogouirk, Brent

Type: Phone

Weather: Sunny

Why did they contact us?

AutoTrader.com
 Autoweab.com
 Cars.com
 Dealership Website
 Direct Mail Campaign

What did they do?

01- Meet and Greet
 02- Fact Find
 03- Select a Unit
 04- Walk Around
 05- Demo

ITEMS INTERESTED-IN: [Input] Find Item Create Item Create Locate

Stock #	Year	Make	Model	Color	List Price
Please Add Items Interested-In					

TRADE-INS: Find Item Create Trade

Stock #	Year	Make	Model	Color
Please Add if any Trade-Ins				

- **Flag** the customer with the appropriate flag. Each flag icon represents where each customer is in the buying process. (Note: Check with your Dealership for details regarding what each flag icon represents within your dealership.)
- **Why did they contact us?** Check the box that represents what advertising prompted the customer to contact your dealership.
- **What did they do?** Check the boxes that represent what the customer did on their visit if applicable.
- **Items Interested In:**
 - Find Item: By entering the stock number for the vehicle in the field and clicking on the find item button. This will display the Item Search pop-up.
 - Next locate your vehicle at the bottom of this screen. If the correct vehicle is displayed return it to the contact ticket by checking the box to the left of the stock number and clicking on Return.
 - If your vehicle is not displayed at the bottom of this screen you can use the top portion of this screen to help you find it. Fill in your search criteria and click on Search. If the correct vehicle is displayed return it to the contact ticket by checking the box to the left of the stock number and clicking on Return.

FIND AN ITEM

Source: <- Select A Source -> Transmission: Automatic Standard

Status: Stock Speeds: <- Select Speeds ->

Classification: <- Select A Class -> Transaxle Type: <- Select A Transaxle ->

Stock #: P123 Engine: Gas Diesel

Year From: <- Year -> To: <- Year -> Engine Size: <- Select Cylinders ->

Make: <- Manufacturer -> Condition: <- Condition ->

Model: Interior Trim: <- Select A Trim ->

Model Code: Exterior Color:

VIN:

Mileage (less than):

Stock #	Year	Make	Model	Color	List Price	Age	Status	Dealership
P123	2005	LEXUS	LS 400		\$27500	0	Stock	AutoClick Training Dealership

- Create an Item: If the vehicle is not in the list returned by a stock number search or it has not yet been assigned a stock number in your dealership click on Create Item.
 - Next, enter all information listed in red and any other detailed information about the vehicle and click Save and Close located at the bottom of this page.

EDIT ITEM

Source: <- Source -> Transmission Type: Automatic Standard

Status: Stock Speeds: (- Select Speeds -)

Location: AutoClick Training Dealership Transaxle: (- Select A Transaxle -)

Classification: (- Select A Classification -) Transaxle Description:

Stock Number:

Year: <- Year -> Engine Type: Gas Diesel

Make: <- Manufacturer -> Engine Size: (- Select Cylinders -)

Model: Engine Description:

Model Code:

Body Style:

VIN Number:

Mileage:

Condition: <- Condition ->

Interior Color:

Interior Trim: (- Select A Trim -)

Factory Color:

Exterior Color:

OPTIONS:

FINANCING INFORMATION:

Amount Financed: \$ 0 Financing Type: (- Select A Type -)

Term: Months Payment: \$

Replacement Date:

Rate: % Residual: %


Loan Pay-off: \$ Good Until:

- Create a Locate: If you do not have the vehicle that the customer is looking for click here to create a locate vehicle in the system.
 - Next, enter all information listed in red and any other detailed information about the vehicle you may have and click Save and Close located at the bottom of this page. *(Use the year, make and model for the vehicle for the stock number for ease of finding the vehicle at a later time.)*
- **Trade-Ins:**
 - Find Item: Click this option to search for a Trade-In you have already created.
 - Create Trade: Click this option to create a new Trade-In for your customer.
 - Enter all the information listed in red and any other detailed information about the Trade-In vehicle and click Save and Close located at the bottom of this page. *(Note: use the customers first initial of their first name and full last name plus the year and model of vehicle for ease of finding the vehicle at a later time.)*
- **Additional Customer Information** can be added by clicking on Actions in the top right hand corner of the screen and selecting Edit Client.
- **If the customer is not sold and delivered than the Client Contact Ticket is complete and you can return to your Home Page by clicking Home on the Navigate Bar. If the customer is sold and delivered see training on Start a Deal.**

4a. Contact Log:

You can view your Client Contact Tickets or to reopen an existing Client Contact Ticket from the Contact Log in the Navigate Bar. This is particularly useful if you need to enter information at a later time because you might not have had the chance to add it when the ticket was originally created. You might also need to reopen a Client Contact Ticket to Start a Deal.

- Click on **Contact Log** in the Navigate Bar.
- The Contact Log is defaulted to show you a list of your last seven days of Client Contact Tickets in chronological order with the last lead you have entered shown at the top of the page.
- **Rev:** In the first column you will see if the Client Contact Ticket has been marked as Reviewed.
- **Type:** In the second column you will see the type of lead represented by an icon:
 - The world is an internet lead
 - The client is an In-Store lead
 - The phone is Phone-Up lead
- **ID:** In the third column you will see the Contact Ticket number. The number is a link. If you click on the link it will reopen the Client Contact Ticket.
- **Date:** In the fourth column you will see the Date or Time the lead was received.
- **Customer:** In the fifth column you will see the Customers Name. This will take you to the Client Information Screen (see next training module).
- **Salesperson:** In the sixth column you will see yourself as the Salesperson associated with the lead.

Note: if you would like to see a different Date Range or a specific Type of Client Contact Tickets use the drop downs at the top of the page to select what you would like to see and click the search icon  to get your results.

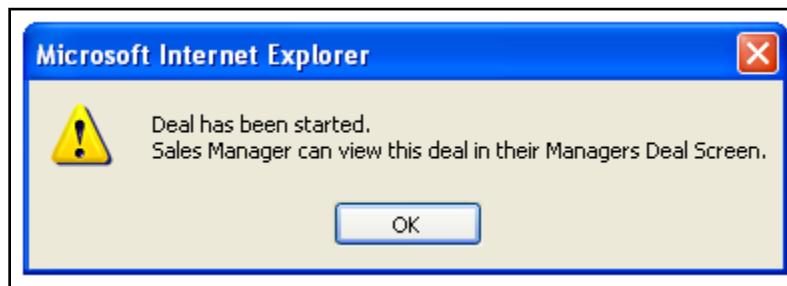
Rev.	Type	ID	Date	Customer	Salesperson
<input type="checkbox"/>		2432487	4:48 PM	Smith, Henrietta	Susie Sales
<input type="checkbox"/>		2432486	4:46 PM	Thumb, Tommy	Susie Sales
<input type="checkbox"/>		2432467	2:16 PM	Mclaren, Kathy	Susie Sales

Page 1

5a. Start A Deal:

When your customer is working a Deal you will need to start the deal in the Autoclick System. This will automatically trigger your Sold Follow-up if it has been setup for your dealership. Note: Your customer will also move from the Active Status to the Inactive Status.

- On the Contact Ticket select which vehicles you would like to start a deal for. To select the Item Interested In click the Radio button to the left of its stock number. To select the Trade-In click the Box to the left of its stock number.
- Click on **Start Deal** located at the top of the Client Contact Ticket.
- You will see a confirmation and the deal is now viewable by management



6a. Viewing your Deals

- To view deals **click Deals on the Navigate bar.**
- The Deals page displays all deals in chronological order with the most recent deal at the top of the list.
- **Deal #:** you can click on Deal # to see the details of the deal.
- **CT# :** Client Ticket to view the details of the Client Ticket.
- **Clients Name:** you can click on the clients name to view the Client Information screen.
- **Date:** this is the date and time the deal was started or finalized.
- **Salesperson:** this is the Salesperson that started the deal.
- **Status-**
 - Active: Deal has been started but not Finalized
 - Sold and Delivered: Deal is Finalized
 - Renegotiated: The Deal was Finalized and Rolled Back.


- Lost: The Deal was started but didn't get Finalized within 72 hrs.
- **Note:** You are able to reorder the page by clicking on any of the headings.

VIEW: ● MY ACTIVE ● ALL MY ● MY SILD ● ALL						
Deal #	CT #	Client	Date	Salesperson	Status	
114502	243294	Gonna whizel	10/17/2006 3:41 PM	Sales Person 2	Active	
114501	243294	Gonna whizel	10/17/2006 3:41 PM	Sales Person 2	Active	
88110	227263	Chad Johnson	5/30/2004 11:28 AM	Sales Person 2	Lost	



7a. Updating your personal information:

To update your Personal Information in the Autoclick System click on the [My Info](#) link in the navigate bar. On the next screen you see will see Personal Settings at the top left hand corner of the screen. To edit your information:

- Click on Edit next to **My Information**.
- You will see an Edit Employee pop-up box.
- Edit your information here.
- *All fields in red are required fields.*
- *Note: Make sure your Initials are in the Initials box.*
- When you are done editing your information scroll down to the bottom of the edit box and click **Save and Close**. When you use this save option it saves the information and returns you to the last page you have open. You can use this save option 100% of the time.

 **EDIT AN EMPLOYEE**



First Name: <input type="text" value="Susie"/>	Dealership: <input type="text" value="AutoClick Training Dealership"/>
Middle Name: <input type="text"/>	Manager: <input type="text" value="John Trainer"/>
Last Name: <input type="text" value="Sales"/>	Employee Type: <input type="text" value="Salesperson"/>
Initials: <input type="text" value="SS"/>	Active: <input checked="" type="checkbox"/>
Address: <input type="text"/>	Phone Number: <input type="text"/>
City: <input type="text"/>	Pager Number: <input type="text"/>
State: <input type="text"/>	Cell Number: <input type="text"/>
Zip: <input type="text"/>	Email Address2: <input type="text"/>
Email Address: <input type="text" value="sus@test.com"/>	Do you accept Internet Leads?: <input type="checkbox"/>
Password: <input type="password" value="••••"/>	Start Date: <input type="text"/>
Confirm Password: <input type="password" value="••••"/>	

EMPLOYEE OPTIONS:  

Perfered Time Format:

Time Zone:

Back-end ID:

E-MAIL OPTIONS:  

Reply To Address:

Include Original Text with reply? **Request Read Receipt?**

Check For New Messages Every **Minutes**

E-Mail Signature: *Please limit signature to 300 characters or less

B **I** **U** 