

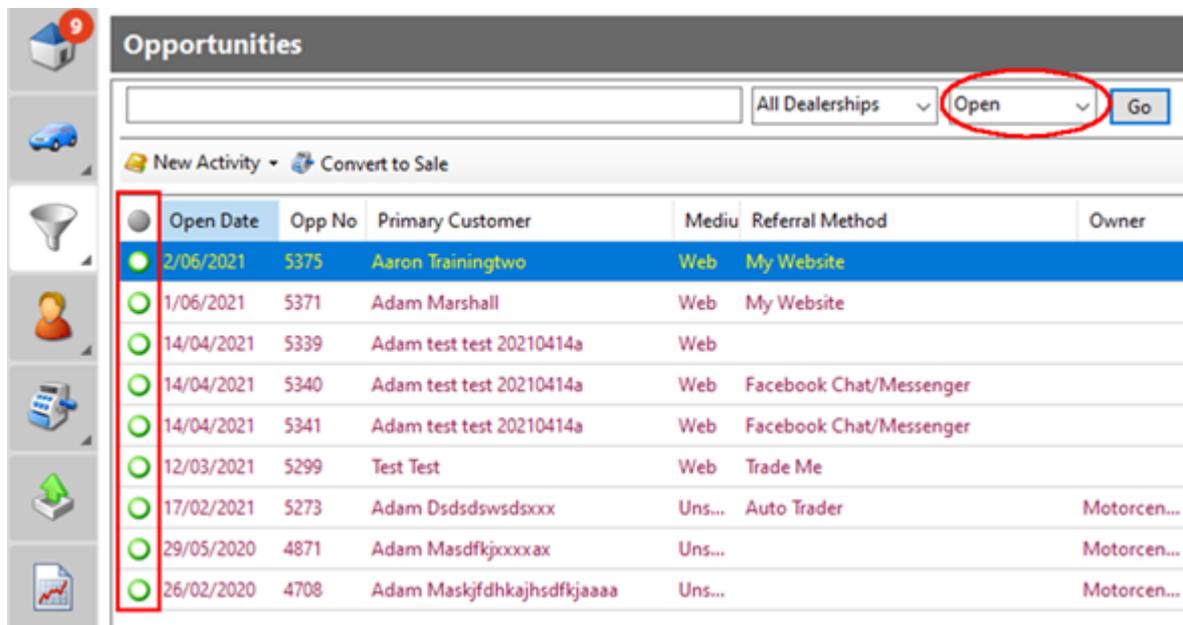
How to convert an opportunity into a sale

Opportunities are made up of activities (also known as leads) from your customers, such as Enquiries, Test Drives and Finance Applications.

Types of opportunities

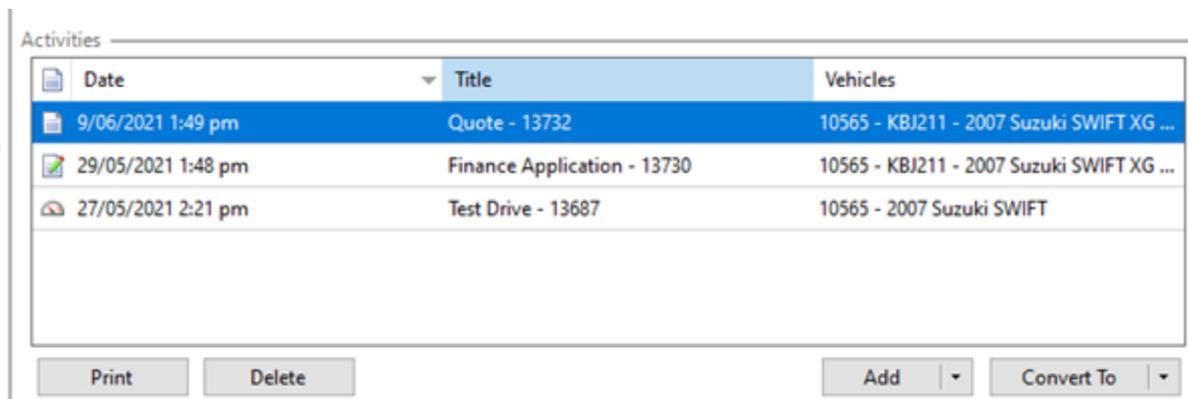
There are three types of opportunity statuses – Open, Won and Lost.

Open opportunities: These are current active leads in your system. These are identified by a white circle and green border in the left column of the opportunities screen and can be viewed by filtering by 'open' opportunities (as shown below).



Open Date	Opp No	Primary Customer	Mediu	Referral Method	Owner
2/06/2021	5375	Aaron Trainingtwo	Web	My Website	
1/06/2021	5371	Adam Marshall	Web	My Website	
14/04/2021	5339	Adam test test 20210414a	Web		
14/04/2021	5340	Adam test test 20210414a	Web	Facebook Chat/Messenger	
14/04/2021	5341	Adam test test 20210414a	Web	Facebook Chat/Messenger	
12/03/2021	5299	Test Test	Web	Trade Me	
17/02/2021	5273	Adam Dsdswsdsxxx	Uns...	Auto Trader	Motorcen...
29/05/2020	4871	Adam Masdfkjxxxxax	Uns...		Motorcen...
26/02/2020	4708	Adam Maskjfdhkajhsdfkjaaaa	Uns...		Motorcen...

As a customer adds more activities (such as a test drive, submit a finance application or get a quote to price their trade) these will add on to their current open opportunity:



Date	Title	Vehicles
9/06/2021 1:49 pm	Quote - 13732	10565 - KBJ211 - 2007 Suzuki SWIFT XG ...
29/05/2021 1:48 pm	Finance Application - 13730	10565 - KBJ211 - 2007 Suzuki SWIFT XG ...
27/05/2021 2:21 pm	Test Drive - 13687	10565 - 2007 Suzuki SWIFT

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Won opportunities: These are typically opportunities that have been won and successfully converted in to a sale. These are identified by a green circle in the left column of the opportunities screen and can be viewed by filtering by 'won' opportunities (as shown below).

The screenshot shows the 'Opportunities' interface with the filter dropdown set to 'Won'. The table below lists the filtered opportunities:

Open Date	Opp No	Primary Customer	Medi	Referral Method	Owner	Next Action	Next Action	Upp Price	Es Vi	Probability	Last Activity
11/02/2021	5269	Adam Marshallkasjdfkskskeww	Uns...		Motorc...		11/02...	2...	1...	★★★★☆	Sale - 1343
11/02/2021	5270	Adam Mashshajsjewqxs	Uns...		Motorc...		11/02...	1...	1...	★★★★☆	Sale - 1347
11/02/2021	5266	Adam Jenkinsabcd	Uns...		Motorc...		11/02...	5...	1...	★★★★☆	Sale - 1338
11/02/2021	5267	Adam Mashshajsjewqxs	Uns...		Motorc...		11/02...	1...	1...	★★★★☆	Sale - 1341
9/02/2021	5264	Lozza Test	Uns...		Motorc...		9/02/...	1...	1...	★★★★☆	Sale - 1335
9/02/2021	5262	Autotrader Caller test	Web	My Website (Test)			9/02/...	0...	1...	★★★★☆	Sale - 1417
4/02/2021	5259	Lauren Motorcentral	Uns...		Motorc...		4/02/...	5...	1...	★★★★☆	Sale - 1331

Lost opportunities: These are opportunities that have expired. These are identified by a red circle in the left column of the opportunities screen and can be viewed by filtering by 'lost' opportunities (as shown below).

The screenshot shows the 'Opportunities' interface with the filter dropdown set to 'Lost'. The table below lists the filtered opportunities:

Open Date	Opp No	Primary Customer	Medi	Referral Method	Owner	Next Action	Next Action	Upp Price	Es Vi	Probability	Last Activity
22/02/2021	5281	test 123	Web	My Website	Aaron ...		22/02...	5...	1...	★★★★☆	Finance
19/02/2021	5280	Mark Ballantyne	Uns...		Mark B...		19/02...	2...	1...	★★★★☆	Finance
18/02/2021	5279	Moumvtwo Newstat	Uns...	My Website	Financ...		18/02...	6...	1...	★★★★☆	Finance
18/02/2021	5276	Asdf Asdf	Uns...	My Website	Financ...		18/02...	1...	1...	★★★★☆	Finance
18/02/2021	5277	Sadsad Fdfsff	Uns...	My Website	Financ...		18/02...	8...	1...	★★★★☆	Finance
18/02/2021	5278	Moumvc Newstatone	Uns...	My Website	Financ...		18/02...	1...	1...	★★★★☆	Finance

An opportunity is expired if they have been open for more than a certain time period, or have manually been set to 'Lost' by the salesperson after a customer has communicated that they are no longer proceeding to purchase.

There are two ways to convert an opportunity to a sale agreement:

1. Converting an Open opportunity in to a sale agreement
2. Adding an existing customer to a new sale agreement

Converting an Open opportunity in to a sale agreement

Step 1: Open opportunities > Search for customer



Opportunities

All Dealerships Open Go Clear

Using the search box, you can type the following search terms to filter the opportunities:

- Customer Name
- Customer Email Address
- Customer Mobile/Phone
- Vehicle Stock Number
- Vehicle Make
- Vehicle Model

You can also use the **Dealership** and **Status** filters to refine your search:

Opportunities

All Dealerships Open Go Clear

Step 2: Click on customer > Open opportunity

Opportunities

greg@xyz.co.nz Auckland Open Go Clear View Search Results

New Activity Convert to Sale

Open Date	Opp No	Primary Customer	Medium	Referral Method	Owner	Next	Next	Upper	Er	Probability	Last Activity	Last	Last	D	R
2/03/2021	5288	Greg Bardsley	Web	My Website	Finance...	2/03/...	5...	★★★★★	Finance Applicab...	4/0...	104...				

Opportunity - 5288

File Documents

General Custom

Basic Details

Opportunity No: 5288

Open Date: 2/03/2021

Description:

Dealership: Auckland

Owner: Finance Central

First Contact

Medium: Web

Referral Method: My Website

Opportunity Management

Next Action:

Next Action Date: 2/03/2021

Primary Customer

Name: Greg Bardsley

Home Phone:

Work Phone:

Mobile Phone: 0279363595

Email: greg@hvt.co.nz

Status Details

Status: Open

Est Value: \$5,000

Probability: 3 Stars

Status: Open

Progress: New

Comments:

Estimated Value: 5000

Probability: 3 Stars

Quick Response

Subject:

Body:

Internal Note Customer Email

Add Note

Activities

Date	Title	Vehicles
4/06/2021 10:13 am	Finance Application - 13715	10412 - 2010 Mazda Axela 1.5
27/05/2021 10:40 am	Test Drive - 13686	10426 - 2015 Senator 635
25/05/2021 11:15 am	Finance Application - 13679	10412 - 2010 Mazda Axela 1.5
2/03/2021 11:38 am	Finance Application - 13447	

Print Delete Add Convert To

Save Save & Close Cancel

Step 3: Select the activity that you would like to convert in to a sale agreement > Select 'Convert To' button > 'Sale Agreement'

Activities

Date	Title	Vehicles
4/06/2021 10:13 am	Finance Application - 13715	10412 - 2010 Mazda Axela 1.5
27/05/2021 10:40 am	Test Drive - 13686	10426 - 2015 Senator 635
25/05/2021 11:15 am	Finance Application - 13679	10412 - 2010 Mazda Axela 1.5
2/03/2021 11:38 am	Finance Application - 13447	

Print Delete Add

Save Save & Close

- Enquiry...
- Test Drive...
- Trade Appraisal...
- Feedback...
- Finance Calculator...
- Quote...
- Finance Application...
- Sale Agreement...**
- Follow-Up...

This action will create a new sale agreement and the customer's details will automatically populate in the General tab:

If you need to edit or add any of the customer's contact details, you can do this here by double clicking on the customer and making any required changes.

The vehicle will also be populated in the Vehicles tab:

Stock No	Vehicle	Sale Price
<input type="checkbox"/> 10426	Senator 635 Excess	NZD 0.00 incl
	Vehicle Registration: No Vehicle Registration selected	NZD 0.00 incl
	Vehicle Insurance: No Vehicle Insurance selected	NZD 0.00 incl
	MBI/Warranty: No MBI/Warranty selected	NZD 0.00 incl
	Service Plan: No Service Plan selected	NZD 0.00 incl

Adding an existing customer to a new sale agreement

You can also sell a vehicle directly from a vehicle on your stock list.

Step 1: Click on vehicles > Search for the vehicle



Vehicles

10426 Stock No Auckland All Statuses **Go**

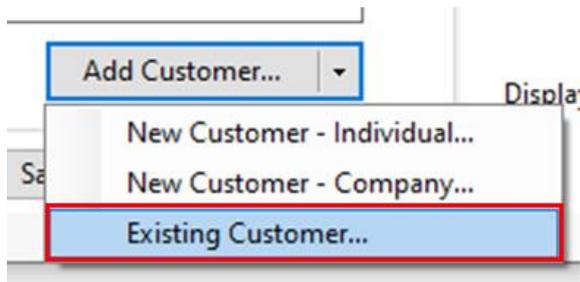
New Sell Vehicle CIN Summary Sheet More Reports New Activity

Step 2: Click on the vehicle > Select 'Sell Vehicle'

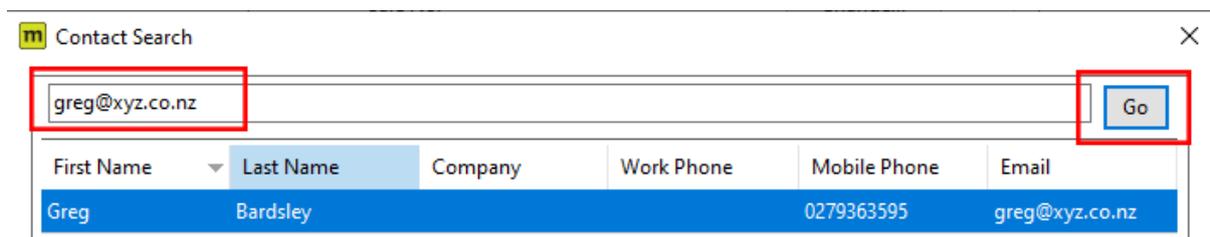
This action will create a new sale agreement.

Stock	Year	Make/Model	Style	Colour	VIN/
10426	2015	Senator 635 Excess	RE	Black	

Step 3: Navigate to bottom right corner, click 'Add Customer' > 'Existing customer'

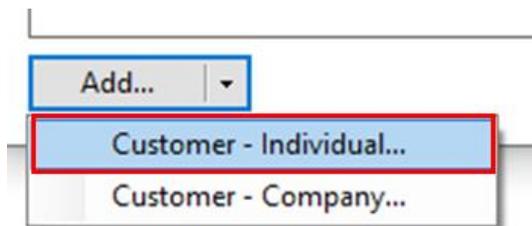


Step 4: Search for customer > Go



Note: We recommend searching for either the customer's email address or mobile number as it's more efficient. If your search for both the email address and mobile number returns no results, then try the customer's name.

If you are still unable to find them in the system then you can use the 'Add' button in the bottom left corner:



Step 5: Highlight the customer > click OK to add them to the sale agreement.

Note: It's very important to get in to the habit of converting opportunities or searching for/adding existing customers when creating sale agreements. Following this process will ensure that new customers are only added to the system when necessary, rather than having duplicate contacts with duplicate details. in the system.

Duplicate contacts details can cause major miscommunication issues with email and SMS marketing.