

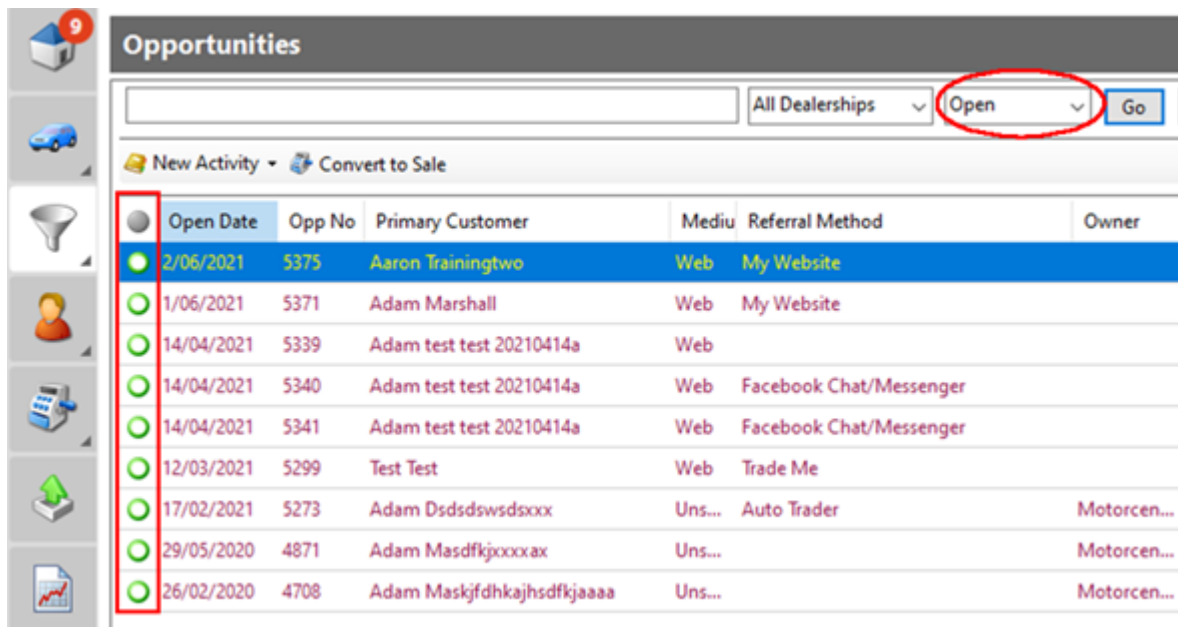
How to convert an opportunity into a sale

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

Types of opportunities

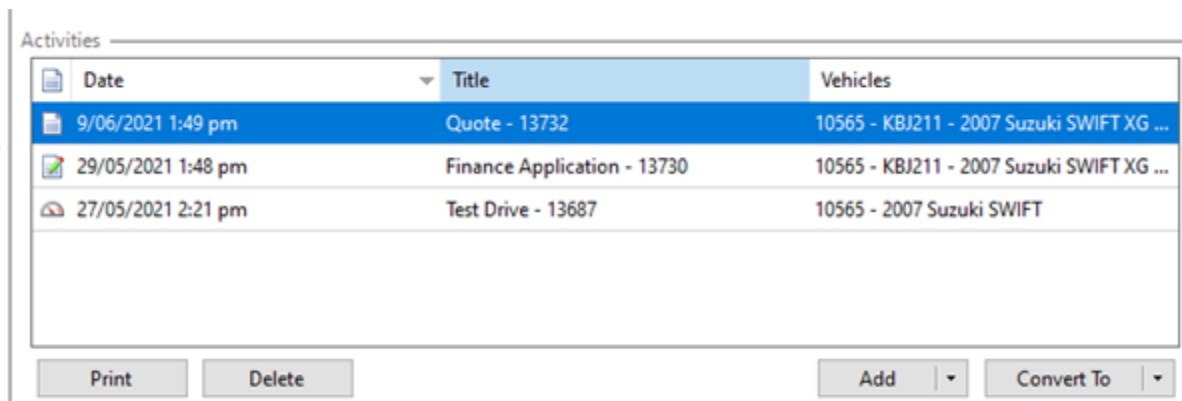
There are three types of opportunity statuses – Open, Won and Lost.

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 |

Print Delete Add Convert To

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' screen with the filter dropdown set to 'Won'. The table below lists the 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... | | ★★★★☆ | Sale - 1343 |
| 11/02/2021 | 5270 | Adam Mashshajsjewqxs | Uns... | | Motorc... | | 11/02... | 1... | | ★★★★☆ | Sale - 1347 |
| 11/02/2021 | 5266 | Adam Jenkinsabcd | Uns... | | Motorc... | | 11/02... | 5... | | ★★★★☆ | Sale - 1338 |
| 11/02/2021 | 5267 | Adam Mashshajsjewqxs | Uns... | | Motorc... | | 11/02... | 1... | | ★★★★☆ | Sale - 1341 |
| 9/02/2021 | 5264 | Lozza Test | Uns... | | Motorc... | | 9/02/... | 1... | | ★★★★☆ | Sale - 1335 |
| 9/02/2021 | 5262 | Autotrader Caller test | Web | My Website (Test) | | | 9/02/... | 0... | | ★★★★☆ | Sale - 1417 |
| 4/02/2021 | 5259 | Lauren Motorcentral | Uns... | | Motorc... | | 4/02/... | 5... | | ★★★★☆ | 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' screen with the filter dropdown set to 'Lost'. The table below lists the 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... | | ★★★★☆ | Finance |
| 19/02/2021 | 5280 | Mark Ballantyne | Uns... | | Mark B... | | 19/02... | 2... | | ★★★★☆ | Finance |
| 18/02/2021 | 5279 | Moumvtwo Newstat | Uns... | My Website | Financ... | | 18/02... | 6... | | ★★★★☆ | Finance |
| 18/02/2021 | 5276 | Asdf Asdf | Uns... | My Website | Financ... | | 18/02... | 1... | | ★★★★☆ | Finance |
| 18/02/2021 | 5277 | Sadsad Fdfsff | Uns... | My Website | Financ... | | 18/02... | 8... | | ★★★★☆ | Finance |
| 18/02/2021 | 5278 | Moumvc Newstatone | Uns... | My Website | Financ... | | 18/02... | 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**

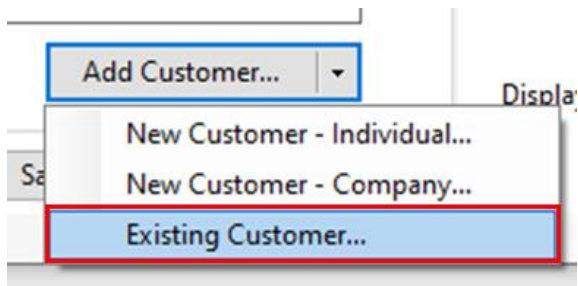
New Sell Vehicle CIN Summary Sheet More Reports New Activity

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

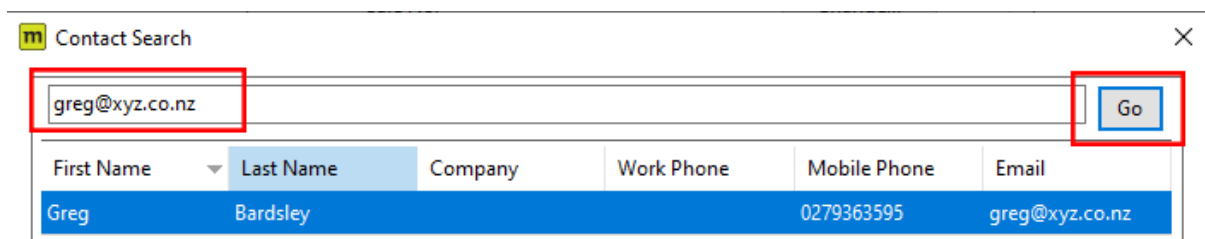
This action will create a new sale agreement.

| 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'

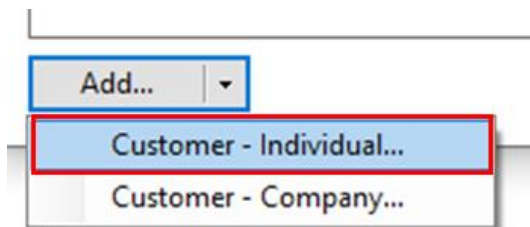


Step 4: Search for customer > Go



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.