



## **EasyQuote-DCS**

# **Sale Executive Instruction Manual**

### **Welcome EasyQuote Data Capturing System**

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

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

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

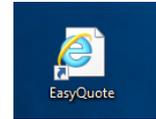
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# EasyQuote-DCS Site

## Starting EasyQuote-DCS

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



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

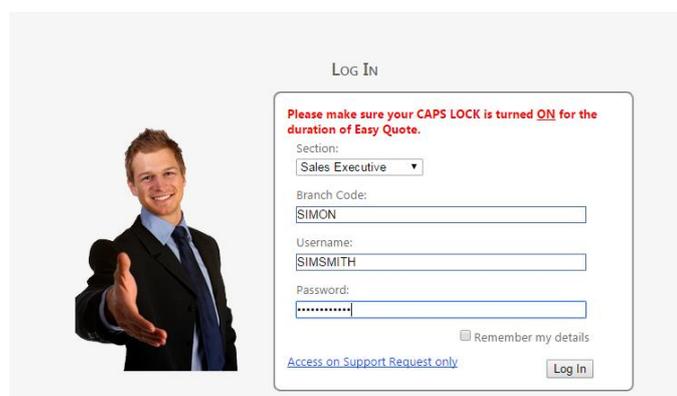


- The EasyQuote-DCS Logon page should appear.



## Logging In

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



## Reminders Page

- Your reminders will be the first to appear after logging in. The system will generate these reminders for you based on quotes you have done, quotes that are left open, call back reminders on sold vehicles as well as birthday reminders.
- Reminders in **RED** are overdue. Reminders in **GREEN** are due today. Reminders in **BLACK** are due within the next seven days.

**REMINDERS**

View reminders  days prior to due date.  

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

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

Overdue Courtesy reminder automatically completed by the system		
Added : 26/02/2016 10:23:00	Call Back - 03/05/2016	<input checked="" type="checkbox"/>
6 Months courtesy Call Back		12/05/2016 11:56:43
Added : 09/05/2016 11:04:00	Call Back - 09/05/2016	<input type="checkbox"/>
test		

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

Home Page   Open Quotes   Reminders

**REMINDERS**

View reminders  days prior to due date.  

Quote #	Client Name	
848	MICHAEL FRANKSON	Call Bac
827	SARAH MYBURGH	Call Bac
821	MAUREEN SMITH	Quote C
822	BOB MATHS	Quote C

# Home Page

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

**HOME PAGE**

CLIENT SEARCH  
Choose ONE field to search (eg. Last Name) then click the "SEARCH" button.

First Name :  
 x

Last Name :

Company Name :

Contact Number :

# Selecting previously captured client details

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

CLIENT SEARCH

[ADD NEW CLIENT](#)

**CLIENT SEARCH RESULT**

Client Type	Company	First Name	Last Name	Also Known As	Contact Numbers	Sales Exec.
Private		MAX	SMITH		(C) 0824571461	Richelle

## Capturing a New Client

- If the client you searched for did not exist then click on [ADD NEW CLIENT](#)
- A screen to Add New Client Details will open. Use the drop down to select the correct title for the client and then capture as much of the clients details as you can. The lines in pink are the fields that are required and compulsory in order for you to proceed. **(Please do not leave any spaces between numbers when adding contact numbers)**
- Once you have captured the details click on the **SAVE** button at the bottom of the screen.

ADD NEW CLIENT DETAILS

Please note: Fields marked in red are required.

Please Select Client Type :  PRIVATE  FLEET CLIENT

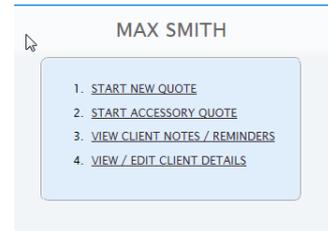
Title :	<input type="text" value="MR."/>
First Name :	<input type="text" value="MAX"/>
Last Name :	<input type="text" value="SMITH"/>
Also Known As First Name :	<input type="text"/>
Cellphone Number :	<input type="text"/> (one of these are required)
Home Number :	<input type="text"/> (one of these are required)
Work Number :	<input type="text"/> (one of these are required)

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

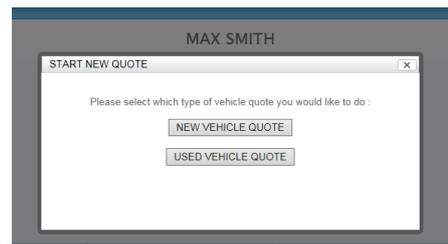
1. [START NEW QUOTE](#)
2. [START ACCESSORY QUOTE](#)
3. [VIEW CLIENT NOTES / REMINDERS](#)
4. [VIEW / EDIT CLIENT DETAILS](#)

# Starting a new Quote

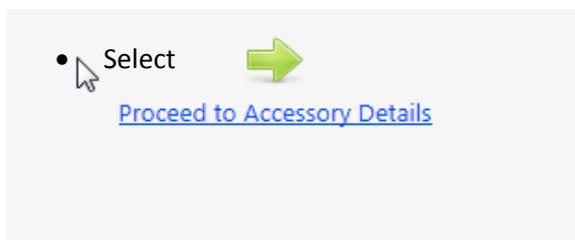
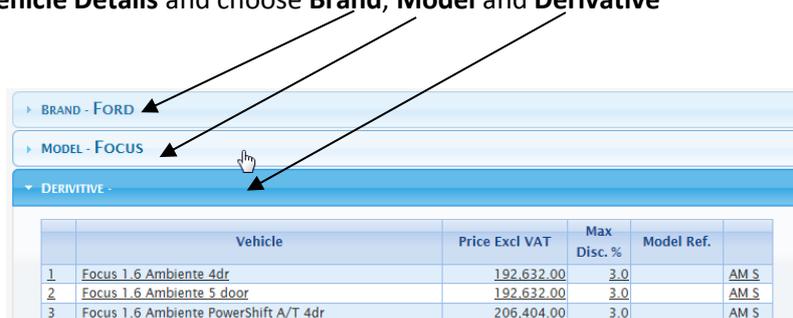
- Begin by selecting option 1. **Start New Quote** under the client's name.



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



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



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

**ACCESSORIES**

[Select from Accessory List](#)

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

		Accessory	Rec. Retail Price Excl. VAT	Rec. Retail Price Incl. VAT	Min. Sales Price Excl. VAT	Optional Extras	
1	<input checked="" type="checkbox"/>	BLUETOOTH	1500.00	1710.00	1500.00	<input type="checkbox"/>	
2	<input type="checkbox"/>	METALIC PAINT	2500.00	2850.00	2500.00	<input type="checkbox"/>	
3	<input checked="" type="checkbox"/>	DELIVERY FEE	3500.00	3990.00	3500.00	<input checked="" type="checkbox"/>	
4	<input checked="" type="checkbox"/>	3 IN 1 PROTECTION	2500.00	2850.00	2500.00	<input checked="" type="checkbox"/>	
5	<input type="checkbox"/>		N/C	N/C	N/C/STD	<input type="checkbox"/>	ADD



[Proceed to Financial Details](#)

- Select  [Proceed to Financial Details](#)

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

Vehicle Details   Accessories   **Trade-in / Financial Details**   Finalise

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**TRADE-IN DETAILS**

[ADD TRADE-IN](#) 

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**FINANCIAL DETAILS**

<p>Max Discount : 3.7 %</p> <p>Max Fleet Cash : 5,350.88</p> <p>Discount Offered : <input type="text" value="0"/> &lt;-- Excl. VAT --&gt; <input type="text" value="0"/> %</p> <p>Total Trade In Offered : 0.00</p> <p>Settlement : 0.00</p> <p>Over Allowance : 0.00</p> <p>Deposit (Cash Element) : <input type="text" value="0"/></p> <p>Cheque Refund / Cash Back : <input type="text" value="0"/></p> <p>Down Payment : 0.00</p> <p><a href="#">Select Factory Assistance</a></p> <p>- Factory Assistance (Deposit) : R 0</p> <p>- Factory Assistance (Paid Out) : R 0</p> <p>- Factory Assistance (Discount) : R 0</p> <p>License and registration : <input type="text" value="0"/></p> <p>Temporary number plates : <input type="text" value="0"/></p> <p>Personal number plates : <input type="text" value="0"/></p>	<p><b>Ford Kuga 1.6 EcoBoost Titanium Auto AWD</b></p> <table border="0"> <tr><td>Retail Price</td><td style="text-align: right;">133,771.93</td></tr> <tr><td>Discount</td><td style="text-align: right;">(0.00)</td></tr> <tr><td><b>Total</b></td><td style="text-align: right;"><b>133,771.93</b></td></tr> <tr><td>Accessories Total</td><td style="text-align: right;">5,000.00</td></tr> <tr><td><b>Total</b></td><td style="text-align: right;"><b>138,771.93</b></td></tr> <tr><td>VAT @ 14 %</td><td style="text-align: right;">19,428.07</td></tr> <tr><td>License and registration</td><td style="text-align: right;">0.00</td></tr> <tr><td>Temporary number plates</td><td style="text-align: right;">0.00</td></tr> <tr><td>Personal number plates</td><td style="text-align: right;">0.00</td></tr> <tr><td><b>Total purchase price</b></td><td style="text-align: right;"><b>158,200.00</b></td></tr> </table>	Retail Price	133,771.93	Discount	(0.00)	<b>Total</b>	<b>133,771.93</b>	Accessories Total	5,000.00	<b>Total</b>	<b>138,771.93</b>	VAT @ 14 %	19,428.07	License and registration	0.00	Temporary number plates	0.00	Personal number plates	0.00	<b>Total purchase price</b>	<b>158,200.00</b>	<p><b>Trade-in:</b></p> <table border="0"> <tr><td>Trade-in valuation</td><td style="text-align: right;">0.00</td></tr> <tr><td>Settlement to credit provider</td><td style="text-align: right;">(0.00)</td></tr> <tr><td><b>Trade-in equity</b></td><td style="text-align: right;"><b>0.00</b></td></tr> </table> <p><b>Summary</b></p> <table border="0"> <tr><td>Total purchase price</td><td style="text-align: right;">158,200.00</td></tr> <tr><td>Less : trade-in equity</td><td style="text-align: right;">(0.00)</td></tr> <tr><td>Less : deposit - Cash down-payment</td><td style="text-align: right;">(0.00)</td></tr> <tr><td>    - Cash back utilised</td><td style="text-align: right;">(0.00)</td></tr> <tr><td>Cheque refund to purchaser</td><td style="text-align: right;">0.00</td></tr> <tr><td><b>Principal debt</b></td><td style="text-align: right;"><b>158,200.00</b></td></tr> <tr><td>Cash back available to purchaser</td><td style="text-align: right;">0.00</td></tr> </table>	Trade-in valuation	0.00	Settlement to credit provider	(0.00)	<b>Trade-in equity</b>	<b>0.00</b>	Total purchase price	158,200.00	Less : trade-in equity	(0.00)	Less : deposit - Cash down-payment	(0.00)	- Cash back utilised	(0.00)	Cheque refund to purchaser	0.00	<b>Principal debt</b>	<b>158,200.00</b>	Cash back available to purchaser	0.00
Retail Price	133,771.93																																									
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 [Proceed to Finalise Quote](#)

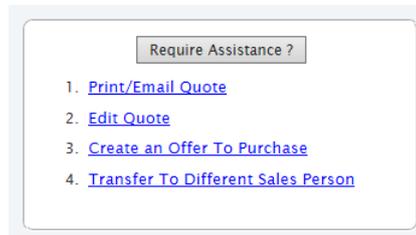
- Select  [Proceed to Finalise Quote](#)

- Select Quote Method and click on  [FINALISE](#)

## Print and Email Quotes

You can now open the quote for printing and emailing.

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

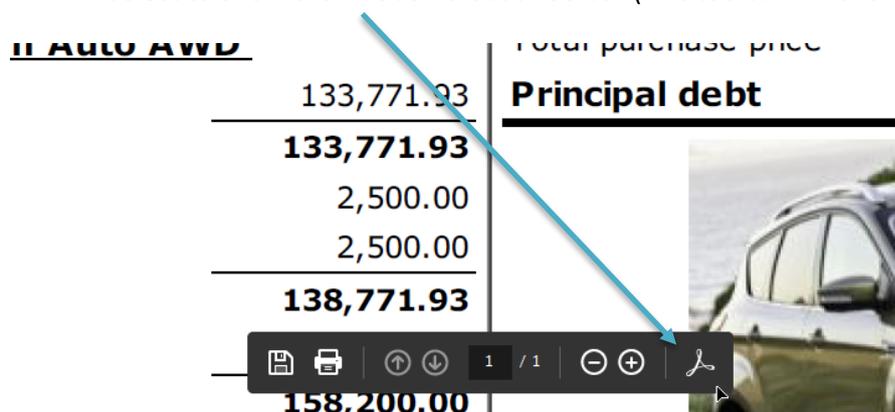


- Select **Print / Email Quote** to open the quote. If you find the below Tab on the bottom of the screen.

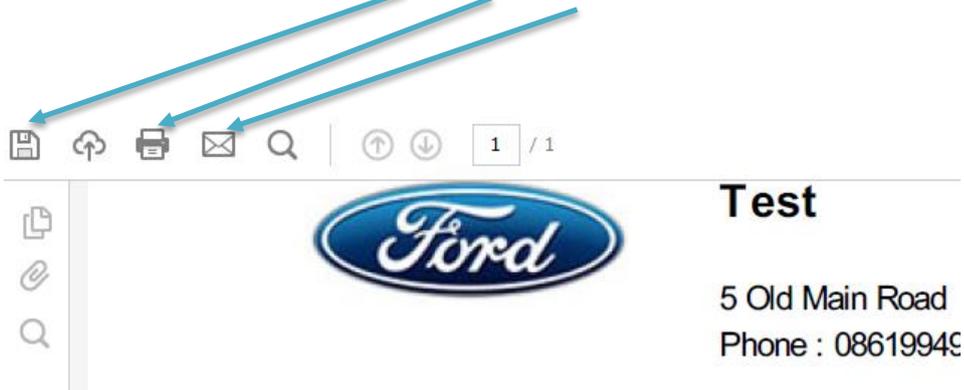


- Select to **Show the Adobe Acrobat Toolbar** (This toolbar will show the email icon)

<u>II AUTO AWD</u>	Total purchase price
133,771.93	<b>Principal debt</b>
<b>133,771.93</b>	
2,500.00	
2,500.00	
<b>138,771.93</b>	
<b>158,200.00</b>	



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



## Create Offer to Purchase

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

### Client Details

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

CLIENT DETAILS

PRIVATE  COMPANY

Please note: Fields marked in red are required.

**MR**

Title :	MR
First Name :	MICHAEL
Last Name :	MOORE
Also Known As First Name :	
Cellphone Number :	0793406702 (one of these are required)
Home Number :	(one of these are required)
Work Number :	(one of these are required)
Fax Number :	
International Number :	
Email Address :	MICHAEL.MOORE@GMAIL.COM
Designation :	---
Company :	
Company Reg. Number :	
Vat Number :	
ID Number :	8484020253080
Passport Number :	
Fleet Number :	
Street 1 :	
Street 2 :	
Street 3 :	
Suburb :	<a href="#">FIND POSTAL CODE</a>
City :	KZN
Postal Code :	
P.O. Box 1 :	<a href="#">Copy Physical Address</a>
P.O. Box 2 :	
P.O. Box 3 :	
P.O. Box Suburb :	<a href="#">FIND POSTAL CODE</a>
P.O. Box City :	
P.O. Box Postal Code :	

[Proceed to Bank Details](#)

- Select 

[Proceed to Bank Details](#)

## Bank Details

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

**BANK DETAILS**

If you do not have the bank information, you may leave this section empty and either fill in the banking details manually on the OTP once you have the information, or edit and update the OTP at a later stage and reprint it.

INVOICE TO :

BANK    COMPANY    INDIVIDUAL

**PLEASE SELECT FINANCIAL INSTITUTE**

789456556 - FNB  
6539829040665 - GOLIATH NATIONAL BANK  
4591292Y62395 - MFC  
789456789456 - NEDBANK  
8979879879879 - TEST  
22222222 - TEST2  
1234567890123 - WESBANK

Bank Name :	<input type="text"/>
Full Address :	<input type="text"/>
	<input type="text"/>
	<input type="text"/>
Suburb :	<input type="text"/>
City :	<input type="text"/>
Postal Code :	<input type="text"/>
VAT No. :	<input type="text"/>

**BANK DETAILS**

If you do not have the bank information, you may leave this section empty and either fill in the banking details manually on the OTP once you have the information, or edit and update the OTP at a later stage and reprint it.

INVOICE TO :

BANK    COMPANY    INDIVIDUAL

789456556 - FNB

DEFAULT

OR

Bank Name :	FNB
Full Address :	5 STREET ADDRESS
	STREET 2
	STREET 3
Suburb :	SUBURB
City :	DURBAN
Postal Code :	4001
VAT No. :	4351234567



[Proceed to Vehicle Details](#)

- Select

[Proceed to Vehicle Details](#)

## Vehicle details

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

**DETAILS OF NEW VEHICLE**

Make / Model :	Mazda Mazda 3 1.6i Active 4dr <a href="#">What vehicles are available ?</a>
Year of 1st Registration :	2016
Serial / VIN No. :	<input type="text"/>
Engine No. :	<input type="text"/>
Stock No. :	<input type="text"/>
Colour :	<input type="text"/>
Trim Colour :	<input type="text"/>
Reg. No. :	<input type="text"/>
Mileage. :	<input type="text"/>
ETA Date :	<input type="text"/>
MM Code :	<input type="text"/>

Print ETA

- Select



[Proceed to Spotters Details](#)

## Spotter's Details

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

**EASYQUOTE-DCS - EASYQUOTE TEST** Welco

Home Page   Open Quotes   Reminders

**OFFER TO PURCHASE**

Client Details   Bank Details   Vehicle Details   **Spotters Details**   Quote Financials   Cash Accessories   Quantity

**SPOTTERS DETAILS**

Name :	<input type="text"/>	Invoice No. :	<input type="text"/>
Cheque No. :	<input type="text"/>	Sundry Inv. No. :	<input type="text"/>
Amount :	<input type="text"/>	Credit Note No. :	<input type="text"/>
Finance Company :	<input type="text"/>		
Contact Name :	<input type="text"/>	INSURANCE DETAILS :	
Contact Number :	<input type="text"/>	Date :	<input type="text"/>
		Insurance Company :	<input type="text"/>
		Policy No. :	<input type="text"/>
		Expiry Date :	<input type="text"/>

[Proceed to Quote Financials](#)

- Select



[Proceed to Financial Details](#)

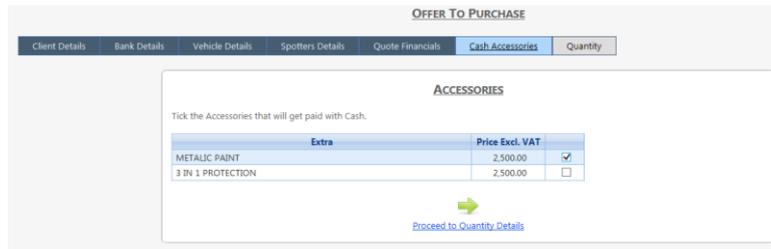
## Quote Financials

- Here you have the option to edit these amounts.

- Select 

[Proceed to Cash Accessories](#)

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



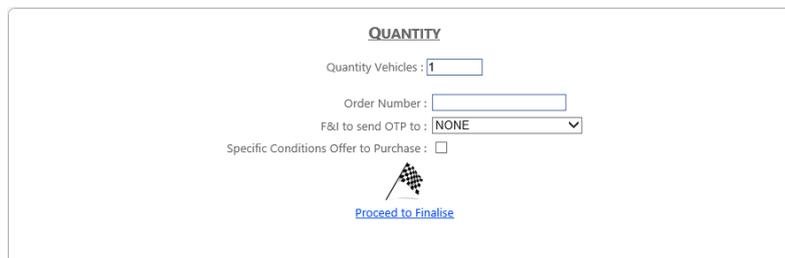
Extra	Price Excl. VAT	
METALLIC PAINT	2,500.00	<input checked="" type="checkbox"/>
3 IN 1 PROTECTION	2,500.00	<input type="checkbox"/>

- Select 

[Proceed to Quantity Details](#)

## Quantity

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



**QUANTITY**

Quantity Vehicles :

Order Number :

F&I to send OTP to :

Specific Conditions Offer to Purchase :

  
[Proceed to Finalise](#)

- Select 

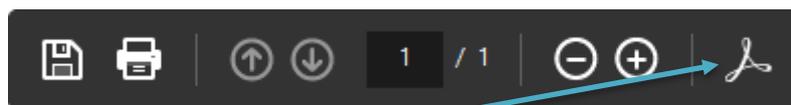
[Proceed to Finalise](#)

## Print and email Offer to Purchase

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



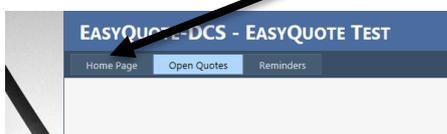
- Remember - If you find the below Tab on the bottom of the screen.



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

## View list of completed quotes for follow up Purposes.

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

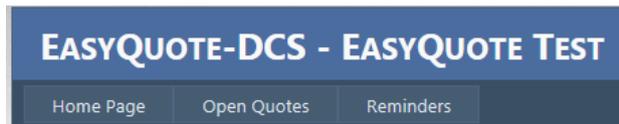


- At the bottom of your Home Page, you will see a table which is a summary of your profile.

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

## Make Call Back Reminders and Notes

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



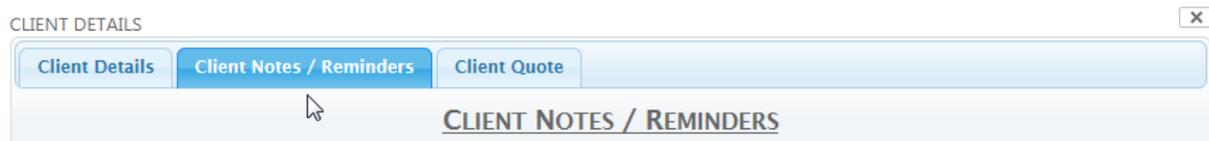
- You can then select the quote you which to add a **Note/Call back or Reminder** to

OPEN QUOTES

Both   
  New   
  Used

Quote ID	Quote Date	Client Name	Company Name	Vehicle	Status
895	09/05/2016	MICHAEL MOORE		Kuga 1.6 EcoBoost Titanium Auto AWD	QTP
852	14/03/2016	MILLY RAMSEY		Prospecting	Verbal
847	14/03/2016	ROBYN SMYTHE		Tourneo 2.2TDCI Trend SWB FWD MT Bus	QTP
829	10/03/2016	CLINT BOB		Ecosport 1.0 GTDi Trend Man	QTP
851	07/03/2016	THOMAS MOORE		Ford Figo 1.4 Trend	QTP
850	07/03/2016	CARMEN SCOLTZ		MX-5 2.0 6MT Roadster Coupe	QTP
827	01/03/2016	SARAH MYBURGH		2.0L Individual 2WD 6AT	QTP
833	20/03/2016	BOB MATHE	BOB	Accessory Quote Only	Quote

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



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

CLIENT DETAILS X

Client Details    Client Notes / Reminders    Client Quote

CLIENT NOTES / REMINDERS

**ROBYN SMYTHE**

Cell Number : 0793406702  
 Home Number :  
 Work Number :  
 Email Address : [ROBYN@GMAIL.COM](mailto:ROBYN@GMAIL.COM)

Note Type :       Due Date :

Please select "Note Type" before entering comments.

---

Show Archived Notes

Show Notes for Quote only  | Show All Notes For Client

## Closing Open Quotes

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

	Unallocated Leads	Open Leads	No. Red Open Quotes	No. Open Quotes	Pros Without Reminders	No. Of Overdue Reminders
New	<a href="#">0</a>	<a href="#">1</a>	<a href="#">4</a>	<a href="#">6</a>	<a href="#">1</a>	<a href="#">20</a>
Used	<a href="#">0</a>	<a href="#">2</a>	<a href="#">2</a>	<a href="#">3</a>	<a href="#">1</a>	<a href="#">20</a>

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

**Quote Closure Options**

Delivered     
  Competitors     
  Financial     
  No Stock

Other Dealership     
  Postponed Sale     
  Comparative Quote     
  Other

the quote.

## System Reminders

- The system is designed to bring items of importance to you attention.
- When you log in, the system will check to see if you have any outstanding reminders that need you attention, and you will arrive at the reminders page.
- You can also access these **Reminders** on your **Home Page** in the table that summarises your profile when you select **No. of Overdue Reminders**

HOME PAGE

[CLIENT SEARCH](#)  
 Choose ONE field to search (eg. Last Name) then click the "SEARCH" button.

First Name :

Last Name :

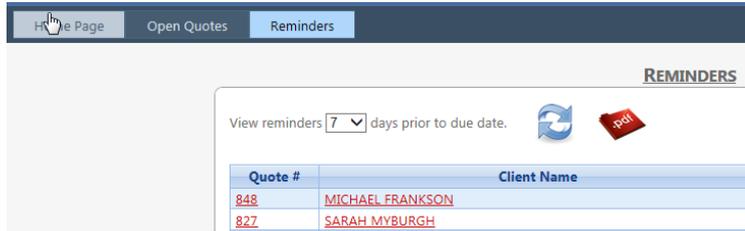
Company Name :

Contact Number :

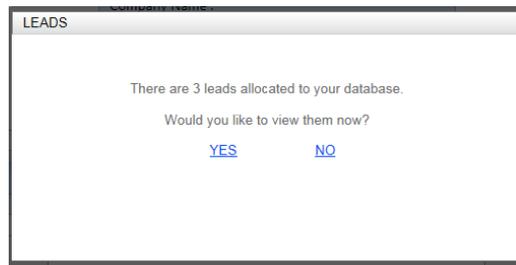
	Unallocated Leads	Open Leads	No. Red Open Quotes	No. Open Quotes	Pros Without Reminders	No. Of Overdue Reminders
New	<a href="#">0</a>	<a href="#">1</a>	<a href="#">4</a>	<a href="#">6</a>	<a href="#">1</a>	<a href="#">20</a>
Used	<a href="#">0</a>	<a href="#">2</a>	<a href="#">2</a>	<a href="#">3</a>	<a href="#">1</a>	<a href="#">20</a>

# Accepting Leads

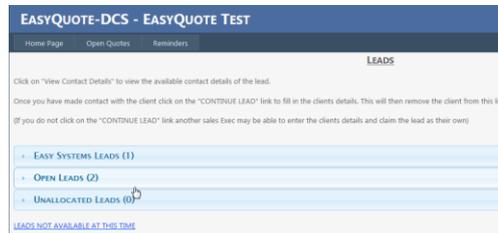
- After logging on and completing any **Reminders** due, **select Home Page**.



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

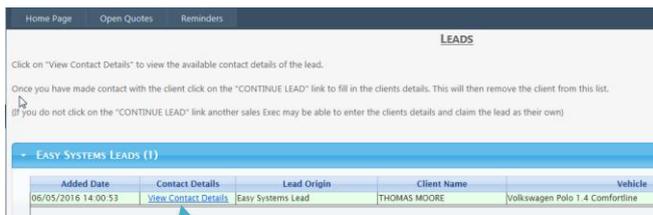


- If you are busy with another task and would like to attend to the lead at another stage then select **NO**. If you would like to view the leads, click **YES** and you will be taken to your options below.



## Types of Leads

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



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

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

**LEADS**

Click on "View Contact Details" to view the available contact details of the lead.  
 Once you have made contact with the client click on the "CONTINUE LEAD" link to fill in the clients details. This will then remove the client from this list.  
 (If you do not click on the "CONTINUE LEAD" link another Sales Exec may be able to enter the clients details and claim the lead as their own)

▶ **EASY SYSTEMS LEADS (1)**

▼ **OPEN LEADS (2)**

Added Date	Contact Details	Lead Origin	Client Name
19/06/2015 09:48:17 fdgdf gdfgd	<a href="#">View Contact Details</a>	Hub Lead Test	Hub Test Lead
11/08/2015 15:07:30 dfefrgergerg	<a href="#">View Contact Details</a>	EasyQuote	Linton

▶ **UNALLOCATED LEADS (0)**

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

▼ **UNALLOCATED LEADS (1)**

Added Date	Contact Details	Lead Origin	Client Name	Vel
11/05/2016 09:12:22	<a href="#">View Contact Details</a>	Gumtree.co.za		

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

**LEAD CONTACTED** [X]

Contact Number	0824571461
Lead Origin	Gumtree.co.za
Vehicle Range	130 000-1010 000K
Tradeln	NO T/I
Comment	

[CONTINUE LEAD](#)  
[NO LEAD](#)  
[NOT A NEW VEHICLE](#)