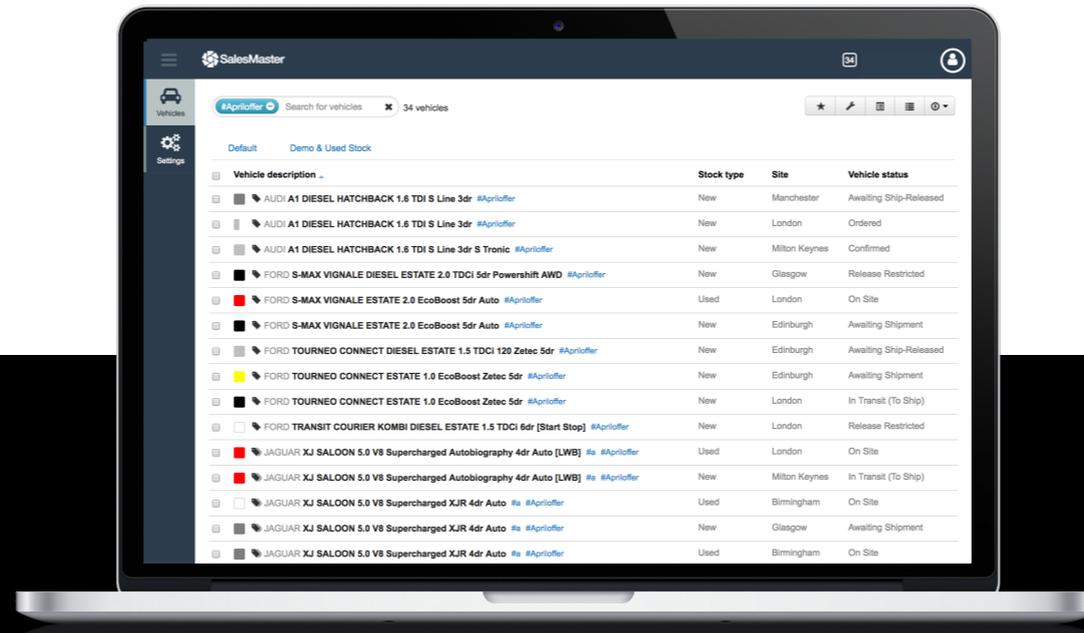




SalesMaster



StockBook Manual v3.0

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Welcome to SalesMaster. Our system uses various data feeds which are sent to us by your organisation. We use your DMS feed for Used vehicles and your Manufacturer feed for New vehicles. The data is combined and translated for you in one simple system, StockBook.

This makes StockBook the smartest way to sell your New and Used stock across your organisation.

StockBook is intuitive and simple to use, but we have created this manual to help get you up and running as quickly as possible.

We have also added some tips at the end to help you get the most out of our system.

We are always here to help. So if you get stuck, have a question or simply want to know more just drop us an email at support@salesmaster.co.uk

The StockBook Screen

The screenshot shows the SalesMaster StockBook interface. At the top, a dark blue header contains the SalesMaster logo, a search bar with a 'Search token' and 'Quick Search' label, and a user profile section with 'Access your profile' and 'Build Week' labels. Below the header, a left sidebar contains 'Vehicles' and 'Settings' options. The main area displays a table of vehicles with columns for 'Vehicle description', 'Stock type', 'Vehicle status', 'Build week', and 'Year'. A 'List View' label is positioned to the right of the table. A callout box titled 'The Options Bar' highlights a toolbar with icons for 'Saved Views', 'Search Builder', 'Column Chooser', 'Vehicle Options', and 'Export screen'. A 'Menu Bar' label points to the left sidebar.

Hides Menu Bar

Search token

Quick Search

Access your profile

Build Week

Menu Bar

The Options Bar

Saved Views

Search Builder

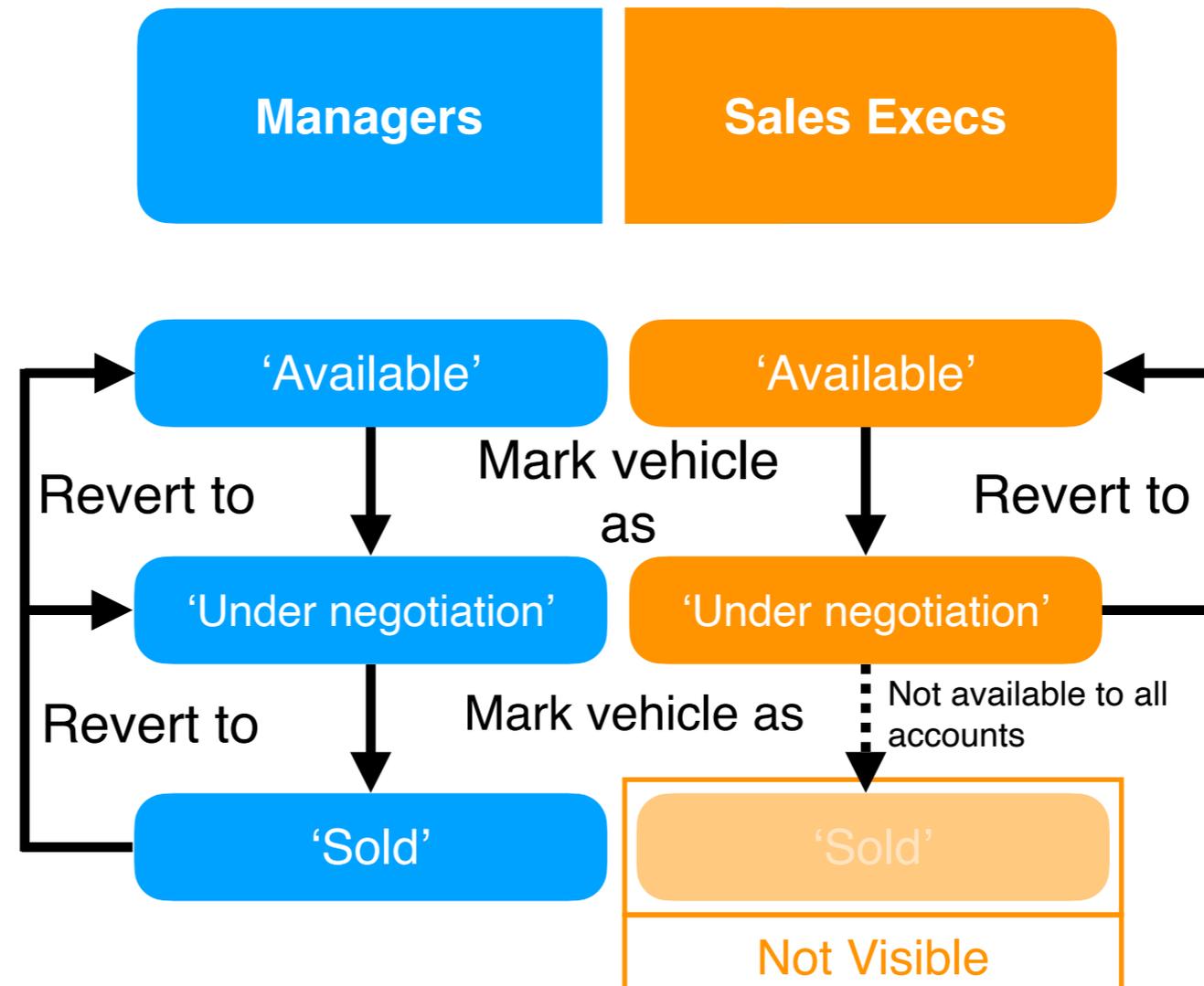
Column Chooser

Vehicle Options

Export screen

List View

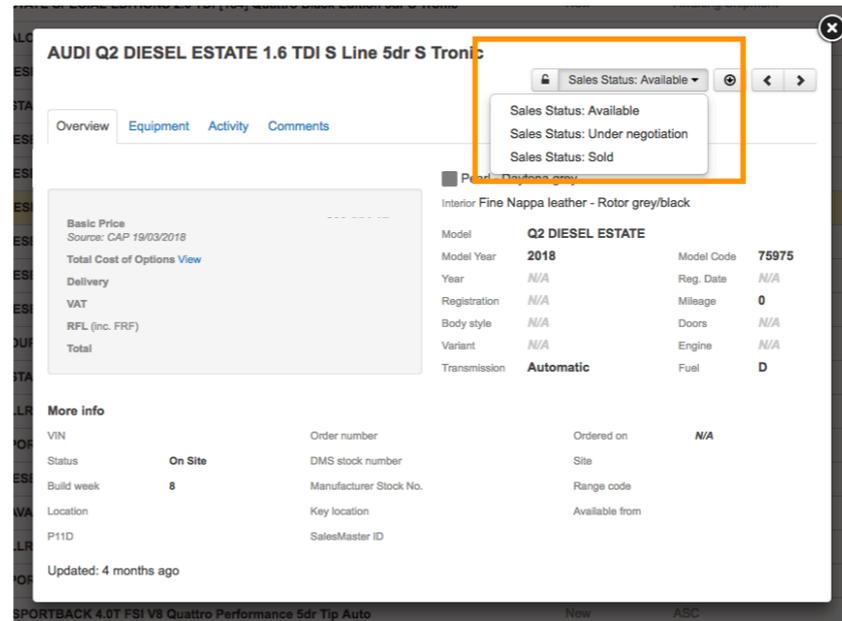
StockBook has been designed with vehicle sales being controlled via a Sales Status. Access to the various vehicle Sales Statuses are restricted by a user's job role.



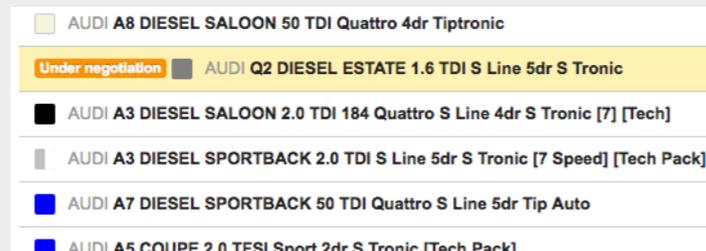
The 'Under negotiation' Sales Status has been designed to prevent other users from selling the vehicle you are offering to your customer. If you've made a sale, you should change the Sales Status to 'Sold' to secure the vehicle. Be careful, StockBook will automatically revert vehicles marked as 'Under negotiation' to 'Available' after a set period of time.

So that everyone is on the same page, StockBook will visibly indicate to other users when a vehicle has been marked as 'Under negotiation'.

To mark a vehicle as 'Under negotiation', firstly open the vehicle record by selecting the vehicle from the List View.

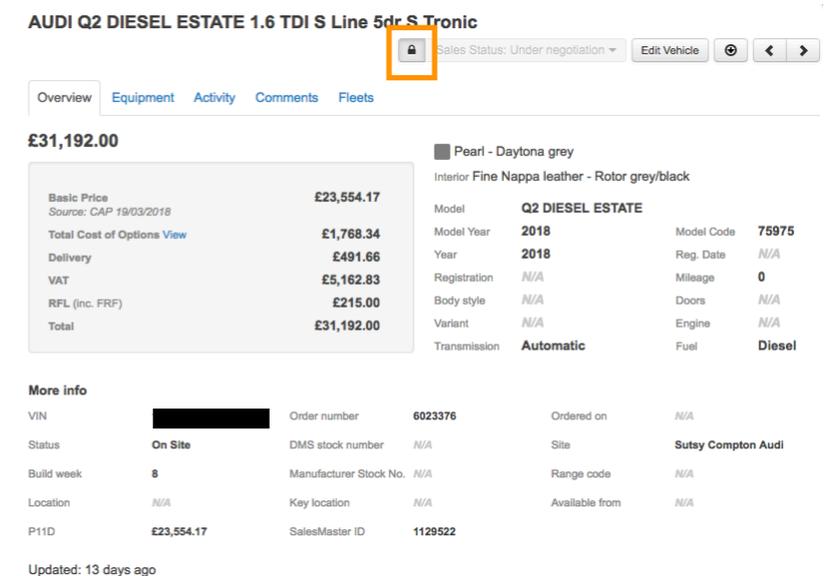


Click on the 'Sales Status' bar and select 'Under negotiation'.



The vehicle will now be flagged as 'Under negotiation' for all users to see.

The vehicle will be locked at 'Under negotiation' for a set period of time. During that time period, only you will be able to unlock the padlock.

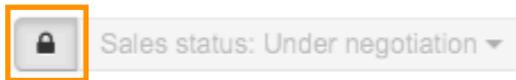


Marking vehicles as 'Sold'

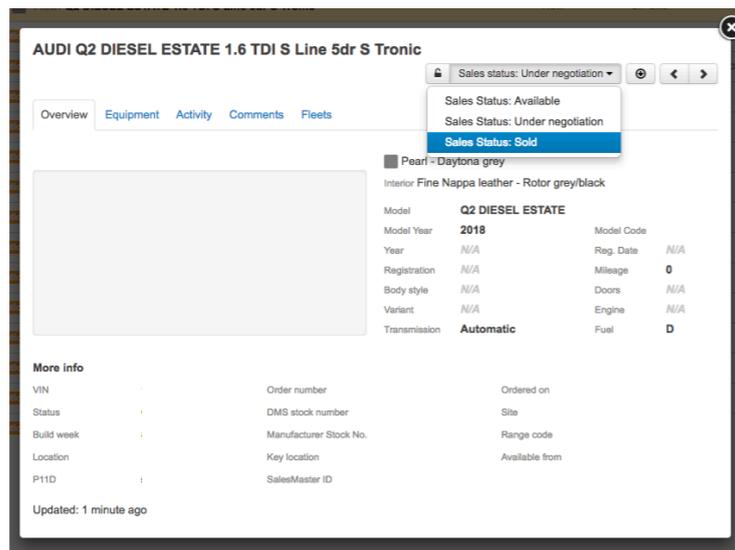
To mark a vehicle as 'Sold':

Vehicle description	Stock type	Vehicle status	Build week	Year
Under negotiation AUDI A1 DIESEL SPORTBACK 1.6 TDI SE 5dr S Tronic	New	Release Restricted	37	2018
Under negotiation AUDI A1 DIESEL SPORTBACK 1.6 TDI SE 5dr	New	ASC	17	2018
Under negotiation AUDI Q5 DIESEL ESTATE 3.0 TDI Quattro S Line 5dr S 1	New	ASC	43	2018
Under negotiation AUDI A1 DIESEL HATCHBACK 1.6 TDI SE 3dr	New	Confirmed	28	2018
Under negotiation AUDI Q2 DIESEL ESTATE 1.6 TDI S Line 5dr S Tronic	New	On Site	8	2018

Load a vehicle record by clicking on the line in the List View



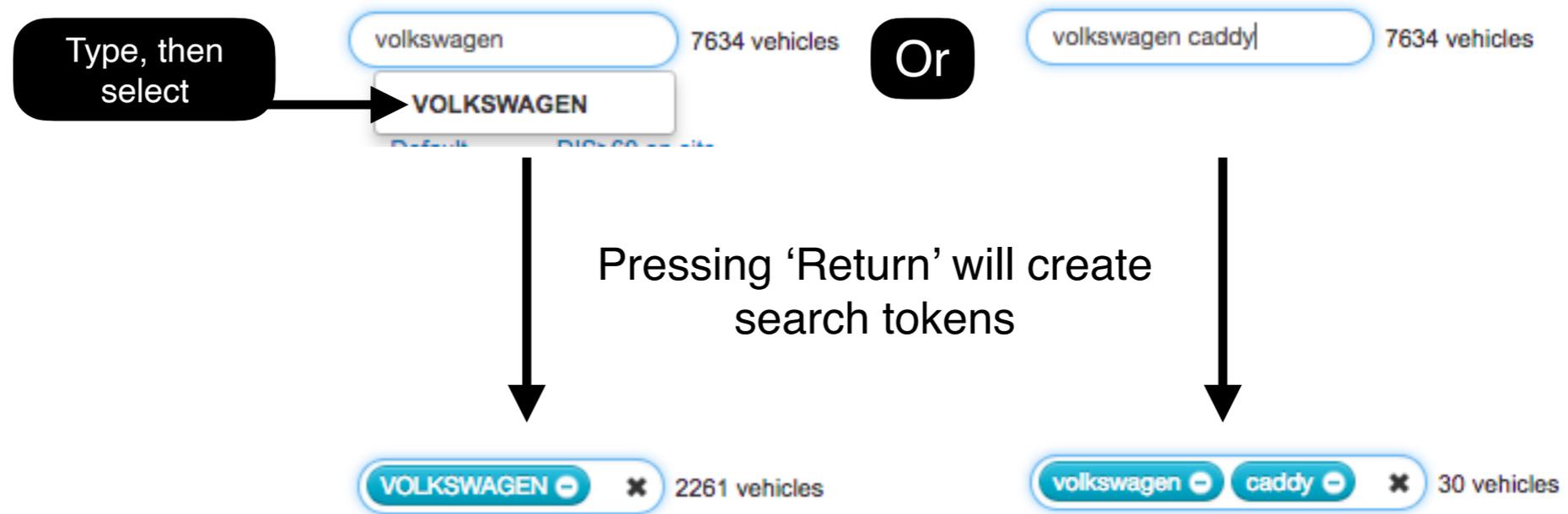
If you previously marked the vehicle as 'Under negotiation' you will need to click on the padlock to unlock the vehicle.



Click on the 'Sales Status' dropdown and select 'Sold'.

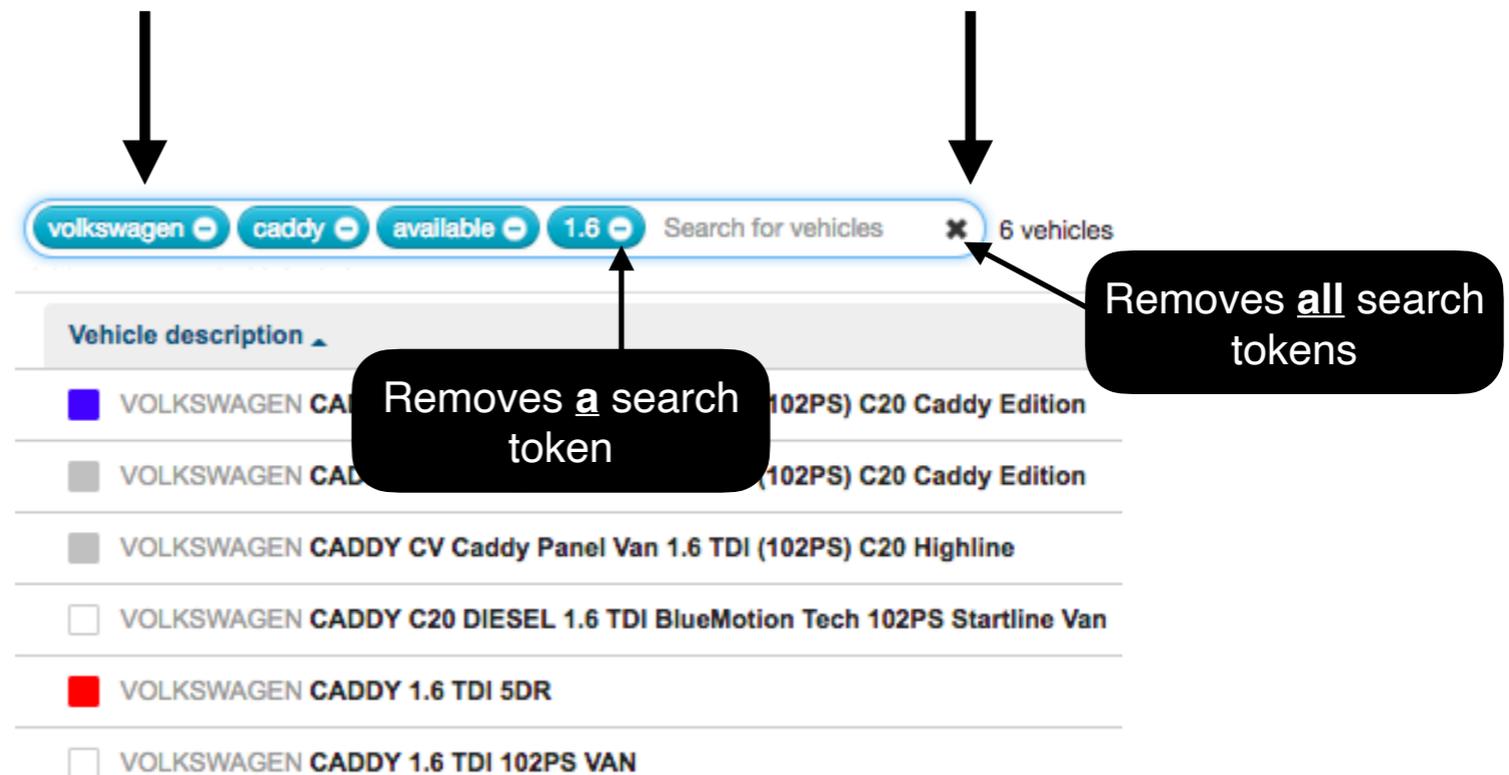
- **Managers** - will now see the the vehicle has been flagged as 'Sold' in the List View
- **Sales Execs** - As 'Sold' vehicles do not display for Sales Execs, the vehicle will now be removed from view

To search for vehicles, type a search term in Quick Search.



Keep adding search terms (tokens) until your desired vehicles display. The more search tokens you add the more the vehicles are filtered.

Search tokens can be removed using the '-' or 'x'. When a search token is removed the List View will update in real time.



Adding vehicle #tags

StockBook helps you to highlight campaign vehicles with vehicle #tags. To add #tags to a set of vehicles:

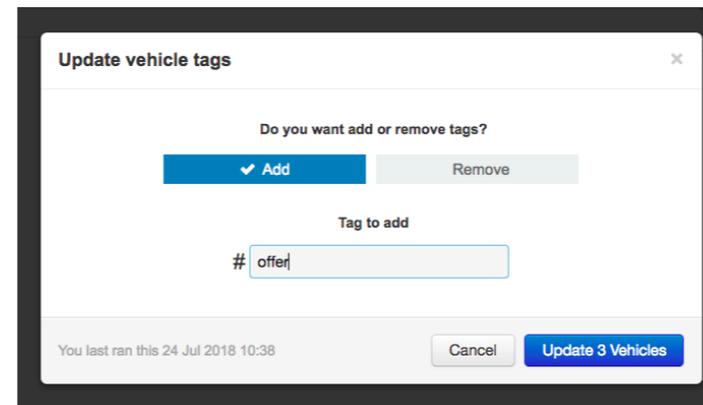
- Group the vehicles
- Use the checkbox to select the vehicles to add a vehicle #tags
- Click on the 'Manage tags' button in the top right hand corner.

3 of 6 selected [x Clear selection](#)



<input type="checkbox"/> Vehicle description	Stock type	Vehicle status	DIS	Sales Status
<input checked="" type="checkbox"/>  VOLKSWAGEN CADDY CV Caddy Panel Van 1.6 TDI (102PS) C20 Caddy Edition #Offer	Used	On Site	281	Available
<input checked="" type="checkbox"/> VOLKSWAGEN CADDY CV Caddy Panel Van 1.6 TDI (102PS) C20 Caddy Edition	Used	On Site	133	Available
<input checked="" type="checkbox"/> VOLKSWAGEN CADDY CV Caddy Panel Van 1.6 TDI (102PS) C20 Highline	Used	On Site	129	Available
<input type="checkbox"/> VOLKSWAGEN CADDY C20 DIESEL 1.6 TDI BlueMotion Tech 102PS Startline Van	Used	On Site	110	Available
<input type="checkbox"/>  VOLKSWAGEN CADDY 1.6 TDI 5DR	Trade	On Site	59	Available
<input type="checkbox"/> VOLKSWAGEN CADDY 1.6 TDI 102PS VAN	Trade	On Site	41	Available

Enter the name of the #tag you wish to add and click the update button.



Update vehicle tags

Do you want add or remove tags?

Tag to add

offer

You last ran this 24 Jul 2018 10:38

The same process can be used to remove #tags from vehicles. #tags are visible to everyone, however, only managers are able to add or remove #tags.

#Offer Search for vehicles [x](#) 1 vehicles

<input type="checkbox"/> Vehicle description
<input type="checkbox"/>  VOLKSWAGEN CADDY CV Caddy Panel Van 1.6 TDI (102PS) C20 Caddy Edition #Offer x

To search by a #tag, simply type the #tag's name into Quick Search or click on a #tag in the List View.

This section will cover how to:

- Adjust the displayed columns
- Filter vehicles
- Make use of and access previous created reports
- Export data from StockBook

Adjusting the displayed columns

Your List View is made up of a series of columns. To adjust these open 'Column Chooser'.



Drag and drop the columns, to build the view you need.

volkswagen caddy available 1.6 Search for vehicles 6 vehicles

Columns in use - drag to re-arrange column names (use default)

Available columns - drag column names to the box above to see them in your search results

General Geolocation Funding ALL

Account, Adoption status, Attachment count, Autoexposure, Autoexposure feed, Available from, Basic price, BIK%, Body, Body group code, Bookable, Brand, Brand code, Build date, Buy back on, Call off date, CAP, Cap, Cap derivative, Cap manufacturer, Cap model, Cap valuation at, Cap value, Cap value below, Cap value clean, Cap value retail, Carwow enabled, Carwow offer price, Check point date, Colour, Comments, Commission, Company, Configurator code, Consignment date, Consignment number, Consignment status, CO₂, Created at, Currency, Current fleet code, CV, Date sold, Defleet date, Defleet date override, Delivery charge, Derogation, Display, Distance, DMS stock No., Doors, Drive, DTM %, Engine number, Engine size, Equipment, Equipment cost, Estimated delivery date, Extension code, Factory order code, Factory order date, First date on fleet, Fleet average miles per booking, Fleet average miles per month, Fleet days on bookings, Fleet name, Fleet number of days on, Fleet status, Fleet status description, Fleet status set at, Fleet status set by, Fleet total bookings, Fuel, Fuel type, Funded, Funded on, Funding plan code, Funding plan name, Funding tran, Future bookings count, Future days booked, Geo last updated at, Geo status, Guaranteed future value, Handover date, Has active bookings, Has attachments, Has booking, Has images, Home location, Id, Image count, Image status, Initial stand in value, Inspection costs, Interior, Key location, Last appraised at, Last date on, Last defleet date, Last fleet status change date, Last known coordinates, Last negotiated by, Last negotiated by site, Last order change date, Last under negotiation, Last updated, description, Logistics status, Manufacturer Stock No., Model category, Model code, Model extension, Model name, Model year, Offer price, Order number, Ordered at, P114, PDI complete, PDI status, Portfolio, Preparation costs, Price source, Price source data, Production year, Publish, Purchase order No., Purchase price, Purchased at, Range code, Reg No., Reg No. updated at, Registration data, Registration year, Rental group, RFL, SAC Code, Sales status locked, Save vehicle, Site region, SIV plus non-rec costs, Sm data fingerprint, Sold by, Sold by site, Stand in value, Status lock, Supplier, Total, Total non recoverable costs, Total offers, Total times rated, Transmission, Transmission type, Type, UK arrival date, Unit fund end date, Updated by, Updated by name, Uuid, Variant, VAT, VAT qualifying, Vehicle age, Vehicle description CAP, Vehicle description DMS, Vehicle description MAN, Vehicle location code, Vehicle margin, Vehicle margin %, Vehicle physical location, Vehicle status code, VIN, VIN updated at, VNS protect end date, Web status, WIP No., Year MVRIS, Year range_code

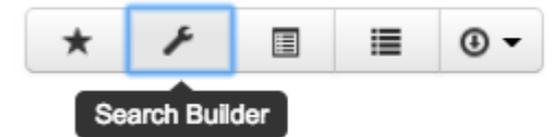
Drag to Add

Drag to Remove

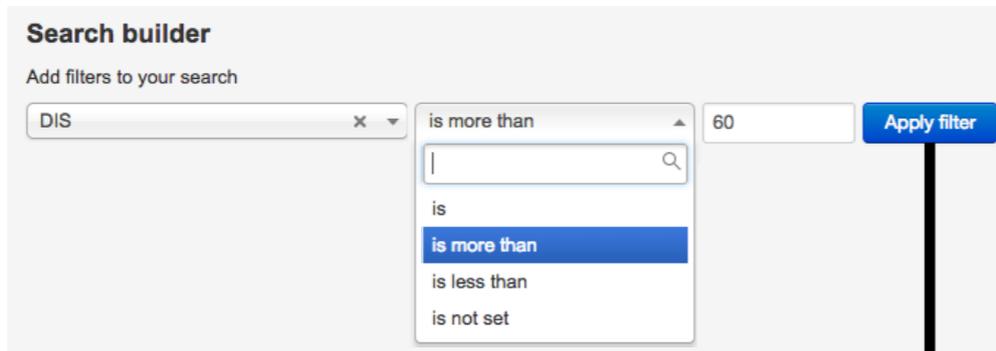
Vehicle description	Stock type	Price	Mileage	Site	Vehicle status	Build week	Year	DIS	Sales Status
VOLKSWAGEN CAI	Used	£13,495.00	17,064		On Site		2016	177	Available

Filtering of vehicles

Search Builder helps you filter the displayed vehicles by a specific value.



To do this, open Search Builder and select the column you wish to filter the vehicles by.



Once you have selected the column you need and determined how you wish to filter the value(s), click the 'Apply filter' button. A bespoke search token is created and a search has started.



Vehicle #tags, Search Builder and Quick Search can all be used together to create a highly specific set of filters.



Once you have built your report you can:

- Save it for quick access
- Share it with other StockBook users (*within your dealer group*)
- Export the data out of StockBook

Saving a report for quick access

To have instant access to your report, firstly convert your screen into a Saved View by:

1. Opening the Saved Views panel



2. Entering a title for your report

The screenshot shows the SalesMaster interface with a 'Save this view' dialog box open. The dialog has three tabs: 'Save this view', 'My views', and 'Shared views'. The 'Save this view' tab is active, showing a 'Label' input field with the text 'Blue Available Audi' and a 'Save' button. Below the dialog, there is a table of vehicle data.

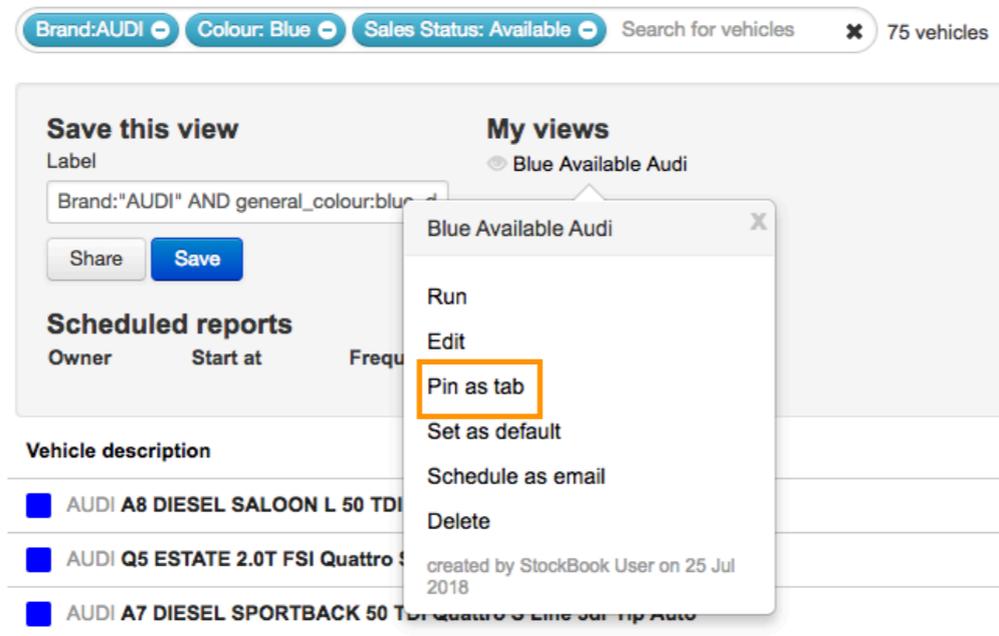
Vehicle description	Stock type	Vehicle status	Build week	Year
AUDI A8 DIESEL SALOON L 50 TDI Quattro 4dr Tiptronic	New	Release Restricted	18	2018
AUDI Q5 ESTATE 2.0T FSI Quattro Sport 5dr S Tronic	New	Confirmed	41	2018
AUDI A7 DIESEL SPORTBACK 50 TDI Quattro S Line 5dr Tip Auto	New	Awaiting Shipment	14	2018

3. Clicking the Save button

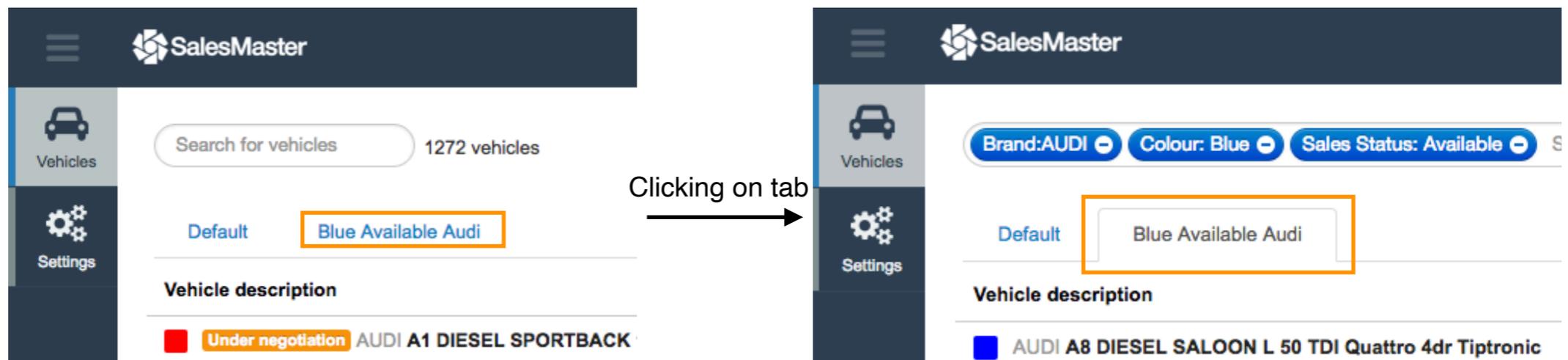
Saving for quick access (continued)

After refreshing your screen, reopen the Saved Views panel and:

5. Click on the Saved View you just made (under 'My views')
6. Select 'Pin as tab'



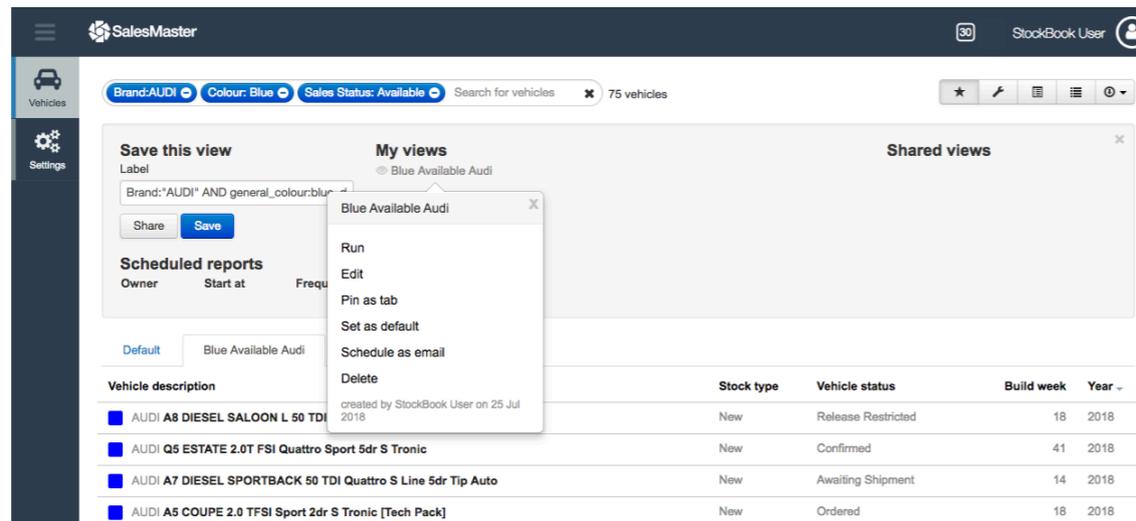
The next time you load the Vehicles List View, simply click on the tab to access the report



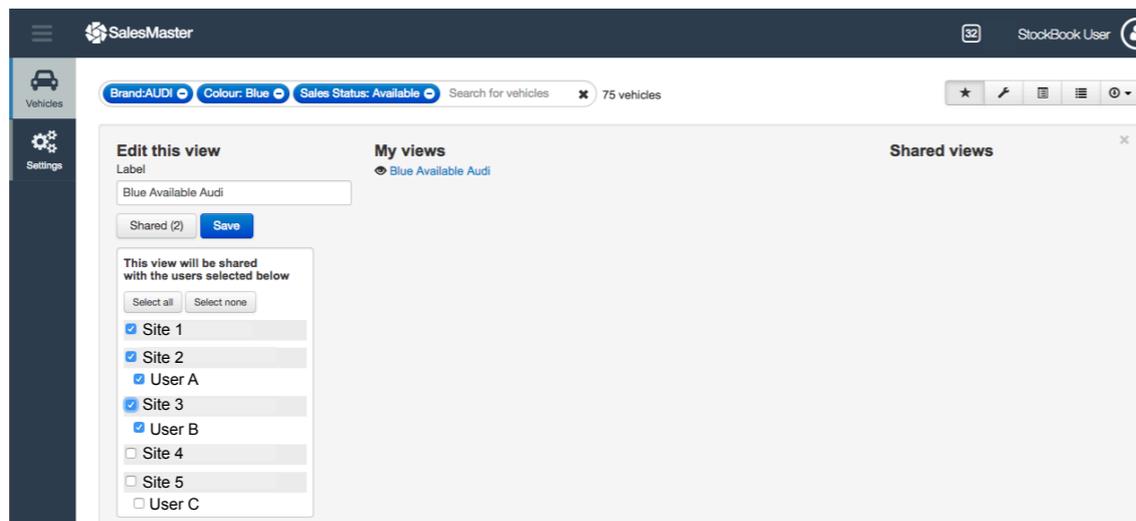
Sharing a report with other StockBook users

Once you have created a Saved View:

1. Click on the Saved View
2. Select 'Edit'



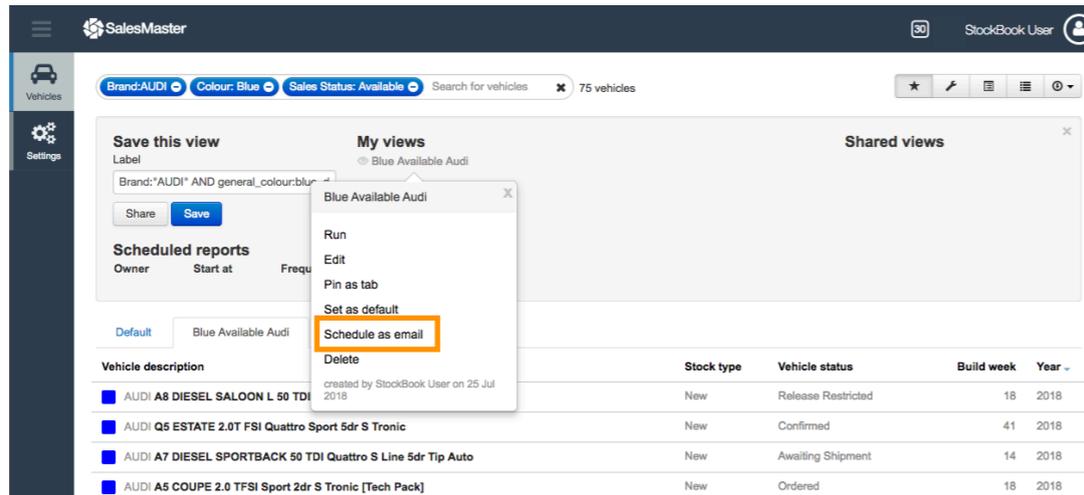
3. Click the 'Share' button and tick which users you wish to share the view with before clicking 'Save'



Scheduling the report to send as an email

Once you have created a Saved View:

1. Click on the Saved View
2. Select 'Schedule as email'



3. Use the form to schedule when the report is sent to you

Add Scheduled Report

* Frequency: Weekly

* Days: S M T W T F S

* Time: 00 : 0

* Starts on:

* Format: Excel

Recipients (optional):

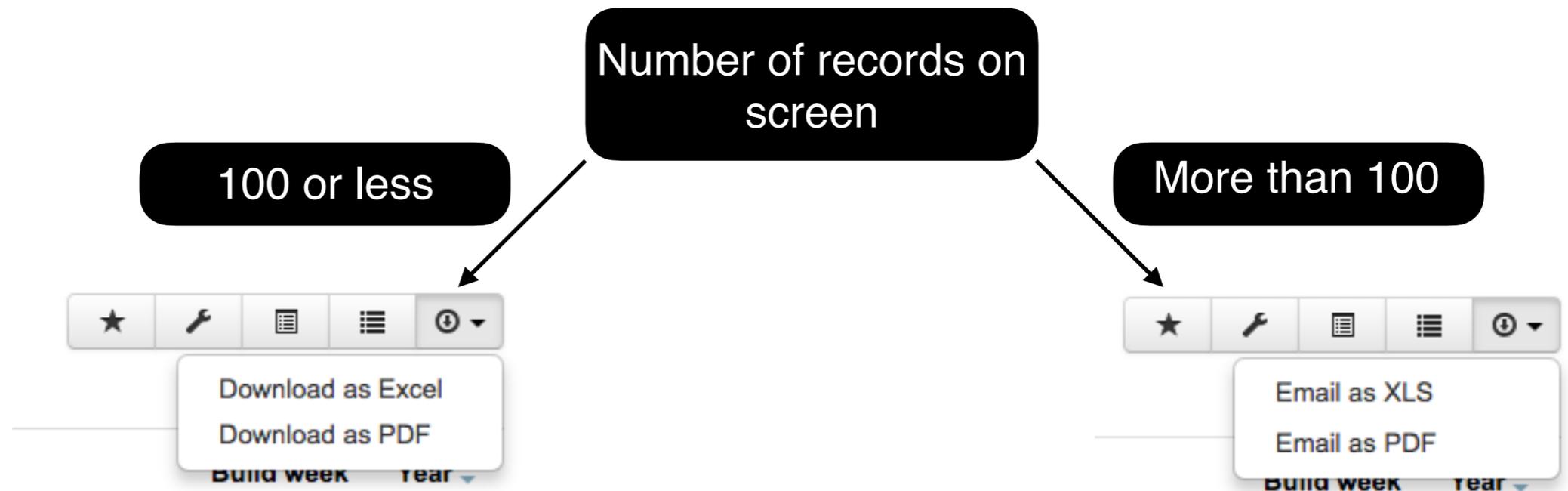
Note: email addresses should be comma separated

You can select the report to send as an Excel or a PDF file.

Adding email addresses to the 'Recipients' box will send the report to additional users.

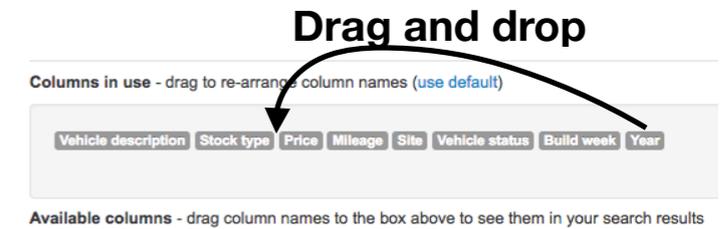
Export data from StockBook

At any point when using StockBook, you can export the data displayed on the screen to Excel (XLS) or PDF. StockBook will allow you to download your file to your browser, if the number of on-screen records is 100 or less. For more than 100 records StockBook will only allow you to request a file via email. Emailed files should arrive to your inbox within minutes.



Reordering columns

Displayed columns can be reordered using drag and drop.



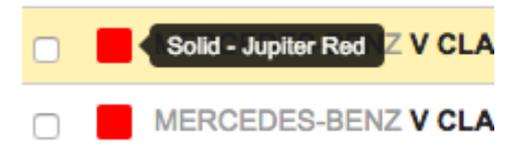
Removing 'Sold' vehicles from view

Managers may wish to see all vehicles which are eligible for sale. This can be done by removing 'Sold' vehicles using the search token '-sold'.



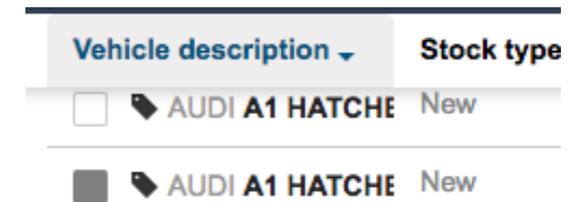
Instantly see a vehicle's colour description

The colour swatches visually show you the general colour of the vehicle. However, if you hover the mouse over the swatch you can see the exact colour.



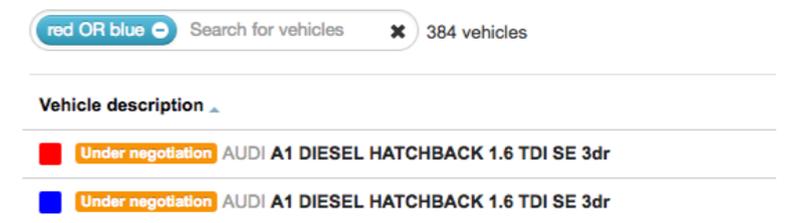
Sort the vehicles by a column

Clicking on a column header will sort the vehicles by the values in that column.



Widen your searches with an 'OR'

Typing an 'OR' between two search terms will include both possibilities



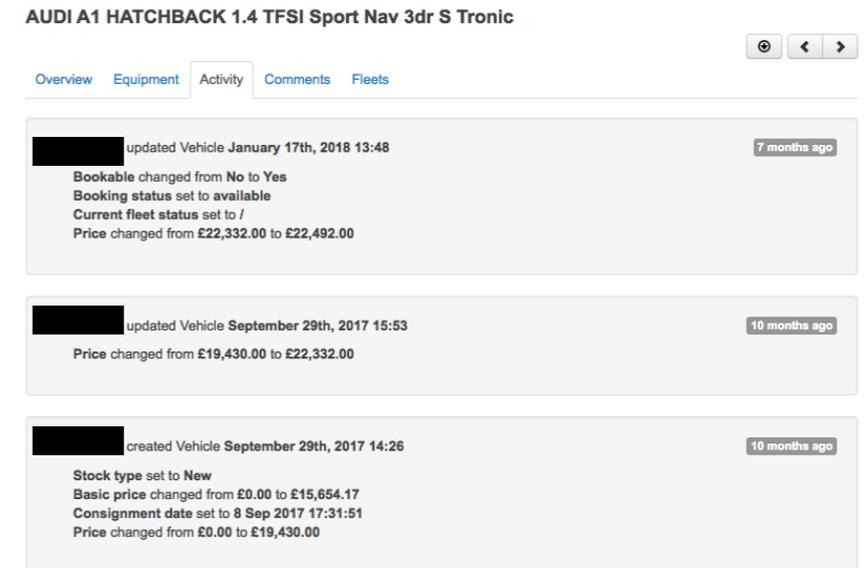
Access a PDF spec sheet for Used vehicles

To access a PDF vehicle spec sheet, click on the download icon in the top right of the vehicle record and select 'Download PDF Spec Sheet'.



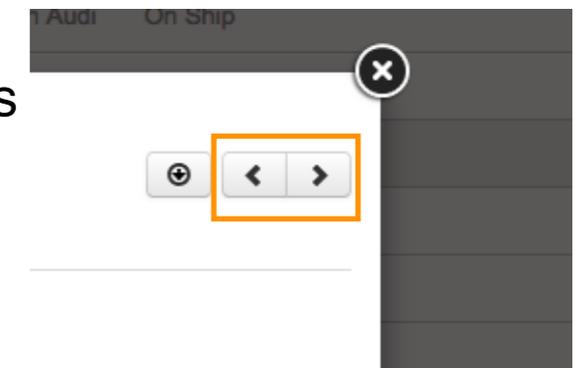
View a vehicle's equipment and audit

Within a vehicle's record you can view tabs on 'Equipment' and 'Activity'. The 'Activity' tab records actions and changes applied to the vehicle.



Quickly move between vehicle records

When you are in the vehicle record you can use the arrow buttons to quickly move to the next or previous vehicle in the List View.



View the options of all vehicles in your search at a glance

Click on the 'Vehicle Options' button to display each vehicle's options within the List View

