Introduction to Motorcentral

Illustration of the common functions you can perform using Motorcentral

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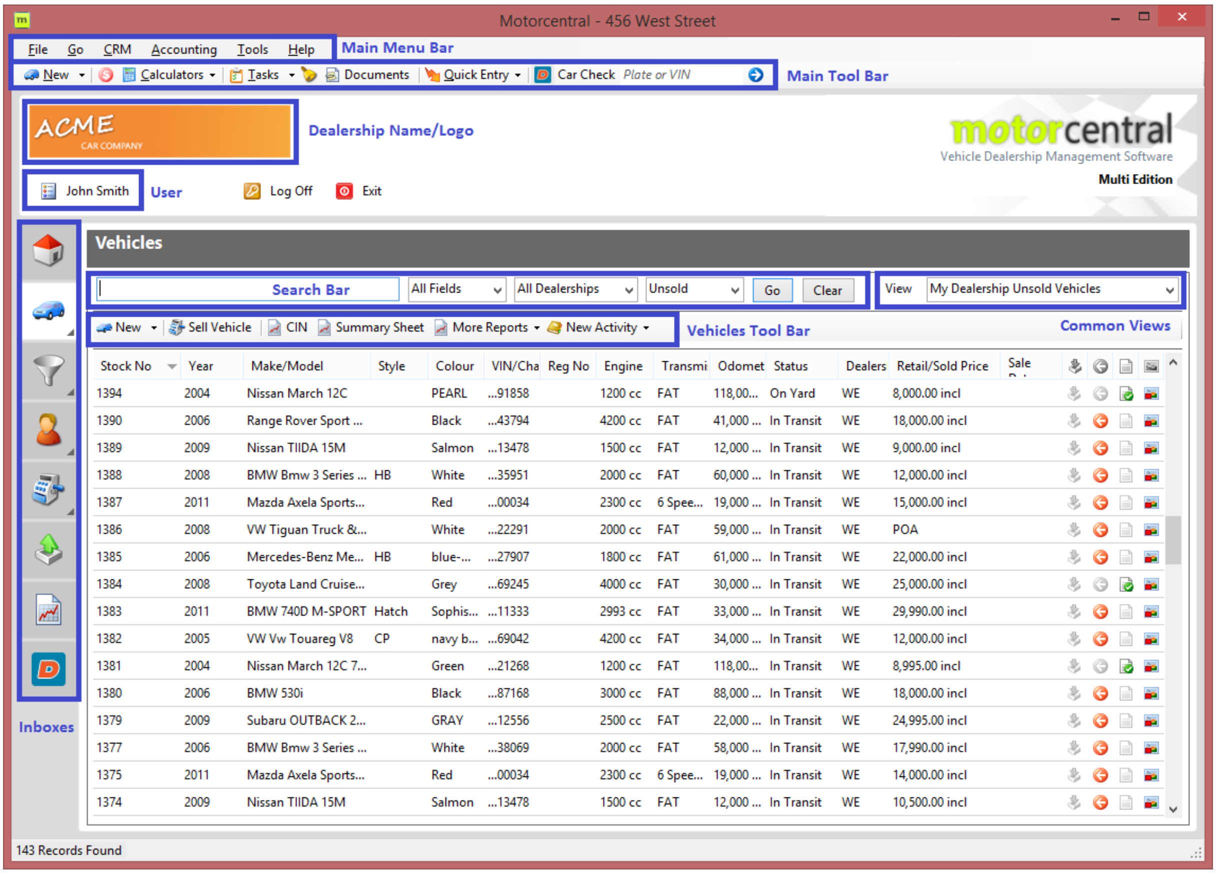
Screen Layout



Motorcentral uses a standard layout with elements familiar to Microsoft Windows users.

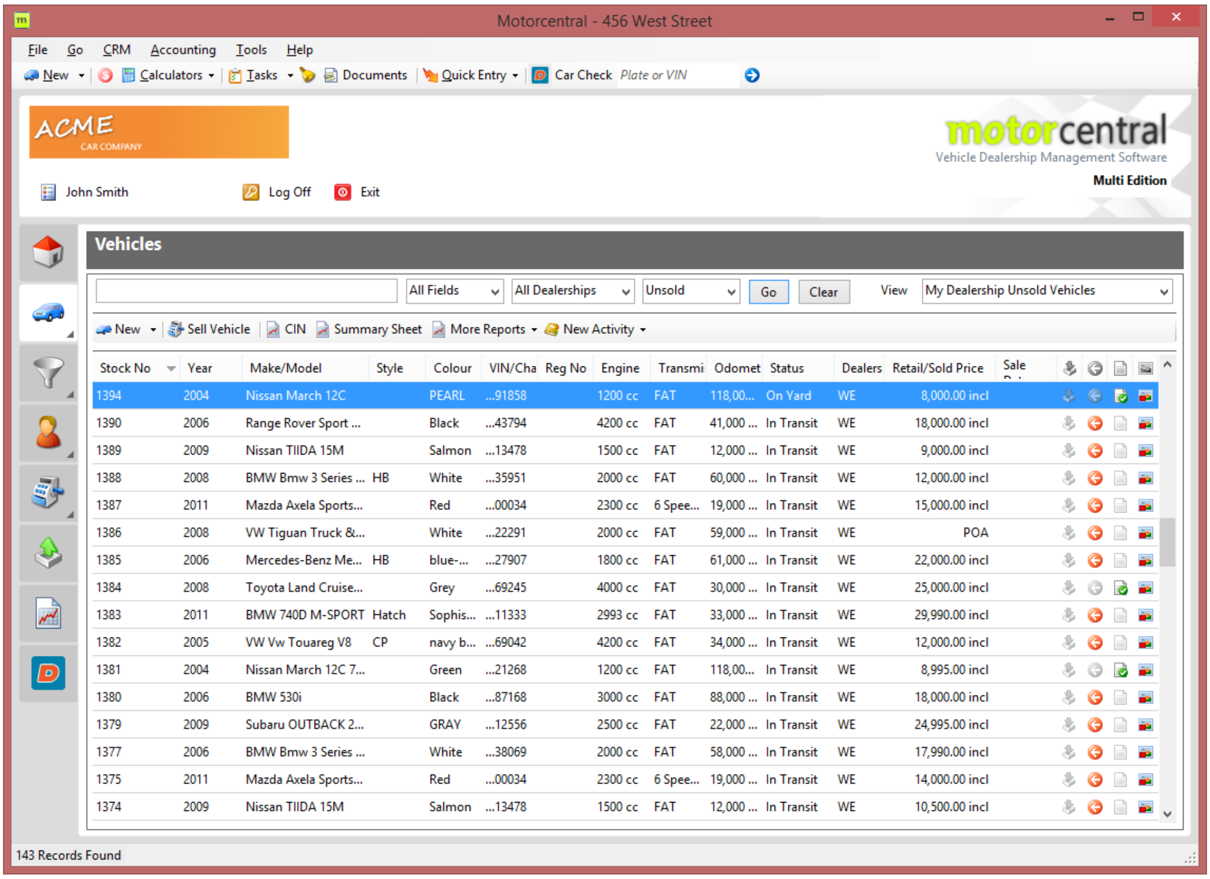
At the top there is a Main Menu Bar with access to most of the program functions, the most commonly used ones are in the Main Tool Bar. Below that there is an area where the dealership and the currently logged on user are identified.

Finally there are Inboxes on the left-hand side to access the various Inboxes, being Vehicles, Opportunities, Contacts, Sales, Exports, Reports and Dealerzone. When each of these is clicked, the corresponding Inbox opens on the right-hand side.

Each inbox has a Search Bar which can be used to filter down data and find specific records, Common Views can also be accessed quickly on the right of that. There is also a Tool Bar with the common functions related to that area.

Finally there are the various records shown in a table format, where they can be opened by being double clicked. The right mouse click also shows various functions which can be performed on the records.

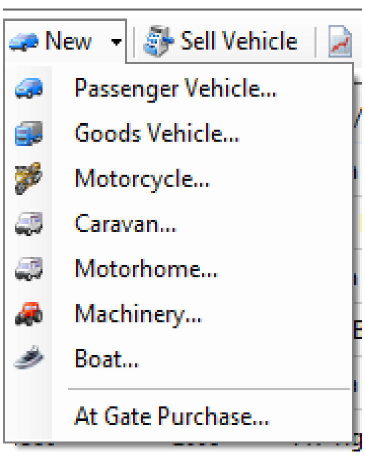
Managing Stock



Motorcentral automatically opens on the screen showing the stock list

You search using make, model, stock no and other common fields, you can filter down by dealership or status, such as Sold or In Transit vehicles.

You can add a new vehicle, print a CIN or perform other common functions in the toolbar. If you want to create a new vehicle with a different vehicle class or based on a template, then click on the small down arrow next to the new vehicle button.



You can create Passenger Vehicles (Cars), Goods Vehicles (Trucks), Motorcycles, Caravans, Motorhomes, Machinery and Boats. Motorcentral collects slightly different data on each vehicle class as appropriate for that class.

You can also create vehicles based on a template such as At Gate Purchase. You can create and manage your own Vehicle Templates in Motorcentral to jump start the process of introducing a new vehicle into stock.

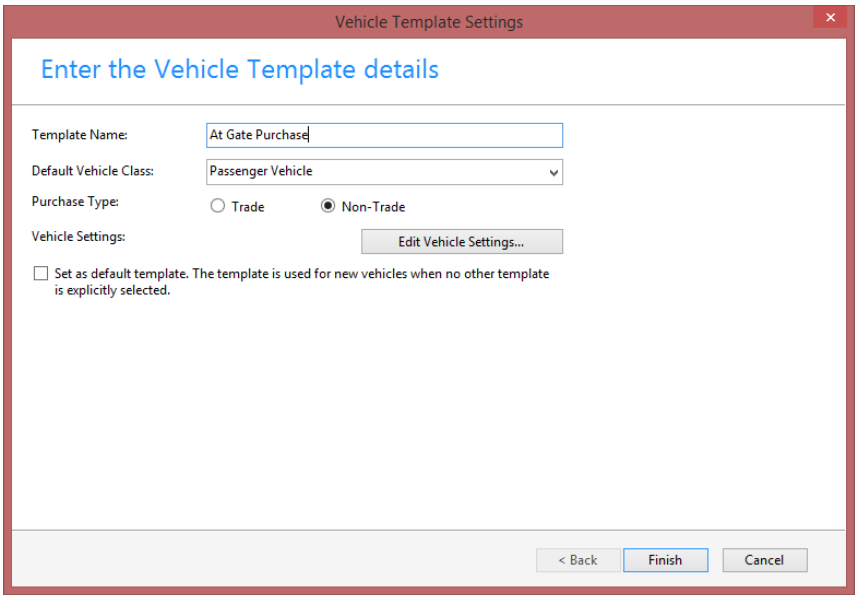
Adding a Vehicle into Stock

Creating a Blank Vehicle

Adding a blank vehicle, you can do that using the New button in the vehicle Tool Bar, this will create an blank unpopulated vehicle where you can enter the make, mode and all other vehicle fields.

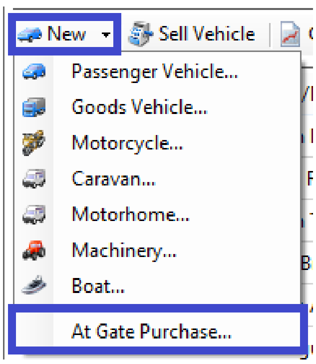
Creating a Vehicle from a Vehicle Templates

If you have common settings that you want your new vehicles to have, such as expenses, export settings. You can create a Vehicle Templates with all those preferences, you can create and manage Vehicle Templates in the Main Menu Bar under Tools > Vehicle Templates.



When you create a new Vehicle Template, you need to give it a name to use for referring to it, then click Edit Vehicle Settings, the opens a Vehicle editing screen where you can set what you want that Vehicle Template to have.

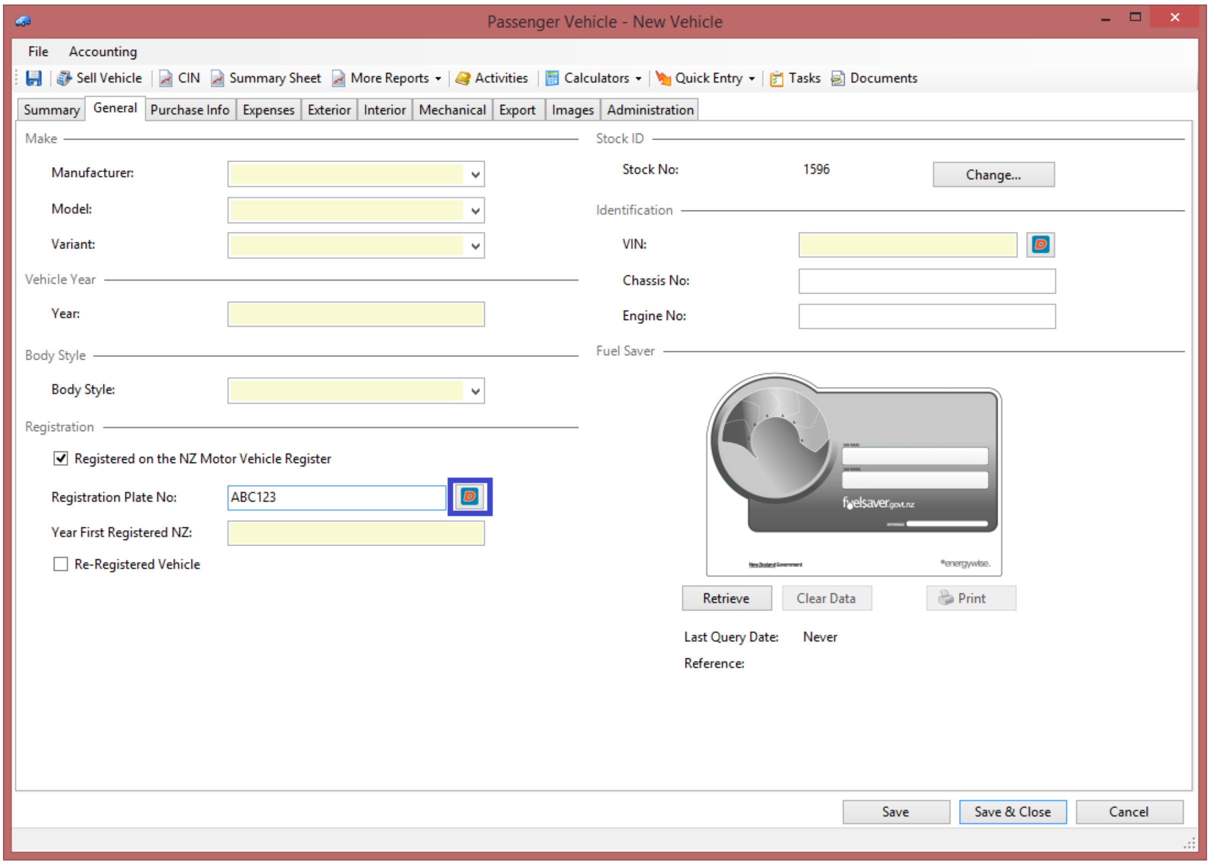
The Set as default Template option can be used to mark this template as the default Vehicle Template to be used when a new vehicle is created.



In the image opposite, clicking New will create a blank vehicle unless a default Vehicle Template is set, in which case the default Vehicle Template will be used.

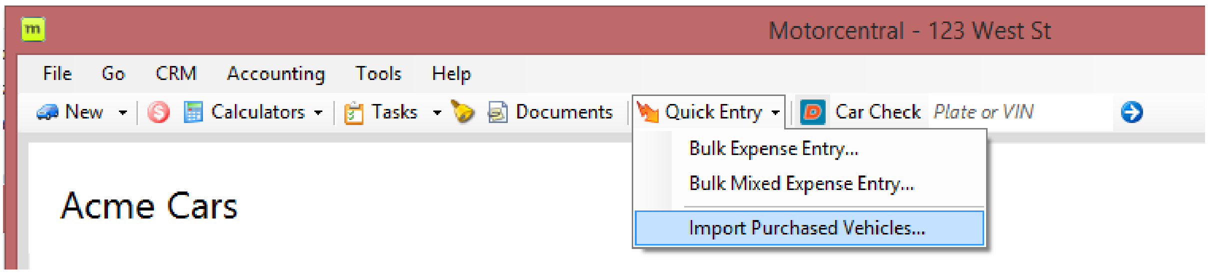
Clicking on any Vehicle Template explicitly such as “At Gate Purchase” will create a new vehicle using that Template.

Creating a Vehicle from Car Check

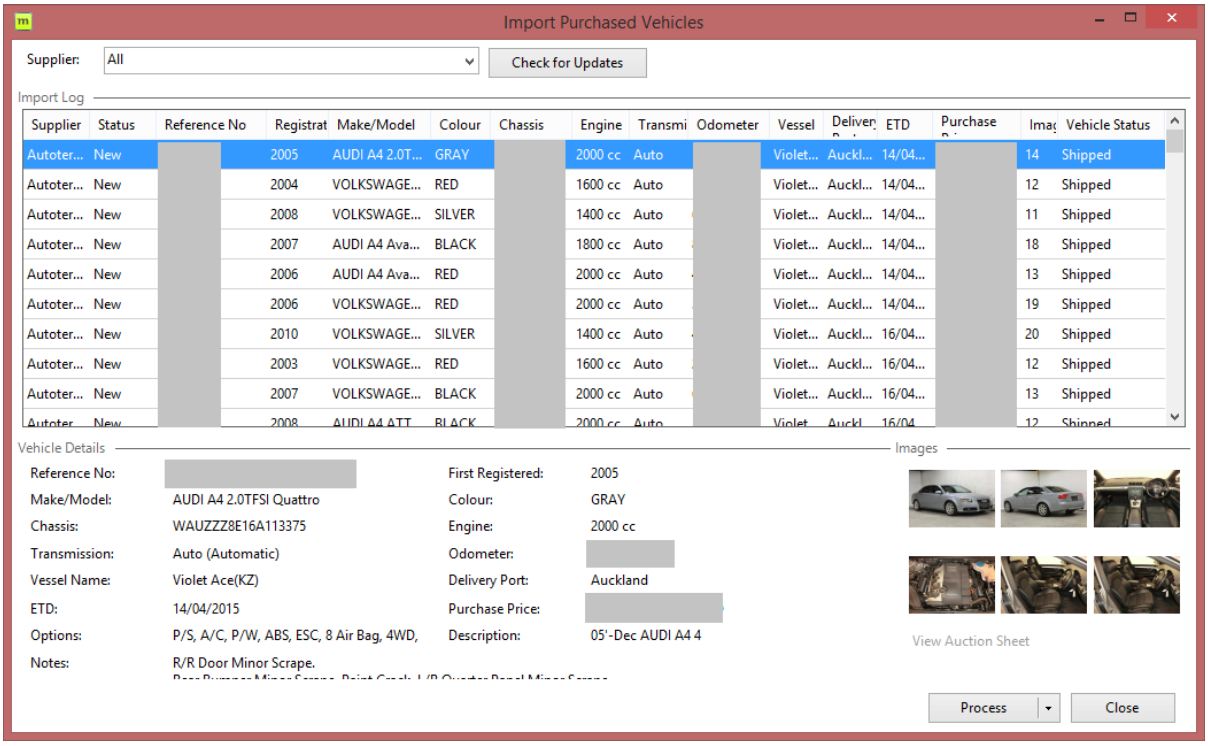


You can create a vehicle from a Car Check by entering its Registration Plate No or VIN then clicking the Dealerzone button next to that. This is especially useful for Trade-Ins where you've already run a check on the vehicle and you can leverage that data to reduce any data entry.

Creating a Vehicle from Importer Information



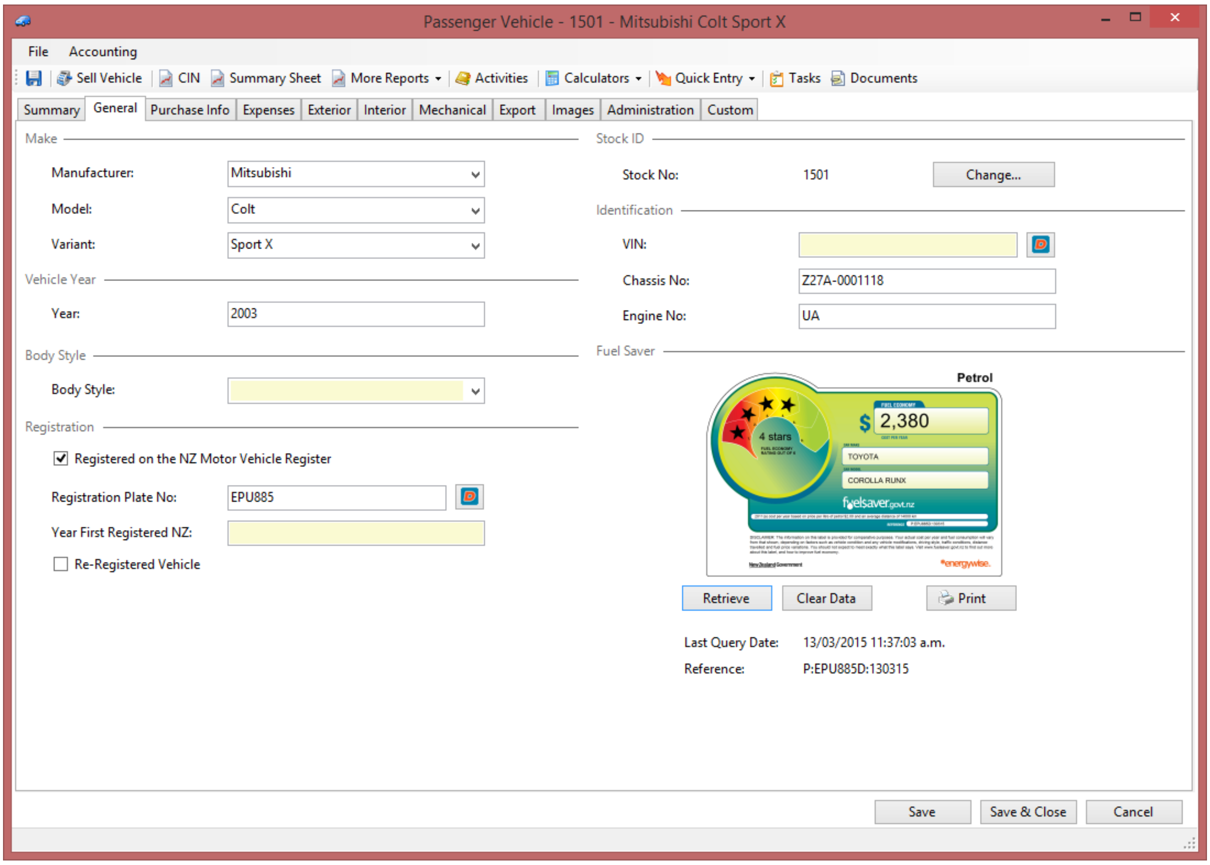
Motorcentral can import vehicles from the systems of major vehicle importers, the complete list of importers can be found under Tools > Extensions, Vehicle Importers.



You can automatically download vehicle information including photos, auction sheet and other information collected by the importer. This also acts as a tool to manage the timely entry of imported vehicles into stock.

Populating Vehicle Details

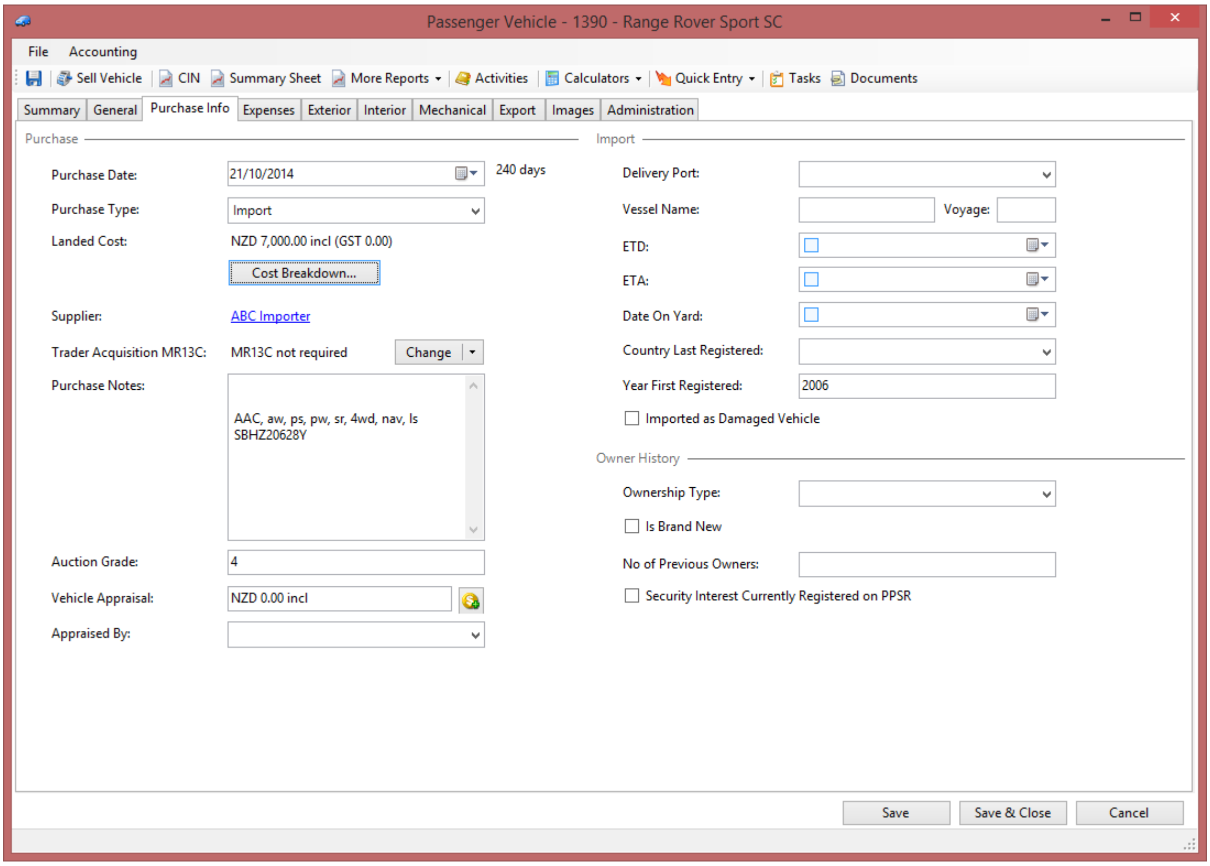
Once a vehicle has been added to stock, you can complete the information needed to prepare it for advertising, there are a number of tools to simplify this process including connection to Fuel Saver services and being able to take photos from your phone.



You can move across the information tabs across the top where the vehicle information is grouped. There is General, Purchase Info, Expenses, Exterior, Interior, Mechanical, Export, Images and Administration information for Passenger Vehicles, these may differ slightly for other vehicle classes.

Purchase Information

You can record all purchase details under the Purchase Info tab, if the vehicle was imported via the Import Purchased Vehicle tool then some of that information will be populated based on what information is provided by the importer.

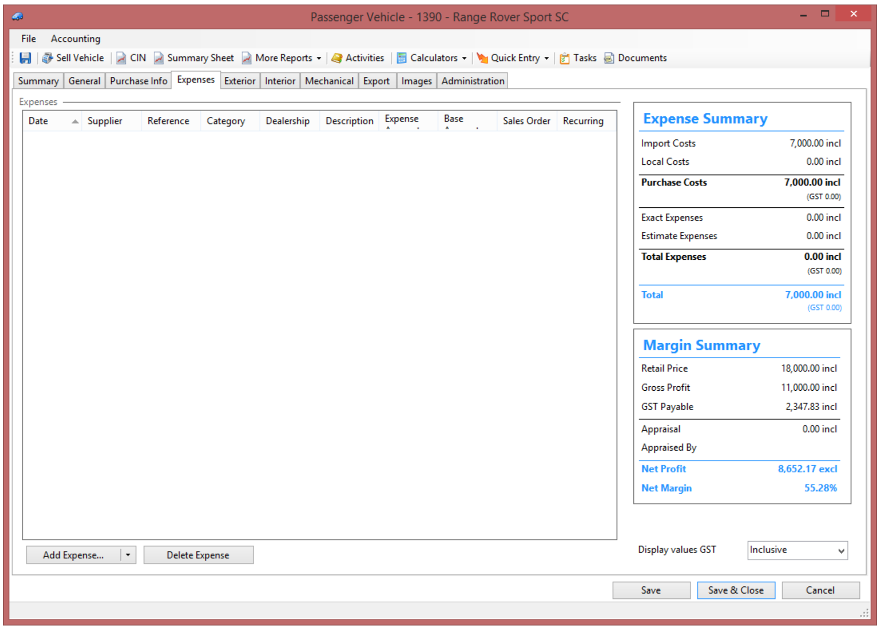


Clicking on the Cost Breakdown button will open a detail screen of costings where you can manage the price paid, foreign currency, cost of freight, GST paid and other expenses associated with the acquisition of the vehicle.

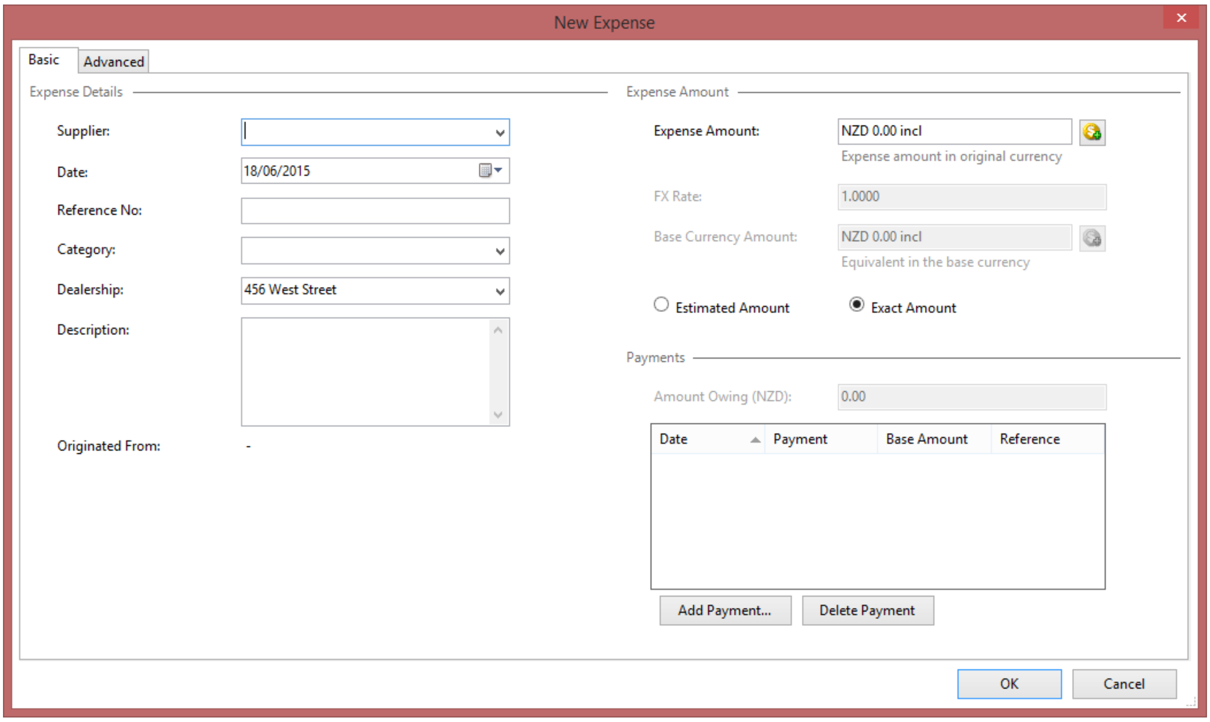
If appropriate you can also complete the Notice of Trader Acquisition or MR13C from this screen.

Entering Expenses

You can enter expenses such as reconditioning in the Expenses tab, Motorcentral will track the profitability of the vehicle and show you where the vehicle cost stands using the summary on the right-hand side of that screen.

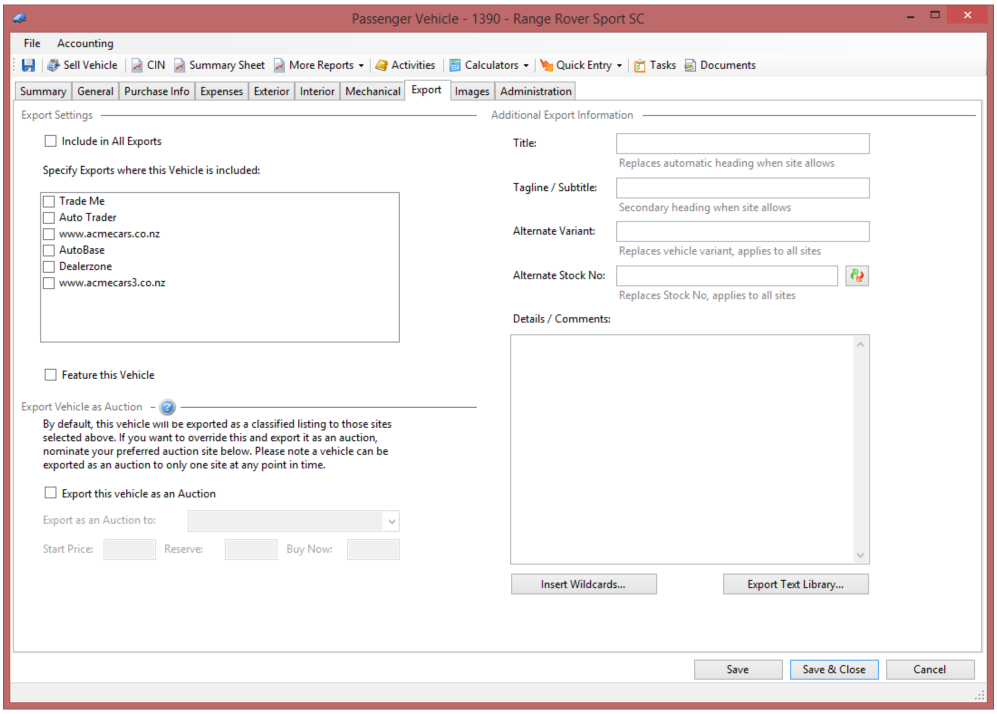


You can enter new expenses using the Add Expense button, where you can enter information such as supplier, date, reference, category, description and the expense amount. You can also indicate whether this expense is an estimate. The estimate flag and the category selection can be used for accounting and reporting later on.



Export Information

This is where advertising settings and information can be set for each vehicle. In Motorcentral you can send a vehicle to all advertising sites or you choose specific sites each vehicle is sent to. The most critical area in this screen is the Details/Comments field which forms the text sent to advertise your vehicle.



Motorcentral has two sets of tools to help you get things started with this text. The Export Text Library where you can program and use text you commonly use such as your "why buy from us" text or a starting point for describing a "family car". Writing good text takes time and being able to access it easily can help you make the most out of it.

The second tool is the Insert Wildcards, this tool allows you to insert wildcards or place holders which Motorcentral will then replace with actual values when exporting the text to an advertiser.

For example you can have:
"This is the best {Manufacturer} {Model} in town."

Which Motorcentral will translate to:
"This is the best Honda Civic in town", where the vehicle is a Honda Civic

Or you can have:

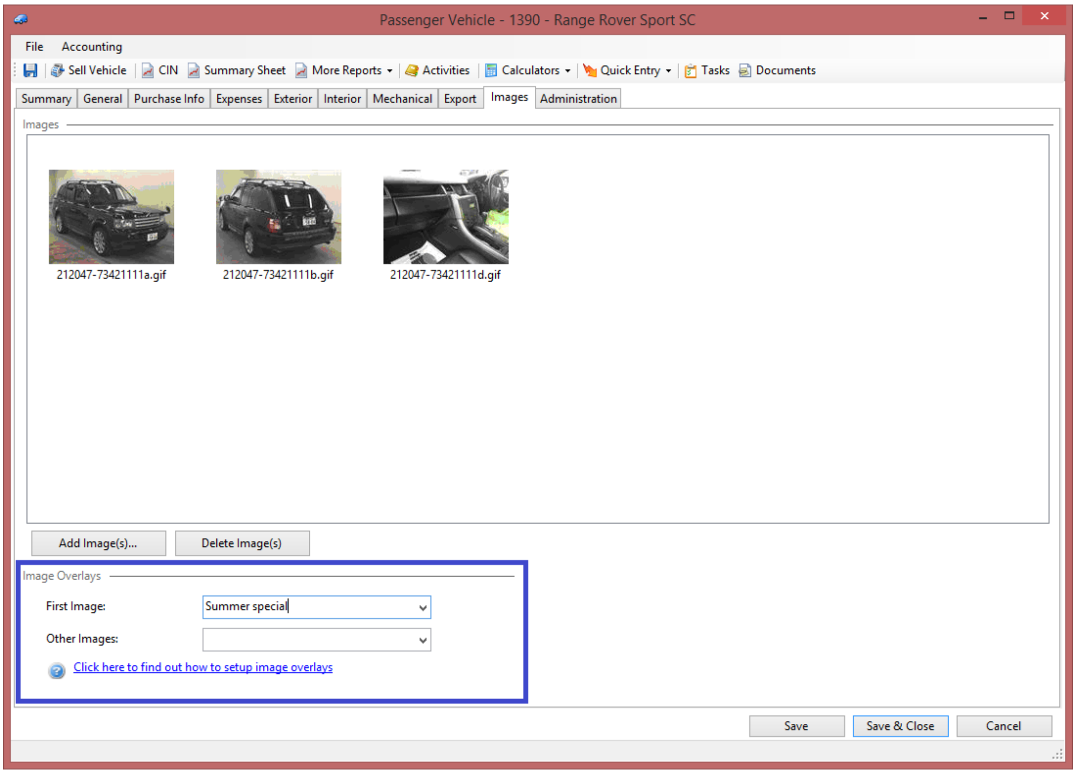
"Buy this car from ${FinanceFinanceRepaymentPerWeekCaption} per week*.
* {FinanceRepayableTotalAmountCaption}"

Which Motorcentral will translate to:
"Buy this car from $61.21 per week*.
* Total Amount Payable $15,205.49", based on finance parameters set under the dealership.

Motorcentral has a whole set of very useful wildcards including finance declarations and other items very relevant to the CCCFA laws.

Specifying Image Overlays

You can create an image overlay under Tools > Image Overlays, the assign that to vehicles automatically using the template or on vehicle-by-vehicle basis under Images. If you need assistance with creating an Overlay please get in touch with us.



Here are some examples of what overlays could look like when exported to an advertiser.

Administration Information

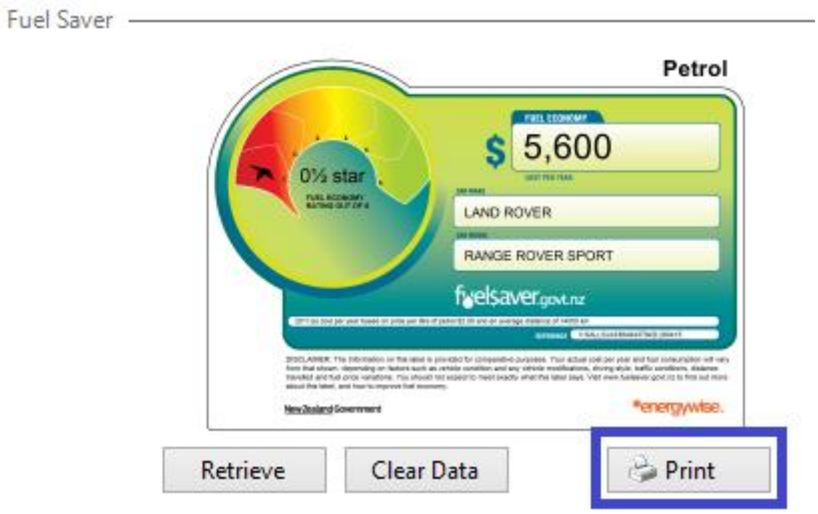
Under the administration tab you can control the selling price of the vehicle, there are four prices available to use.

1. Retail Price: This is the normal price of the vehicle, this can be a dollar amount or a special condition such as POA, Auction or Tender.
2. Wholesale Price: This is the price of the vehicle when sold to another dealer, only specialised advertisers will look at that price such as Dealerzone Wholesaler. Advertisers targeting the public such as Trade Me are not sent this figure.
3. Special Price: If a special price exists it will override the Retail Price, subject to export settings. It will also display as a discounted price on some of the promotional material, such as “Was $15,995, Now $14,995”.
4. On Road Costs: This is to indicate whether the vehicle has on road costs. The CIN card displays an all-inclusive figure as specified by law which includes any amount entered here.

Vehicle Tools Bar

There are some very useful tools within the vehicle starting with the ability to print the necessary documents and advertising material very easily, namely:

1. The Fuel Saver card, this can be found in the General tab

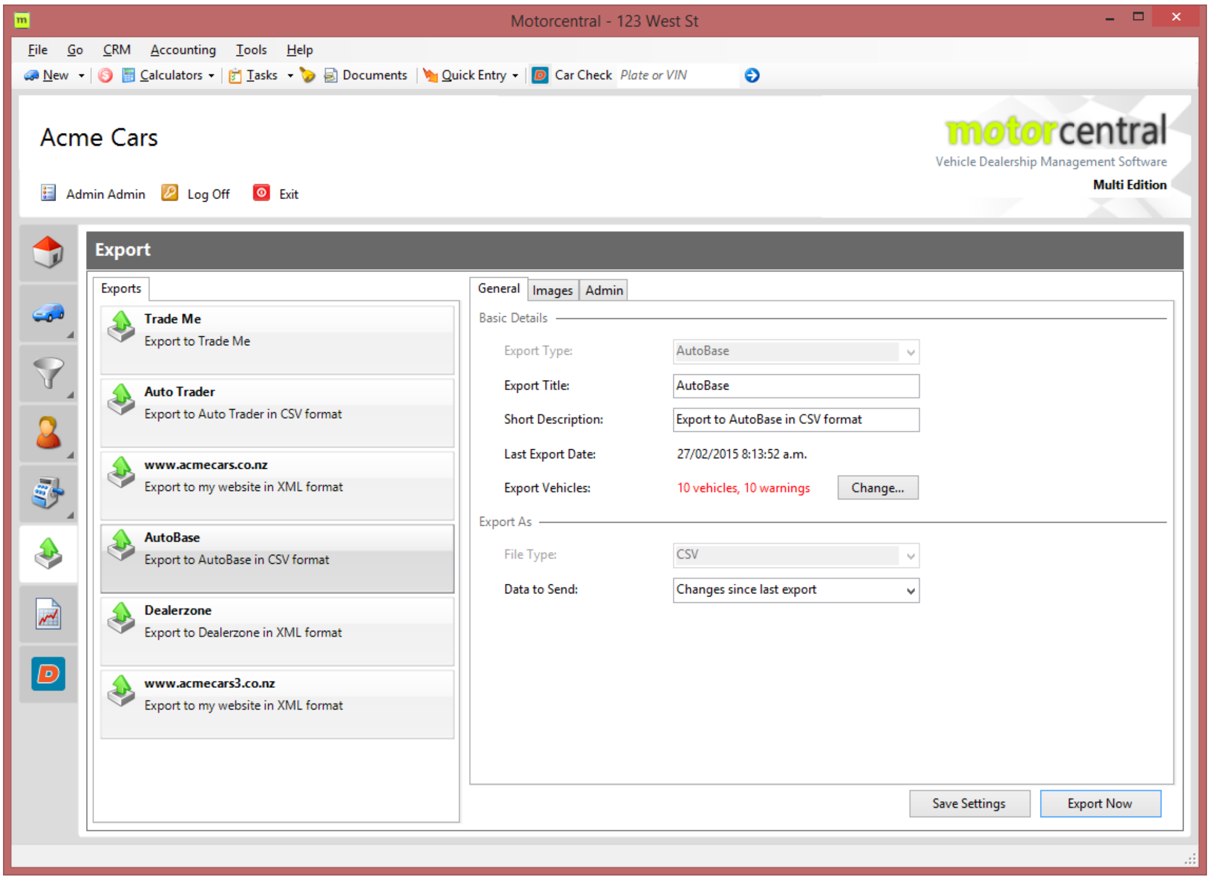


2. The CIN, this can be found in the Vehicle Tool Bar
3. The Summary Sheet, also referred to as the Window Card, this can be found in the Vehicle Tool Bar

The Vehicle Tool Bar has links to shortcuts and calculators and documents.

Exporting information to Websites

Once your stock information is ready you can export it to the various online advertisers such as Trade Me or your website under the Export Inbox.



Each export has its own set of settings so you can control the data that flows to your advertiser, this can be found under the Admin information tab.

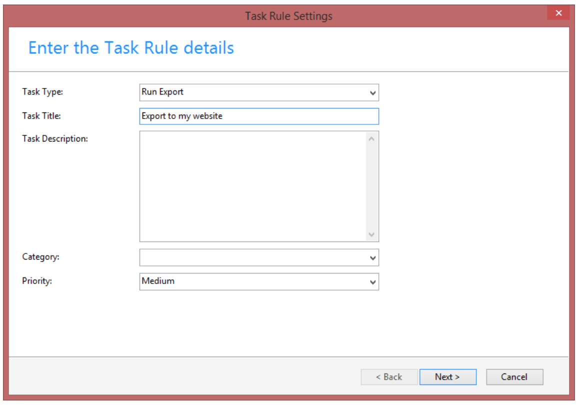
Trade Me has some special business rules, any violations of which can delay your vehicles from being available on the site. Motorcentral can detect and highlight most of those problems and will display warnings in red to bring them to your attention. Once you click on the Change button to the right of the warning text you will see a screen where you can drill in further and fix any issues found by Motorcentral.

Export on Demand

You can export stock information on demand by selecting the destination you want and clicking Export Now to send the information immediately.

Export Automatically on Schedule

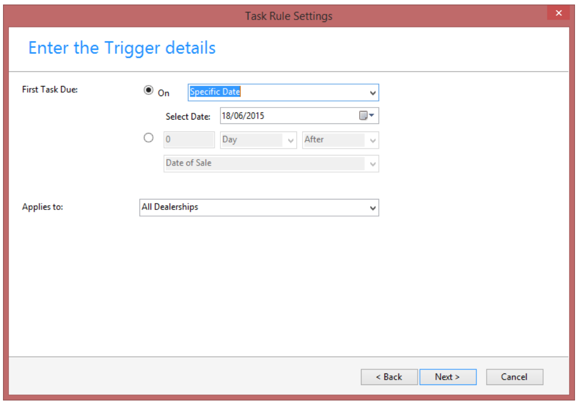
Exports can also be scheduled using Tools > Task Rules, follow the screens and make the appropriate selections, here are some hints.



Under Task Rule details

Task Type: Run Export

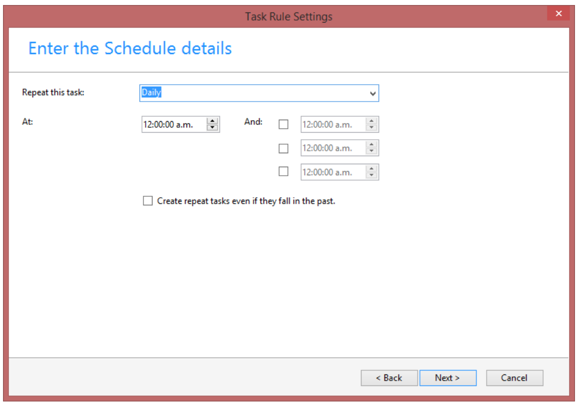
Task Title: Give the export a friendly name



Under Trigger details

First Task Due: On Specific Date

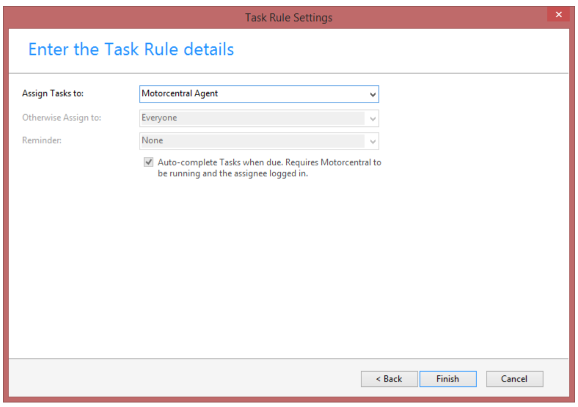
Date: select today's date



Under Schedule details

Repeat this task: Daily

At: Choose up to four times for each day



Under Task Rule details

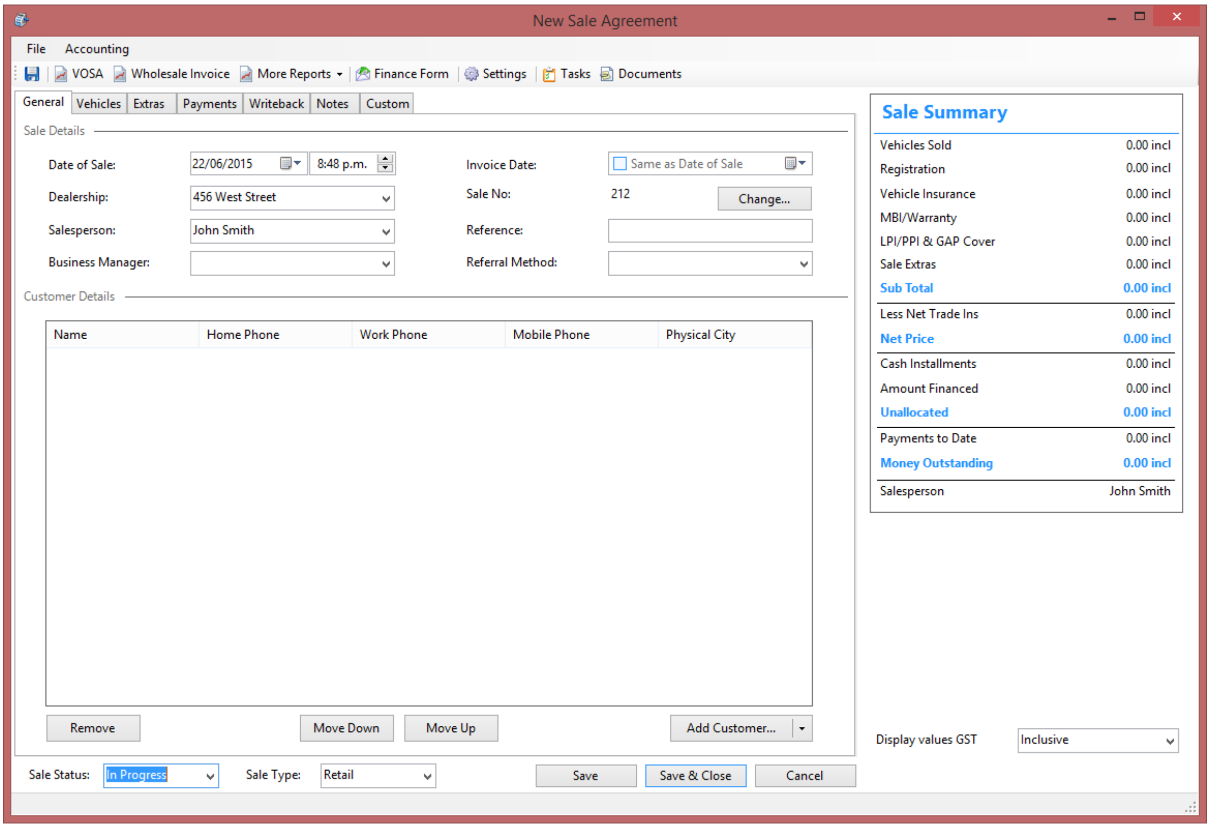
Assign Task to: Select Motorcentral Agent if you want the export to be completed automatically by Motorcentral server.

Or choose a specific person from list if you want that person to complete the export task, the task will not be completed unless that person is logged on to Motorcentral.

Selling a Vehicle

You can sell a vehicle in Motorcentral by adding it to a Sale Agreement, a Sale Agreement has all the details related to a sale including customer information, trade-ins, finance information, insurance information and other data needed to complete the sale.

The Sale has a Sale Summary highlighting all the key figures that make up the sale, you can find this on the right-hand side of the Sale Agreement form.



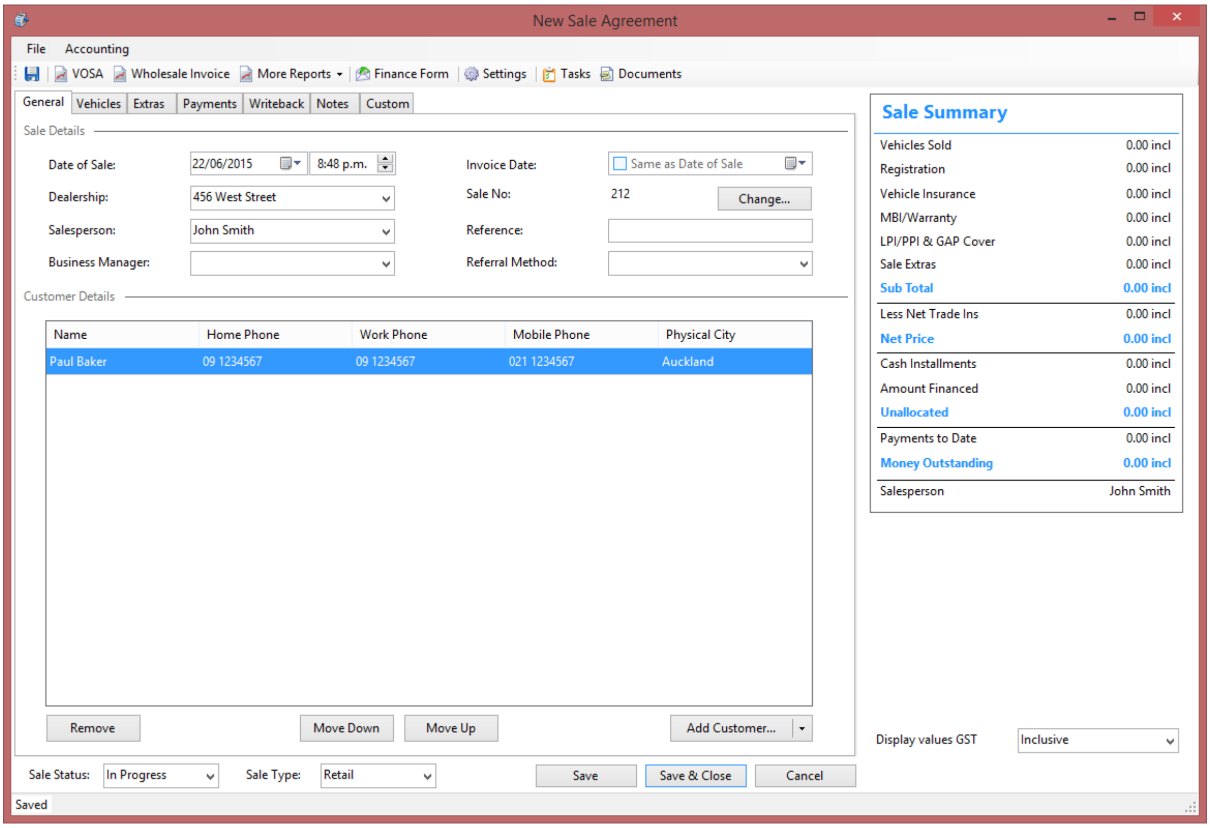
Each Sale Agreement has a Sale Status, show at the bottom of the Sale Agreement screen, this can be one of the following:

In Progress: The sale is not confirmed and the vehicle may still need to be advertised
Completed: The sale is confirmed but not all figures are finalised
Finalised: The sale is final in every single respect and the figures are ready to go to accounting

General Details and Customer information

A Sale Agreement can have one or more customers, you can add Existing Customers or new Customers using the Add Customer button. A New Customer can be an Individual or a Company. Once a new Customer is added Motorcentral will present you with a customer details for to fill out their details such as name, contact and address details.

If there is more than one customer on the Sale Agreement, you can move customers up or down to set their order.

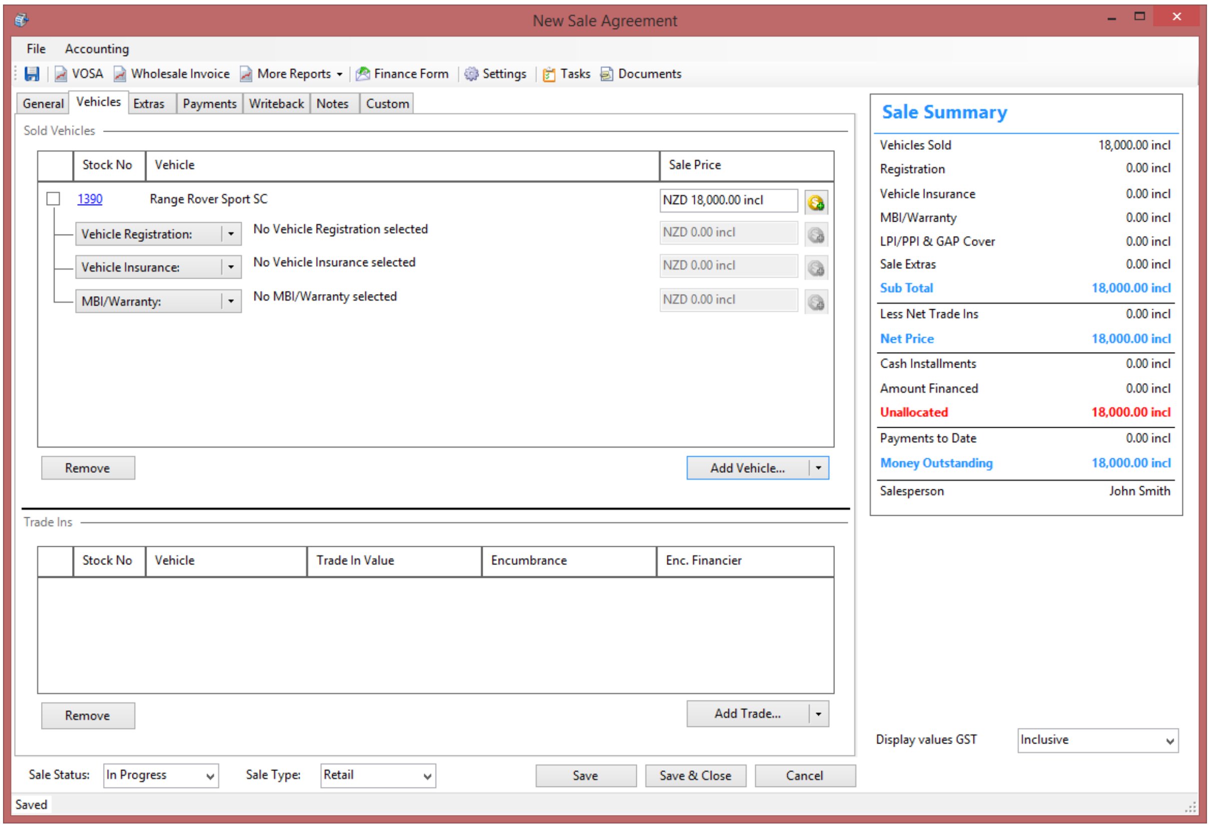


Sold Vehicles and Trade-Ins

In the Vehicles section you can add one or more vehicles to a Sale Agreement, each vehicle allows you to record vehicle registration, vehicle insurance or MBI/warranty against it.

These products can be managed using the Main Menu Bar under Tools > Products and the selecting the corresponding submenu item. MBI/warranty products of major insurance suppliers such as Auto Sure and Protecta can be created more easily using the Tools > Extensions menu option, thes switching on corresponding extension. Switching on an Extension will automatically create a set of products preprogramed in Motorcentral for that supplier.

Once this setup process is completed you can easily add all types of insurance products to a Sale Agreement including MBI/warranty, GAP and LPI/PPI.



If the Sale Agreement involves a trade-in you can add it to the Sale Agreement using the Add Trade button. This is identical to the process of adding a vehicle into stock. You can add multiple trade-ins to a Sale Agreement.

The Extras section is where you can enter products sold with the vehicle such as tow bars, click on the Add button to view your product library and add new products to the Sale Agreement. When adding a new product you can elect to add it to your product library for later use.

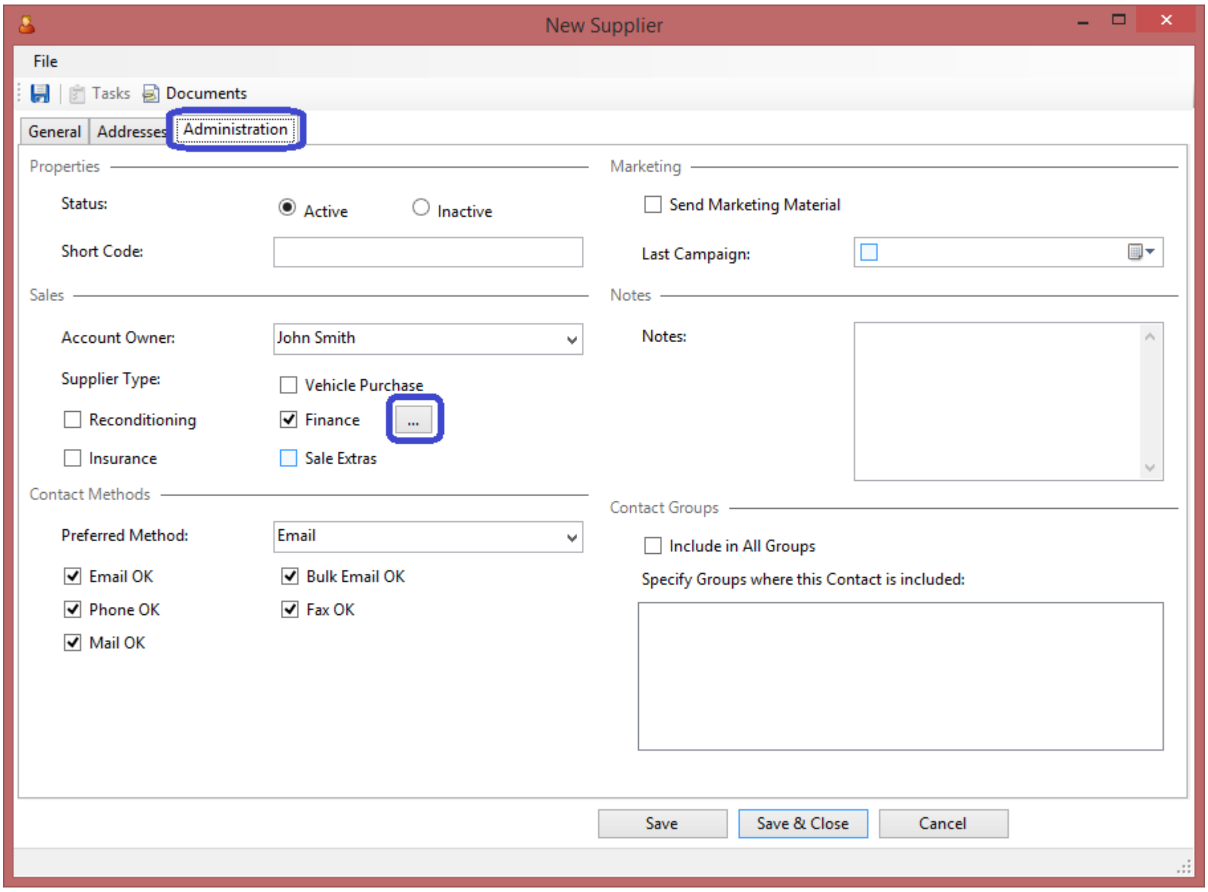
Under extras is where you can enter insurance information to be printed on the Vehicle Offer and Sale Agreement documents.

Finance Information

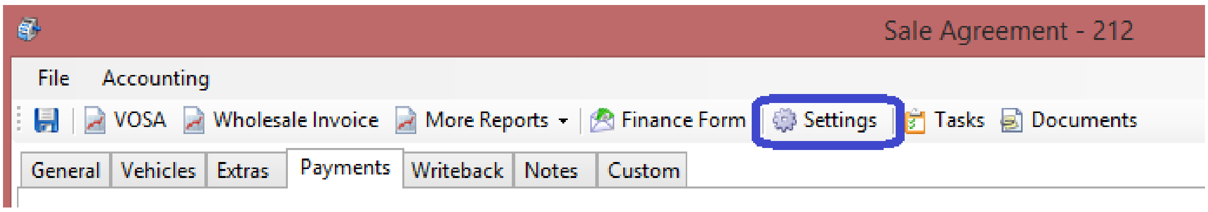
The Payments tab is where you tell Motorcentral how the customer is planning to pay for the vehicle, you can enter deposit, due on delivery and finance amounts. The Sale Summary on the right-hand side will show an Unallocated amount in red as long as the Sale Agreement does not balance.

Finance company information can also be preprogramed into Motorcentral so it can be used easily later in a Sale Agreement. To create a new finance company option click on the Add New option under the Financier drop down, Motorcentral will show a form to collect the information needed such as company name and contact details. The key part of this is the finance settings and rates, which can be found under the Administration tab next the Finance tick box.

Click on the button with ellipses and enter your buy and sell rates for finance. Once you set this up, selecting the finance company in a Sale Agreement will pull all those settings into the Sale Agreement, this will allow you to get more accurate profit reporting later.



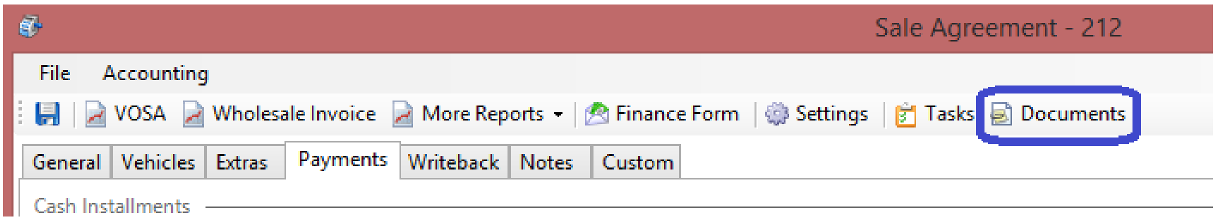
More finance and Insurance settings and figures in relation to this particular Sale Agreement can be found under the Sale Agreement Tool Bar option titled Settings.



Sale Tool Bar

Once a sale is filled out you can print a Vehicle Offer and Sale Agreement (“VOSA”) from the Sale Tool Bar, you can also print a Wholesale Invoice if the vehicle has been sold to another trader.

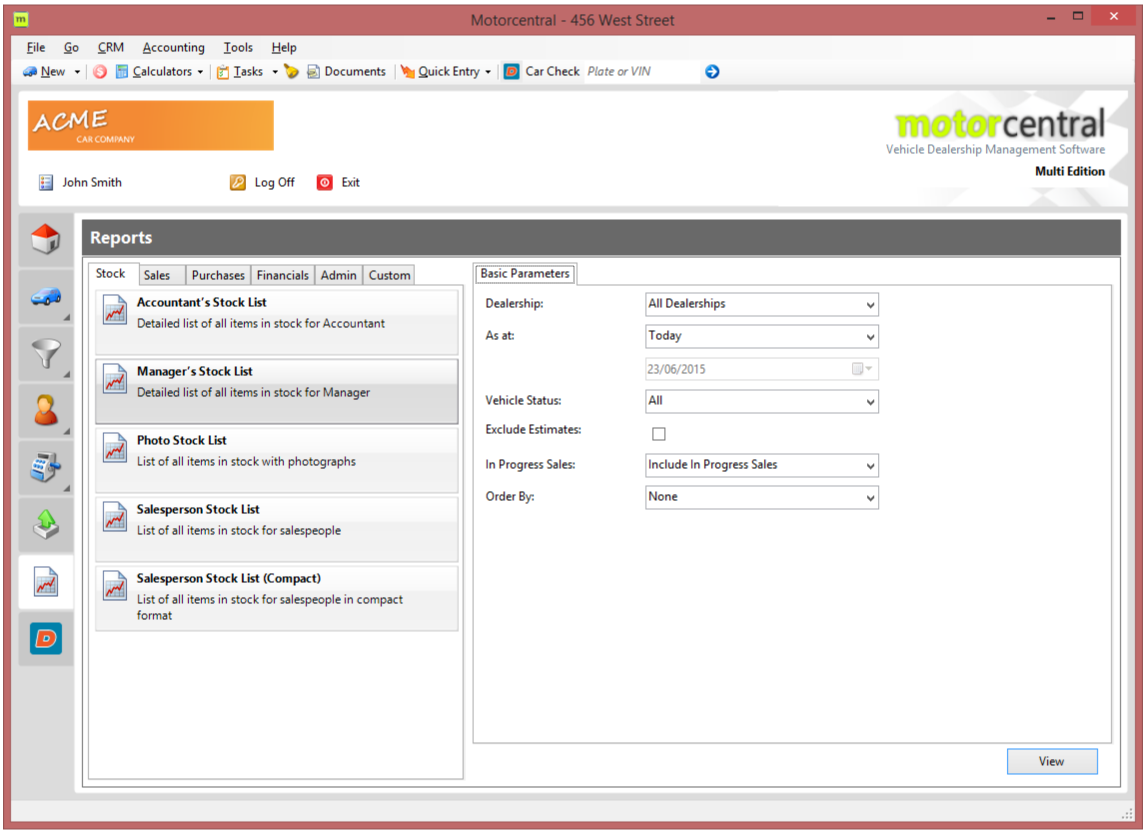
Motorcentral will print two copies of the VOSA, one titled TRADERS ORIGINAL, in color, and the other PURCHASERS COPY, in black. Print, sign the documents then scan them back into the Sale Documents area.



Reports

Motorcentral has a large set of reports covering stock, sales and much more. To access reports click on the Report Inbox then use the tabs to navigate to the report area you want and finally click on the report name.

Most reports have parameters which you can choose to filter, group or order data. Adjust those parameters to suit your purpose then click on the View button on the bottom-right hand-side to launch the report.



Some key reports include:

- Stock > Manager's Stock List: Shows a list of stock with information required by managers
- Stock > Salesperson Stock List: Shows a list of stock with information required by salespeople
- Financials > Manager's Sales Report (Vehicles): Shows vehicle sales
- Financials > Money Outstanding: Displays list of unpaid sales

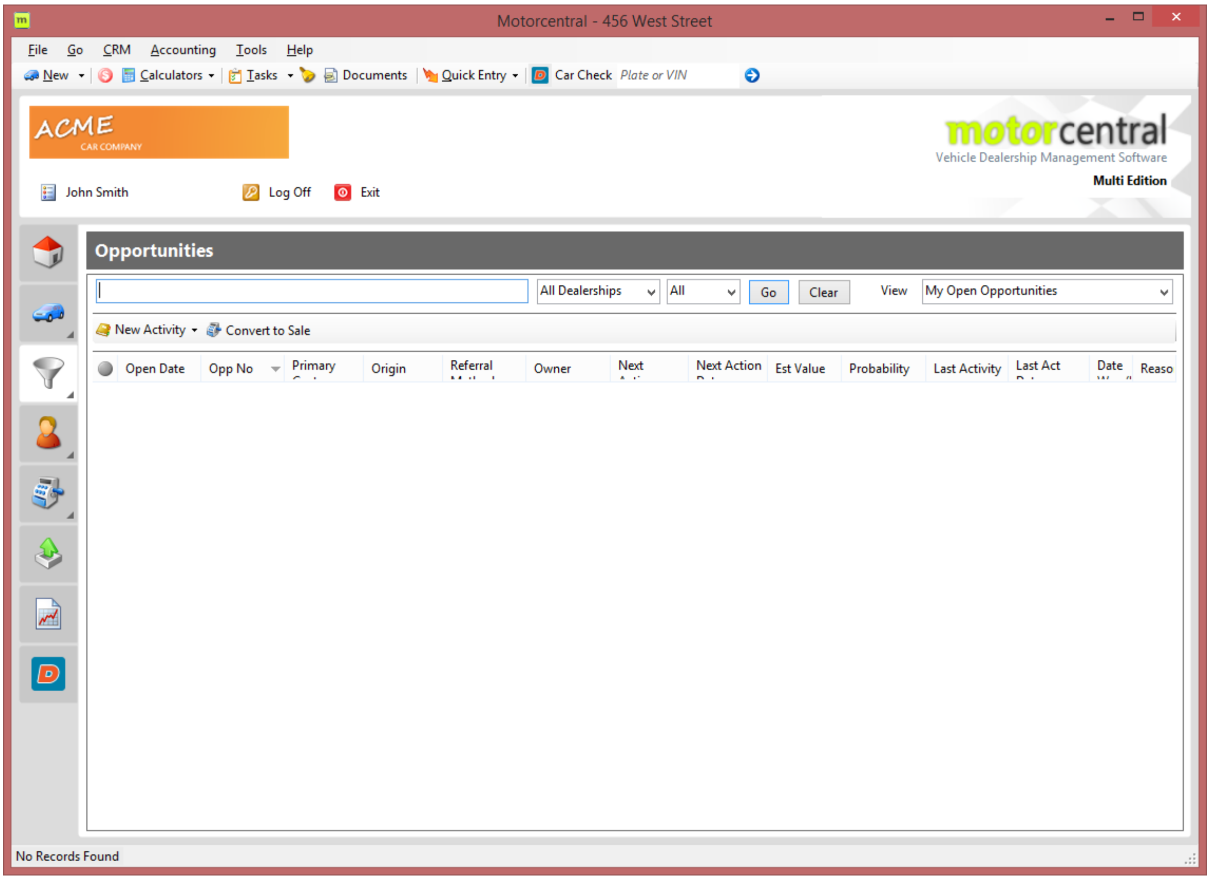
  Financials > Vehicle Expenses Report: Used to find and group expenses recorded by the dealership
- Admin > Vehicle Missing Information: Display vehicles with missing information

Custom Reports

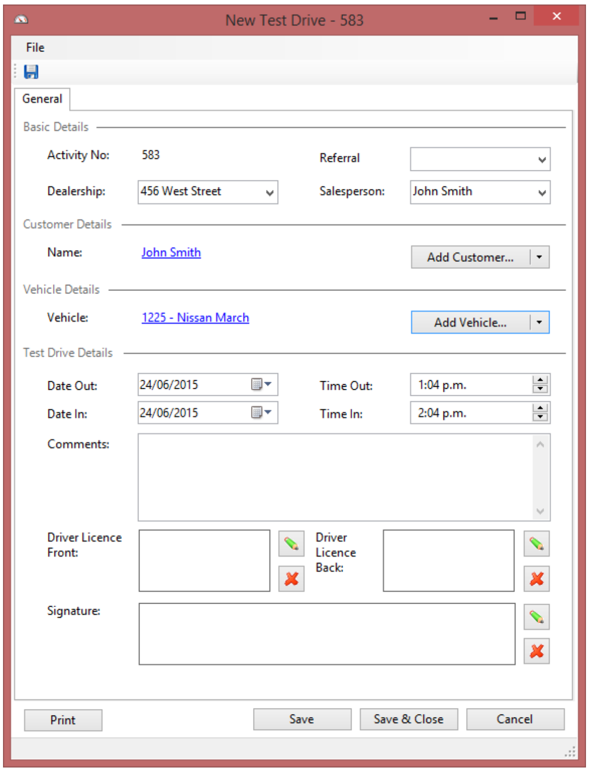
In addition to these reports our team can build custom reports specifically for your need and purpose, we can pretty much build anything you can imagine. There is an hourly development charge to cover the cost of doing custom work.

Overview of Opportunities

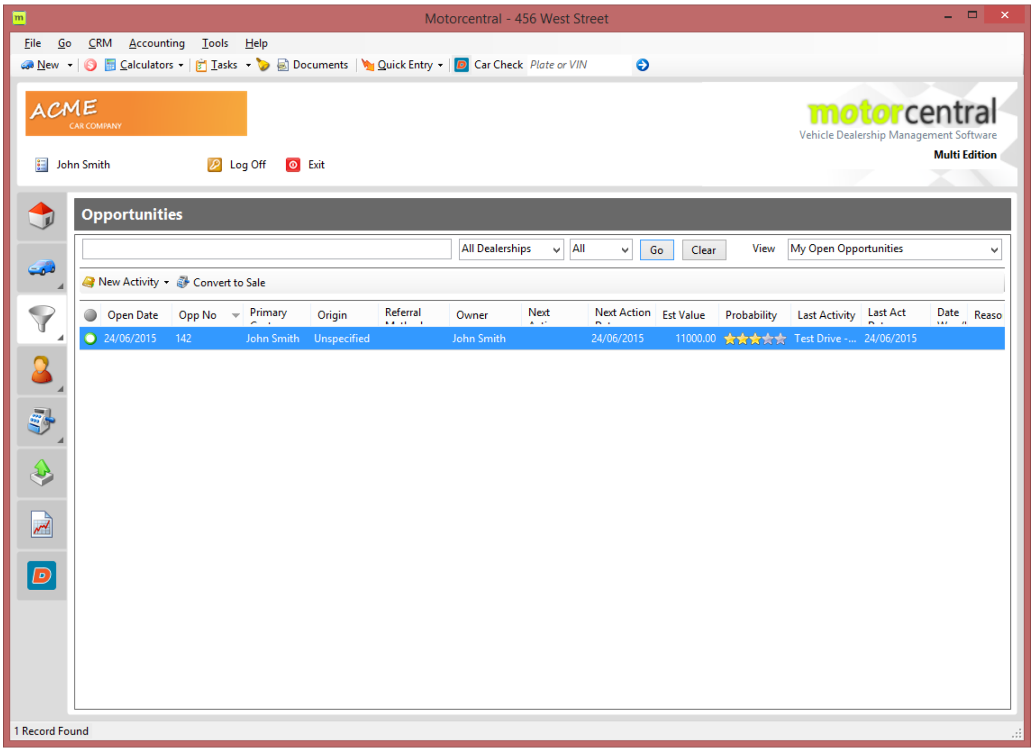
The Opportunity Inbox is where you can record pre-sale activities and manage your sales funnel. Motorcentral defines an opportunity as the group of activities involved in selling a vehicle to a particular customer, so an opportunity may involve multiple activities such as enquiries, test drives and quotes.



One of the simplest ways to create an opportunity in Motorcentral is to create an activity, such as a test drive. You can do that from the Opportunity Tool Bar > New Activity > Test Drive. There you can add a customer, a vehicle and photos of the driver license. You can then use the Print button on the bottom-left hand-side to print a test drive disclaimer form for the customer to sign.

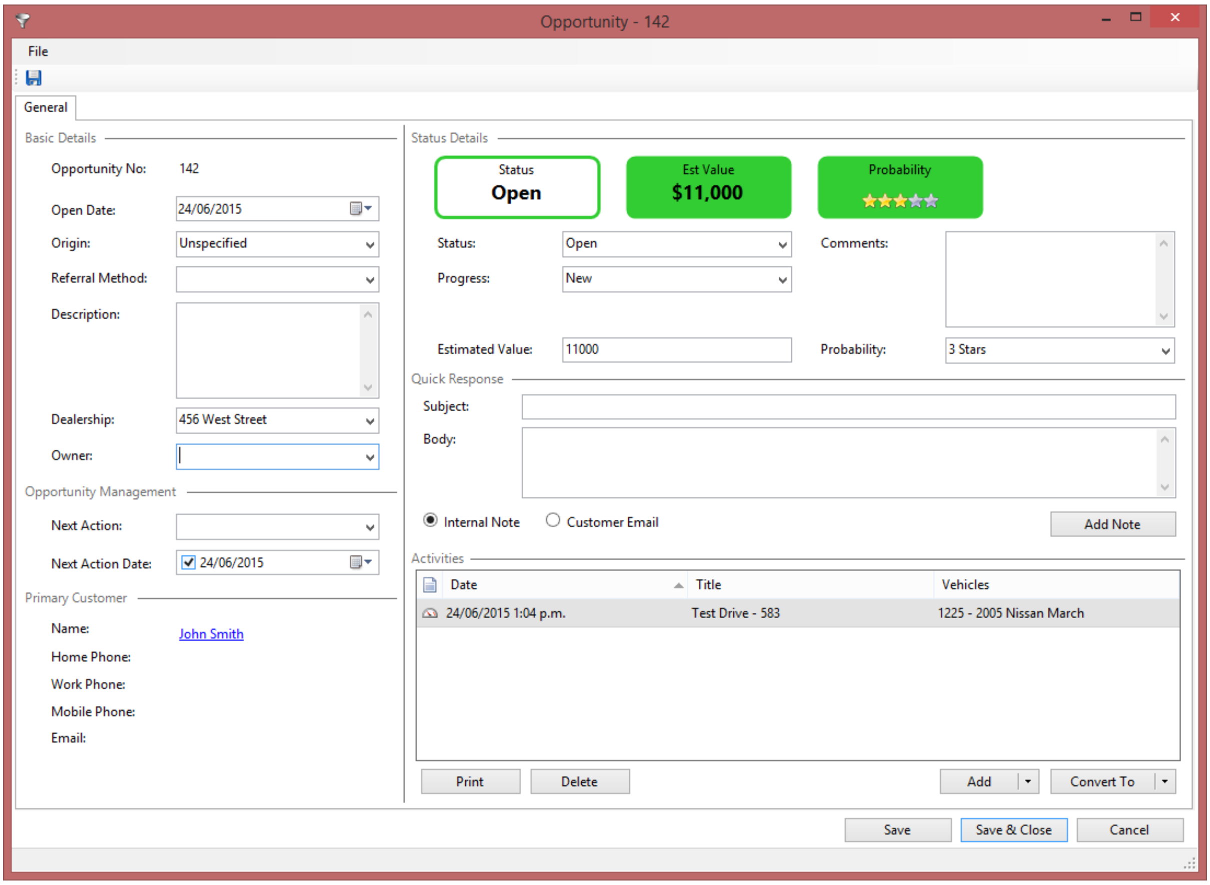


Once done you can Save & Close the Test Drive, you will see that Motorcentral has created an opportunity around that test drive.



You can open the opportunity and continue to work with it. Things you can do include:

- Maintaining the main attributes of the opportunity such as date and which salesperson it is assigned to.
- Customer infromation.
- The Status of the opportunity and its value
- Make quick comments or send a quick email to the customer, which will be recorded as an activity against the opportunity
- Add a new activity



Types of Activities

Motorcentral allows the recording of the following types of activities:

- Enquiry
- Test Drive
- Price My Trade
- Feedback
- Finance Calculator
- Quote
- Finance Application
- Sale Agreement
- Follow Up
- Note
- Incoming Email
- Outgoing Email

Each activity collects the relevant information but all have some things in common such as the ability to Print a summary of the activity and how they integrate into the opportunity workflow.

Opportunity Reports

Motorcentral has some reports in relation to activities and opportunities, including:

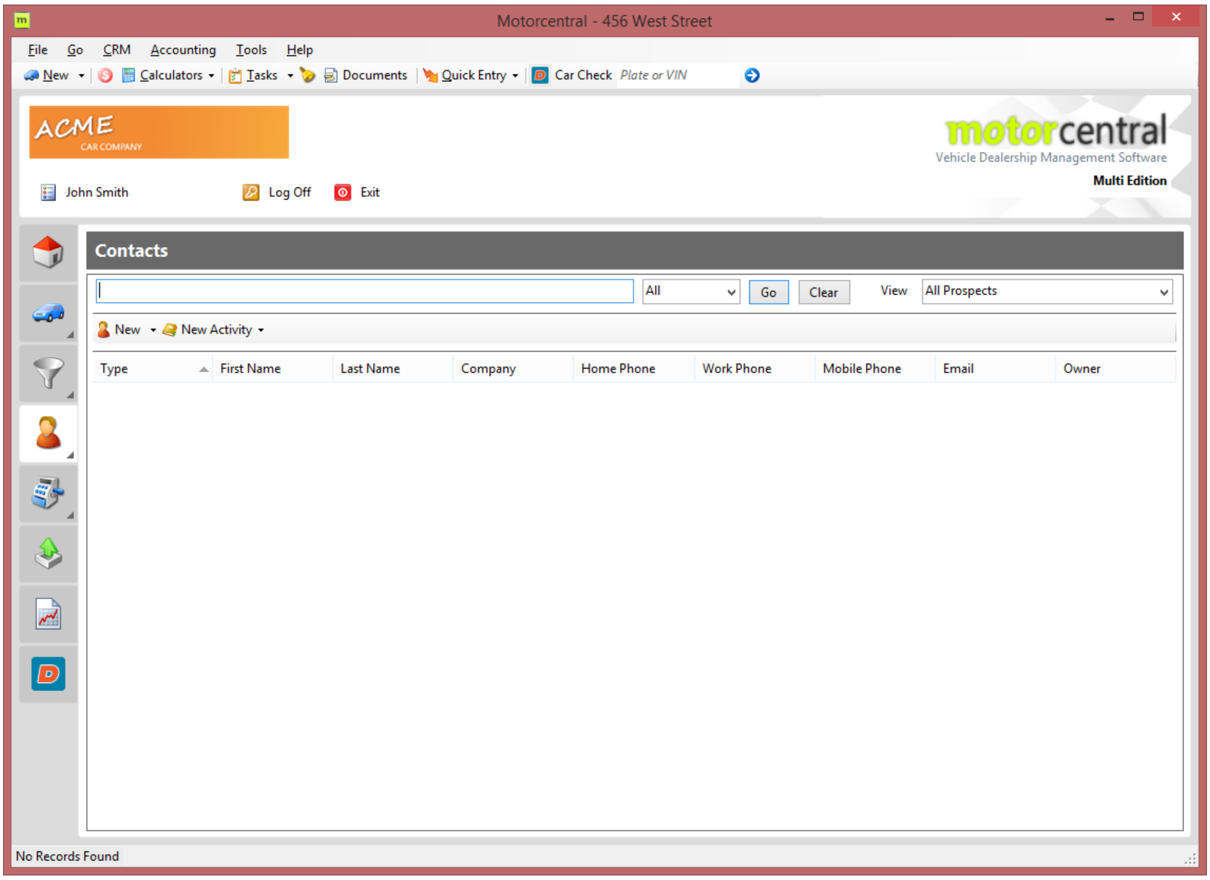
- Sales > Open Opportunities: Shows a list of open opportunities to help manage the day-to-day follow up process
- Sales > Opportunity Management: Shows summary of activities and opportunities over a certain period

Other Highlights

There are many more features in Motorcentral, too many to cover in one document but here are some key areas and features.

Address Book

The Contacts Inbox is basically an address book, here you can find customers and suppliers where you can maintain their basic details or navigate into related sales and opportunities.



Purchase Orders

Motorcentral has a Purchase Order and Purchase Invoice system to help you manage supplier orders and estimated costs. You can find this in the Main Tool Bar, under the Accounting menu.

Print Advertising

Motorcentral can also help you build and send print advertising information to magazines quickly and easily. You simply setup create an Advert Publication using Tools > Advert Publications, then create your day-to-day adverts using CRM > Adverts.

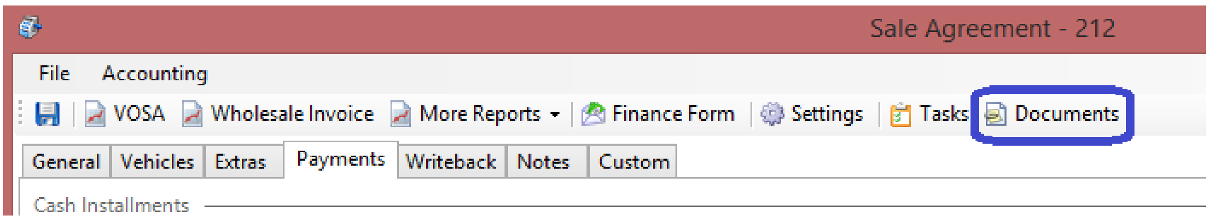
We can also build custom advert layouts for a small fee.

After Sale Tasks

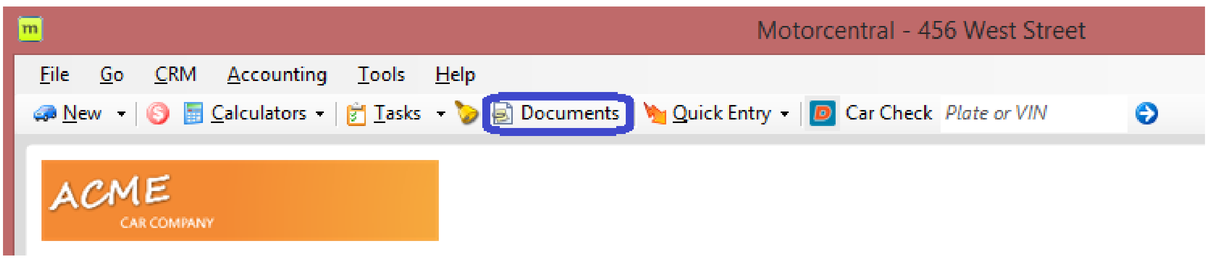
Motorcentral can help you organise after sales reminders, letters of emails. You can create Letter or Email templates under the CRM menu, then set the rules under Tools > Task Rules. Tasks will then be created automatically and reminders will show up accordingly.

Documents

Motorcentral has a cloud-based document storage system which you can access from any location. You can record documents against vehicles, sales, customers and suppliers. Just open the appropriate item and look for the Documents tool in the Tool Bar.



There is also a general document library in the Main Tool Bar where you can store frequently needed documents and templates.



Accounting

Motorcentral can send purchase and sale information to MYOB and Xero. For More information please refer to:

http://support.motorcentral.co.nz/entries/74808045-PDF-Introduction-to-the-accounting-export-module-for-Xero-by-file-export

http://support.motorcentral.co.nz/entries/82573745-PDF-Introduction-to-the-accounting-export-module-for-Xero-by-API

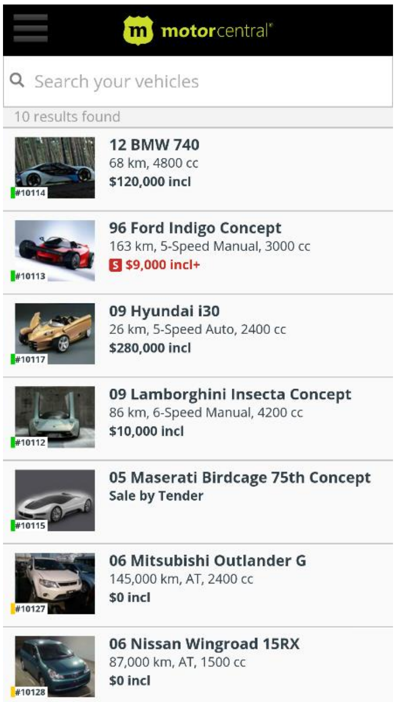
Users and Security

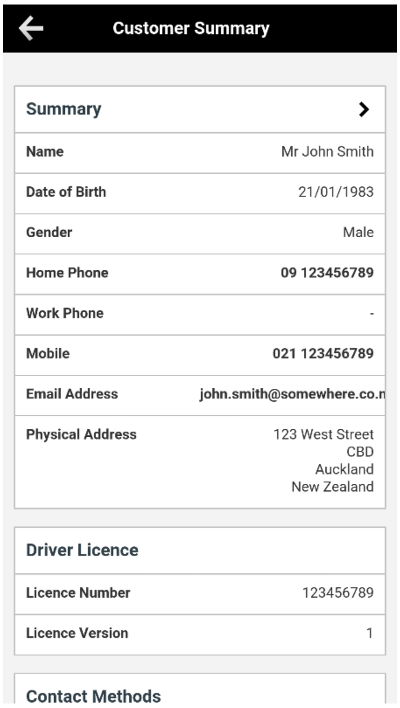
You can control who can access Motorcentral and what information they can see or edit. To manage your system security go to the the Main Menu Bar and click on Tools > Users.

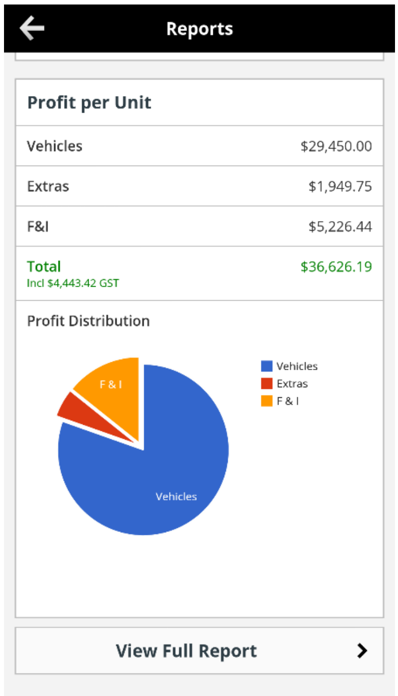
Motorcentral Mobile

Motorcentral comes with a mobile phone interface for performing key tasks on the run, this includes:

- Viewing detailed stock information including expenses
- Editing selected stock details such as price
- Accessing the address book with handy shortcuts to email or phone a contact using your phone







- Viewing sales and VOSA
- Triggering stock export to your website, Trade Me and other advertising sites
- Recording activities such as Enquiry, Test Drive and Price My Trade
- Creating Purchase Orders
- Viewing key stock and sales reports

Motorcentral Online Services

Motorcentral has more services to you lower your costs and run your dealership more efficiently, here are some of the key services on offer:

- Car Check: LINK TO OUR NEW WEBSITE
- Auto Attendant: LINK TO OUR NEW WEBSITE
- Websites: LINK TO OUR NEW WEBSITE

Support

We are always here to help, to get support please use one of the following:

- Email us on support@motorcentral.co.n
- Call us on 0800 MCENTR (623 687)
- Find out more information on our support website http://support.motorcentral.co.nz/home
- See new tips, tricks and news on our Facebook page https://www.facebook.com/motorcentral