Dragon2000

Vehicle Sales Training Manual

Contents

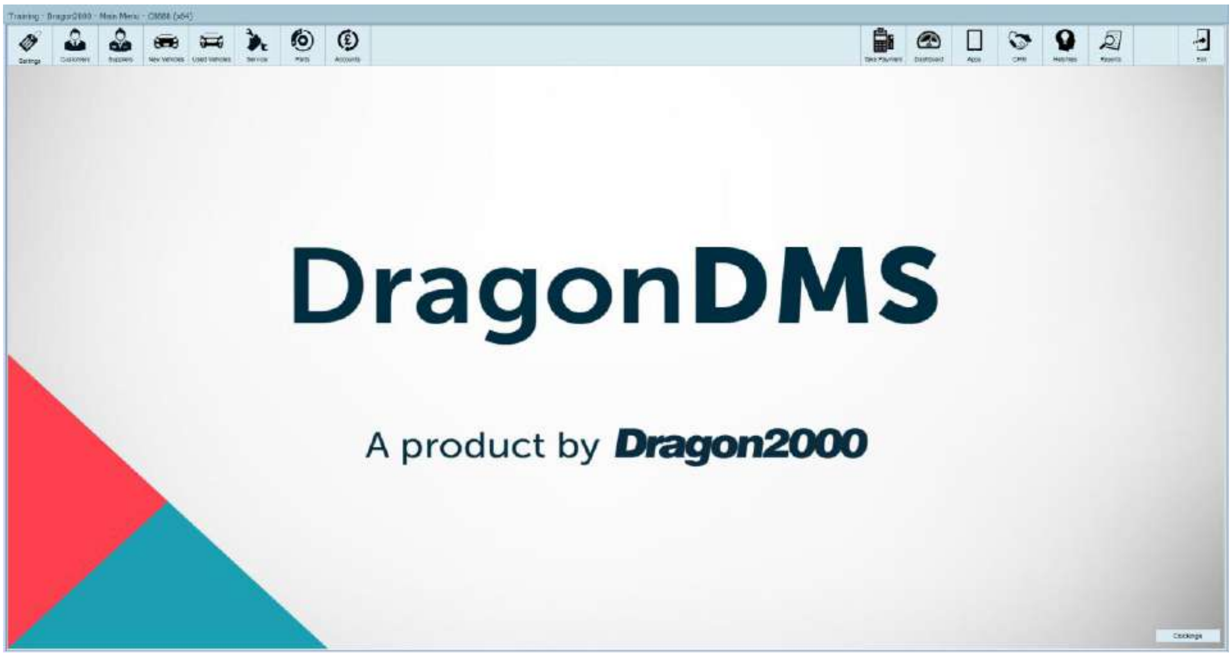
Getting Started

Start DragonDMS from either the Desktop shortcut or the Programs Menu.

The Login screen will appear with the username of the last user. If the last user was not you, you must enter your username and password, then click Login or press the Enter key if you prefer. All passwords are case sensitive.

Main Menu Overview

Once you have successfully logged in the Main Menu will appear.



You will see all of the DragonDMS module icons; however you will only be able to access the modules that have been enabled on your user account.

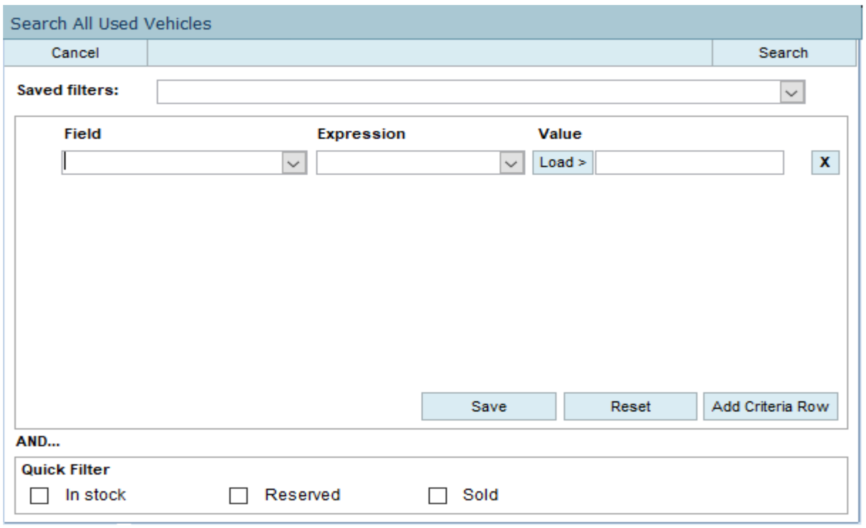
Used Vehicle Module

At the top of the Vehicle Sales Menu are the Action Tabs. From left to right they are:

Create Vehicle	Add new vehicle records.
Valuations	AutoTrader & Vehicle CAP Valuation tool.
Advertising	A tool to mark vehicle to be submitted to your online advertisers.
Provenance Check	HPI Check Report or MotorCheck Report, an additional subscription is required for this service.
Templates	Useful when the same costs and extras are applied to vehicles in stock.
Utilities	Delete and revive vehicle stock records, access rights are required to use this feature.
Finance Calculator	Allows you to easily calculate representative finance examples.
Extras	List of saved Extra items that can be added to vehicle sales.

The Information Summary appears below the Action Tabs. It groups vehicles by Vehicles in Stock, Reserved Stock, Pending Part Exchanges, Vehicles Sold, Advertising, Supplementary Invoices and Job Card Requests. Click on a group to view a list of the Vehicle Records.

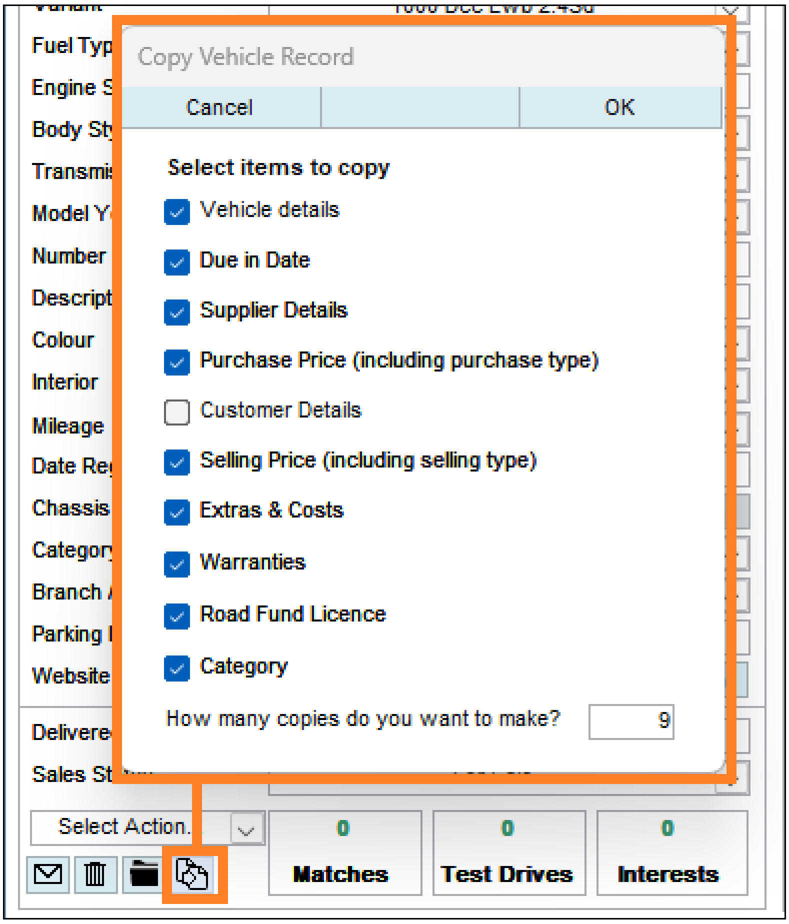
Search All gives you the option to create a custom search.



New Vehicle Module

This manual will focus on the Used Vehicle Module. The functionality and layout of the New Vehicle Module is very similar to the Used Vehicle Module, with the following subtle differences:-

- The list of New Vehicles displays a Chassis Number column in place of a Registration column.
- All vehicles added to the New Vehicle Module will automatically be set as VAT qualifying.
- The purchase and sales groups will default to New and will use different nominal codes to those used on Used Vehicles. To view or edit the purchase and sales groups go to Settings > Vehicle Sales > Vehicle Groups.
- A First Registration Fee is applied as standard to all New Vehicle sales. The value of the First Registration Fee can be edited by going to Settings > Vehicle Sales > Defaults > First Reg Fee.
- Copy tool, this allows you to create duplicate vehicle records with the option to choose which elements of the original vehicle record you want to copy.



Customising Your Data

Searching

If you want to filter the list of vehicles you can enter your search criteria into the search box which is above the vehicle list. Multiple search criteria can be added, just make sure you have a space between each word.

To remove the search criteria click on the Clear button to the right of the search box.

Sorting

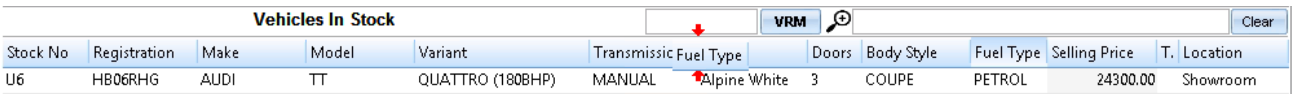
The vehicle list can easily be sorted and ordered to help you organise your vehicles. Decide which column you want to sort by, click on the column heading to sort the list Z to A, click on the column heading again to sort A to Z. If the column has numerical data it will sort highest to lowest first and then lowest to highest.

Re-Ordering

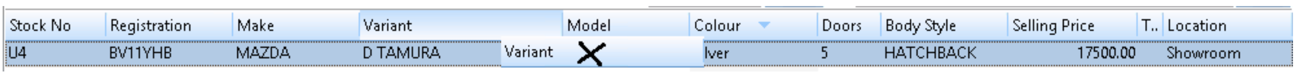
The order of the columns can be changed by dragging and dropping the column headings, allowing you to get the data the way you want it.

Click on a column heading and drag left or right until you see two red arrows where you want the column to be, and then drop the column heading.

> **Dragging and Dropping**
> To 'drag' click and hold the left mouse button and at the same time move the mouse, when you get to the position you want you can 'drop' by releasing the left mouse button.

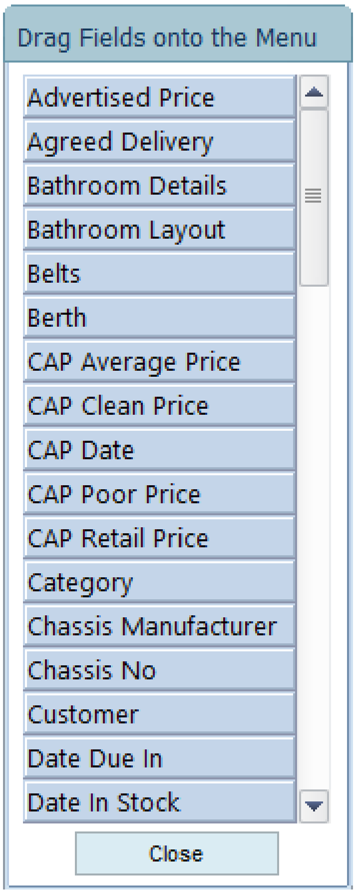


If you drag a column heading up or down you will see a black cross, the column of data will be removed when you drop the column heading.



Additional Information

There are many more fields of Vehicle Record information that can be viewed on the screen. Right click on any of the column headings and a list will appear showing the column headings available.



Drag and drop these column headings to add them to your vehicle list.

After you have added or removed columns the new list layout will be saved. Layouts are individual to each user so different employees can see different column layouts.

Creating a Vehicle Record

There are two options for adding vehicles to stock, the Advanced Vehicle Creation or the Standard Vehicle Creation.

Advanced Vehicle Creation – this option is ideal if you are looking to add a vehicle into stock and get it advertised straightaway. *This option is only available for Used Vehicles.*

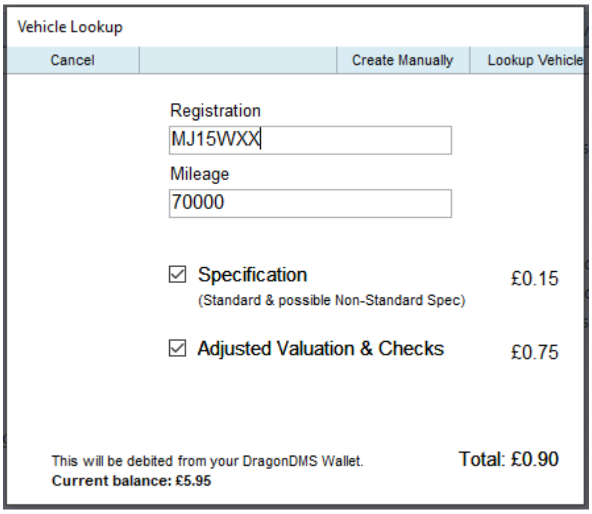
Standard Vehicle Creation – this option is ideal if you are just looking to create a new stock record in your DMS.

You can change the vehicle creation option in Settings > Vehicle Sales > Defaults > Creation> Vehicle Creation Wizard.

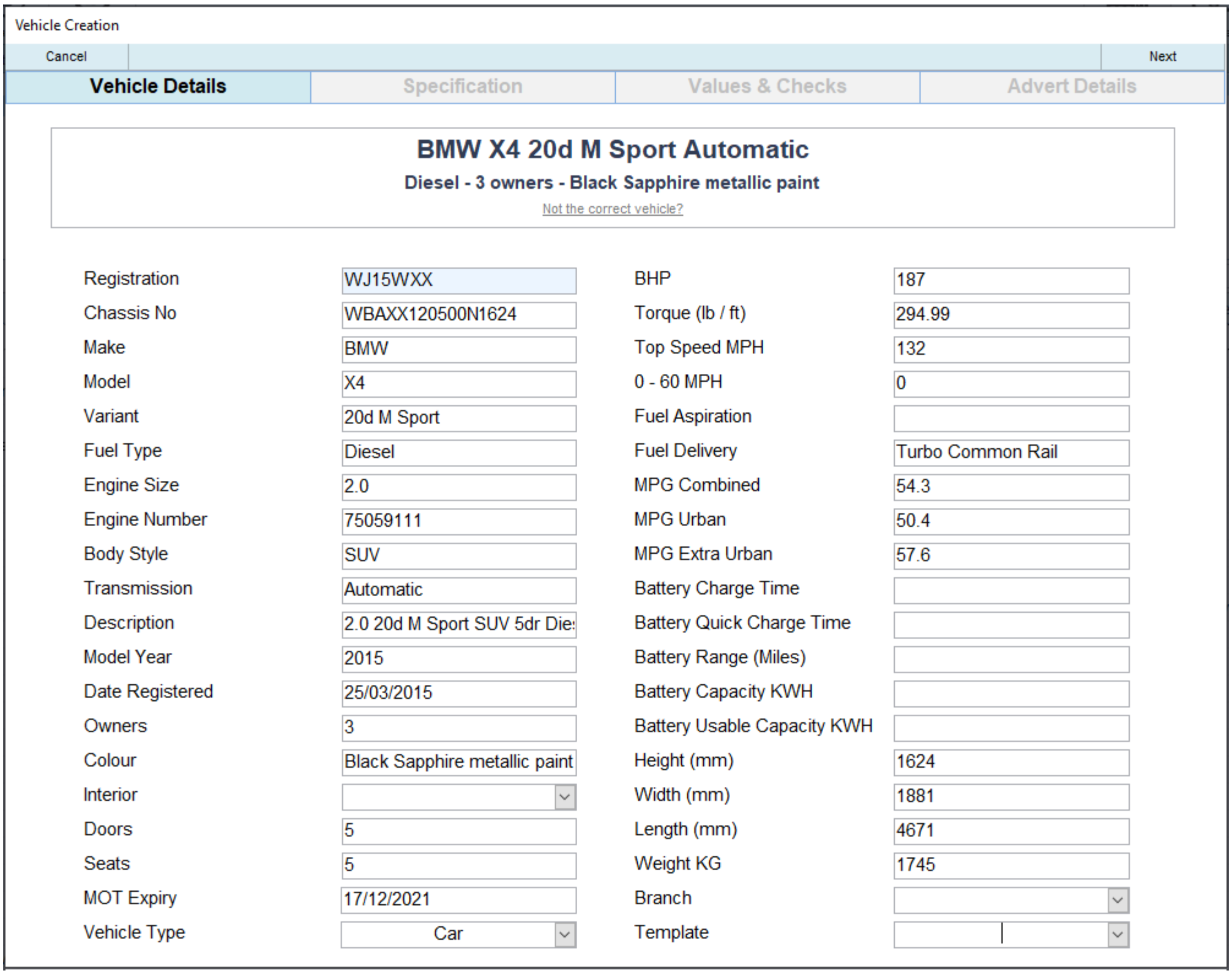
In this manual we will look at the Advanced Vehicle Creation. Click on the Create Vehicle action tab, enter the vehicle registration and mileage then decide if you want to use either of the additional optional lookups, *you will need money in your cash wallet to be able to use these features*.
***For Dealers that have linked their DragonDMS to their AutoTrader DID via the live feed, these lookups have no charge.**

Specification
This returns a list of standard vehicle specification and a list of possible non-standard specification.

Valuation and Checks
This data is supplied by AutoTrader and returns Valuations, Metrics and Checks



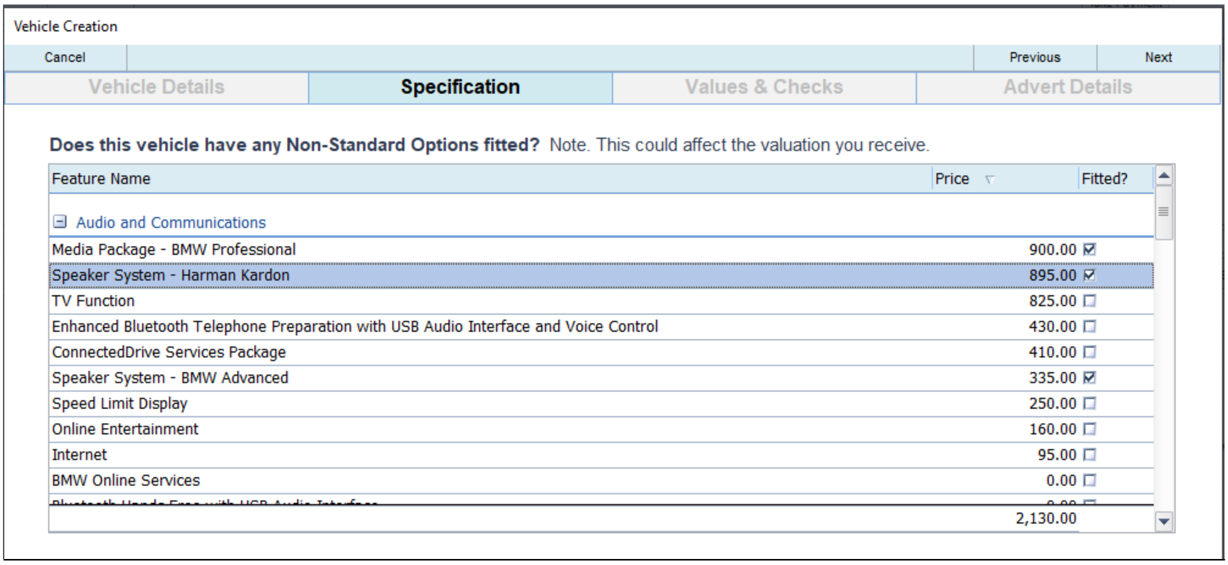
Click on Lookup Vehicle (this lookup will use one of your inclusive VRM lookups) and will return the vehicle details.



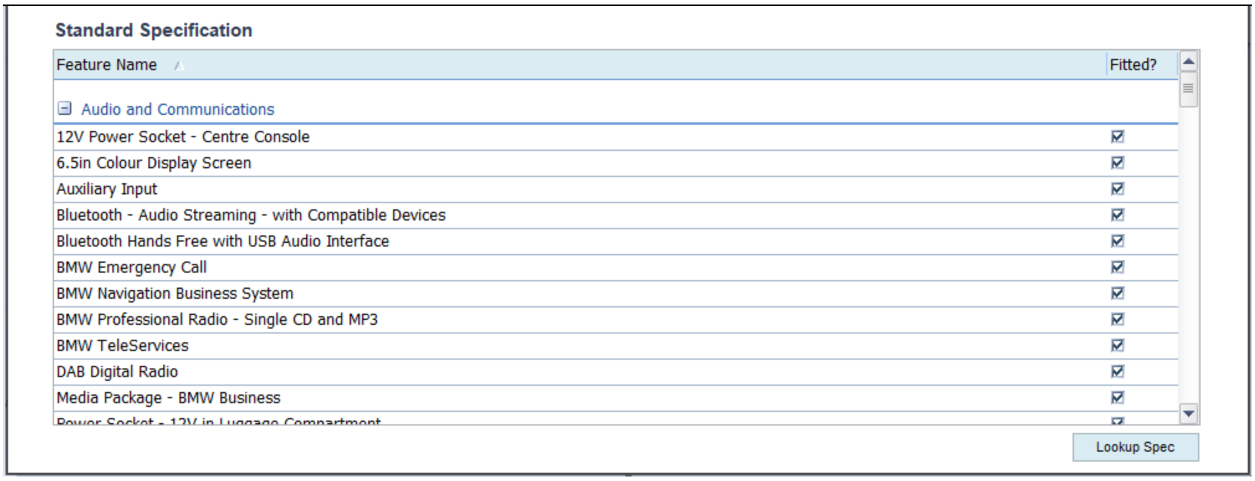
These fields are returned by the VRM lookup and can be editted if required.

Click Next to view the Specification.

If the Specification lookup was ticked you will see on this screen a list of possible non standard options the vehicle may have. Tick the options that apply to the vehicle.



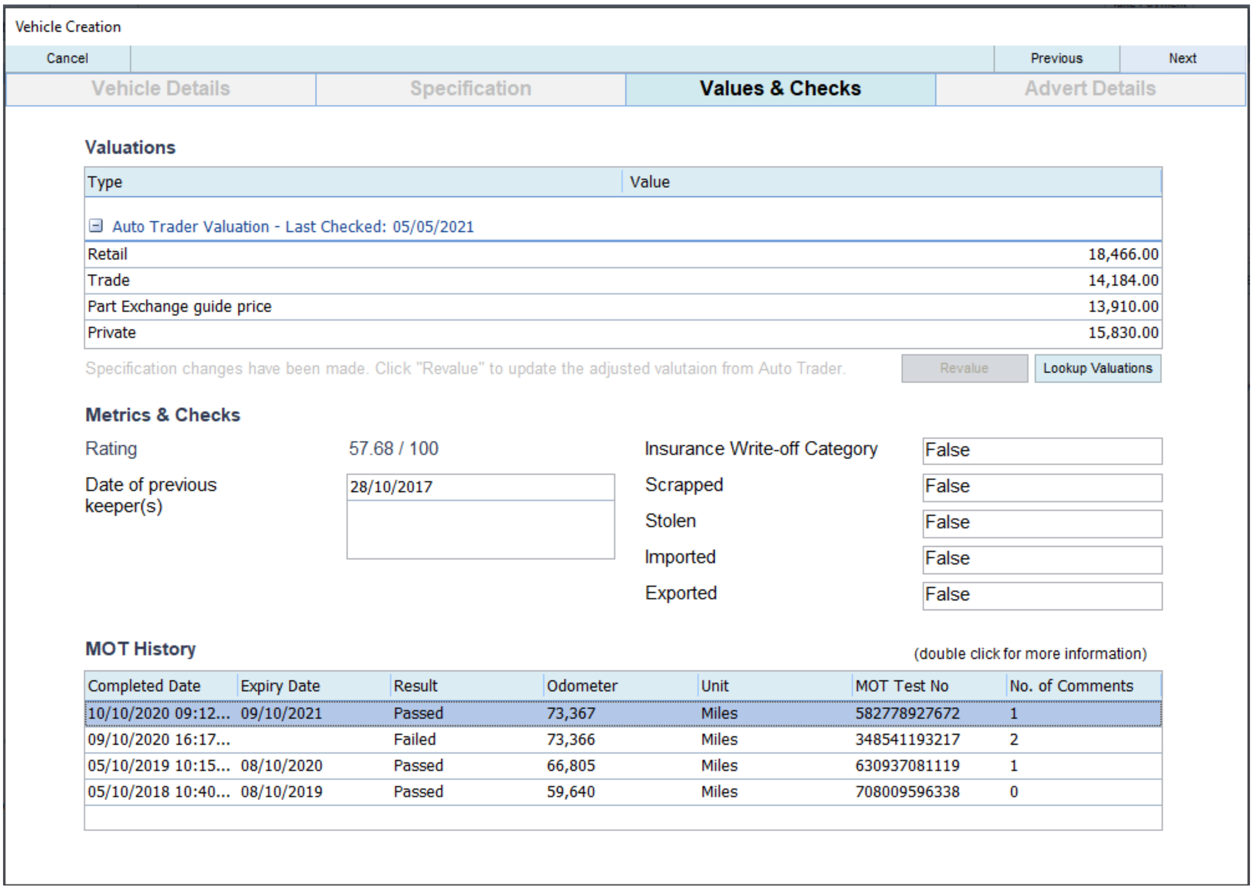
A list of standard specification will be listed with all items ticked, check that they all still apply to this vehicle and untick as required.



Click Next to view the Values & Checks.

If the Valuation lookup was ticked you will see AutoTrader valuation figures, Metrics and checks.

The MOT History is part of the standard VRM lookup. Double clicking on the No. of comments will show details of all comments.



Click Next to view the Advert Details.

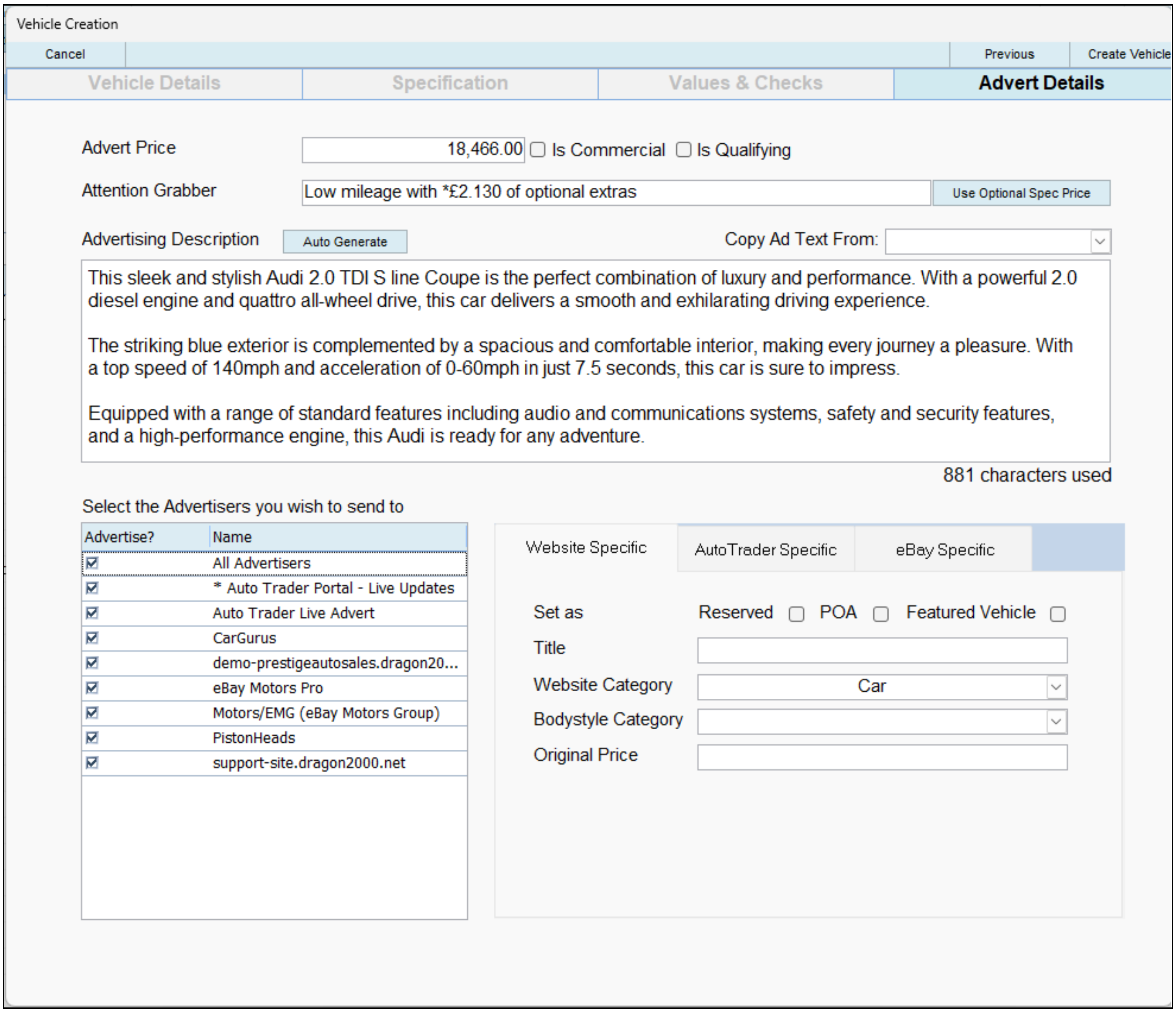
If the Valuation lookup was used, the AutoTrader retail price will be used as the Advert Price, this can be edited if required.

An attention grabber can be added, if you wish to put some text about the value of the optional spec on the vehicle click the button to the right.

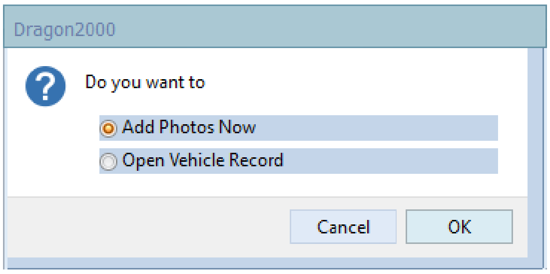
The Advertising Description can be preloaded with default text – you can add this in Settings > Vehicle Sales > Defaults > Creation > Default Adverting Text

Select the advertisers* that you wish to send this vehicle to, AutoTrader and Ebay have additional advertising options that you can add using the tabs on the right hand side.

*the advertising feeds need to be enabled for your DMS before the feed is live – please contact support@dragon2000.co.uk if you wish to enable an advertising feed.

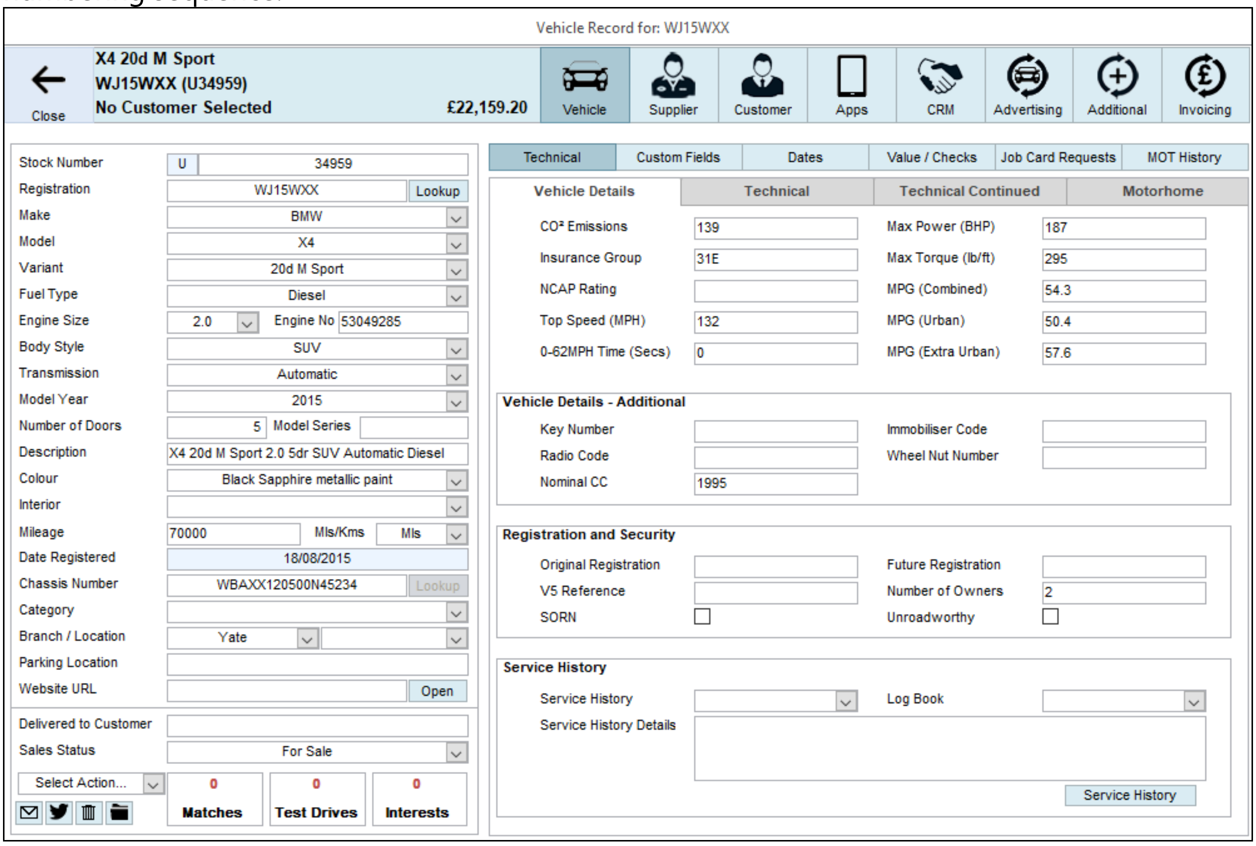


Click Create Vehicle select Add photos or open vehicle record.

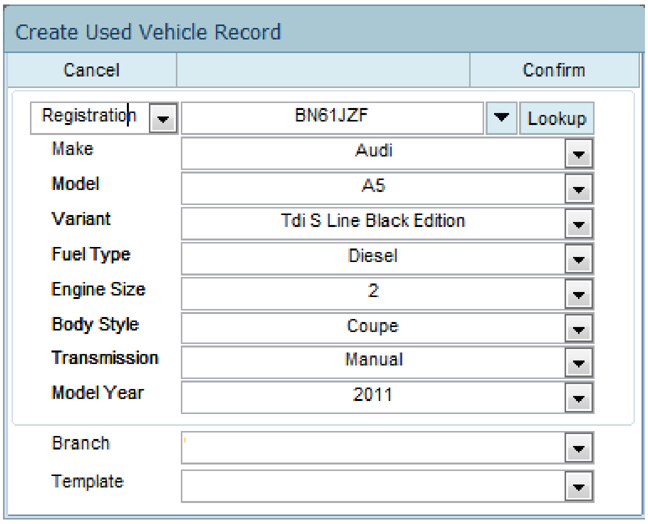


If you want the vehicle in your website, straightaway choose the Photos option and upload your photos. Otherwise choose Open vehicle record.

DragonDMS will allocate the next available stock number, but you are free to enter any number you like. You cannot create the same stock number twice and you cannot use letters in the numbering sequence.



If you are adding the vehicle using the Standard Vehicle Creation, clicking on Create Vehicle will show you this screen.

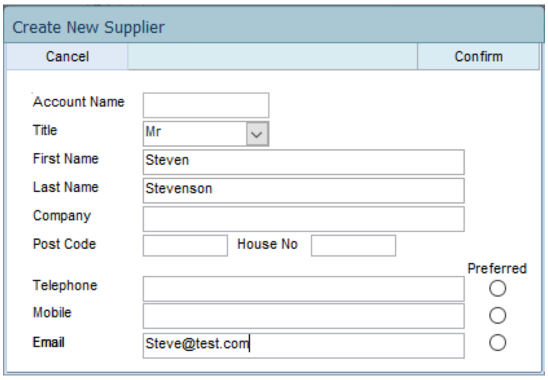


Enter the vehicle registration and click Lookup, then confirm to open the vehicle record.

Recording the Purchase Details

Add Supplier Details

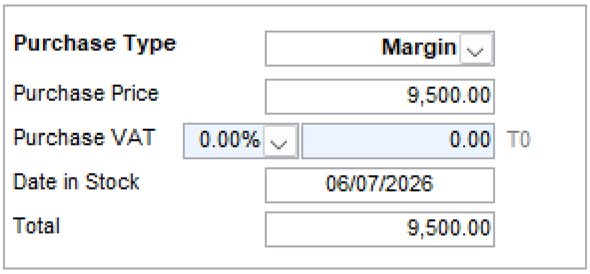
In the vehicle record, click on Supplier and enter the Supplier details. If the Supplier is already in your data, click on Find and search for the contact. If they are a new Supplier click on New and add the Supplier details.



Enter Purchase Details

Use the Invoicing button to link you to the invoicing screen. To enter the purchase details click on the Purchase action tab.

It is important that you select the correct Purchase and Sales Type; these control the VAT that is applied to the purchase and sale of the vehicle.



DragonDMS has been designed to display the correct Sales Type based on the Purchase Type selected. For example if you set the Purchase Type as Margin you cannot set the Sales Type as Qualifying or Commercial due to the rules of the Margin VAT scheme.

You can change the default Purchase and Sale Types in Settings > Vehicle Sales > Defaults.

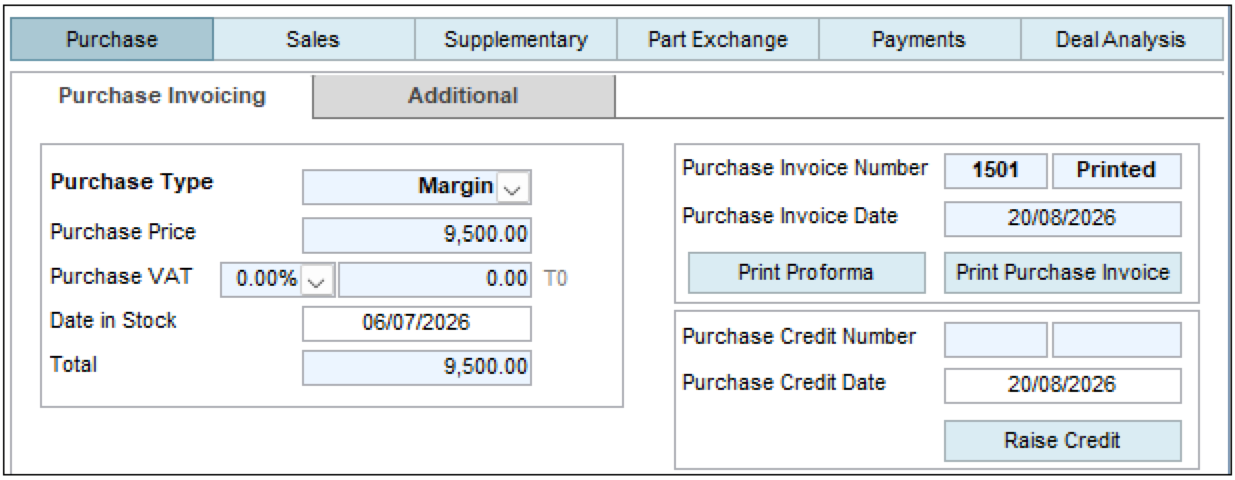
A full list of Purchase and Sales Types can be found in Appendix 1 at the end of this manual.

Select the correct Purchase Type, enter the Purchase Price and Purchase Invoice Date – this will default to the current date so make sure that you enter the actual date that is on the purchase invoice (if you are integrating to Sage this is the date that will be used to post the Purchase invoice transaction) and print the purchase invoice.

Make sure that the Date in Stock is the actual date that you received the vehicle in order to age your vehicles correctly.

Be aware that if you don't print a purchase invoice the system will automatically mark the purchase as printed when you sell the vehicle (i.e when you print a sales invoice).

The date that will be used for the purchase invoice date in this scenario will be the same as the sales invoice date.

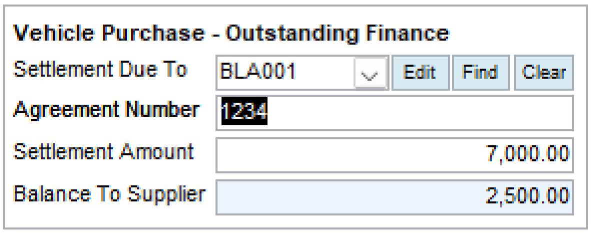


Once the Purchase Invoice is printed you will not be able to change the Supplier, Purchase Price or Outstanding Finance figures. If you need to edit these details you will first have to credit the purchase.

Purchasing a Vehicle with Outstanding Finance

Go to Invoicing > Purchase and select the Finance Company from the drop down list. If the Company is not in the list you will need to create a new Finance Company, click on the New button to do this.

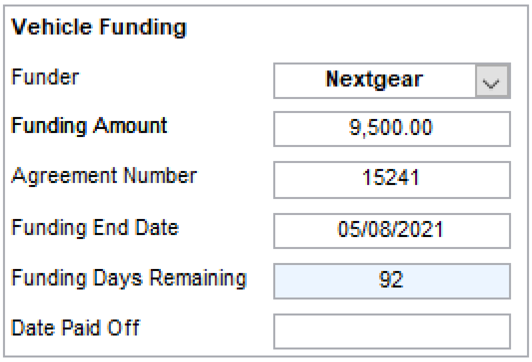
Enter the Agreement Number and the Settlement Amount.



If the Settlement Amount is less than the Purchase Price the difference will show as Balance to Supplier. If the Settlement Amount is more than the Buying Price (Negative Finance) the difference will show as Supplier Owes.

Vehicle Funding

If a vehicle is on a funding plan you can log the funding details on the Purchase screen. Multiple different funders can be setup in Settings > Vehicle Sales > Settings > Invoice > Funder.



Select the funder, enter the amount of funding, agreement no and funding end date. DragonDMS will calculate the number of days remaining on the funding.

These funding fields can be added to your lists of vehicles in stock as customisable columns.

The Stock Report – Funding will list all vehicles in stock currently on funding, grouping by funder to show the total amount of funding and the number of days remaining on each vehicle.

Setting the Screen Price

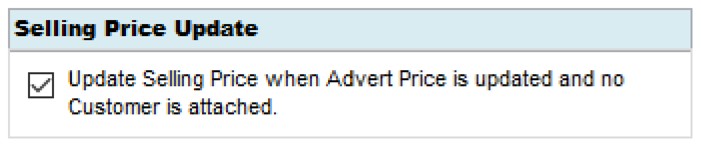
Go to Invoicing > Sales > Sales Invoicing and enter the Screen Price for the vehicle. The Screen Price is the value before any discount or VAT.

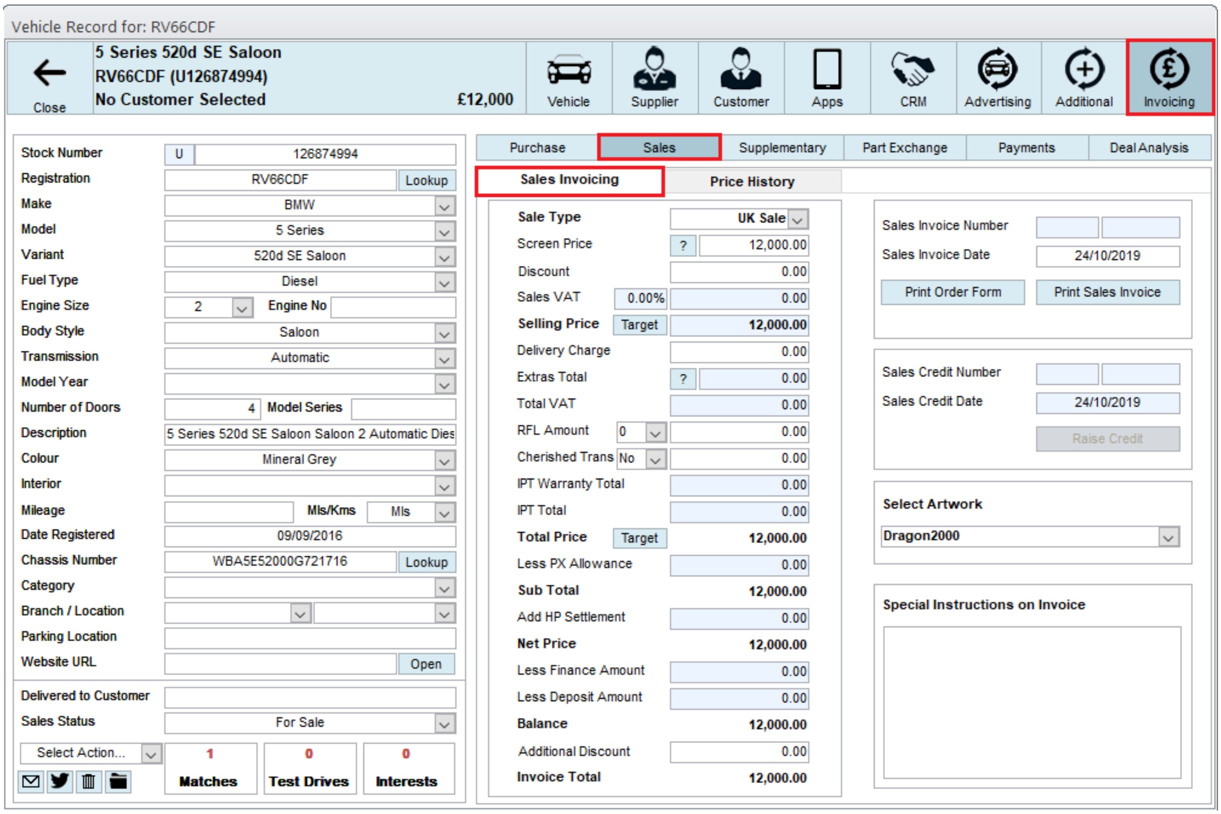
Screen Price versus Advert Price

If the Advert Price has already been entered, then the screen price will show the original advert price. Conversely, if the screen price is added before the advert price, the advert price will show the original screen price.

From this point onwards, the screen price and advert price are not linked. Changes to either price will not affect the other.

If you would like the Advert price to update the Selling price, go to **Settings > Vehicles Sales > Defaults > Vehicle tab and tick this option.**





The Sales Type will display your default setting; the Sales Type on a vehicle can be changed at any point up to the printing of the Sales Invoice after which it will be locked. The Sales Type controls the VAT rate and Tax codes that are applied to the Sale and is linked to the Purchase Type so that you can only select Sales Types that are valid with the Purchase Type.

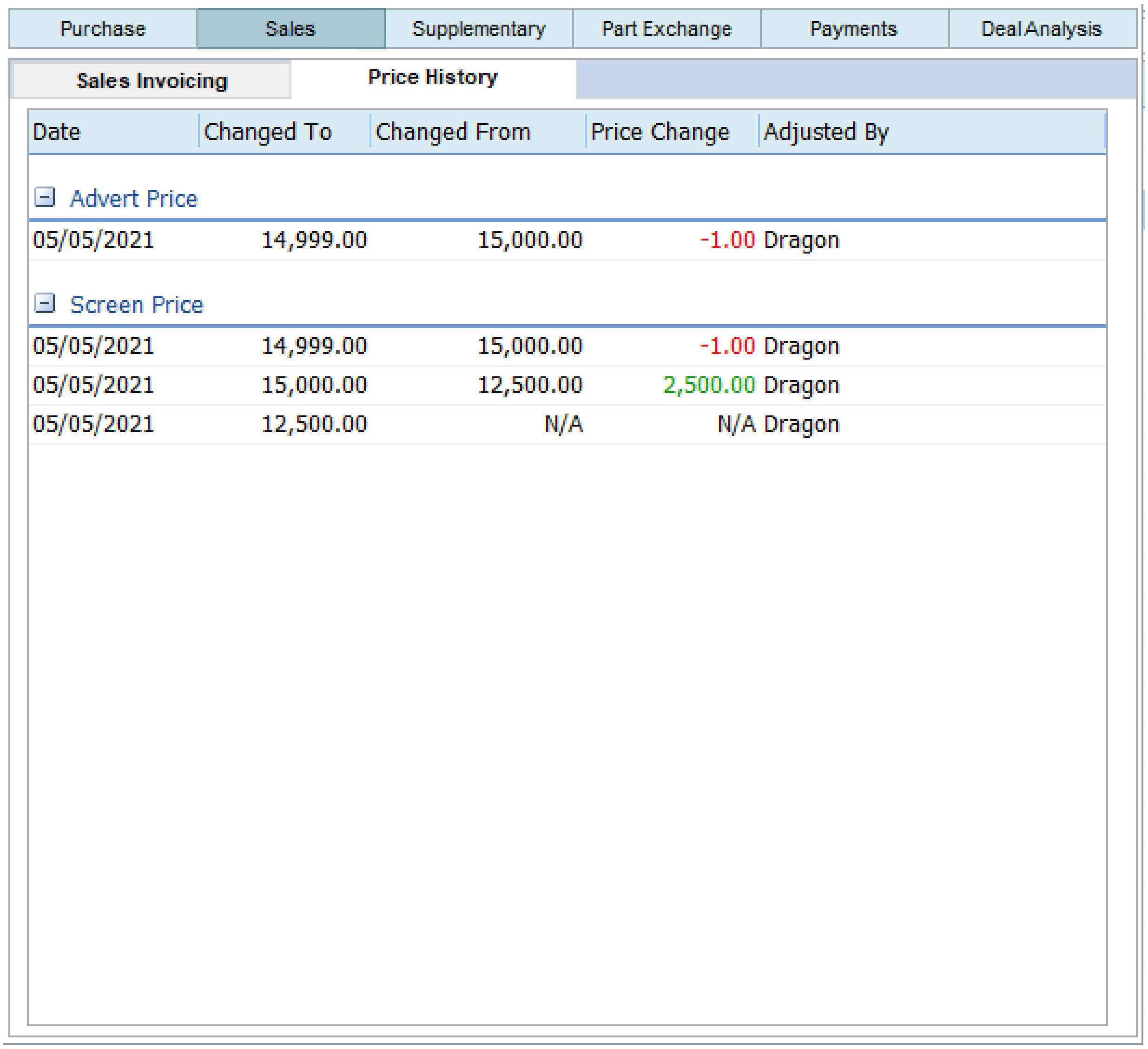
For example, if the Purchase Type is set as Margin you cannot set the Sales Type as Qualifying or Commercial due to the rules of the Margin VAT scheme.

A full list of Purchase and Sales Types can be found in Appendix 1 at the end of this manual.

The Screen Price for Commercial and Qualifying cars should be the Net figure as VAT will be calculated automatically.

Viewing Price History Changes

From within the Invoicing and Sales screen, you can also view the history of all price changes that have been made against that vehicle record by clicking on the Price History tab.
This will help you to keep track as to when the Screen Price or Advert Price of a vehicle has been increased or reduced, how much by and who made the change.



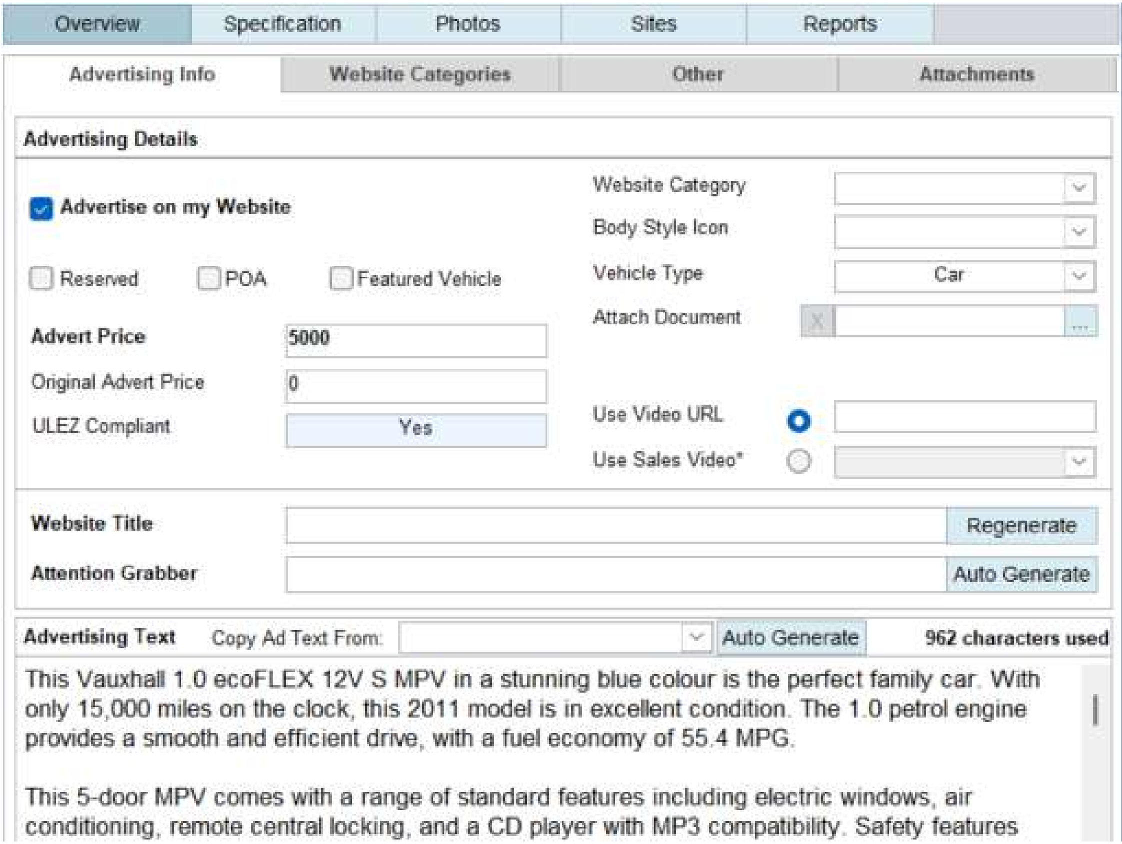
Advertising

If your company website is supplied and hosted by Dragon2000 then your vehicle stock can be added to your website as soon as you have created the record in DragonDMS. Access to edit any of the advertising information can be restricted by user through their user access rights.

From within a Vehicle Record go to Advertising > Overview. The Advert Price is the price that will be sent to all advertising feeds unless changed on the Sites tab. See Page 22 for more information.

Video urls added will be included in the feed to AutoTrader, as well as to Dragon2000 hosted websites.

The rest of the information in the section titled Advertising Details only applies to websites supplied and hosted by Dragon2000.

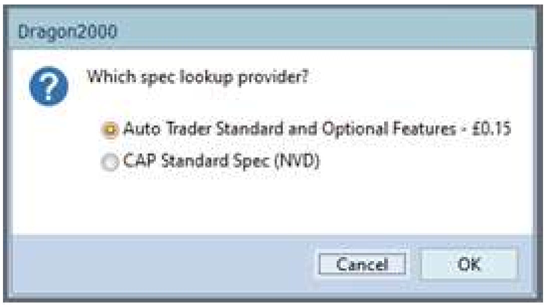


Once you have filled in all of the vehicle advertising, to upload your vehicle to your Dragon2000 hosted website tick the Advertise on my Website option. You can decide if you wish to mark the vehicle as a featured vehicle, and if the vehicle has been discounted you can show the original advert price.

The section titled Advertising Text is used for advertising to all sites. To upload vehicle details to other online advertisers or your own website (not supplied and hosted by Dragon2000) see the Advertising > Sites section below. As you add your advertising text, a record count of the number of characters used will be shown.

Specification

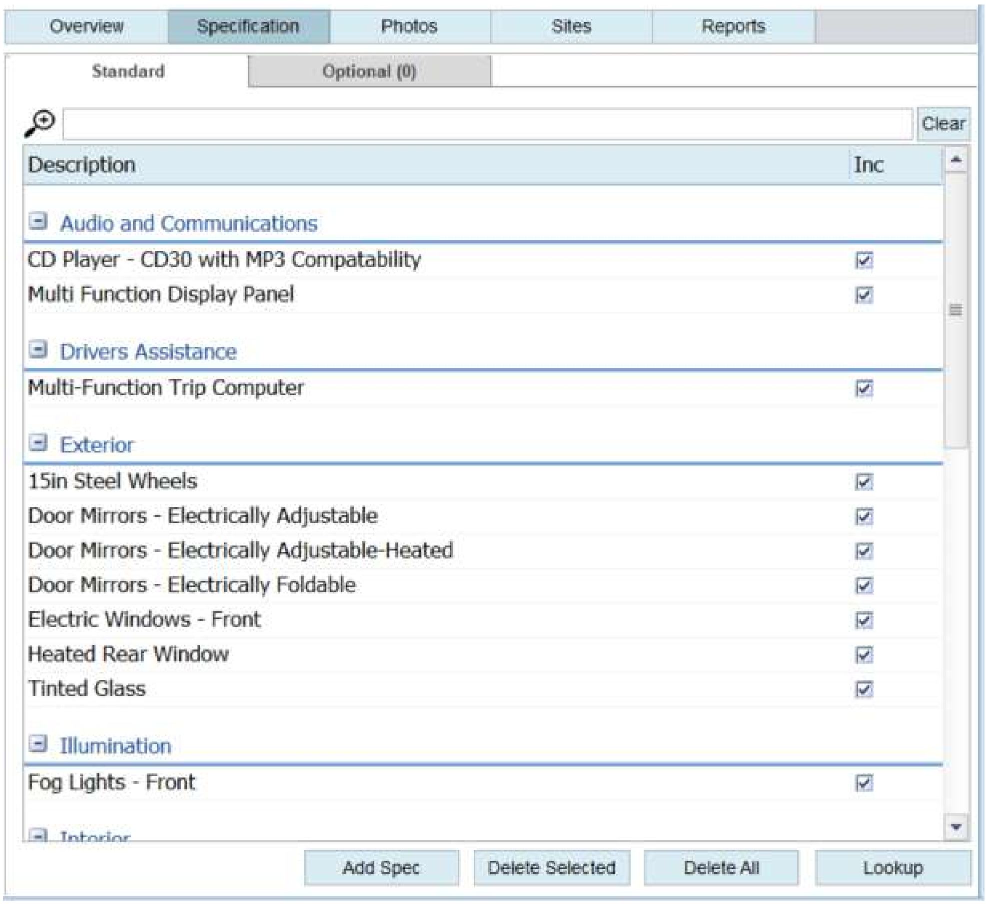
This feature will populate a list of standard specification specific to the vehicle.



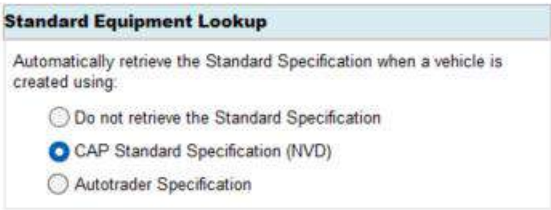
**Subscriptions are required to access CAP Standard Specification.*

AutoTrader Specification & Optional Features is £0.15 per lookup, this money is taken from your Cash Wallet. To top up your Cash Wallet contact our Accounts team.

***For Dealers that have linked their DragonDMS to their AutoTrader DID via the live feed, these lookups have no charge.**

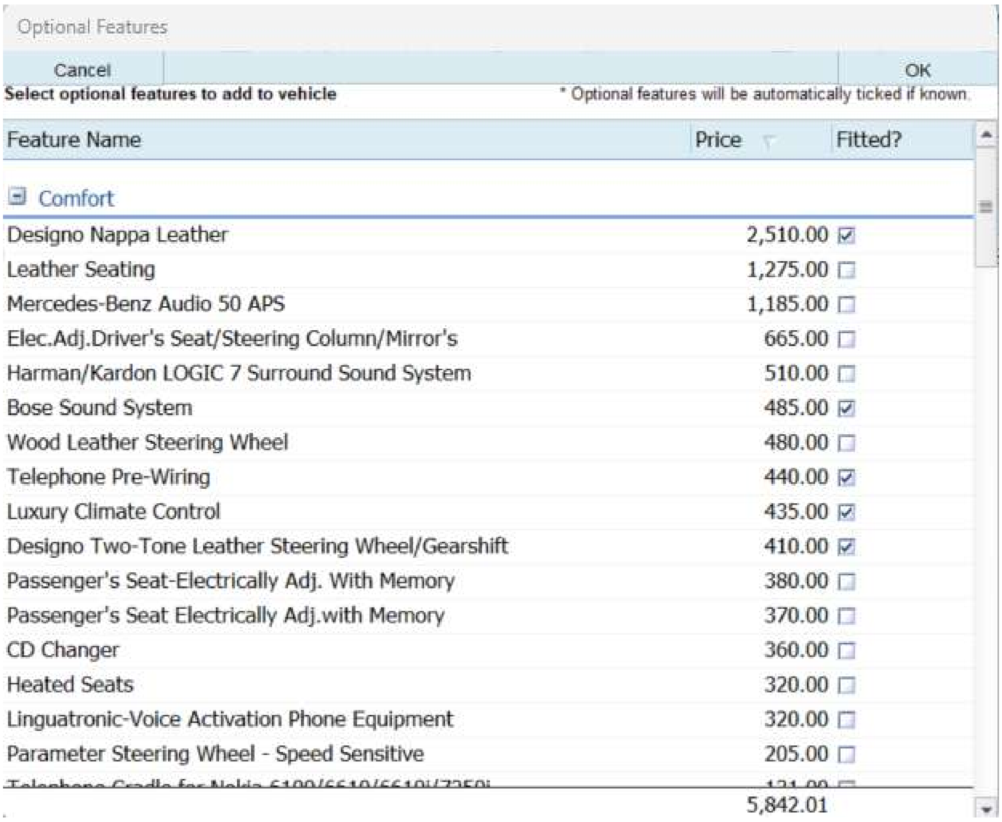


To automatically retrieve standard equipment when a Vehicle Record is created go to Settings > Vehicle Sales > Defaults > Creation > Standard Equipment Lookup and tick relevant option.



Optional Features

Using the Same lookup, you will be able to select any optional features that the vehicle also has, by clicking in the checkbox. Items with an asterisk are compatible with advertising on eBay. If you choose to include the vehicle in your advertising export, this information will be included.



Additional features can be manually created on this screen or within Settings > Vehicle Sales > Vehicle Specifications > Optional Specification. These can then be applied within the Optional Features screen by pressing 'Add Spec'.

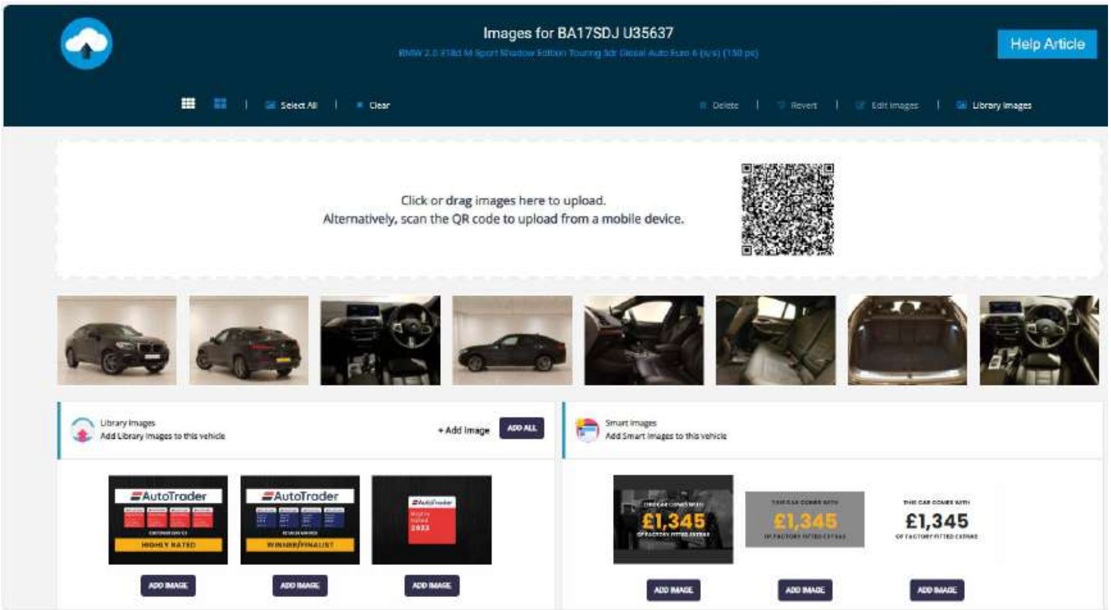
HPI Spec Check

The HPI Spec Check returns the exact factory fitted options by decoding the VIN of the vehicle.

* A subscription to HPI Spec Check is required. This service will list all of the standard and optional features that were fitted to the vehicle.

Photos

A web page will open where you can either browse for saved images, drag and drop or use the QR code to upload the images.



Each photo should be no bigger than 10MB. Once the images are uploaded, drag and drop to change the order of the images.

Library Images

Generic images can be added to the Image Library. Images from the Library can then be added either in bulk or individually to the vehicle specific images. When added they will appear after the last image. Users can drag and drop to reorder the images.

Smart Images

Smart images automatically generate based on the value of any optional extras that have been added to the vehicle. When a Smart image is added it will show the value of the extras at that point in time. If optional extras are added or removed, you will need to delete the image and re add to show the new value of the optional extras.

Image Editing

Banners and images can be overlaid on images using the Image Editor. These can be added individually, or if multiple images are selected, the overlays can be applied to all.

Banners and images can be saved as templates to be reused.

Sites

For individual Vehicle Records, you can select the online advertisers that you wish to submit the vehicle details to.

The list of advertisers can be customized to show only those that you advertise to, the set this go to Settings > Vehicle Sales > Settings > Advertisers and untick the advertisers you don't use.

For Advertisers that accept an attention grabber, this information will be taken from the Advertising Overview screen. If you want to edit the attention grabber for a specific site, double click on the site name and you will see the attention grabber for that specific site, which you can then edit.

The price column is populated by the Advert Price on the overview screen. If you want to send different prices to different advertisers, this can be done by clicking in the Price column for the relevant advertiser and entering the price you wish to send to them.

Overview	Standard Equip	Features	Photos	Sites	Reports

Location	Checked	Price
⊞ AA Cars	☐	0.00
⊞ Auto Trader Live Advert -- Double click for more information	☐	0.00
⊞ Auto Trader Profile Page -- Double click for more information	☐	0.00
⊞ CarGurus	☐	0.00
⊞ eBay Motors Pro -- Double click for more information	☐	0.00
⊞ Exchange and Mart	☐	0.00
⊞ Motors/EMG (eBay Motors Group)	☐	0.00
⊞ My Website	☐	0.00
⊞ PistonHeads	☐	0.00

Clicking on the + will show the frequency and times the feed is sent to the advertiser.

⊟ eBay -- Double click for more information	☐	12000.00
└ Automatically uploaded each day at 08:30, 11:30, 14:30 and 17:30		

Reports

Click the Reports tab from the advertising section of a Vehicle Record to either preview, print, save as a PDF document or email Silent Salesman reports and Vehicle Details report.

Overview	Standard Equip	Features	Photos	Sites	Reports

Report				
Silent Salesman	Preview	Print	PDF	Email
Silent Salesman - 9 Images	Preview	Print	PDF	Email
Silent Salesman - Alternative	Preview	Print	PDF	Email
Silent Salesman - No Images	Preview	Print	PDF	Email
Silent Salesman - No Images - Landscape	Preview	Print	PDF	Email
Silent Salesman - Three Images	Preview	Print	PDF	Email

If you have a subscription with CAP that allows you to retrieve Standard Equipment information, this will be displayed on the Silent Salesman report.

Vehicle Details

Make:	Nissan
Model:	Qashqai Dci Acenta Smart Vision 5
Body Type:	Hatchback
Engine:	1.5
Transmission:	Manual
Year:	2015
Mileage:	
Price:	£15,000.00

Specification

Engine Power:	108bhp
Max Speed:	112mph
Acceleration(0-62MPH):	12.4secs
Extra Urban Consumption:	79.8mpg
Combined Consumption:	74.3mpg
CO2:	99g/Km
Insurance Group:	

Standard Equipment

Driver Convenience

- ✓ 5" TFT driver information centre
- ✓ Front and rear parking sensors
- ✓ Service interval indicator
- ✓ Trip computer
- ✓ Bluetooth phone integration system
- ✓ Lane departure warning system
- ✓ Speed limiter
- ✓ Cruise control
- ✓ PAS
- ✓ Traffic sign recognition

Entertainment

- ✓ 6 speakers
- ✓ USB/aux input socket
- ✓ Radio/CD
- ✓ Steering wheel mounted audio contro

Exterior Features

- ✓ 2 speed wipers+variable intermittent wipe
- ✓ Body colour bumpers
- ✓ Chrome window surround
- ✓ Automatic headlamp activation
- ✓ Body colour door mirrors and handles
- ✓ Electric front/rear windows
- ✓ Black honeycomb front grille
- ✓ Body colour electric/heated door mirr
- ✓ Front fog lights with chrome surround

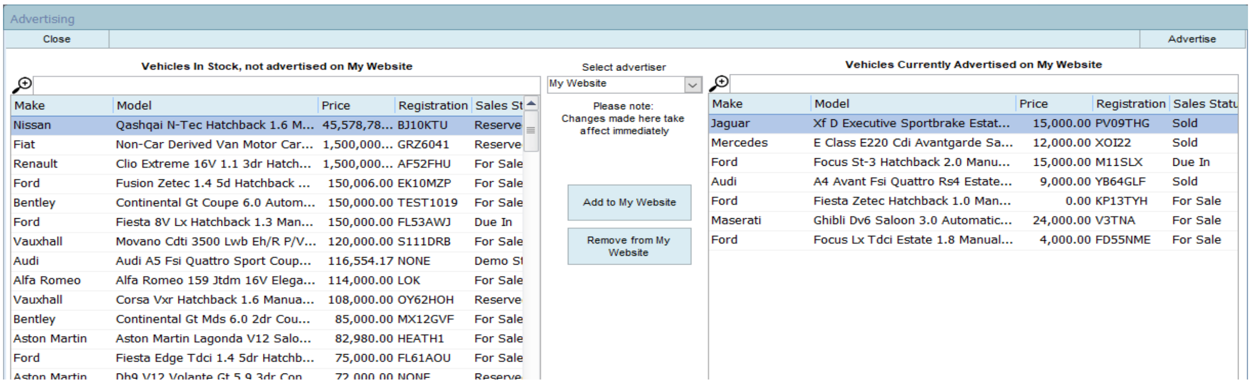
A report is also available to show you all vehicles that are currently advertised and on which sites along with how many photos / videos have been uploaded. This can be accessed from the Reports module of Dragon, Used Vehicle Sales > Advertising > 'Vehicles Advertising Export'.

Bulk Advertising

If you want to submit multiple Vehicle Records to an online advertiser you do this through the Advertising tool, Used Vehicles > Advertising.

The list on the left hand side is all vehicles that are currently in stock. Select the specific advertiser from the dropdown list in the middle of the screen, Select Advertiser. Highlight the vehicles on the left that you would like to submit to the chosen advertiser. Click on Add to Advertiser Selection and this will move the vehicles to a list on the right.

Repeat the above steps for any other online advertiser that you want to use.



The Options button lists features that you may want to suppress from your advertising feeds.

Dragon2000 will compile your vehicle data and photos and submit the data to the online advertisers at preset intervals throughout the day.

Vehicles that have no selling price or a selling price of 0.00 will not be advertised.

Viewing all Advertised Vehicles

To view all vehicles and where they are currently being advertised go to Used Vehicles and select the Advertising category.

It will default to show you all vehicles with an overview of where each of them is being advertised. You can customise this screen by adding and removing columns.

To view the vehicles being advertised for a specific advertiser, select the relevant Advertiser from the list.

Auto Trader

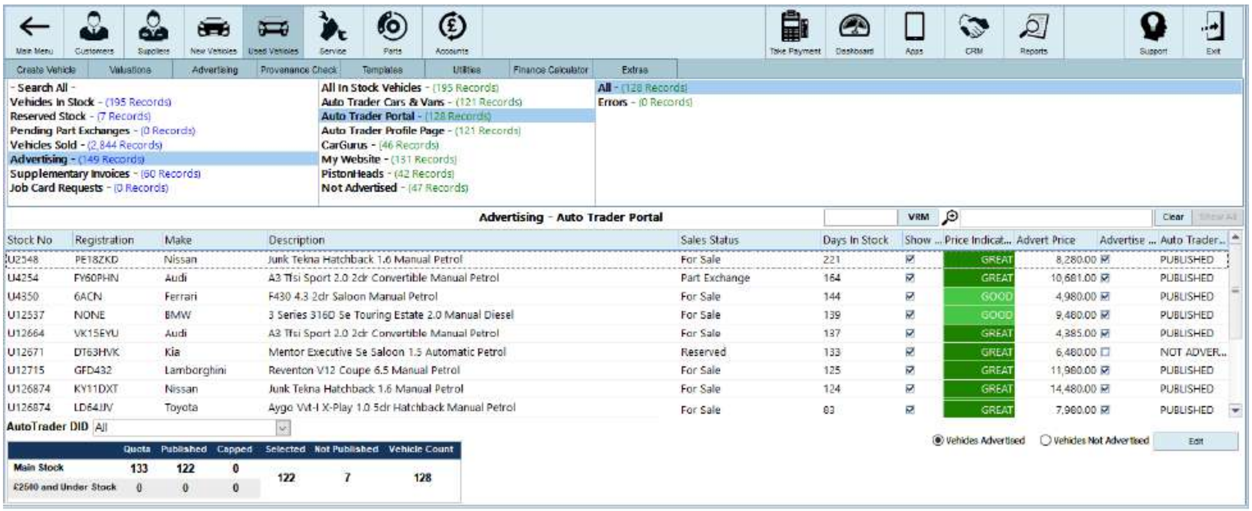
If your Auto Trader account is linked to your DragonDMS, all the vehicles on Auto Trader Portal will be displayed in the Auto Trader Cars & Vans list.

This list allows you to:

- Easily manage which vehicles are advertised to Auto Trader.
- The ability to filter between different Auto Trader Dealer ID's if you have more than one branch linked to Dragon and Auto Trader.
- Details of your Auto Trader quota, how many have vehicles are published and how many are free or capped.

	Quota	Published	Capped	Selected	Not Published	Vehicle Count
Main Stock	28	28	5	33	0	50
£2500 and Under Stock	0	0	0			

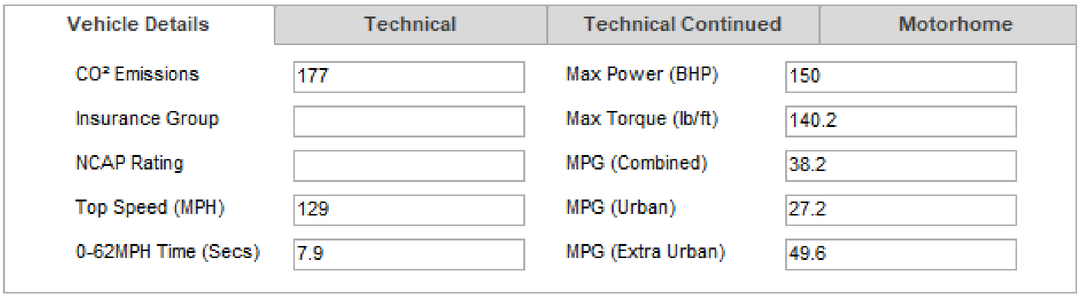
- Auto Trader Status showing if your vehicles have been Capped, Advertised or Not Advertised.
- Price Indicator to let you know if the price is Great, Good, Low etc.

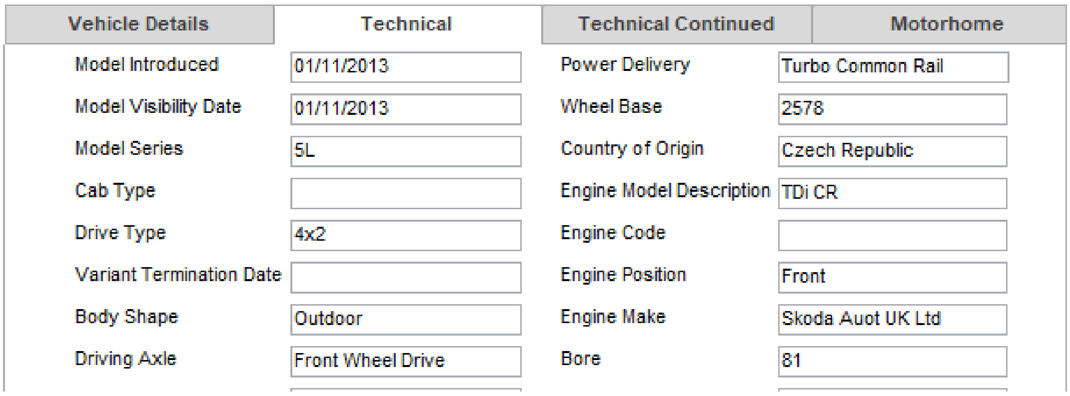


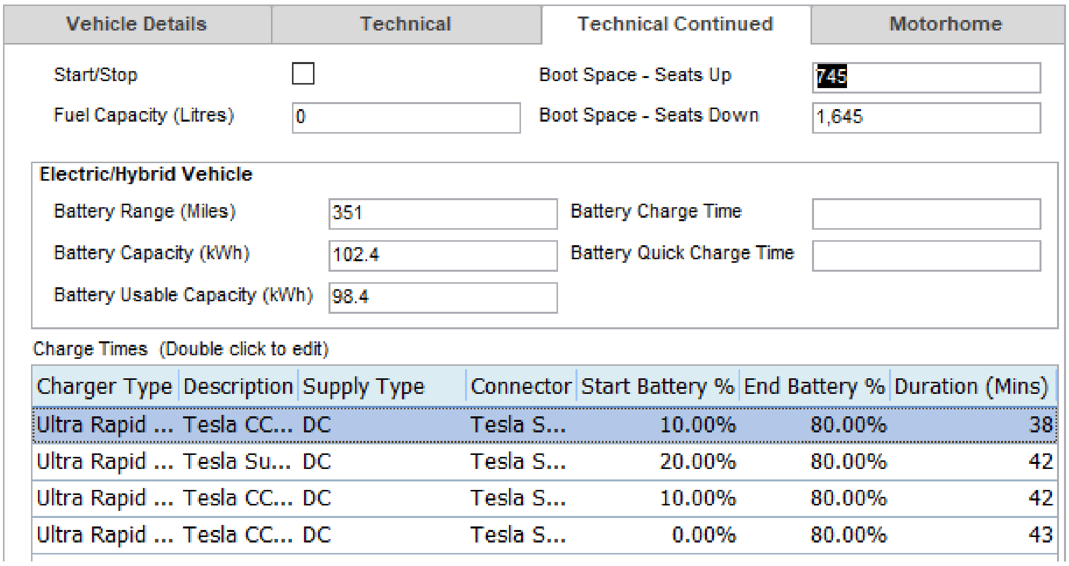
Vehicle Details

Technical / Technical Cont.

These screens show all the technical information for the vehicle. If you use the vehicle lookup tool, most of this data will be populated automatically.

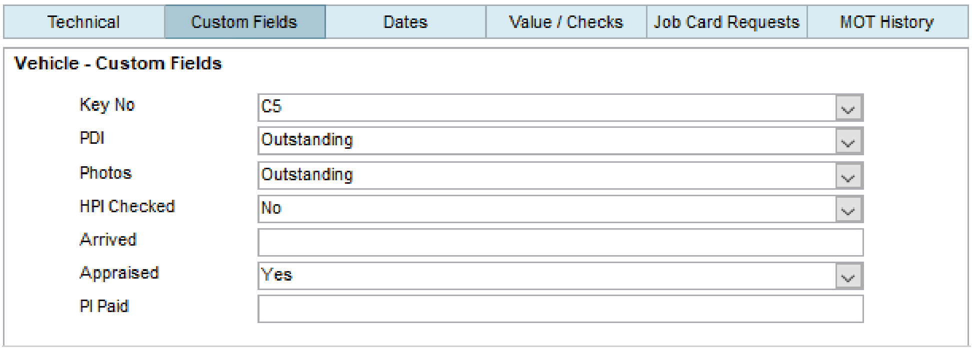






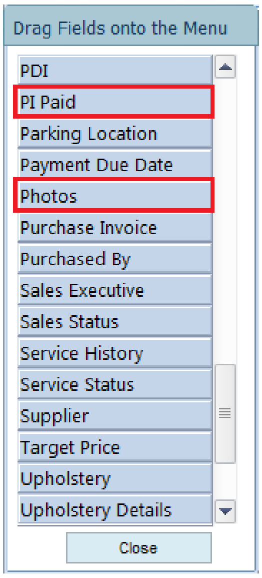
Custom Fields

Custom Fields can be used to log any additional information that you require on a Vehicle Record.



You can create up to 20 Custom Fields by going to Settings > Vehicle Sales > Settings > Custom Fields. For each Custom Field, you can either create your own dropdown list of answers or leave it blank for free text entry.

Custom Fields can then be dragged and dropped to customise your data on the Vehicle Sales screen. To do this right click on any of the column headings and a list will appear showing the column headings available.

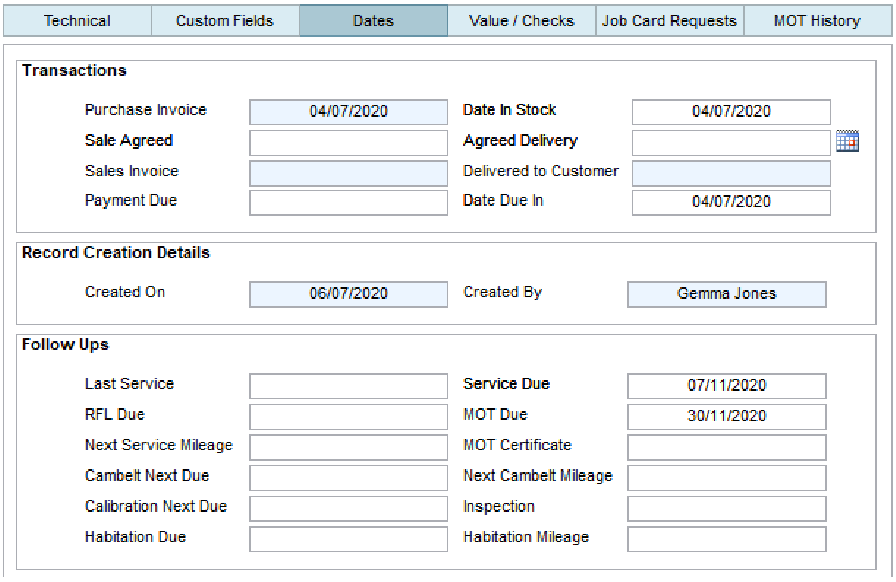


Drag and drop these column headings to add them to your vehicle list.

After you have added or removed columns, the new list layout will be saved against your user and displayed each time you log in with those credentials.

Dates

This screen shows all the dates relevant to the vehicle in one place. Dates that have a blue background cannot be edited on this screen; they are populated automatically from elsewhere within the Vehicle Record.



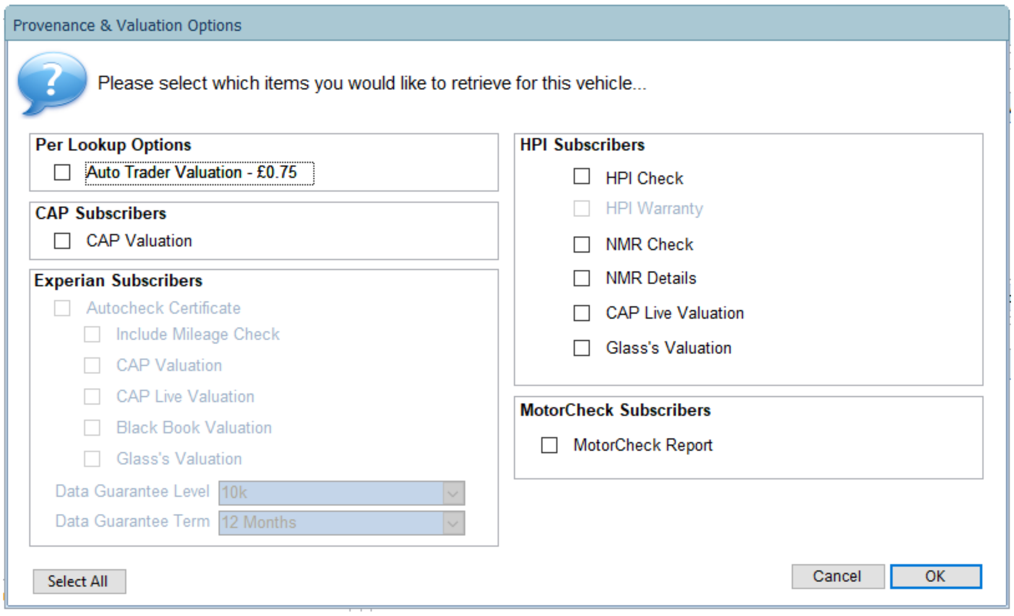
Adding Follow up Dates to a Vehicle Record will allow you to create reminder letters / emails or SMS messages to the new owner to remind them of impending MOT or services that are due.

After a sales invoice has been printed for a vehicle sale, the follow up dates are locked for that Vehicle Record.

The vehicle details are copied to the Customer record under the Current Vehicle tab. You can edit the follow up dates for the vehicle by going to the Customer record and selecting the vehicle under the Current Vehicle tab and clicking Edit to unlock the record.

Values / Checks

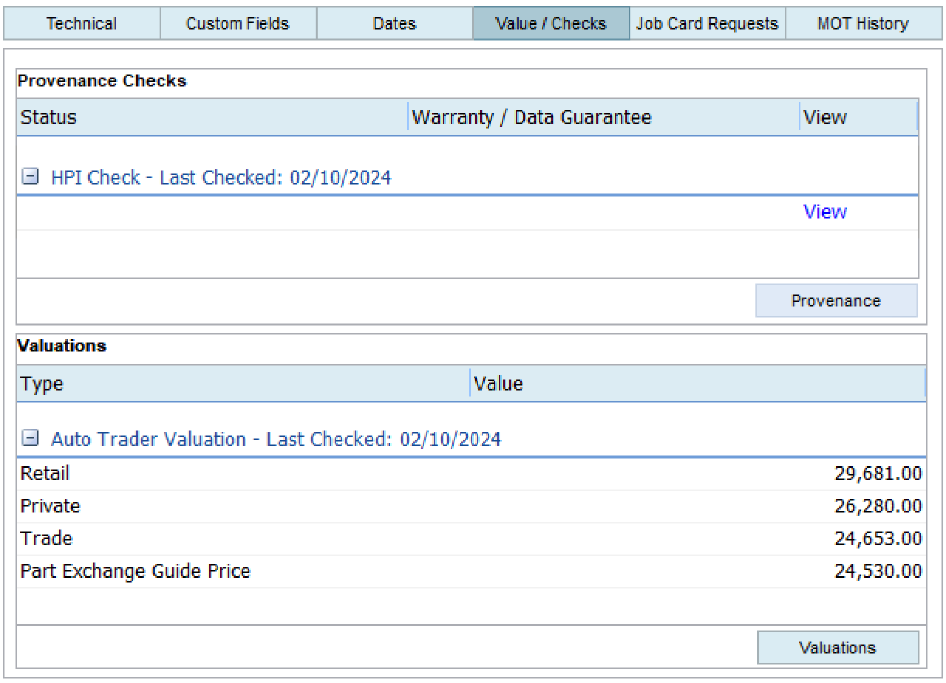
Provenance and valuation checks can be carried out via DragonDMS and the results will be stored against the Vehicle Record.



The options will be greyed out if you do not have an account with each of the data providers.

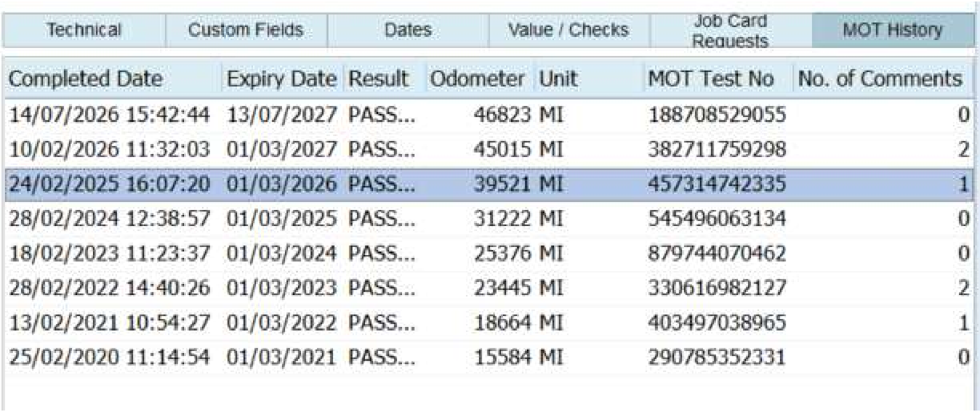
For dealers with an AutoTrader account linked to their DragonDMS there is no charge for AutoTrader Valuations.

If you have accounts with CAP, HPI or Experian or MotorCheck, contact support@dragon2000.co.uk with your account details and we will add them to your DragonDMS account.

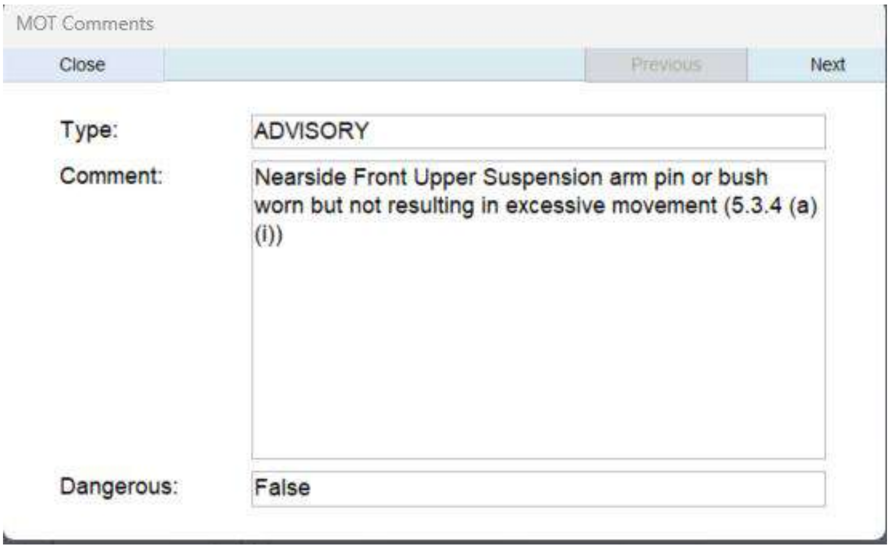


MOT History

Data regarding Vehicle MOT History is pulled through from the Auto Trader lookup on a vehicle and displayed within the MOT History tab. You can click into any Line with comments to read what these are.



Completed Date	Expiry Date	Result	Odometer	Unit	MOT Test No	No. of Comments
14/07/2026 15:42:44	13/07/2027	PASS...	46823	MI	188708529055	0
10/02/2026 11:32:03	01/03/2027	PASS...	45015	MI	382711759298	2
24/02/2025 16:07:20	01/03/2026	PASS...	39521	MI	457314742335	1
28/02/2024 12:38:57	01/03/2025	PASS...	31222	MI	545496063134	0
18/02/2023 11:23:37	01/03/2024	PASS...	25376	MI	879744070462	0
28/02/2022 14:40:26	01/03/2023	PASS...	23445	MI	330616982127	2
13/02/2021 10:54:27	01/03/2022	PASS...	18664	MI	403497038965	1
25/02/2020 11:14:54	01/03/2021	PASS...	15584	MI	290785352331	0

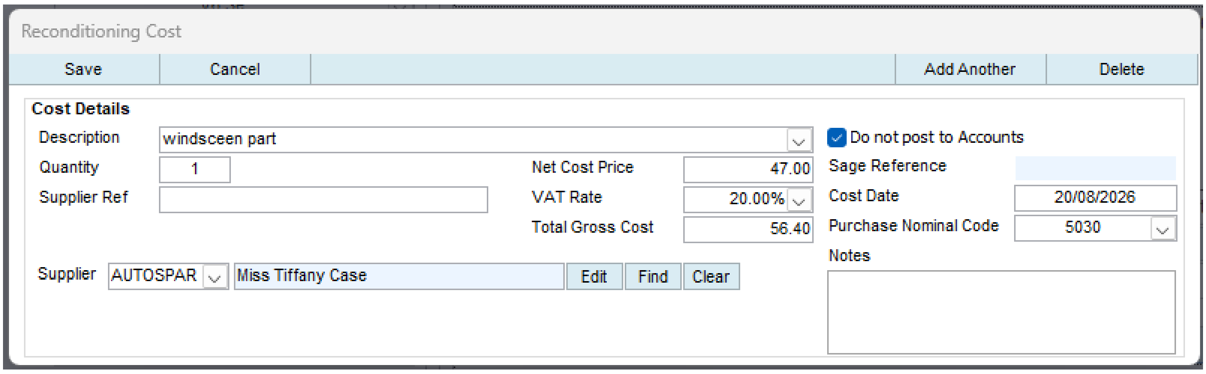


***For Dealers that have linked their DragonDMS to their AutoTrader DID via the live feed, these lookups have no charge**

Recording the Vehicle Costs

Recording Costs

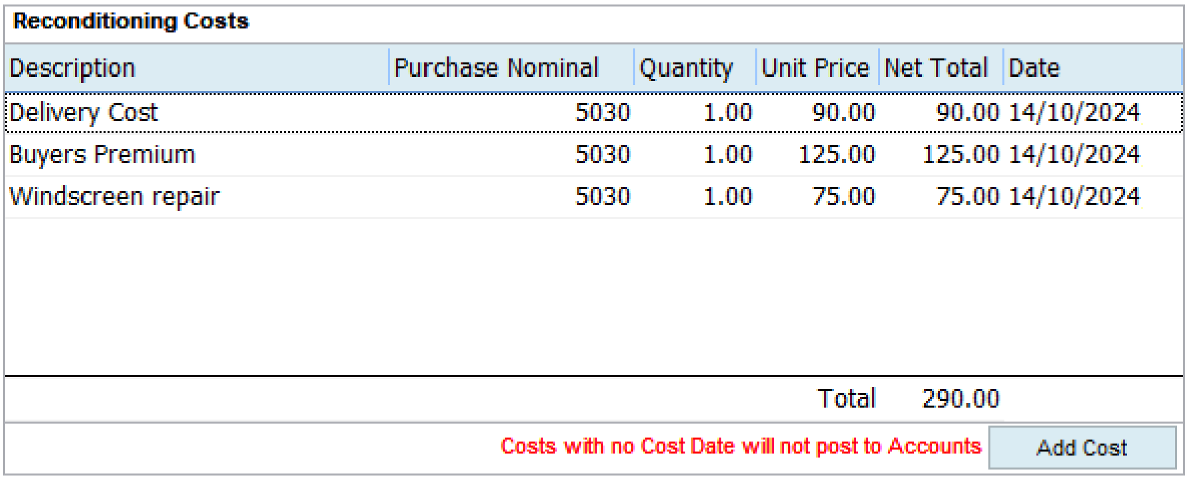
Costs that you incurred on a vehicle can be recorded in Additional > Extra / Costs.



Make sure that the date of your supplier's invoice is entered as the cost date. The supplier's invoice number can be entered in the Supplier Ref box.

Costs that you want to record against a vehicle that you don't want to post to Sage, or include in the Xero export, you can tick the 'Do not post to Accounts' checkbox. This will allow you to record the cost which will increase the SIV (Stand in Value) of the vehicle in DragonDMS, but won't post the cost to Sage or export to Xero.

A list of all recorded costs will in the Reconditioning Costs.



Reconditioning Costs

Description	Purchase Nominal	Quantity	Unit Price	Net Total	Date
Delivery Cost	5030	1.00	90.00	90.00	14/10/2024
Buyers Premium	5030	1.00	125.00	125.00	14/10/2024
Windscreen repair	5030	1.00	75.00	75.00	14/10/2024
			Total	290.00	

Costs with no Cost Date will not post to Accounts Add Cost

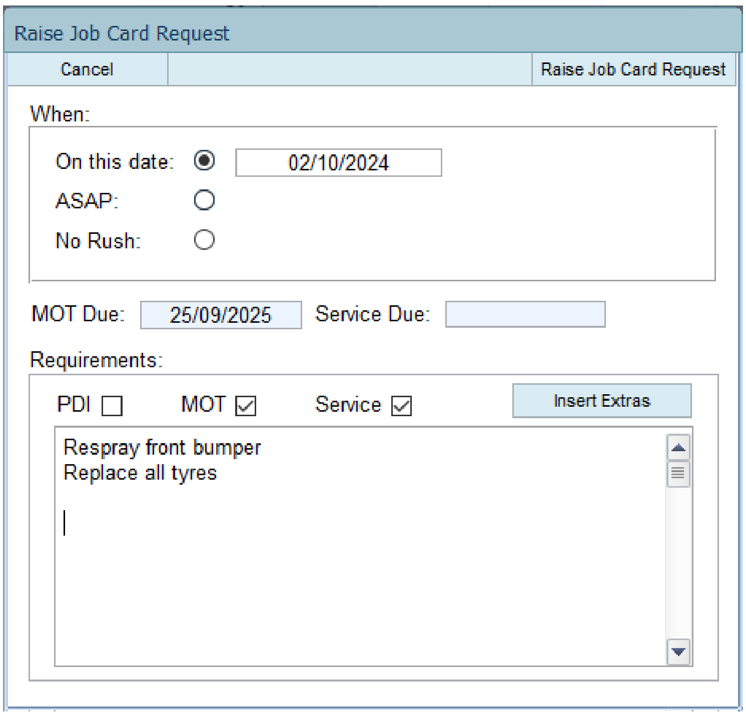
Service Costs & Job Card Requests

For Customers who use the Service Module within DragonDMS, any Service Jobs carried out on Stock Vehicles will automatically be created as Internal Jobs and the invoice value will be posted to the Stock Vehicle Record as a Service Cost.

For these internal service jobs, a Job Card Request can be raised from the Sales Department giving the Sales Executives the ability to raise requests for work to be carried out by the Service Department.

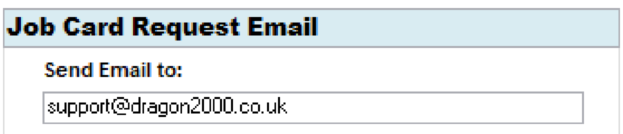
From within a vehicle record, go to Vehicle > Job Card Requests > Raise Job Card Requests.

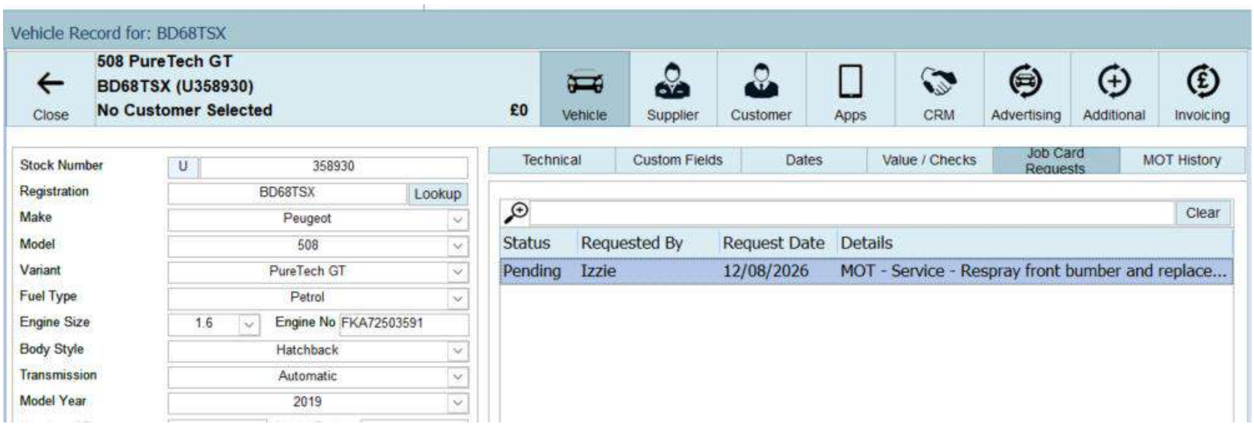
The Sales Executive can request when they would like the work to be completed and what work needs to be done to the vehicle. If any extras have been to the vehicle record that would need to be completed by the Service Department, these can be inserted by clicking the Insert Extras button. If known, the MOT Due date and Service Due date will also show. Once the form has been completed click Raise Job Card Request and this will send the details through to the Service Department.



Once the request has been sent, the Sales Department will be able to track the status of the job from within the vehicle record.

Email notifications can be setup to be sent to the service advisor when a job card request has been raised. To do this go to Settings > Service > Settings > Record Creation where you can fill in the Job Card Request Email setting.





The following statuses will show the current progress of the Job Card Request:

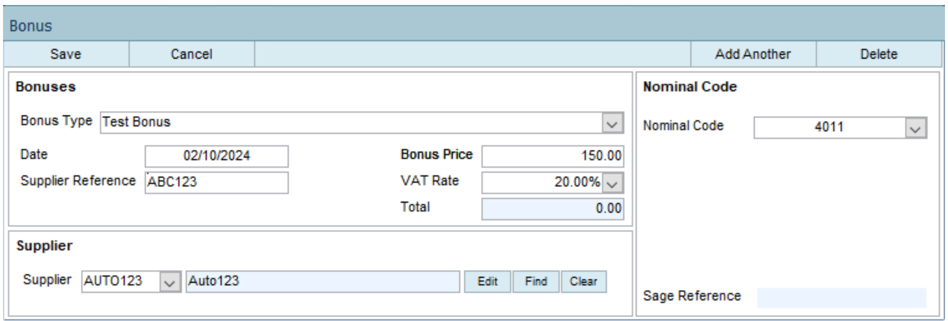
- Rejected - The job has been declined by the service department
- Pending - The request is awaiting approval
- Booked in - The job has been booked in for a future date
- Workshop - The job has been received into the workshop to start work
- Finished - The job has been completed

A list of all Job Card Requests and their statuses can also be viewed from the Job Card Requests sub menu in Used Vehicle Sales.

Bonuses

Multiple Supplier bonuses can be added to a Vehicle Record. Go to Supplier > Bonuses.

The Supplier of the bonus will be set by default to be the Supplier of the vehicle, however you can clear this and add another Supplier if necessary.

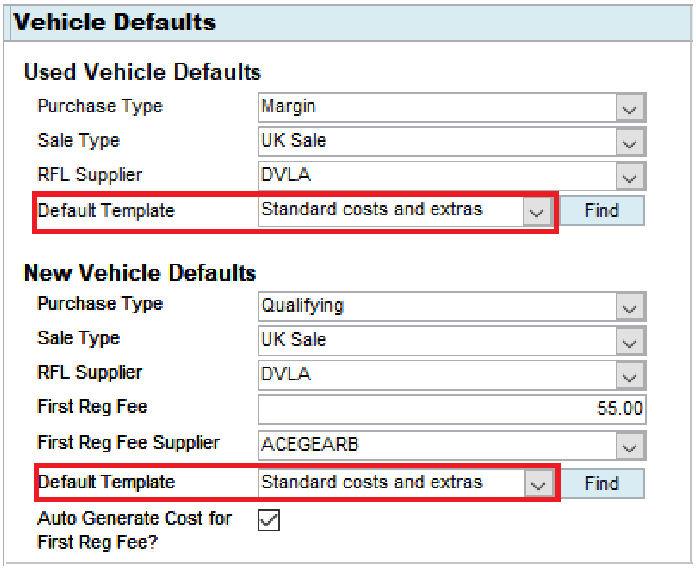


The list of Bonus Types can be added to and edited in Settings > Vehicle Sales > Settings > Bonuses.

Templates

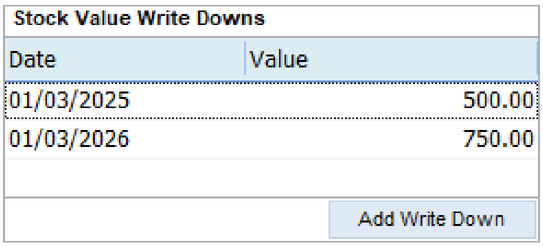
Templates can be created and automatically added when Vehicle Records are created. This is particularly useful when the same costs and extras are regularly added to vehicles coming into stock. To create a new template click on the Templates action tab from the Vehicle Sales menu then click Add New**.**

To assign a template to all newly created Vehicle Record go to Main Menu > Settings > Vehicle Sales > Defaults.

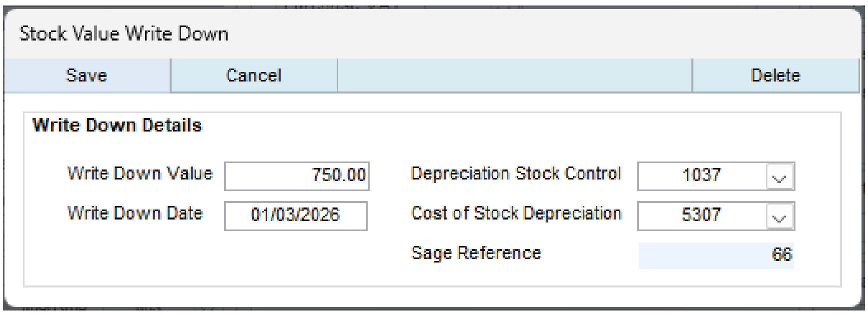


Write Downs

Write downs can be added to a vehicle record on the Invoicing > Purchase screen.



Write downs will reduce the Stand in Value of the vehicle (you can see this on the Deal Analysis Screen).



Customer Relationship Management (CRM) Overview

Tracking the status of your Prospective Customers is an invaluable tool. The Vehicle Sales CRM has been designed to allow you to capture information about your Prospective Customers, their budget and the vehicles they are interested in. You can also create follow up contacts to show on the Sales Executive Diary.

Prospects

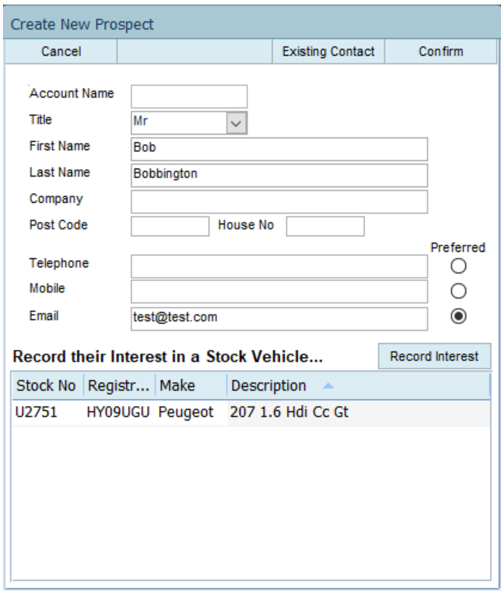
The left-hand window displays a selection of lists containing Prospects who require some form of contact within preset times.

Prospects can be marked as sale agreed which will lock the Prospects details against the Vehicle Record which means the vehicle cannot be sold to another person. When the sales invoice has been printed the Prospect can then be marked as Sale Converted.

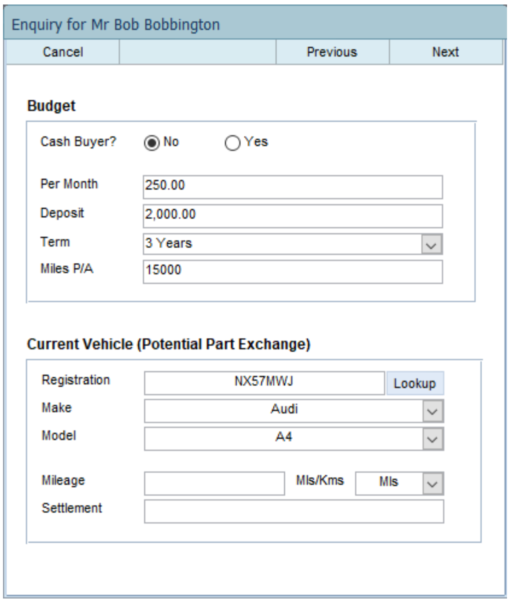
If the Prospect decides not to purchase a vehicle they can be marked as a Lost Sale. A reason for a Lost Sale is required to complete the action. Reports can be run to review the ratio of converted and lost sales.

Create an Enquiry

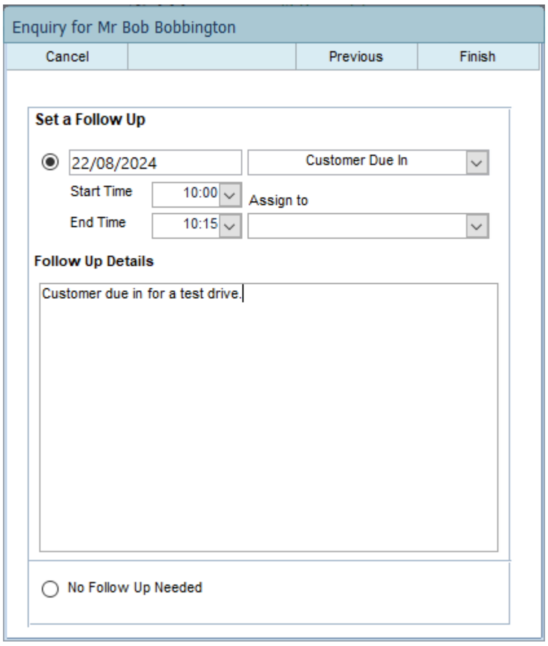
To create a new Prospect Record click on Create Enquiry. Enter their details, preferred contact method and vehicle they are interested in (if applicable). If they are interested in more than one vehicle, multiple vehicles can be selected.



Enter their budget and if they are looking to part exchange a vehicle you can enter their current vehicle. These details do not need to be entered to continue.



The final step of the enquiry is to set up a Follow Up activity detailing what has been agreed with the Prosepct.

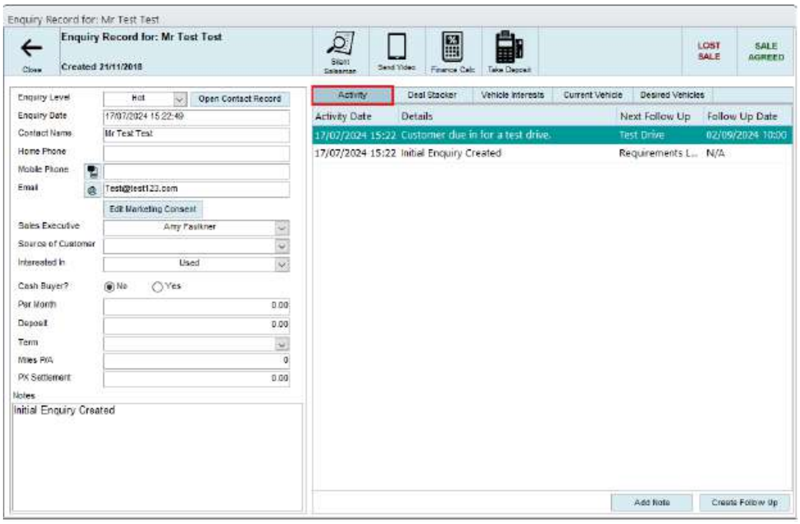


Click Finish to save the details.

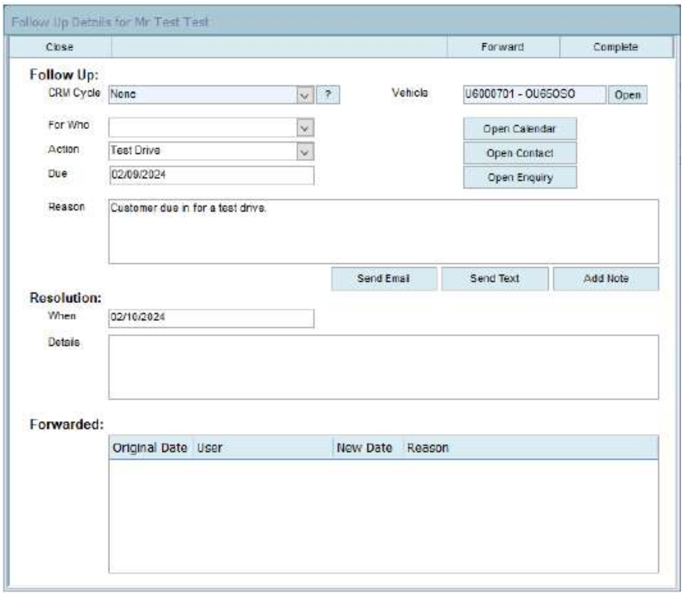
Once the details have been saved, an Enquiry Record for that prospect will be opened.

Actioning your Follow Ups

From the Activity tab of the prospects enquiry record, you can view all of the outstanding and completed actions. Any action showing in turquoise is yet to be completed. From here, you also have the option to add notes onto the Activity record. This is useful if the prospect has sent you an email and you would like to record a copy of this on their record or if you want to record any additional information that does not require a follow up.



Double clicking on the relevant Follow Up will open the Follow Up Details.



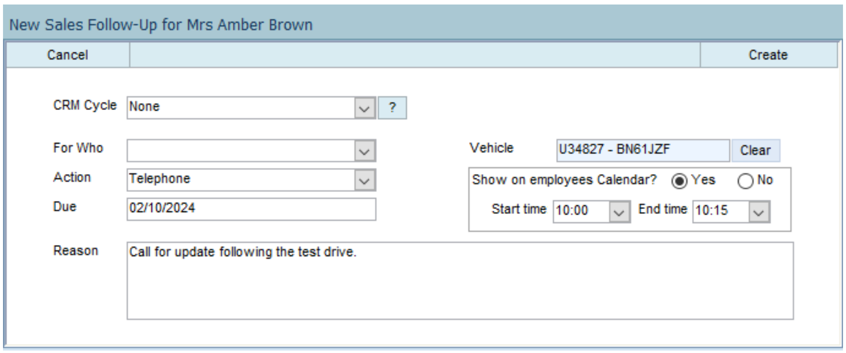
This also gives you the option to Send Email, Send Text or Add a Note about the follow up that was created. For example, if the prospect has booked in for a test drive, you can send them a reminder Text Message of their appointment. All of these actions will be recorded on the Activity Tab of the Prospect Record and the follow up will remain open.
If you have been unable to contact the prospect, you can Forward the follow up for a select number of days. This will not close the follow up but will move the date on, based on the number of days selected.

To resolve a Follow Up that has been created you will need to enter the outcome in the Resolution box and click Complete.

Once completed, you will have the option to create a new follow up if applicable.

Creating Further Follow Ups

After the initial Follow Up has been created, a further Follow Up can be added detailing any future events for a Prospect. From the CRM main menu, select the Create Follow Up action tab and search for the Prospect.



Select whether or not you want the Follow Up to be displayed on the Sales Diary. If you select 'yes' you will need to select a start and end time. This will then show on your calendar.

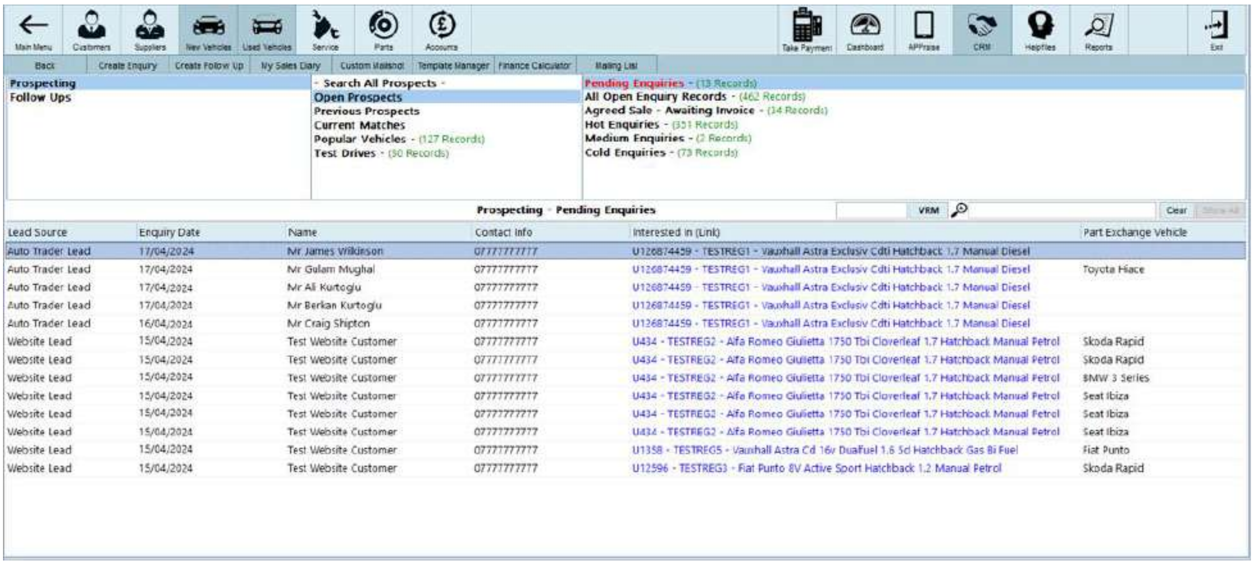
The Action dropdown list can be edited to include your own Custom Actions. To do this go to Settings > CRM > Settings > Custom Events.

Pending Enquiries

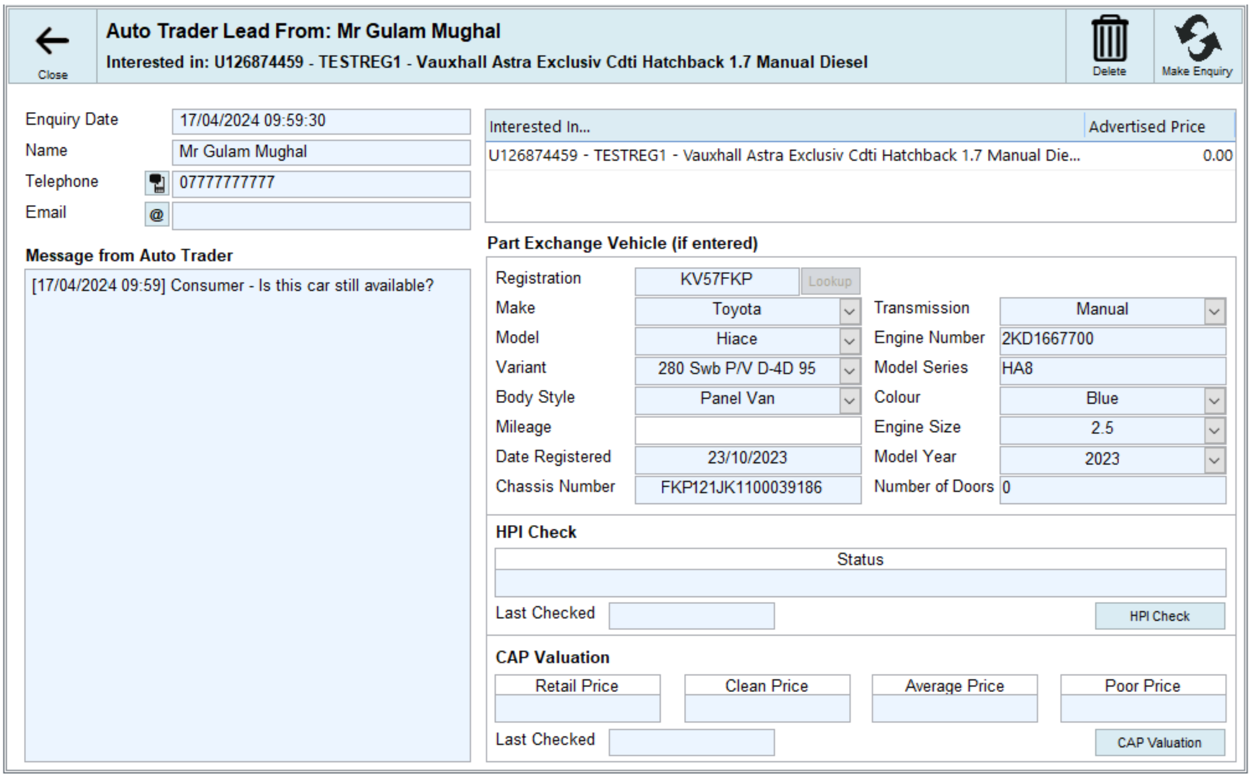
Within the CRM function you can easily receive leads and enquiries that have come from your Dragon2000 hosted Website, Auto Trader or other selected online advertisers. This means there is no need to re-key information into your DragonDMS, it minimises the chance of the lead being missed and it allows you to monitor your sales conversions more accurately.

Viewing your Incoming Leads

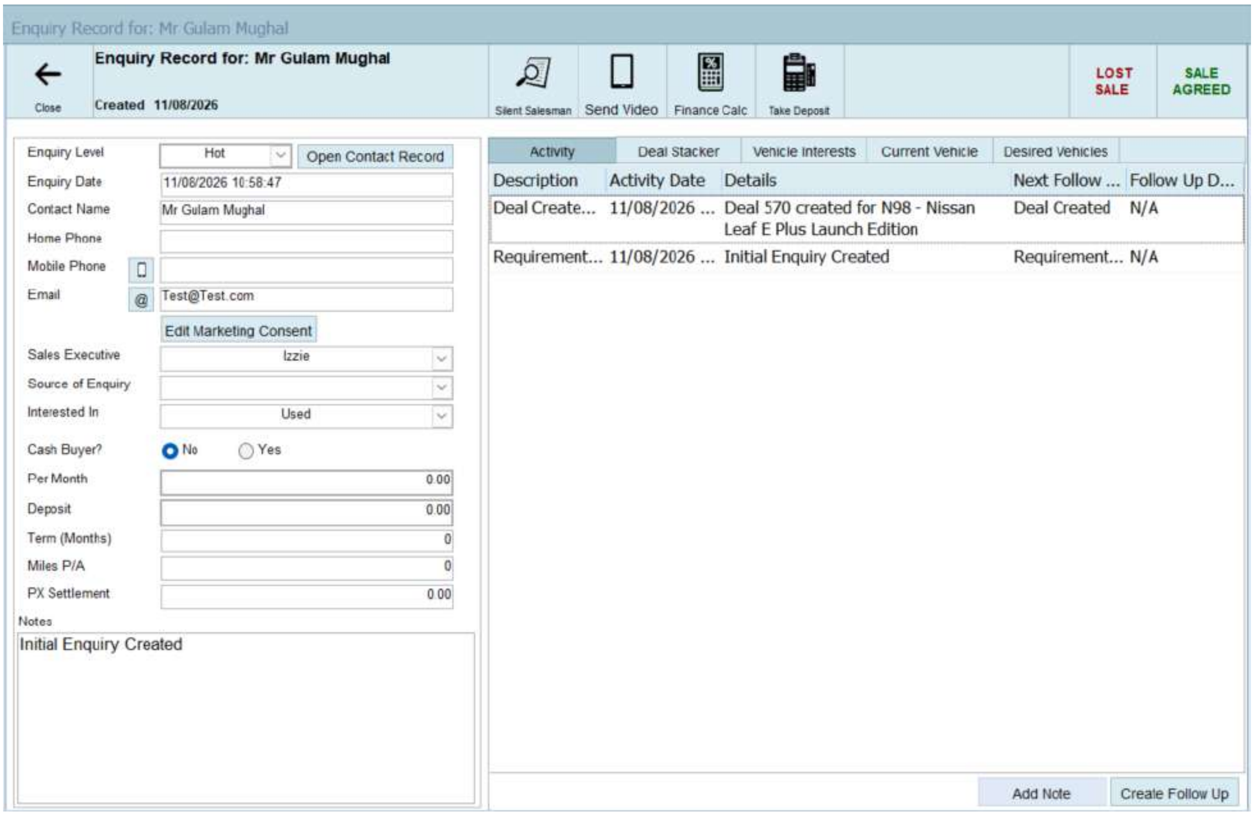
You can view your incoming leads from both your website and Auto Trader within your CRM by going to CRM > Vehicle Sales > Prospecting > Open Prospects > Pending Enquiries. Here you will be able to see a list of all of the leads with the first column detailing where that lead has come from.



By double clicking on any of your leads from the Pending Enquiries menu, you will be able to see the vehicle the prospect is interested in, any part exchange information that has been entered and the message that the prospect has left.

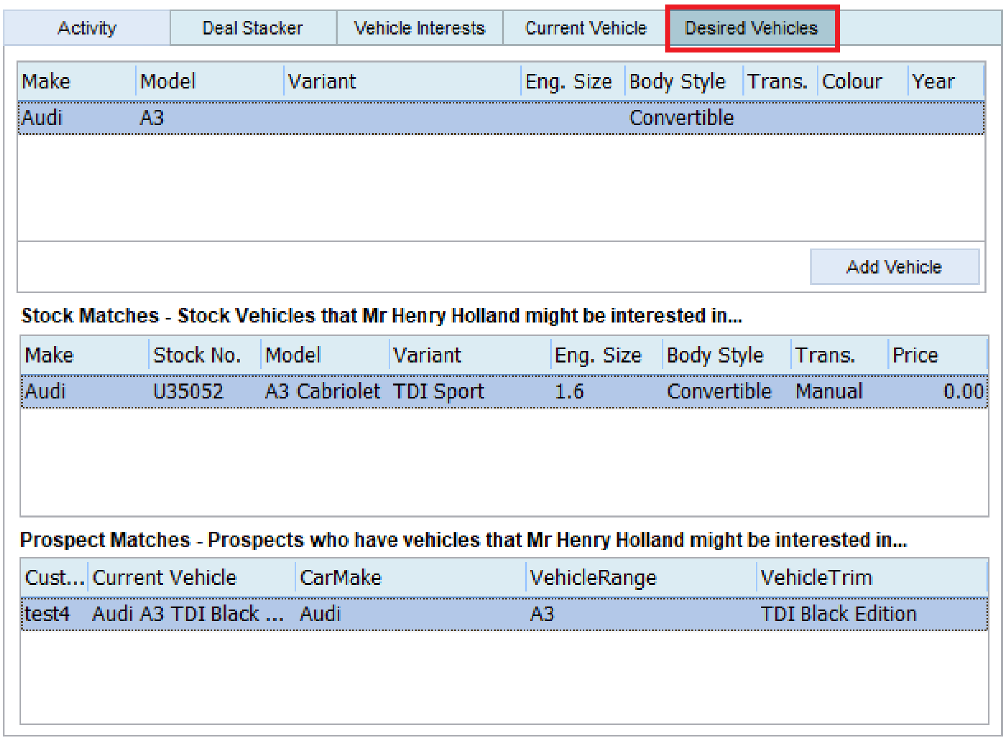


To convert the lead into an enquiry, click Make Enquiry in the top right hand corner. You will then need to enter the name of the Sales Executive who will be dealing with the enquiry. Once this is one you will then be able to start recording any follow ups, calendar events and send a sales video.

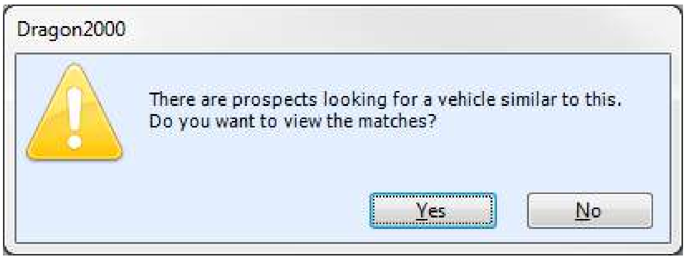


Desired Vehicles

If you do not have a vehicle in stock that they your prospect is interested in but they do know the type of vehicle they would like, then you can log these details by going to Desired Vehicles > Add Vehicle in their enquiry record. You can enter as much, or as little, information here as you want.



Any vehicles that the come into stock that match the Desired Vehicle details will be listed in the Stock Matches section. A message will also be displayed to notify you that a Prospect may be interested when the vehicle is added.

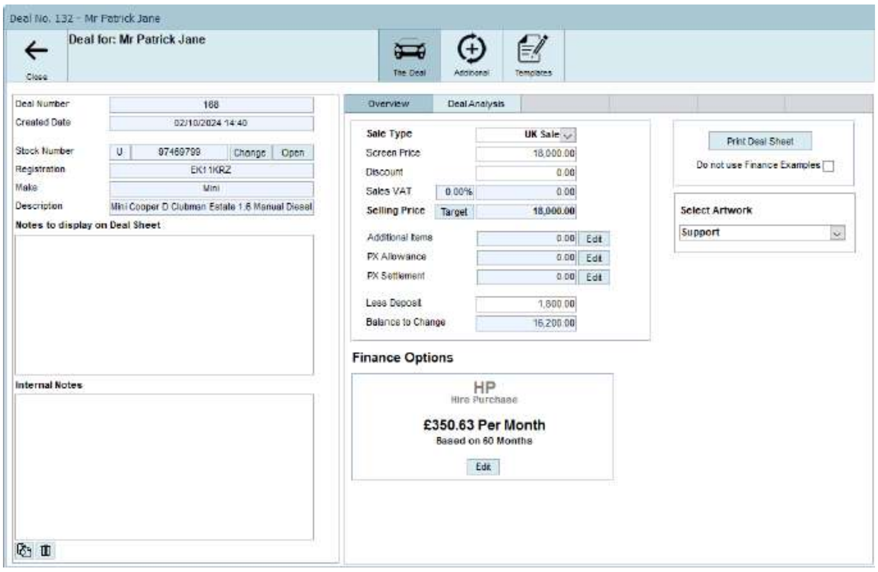


CRM Deal Stacker

The Deal Stacker is a feature that allows you to create and present a proposed deal sheet to your prospective customer, including a “Deal Sheet” breakdown of the sale and representative finance figures (where applicable). Changing the sales figures and adding items to a deal will not change anything on the vehicle record.

From within an enquiry record, click on the Deal Stacker tab, then click on the Create New Deal.

You will then be asked to select the vehicle from your stock that you wish to build the deal against. Please note, if the prospect already has a vehicle of interest logged against them, you will have the option to choose from vehicles of interest or unreserved stock vehicles. Double click on a vehicle to select it. You will then be taken to the Deal screen.



Within the deal screen you can select the Sale Type from the dropdown box.

The Screen Price will automatically populate if the vehicle you have selected has a screen price set in its record. You can edit the price in this screen and it won’t affect the screen price in the Vehicle Record. You can also add a discount on this screen if you wish.

You can also view the current vehicle profit by clicking on the Deal Analysis tab. The Deal Analysis screen is designed to display all the commercial information about the vehicle in one place, specifically to show you the current vehicle profit. The figures on this screen update as you add items or edit the deal.

For more information on this, please refer to the Deal Analysis section on Page 64.

Adding Extras and Costs

Click on the Additional tab and here you can add Part Exchange vehicles, Warranties, Extras/Costs and Additional costs such as RFL Amount, Cherished Transfer and Delivery Charges.

Once you have added on any additional items, click on The Deal tab.

If the Customer is looking at paying on finance for the vehicle, **a representative finance example** will automatically be calculated based on the figures and your default settings.

Click on the Finance tab and you will see the details of the finance. This automatically takes into account any Part Exchange vehicles. You can also see the finance amount over 24, 36, 48 or 60 months. Select which option you would like to show more prominently on the deal sheet.

The default finance settings (deposit amount, fixed rate, admin fees and option to purchase fees) can be editing by going to Settings > Vehicle Sales > Finance.

Templates

If you use the Template option within New or Used Vehicles, you can easily apply a template to the deal that you are creating. This is a useful tool if you have different options that a customer can add in addition to the purchase of their vehicle or if you have the same costs and extras that are regularly added to your vehicles.

From within the Deal, click on the Template button along the top and then Templates... in the bottom left corner.

This will show you a list of all templates that have already been created. Find the relevant template and click Apply or Add New to create a new template. When you apply the template, a list of all components on the template will be shown. From here, you can choose to select any items from the template which you do not want to add to the deal. As a default, all items will be ticked to be added.

Once all of the figures have been entered, click the Print Deal Sheet button to print off a deal sheet for your prospective customer. You can decide whether or not you want to use finance examples on the deal sheet by ticking or unticking the box.

Multiple deals can be built for a prospective customer. These can be on the same vehicle, or different vehicles.

Agreeing a Deal

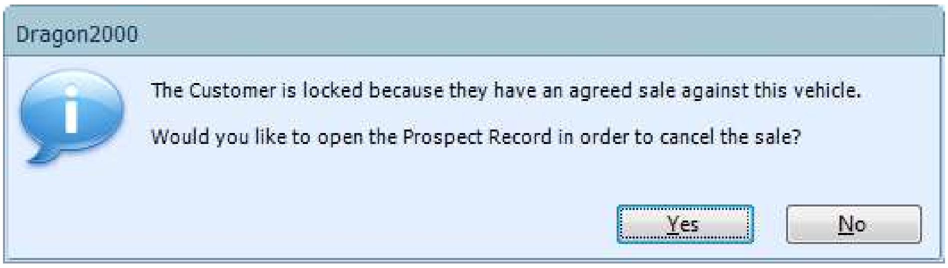
If you want to agree a deal, click on the Sale Agreed button within the enquiry record. The following message will pop up:

Select Yes, then choose the relevant deal (if you have more than one).

You will then get a message saying 'Successfully agreed sale'. The Vehicle Record will then open up so you can complete and invoice the deal. Any extras or costs added to the deal will automatically carry through to the vehicle record so you do not have to re-enter this information.

Un-applying a Deal from a Vehicle Record

If you need to remove a deal from a vehicle record, click on the customer tab from within the vehicle record and click on Clear.



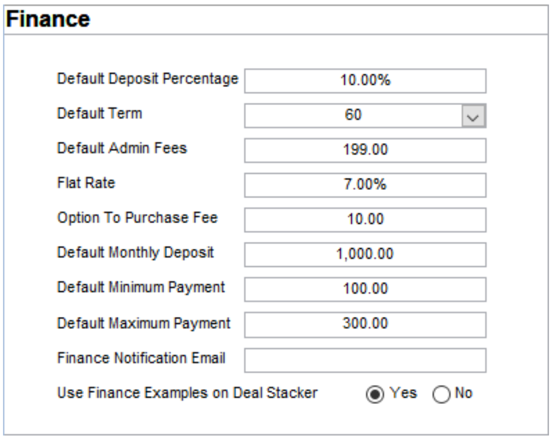
A message will popup advising that you can't remove the customer from the record, you must cancel the Sale from the enquiry record. Click on Yes to open the enquiry record and click Cancel Sale, then confirm by clicking Yes on the next message.
You will need to enter a reason for cancelling the sale. This will then remove the Prospect as the customer on the vehicle record and remove any of the items / changes that were applied from the deal.

Finance Calculator

The Finance Calculator allows you to quickly and easily calculate **representative finance examples** for a stock vehicle.

Default settings

From within Settings > Vehicle Sales > Finance you will see your default settings:



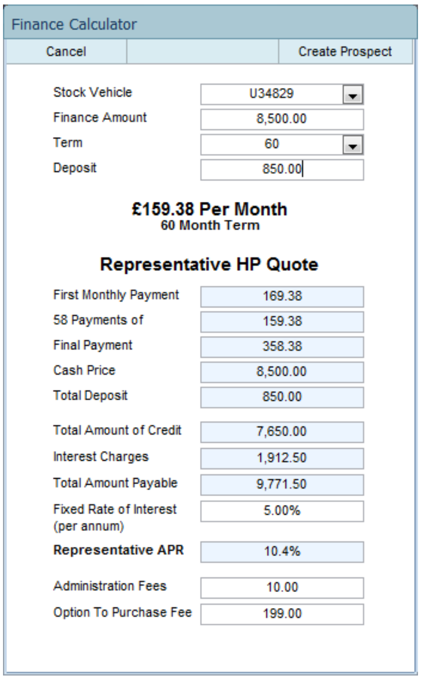
Here you can set the parameters used for all finance calculations in DragonDMS.

Creating a finance quote

The Finance Calculator can be found from New/Used Vehicles > Finance Calculator tab. The calculator will then open as follows:

Select the stock vehicle you wish to do the finance calculation on by using the dropdown list.

The Finance Amount will automatically populate to be the selling price of the vehicle you have chosen.



Term – select the term from the dropdown box

Deposit – enter the deposit amount

The Representative Hire Purchase quote will then be calculated based on the details entered.

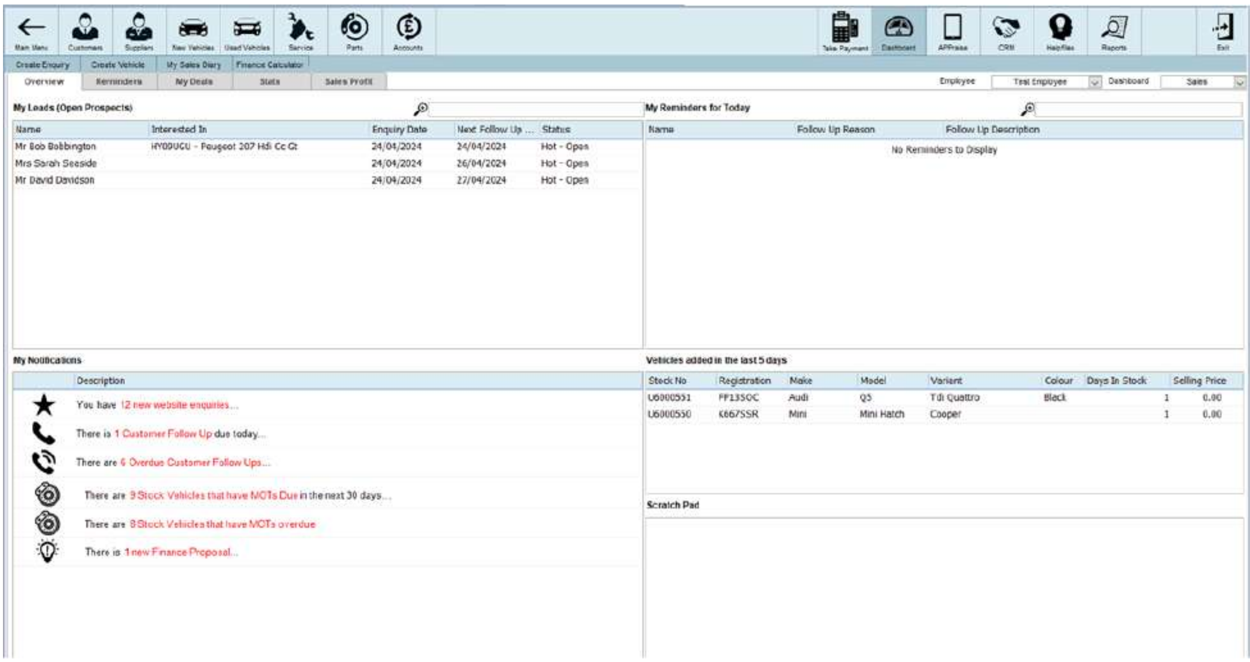
Click Create Prospect, complete the prospect's details and then you will be taken into the Deal Stacker and the finance information will be pulled through.

Dashboard - Managing your Prospects

The Dashboard has been designed as an area to show all of the key information to assist users to carry out their daily tasks.

Sales Dashboard Overview

For users with Management access, the dashboard overview will show details for all salespeople, for salespeople with no Management access the dashboard overview will only show Leads and Reminders for that user.



In Settings, the option is available to make the Dashboard the main home page when a user logs into Dragon. This feature will give a salesperson the immediate access to see their upcoming reminders for that day. This can be done from Settings > System > Employees > double click on the relevant employee and click on Other and tick the box 'Switch to Dashboard on login'.

My Open Leads

My Leads (Open Prospects)

Name	Interested In	Enquiry Date	Next Follow ...	Status
Mr Fred Jones	NONE - Mercedes-Benz C Class C230 ...	14/11/2024	27/01/2024	Sale Agreed - A...
Mr Harry Smith		09/10/2024	24/01/2024	Hot - Open
Mr T Smith	WJ10OFT - Porsche Panamera S Pdk,...	14/09/2024	24/01/2024	Hot - Open

This list will show you all of your active sales leads (open prospect records). Double clicking a lead in this list will open the prospect record on top of the Dashboard. When you close the prospect record, you will be taken back to the Dashboard.

For each prospect then Next follow-up due date is displayed. We would expect all open prospect records to have a follow-up in the future.

My Reminders for Today

My Reminders for Today

Name	Follow Up Reason	Follow Up Description
Miss Daisy Chain	Telephone	Call back re autotrader enquiry
Miss Sarah Jones	Telephone	call to go through finance quotes
Mr Bob Brown	Telephone	call re finance options
Mr Fred Flintstone	Telephone	Follow up for sales video re: U34791 AB14AMB, Cls...
Mr Harry Styles	Telephone	call re finance options

This list will show you any reminders that you have set for today, including any overdue reminders in red (these will show below todays reminders). Any overdue reminders will show in the list for 30 days. If they have still not been actioned after 30 days, they will be removed from this Reminders for Today list but will still show in your Open Leads.

Double clicking a reminder in this list will pop up the form that allows you to resolve the reminder then and there, without having to leave the Dashboard.

My Notifications

My Notifications

	Description
	There are 11 Customer Follow Ups due today...
	There are 2 Overdue Customer Follow Ups...
	You have 4 Stock Vehicles that may interest open Prospects...
	You have 3 Potential Part Exchanges that may interest open Prospects...

This list will show you all of your notifications such as how many customer follow ups are due for the day, how many vehicles match prospects requirements, how many pending website enquiries you have etc.

Scratch Pad

This area is a free type notes area. These notes will only be saved on the Scratch Pad for the user and not linked to any records such as contact records, follow ups or prospects etc.

Sales Dashboard Reminders

This screen will show you all of your reminders within a particular date range which you can select. You can also select from the dropdown box whether you want to see All Reminders, Test Drives, All Overdue Reminders or Resolved Reminders:

From the reminders tab, you are also able to create a follow up by clicking the Create Follow Up button on the right-hand side.

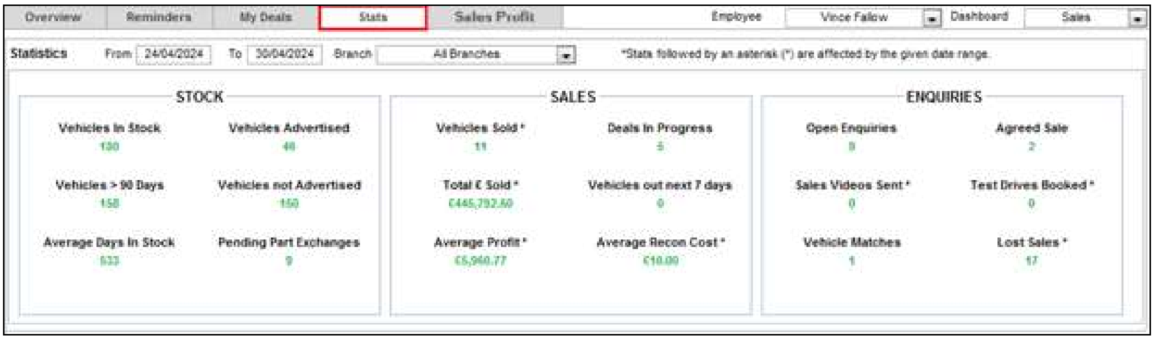
Once you have created and closed the follow up, you will be taken back to the Dashboard and the follow up will show in the Reminders list if it is within the set date range.

Sales Dashboard My Deals

This screen will show you two lists: Deals in Progress, and Completed Deals. You will only see deals where you are set as the Sales Executive on the vehicle record. Editing the From and To dates will only affect the Completed Deals list.

If you double click on a record in either list, it will open the car sales record on top of the Dashboard. You can then view/edit as required. When you close the record, you will be taken back to the Dashboard.

Sales Dashboard Stats



At the top of the Stats screen are a selection of statistics split into three areas: Stock, Sales and Enquiries. You can select a particular date range and select your branch (if you have more than one) or show statistics for all branches.

Statistics followed by an asterisk (*) are affected by the given date range.

The statistics each user can see is determined by the users Dashboard settings, these can be edited within Settings > System > Employees > double click on the relevant employee and then on the Dashboard tab. Some of the Statistics, such as Average Profit, will only be available to Managerial users.

The bottom of the Stats screen will list any reports that the user has marked as their Favourite reports

Sales Dashboard Sales Profit

The Sales Profit tab shows a brief breakdown of profit on all vehicles sold within the selected Date range.

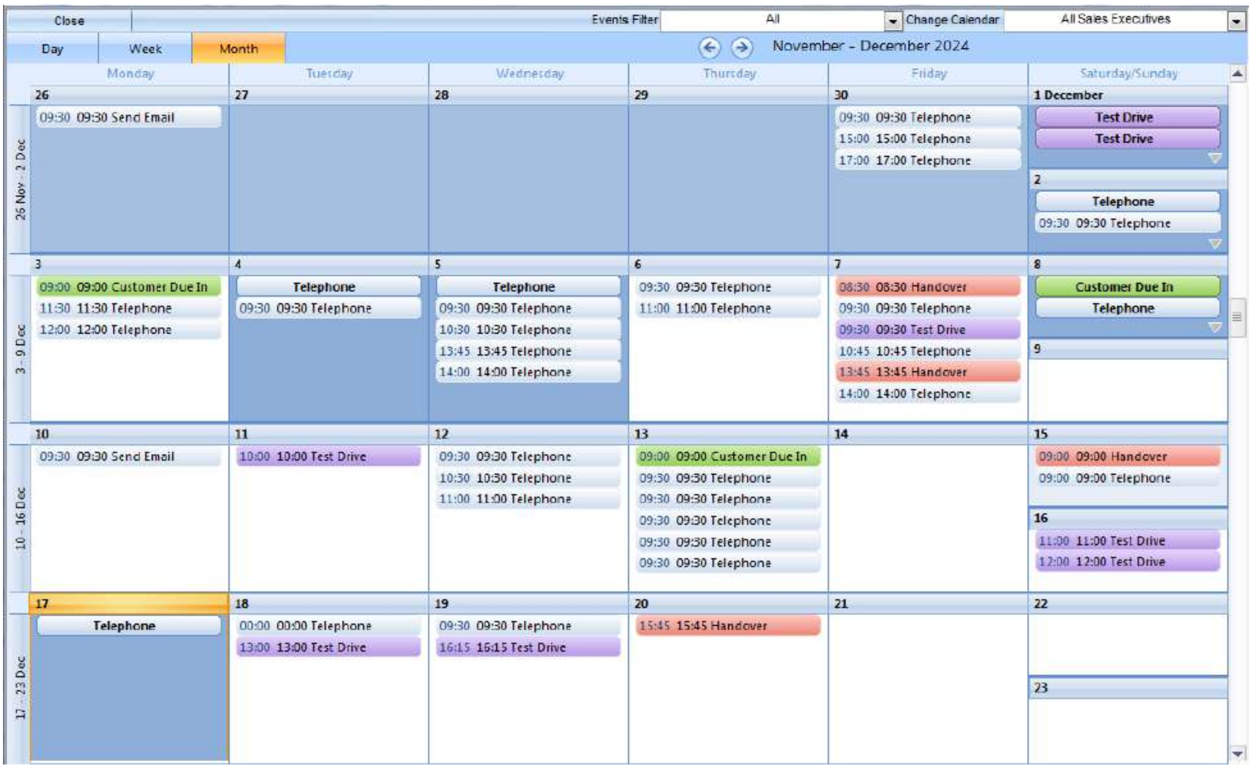
You can filter this by Supplier, Sale Type and Branch. Double clicking on a line will take you to the selected vehicle record to view the deal in more detail.

At the bottom right of the screen there is a button to Download CSV,.

Sales Executive Diary

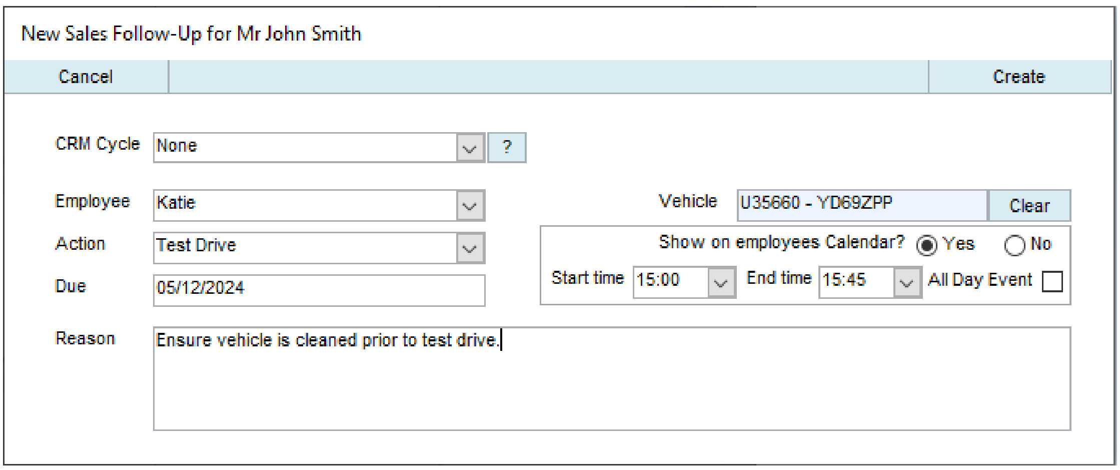
All of the events on your Personal Sales Diary can be viewed by going to Main Menu > CRM > Vehicle Sales > My Sales Diary. You can also access the Sales Diary from the Dashboard.

The diary will open to show your diary (i.e. based on your User Login Details). If you wish to view another person's diary, select their name from the Change Calendar dropdown list.



The Sales Diary can be configured in Settings > CRM > Settings > Sales Exec Diary Options. You can specify the working days of the week and the start and end of day time.

Events on the calendar can be moved by dragging and dropping to a new day if you are in the month view, or to a new time on the same day if you are in the week or day view. New events can be added directly onto the Calendar by double clicking on the day /time depending on the Calendar View you have selected. Search for the Prospect and then enter the event details.



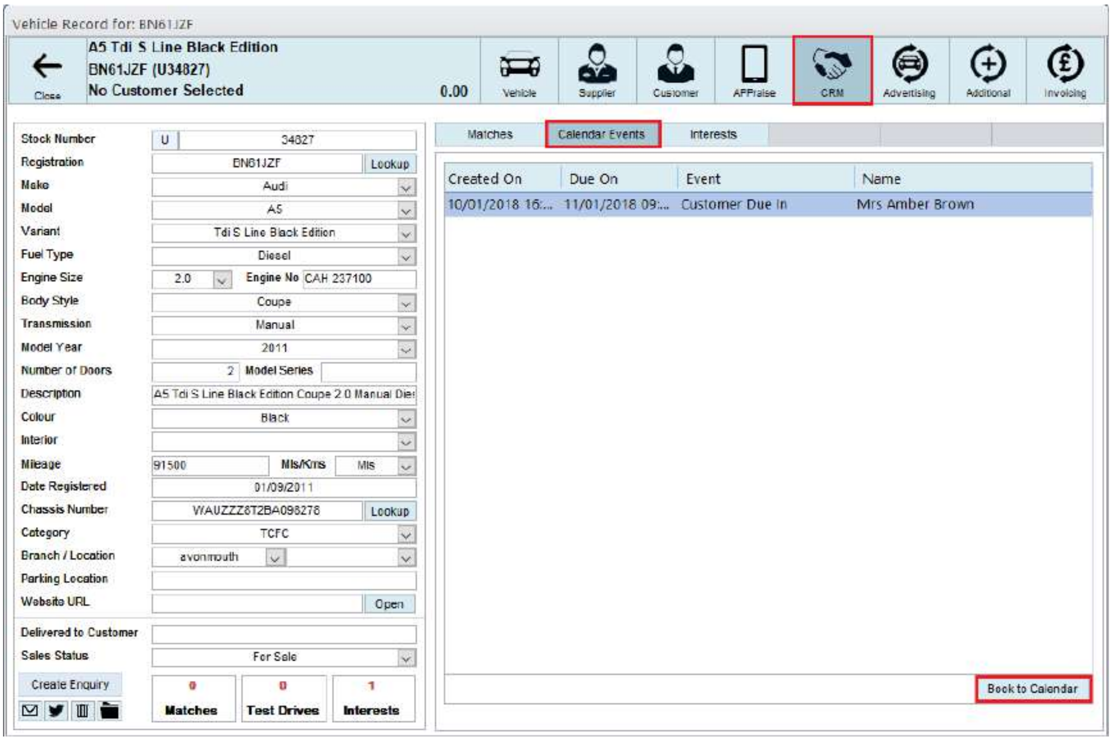
By default the For Who box will show your User, but you can change this from the dropdown list if you want the event to show in another Users' Sales Diary.

Creating Calendar Events for a Vehicle

There are a number of activities linked to a Vehicle Record like PDI dates and Test Drives that are handy to put in your diary. DragonDMS includes a Sales Diary which allows you to create Vehicle Activities from within a Vehicle Record.

From within the Vehicle Record go to CRM > Calendar Events. The list of Events is preset, however you can add New Custom Events by going to Settings on the main menu, then CRM > Settings.

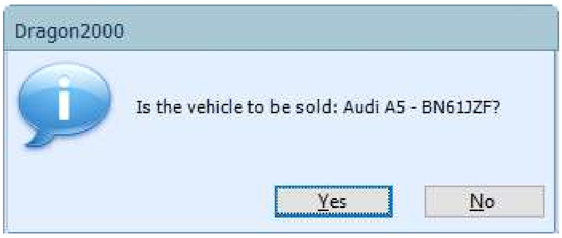
When you pick Test Drive or Customer Due In from the Vehicle Record you will need to add or create a new Contact for that record detailing the Prospect who is coming in.



Sales Process - Selling a Vehicle

Converting a Prospective Customer

Go to the CRM module and search for the Prospect to open their Prospect Contact Record and click on Sale Agreed. If there is already a vehicle interest logged, you will be asked if that is the vehicle to be sold. If it is not, click no and search for the correct vehicle.



If the Prospect has any Current Vehicles logged then a message will be displayed asking if you want to use any of the vehicles as Part Exchanges on the deal.

Clicking Yes will then allow you to select which vehicles to add. You can select up to 3 vehicles as Part Exchanges on a single deal.

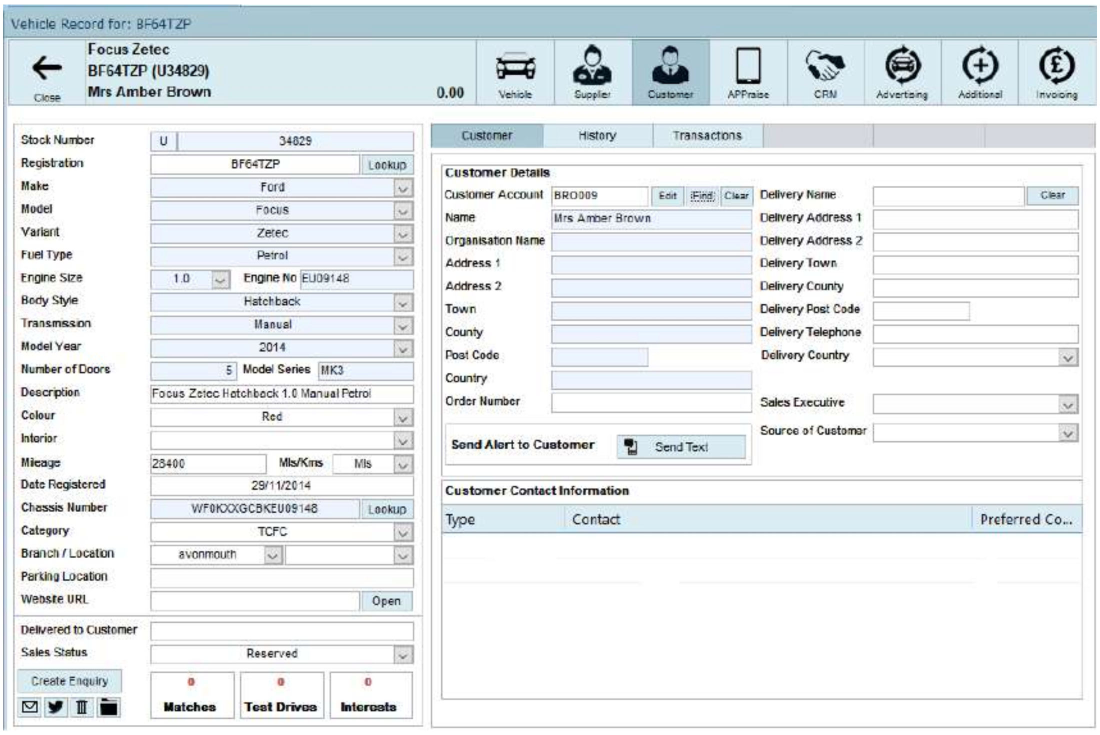
DragonDMS will convert the Prospect to a Customer, reserve the vehicle against the Customer and create a contact log against their Customer Record.

Lost Sale

In the event that a Prospect is no longer interested in being contacted, you can mark their Prospect Record as a Lost Sale. Open the Prospect Record and click on the Lost Sale icon at the top right of the screen. A reason for the Lost Sale is required to complete this action.

Adding an Existing Customer

In the Vehicle Record click the Customer icon and use the Find button to search for the Customer using any part of their name or address and select Customer from the drop down list. If you choose not to use the prospecting tools you can add a new Customer directly by clicking on the New button.

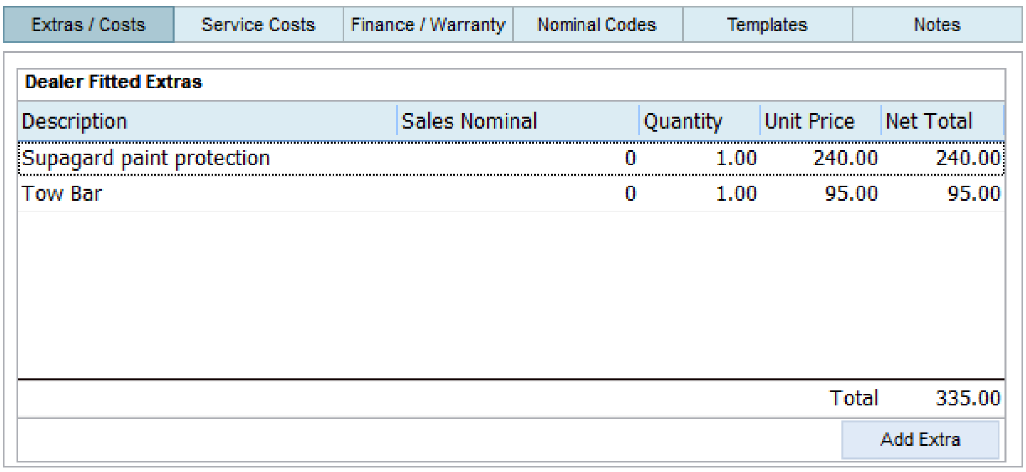


If you are interested in reporting on Sales by Salesperson, or where your Customer's have heard about you, make sure that you enter the Sales Executive and the Source of the Customer.

Adding Vehicle Extras

An Extra can be any item that you want to list on the sales invoice. Parts and oils setup in your system can be added as Extras.

From within the Vehicle Record select Additional > Extras/Costs. All of the extras on a vehicle will be listed here.

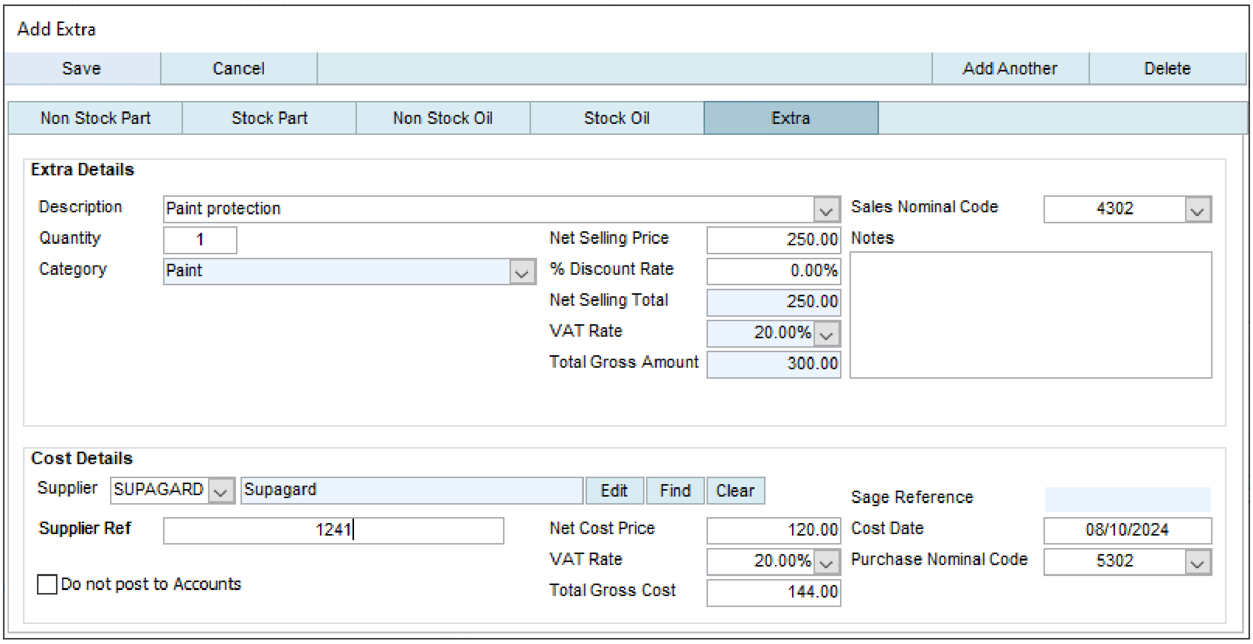


Extras can be added by clicking on the Add Extra button.

This will default to adding an Extra, but you can also select Non Stock Oil, Stock Oil, Non Stock Part or Stock Part.

Enter the description or select from the dropdown list of saved Extras, enter the net selling price.

If you have more than one extra to add then click the Add Another button.



Multiple Extras can be added to the list of extras via the Extras menu within the used & new Vehicle Modules.

If you are adding an Extra to a Margin Vehicle there will be no VAT as the value of the Extra is part of the single supply of the vehicle as per the conditions or the Margin VAT scheme. For more information on this please see our online article.

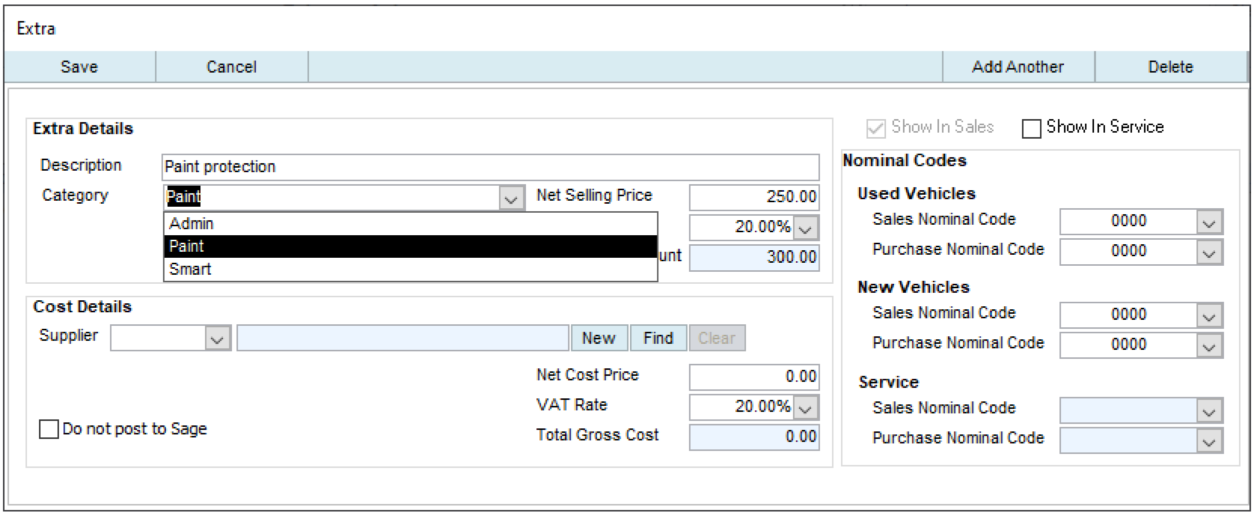
If you have incurred a cost for the extra you can enter the details of the cost into the section at the bottom of the screen. These details will be posted to Sage if you are using the Sage Integration and have selected costs to be posted.

Extras Categories

Extras can be grouped into categories, this can be useful when reporting of types of extras that have been sold.

To setup an extras category go to Settings > Vehicle Sales > Invoice > Extras Categories and click New Category. Enter a name and click Save.

If you have any saved extras that you want to add to a category then exit Settings and go to Used Vehicles module, click on Extras, double click on a saved extra and select the Extras category from the dropdown list and Save.



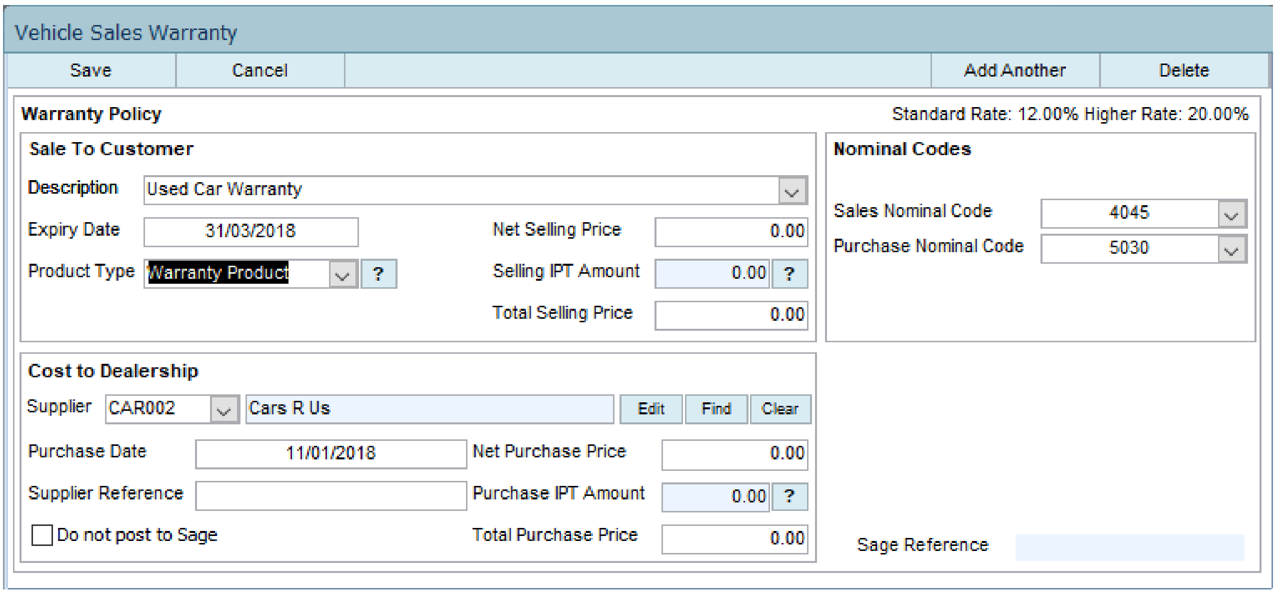
Adding Warranties

From the Vehicle Record go to Additional > Finance / Warranty.

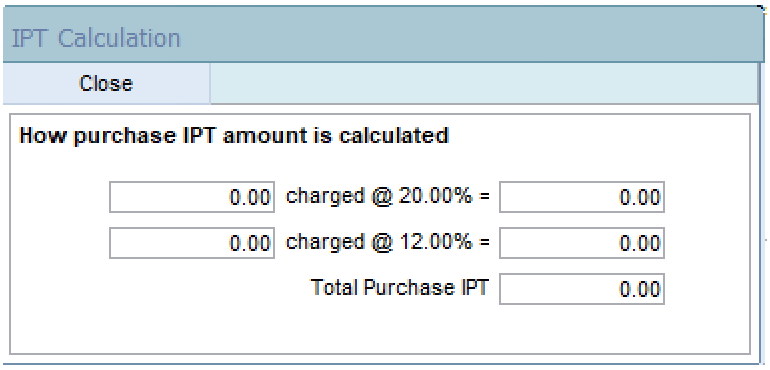
You can add as many Warranty Products as required. To add a Warranty select either Add IPT Warranty or Add Non IPT Warranty.

To edit or change a Warranty simply double click on the correct Warranty. This will open a new screen where you will be able to edit, delete or select a new Warranty from a dropdown list.

When you add an IPT Warranty you must select the Warranty from the Description dropdown list, and check the Product Type. The Product Type determines the rate of IPT applied, if in doubt click on the ? button and this will explain the different Product Types.



When the Net Selling Price and Net Purchase Price is added, the IPT is automatically calculated. Click on the ? button next to the IPT amount to see details of the IPT Calculation.

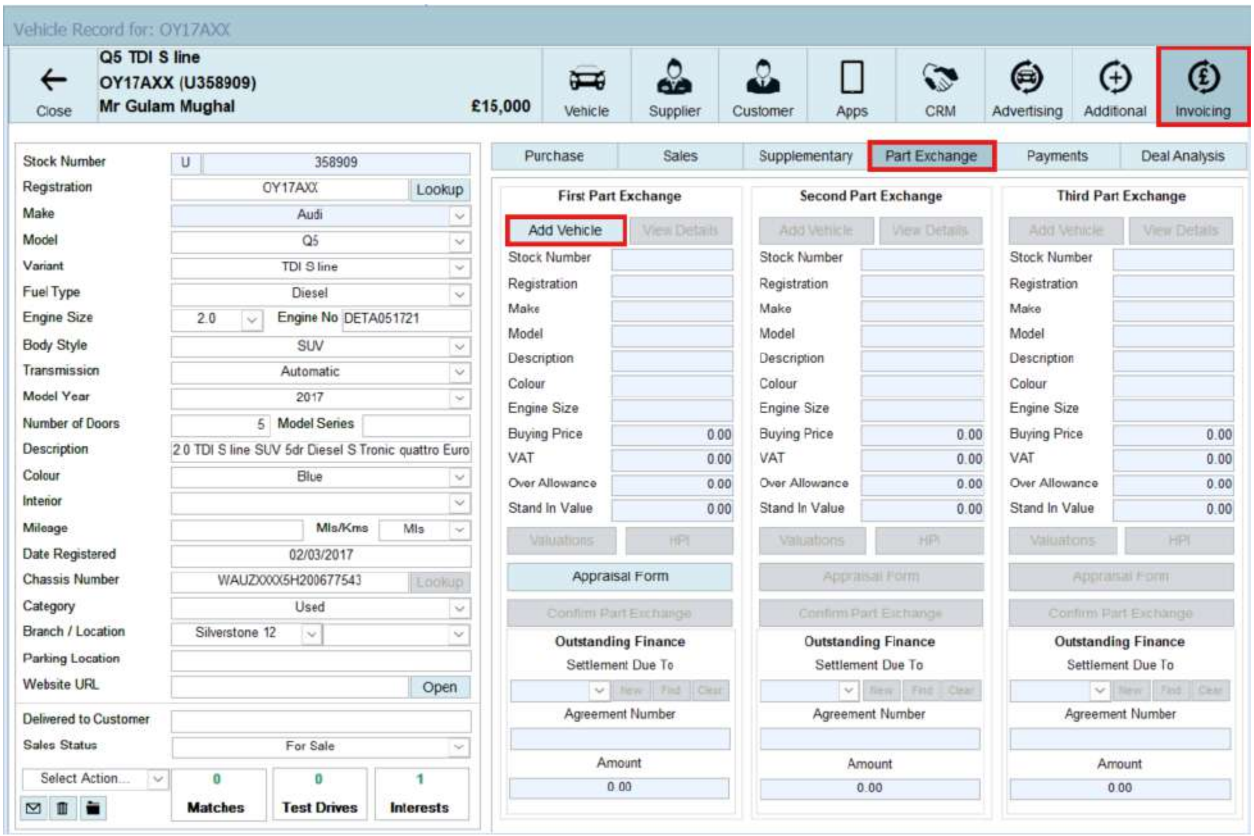


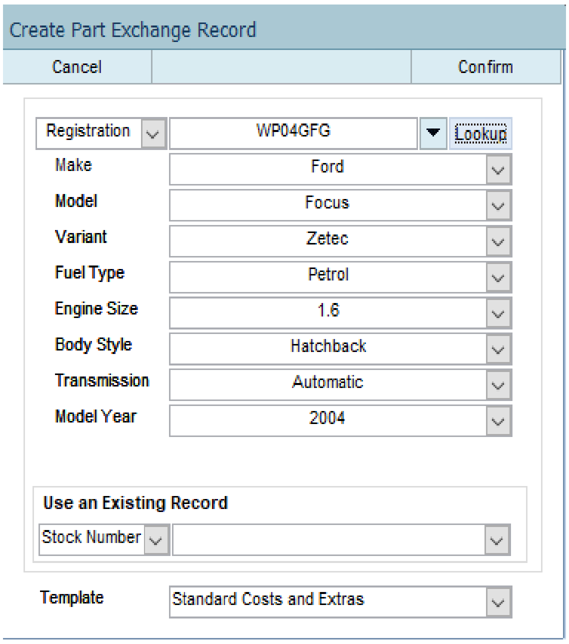
For additional information on IPT please refer to Appendix 2 at the end of this manual.

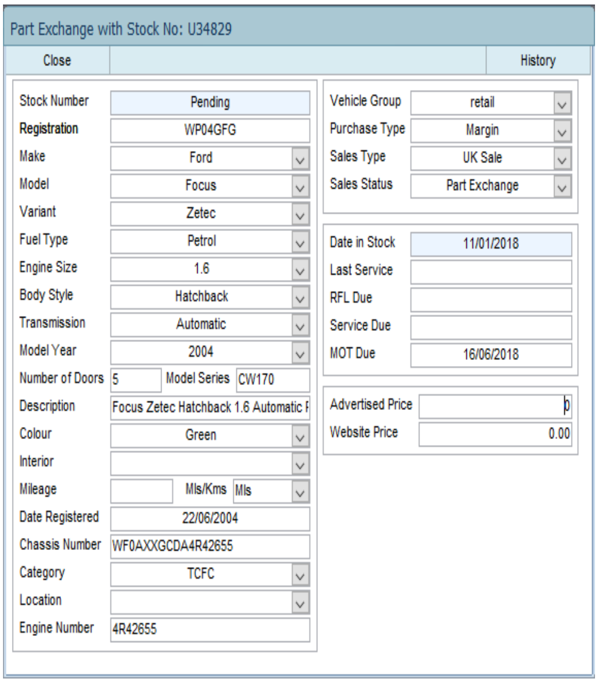
Adding Part Exchanges

To add a Part Exchange to a Vehicle Record click Invoicing > Part Exchange > Add Vehicle.

Up to 3 Part Exchange Vehicles can be added to the sale of a single vehicle. When adding a Part Exchange Vehicle you have the option of creating a New Record or using an Existing Record.



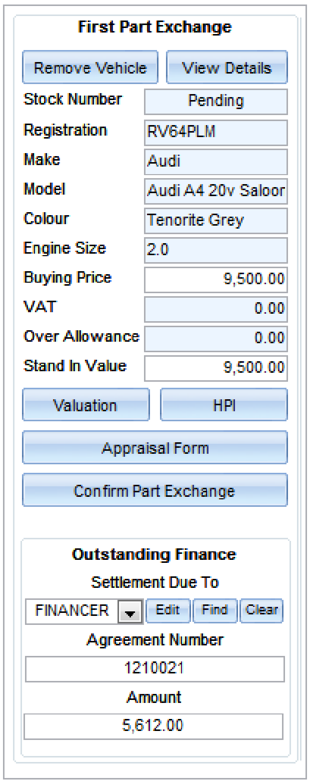




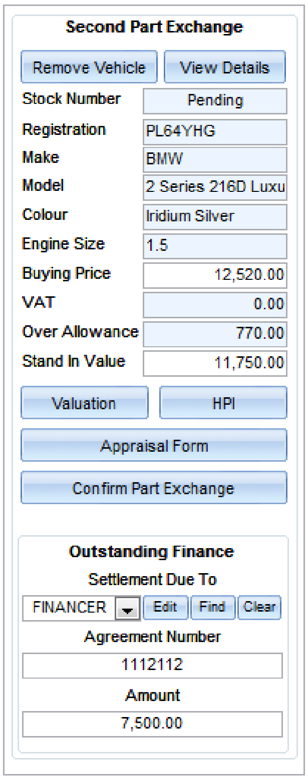
Enter as much information as possible detailing if the vehicle is a Qualifying or a Commercial Vehicle. You will need to edit the Purchase Type on this screen to ensure the correct VAT is applied.

Part Exchange Settlements

Details of Outstanding Finance on Part Exchanged Vehicles can be added below the Part Exchange Details.



PX with no over allowance



PX with over allowance

The Amount Outstanding will be added to the Sales Figure of the Deal which can be viewed on the Invoicing Sales screen.

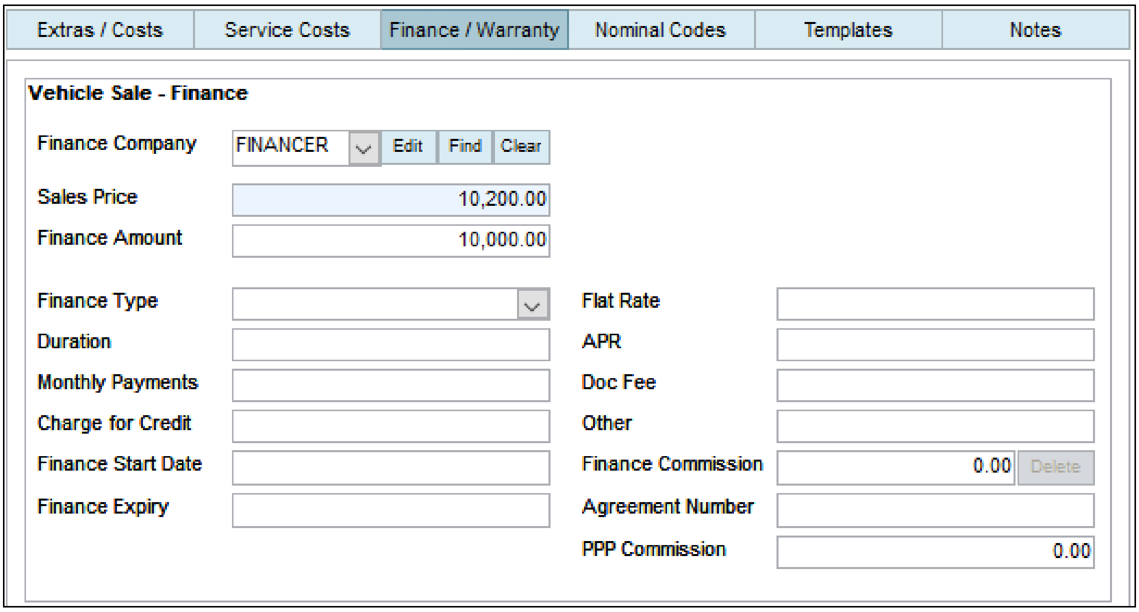
To add an Over Allowance to a Part Exchange, enter the amount you wish to give the Customer for the vehicle into the Buying Price. DragonDMS will automatically enter this as the Stand in Value. You should then edit the Stand in Value to reflect the actual value of the vehicle. DragonDMS will then show the difference as the Over Allowance. Adding an over allowance is generally not tax efficient on margin scheme vehicles.

The value of the Over Allowance will be added to the Total Expenditure on the Deal which you can see on the Deal Analysis screen.

Adding Vehicle Finance

Go to Additional > Finance / Warranty

Use the Find button to search for existing Finance Companies, or if the Company is not already setup in DragonDMS click on the New button and add their details.



Enter the Finance Details. If you do not know the value of the Commission you can leave this blank as you can go back and add this information at any time, even if the Sales Invoice has been printed.

By adding the finance expiry date you can then contact the Customer when their finance is due to finish and see if they are interested in purchasing another vehicle.

The Finance Amount will be deducted from the Sales Figure of the Deal which can be viewed on the Invoicing Sales screen.

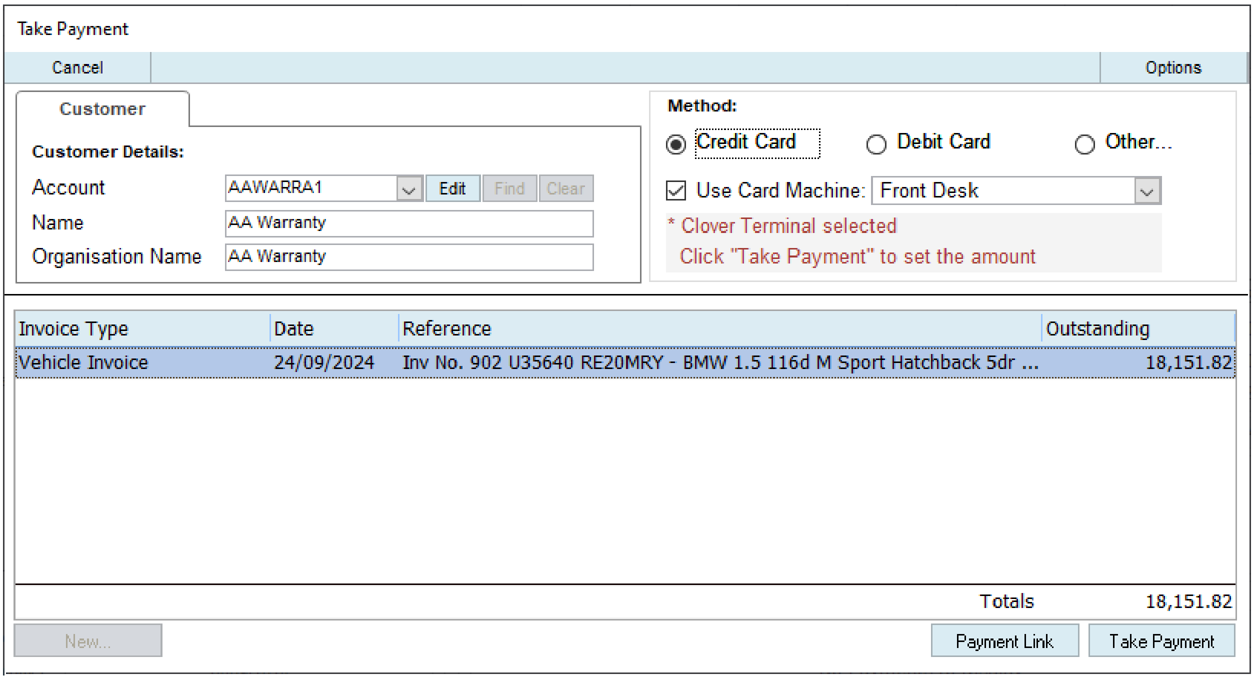
Vehicle Payments/Deposits

Go to Invoicing > Payments. DragonDMS gives you the option to record Customer Deposits and Payments against a vehicle. A Customer must be selected before you can add any Deposits or Payments.

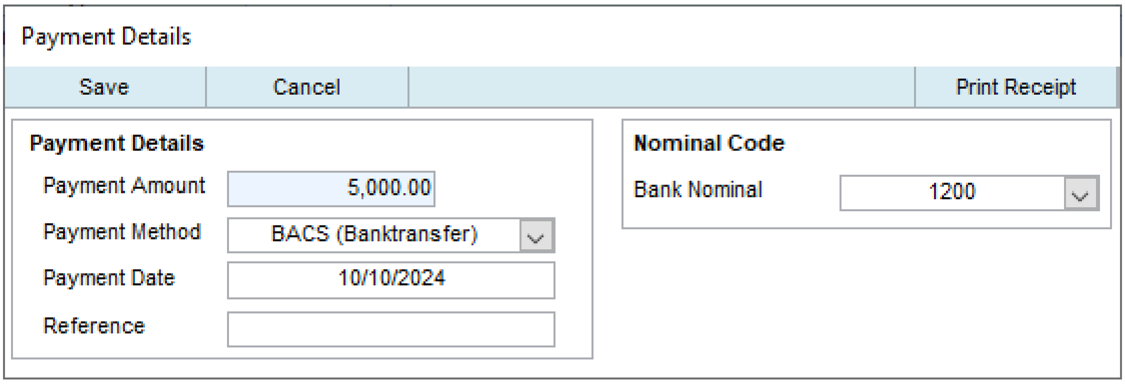
Payments added prior to the Sales Invoice being printed will be logged as Deposits. Payments added after the Sales Invoice has been printed are Balance Payments.

The Balance Outstanding will update as additional payments are added.

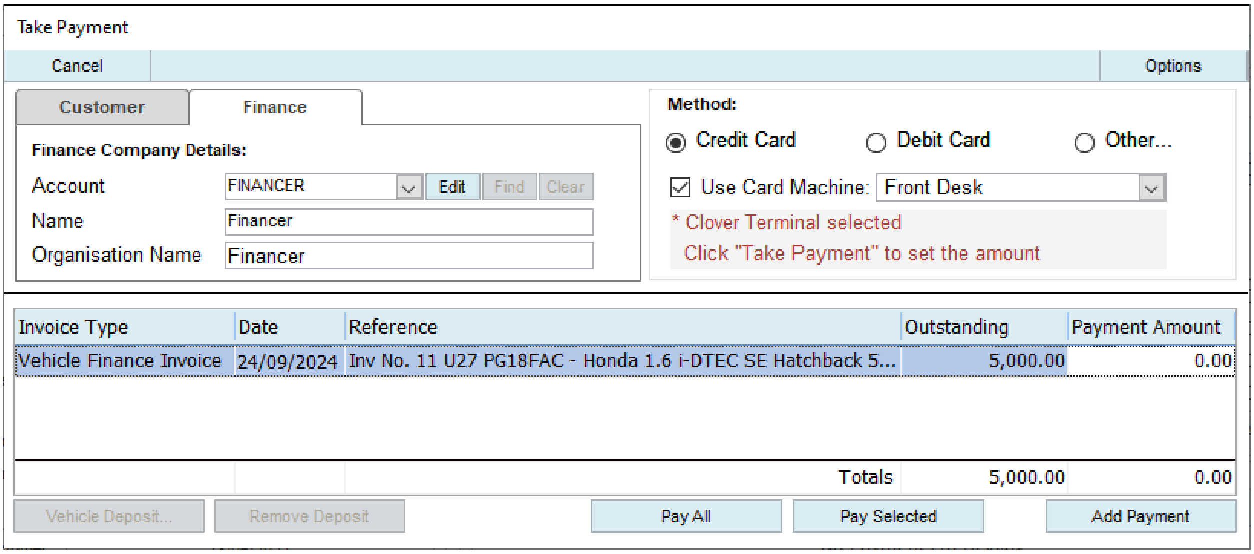
Enter the Payment Amount and click Add Payment.



Select the payment method and enter a reference number if applicable. There is also an option to print a receipt of the payment. Click Save once you have entered all the details.



If finance has been added to the vehicle record, then you will have the option to add finance payments.
Click on the Finance tab, enter the payment amount and click Add Payment.



The list of Payment Methods can be edited in Settings > System > Payments**.** From here you can decide which of the Default Payment Methods you wish to display. You can also select Default Nominal Codes by Payment Method.

Refunding Deposits

To refund a Deposit double click on the Deposit and click the Refund Button. All Refunds will be logged on the Payments Screen.

In instances where a Deposit has been taken and the deal has not proceeded, the original Deposit must be refunded before you can enter the details of another Customer.

Refunded Payments

Reference	Template Name	Date	Type	Payment Method	Total	VAT Element
1341	Mrs Amber Bro...	10/10/2024	Deposit	Debit Card	2,000.00	0.00

Balance payments can only be refunded if the sales invoice has been credited.

Order Form

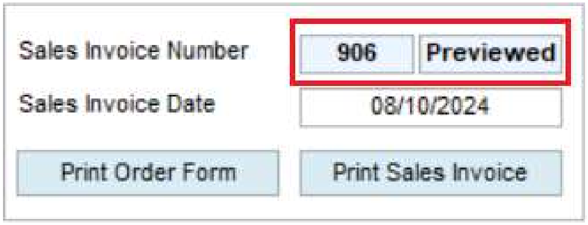
Go to Invoicing > Sales

The Print Order Form option can be used as a Proforma Invoice; it is good practice to print this off and proof the Deal prior to the printing the Sales Invoice. To print the Order Form go to Invoicing > Sales > Print Order Form. The Order Form can be printed off as many times as needed without locking the Deal allowing any changes to be made.

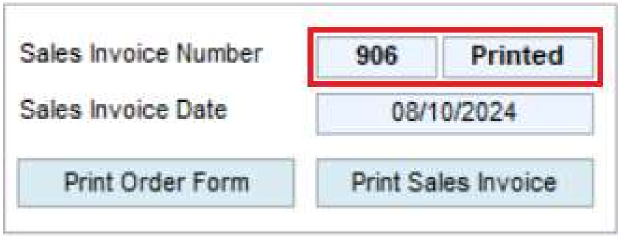
Sales Invoice

Go to Invoicing > Sales

Click the Print Sales Invoice button to preview the Sales Invoice. If you close the preview without printing, the deal will remain open allowing you to make changes if required. At this point DragonDMS allocates the next available invoice number and it will indicate the invoice has been Previewed.



If you Print the invoice, email or save it as a PDF, the Deal will automatically be locked. DragonDMS will indicate the invoice has now been Printed.



The only changes that can be made to the Deal after the Sales Invoice has been printed are:

- Adding Additional Costs that you have incurred
- Adding Finance Commission
- Adding Balance Payments

If you need to change any of the details of the sale, you will need to print a Credit Note and re-print the Sales Invoice.

Printing Invoices and Credit notes can be restricted to specific Users. Only Users with Management Privileges for Sales/Purchase Invoice and Credits enabled will be able to print Invoices and Credit notes. Employees' User Rights can be viewed by going to Settings > System > Employees > Access Rights.

Credit Notes

Go to Invoicing > Sales

Click the Raise Credit button. A pop-up box will be shown asking you to select one of the following options for the Sales Credit Date:

- Use Today's Date
- Use Original Invoice Date
- Use Another Date

To finalise the Credit you will need to **print** the Credit Note. This will unlock the vehicle record to allow for changes to be made.

Transaction History

The full Purchase and Sales Invoice history is stored in the vehicle record.

To view Purchase Invoices that have been credited go to Supplier > Transactions.

Customer | History | Transactions

Type	Reference	Date	Customer
Invoice	905	02/10/2024	Mr James Martin

Double click on the Invoice / Credit Note to view in full and to re-print. If you want to re-print a current Purchase Invoice go to Invoicing > Purchase.

To view Sales Invoices that have been credited go to Customer > Transactions.

Customer | History | Transactions

Type	Reference	Date	Customer
Invoice	907	02/10/2024	Mr James Martin
Invoice	905	02/10/2024	Mr James Martin
Credit	169	02/10/2024	Mr James Martin

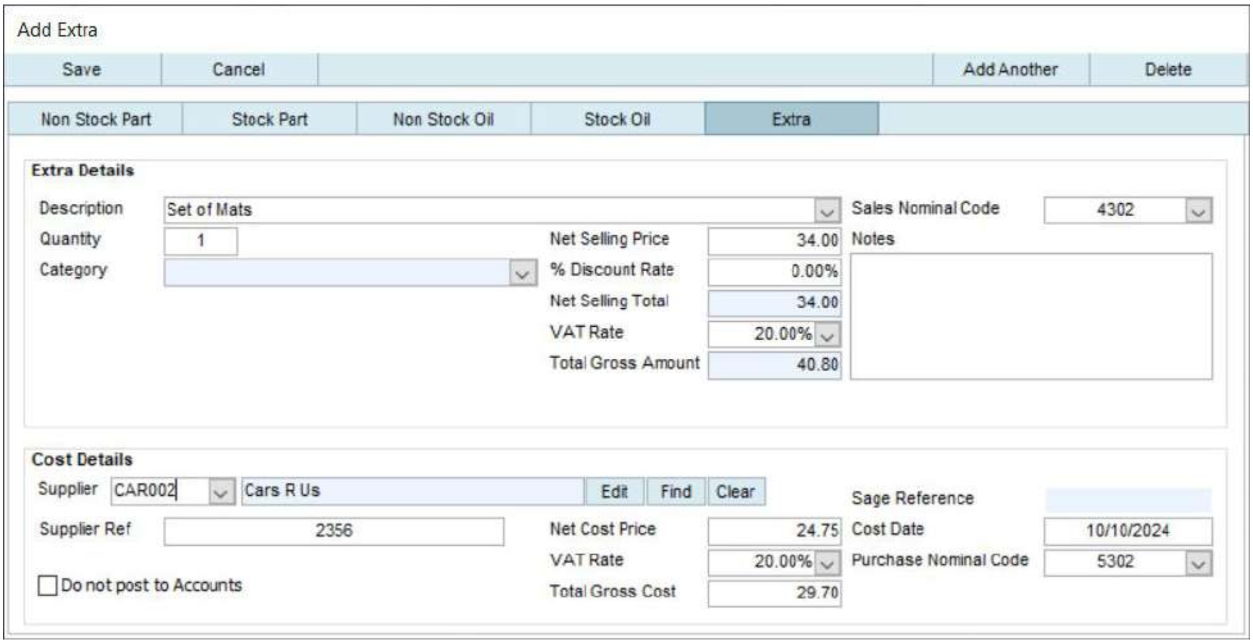
Double click on the Invoice / Credit Note to view in full and to re-print, If you want to re-print a current Sales Invoice go to Invoicing > Sales.

Supplementary Invoices

There may be occasions where you wish to invoice Additional Services / Products to a Customer after the Sales Invoice has been printed. Supplementary Invoices allow you to do this.

Go to Invoicing > Supplementary.

Click on Create New and enter the details of the Product / Service that you wish to invoice. If you have incurred a Cost you can add this at the bottom of the Details Screen.



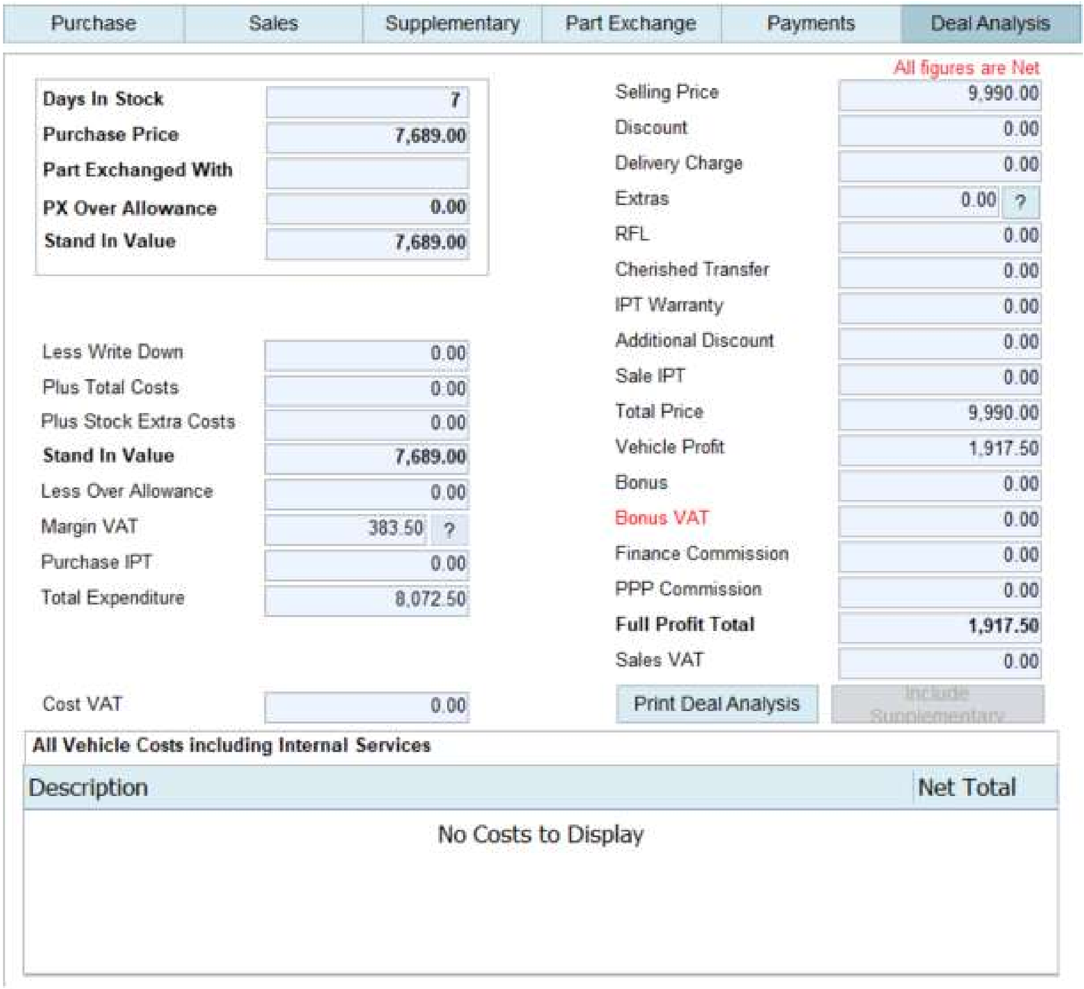
Supplementary Invoices cannot be printed before the Vehicle Sales Invoice has been printed.

Deal Analysis

Go to Invoicing > Deal Analysis

The Deal Analysis screen is designed to display all of the commercial information about the vehicle in one place, specifically to show you the current vehicle profit. The figures on this screen update as you add items or edit the deal.

The Deal Analysis screen will not be visible to users who have the permission 'hide purchase' set on their User Account.



If the vehicle is being sold under the Margin VAT scheme, the Margin VAT is calculated for you on this screen. Click on the ? button next to Margin VAT to see details of the Margin VAT Calculation.

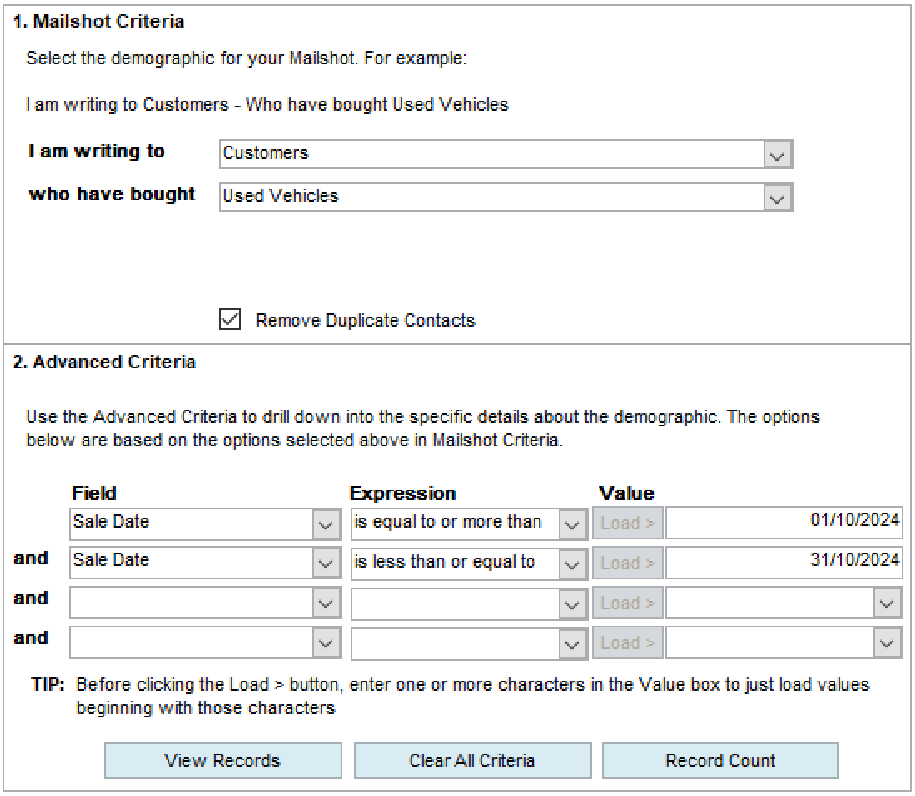
Mailshots

The Mailshot Tool allows you send bulk letters, emails or text messages to specific groups of Customers, Suppliers and Prospects, making it even easier to keep in touch with your contacts. Ideal for sending post sale follow up letters, reminders about Finance or Warranty expiry dates.

To create a mailshot go to CRM > Custom Mailshot

Step one: Decide who you wish to contact

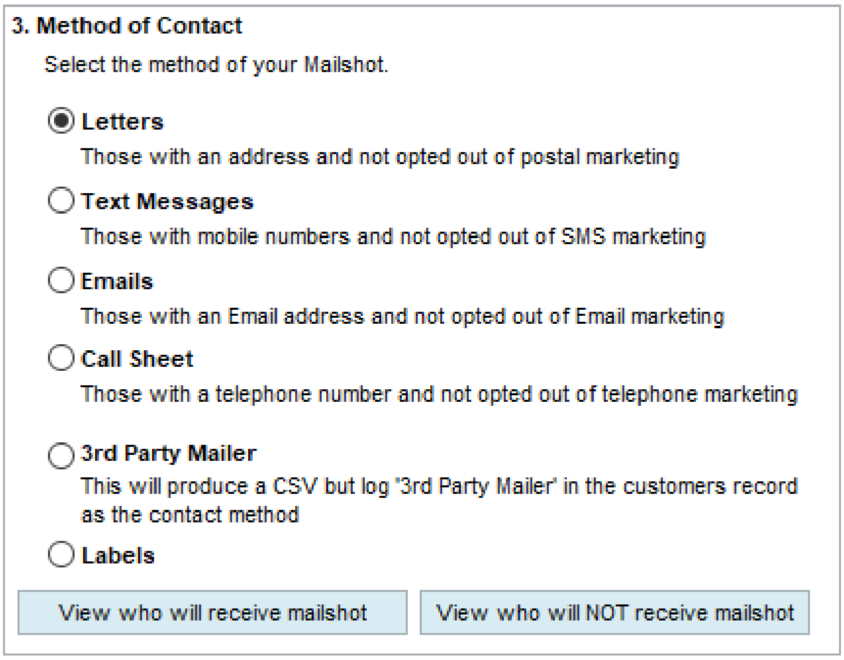
Select New and use the Mailshot Criteria to select the group of people that you want to contact. Use the Advanced Criteria to narrow this down to a specific group. I.e. Customers who bought a vehicle in the last 2 weeks.



Use the Record Count button to see how many contacts will be in your mailshot group. If you want to see the details of these contacts click on the View Records button. When you view the results there is an option to export the results to CSV.

Step two: Decide how you want to contact them

You can create letters, text messages, emails, call sheets or labels. Depending on the contact method you choose, DragonDMS will check the contacts and will then only use contacts that have the relevant contact details, for example if you choose email, DragonDMS will only try and send the email to those contacts that have an email address.



TEXT MESSAGES – You will need to purchase text credits from Dragon2000 to use this feature.

EMAILS – Dragon2000 sends your emails through Microsoft Outlook so you must have Outlook installed on your computer and Outlook must be open to send emails.

All emails will automatically have a line of the bottom of the email stating: 'To unsubscribe, please reply with "Unsubscribe"'.

Step 3: Decide what you want to say to them

To make the most of the mailshot tool you should try and personalise the message that you are sending to your contacts.

The level of personalisation is dependent on the contact method. Letters will give the greatest personalisation but is also the most expensive when you add in stationary, printing and postage costs.
However if you wish to email or text your contacts you need to make sure that you are capturing this data for all of your contacts and getting their consent.

When you send / print a mailshot from DragonDMS a contact log is automatically added to each of the Customer/ supplier records that received the mailshot.

Description	Activity Date	Details	Follow up Date	Completed
Text Message sent for Custom Mailshot by Maria Craig	24/08/2024 10:12:40	Hi Miss Daisy Dukes, We hope you are enjoying your Hyundai Accent. If you have any queries please call us on 0111 222 333	N/A	Sent

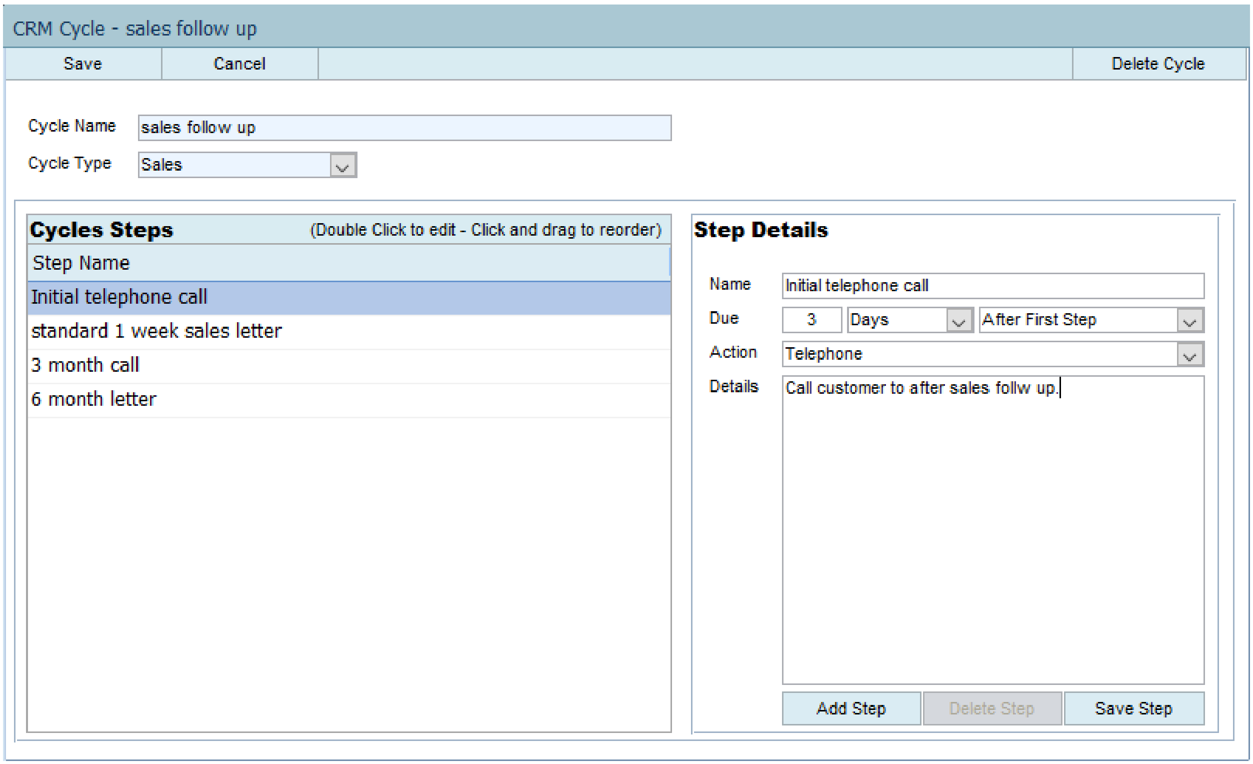
CRM Cycles

CRM Cycles are designed to be a list of pre-set Follow Ups (cycle steps), each of which is automatically created when the previous step is marked as resolved.

How to create a CRM Cycle

From the Main Menu go to Settings > CRM > CRM Cycle and click on New CRM Cycle.

Enter a Cycle Name and select a Cycle Type (this can be either Sales or Service).



The cycle is then made up of a number of steps, with each step used to create an automated follow up.

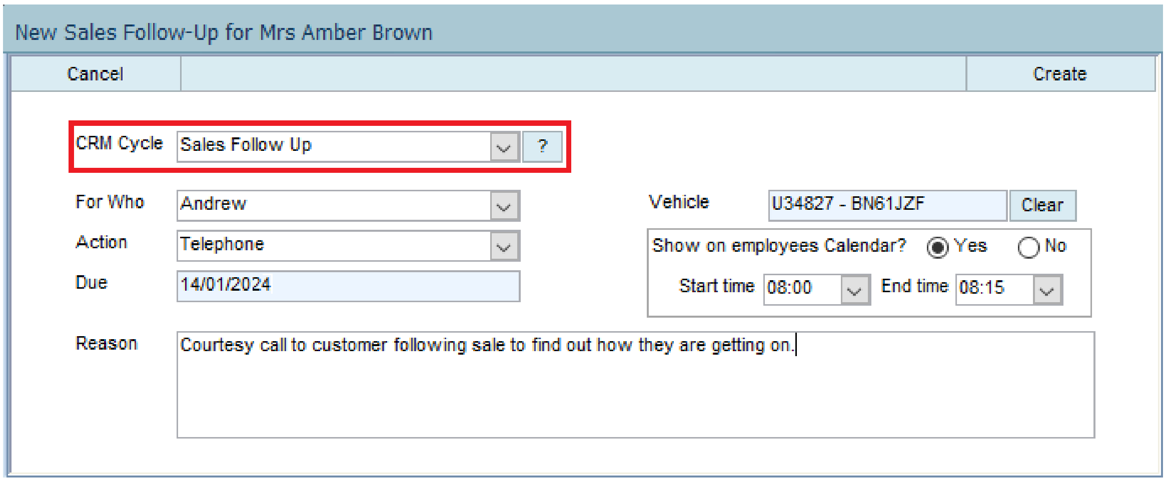
Click on Add Step. In the Step Details section enter the Name for the step and then define how to calculate the Due Date when this follow up is created. There is a choice of a number of days or months, or a choice of 'After First Step' or 'After Previous Step' depending on what you need to reference.

The Action is to define the type of follow up to be created i.e. Send Letter. Enter any details and these will be copied to the follow up when it is created.

You can have an unlimited number of steps within a CRM cycle.

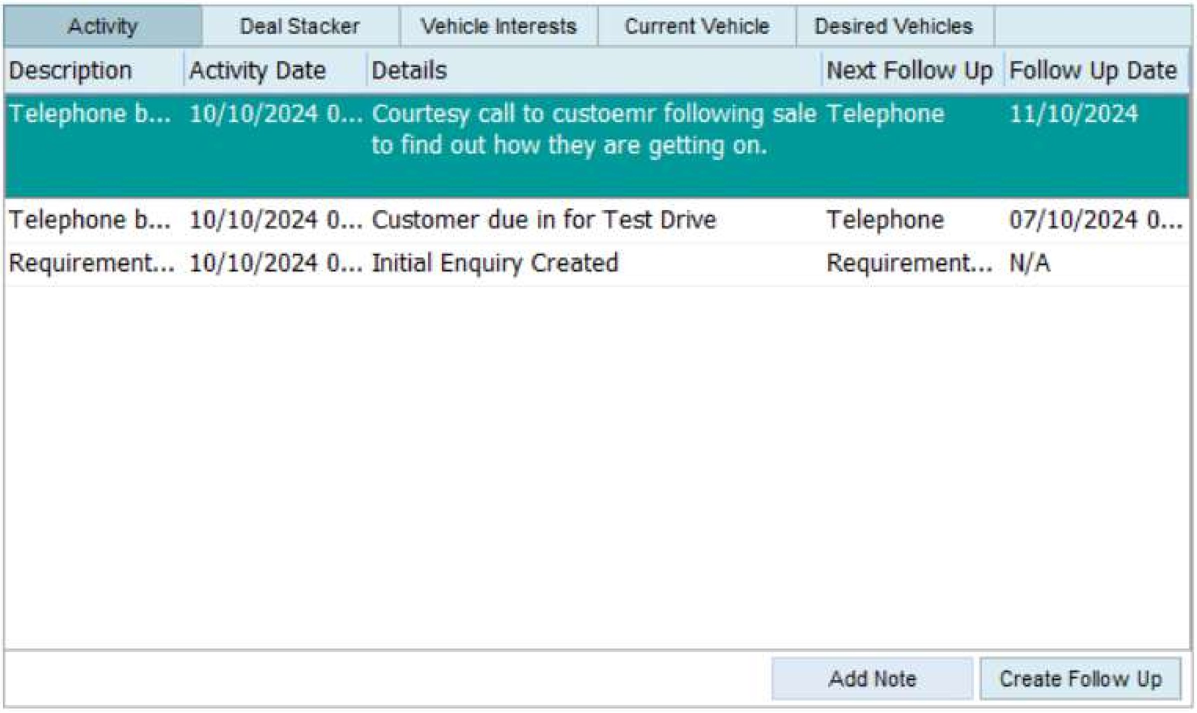
How to add a CRM Cycle to a follow up

When creating a follow up on a Customer or Prospect Record you will now have the option to select a CRM Cycle.



By selecting a CRM cycle, the details from the first step are used to create the first follow up.

The follow up will show in the list of Customer correspondence, with all follow ups that are not resolved showing in Turquoise.



Resolving the follow up will automatically create a new follow up based on the settings on the next step in the CRM cycle. Open the first follow up, enter the resolution details and click on Complete.

The next follow up will be displayed. Click on Create to continue.

Only users with the relevant permissions will have the right to end a CRM Cycle (this can be set on their employee record – Settings > System > Employees > Employee Details > Access Rights > Other and tick Can edit CRM Follow ups and end CRM Cycles.

Reports

Go to Main Menu > Reports

The Reports that are displayed are controlled by the level of access given to the User. To view all reports the User must have access to Management Reports.

Report Filters

Select the Report you want to run and double click. The Report Criteria will be displayed. The details on this screen will change depending on which Report you are running. Generally, you can enter the date range that you wish to report on.

The Fields options allows you to add Criteria to filter the report data. You can add more filters by clicking on the Add Criteria Row button. You can also decide if you wish the additional filters to be 'AND' (a filter in addition to the other filters) or an 'OR' (a filter that either meets one of the filters or the others).

Report filters can be saved and re-used for future reporting. Click on the Save button and give your filters a name. The next time you want to run the same report, use the Saved Filters drop down list to select your saved filters.

Click Preview to view the Report. Once the Report is on the screen you can view each of the pages (if there are more than one) by clicking on the arrow next to the page number at the bottom left of the screen. To zoom in and out of the Report simply click the mouse on the Report pages.

Printing Reports

To print the Report click the Print Options button at the top left of the screen. You can choose to print, email (If you use Microsoft Outlook) or PDF the Report. If you do not wish to print the Report at this time then click the Close Print Preview button to return to the Reports Menu.

To export select either Word or Text Data Export.

Most Popular – Standard Reports

Vehicle Stock

- Stock Report – Shows basic details of all vehicles currently in stock.
- Pictorial Stock List - Columns – Two column format, showing Selling Price (before Extras and Warranties etc.) including VAT where appropriate.
- Retail Stock List - Two column format, includes basic Selling Price (before Extras and Warranties etc.) including VAT where appropriate.

Vehicle Sales

- Sales Report – Customer Details - Shows details of Sales between two given dates, giving details of the Customer.

Vehicle Admin

- Vehicle MOT Expiry Dates - Stock - Shows a list of stock vehicles due for their MOT within the specified date range.
- Vehicle RFL Expiry Dates - Stock - Shows a list of stock vehicles with expiring Road Fund Licenses within a specific date range.
- Deleted Vehicles - Shows details of all Deleted Vehicles.

Used Vehicle CRM

- Activity Sheet - All Activity Records created for each Contact between the given dates.
- Salesperson Activity Overview - Overview of the number of Activities, Follow Ups and Enquiries each salesperson has completed between the given dates.
- Enquiries - Lost Sale - Shows details of all enquiries marked as Lost Sale between the given dates.
- Enquiries - Converted to Sales - Shows details of all enquiries which have been converted to Sales between the given dates.
- Follow Ups Overdue - Shows details of all Follow ups which are overdue.

Most Popular – Management Reports

Vehicle Stock

- Stock Report – Shows basic details of all vehicles currently in stock.

- Stock Report – Management Inc. Chassis No. – Full stock report including management figures. Include Chassis Number.

- Stock Report - Management - Full stock report including management figures.

- Stock Report Historical - Stock list on a given date – including vehicles sold on that date. Purchase invoice must be printed**.**

- Stock Report – Funding – list of vehicles in stock grouped by funder showing funding total and days remaining.

Vehicle Purchases

- Vehicle Purchases - All vehicles purchased between two dates. Excludes Credited Invoices.

- Purchase Credit Log – All vehicle purchase credit notes logged between two given dates. Only shows those that have printed.

- Costs Summary - Shows all Costs allocated between two dates.

Vehicle Sales

- Vehicle Sales - All Vehicles which have been allocated an Invoice Number, between two given dates. Excludes Credited Invoices.

- Sales Report - Shows details of Sales between two given dates. This report is the main management reporting tool and can be sorted or filtered to show many different combinations of data.

- Credit Notes – Sales - Log of all vehicle sales credit notes printed by the system between two given dates.

- Deal Analysis - Enter Stock Number to show a full break down of an individual sale.

- Sold Vehicles with O/S Balance – Shows all vehicles invoices between two dates that have an outstanding balance.

Vehicle General Admin

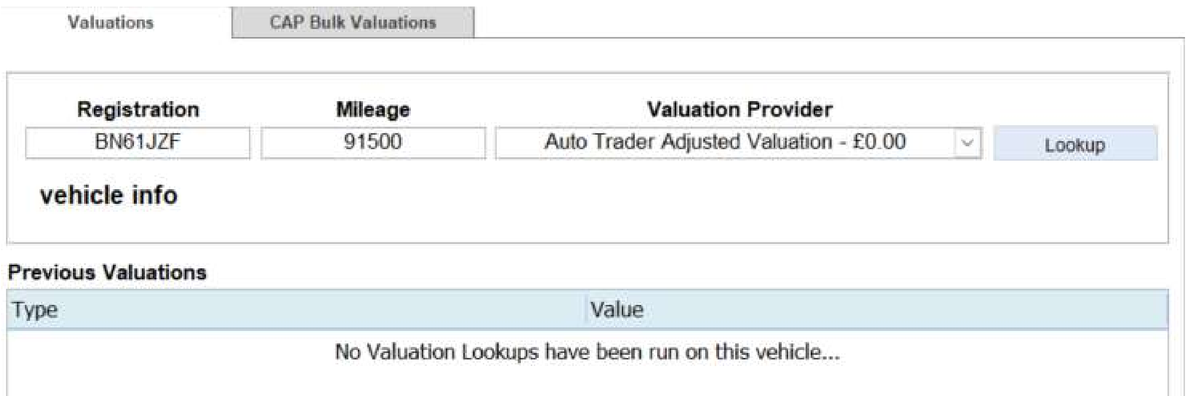
- Rolling Stock Report – Ideal for Insurance Companies shows all stock purchased or sold within two given dates.

Motor Trade Tools within DragonDMS

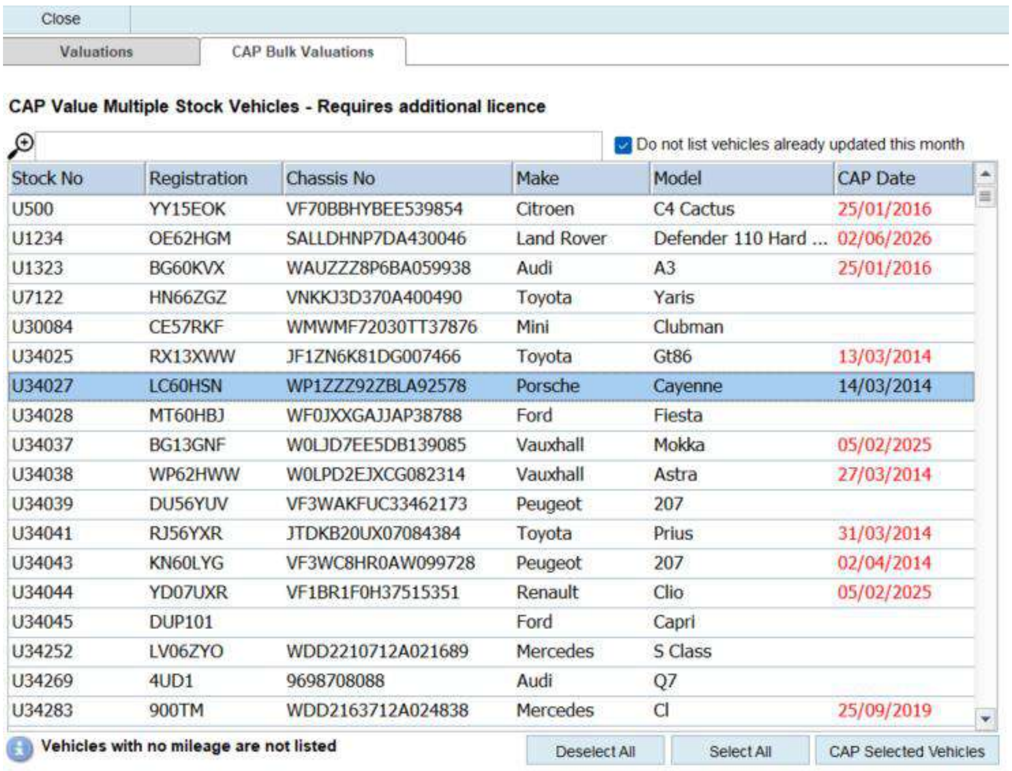
Valuations, Vehicle Data Lookups and Provenance checks can be accessed from within DragonDMS both as stand-alone checks. (Provenance and valuation checks can also be carried out from within a Vehicle Stock Record, see page 26.)

Valuations

To view the current valuation of a single vehicle click on the Valuations action tab and enter the vehicle registration and mileage in the top section of the screen, then select the Valuation Provider either CAP or AutoTrader.



To update the value of multiple stock vehicles click on the Valuations action tab and choose CAP CAP Bulk Valuations tab you can then select the vehicles that you wish to update, then click CAP Selected Vehicles. If you wish to update all stock vehicles click Select All followed by CAP Selected Vehicles.



Stock No	Registration	Chassis No	Make	Model	CAP Date
U500	YY15EOK	VF70BBHYBEE539854	Citroen	C4 Cactus	25/01/2016
U1234	OE62HGM	SALLDHNP7DA430046	Land Rover	Defender 110 Hard ...	02/06/2026
U1323	BG60KVX	WAUZZZ8P6BA059938	Audi	A3	25/01/2016
U7122	HN66ZGZ	VNKKJ3D370A400490	Toyota	Yaris	
U30084	CE57RKF	WMWMF72030TT37876	Mini	Clubman	
U34025	RX13XWW	JF1ZN6K81DG007466	Toyota	Gt86	13/03/2014
U34027	LC60HSN	WP1ZZZ92ZBLA92578	Porsche	Cayenne	14/03/2014
U34028	MT60HBJ	WF0JXXGAJJAP38788	Ford	Fiesta	
U34037	BG13GNF	W0LJD7EE5DB139085	Vauxhall	Mokka	05/02/2025
U34038	WP62HWW	W0LPD2EJXCG082314	Vauxhall	Astra	27/03/2014
U34039	DU56YUV	VF3WAKFUC33462173	Peugeot	207	
U34041	RJ56YXR	JTDKB20UX07084384	Toyota	Prius	31/03/2014
U34043	KN60LYG	VF3WC8HR0AW099728	Peugeot	207	02/04/2014
U34044	YD07UXR	VF1BR1F0H37515351	Renault	Clio	05/02/2025
U34045	DUP101		Ford	Capri	
U34252	LV06ZYO	WDD2210712A021689	Mercedes	S Class	
U34269	4UD1	9698708088	Audi	Q7	
U34283	900TM	WDD2163712A024838	Mercedes	Cl	25/09/2019

* A subscription to CAP is required to access this feature.

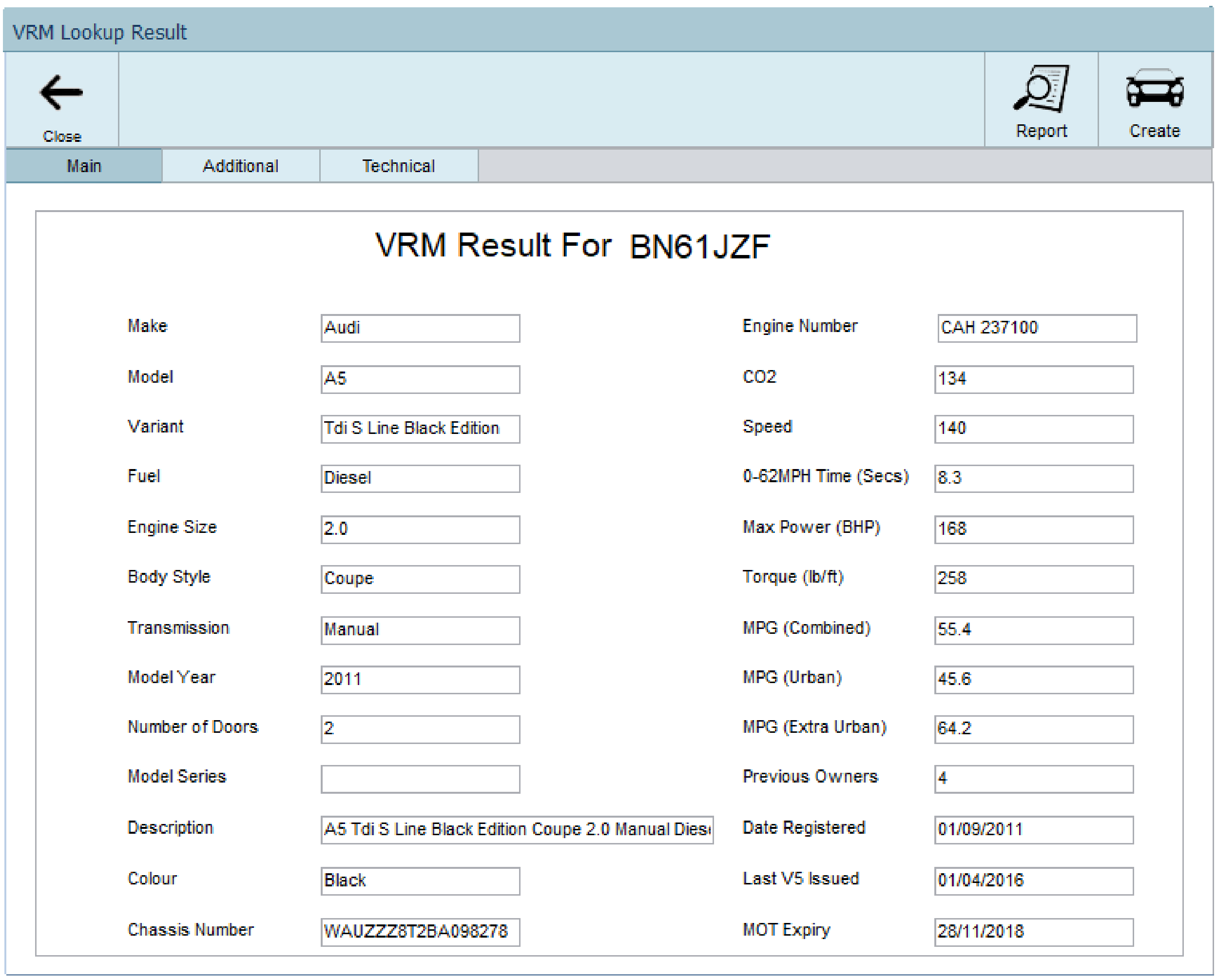
AutoTrader Valuation is £0.75 per lookup, this money is taken from your Cash Wallet. To top up your Cash Wallet contact our Accounts team.

***For Dealers that have linked their DragonDMS to their AutoTrader DID via the live feed, these lookups have no charge.**

VRM

The VRM tool can be used to lookup vehicles that are not in stock. Enter the vehicle registration into the box to the left of the search field and then click VRM.

The details of the vehicle will be displayed on screen. If you want to create a Vehicle Record click on Create.



Provenance Check

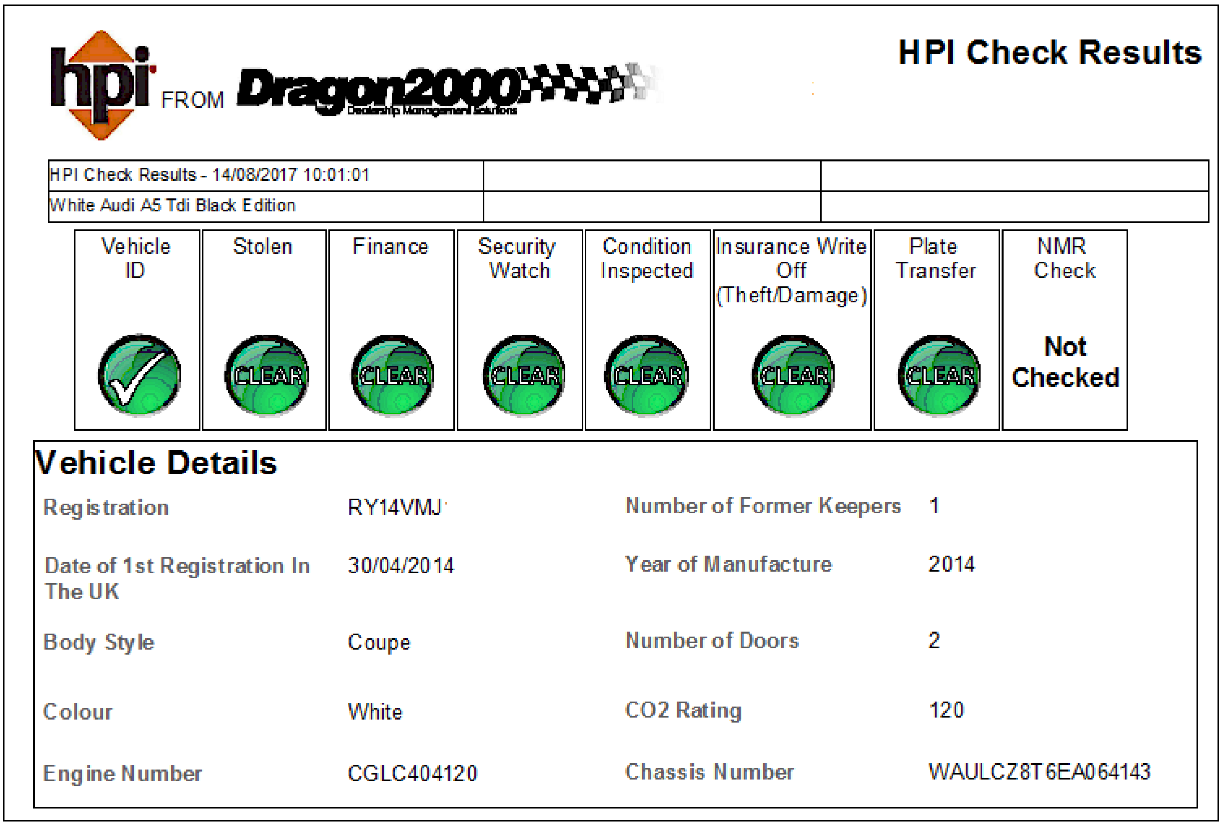
Provenance check can be undertaken in DragonDMS either with **HPI** or **MotorCheck**.

Provenance checks can be undertaken on vehicles without having to have the vehicle in stock. Click on the Provenance Check action tab, select the provider and enter the Vehicle Registration or VRM and click Lookup.

If you enter the vehicle mileage a check will be carried out against the National Mileage Register.

HPI Provenance Check

The HPI Check can identify if a vehicle has outstanding finance, is stolen, written off or clocked. The HPI report will be displayed on the screen and can be printed or saved as a PDF.



hpi FROM Dragon2000 Dealership Management Solutions

HPI Check Results

HPI Check Results - 14/08/2017 10:01:01		
White Audi A5 Tdi Black Edition		

Vehicle ID	Stolen	Finance	Security Watch	Condition Inspected	Insurance Write Off (Theft/Damage)	Plate Transfer	NMR Check
✓	CLEAR	CLEAR	CLEAR	CLEAR	CLEAR	CLEAR	**Not Checked**

Vehicle Details

Registration	RY14VMJ	Number of Former Keepers	1
Date of 1st Registration In The UK	30/04/2014	Year of Manufacture	2014
Body Style	Coupe	Number of Doors	2
Colour	White	CO2 Rating	120
Engine Number	CGLC404120	Chassis Number	WAULCZ8T6EA064143

*** A subscription to HPI is required to access this feature. ***

MotorCheck Provenance Check

The MotorCheck provenance check will highlight any issues with the vehicle in addition to checking for outstanding finance, mileage checks, stolen, written off, scrapped or at risk.

The report is web based and can be viewed on screen or saved.

MotorCheck

Report Summary

GB ABC 123

REF: P3385IP
DATE: 29/10/2018
DEALER

Vehicle History Check

LAND ROVER RANGE ROVER SP HSE TDV6 A SILVER, 2009

Minor issues

- **Keepers** – More keepers than average
- **Plate Change** – Previous plate change

All Clear

- **Finance** – No finance agreement recorded
- **Mileage Reading** – No mileage discrepancies
- **At Risk** – No risk marker recorded
- **Write-Offs** – No write-off recorded
- **Scrapped** – Not scrapped, no VIC recorded
- **Stolen** – No stolen record

Description

VRM	ABC 123	VIN	SALLSSALLS323276
VEHICLE	LAND ROVER RANGE ROVER SP HSE TDV6 A	ENGINE NO.	2993299306DT
ENGINE CC	2993 cc	ENGINE CODE	3.0LT TDV6-C
ENGINE SIZE	3.0 Litres	POWER	245 BHP
FUEL	DIESEL	VALVES	4
BODY	ESTATE	GEARS	6
TRANSMISSION	AUTOMATIC	0-60 MPH	8.8 seconds
SEATS	5	TOP SPEED	120 MPH

*** A subscription to MotorCheck is required to access this feature. ***

Margin VAT Scheme

Legislation regarding the Margin VAT scheme was updated in 2011. The margin VAT calculations in DragonDMS 2016 reflect these changes.

One of the key elements that is highlighted concerns Extras that you fit to Margin Cars:

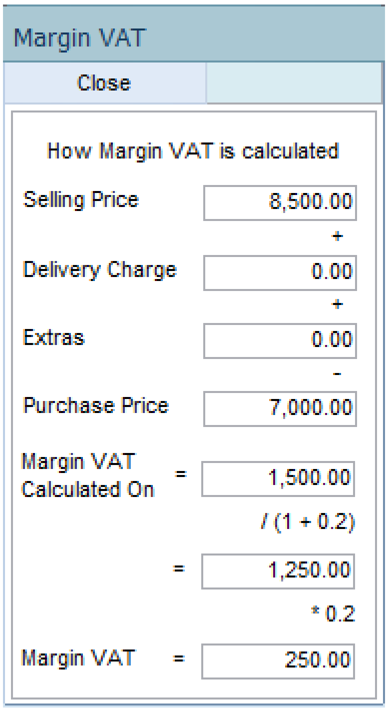
"If you fit accessories to a vehicle they become part of a single supply of a vehicle. If you are selling the vehicle under the Margin Scheme, the selling price you use to calculate your margin must include the charge for the accessories. You can reclaim the VAT you paid on the accessories"

The concept of Single Supply is not new but HMRC have identified this as an area where tax is being avoided.

The intention here is not to increase the tax-take from the dealers' margin, more that it prevents Customer's "accidentally" reclaiming VAT elements exposed on a Car Sales Invoice where the car was sold under the Margin Scheme.

How is margin VAT calculated?

Take the Selling Price and deduct any discount given, add Delivery Charge and Extras then subtract the Purchase Price; this will give the Profit Margin. Now calculate the VAT element of the Profit Margin and that is the Margin VAT that you owe.



Important Notes:

1. The Purchase Price is the 'raw' figure; this means that no reconditioning is taken into account in the purchase price.

2. Only the Discount amount is included in the Margin VAT calculation, the Additional Discount is not included.

If you make a loss you don't pay any VAT but you can't reclaim any VAT on Margin that you didn't make. Neither can you add up all the Profits and net off any losses over a batch of cars or over a trading period.

Selling extras and accessories

In most cases your Customers won't be able to reclaim the VAT on any extras, delivery charges or accessories you fit. This is because for VAT purposes the accessories are part of a single supply of a vehicle.

You'll need to include the accessories on the invoice for the vehicle, they can be treated in either of the following ways:

•Itemised separately on the invoice by adding them as Extras
•bundled together in the total price of the vehicle just include the value of the items into the Selling Price

For Qualifying Vehicles, Supplementary Invoices can be used to charge for accessories that are zero rated VAT or incur lower rated VAT

For more information go to http://www.hmrc.gov.uk/vat/sectors/motors/selling-cars.htm#4

Appendix 1 – Purchase and Sale Types

Purchase Types

Margin – Vehicle purchased within the UK under the Margin Scheme. Tax Code T0 in Sage. Where the vehicle is purchased from non VAT registered Suppliers or if the Purchase Invoice contains a Margin declaration.

Qualifying – VAT Qualifying vehicle purchased within the UK. Tax Code T1 in Sage. Where the vehicle is purchased from VAT registered Suppliers.

Commercial - VAT Qualifying commercial vehicle purchased within the UK. Tax Code T1 in Sage. Where the vehicle is purchased from VAT registered Suppliers.

EU Qualifying – For NI Dealers only - Vehicles purchased within the EU outside of the Margin Scheme. Tax Code T8 in Sage, this is acquisition VAT. Where the vehicle is purchased from VAT registered Suppliers. Acquisition VAT is at the UK Standard VAT Rate.

Import – Vehicle purchased from ROW. Tax Code T0 in Sage. Import Duty and Import VAT are invoiced by the vehicle courier and not the vehicle seller, therefore these are not included within DragonDMS. VAT is due on the full selling price for vehicles purchased using this type.

Caravan Reduced Rate – Caravans that meet the requirements for reduced rate VAT. T5

Sale Types

UK Sale – Standard UK Sale. Tax Code T10 in Sage if sold under the Margin Scheme, Tax Code T1 if VAT Qualifying. Sales Invoice must show a margin declaration if sold under the Margin Scheme.

Commercial – Commercial UK Sale. Tax Code T1 in Sage.

EU Sale – Standard EU Sale. Tax Code T10 in Sage if sold under the Margin Scheme, Tax Code T4 if VAT Qualifying. Sales Invoice must show a margin declaration if sold under the Margin Scheme.

Zero Rate Export – Zero Rated Sale. Tax Code T0 in Sage.

Disability – Disability UK Sale. Tax Code T0 in Sage. This sale type must be direct to a wheelchair user. If sold via a third party (e.g. Motability) then the UK Sale Type must be used. Vehicle must be one that is specially adapted for use by the Customer. Vehicles that have not been adapted are not eligible for this Sale Type. A certificate must be obtained from the Customer confirming that they are chronically sick or disabled and the vehicle is for their personal use.

Trade Sale – UK Trade Sale. Tax Code T10 in Sage if sold under the Margin Scheme, Tax Code T1 if VAT Qualifying. Sales Invoice must show a margin declaration if sold under the Margin Scheme.

Caravan Reduced Rate – Caravans that meet the requirements for reduced rate VAT. T5

Appendix 2 - IPT – Insurance Premium Tax

IPT is a tax on premiums received under taxable insurance contracts. As long as you enter both the selling price and the cost price, DragonDMS will calculate the IPT correctly for you.
There are two rates:

1. A standard rate of 12%.
2. A higher rate of 20% for insurance supplied with selected goods and services.

The higher rate of IPT applies to insurance sales in three trading sectors where insurance is sold in relation to goods and services which are subject to VAT:

1. Sales of motor cars, light vans or motor cycles.
2. Sales of electrical or mechanical domestic appliances.
3. Sales of travel insurance.

Regarding Motor Vehicles

The higher rate of IPT will apply to an insurance premium relating to a motor car or motor cycle if the contract is arranged through or supplied by:

1. A supplier of motor cars or motor cycles.
2. A person connected to a supplier of motor cars or motor cycles, where the insurance relates to a motor vehicle provided by the connected supplier.
3. A person who pays, to a person described in points 1 or 2, a fee relating to an insurance contract covering the motor vehicle.

There are three basic scenarios regarding IPT and the sale of insurance premiums by motor traders:

1. Free of charge
   If the motor trader sells the insurance premium free of charge, his customer pays no IPT. The supplier of the premium recovers IPT at 10% (standard rate) from the motor trader. For example:
   - Selling price to customer = £0.00 • IPT to Customer = £0.00
   - Cost Price to trader = £100.00 • IPT to trader = £12.50

2. Discounted premium
   If the motor trader sells the premium at any price lower than the cost from the insurer but higher than zero, he charges his Customer IPT at 20% (higher rate). The insurer will recover IPT at 20% on the price the motor trader sold the premium and at 10% on the difference in that price and the cost price. For example:
   - Selling price to Customer = £50.00 • IPT to Customer = £10.00
   - Cost price to trader = £100.00 • IPT to trader = £10.00 (@20%) + £6.00 (@12%) Total IPT to trader = £16.00

3. Full price or higher
   If the motor trader sells the premium for the same or higher price than the cost price from the insurer, his Customer is charged IPT at 20% (higher rate). The insurer will recover IPT at 20% on the total selling price of the premium to the motor trader's Customer. For example:
   - Selling price to customer = £150.00 • IPT to customer = £30.00
   - Cost to trader = £100.00 • IPT to trader = £30.00