

Dragon2000

Vehicle Sales Training Manual



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Getting Started

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



The image shows a login window titled "Dragon2000 Login - C8888 (x64)". The window has a light blue header with the "DragonDMS" logo. Below the header, there are two input fields: "User Name" with the text "username" and "Password" with masked characters "*****". A note below the password field states "* Passwords are case sensitive". At the bottom, there are two buttons: "Cancel" and "Login".

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

Main Menu

Customers

Suppliers

New Vehicles

Used Vehicles

Service

Parts

Accounts

Take Payment

Dashboard

Apps

CRM

Reports

Support

Exit

Create Vehicle

Valuations

Advertising

Provenance Check

Templates

Utilities

Finance Calculator

Extras

- Search All -

Vehicles In Stock - (458 Records)

Reserved Stock - (233 Records)

Pending Part Exchanges - (28 Records)

Vehicles Sold - (648 Records)

Advertising - (84 Records)

Supplementary Invoices - (108 Records)

Job Card Requests - (70 Records)

All Vehicles - (458 Records)

Pricing - (459 Records)

Vehicles In Stock - All Vehicles

VRM

Clear

Show All

Stock No	Sales Status	Registration	Make	Model	Description	Mileage	ULEZ...	Days In Stock	MOT Due .../SIV	Advert Price
U35645	For Sale	HJ73XLM	Audi	RS6 Avant	4.0 TFSI V8 Carbon Black Estate Sdr Petrol Tiptronic quattro Eur...	38500	Yes	4	18/10/2026	18,489.00
U35644	Part Exchange	SM72NFX	Nissan	Qashqai	1.3 DIG-T MHEV N-Connecta SUV Sdr Petrol Hybrid Manual Eur...	15000	Yes	6	12/01/2026	2,759.00
U35643	Part Exchange	VX72UZP	Nissan	Qashqai	1.3 DIG-T MHEV N-Connecta SUV Sdr Petrol Hybrid Manual Eur...	10000	Yes	6	20/11/2024	5,259.00
U35641	For Sale	DT24KYE	Hyundai	TUCSON	1.6 T-GDI Premium SUV Sdr Petrol Hybrid Auto Euro 6 (1/15) (21...	35623	Yes	11	2/2/2024	12,020.00
U35639	For Sale	BA17SDJ	Land Rover	Range Rover...	2.0 TD4 SE Tech SUV Sdr Diesel Auto 4WD Euro 6 (1/15) (180 ps)	13245	Yes	21	17/01/2025	50,000.00

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.

Search All Used Vehicles

Cancel

Search

Saved filters:

Field

Expression

Value

Load >

X

Save

Reset

Add Criteria Row

AND...

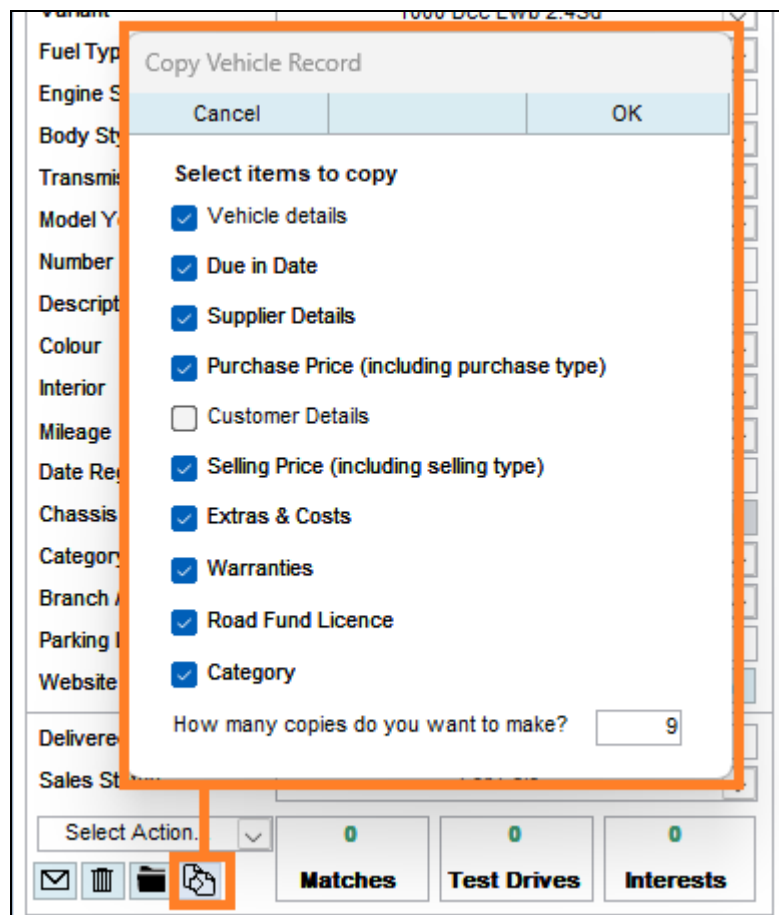
Quick Filter

☐ In stock
 ☐ Reserved
 ☐ Sold

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:-

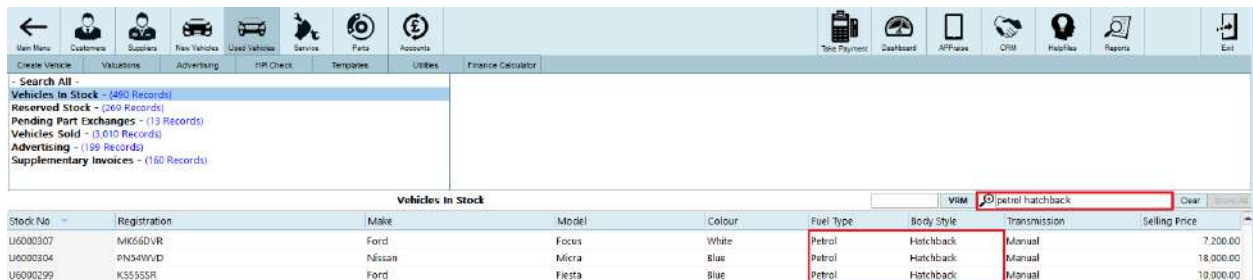
- The list of New Vehicles displays a Chassis Number column in place of a Registration column.
- All vehicles added to the New Vehicle Module will automatically be set as VAT qualifying.
- The purchase and sales groups will default to New and will use different nominal codes to those used on Used Vehicles. 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.

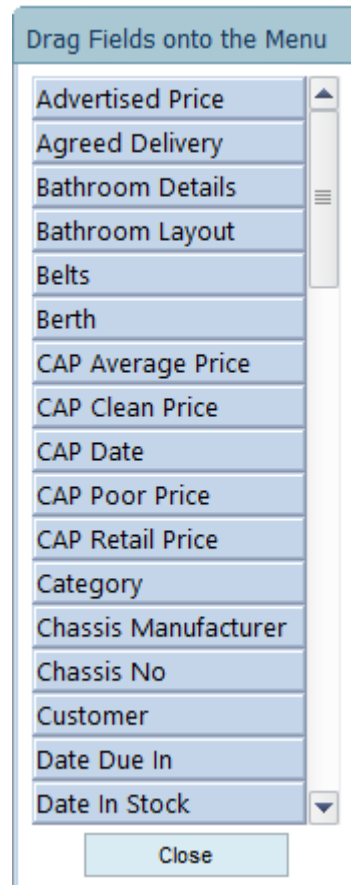
Vehicles In Stock											
Stock No	Registration	Make	Model	Variant	Transmissic	Fuel Type	Doors	Body Style	Fuel Type	Selling Price	T. Location
U6	HB06RHG	AUDI	TT	QUATTRO (180BHP)	MANUAL	Alpine White	3	COUPE	PETROL	24300.00	Showroom

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.

Stock No	Registration	Make	Variant	Model	Colour	Doors	Body Style	Selling Price	T.. Location
U4	BV11YHB	MAZDA	D TAMURA	Variant	iver	5	HATCHBACK	17500.00	Showroom

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

The screenshot shows a 'Vehicle Lookup' dialog box with the following details:

Vehicle Lookup	
Cancel	Lookup Vehicle
Registration: MJ15WXX	
Mileage: 70000	
☒ Specification (Standard & possible Non-Standard Spec)	£0.15
☒ Adjusted Valuation & Checks	£0.75
Total: £0.90	
This will be debited from your DragonDMS Wallet. Current balance: £5.95	

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

Vehicle Creation			
Cancel			Next
Vehicle Details	Specification	Values & Checks	Advert Details
BMW X4 20d M Sport Automatic Diesel - 3 owners - Black Sapphire metallic paint Not the correct vehicle?			
Registration	WJ15WXX	BHP	187
Chassis No	WBAXX120500N1624	Torque (lb / ft)	294.99
Make	BMW	Top Speed MPH	132
Model	X4	0 - 60 MPH	0
Variant	20d M Sport	Fuel Aspiration	
Fuel Type	Diesel	Fuel Delivery	Turbo Common Rail
Engine Size	2.0	MPG Combined	54.3
Engine Number	75059111	MPG Urban	50.4
Body Style	SUV	MPG Extra Urban	57.6
Transmission	Automatic	Battery Charge Time	
Description	2.0 20d M Sport SUV 5dr Die:	Battery Quick Charge Time	
Model Year	2015	Battery Range (Miles)	
Date Registered	25/03/2015	Battery Capacity KWH	
Owners	3	Battery Usable Capacity KWH	
Colour	Black Sapphire metallic paint	Height (mm)	1624
Interior		Width (mm)	1881
Doors	5	Length (mm)	4671
Seats	5	Weight KG	1745
MOT Expiry	17/12/2021	Branch	
Vehicle Type	Car	Template	

These fields are returned by the VRM lookup and can be edited 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.

Vehicle Creation			
Cancel		Previous	Next
Vehicle Details	Specification	Values & Checks	Advert Details
Does this vehicle have any Non-Standard Options fitted? Note. This could affect the valuation you receive.			
Feature Name	Price	Fitted?	
Audio and Communications Media Package - BMW Professional Speaker System - Harman Kardon TV Function Enhanced Bluetooth Telephone Preparation with USB Audio Interface and Voice Control ConnectedDrive Services Package Speaker System - BMW Advanced Speed Limit Display Online Entertainment Internet BMW Online Services Bluetooth Hands-Free with USB Audio Interface			
	900.00	☒	
	895.00	☒	
	825.00	☐	
	430.00	☐	
	410.00	☐	
	335.00	☒	
	250.00	☐	
	160.00	☐	
	95.00	☐	
	0.00	☐	
	0.00	☐	
	2,130.00		

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.

Standard Specification	
Feature Name	Fitted?
☐ Audio and Communications	
12V Power Socket - Centre Console	☒
6.5in Colour Display Screen	☒
Auxiliary Input	☒
Bluetooth - Audio Streaming - with Compatible Devices	☒
Bluetooth Hands Free with USB Audio Interface	☒
BMW Emergency Call	☒
BMW Navigation Business System	☒
BMW Professional Radio - Single CD and MP3	☒
BMW TeleServices	☒
DAB Digital Radio	☒
Media Package - BMW Business	☒
Power Socket - 12V in Luggage Compartment	☒

Lookup Spec

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.

Vehicle Creation						
Cancel			Previous	Next		
Vehicle Details		Specification	Values & Checks	Advert Details		
Valuations						
Type		Value				
☐ Auto Trader Valuation - Last Checked: 05/05/2021						
Retail		18,466.00				
Trade		14,184.00				
Part Exchange guide price		13,910.00				
Private		15,830.00				
Specification changes have been made. Click "Revalue" to update the adjusted valuations from Auto Trader.						
		Revalue Lookup Valuations				
Metrics & Checks						
Rating	57.68 / 100	Insurance Write-off Category	False			
Date of previous keeper(s)	28/10/2017	Scrapped	False			
		Stolen	False			
		Imported	False			
		Exported	False			
MOT History (double click for more information)						
Completed Date	Expiry Date	Result	Odometer	Unit	MOT Test No	No. of Comments
10/10/2020 09:12...	09/10/2021	Passed	73,367	Miles	582778927672	1
09/10/2020 16:17...		Failed	73,366	Miles	348541193217	2
05/10/2019 10:15...	08/10/2020	Passed	66,805	Miles	630937081119	1
05/10/2018 10:40...	08/10/2019	Passed	59,640	Miles	708009596338	0

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.

Vehicle Creation

Cancel

Previous

Create Vehicle

Vehicle Details

Specification

Values & Checks

Advert Details

Advert Price

18,466.00

☐ Is Commercial

☐ Is Qualifying

Attention Grabber

Low mileage with *£2,130 of optional extras

Use Optional Spec Price

Advertising Description

Auto Generate

Copy Ad Text From:

This sleek and stylish Audi 2.0 TDI S line Coupe is the perfect combination of luxury and performance. With a powerful 2.0 diesel engine and quattro all-wheel drive, this car delivers a smooth and exhilarating driving experience.

The striking blue exterior is complemented by a spacious and comfortable interior, making every journey a pleasure. With a top speed of 140mph and acceleration of 0-60mph in just 7.5 seconds, this car is sure to impress.

Equipped with a range of standard features including audio and communications systems, safety and security features, and a high-performance engine, this Audi is ready for any adventure.

881 characters used

Select the Advertisers you wish to send to

Advertise?	Name
☒	All Advertisers
☒	* Auto Trader Portal - Live Updates
☒	Auto Trader Live Advert
☒	CarGurus
☒	demo-prestigeautosales.dragon20...
☒	eBay Motors Pro
☒	Motors/EMG (eBay Motors Group)
☒	PistonHeads
☒	support-site.dragon2000.net

Website Specific

AutoTrader Specific

eBay Specific

Set as

Reserved

☐ POA

☐ Featured Vehicle

☐

Title

Website Category

Car

Bodystyle Category

Original Price

Click [Create Vehicle](#) select Add photos or open vehicle record.

Dragon2000

?

Do you want to

☒ Add Photos Now
 ☐ Open Vehicle Record

Cancel

OK

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.

Vehicle Record for: WJ15WXX

←

X4 20d M Sport

WJ15WXX (U34959)

No Customer Selected

£22,159.20

Vehicle

Supplier

Customer

Apps

CRM

Advertising

Additional

Invoicing

Close

Stock Number

U

34959

Registration

WJ15WXX

Lookup

Make

BMW

Model

X4

Variant

20d M Sport

Fuel Type

Diesel

Engine Size

2.0

Engine No

53049285

Body Style

SUV

Transmission

Automatic

Model Year

2015

Number of Doors

5

Model Series

Description

X4 20d M Sport 2.0 5dr SUV Automatic Diesel

Colour

Black Sapphire metallic paint

Interior

Mileage

70000

Mis/Kms

Mis

Date Registered

18/08/2015

Chassis Number

WBAXX120500N45234

Lookup

Category

Branch / Location

Yate

Parking Location

Website URL

Open

Delivered to Customer

Sales Status

For Sale

Select Action...

0

0

0

Matches

Test Drives

Interests

Technical

Custom Fields

Dates

Value / Checks

Job Card Requests

MOT History

Vehicle Details

Technical

Technical Continued

Motorhome

CO² Emissions

139

Max Power (BHP)

187

Insurance Group

31E

Max Torque (lb/ft)

295

NCAP Rating

MPG (Combined)

54.3

Top Speed (MPH)

132

MPG (Urban)

50.4

0-62MPH Time (Secs)

0

MPG (Extra Urban)

57.6

Vehicle Details - Additional

Key Number

Immobiliser Code

Radio Code

Wheel Nut Number

Nominal CC

1995

Registration and Security

Original Registration

Future Registration

V5 Reference

Number of Owners

SORN

Unroadworthy

Service History

Service History

Log Book

Service History Details

Service History

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

Page 12

Create Used Vehicle Record	
Cancel	Confirm
Registration	BN61JZF Lookup
Make	Audi
Model	A5
Variant	Tdi S Line Black Edition
Fuel Type	Diesel
Engine Size	2
Body Style	Coupe
Transmission	Manual
Model Year	2011
Branch	
Template	

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.

Create New Supplier	
Cancel	Confirm
Account Name	
Title	Mr
First Name	Steven
Last Name	Stevenson
Company	
Post Code	House No
Telephone	☐ Preferred
Mobile	☐
Email	Steve@test.com ☐

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.

0.00	Vehicle	Supplier	Customer	APPraise	CRM	Advertising	Additional	Invoicing
Purchase		Sales		Supplementary		Part Exchange		Payments
Deal Analysis								

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.

Purchase Type	Margin	
Purchase Price		9,500.00
Purchase VAT	0.00%	0.00 TO
Date in Stock		06/07/2026
Total		9,500.00

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.

Purchase	Sales	Supplementary	Part Exchange	Payments	Deal Analysis																																	
Purchase Invoicing	Additional																																					
<table><tr><td>Purchase Type</td><td>Margin</td><td></td></tr><tr><td>Purchase Price</td><td></td><td>9,500.00</td></tr><tr><td>Purchase VAT</td><td>0.00%</td><td>0.00 TO</td></tr><tr><td>Date in Stock</td><td></td><td>06/07/2026</td></tr><tr><td>Total</td><td></td><td>9,500.00</td></tr></table>		Purchase Type	Margin		Purchase Price		9,500.00	Purchase VAT	0.00%	0.00 TO	Date in Stock		06/07/2026	Total		9,500.00	<table><tr><td>Purchase Invoice Number</td><td>1501</td><td>Printed</td></tr><tr><td>Purchase Invoice Date</td><td colspan="2">20/08/2026</td></tr><tr><td colspan="2">Print Proforma</td><td>Print Purchase Invoice</td></tr><tr><td>Purchase Credit Number</td><td colspan="2"></td></tr><tr><td>Purchase Credit Date</td><td colspan="2">20/08/2026</td></tr><tr><td colspan="3">Raise Credit</td></tr></table>				Purchase Invoice Number	1501	Printed	Purchase Invoice Date	20/08/2026		Print Proforma		Print Purchase Invoice	Purchase Credit Number			Purchase Credit Date	20/08/2026		Raise Credit		
Purchase Type	Margin																																					
Purchase Price		9,500.00																																				
Purchase VAT	0.00%	0.00 TO																																				
Date in Stock		06/07/2026																																				
Total		9,500.00																																				
Purchase Invoice Number	1501	Printed																																				
Purchase Invoice Date	20/08/2026																																					
Print Proforma		Print Purchase Invoice																																				
Purchase Credit Number																																						
Purchase Credit Date	20/08/2026																																					
Raise Credit																																						

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.

Vehicle Purchase - Outstanding Finance	
Settlement Due To	BLA001 Edit Find Clear
Agreement Number	1234
Settlement Amount	7,000.00
Balance To Supplier	2,500.00

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](#).

Vehicle Funding	
Funder	Nextgear v
Funding Amount	9,500.00
Agreement Number	15241
Funding End Date	05/08/2021
Funding Days Remaining	92
Date Paid Off	

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.**

Selling Price Update

☒ Update Selling Price when Advert Price is updated and no Customer is attached.

Vehicle Record for: RV66CDF

← Close 5 Series 520d SE Saloon
RV66CDF (U126874994) £12,000 Vehicle Supplier Customer Apps CRM Advertising Additional **Invoicing**

Stock Number U 126874994
Registration RV66CDF Lookup
Make BMW
Model 5 Series
Variant 520d SE Saloon
Fuel Type Diesel
Engine Size 2 Engine No
Body Style Saloon
Transmission Automatic
Model Year
Number of Doors 4 Model Series
Description 5 Series 520d SE Saloon Saloon 2 Automatic Dies
Colour Mineral Grey
Interior
Mileage Mls/Kms Mls
Date Registered 09/09/2016
Chassis Number WBA5E52000G721716 Lookup
Category
Branch / Location
Parking Location
Website URL Open
Delivered to Customer
Sales Status For Sale
Select Action... 1 0 0
Matches Test Drives Interests

Purchase **Sales** Supplementary Part Exchange Payments Deal Analysis

Sales Invoicing Price History

Sale Type UK Sale
Screen Price ? 12,000.00
Discount 0.00
Sales VAT 0.00% 0.00
Selling Price Target 12,000.00
Delivery Charge 0.00
Extras Total ? 0.00
Total VAT 0.00
RFL Amount 0 0.00
Cherished Trans No 0.00
IPT Warranty Total 0.00
IPT Total 0.00
Total Price Target 12,000.00
Less PX Allowance 0.00
Sub Total 12,000.00
Add HP Settlement 0.00
Net Price 12,000.00
Less Finance Amount 0.00
Less Deposit Amount 0.00
Balance 12,000.00
Additional Discount 0.00
Invoice Total 12,000.00

Sales Invoice Number
Sales Invoice Date 24/10/2019
Print Order Form Print Sales Invoice
Sales Credit Number
Sales Credit Date 24/10/2019
Raise Credit
Select Artwork
Dragon2000
Special Instructions on Invoice

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.

Purchase	Sales	Supplementary	Part Exchange	Payments	Deal Analysis
Sales Invoicing		Price History			
Date	Changed To	Changed From	Price Change	Adjusted By	
[-] Advert Price					
05/05/2021	14,999.00	15,000.00	-1.00	Dragon	
[-] Screen Price					
05/05/2021	14,999.00	15,000.00	-1.00	Dragon	
05/05/2021	15,000.00	12,500.00	2,500.00	Dragon	
05/05/2021	12,500.00	N/A	N/A	Dragon	

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.

The screenshot shows the 'Advertising Details' section of the DragonDMS interface. At the top, there are tabs for 'Overview', 'Specification', 'Photos', 'Sites', and 'Reports'. Below these are sub-tabs for 'Advertising Info', 'Website Categories', 'Other', and 'Attachments'. The 'Advertising Info' sub-tab is active, showing the 'Advertising Details' form. The form includes a checkbox for 'Advertise on my Website' (checked), and three checkboxes for 'Reserved', 'POA', and 'Featured Vehicle'. There are input fields for 'Advert Price' (5000), 'Original Advert Price' (0), and a 'ULEZ Compliant' dropdown set to 'Yes'. On the right, there are dropdowns for 'Website Category', 'Body Style Icon', and 'Vehicle Type' (set to 'Car'), along with an 'Attach Document' button. Below these are radio buttons for 'Use Video URL' (selected) and 'Use Sales Video*'. At the bottom of the form, there are 'Website Title' and 'Attention Grabber' fields with 'Regenerate' and 'Auto Generate' buttons respectively. A section for 'Advertising Text' shows a 'Copy Ad Text From' dropdown set to 'Auto Generate' and a character count of '962 characters used'. The text area contains two paragraphs of sample text for a Vauxhall 1.0 ecoFLEX 12V S MPV.

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

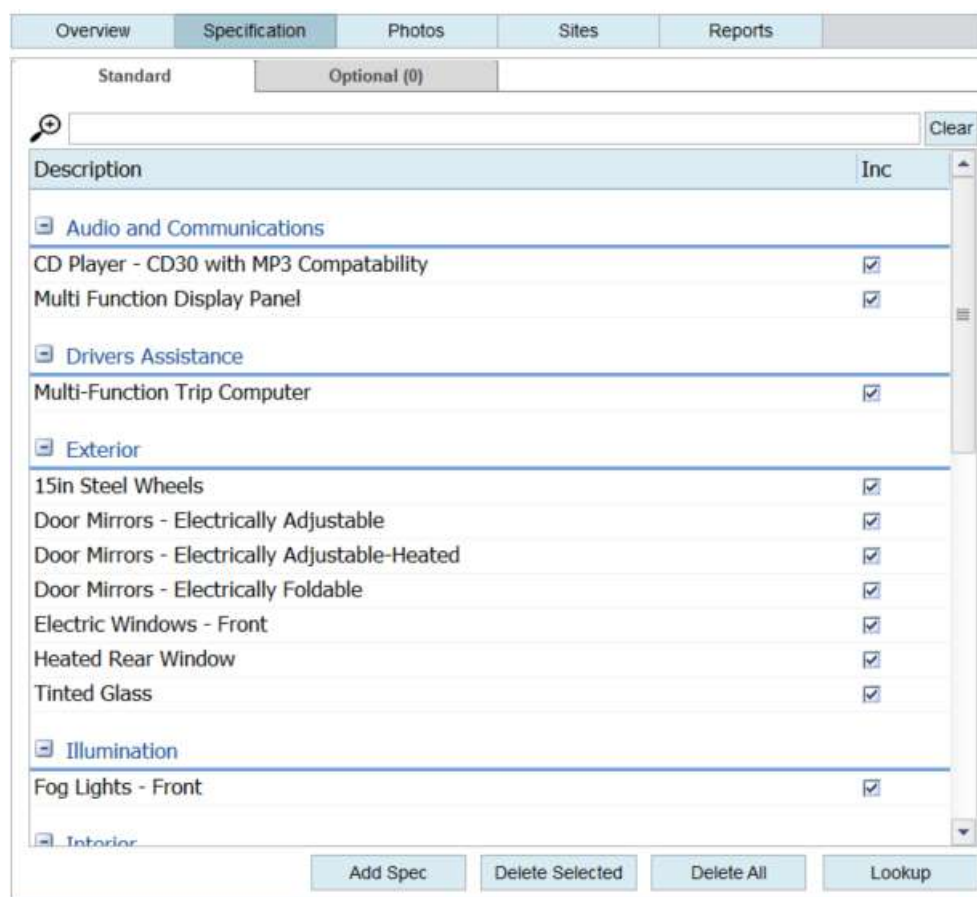
This feature will populate a list of standard specification specific to the vehicle.



**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.

Standard Equipment Lookup

Automatically retrieve the Standard Specification when a vehicle is created using:

☐ Do not retrieve the Standard Specification
☒ CAP Standard Specification (NVD)
☐ Autotrader Specification

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.

Optional Features

Cancel OK

Select optional features to add to vehicle * Optional features will be automatically ticked if known.

Feature Name	Price	Fitted?
☒ Comfort		
Designo Nappa Leather	2,510.00	☒
Leather Seating	1,275.00	☐
Mercedes-Benz Audio 50 APS	1,185.00	☐
Elec.Adj.Driver's Seat/Steering Column/Mirror's	665.00	☐
Harman/Kardon LOGIC 7 Surround Sound System	510.00	☐
Bose Sound System	485.00	☒
Wood Leather Steering Wheel	480.00	☐
Telephone Pre-Wiring	440.00	☒
Luxury Climate Control	435.00	☒
Designo Two-Tone Leather Steering Wheel/Gearshift	410.00	☒
Passenger's Seat-Electrically Adj. With Memory	380.00	☐
Passenger's Seat Electrically Adj.with Memory	370.00	☐
CD Changer	360.00	☐
Heated Seats	320.00	☐
Linguatronic-Voice Activation Phone Equipment	320.00	☐
Parameter Steering Wheel - Speed Sensitive	205.00	☐
Telephone Cradle for Nokia 6110/6610/6610i/7110i	121.00	☐
	5,842.01	

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'.

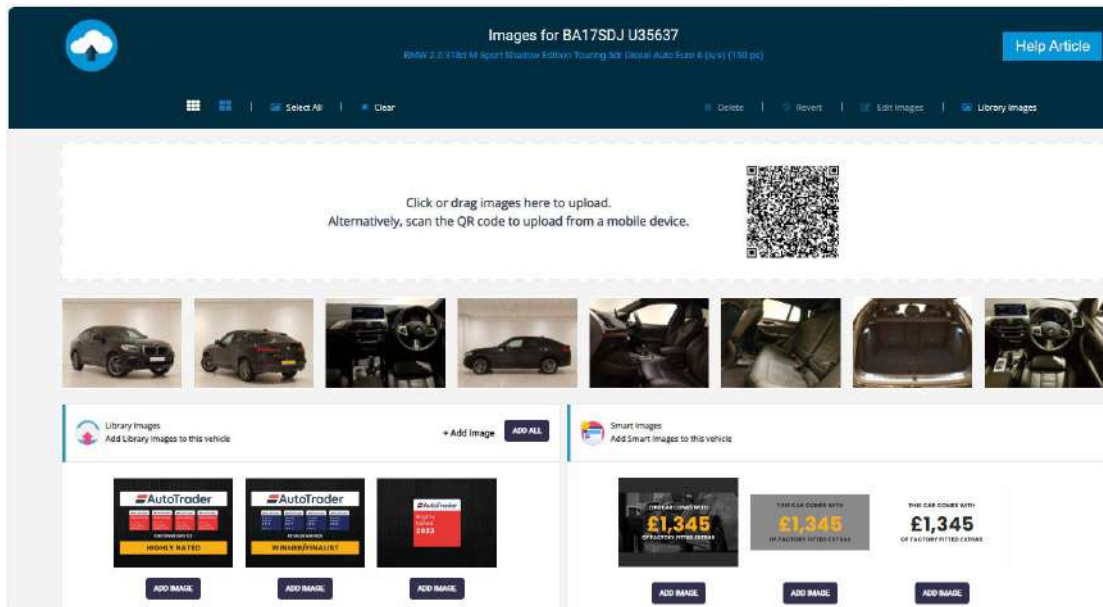
HPI Spec Check

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

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		Specification	
Make:	Nissan	Engine Power:	108bhp
Model:	Qashqai Dci Acenta Smart Vision 5	Max Speed:	112mph
Body Type:	Hatchback	Acceleration(0-62MPH):	12.4secs
Engine:	1.5	Extra Urban Consumption:	79.8mpg
Transmission:	Manual	Combined Consumption:	74.3mpg
Year:	2015	CO2:	99g/Km
Mileage:		Insurance Group:	
Price:	£15,000.00		
Standard Equipment			
Driver Convenience			
✓ 5" TFT driver information centre	✓ Bluetooth phone integration system	✓ Cruise control	
✓ Front and rear parking sensors	✓ Lane departure warning system	✓ PAS	
✓ Service interval indicator	✓ Speed limiter	✓ Traffic sign recognition	
✓ Trip computer			
Entertainment			
✓ 6 speakers	✓ Radio/CD	✓ Steering wheel mounted audio controls	
✓ USB/aux input socket			
Exterior Features			
✓ 2 speed wipers variable intermittent wipe	✓ Automatic headlamp activation	✓ Black honeycomb front grille	
✓ Body colour bumpers	✓ Body colour door mirrors and handles	✓ Body colour electric heated door mirrors	
✓ Chrome window surround	✓ Electric front/rear windows	✓ 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.

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.

The screenshot shows the 'Advertising - Auto Trader Portal' section of the DragonDMS software. The interface includes a top navigation bar with icons for various functions like 'Create Vehicle', 'Valuations', 'Advertising', 'Provenance Check', 'Templates', 'Utilities', 'Finance Calculator', 'Extras', 'Take Payment', 'Desktop', 'Apps', 'CRM', 'Reports', 'Support', and 'Exit'. Below this is a sidebar menu with options like 'Search All', 'Vehicles In Stock', 'Reserved Stock', 'Pending Part Exchanges', 'Vehicles Sold', 'Advertising', 'Supplementary Invoices', 'Job Card Requests', 'All In Stock Vehicles', 'Auto Trader Cars & Vans', 'Auto Trader Portal', 'Auto Trader Profile Page', 'CarGurus', 'My Website', 'Piston Heads', and 'Not Advertised'. The main area displays a table of vehicles with columns for Stock No, Registration, Make, Description, Sales Status, Days In Stock, Price Indicator, Advert Price, and Advertise status. A summary table at the bottom shows Quota, Published, Capped, Selected, Not Published, and Vehicle Count for Main Stock and £2500 and Under Stock.

Stock No	Registration	Make	Description	Sales Status	Days In Stock	Show	Price Indicator	Advert Price	Advertise	Auto Trader
U22548	PE18ZKD	Nissan	Junk Tekna Hatchback 1.6 Manual Petrol	For Sale	221	☒	GREAT	8,280.00	☒	PUBLISHED
U4254	FV60PHN	Audi	A3 TFSI Sport 2.0 2dr Convertible Manual Petrol	Part Exchange	164	☒	GREAT	10,681.00	☒	PUBLISHED
U4350	6ACN	Ferrari	F430 4.3 2dr Saloon Manual Petrol	For Sale	144	☒	GOOD	4,980.00	☒	PUBLISHED
U12537	NONE	BMW	3 Series 316D Se Touring Estate 2.0 Manual Diesel	For Sale	139	☒	GOOD	9,480.00	☒	PUBLISHED
U12664	VK15EYU	Audi	A3 TFSI Sport 2.0 2dr Convertible Manual Petrol	For Sale	137	☒	GREAT	4,385.00	☒	PUBLISHED
U12671	DT63HYK	Kia	Mentor Executive Se Saloon 1.5 Automatic Petrol	Reserved	133	☒	GREAT	6,460.00	☐	NOT ADVER...
U12715	GFD432	Lamborghini	Reventon V12 Coupe 6.5 Manual Petrol	For Sale	125	☒	GREAT	11,980.00	☒	PUBLISHED
U126874	KY11DXT	Nissan	Junk Tekna Hatchback 1.6 Manual Petrol	For Sale	124	☒	GREAT	14,480.00	☒	PUBLISHED
U126874	LD64JIV	Toyota	Aygo VVT-i X-Play 1.0 5dr Hatchback Manual Petrol	For Sale	63	☒	GREAT	7,960.00	☒	PUBLISHED

	Quota	Published	Capped	Selected	Not Published	Vehicle Count
Main Stock	133	122	0	122	7	128
£2500 and Under Stock	0	0	0			

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.

Vehicle Details	Technical	Technical Continued	Motorhome
CO ₂ Emissions	177	Max Power (BHP)	150
Insurance Group		Max Torque (lb/ft)	140.2
NCAP Rating		MPG (Combined)	38.2
Top Speed (MPH)	129	MPG (Urban)	27.2
0-62MPH Time (Secs)	7.9	MPG (Extra Urban)	49.6

Vehicle Details	Technical	Technical Continued	Motorhome
Model Introduced	01/11/2013	Power Delivery	Turbo Common Rail
Model Visibility Date	01/11/2013	Wheel Base	2578
Model Series	5L	Country of Origin	Czech Republic
Cab Type		Engine Model Description	TDi CR
Drive Type	4x2	Engine Code	
Variant Termination Date		Engine Position	Front
Body Shape	Outdoor	Engine Make	Skoda Autot UK Ltd
Driving Axle	Front Wheel Drive	Bore	81

Vehicle Details	Technical	Technical Continued	Motorhome			
Start/Stop	☐	Boot Space - Seats Up	745			
Fuel Capacity (Litres)	0	Boot Space - Seats Down	1,645			
Electric/Hybrid Vehicle						
Battery Range (Miles)	351	Battery Charge Time				
Battery Capacity (kWh)	102.4	Battery Quick Charge Time				
Battery Usable Capacity (kWh)	98.4					
Charge Times (Double click to edit)						
Charger Type	Description	Supply Type	Connector	Start Battery %	End Battery %	Duration (Mins)
Ultra Rapid ...	Tesla CC...	DC	Tesla S...	10.00%	80.00%	38
Ultra Rapid ...	Tesla Su...	DC	Tesla S...	20.00%	80.00%	42
Ultra Rapid ...	Tesla CC...	DC	Tesla S...	10.00%	80.00%	42
Ultra Rapid ...	Tesla CC...	DC	Tesla S...	0.00%	80.00%	43

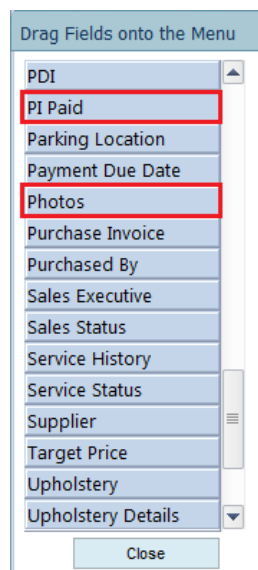
Custom Fields

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

Technical	Custom Fields	Dates	Value / Checks	Job Card Requests	MOT History
Vehicle - Custom Fields					
Key No	C5				
PDI	Outstanding				
Photos	Outstanding				
HPI Checked	No				
Arrived					
Appraised	Yes				
PI Paid					

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.

Stock No	Registration	Make	PDI Performed	Model	Photos Taken	Body Style	Doors	Stocking Loan
----------	--------------	------	---------------	-------	--------------	------------	-------	---------------

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.

Technical	Custom Fields	Dates	Value / Checks	Job Card Requests	MOT History
Transactions					
Purchase Invoice	04/07/2020	Date In Stock	04/07/2020		
Sale Agreed		Agreed Delivery			
Sales Invoice		Delivered to Customer			
Payment Due		Date Due In	04/07/2020		
Record Creation Details					
Created On	06/07/2020	Created By	Gemma Jones		
Follow Ups					
Last Service		Service Due	07/11/2020		
RFL Due		MOT Due	30/11/2020		
Next Service Mileage		MOT Certificate			
Cambelt Next Due		Next Cambelt Mileage			
Calibration Next Due		Inspection			
Habitation Due		Habitation Mileage			

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.

Provenance & Valuation Options

Please select which items you would like to retrieve for this vehicle...

Per Lookup Options

☐ Auto Trader Valuation - £0.75

CAP Subscribers

☐ CAP Valuation

Experian Subscribers

☐ Autocheck Certificate

☐ Include Mileage Check

☐ CAP Valuation

☐ CAP Live Valuation

☐ Black Book Valuation

☐ Glass's Valuation

Data Guarantee Level: 10k

Data Guarantee Term: 12 Months

HPI Subscribers

☐ HPI Check

☐ HPI Warranty

☐ NMR Check

☐ NMR Details

☐ CAP Live Valuation

☐ Glass's Valuation

MotorCheck Subscribers

☐ MotorCheck Report

Select All Cancel OK

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.

Technical	Custom Fields	Dates	Value / Checks	Job Card Requests	MOT History
Provenance Checks					
Status		Warranty / Data Guarantee		View	
HPI Check - Last Checked: 02/10/2024					
					View
					Provenance
Valuations					
Type		Value			
Auto Trader Valuation - Last Checked: 02/10/2024					
Retail		29,681.00			
Private		26,280.00			
Trade		24,653.00			
Part Exchange Guide Price		24,530.00			
					Valuations

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.

Technical	Custom Fields	Dates	Value / Checks	Job Card Requests	MOT History	
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

MOT Comments

ClosePreviousNext

Type:ADVISORY

Comment:Nearside Front Upper Suspension arm pin or bush worn but not resulting in excessive movement (5.3.4 (a) (i))

Dangerous:False

***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](#).

Reconditioning Cost

Save

Cancel

Add Another

Delete

Cost Details

Description

windscreen part

Quantity

1

Supplier Ref

Supplier

AUTOSPAR

Miss Tiffany Case

Edit

Find

Clear

Net Cost Price

47.00

VAT Rate

20.00%

Total Gross Cost

56.40

☒ Do not post to Accounts

Sage Reference

Cost Date

20/08/2026

Purchase Nominal Code

5030

Notes

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.

The screenshot shows a web form titled "Raise Job Card Request". At the top, there are two buttons: "Cancel" and "Raise Job Card Request". Below the title bar, the form is divided into several sections. The "When:" section contains three radio button options: "On this date:" (selected), "ASAP:", and "No Rush:". The "On this date:" option has a text input field containing "02/10/2024". Below this, there are two date input fields: "MOT Due:" with the value "25/09/2025" and "Service Due:" which is empty. The "Requirements:" section contains three checkboxes: "PDI" (unchecked), "MOT" (checked), and "Service" (checked). To the right of these checkboxes is a button labeled "Insert Extras". Below the checkboxes is a text area containing the text "Respray front bumper" and "Replace all tyres".

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 screenshot shows a form titled "Job Card Request Email". It contains a label "Send Email to:" followed by a text input field containing the email address "support@dragon2000.co.uk".

Vehicle Record for: BD68TSX

508 PureTech GT
BD68TSX (U358930)
No Customer Selected

Close

£0 Vehicle Supplier Customer Apps CRM Advertising Additional Invoicing

Stock Number: U 358930

Registration: BD68TSX [Lookup](#)

Make: Peugeot

Model: 508

Variant: PureTech GT

Fuel Type: Petrol

Engine Size: 1.6 Engine No: FKA72503591

Body Style: Hatchback

Transmission: Automatic

Model Year: 2019

Technical Custom Fields Dates Value / Checks Job Card Requests MOT History

Search

Status	Requested By	Request Date	Details
Pending	Izzie	12/08/2026	MOT - Service - Respray front bumper and replace...

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](#).

Main Menu: Customers Suppliers New Vehicles **Used Vehicles** Service Parts Accounts

Create Vehicle Valuations Advertising Pre-Insurance Check Templates Utilities Finance Calculator

Search All -
Vehicles in Stock - (607 Records)
Reserved Stock - (278 Records)
Pending Part Exchanges - (26 Records)
Vehicles Sold - (6,056 Records)
Advertising - (202 Records)
Supplementary Invoices - (187 Records)
Job Card Requests - (17 Records)

Stock No	Registration	Make	Model	Sales Status	Description	Date Due	Request Status
U5000503	RK51XCS	Volkswagen	Passat Gt Tdi BlueMotion	Reserved	Service - Complete full service ready for sale	ASAP	Workshop
U5000614	DU55WCZ	Vauxhall	Meriva Life 16V Twinp...	For Sale	MOT -	ASAP	Pending
U5000539	YH56HMK	Ford	Transit 260 Swb Lr P...	Reserved	PD1 - MOT - Service - Please fit 165/70T/14 Hankook Tyre	ASAP	Booked In

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.

Bonus

Save Cancel Add Another Delete

Bonuses

Bonus Type: Test Bonus

Date: 02/10/2024

Supplier Reference: ABC123

Bonus Price: 150.00

VAT Rate: 20.00%

Total: 0.00

Supplier

Supplier: AUTO123 Auto123 Edit Find Clear

Nominal Code

Nominal Code: 4011

Sage Reference

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](#).

Vehicle Defaults	
Used Vehicle Defaults	
Purchase Type	Margin
Sale Type	UK Sale
RFL Supplier	DVLA
Default Template	Standard costs and extras
New Vehicle Defaults	
Purchase Type	Qualifying
Sale Type	UK Sale
RFL Supplier	DVLA
First Reg Fee	55.00
First Reg Fee Supplier	ACEGEARB
Default Template	Standard costs and extras
Auto Generate Cost for First Reg Fee?	☒

Write Downs

Write downs can be added to a vehicle record on the [Invoicing > Purchase screen](#).

Stock Value Write Downs	
Date	Value
01/03/2025	500.00
01/03/2026	750.00
Add Write Down	

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

Stock Value Write Down			
Save	Cancel	Delete	
Write Down Details			
Write Down Value	750.00	Depreciation Stock Control	1037
Write Down Date	01/03/2026	Cost of Stock Depreciation	5307
		Sage Reference	66

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.

← 👤 👤 🚗 🚗 🔧 🔧 💰 Men Menu Customers Suppliers New Vehicle Used Vehicle Service Pure Account							📞 📊 📱 🤝 🧠 📄 🏠 Type Payment Dashboard AppPage CRM Helpfile Reports Exit						
Back Create Enquiry Create Follow Up My Sales Diary Custom Worksheet Template Manager Finance Calculator							Rating List						
Prospecting Follow Ups							Pending Enquiries - (12 Records) All Open Enquiry Records - (236 Records) Agreed Sale - Awaiting Invoice - (41 Records) Hot Enquiries - (191 Records) Medium Enquiries - (2 Records) Cold Enquiries - (2 Records)						
Search All Prospects - Open Prospects Previous Prospects Current Matches Popular Vehicles - (89 Records) Test Drives - (61 Records)													
Prospecting - Hot Enquiries													
VSM 🔍 Clear Refresh													
Name		Enquiry Date		Contact Info		Sales Executive		Next Follow Up Date		Stock Type		Budget	
Mr David Davidson		22/08/2024		David@test.com		Test Employee		01/10/2024		Used		0.00	
Mrs Sarah Seaside		20/08/2024		seaside@test.com		Test Employee		08/10/2024		Used		0.00	
Mr Bob Bobbington		20/08/2024		Bob@test.com		Test Employee		07/10/2024		Used		250.00	

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.

Create New Prospect

Cancel

Existing Contact

Confirm

Account Name

Title

First Name

Last Name

Company

Post Code

House No

Telephone

Mobile

Email

Preferred

Record their Interest in a Stock Vehicle...

Record Interest

Stock No	Registr...	Make	Description
U2751	HY09UGU	Peugeot	207 1.6 Hdi Cc Gt

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 screenshot shows a web form titled "Enquiry for Mr Bob Bobbington". At the top, there are navigation buttons: "Cancel", "Previous", and "Next". The form is divided into two main sections. The first section, "Budget", contains a "Cash Buyer?" question with radio buttons for "No" (selected) and "Yes". Below this are input fields for "Per Month" (250.00), "Deposit" (2,000.00), "Term" (3 Years, with a dropdown arrow), and "Miles P/A" (15000). The second section, "Current Vehicle (Potential Part Exchange)", contains fields for "Registration" (NX57MWJ, with a "Lookup" button), "Make" (Audi, with a dropdown arrow), "Model" (A4, with a dropdown arrow), "Mileage" (with a unit selector for "Mls/Kms" or "Mls"), and "Settlement".

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

The screenshot shows the same web form, now at the "Set a Follow Up" step. The navigation buttons at the top are "Cancel", "Previous", and "Finish". The "Set a Follow Up" section includes a date field set to "22/08/2024" (selected with a radio button), a "Customer Due In" dropdown, "Start Time" (10:00, with a dropdown arrow), "End Time" (10:15, with a dropdown arrow), and an "Assign to" dropdown. Below this is the "Follow Up Details" section, which contains a large text area with the text "Customer due in for a test drive." and a "No Follow Up Needed" radio button at the bottom.

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.

The screenshot shows the 'Enquiry Record for: Mr Test Test' interface. The 'Activity' tab is selected, displaying a table of activities. The table has columns for 'Activity Date', 'Details', 'Next Follow Up', and 'Follow Up Date'. The first row shows an activity on 17/02/2024 at 15:22: 'Customer due in for a test drive.' with a 'Next Follow Up' of 'Test Drive' and a 'Follow Up Date' of '02/09/2024 10:00'. The second row shows an activity on 17/07/2024 at 15:22: 'Initial Enquiry Created' with 'Requirements L...' and 'N/A'. The left sidebar contains various fields for the enquiry, including 'Enquiry Level', 'Enquiry Date', 'Contact Name', 'Home Phone', 'Mobile Phone', 'Email', 'Sales Executive', 'Source of Customer', 'Interested In', 'Cash Buyer?', 'Per Month', 'Deposit', 'Term', 'Miles PA', 'PX Settlement', and 'Notes'. The 'Notes' field contains 'Initial Enquiry Created'. The top right has buttons for 'LOST SALE' and 'SALE AGREED'. The bottom right has buttons for 'Add Note' and 'Create Follow Up'.

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

The screenshot shows the 'Follow Up Details for Mr Test Test' interface. It has a 'Close' button at the top left and 'Forward' and 'Complete' buttons at the top right. The 'Follow Up:' section includes a 'CRM Cycle' dropdown set to 'None', a 'Vehicle' field with 'U6000701 - 0U65050' and an 'Open' button, and a 'For Who' dropdown. The 'Action' dropdown is set to 'Test Drive'. The 'Due' date is '02/09/2024'. The 'Reason' field contains 'Customer due in for a test drive.' There are buttons for 'Open Calendar', 'Open Contact', and 'Open Enquiry'. Below the 'Reason' field are buttons for 'Send Email', 'Send Text', and 'Add Note'. The 'Resolution:' section has a 'When' field set to '02/10/2024' and a 'Details' field. The 'Forwarded:' section has a table with columns 'Original Date', 'User', 'New Date', and 'Reason'.

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.

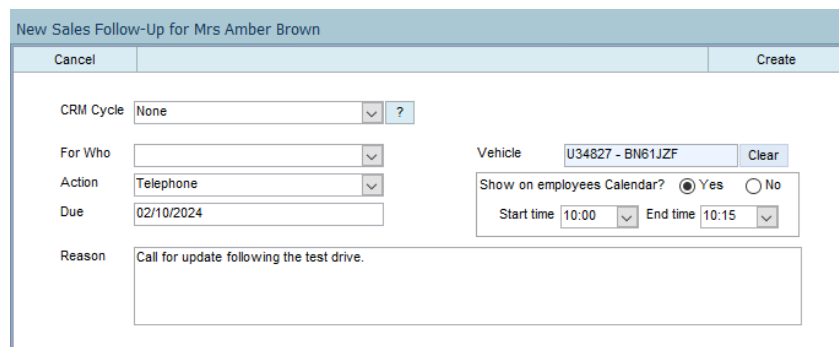
If you have been unable to contact the prospect, you can [Forward](#) the follow up for a select number of days. This will not close the follow up but will move the date on, based on the number of days selected.

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.



The screenshot shows a web form titled "New Sales Follow-Up for Mrs Amber Brown". At the top, there are "Cancel" and "Create" buttons. The form contains several fields: "CRM Cycle" is a dropdown menu set to "None" with a help icon; "For Who" is a dropdown menu; "Action" is a dropdown menu set to "Telephone"; "Due" is a date field set to "02/10/2024"; "Vehicle" is a text field containing "U34827 - BN61JZF" with a "Clear" button; "Show on employees Calendar?" has radio buttons for "Yes" (selected) and "No"; "Start time" and "End time" are time pickers set to "10:00" and "10:15" respectively. A "Reason" text area at the bottom contains the text "Call for update following the test drive."

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.

Man Menu

Customers

Suppliers

New Vehicles

Used Vehicles

Service

Parts

Accounts

Take Payment

Dashboard

Appraise

CRM

Helpdesk

Reports

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Create Enquiry

Create Follow Up

My Sales Diary

Custom Upload

Template Manager

Finance Calculator

Mailing List

Prospecting Follow Ups

Search All Prospects -

Open Prospects

Previous Prospects

Current Matches

Popular Vehicles - (127 Records)

Test Drives - (30 Records)

Pending Enquiries - (13 Records)

All Open Enquiry Records - (462 Records)

Agreed Sale - Awaiting Invoice - (14 Records)

Hot Enquiries - (301 Records)

Medium Enquiries - (2 Records)

Cold Enquiries - (73 Records)

Prospecting - Pending Enquiries

VRM

Clear

Filter All

Lead Source	Enquiry Date	Name	Contact Info	Interested in (Link)	Part Exchange Vehicle
Auto Trader Lead	17/04/2024	Mr James Wilkinson	0777777777	U126874459 - TESTREG1 - Vauxhall Astra Exclusiv Cdti Hatchback 1.7 Manual Diesel	
Auto Trader Lead	17/04/2024	Mr Gulam Mughal	0777777777	U126874459 - TESTREG1 - Vauxhall Astra Exclusiv Cdti Hatchback 1.7 Manual Diesel	Toyota Hiace
Auto Trader Lead	17/04/2024	Mr Ali Kurtoglu	0777777777	U126874459 - TESTREG1 - Vauxhall Astra Exclusiv Cdti Hatchback 1.7 Manual Diesel	
Auto Trader Lead	17/04/2024	Mr Berkan Kurtoglu	0777777777	U126874459 - TESTREG1 - Vauxhall Astra Exclusiv Cdti Hatchback 1.7 Manual Diesel	
Auto Trader Lead	16/04/2024	Mr Craig Shipton	0777777777	U126874459 - TESTREG1 - Vauxhall Astra Exclusiv Cdti Hatchback 1.7 Manual Diesel	
Website Lead	15/04/2024	Test Website Customer	0777777777	U434 - TESTREG2 - Alfa Romeo Giulietta 1750 Tbi Cloverleaf 1.7 Hatchback Manual Petrol	Skoda Rapid
Website Lead	15/04/2024	Test Website Customer	0777777777	U434 - TESTREG2 - Alfa Romeo Giulietta 1750 Tbi Cloverleaf 1.7 Hatchback Manual Petrol	Skoda Rapid
Website Lead	15/04/2024	Test Website Customer	0777777777	U434 - TESTREG2 - Alfa Romeo Giulietta 1750 Tbi Cloverleaf 1.7 Hatchback Manual Petrol	BMW 3 Series
Website Lead	15/04/2024	Test Website Customer	0777777777	U434 - TESTREG2 - Alfa Romeo Giulietta 1750 Tbi Cloverleaf 1.7 Hatchback Manual Petrol	Seat Ibiza
Website Lead	15/04/2024	Test Website Customer	0777777777	U434 - TESTREG2 - Alfa Romeo Giulietta 1750 Tbi Cloverleaf 1.7 Hatchback Manual Petrol	Seat Ibiza
Website Lead	15/04/2024	Test Website Customer	0777777777	U434 - TESTREG2 - Alfa Romeo Giulietta 1750 Tbi Cloverleaf 1.7 Hatchback Manual Petrol	Seat Ibiza
Website Lead	15/04/2024	Test Website Customer	0777777777	U1358 - TESTREG3 - Vauxhall Astra Cd 16v DualFuel 1.6 Sdi Hatchback Gas Bi Fuel	Fiat Punto
Website Lead	15/04/2024	Test Website Customer	0777777777	U12596 - TESTREG3 - Fiat Punto BV Active Sport Hatchback 1.2 Manual Petrol	Skoda Rapid

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.

		Auto Trader Lead From: Mr Gulam Mughal					
Close		Interested in: U126874459 - TESTREG1 - Vauxhall Astra Exclusiv Cdti Hatchback 1.7 Manual Diesel					
Enquiry Date		17/04/2024 09:59:30		Interested In...		Advertised Price	
Name		Mr Gulam Mughal		U126874459 - TESTREG1 - Vauxhall Astra Exclusiv Cdti Hatchback 1.7 Manual Die...		0.00	
Telephone		0777777777					
Email		@					
Message from Auto Trader [17/04/2024 09:59] Consumer - Is this car still available?				Part Exchange Vehicle (if entered)			
Registration		KV57FKP		Lookup			
Make		Toyota		Transmission		Manual	
Model		Hiace		Engine Number		2KD1667700	
Variant		280 Swb P/V D-4D 95		Model Series		HA8	
Body Style		Panel Van		Colour		Blue	
Mileage				Engine Size		2.5	
Date Registered		23/10/2023		Model Year		2023	
Chassis Number		FKP121JK1100039186		Number of Doors		0	
HPI Check Status Last Checked HPI Check							
CAP Valuation Retail Price Clean Price Average Price Poor Price Last Checked CAP Valuation							

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.

Enquiry Record for: Mr Gulam Mughal

Close Created 11/08/2026

Silent Salesman
 Send Video
 Finance Calc
 Take Deposit
 LOST SALE SALE AGREED

Enquiry Level: Hot Open Contact Record
 Enquiry Date: 11/08/2026 16:58:47
 Contact Name: Mr Gulam Mughal
 Home Phone:
 Mobile Phone:
 Email: @ Test@Test.com
 Edit Marketing Consent
 Sales Executive: Izzie
 Source of Enquiry:
 Interested In: Used
 Cash Buyer? ☒ No ☐ Yes
 Per Month: 0.00
 Deposit: 0.00
 Term (Months): 0
 Miles P/A: 0
 PX Settlement: 0.00
 Notes: Initial Enquiry Created

Activity	Deal Stacker	Vehicle Interests	Current Vehicle	Desired Vehicles
Description	Activity Date	Details	Next Follow ...	Follow Up D...
Deal Create...	11/08/2026 ...	Deal 570 created for N98 - Nissan Leaf E Plus Launch Edition	Deal Created	N/A
Requirement...	11/08/2026 ...	Initial Enquiry Created	Requirement...	N/A

Add Note Create Follow Up

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.

Activity	Deal Stacker	Vehicle Interests	Current Vehicle	Desired Vehicles			
Make	Model	Variant	Eng. Size	Body Style	Trans.	Colour	Year
Audi	A3			Convertible			
Add Vehicle							
Stock Matches - Stock Vehicles that Mr Henry Holland might be interested in...							
Make	Stock No.	Model	Variant	Eng. Size	Body Style	Trans.	Price
Audi	U35052	A3 Cabriolet	TDI Sport	1.6	Convertible	Manual	0.00
Prospect Matches - Prospects who have vehicles that Mr Henry Holland might be interested in...							
Cust...	Current Vehicle	CarMake	VehicleRange	VehicleTrim			
test4	Audi A3 TDI Black ...	Audi	A3	TDI Black Edition			

Any vehicles that 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:

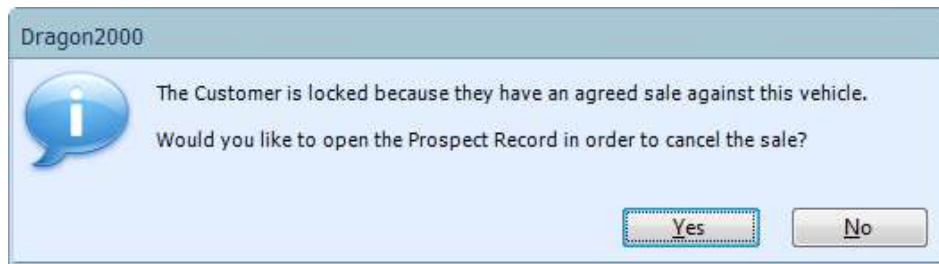


Select **Yes**, then choose the relevant deal (if you have more than one).

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:

Finance	
Default Deposit Percentage	10.00%
Default Term	60
Default Admin Fees	199.00
Flat Rate	7.00%
Option To Purchase Fee	10.00
Default Monthly Deposit	1,000.00
Default Minimum Payment	100.00
Default Maximum Payment	300.00
Finance Notification Email	
Use Finance Examples on Deal Stacker	☒ Yes ☐ No

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.

Finance Calculator	
Cancel	Create Prospect
Stock Vehicle	U34829
Finance Amount	8,500.00
Term	60
Deposit	850.00
£159.38 Per Month 60 Month Term	
Representative HP Quote	
First Monthly Payment	169.38
58 Payments of	159.38
Final Payment	358.38
Cash Price	8,500.00
Total Deposit	850.00
Total Amount of Credit	7,650.00
Interest Charges	1,912.50
Total Amount Payable	9,771.50
Fixed Rate of Interest (per annum)	5.00%
Representative APR	10.4%
Administration Fees	10.00
Option To Purchase Fee	199.00

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.

The screenshot displays the Sales Dashboard Overview. At the top is a navigation bar with icons for Main Menu, Customers, Suppliers, New Vehicles, Used Vehicles, Service, Parts, Accounts, Sales Payment, Dashboard, Appraise, CRM, Help/FAQ, Reports, and Exit. Below this is a sub-navigation bar with tabs: Create Enquiry, Create Vehicle, My Sales Diary, Finance Calculator, and Sales Profit. The main content area is divided into three sections: 'My Leads (Open Prospects)', 'My Reminders for Today', and 'My Notifications'. 'My Leads' shows a table with columns: Name, Interested In, Enquiry Date, Next Follow Up, and Status. 'My Reminders' shows a table with columns: Name, Follow Up Reason, and Follow Up Description. 'My Notifications' shows a list of alerts with icons. To the right of 'My Notifications' is a section titled 'Vehicles added in the last 5 days' with a table showing Stock No, Registration, Make, Model, Variant, Colour, Days In Stock, and Selling Price. Below this is a 'Scratch Pad' section.

Name	Interested In	Enquiry Date	Next Follow Up	Status
Mr Bob Bobbington	HYUNDAI - Peugeot 207 HDi Cc Ct	24/04/2024	24/04/2024	Hot - Open
Mrs Sarah Seaside		24/04/2024	26/04/2024	Hot - Open
Mr David Davidson		24/04/2024	27/04/2024	Hot - Open

Name	Follow Up Reason	Follow Up Description
No Reminders to Display		

Description
You have 12 new website enquiries...
There is 1 Customer Follow Up due today...
There are 6 Overdue Customer Follow Ups...
There are 9 Stock Vehicles that have MOTs Due in the next 30 days...
There are 9 Stock Vehicles that have MOTs overdue
There is 1 new Finance Proposal...

Stock No	Registration	Make	Model	Variant	Colour	Days In Stock	Selling Price
U6000551	PF1350C	Audi	Q5	Tdi Quattro	Black	1	0.90
U6000550	0667SSR	Mini	Mini Hatch	Cooper		1	0.90

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



Name	Follow Up Reason	Follow Up Date	Follow Up Description
Mary	Telephone	04/08/2025	Customer Due in for a Test Drive
Harriet Morris	Telephone	12/08/2025	Email to follow up enquiry
Mr Gulam Maghal	Telephone	13/08/2025	Customer coming to View Vehicle
James Cuthbert	Telephone	13/08/2025	Aftersales Followup Email to be sent

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

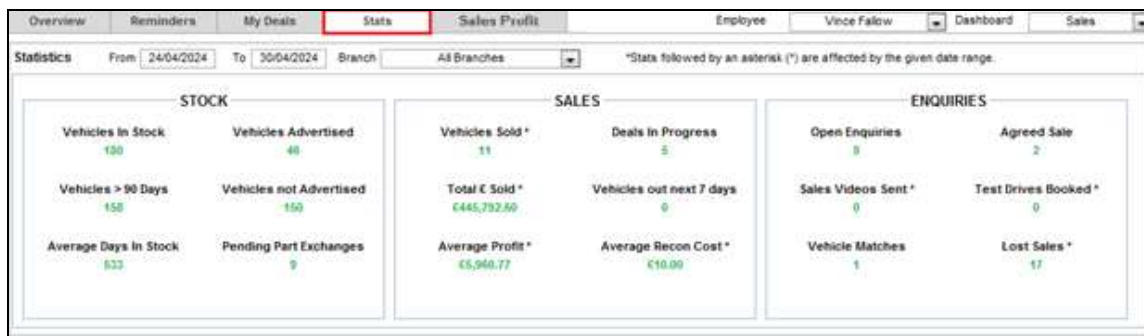


Deals In Progress						Completed Deals					
Customer	Stock No	Make	Description	Net Price	Agreed Delivery	Customer	Stock No	Make	Description	Net Price	Delivered
Mary	N96	Nissan	E Plus Launch Edition hatch 0 automatic E...	6,254.00		Mrs Jenny Green	U35408	Daimler	Limousine Saloon 4.2 Automatic Petrol	20,660.00	11/08/20...
Mr Roger Brown	U35602	Audi	55 S line SUV 5dr Electric Auto quattro 95...	1,050.00		Mr Jamie Morris	U358768	Abarth	1.3 5dr Car Manual Petrol	19,140.00	09/08/20...
James Cuthbert	U35674	Audi	5.2 FSI V10 Spyder 2dr Petrol S Tronic qua...	68,825.00	27/11/2024	Mr Ryan Kirby	U358311	Ford	1.4 TDCI Zetec Climate Hatchback 5dr Diesel ...	6,750.00	07/08/20...

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

Vehicle Details	Type	Selling Price	Purchase	VAT	Recon Cost	Net Profit	Finance	Warranty	Admin	Paint	Smart	GAP	TESTING	Extras	Total Profit	Customer	Invoice	Sold Date	Sale
U358998: KP25E...	Margin	7,800.00	1,700.00	1,114.26	150.00	4,835.74	0.00	0.00	99.00	0.00	0.00	0.00	0.00	0.00	4,934.74	Jason R...	1300	22/07/2...	
U358912: HV11Y...	Margin	1,000.00	2,000.00	0.00	150.00	-1,150.00	0.00	0.00	99.00	0.00	0.00	0.00	0.00	0.00	-1,051.00	Dragon...	1301	22/07/2...	
U358919: RV68P...	Margin	11,534.00	10,000.00	353.26	150.00	1,030.74	0.00	0.00	99.00	0.00	0.00	0.00	0.00	0.00	1,129.74	Mr John...	1309	29/07/2...	
U358933: KT74F...	Margin	17,000.00	15,000.00	430.92	390.00	1,179.08	0.00	0.00	99.00	0.00	0.00	0.00	0.00	0.00	1,278.08	Miss Is...	1315	04/08/2...	
U358930: BD68T...	Margin	100.00	1,000.00	0.00	150.00	-1,050.00	0.00	0.00	99.00	0.00	0.00	0.00	0.00	0.00	-951.00	Miss Ka...	1322	14/08/2...	

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

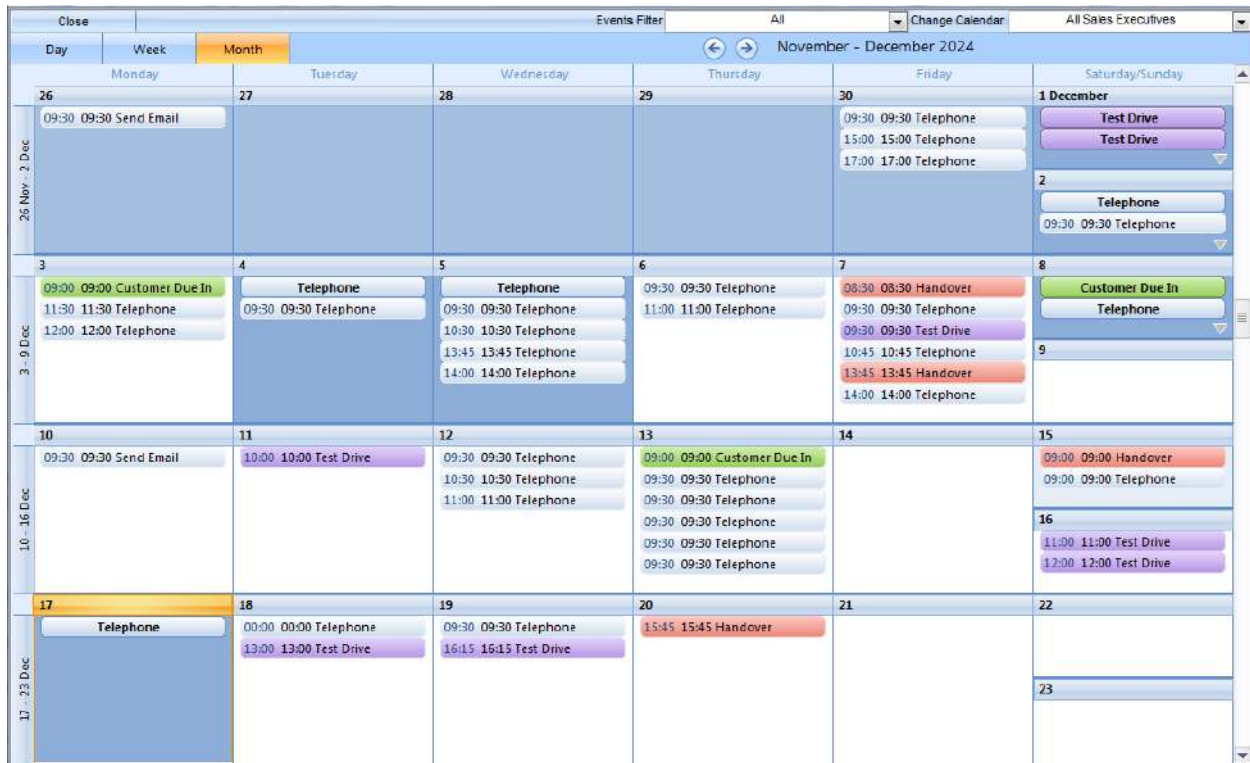
You can filter this by [Supplier](#), [Sale Type](#) and [Branch](#). Double clicking on a line will take you to the selected vehicle record to view the deal in more detail.

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.

New Sales Follow-Up for Mr John Smith	
Cancel	Create
CRM Cycle	None ?
Employee	Katie Clear
Vehicle	U35660 - YD69ZPP
Action	Test Drive
Due	05/12/2024
Reason	Ensure vehicle is cleaned prior to test drive.
Show on employees Calendar? ☒ Yes ☐ No	
Start time	15:00 Clear
End time	15:45 Clear
All Day Event ☐	

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.

Vehicle Record for: BN61JZF

A5 Tdi S Line Black Edition
BN61JZF (U34027)
No Customer Selected

0.00

Vehicle Supplier Customer Appraise CRM Advertising Additional Invoicing

Stock Number: U 04027
Registration: BN61JZF
Make: Audi
Model: A5
Variant: Tdi S Line Black Edition
Fuel Type: Diesel
Engine Size: 2.0
Engine No: CAH 237100
Body Style: Coupe
Transmission: Manual
Model Year: 2011
Number of Doors: 2
Model Series:
Description: A5 Tdi S Line Black Edition Coupe 2.0 Manual Die
Colour: Black
Interior:
Mileage: 91500
Mile/Kms: Mis/Kms
Date Registered: 01/09/2011
Chassis Number: WVAUZZZ6T2BA093276
Category: TCFC
Branch / Location: avonmouth
Parking Location:
Website URL:
Delivered to Customer:
Sales Status: For Sale

Create Enquiry
Matches Test Drives Interests

Calendar Events

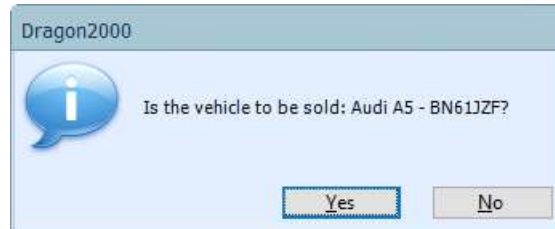
Created On	Due On	Event	Name
10/01/2018 16:00	11/01/2018 09:00	Customer Due In	Mrs Amber Brown

Back to Calendar

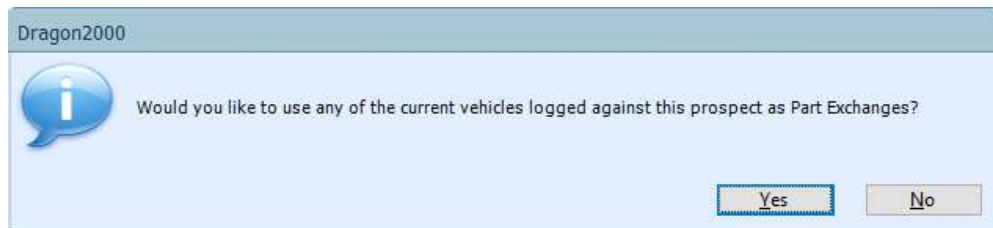
Sales Process - Selling a Vehicle

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.

Vehicle Record for: BF64TZP

Close **Focus Zetec** BF64TZP (U34829) **Mrs Amber Brown** 0.00 Vehicle Supplier Customer Appraise CRM Advertising Additional Invoicing

Stock Number U 04629
 Registration BF64TZP [Lookup](#)
 Make Ford
 Model Focus
 Variant Zetec
 Fuel Type Petrol
 Engine Size 1.0 Engine No EU09148
 Body Style Hatchback
 Transmission Manual
 Model Year 2014
 Number of Doors 5 Model Series MK3
 Description Focus Zetec Hatchback 1.0 Manual Petrol
 Colour Red
 Interior
 Mileage 28400 Mls/Kms Mls
 Date Registered 29/11/2014
 Chassis Number WFF0XGCBKEU08148 [Lookup](#)
 Category TCFC
 Branch / Location avonmouth
 Parking Location
 Website URL [Open](#)
 Delivered to Customer
 Sales Status Reserved
[Create Enquiry](#)
[Matches](#) [Test Drives](#) [Interests](#)

Customer History Transactions

Customer Details
 Customer Account BRO009 [Edit](#) [Find](#) [Clear](#) Delivery Name [Clear](#)
 Name Mrs Amber Brown Delivery Address 1
 Organisation Name Delivery Address 2
 Address 1 Delivery Town
 Address 2 Delivery County
 Town Delivery Post Code
 County Delivery Telephone
 Post Code Delivery Country
 Country
 Order Number Sales Executive
 Source of Customer

[Send Alert to Customer](#) [Send Text](#)

Customer Contact Information
 Type Contact Preferred Co...

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 / Costs	Service Costs	Finance / Warranty	Nominal Codes	Templates	Notes
Dealer Fitted Extras					
Description	Sales Nominal	Quantity	Unit Price	Net Total	
Supagard paint protection	0	1.00	240.00	240.00	
Tow Bar	0	1.00	95.00	95.00	
				Total	335.00
				Add Extra	

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.

Add Extra			
Save	Cancel	Add Another	Delete
Non Stock Part	Stock Part	Non Stock Oil	Stock Oil
Extra			
Extra Details			
Description	Paint protection	Sales Nominal Code	4302
Quantity	1	Net Selling Price	250.00
Category	Paint	% Discount Rate	0.00%
		Net Selling Total	250.00
		VAT Rate	20.00%
		Total Gross Amount	300.00
Cost Details			
Supplier	SUPAGARD	Edit	Find
Supplier Ref	1241	Clear	Sage Reference
☐ Do not post to Accounts	Net Cost Price	120.00	Cost Date
	VAT Rate	20.00%	Purchase Nominal Code
	Total Gross Cost	144.00	5302

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.

Extra		Save	Cancel	Add Another	Delete
Extra Details Description: Paint protection Category: Paint Admin: 20.00% Smart: 300.00		☒ Show In Sales ☐ Show In Service		Nominal Codes Used Vehicles Sales Nominal Code: 0000 Purchase Nominal Code: 0000 New Vehicles Sales Nominal Code: 0000 Purchase Nominal Code: 0000 Service Sales Nominal Code: Purchase Nominal Code:	
Cost Details Supplier: ☐ Do not post to Sage Net Cost Price: 0.00 VAT Rate: 20.00% Total Gross Cost: 0.00					

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.

Vehicle Sales Warranty		Save	Cancel	Add Another	Delete
Warranty Policy Standard Rate: 12.00% Higher Rate: 20.00% Sale To Customer Description: Used Car Warranty Expiry Date: 31/03/2018 Product Type: Warranty Product Net Selling Price: 0.00 Selling IPT Amount: 0.00 Total Selling Price: 0.00		Nominal Codes Sales Nominal Code: 4045 Purchase Nominal Code: 5030			
Cost to Dealership Supplier: CAR002 Cars R Us Purchase Date: 11/01/2018 Supplier Reference: ☐ Do not post to Sage Net Purchase Price: 0.00 Purchase IPT Amount: 0.00 Total Purchase Price: 0.00		Sage Reference:			

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.

IPT Calculation

[Close](#)

How purchase IPT amount is calculated

0.00	charged @ 20.00% =	0.00	
0.00	charged @ 12.00% =	0.00	
Total Purchase IPT		0.00	

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.

Vehicle Record for: OY17AXX

←

Q5 TDI S line
OY17AXX (U358909)
Mr Gulam Mughal

£15,000

Close
Vehicle
Supplier
Customer
Apps
CRM
Advertising
Additional
Invoicing

Stock Number U 358909

Registration OY17AXX Lookup

Make Audi

Model Q5

Variant TDI S line

Fuel Type Diesel

Engine Size 2.0 **Engine No** DETA051721

Body Style SUV

Transmission Automatic

Model Year 2017

Number of Doors 5 **Model Series**

Description 2.0 TDI S line SUV 5dr Diesel S Tronic quattro Euro

Colour Blue

Interior

Mileage Mls/Kms Mls

Date Registered 02/03/2017

Chassis Number WAUZX00X5H200677543 Lookup

Category Used

Branch / Location Silverstone 12

Parking Location

Website URL Open

Delivered to Customer

Sales Status For Sale

Select Action...
0
0
1

Matches
Test Drives
Interests

Purchase
Sales
Supplementary
Part Exchange
Payments
Deal Analysis

First Part Exchange

Add Vehicle
View Details

Stock Number

Registration

Make

Model

Description

Colour

Engine Size

Buying Price 0.00

VAT 0.00

Over Allowance 0.00

Stand In Value 0.00

Valuations
HPI

Appraisal Form

Confirm Part Exchange

Outstanding Finance

Settlement Due To

▼
New
Find
Clear

Agreement Number

Amount
0.00

Second Part Exchange

Add Vehicle
View Details

Stock Number

Registration

Make

Model

Description

Colour

Engine Size

Buying Price 0.00

VAT 0.00

Over Allowance 0.00

Stand In Value 0.00

Valuations
HPI

Appraisal Form

Confirm Part Exchange

Outstanding Finance

Settlement Due To

▼
New
Find
Clear

Agreement Number

Amount
0.00

Third Part Exchange

Add Vehicle
View Details

Stock Number

Registration

Make

Model

Description

Colour

Engine Size

Buying Price 0.00

VAT 0.00

Over Allowance 0.00

Stand In Value 0.00

Valuations
HPI

Appraisal Form

Confirm Part Exchange

Outstanding Finance

Settlement Due To

▼
New
Find
Clear

Agreement Number

Amount
0.00

Page 55

Create Part Exchange Record

Cancel Confirm

Registration

Make

Model

Variant

Fuel Type

Engine Size

Body Style

Transmission

Model Year

Use an Existing Record

Stock Number

Template

Part Exchange with Stock No: U34829

Close History

Stock Number

Registration

Make

Model

Variant

Fuel Type

Engine Size

Body Style

Transmission

Model Year

Number of Doors Model Series

Description

Colour

Interior

Mileage Mls/Kms Mls

Date Registered

Chassis Number

Category

Location

Engine Number

Vehicle Group

Purchase Type

Sales Type

Sales Status

Date in Stock

Last Service

RFL Due

Service Due

MOT Due

Advertised Price

Website Price

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.

First Part Exchange

Stock Number

Registration

Make

Model

Colour

Engine Size

Buying Price

VAT

Over Allowance

Stand In Value

Outstanding Finance

Settlement Due To

FINANCER

Agreement Number

Amount

PX with no over allowance

Second Part Exchange

Stock Number

Registration

Make

Model

Colour

Engine Size

Buying Price

VAT

Over Allowance

Stand In Value

Outstanding Finance

Settlement Due To

FINANCER

Agreement Number

Amount

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.

Extras / Costs	Service Costs	Finance / Warranty	Nominal Codes	Templates	Notes
Vehicle Sale - Finance					
Finance Company		FINANCER v Edit Find Clear			
Sales Price		10,200.00			
Finance Amount		10,000.00			
Finance Type		v		Flat Rate	
Duration				APR	
Monthly Payments				Doc Fee	
Charge for Credit				Other	
Finance Start Date				Finance Commission 0.00 Delete	
Finance Expiry				Agreement Number	
				PPP Commission 0.00	

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](#).

Take Payment

Cancel

Options

Customer

Customer Details:

Account

AAWARRA1

Edit

Find

Clear

Name

AA Warranty

Organisation Name

AA Warranty

Method:

☒ Credit Card

☐ Debit Card

☐ Other...

☒ Use Card Machine:

Front Desk

* Clover Terminal selected

Click "Take Payment" to set the amount

Invoice Type	Date	Reference	Outstanding
Vehicle Invoice	24/09/2024	Inv No. 902 U35640 RE20MRY - BMW 1.5 116d M Sport Hatchback 5dr ...	18,151.82

New...

Totals18,151.82

Payment Link

Take 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.

Payment Details

Save

Cancel

Print Receipt

Payment Details

Payment Amount

5,000.00

Payment Method

BACS (Banktransfer)

Payment Date

10/10/2024

Reference

Nominal Code

Bank Nominal

1200

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](#).

Take Payment

Cancel

Options

Customer

Finance

Finance Company Details:

Account

FINANCER

▼

Edit

Find

Clear

Name

Financer

Organisation Name

Financer

Method:

☒ Credit Card

☐ Debit Card

☐ Other...

☒ Use Card Machine:

Front Desk

▼

* Clover Terminal selected

Click "Take Payment" to set the amount

Invoice Type	Date	Reference	Outstanding	Payment Amount
Vehicle Finance Invoice	24/09/2024	Inv No. 11 U27 PG18FAC - Honda 1.6 i-DTEC SE Hatchback 5...	5,000.00	0.00
Totals			5,000.00	0.00

Vehicle Deposit...

Remove Deposit

Pay All

Pay Selected

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

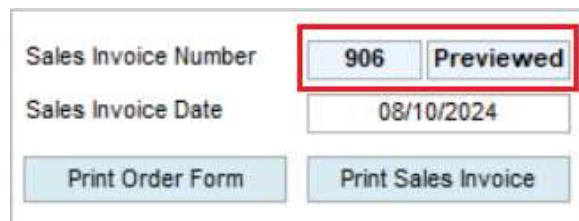
[Go to Invoicing > Sales](#)

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

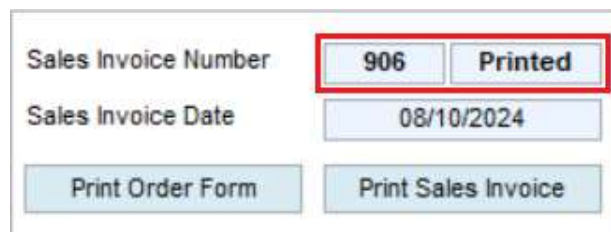
[Go to Invoicing > Sales](#)

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.



A screenshot of a web form for a Sales Invoice. The form has two rows of input fields. The first row is 'Sales Invoice Number' with a text box containing '906' and a button labeled 'Previewed'. The second row is 'Sales Invoice Date' with a text box containing '08/10/2024'. Below these are two buttons: 'Print Order Form' and 'Print Sales Invoice'. A red rectangular box highlights the '906' and 'Previewed' elements.

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.



A screenshot of the same Sales Invoice form as above, but the status button now says 'Printed' instead of 'Previewed'. The red rectangular box still highlights the '906' and 'Printed' elements.

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.

Add Extra			
Save	Cancel	Add Another	Delete
Non Stock Part	Stock Part	Non Stock Oil	Stock Oil
Extra			
Extra Details			
Description	Set of Mats	Sales Nominal Code	4302
Quantity	1	Net Selling Price	34.00
Category		% Discount Rate	0.00%
		Net Selling Total	34.00
		VAT Rate	20.00%
		Total Gross Amount	40.80
Cost Details			
Supplier	CAR002	Cars R Us	Edit Find Clear
Supplier Ref	2356	Net Cost Price	24.75
☐ Do not post to Accounts		VAT Rate	20.00%
		Total Gross Cost	29.70
		Sage Reference	
		Cost Date	10/10/2024
		Purchase Nominal Code	5302

[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.](#)

Purchase	Sales	Supplementary	Part Exchange	Payments	Deal Analysis
----------	-------	---------------	---------------	----------	---------------

Days In Stock

Purchase Price

Part Exchanged With

PX Over Allowance

Stand In Value

Less Write Down

Plus Total Costs

Plus Stock Extra Costs

Stand In Value

Less Over Allowance

Margin VAT ?

Purchase IPT

Total Expenditure

Cost VAT

Selling Price

Discount

Delivery Charge

Extras ?

RFL

Cherished Transfer

IPT Warranty

Additional Discount

Sale IPT

Total Price

Vehicle Profit

Bonus

Bonus VAT

Finance Commission

PPP Commission

Full Profit Total

Sales VAT

All Vehicle Costs including Internal Services

Description	Net Total
No Costs to Display	

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.

1. Mailshot Criteria
Select the demographic for your Mailshot. For example:
I am writing to Customers - Who have bought Used Vehicles
I am writing to
who have bought
☒ Remove Duplicate Contacts

2. Advanced Criteria
Use the Advanced Criteria to drill down into the specific details about the demographic. The options below are based on the options selected above in Mailshot Criteria.

Field	Expression	Value
Sale Date	is equal to or more than	01/10/2024
and Sale Date	is less than or equal to	31/10/2024
and		
and		

TIP: Before clicking the Load > button, enter one or more characters in the Value box to just load values beginning with those characters

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.

3. Method of Contact

Select the method of your Mailshot.

☒ **Letters**
Those with an address and not opted out of postal marketing

☐ **Text Messages**
Those with mobile numbers and not opted out of SMS marketing

☐ **Emails**
Those with an Email address and not opted out of Email marketing

☐ **Call Sheet**
Those with a telephone number and not opted out of telephone marketing

☐ **3rd Party Mailer**
This will produce a CSV but log '3rd Party Mailer' in the customers record as the contact method

☐ **Labels**

View who will receive mailshot

View who will NOT receive mailshot

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 at 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).

CRM Cycle - sales follow up

Save Cancel Delete Cycle

Cycle Name sales follow up

Cycle Type Sales

Cycles Steps (Double Click to edit - Click and drag to reorder)

Step Name
Initial telephone call
standard 1 week sales letter
3 month call
6 month letter

Step Details

Name Initial telephone call

Due 3 Days After First Step

Action Telephone

Details Call customer to after sales follw up.

Add Step Delete Step Save Step

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.

New Sales Follow-Up for Mrs Amber Brown

Cancel

Create

CRM Cycle

Sales Follow Up

▼

?

For Who

Andrew

▼

Action

Telephone

▼

Due

14/01/2024

Vehicle

U34827 - BN61JZF

Clear

Show on employees Calendar?

☒ Yes

☐ No

Start time

08:00

▼

End time

08:15

▼

Reason

Courtesy call to customer following sale to find out how they are getting on.

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.

Activity	Deal Stacker	Vehicle Interests	Current Vehicle	Desired Vehicles	
Description	Activity Date	Details	Next Follow Up	Follow Up Date	
Telephone b...	10/10/2024 0...	Courtesy call to custoemr following sale to find out how they are getting on.	Telephone	11/10/2024	
Telephone b...	10/10/2024 0...	Customer due in for Test Drive	Telephone	07/10/2024 0...	
Requirement...	10/10/2024 0...	Initial Enquiry Created	Requirement...	N/A	
Add Note Create Follow Up					

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](#).

Valuations

CAP Bulk Valuations

Registration

Mileage

Valuation Provider

BN61JZF

91500

Auto Trader Adjusted Valuation - £0.00

Lookup

vehicle info

Previous Valuations

Type	Value
No Valuation Lookups have been run on this vehicle...	

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](#).

Close

Valuations

CAP Bulk Valuations

CAP Value Multiple Stock Vehicles - Requires additional licence

☐ Do not list vehicles already updated this month

Stock No	Registration	Chassis No	Make	Model	CAP Date
U500	YY15EOK	VF70BBHYBEE539854	Citroen	C4 Cactus	25/01/2016
U1234	OE62HGM	SALLDHP7DA430046	Land Rover	Defender 110 Hard ...	02/06/2026
U1323	BG60KVX	WAUZZZ8P6BA059938	Audi	A3	25/01/2016
U7122	HN66ZGZ	VNKKJ3D370A400490	Toyota	Yaris	
U30084	CE57RKF	WMWMMF72030TT37876	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

Vehicles with no mileage are not listed

Deselect All

Select All

CAP Selected Vehicles

* 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](#).

[VRM](#)

[Clear](#)

[Show All](#)

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

VRM Lookup Result

[←](#)
Close

[Report](#)

[Create](#)

Main

Additional

Technical

VRM Result For BN61JZF

Make	Audi	Engine Number	CAH 237100
Model	A5	CO2	134
Variant	Tdi S Line Black Edition	Speed	140
Fuel	Diesel	0-62MPH Time (Secs)	8.3
Engine Size	2.0	Max Power (BHP)	168
Body Style	Coupe	Torque (lb/ft)	258
Transmission	Manual	MPG (Combined)	55.4
Model Year	2011	MPG (Urban)	45.6
Number of Doors	2	MPG (Extra Urban)	64.2
Model Series		Previous Owners	4
Description	A5 Tdi S Line Black Edition Coupe 2.0 Manual Diesel	Date Registered	01/09/2011
Colour	Black	Last V5 Issued	01/04/2016
Chassis Number	WAUZZZ8T2BA098278	MOT Expiry	28/11/2018

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.

**FROM** **Dragon2000**
Leadership 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
							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

**ABC 123**

REF: **P33851P**
DATE: 29/10/2018
DEALER:

Vehicle History Check

LAND ROVER RANGE ROVER SP HSE TDV6 A SILVER, 2009



Minor issues

1 **Keepers**
More keepers than average

1 **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.

Margin VAT	
Close	
How Margin VAT is calculated	
Selling Price	8,500.00
	+
Delivery Charge	0.00
	+
Extras	0.00
	-
Purchase Price	7,000.00
Margin VAT Calculated On	= 1,500.00
	/ (1 + 0.2)
	= 1,250.00
	* 0.2
Margin VAT	= 250.00

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