



MENTOR USER GUIDE

CLASSIFICATION: PUBLIC

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Mentor User Guide

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Home Page

Depending on your user level and account permissions you will be directed to a particular branch and screen.

- Show/hide the navigation menu (1)
- Click links to navigate around the current module (2)
- Modules the user has access to. Select Module to change menu options (3)
- Current branch name. Select to access other branches of the company (4)
- Select your username to update your user profile, change password, change branch or logout (5)
- System Warnings display important tasks, import/export of data from external systems/manufacturers. Incomplete records is a snapshot of current system data completeness (6)
- Active Wizard Campaigns displays current running marketing campaigns (7)




















Depending on the module you work in different home screens will be displayed to the user.

Actions

Top Action Bar

Dependant on user and role permissions the top action tool bar displays available options to the user



-  Show/Hide main side menu
-  Return to default home screen
-  Add Customer - Retail/Fleet
-  Edit Selected Customer
-  Delete Selected Customer (with permission)
-  Find Customers - Advanced Search Tool
-  Print - Customer Details, Range Details, Labels
-  Write Letter/Email, Send SMS message
-  Campaign Wizard – Create, Build and send Marketing Campaigns with monitored results
-  Customer Activity – Record interactions with customers
-  Presentations – Customer Video presentations
-  Build Order Form/Quote
-  Toggle between List/Customer View
-  Profit Scout Calculator, Fuel Economy Comparison Tool
-  Links to External Websites
-  FCA Module, Demands and Needs, FCA Complaints, IDD register and print
-  Mencom internal communications tool

Loading a Customer: Retail/Fleet



To load a new customer, select the Add Customer icon from the Action bar. Customers can be differentiated as retail or fleet options.

Capture the customer information on the following form and save when complete. Prompts for additional missing information may be requested. Further customer information may be added and built up over time using the additional tabs, Additional Contacts, Company Details, Notes and Addresses.

Add Customer

Main Details | Additional Contacts | Company Details | Notes | Addresses

Reference :

Customer Type : Contact Address : Source of Enquiry :

Contact Details

Title : Gender : ☐ Male ☐ Female

First Name : Last Name :

Postcode : Number : House Name :

Address Line 1 : Address Line 2 : Address Line 3 : Address Line 4 : City :

County :

Home Tel : Work Tel : Mobile : Fax :

Email : No Email : ☐ Date of Birth :

Motability : Type Of Business : Service Only :

Data Protection Act Statement and Contact Preferences for Future Events & Offers

"Your personal data will be processed according to DPA 1998, GDPR 2018 and the data protection policy and guidelines of CRM Company. The data collected will be held by us for the purpose of administration and informing you of future events and offers. You are giving your consent to be contacted."

By Telephone : By Letter : For Service Reminders :

By SMS : By Email : By Retailer and Manufacturer :

By 3rd Party Organisations :

Once Save has been selected a duplicate check will be performed on the freshly loaded customer. If a potential duplicate customer is found to already exist it will be displayed. Select the matching record (if any) the new information just loaded will be merged into this existing record and saved. You can only select matching records loaded at your branch

Why we capture information:

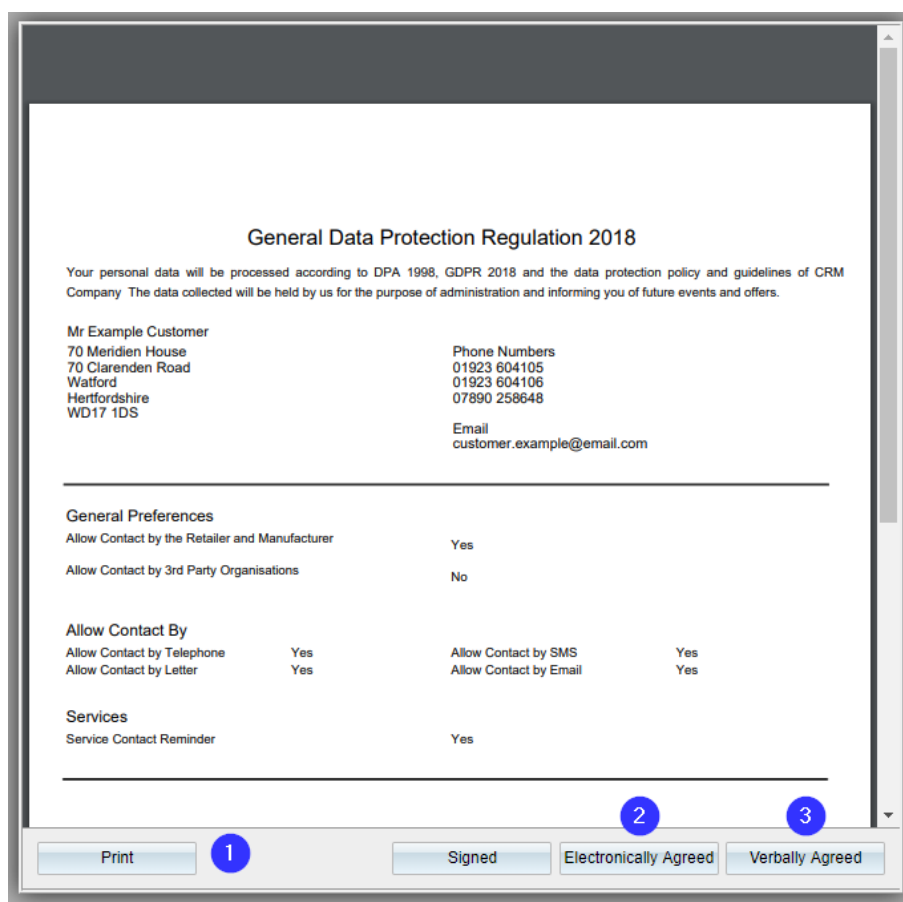
Capturing critical customer information is key to the sales process. The more information we enter and hold against a customer the more we can do with this customer. Remember, not every enquiry will lead to a deal, with every piece of information about that customer we can send letters, emails and SMS messages and remain in contact.

GDPR Statement

When the customer record has been saved the GDPR regulations form will be displayed. Dependant on your companies GDPR policy you can record the customers consent.

Customers can give you consent by:

- A. Printing out the GDPR form and signing it
- B. Electronically giving consent
- C. Verbally agreeing consent



General Data Protection Regulation 2018

Your personal data will be processed according to DPA 1998, GDPR 2018 and the data protection policy and guidelines of CRM Company. The data collected will be held by us for the purpose of administration and informing you of future events and offers.

Mr Example Customer
 70 Meridien House
 70 Clarendon Road
 Watford
 Hertfordshire
 WD17 1DS

Phone Numbers
 01923 604105
 01923 604106
 07890 258648

Email
 customer.example@email.com

General Preferences

Allow Contact by the Retailer and Manufacturer	Yes
Allow Contact by 3rd Party Organisations	No

Allow Contact By

Allow Contact by Telephone	Yes	Allow Contact by SMS	Yes
Allow Contact by Letter	Yes	Allow Contact by Email	Yes

Services

Service Contact Reminder	Yes
--------------------------	-----

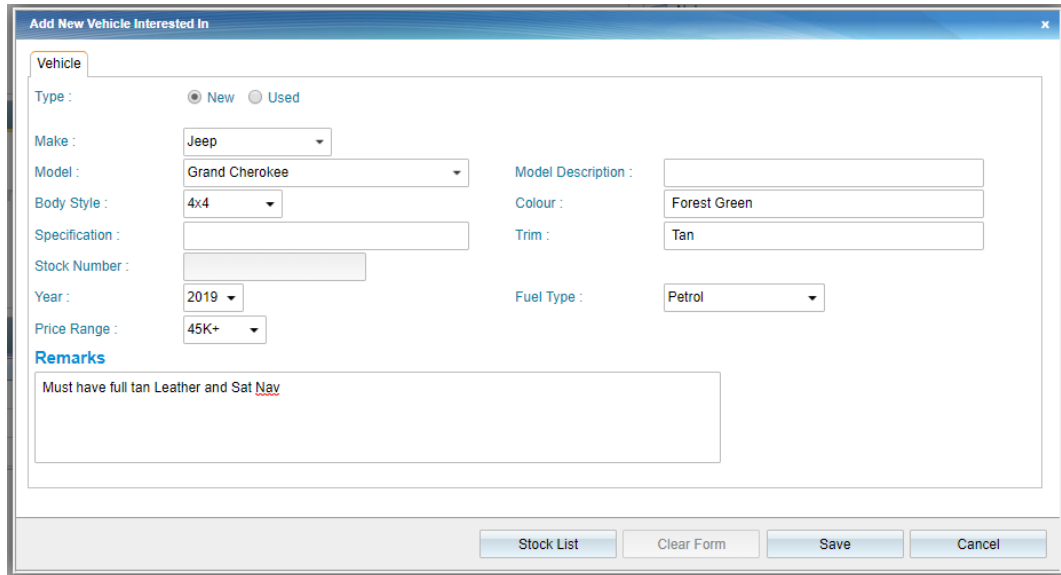
1
 2
 3

The consent type is recorded against the customer record for future reference and Mentor adheres to the customers agreed consent preferences.

Adding an Interested Vehicle

Once the customer has been loaded and the GDPR contact preferences recorded the Add New Vehicle Interested In will be displayed.

Record the details of the vehicle that the customer is interested in and any special requirements.



Add New Vehicle Interested In

Vehicle

Type: ☒ New ☐ Used

Make:

Model:

Body Style:

Specification:

Stock Number:

Year:

Price Range:

Model Description:

Colour:

Trim:

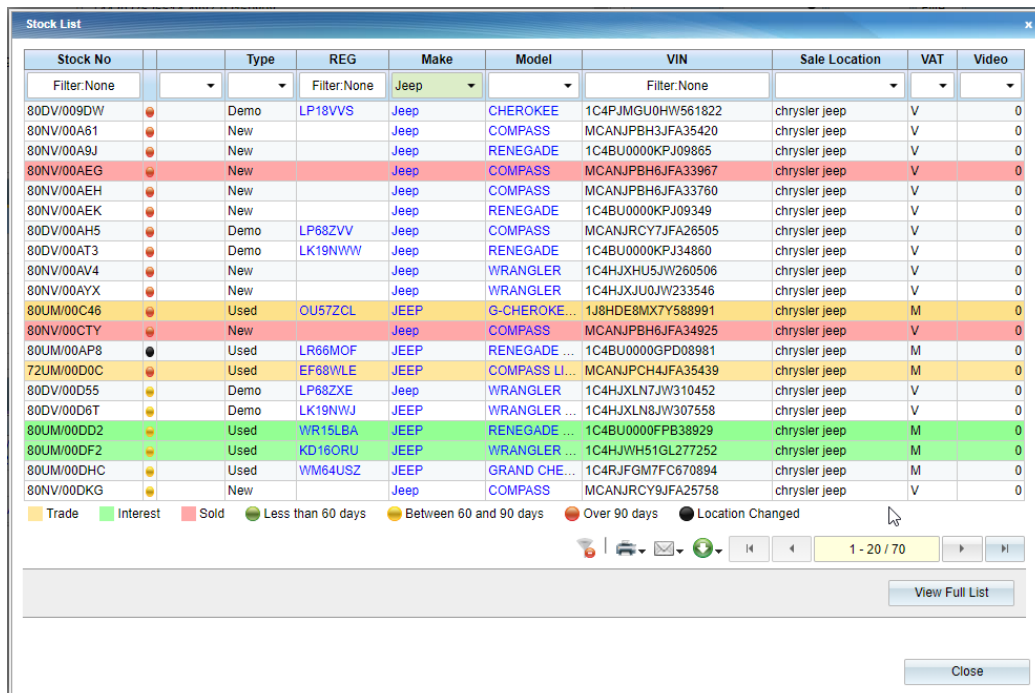
Fuel Type:

Remarks

Must have full tan Leather and Sat Nav

Stock List Clear Form Save Cancel

If the vehicle the customer is interested in is in the current group stock it can be selected directly from the stock list.



Stock No	Type	REG	Make	Model	VIN	Sale Location	VAT	Video
Filter:None		Filter:None	Jeep		Filter:None			
80DV/009DW	Demo	LP18VVS	Jeep	CHEROKEE	1C4PJMGU0HW561822	chrysler jeep	V	0
80NV/00A61	New		Jeep	COMPASS	MCANJPBH3JFA35420	chrysler jeep	V	0
80NV/00A9J	New		Jeep	RENEGADE	1C4BU0000KPJ09865	chrysler jeep	V	0
80NV/00AEG	New		Jeep	COMPASS	MCANJPBH6JFA33967	chrysler jeep	V	0
80NV/00AEH	New		Jeep	COMPASS	MCANJPBH6JFA33760	chrysler jeep	V	0
80NV/00AEK	New		Jeep	RENEGADE	1C4BU0000KPJ09349	chrysler jeep	V	0
80DV/00AH5	Demo	LP68ZVV	Jeep	COMPASS	MCANJRCY7JFA26505	chrysler jeep	V	0
80DV/00AT3	Demo	LK19NWW	Jeep	RENEGADE	1C4BU0000KPJ34860	chrysler jeep	V	0
80NV/00AV4	New		Jeep	WRANGLER	1C4HJXHU5JW260506	chrysler jeep	V	0
80NV/00AYX	New		Jeep	WRANGLER	1C4HJXJU0JW233546	chrysler jeep	V	0
80UM/00C46	Used	OU57ZCL	JEEP	G-CHEROKE...	1J8HDE8MX7Y588991	chrysler jeep	M	0
80NV/00CTY	New		Jeep	COMPASS	MCANJPBH6JFA34925	chrysler jeep	V	0
80UM/00AP8	Used	LR66MOF	JEEP	RENEGADE ...	1C4BU0000GPD08981	chrysler jeep	M	0
72UM/00D0C	Used	EF68WLE	JEEP	COMPASS LI...	MCANJPCH4JFA35439	chrysler jeep	M	0
80DV/00D55	Demo	LP68ZXE	Jeep	WRANGLER	1C4HJXLN7JW310452	chrysler jeep	V	0
80DV/00D6T	Demo	LK19NWW	Jeep	WRANGLER ...	1C4HJXLN8JW307558	chrysler jeep	V	0
80UM/00DD2	Used	WR15LBA	JEEP	RENEGADE ...	1C4BU0000FPB38929	chrysler jeep	M	0
80UM/00DF2	Used	KD16ORU	JEEP	WRANGLER ...	1C4HJWH51GL277252	chrysler jeep	M	0
80UM/00DHC	Used	WM64USZ	JEEP	GRAND CHE...	1C4RJFGM7FC670894	chrysler jeep	M	0
80NV/00DKG	New		Jeep	COMPASS	MCANJRCY9JFA25758	chrysler jeep	V	0

Trade Interest Sold Less than 60 days Between 60 and 90 days Over 90 days Location Changed

1 - 20 / 70

View Full List

Close

Save the vehicle interested record.

Why we capture which car the customer is interested in:

Capturing which vehicle the customer is interested in is a critical piece of information, knowing which vehicles 10,000 customers enquired about this year is like gold. We can predict which new vehicles sell the best which used vehicles sell the best, which price range gets the most enquiries. All of this information allows the business to have the correct stock so when that customer wants a vehicle we can supply it.

Recording Customer Activity

Every customer interaction should be recorded, along with the method of contact and the next action that needs to be undertaken. Ensure you use the correct actions for the customer interaction you are recording. Using the incorrect action can create false enquiry's reducing your sales conversion statistics or it can trigger the customer to be incorrectly transmitted to the manufacturer as a lead which may impact on branch performance.

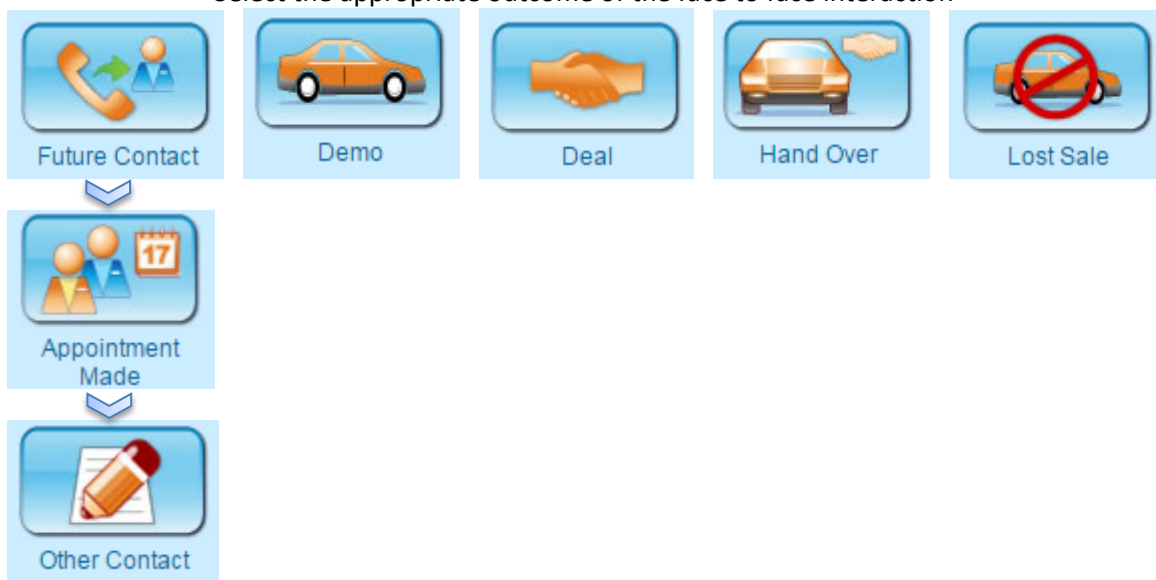


To record customer interactions select the Customer Action icon from the Action bar

Face to Face Interactions



Select the appropriate outcome of the face to face interaction



Telephone Interactions



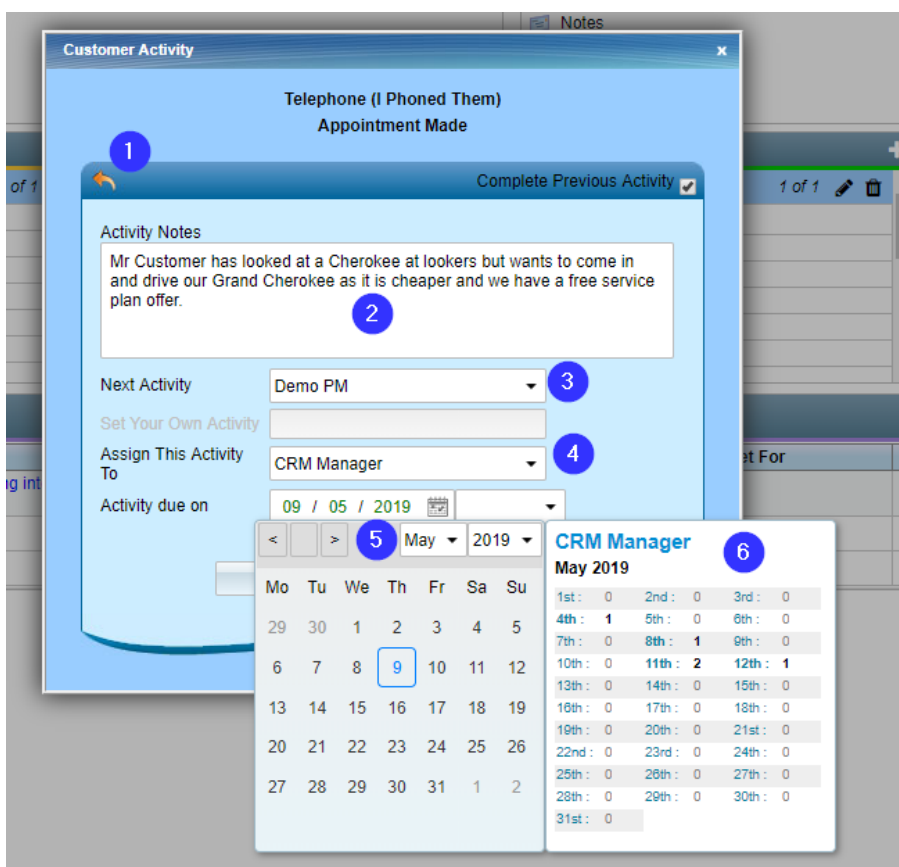
Select the direction of the call or record prospecting and deal stacking






Recording Customer Activity Cont'd.....

- A. Back arrow (1)
- B. Activity notes, enter the details of the interaction with the customer (2)
- C. Select the next activity from the dropdown list that will occur with the customer (3)
- D. By default activities are set for the user currently logged in but the activity can be assigned to another user if required. (4)
- E. Record the due date and time of the activity, the calendar display shows the number of activities set to aid in user diary management (5,6)



Customer Activity

Telephone (I Phoned Them)
Appointment Made

1  Complete Previous Activity ☒

Activity Notes

Mr Customer has looked at a Cherokee at lookers but wants to come in and drive our Grand Cherokee as it is cheaper and we have a free service plan offer.

2

Next Activity Demo PM 3

Set Your Own Activity

Assign This Activity To CRM Manager 4

Activity due on 09 / 05 / 2019 5

CRM Manager 6

May 2019

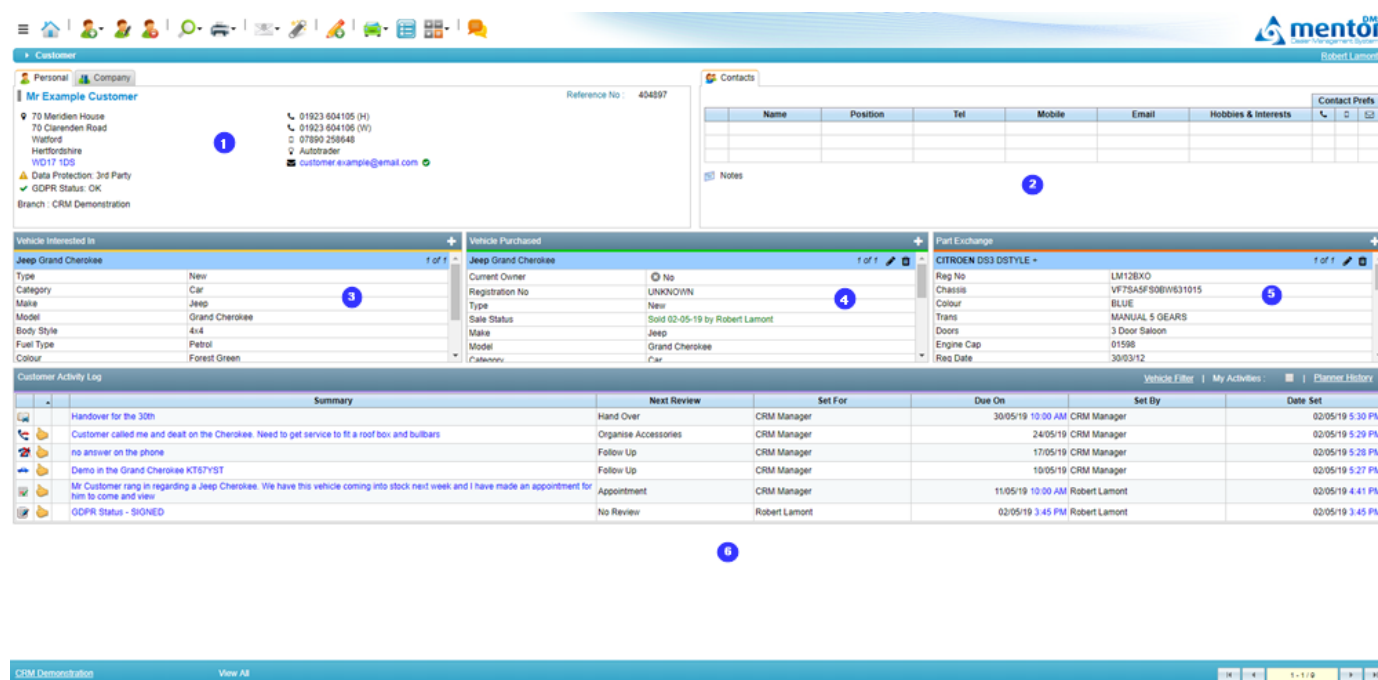
Mo	Tu	We	Th	Fr	Sa	Su
29	30	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2

1st : 0	2nd : 0	3rd : 0
4th : 1	5th : 0	6th : 0
7th : 0	8th : 1	9th : 0
10th : 0	11th : 2	12th : 1
13th : 0	14th : 0	15th : 0
16th : 0	17th : 0	18th : 0
19th : 0	20th : 0	21st : 0
22nd : 0	23rd : 0	24th : 0
25th : 0	26th : 0	27th : 0
28th : 0	29th : 0	30th : 0
31st : 0		

Customer Card View

All of the customer information is presented on one easy to read screen.

- A. Customer contact details and contact preferences (1)
- B. Additional contacts attached to the customer record (2)
- C. Vehicle interested in (3)
- D. Vehicle purchased (4)
- E. Part exchange (5)
- F. Customer activity log (6)



Customer Communications (Email, SMS, Letter)

Mentor hosts a full communications suite so you can communicate with customers via multiple methods. All customer communications are recorded in the customer activity log for future reference.



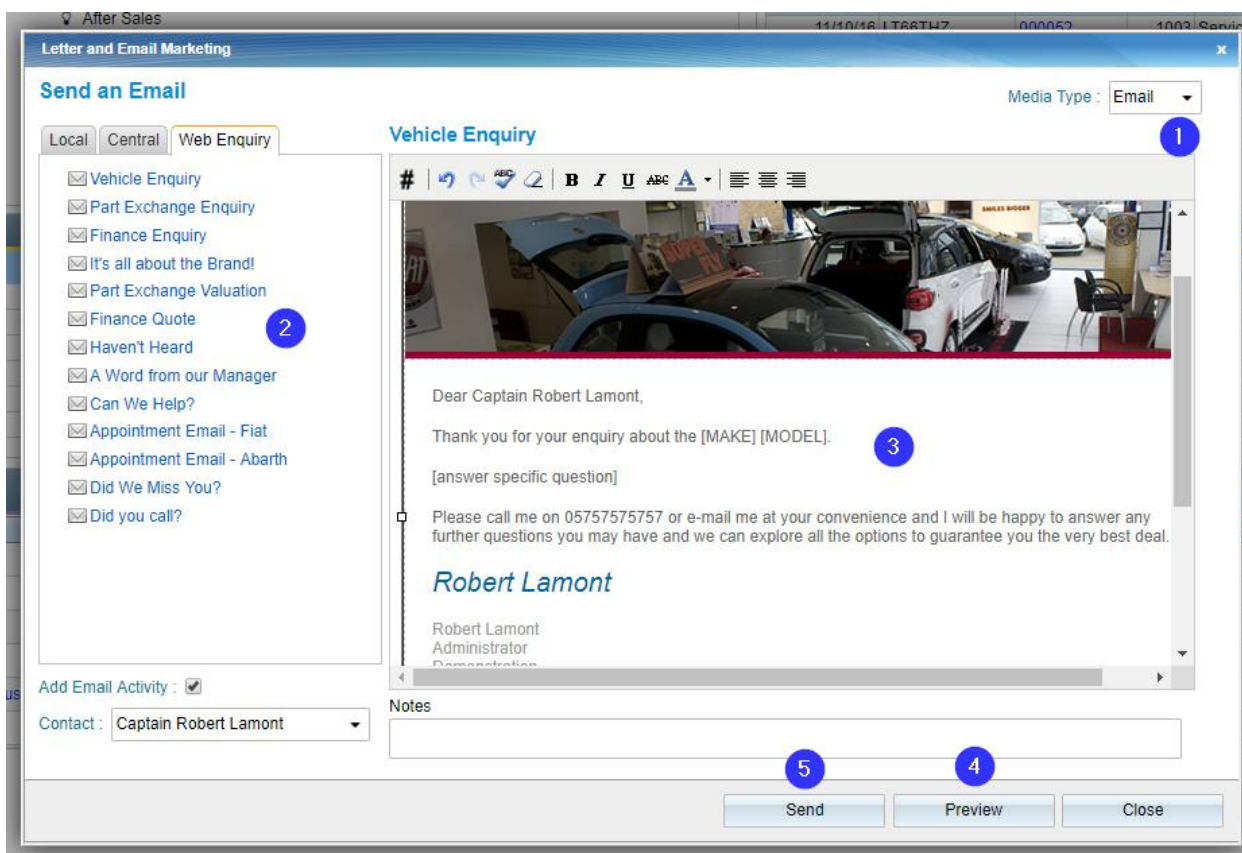
Select the communication method from the top toolbar

- A. Write Letter/Email
- B. Send an SMS

Write Letter/Email

The write Letter/Email option allows users to select a pre-loaded template or type a free text email to a customer.

- A. Select the media type, Letter/Email (1)
- B. Select the template from the list or free type in the editor (2)
- C. Mail merge fields can be included to personalise the template to the specific customer (3)
- D. Details in the template can be edited by the user (3)
- E. Preview the template to your email address (4)
- F. Send to the selected customer (5)

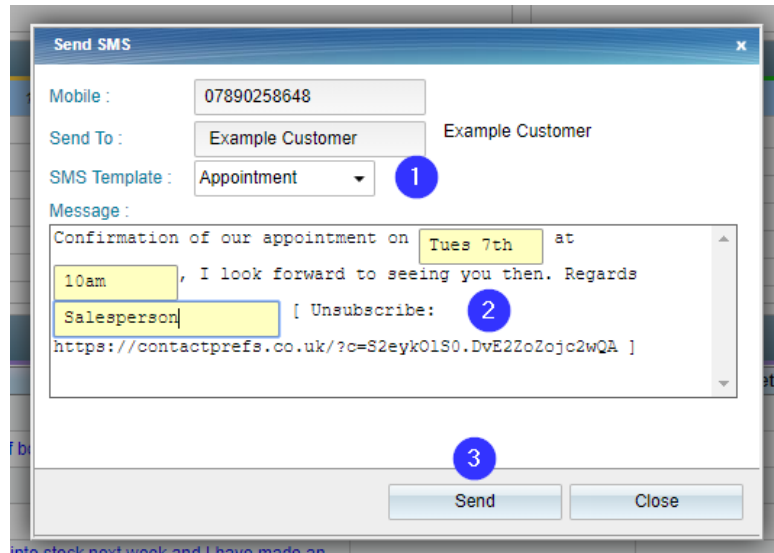


To add new templates please contact the helpdesk. Templates provided by manufacturers via their individual marketing portals can be loaded onto Mentor.

Send SMS

The Send SMS option allows users to select a pre-loaded SMS template to a customer. New templates can be added and SMS templates can have free text spaces to personalise the SMS template to the customer.

- Select the SMS template from the dropdown list (1)
- Enter in any details in the free text boxes (in yellow) (2)
- Send the SMS (3)

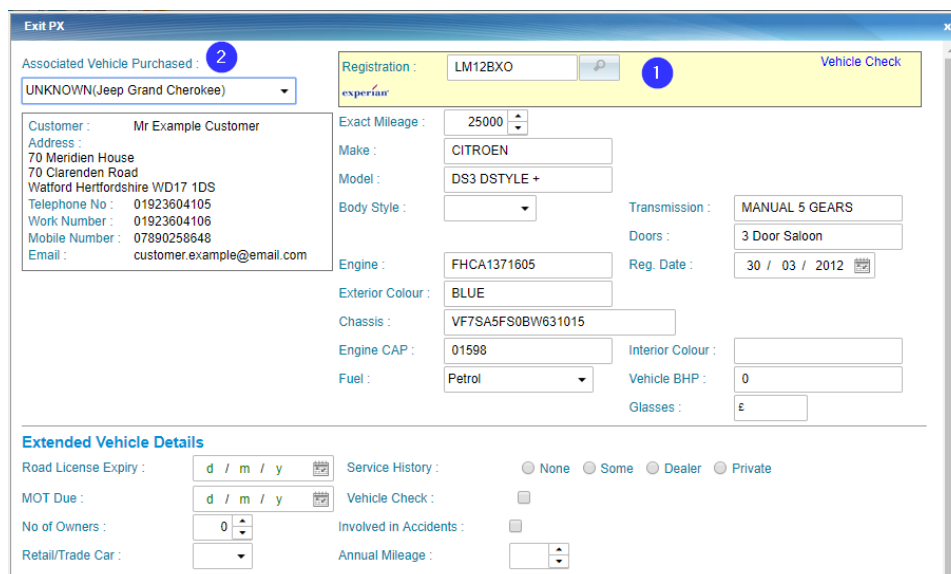


Loading a Part Exchange Vehicle



Select the Add PX Vehicle in the top right of the Part Exchange vehicle box from the customer card view screen.

- Enter in the registration of the PX vehicle. The vehicle details will be populated from Experian (1)
- Multiple PX vehicles can be associated to a deal (2)



Save and print the PX form and complete the assessment of the PX vehicle.

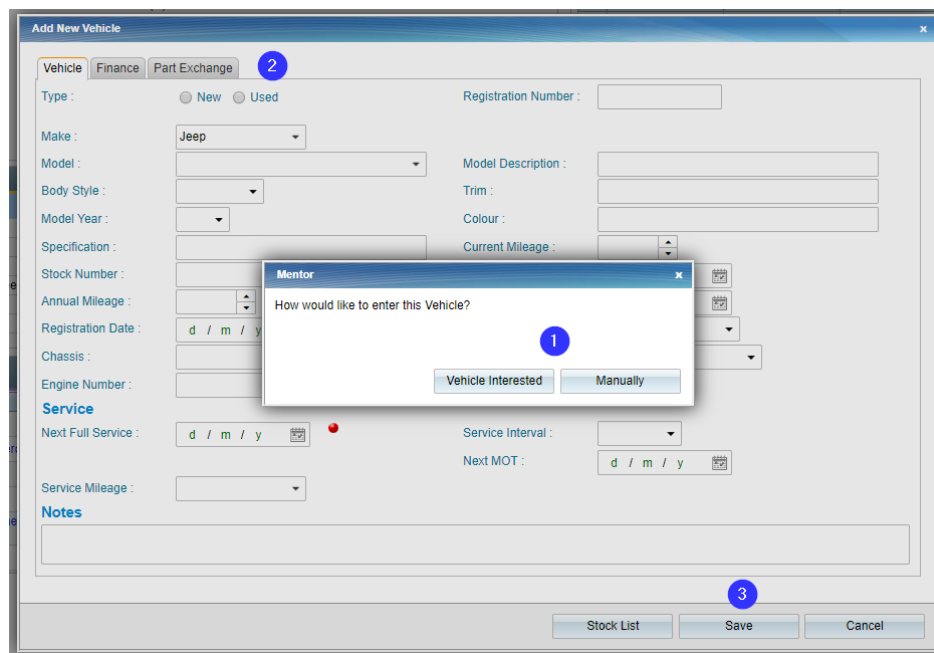
Loading a Vehicle Purchased

In order to complete a vehicle order form the vehicle under negotiation to purchase must be entered.



Select the Add Vehicle Purchased in the top right of the Vehicle Purchased box from the customer card view screen.

- A. Select either to enter the vehicle details from the vehicle interested or enter in the vehicle details manually (1)
- B. Additional vehicle finance details can be added and PX vehicles associated with the deal can be added or removed (2)
- C. Save the vehicle purchased record (3)



The vehicle will display in the customer card view with a vehicle status of **Negotiation**. This status will be updated to **Sold** with the sales user details once the deal activity has been recorded.

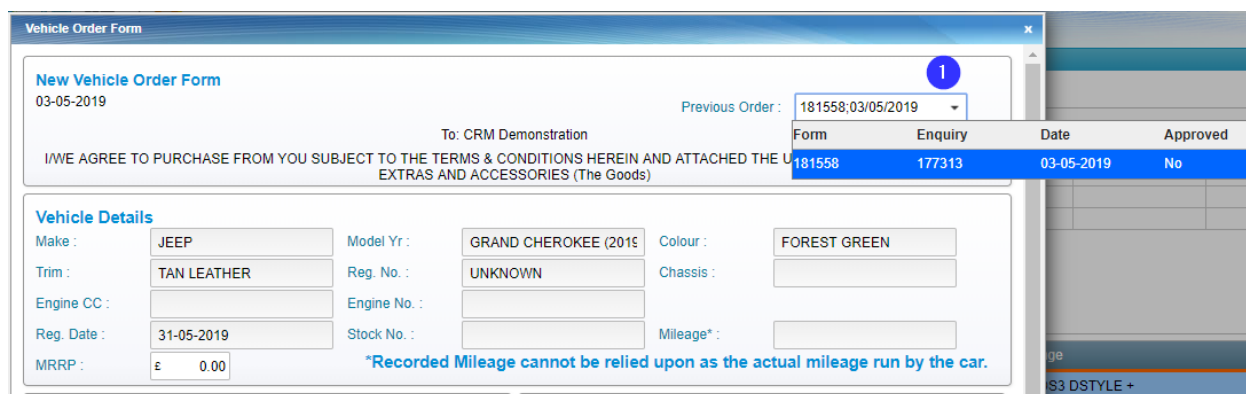
Vehicle Order Form



Select the Order from Icon from the Action bar. Select the correct option from the dropdown menu depending on New/Used vehicle, Fleet or Quote options.

The Customer and vehicle under negotiation will be displayed in the order form screen. Order forms can be updated and saved at any time. Each save creates a new version that can be recalled and subsequently approved by the manager.

- A. Each revision and save of the order form is recorded. The management approved copy is available for printing (1)
- B. Orders can be printed or emailed to customers



Vehicle Order Form

New Vehicle Order Form
03-05-2019

Previous Order : 181558;03/05/2019

To: CRM Demonstration

I/WE AGREE TO PURCHASE FROM YOU SUBJECT TO THE TERMS & CONDITIONS HEREIN AND ATTACHED THE U
EXTRAS AND ACCESSORIES (The Goods)

Form	Enquiry	Date	Approved
181558	177313	03-05-2019	No

Vehicle Details

Make : JEEP Model Yr : GRAND CHEROKEE (2015 Colour : FOREST GREEN

Trim : TAN LEATHER Reg. No. : UNKNOWN Chassis :

Engine CC : Engine No. :

Reg. Date : 31-05-2019 Stock No. : Mileage* :

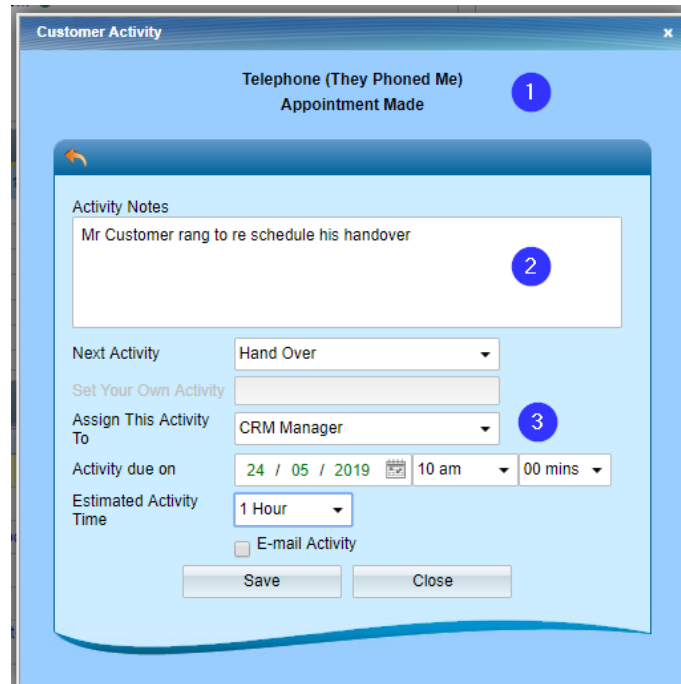
MRRP : £ 0.00

**Recorded Mileage cannot be relied upon as the actual mileage run by the car.*

Following up Actions

Every Action must have a follow up action. This follow on action is what will appear in the activity diary and is what will trigger the next action to be completed.

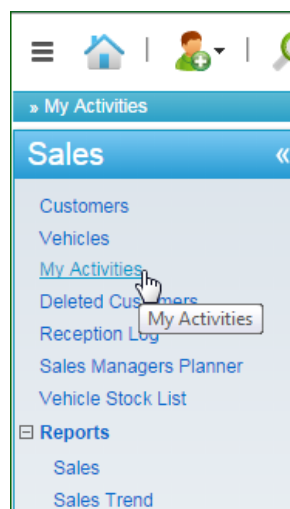
- A. The method of communication and the outcome is displayed at the top of the activity screen (1)
- B. Enter in the activity details (2)
- C. Select the next activity to complete and enter in the date and time (3)

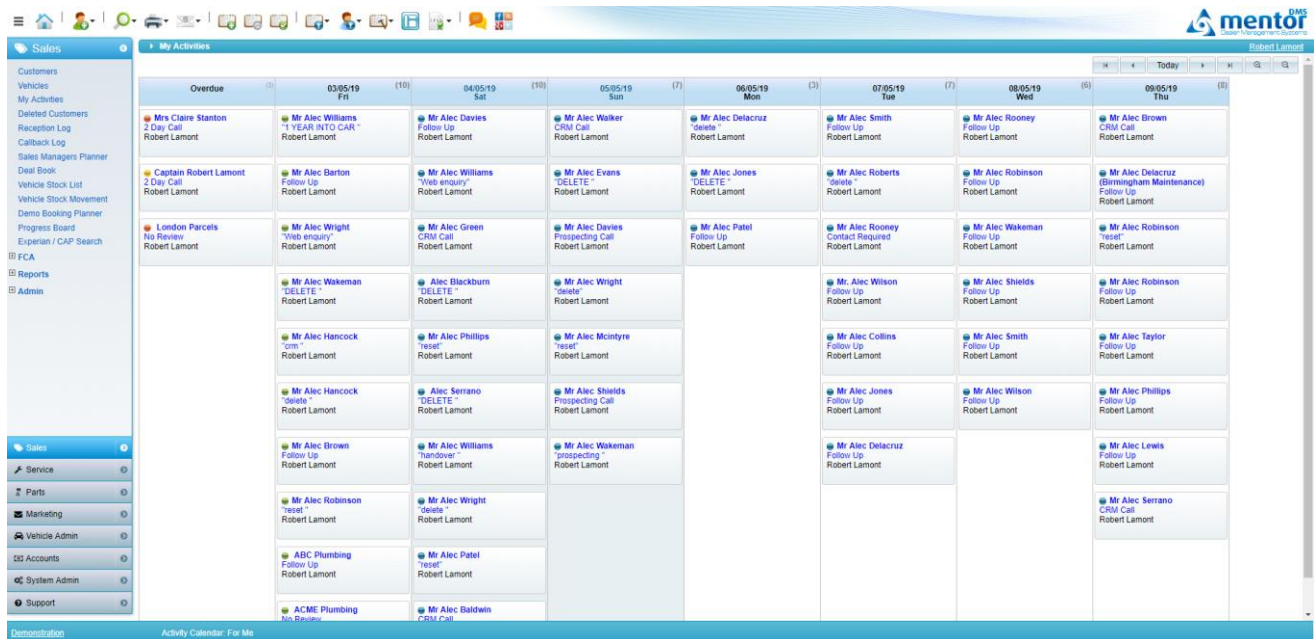


My Activities (Diary View)

All follow-on activities will be set to appear in the user's diary.

- A. Select My Activities from the side navigation Menu.





Overdue	03/05/19 Fri	04/05/19 Sat	05/05/19 Sun	06/05/19 Mon	07/05/19 Tue	08/05/19 Wed	09/05/19 Thu
Mrs Claire Stanton 2 Day Call Robert Lamont	Mr Alec Williams "1 YEAR INTO CAR" Robert Lamont	Mr Alec Davies Follow Up Robert Lamont	Mr Alec Walker CRM Call Robert Lamont	Mr Alec Delacruz "delete" Robert Lamont	Mr Alec Smith Follow Up Robert Lamont	Mr Alec Rooney Follow Up Robert Lamont	Mr Alec Brown CRM Call Robert Lamont
Captain Robert Lamont 2 Day Call Robert Lamont	Mr Alec Barton Follow Up Robert Lamont	Mr Alec Williams "Web enquiry" Robert Lamont	Mr Alec Evans "DELETE" Robert Lamont	Mr Alec Jones "DELETE" Robert Lamont	Mr Alec Roberts "Sales" Robert Lamont	Mr Alec Robinson Follow Up Robert Lamont	Mr Alec Delacruz (Birmingham Maintenance) Follow Up Robert Lamont
London Parcels No Review Robert Lamont	Mr Alec Wright "Web enquiry" Robert Lamont	Mr Alec Green CRM Call Robert Lamont	Mr Alec Davies Prospecting Call Robert Lamont	Mr Alec Patel Follow Up Robert Lamont	Mr Alec Rooney Contact Required Robert Lamont	Mr Alec Wakeman Follow Up Robert Lamont	Mr Alec Robinson "reset" Robert Lamont
	Mr Alec Wakeman "DELETE" Robert Lamont	Alec Blackburn "DELETE" Robert Lamont	Mr Alec Wright "dealer" Robert Lamont		Mr Alec Wilson Follow Up Robert Lamont	Mr Alec Shields Follow Up Robert Lamont	Mr Alec Robinson Follow Up Robert Lamont
	Mr Alec Hancock "crm" Robert Lamont	Mr Alec Phillips "reset" Robert Lamont	Mr Alec McIntyre "reset" Robert Lamont		Mr Alec Collins Follow Up Robert Lamont	Mr Alec Smith Follow Up Robert Lamont	Mr Alec Taylor Follow Up Robert Lamont
	Mr Alec Hancock "DELETE" Robert Lamont	Alec Serrano "DELETE" Robert Lamont	Mr Alec Shields Prospecting Call Robert Lamont		Mr Alec Jones Follow Up Robert Lamont	Mr Alec Wilson Follow Up Robert Lamont	Mr Alec Phillips Follow Up Robert Lamont
	Mr Alec Brown Follow Up Robert Lamont	Mr Alec Williams "handover" Robert Lamont	Mr Alec Wakeman "prospecting" Robert Lamont		Mr Alec Delacruz Follow Up Robert Lamont		Mr Alec Lewis Follow Up Robert Lamont
	Mr Alec Robinson "reset" Robert Lamont	Mr Alec Wright "delete" Robert Lamont					Mr Alec Serrano CRM Call Robert Lamont
	ABC Plumbing Follow Up Robert Lamont	Mr Alec Patel "reset" Robert Lamont					
	ACME Plumbing No Review Robert Lamont	Mr Alec Baldwin CRM Call Robert Lamont					

Activity Actions



Add Scheduled Activity (for internal use- this will not show next to a customer)



Reassign Activity to another user



Complete activity (role dependant permission- usually Managers only)



Filter Activities by due status or activity type



Managers Activity Tools



Filter Activities by user



Toggle between List or Calendar view screens


- B. To navigate to the customer card view select the customer name (1)
- C. To follow up and complete the daily activity tasks select the activity name (2)



Customer Pop Screen

- A. Edit, Delete, Send Letter/Email, SMS or add Actions (1)
- B. Customer information (2)
- C. Activity to be followed up (3)
- D. Select to go to the full customer card view (4)


1







Customer : Mr Alec Williams
Address : 71 High Lane
 Brighton
Home Tel : 01301 345511
Customer Type : Retail
Notes :

Postcode : BS48 8QV
Mobile : 07514 406819
Email : help@mentorsystems.co.uk
Branch : Demonstration

Reference No. : 246095

2

Activity Log | Planner History | Service | Vehicles

	Summary	Next Review	Set For	Due On	Set By	Date Set
	3 Vestibulum eu odio vitae mauris condimentum elementum et. Morbi imperdiet ipsum sed euismod Vestibulum eu odio vitae mauris condimentum elementum et.	"Web enquiry"	Robert Lamont	04/05/19	Greg Shields	01/10/16 8:30 AM
	Cras ut risus lobortis Vestibulum eu odio vitae mauris condimentum elementum et.	No Review	Greg Shields	21/06/17	Greg Shields	21/06/17 10:22 AM
	Vestibulum eu odio vitae mauris condimentum elementum et. Lorem ipsum dolor sit amet, consectetur adipiscing elit. In at Lorem ipsum dolor sit amet, consectetur adipiscing elit. In at	No Review	Greg Shields	25/03/17	Greg Shields	25/03/17 9:20 AM
	Proin at lobortis Proin at	No Review	Greg Shields	21/02/17	Greg Shields	21/02/17 9:21 AM
	lobortis Proin a tVestibulum eu odio vitae mauris condimentum elementum et.	No Review	Greg Shields	20/10/16	Greg Shields	20/10/16 2:23 PM

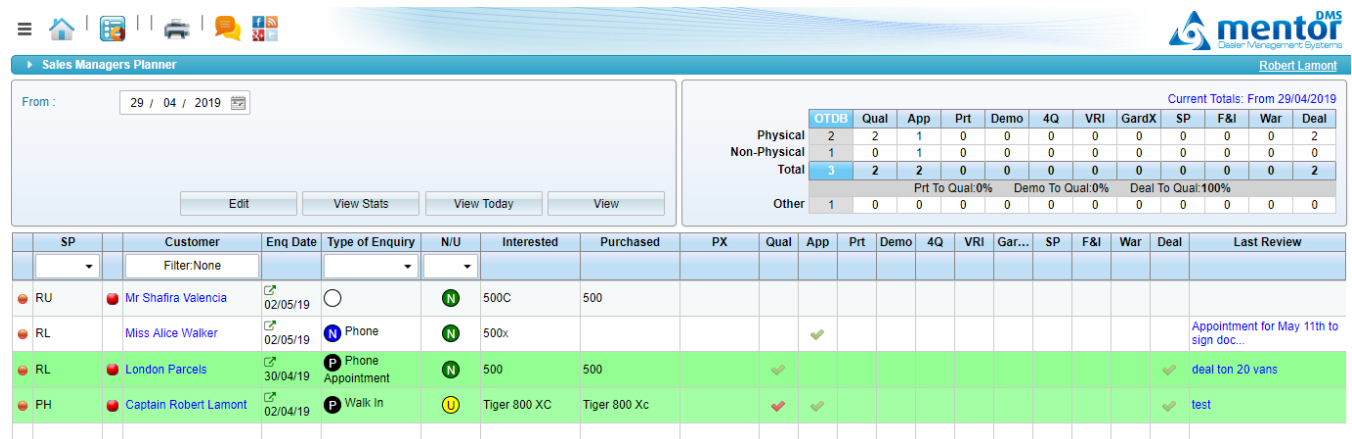
4
Go To Card
Close

Follow the activity process to complete this activity and record the outcome and then set the next activity to appear in the diary.

Sales Managers Planner

The Sales Managers Planer is the overview of the dealerships performance for any given period. Daily activities by the sales staff trigger actions on the planner so the sales manager is informed of new enquiries and the progression of ongoing enquiries.

The Planner can be used by managers to review activities by sales staff as well as the record the sales of additional products or warranties so that a history of dealership KPI's are met.



Sales Managers Planner

From: 29 / 04 / 2019

Current Totals: From 29/04/2019

	OTDB	Qual	App	Prt	Demo	4Q	VRI	GardX	SP	F&I	War	Deal
Physical	2	2	1	0	0	0	0	0	0	0	0	2
Non-Physical	1	0	1	0	0	0	0	0	0	0	0	0
Total	3	2	2	0	0	0	0	0	0	0	0	2
Other	1	0	0	0	0	0	0	0	0	0	0	0

Prt To Qual: 0% Demo To Qual: 0% Deal To Qual: 100%

SP	Customer	Enq Date	Type of Enquiry	N/U	Interested	Purchased	PX	Qual	App	Prt	Demo	4Q	VRI	Gar...	SP	F&I	War	Deal	Last Review
RU	Mr Shafira Valencia	02/05/19	Phone	N	500C	500													
RL	Miss Alice Walker	02/05/19	Phone	N	500x				✓										Appointment for May 11th to sign doc...
RL	London Parcels	30/04/19	Phone Appointment	N	500	500		✓										✓	deal ton 20 vans
PH	Captain Robert Lamont	02/04/19	Walk In	U	Tiger 800 XC	Tiger 800 Xc		✓	✓									✓	test

Planner Icons

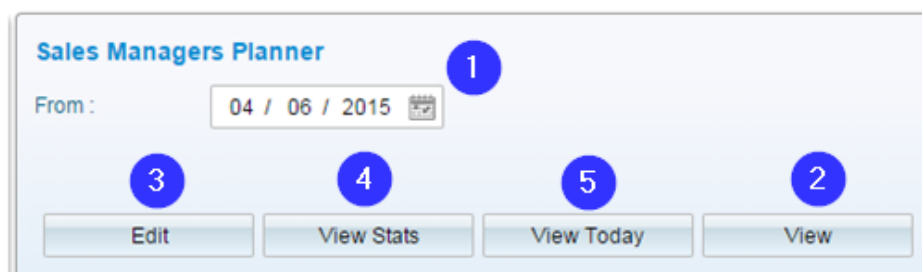


Toggle Planner Mode (Report Mode)

Planner search

The planner will load by default with today's information unless a selection has been made using the search options which will be saved each time you load the planner until cleared.

- Select date to view planner from (1)
- Select view to see the planner data selected (2)
- Enter planner edit mode to change data within the planner (3)
- View a pop up on planner stats (4)
- View todays planner activity only (5)



Sales Managers Planner

From: 04 / 06 / 2015

1

2

3

4

5

Edit View Stats View Today View

Planner Alerts



Slow Response – The customer was not followed up within 48 hours of the enquiry date



Duplicate Customer – There is a potential match on the database (click to see matches)



Repeat Customer



Motability

Planner Rows

The Sales Managers Planner has 20 headers with 5 headers being customisable to each individual branch for measuring KPI's.

SP	Customer	Enq Date	Type of Enquiry	N/U	Interested	Purchased	PX	Qual	App	Prt	Demo	4Q	VRI	Gar...	SP	F&I	War	Deal	Last Review
RU	Mr Shafira Valencia	02/05/19	Prospect Appointment	N	500C	500		✓	✓		✓								Appointment made to demo

SP – Salesperson (the salesperson who generated and will be credited with the enquiry- editable)

Customer – Click through to the customer card view

Enq Date – Date the customer first appeared on the planner

Type of enquiry – How the enquiry was generated

N/U – New/Used Vehicle

Interested – Vehicle the customer is interested in

Purchased – Vehicle sold to the customer

PX – Part exchange vehicle (if any)

Qual – The lead is Qualified

Appt – An appointment has taken place

4Q – A proposal has been generated

Custom Labels 1 to 5 – These labels can be set per branch to record individual KPS's

Last Review – The last recorded customer interaction

The Planner will update with further information as the sales staff progress through their sales actions towards a deal.

Therefore the planner is the managers' guide as to what has happened today what needs to happen to secure a deal.

Planner Tools

The planner has a range of options to view additional data relating to the customer or enquiry.

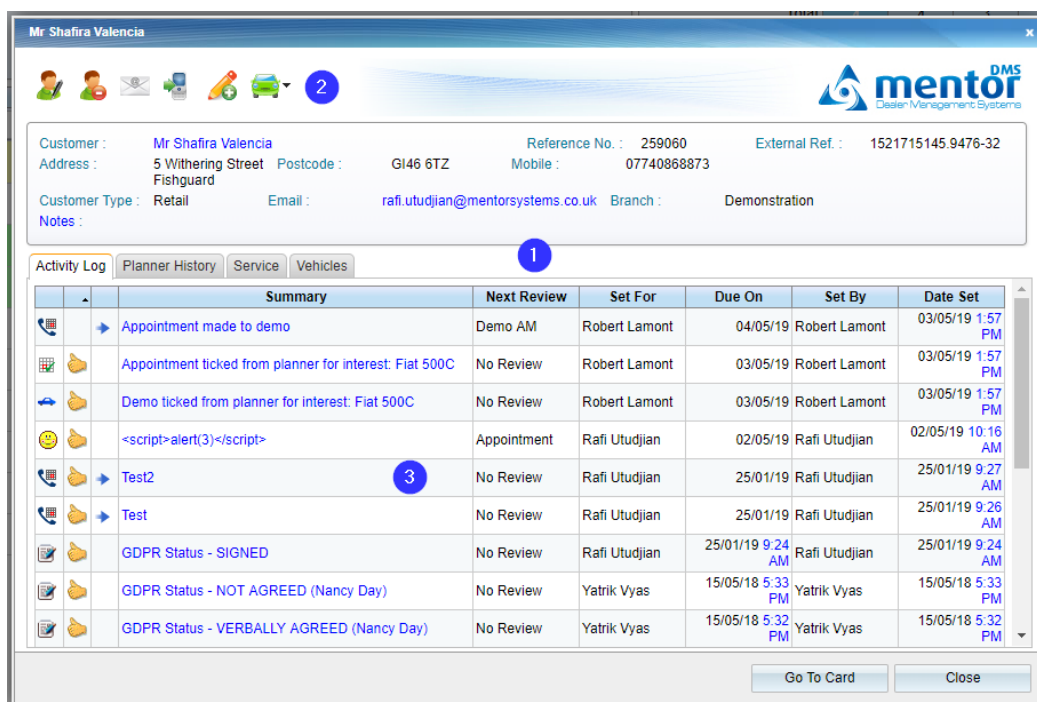
- A. Select the customer name (1)

SP	Customer	Enq Date	Type of Enquiry	N/U	Interested	Purchased
	Filter:None					
RU	Mr Shafira Valencia	02/05/19	P Prospect Appointment	N	500C	500

- B. The customer pop screen appears (1)

- C. Edit customer, delete customer, send Letter/Email/SMS, add action, view order forms (2)

- D. Review activity log (3)



Mr Shafira Valencia

Customer : Mr Shafira Valencia Reference No. : 259060 External Ref. : 1521715145.9476-32
 Address : 5 Withering Street Postcode : G146 6TZ Mobile : 07740868873
 Customer Type : Retail Email : rafi.utudjian@mentorsystems.co.uk Branch : Demonstration
 Notes :

Activity Log Planner History Service Vehicles

	Summary	Next Review	Set For	Due On	Set By	Date Set
	Appointment made to demo	Demo AM	Robert Lamont	04/05/19	Robert Lamont	03/05/19 1:57 PM
	Appointment ticked from planner for interest: Fiat 500C	No Review	Robert Lamont	03/05/19	Robert Lamont	03/05/19 1:57 PM
	Demo ticked from planner for interest: Fiat 500C	No Review	Robert Lamont	03/05/19	Robert Lamont	03/05/19 1:57 PM
	<script>alert(3)</script>	Appointment	Rafi Utudjian	02/05/19	Rafi Utudjian	02/05/19 10:16 AM
	Test2	No Review	Rafi Utudjian	25/01/19	Rafi Utudjian	25/01/19 9:27 AM
	Test	No Review	Rafi Utudjian	25/01/19	Rafi Utudjian	25/01/19 9:26 AM
	GDPR Status - SIGNED	No Review	Rafi Utudjian	25/01/19 9:24 AM	Rafi Utudjian	25/01/19 9:24 AM
	GDPR Status - NOT AGREED (Nancy Day)	No Review	Yatrik Vyas	15/05/18 5:33 PM	Yatrik Vyas	15/05/18 5:33 PM
	GDPR Status - VERBALLY AGREED (Nancy Day)	No Review	Yatrik Vyas	15/05/18 5:32 PM	Yatrik Vyas	15/05/18 5:32 PM

Go To Card Close

- E. Select the enquiry date (1)

SP	Customer	Enq Date	Type of Enquiry	N/U	Interested	Purchased
	Filter:None					
RU	Mr Shafira Valencia	02/05/19	P Prospect Appointment	N	500C	500

- G. Customer Information (1)
- H. Vehicle in negotiation/sold (2)
- I. Planner history- all actions that caused planner changes, Shown on planner reasons- why the customer is on the planner, Enquiry activities- activities triggering planner changes. (3)

[illegible]

Mentor has a full report suite containing detailed reports for daily, weekly, monthly or yearly statistics. The Planner data is heavily relied upon for these reports so correct Planner management is crucial to recording the correct statistics.

DOCUMENT CONTROL

AUTHOR

Name	Position	Contact Number
Robert Lamont	Commercial Manager	01923 604105

REVISION HISTORY

Version	Author	Date	Revision Detail
V 1.0	Robert Lamont	02-05-2019	Initial Document.

REVIEWED BY

Version	Issue date	Name	Position	Review Date
V 1.0	02-05-2019	Paul Heams	Software Development Manager	05-02-2019

APPROVALS

Approval refers to the approver's acceptance of the content and overall intention of this document, including acceptance of any commitments described in order to successfully deliver the initiative. The approver, where relevant, also confirms that this document complies with relevant strategies, policies and regulatory requirements.

Version	Issue date	Name	Position	Approval Date
V 1.0	02-05-2019	Paul Heams	Software Development Manager	02-05-2019

RELATED DOCUMENTS

Document	Location