



# VEHICLES - SNAPSHOT

# Update Context

- 1.View.
- 2.Gross Profits / Units.
- 3.Info Widget.
- 4.YTD.
- 5.Expenses.
- 6.Average Units vs Actual Units.
- 7.Other Info

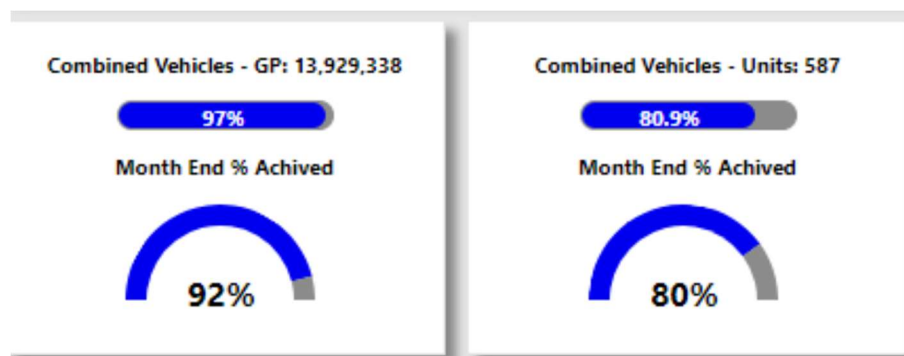
# 1. View.

The view consists off all vehicle departments depending on the user set up. If User is set up to a New or Used Department, it will only display that department info. If user set up as New & Used Manager, they can have combined and single view per department.



# 2. Gross Profit.

The system will calculate the gross profits month to date by the account type from the DMS system. There is 2 ways the system calculates this gross profit. It can include or exclude the Miscellanies Income accounts depending on group decision.



The progress bar will compare the actual to a month to date budget, the month to date budget is calculated by the full month budget and then it then calculates the working days for the budget. This will be the target month to date target.

The halfmoon compares the Month to date actual to the progress towards full month budget.

### 3. Info Widget.

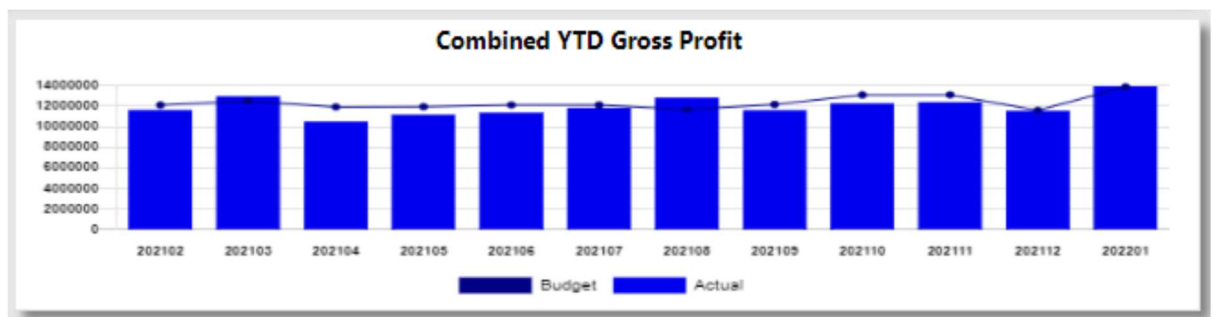
Depending on selection as above.



- Vehicle GP Contribution → This display a calculation of what the department is contributing towards the total Gross profit for all departments.
- Retail & Fleet Units → This calculates the Retail & Fleet Units Sold.
- Other Sales → This calculates the Other Sales of Units.
- Average Units 3 Months (R&F) → Calculates the Average Units sold for the last 3 months (Retail & Fleet).
- Previous Month → Display Units sold previous Month.
- Average Expenses 3 Months → Calculates the department average expenses for the last 3 months.

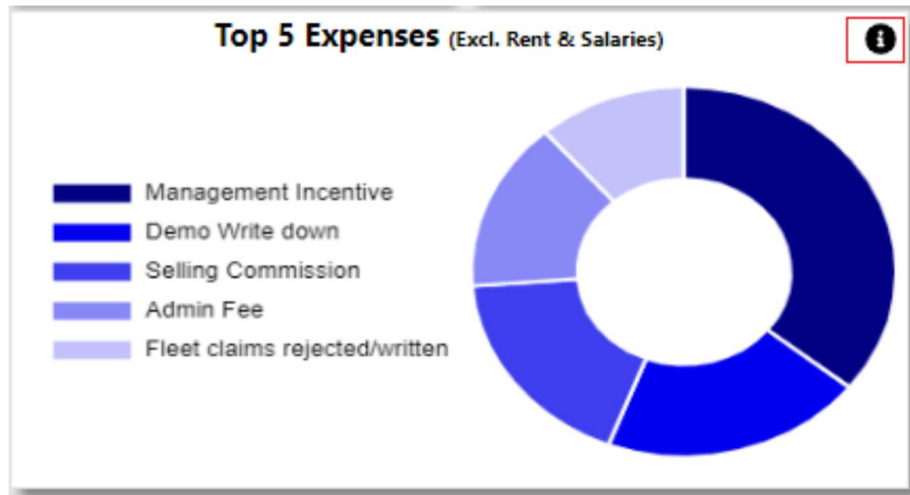
### 4.12 Month Gross Profit vs Budget.

This will display a 12-month progress against the budget.

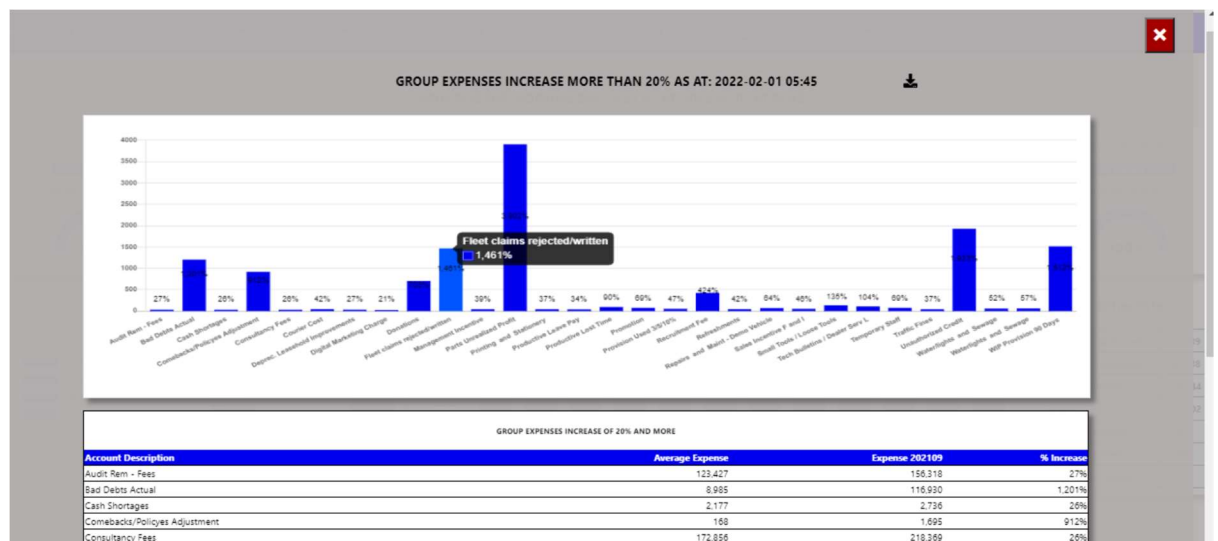


## 5. Top 5 Expenses.

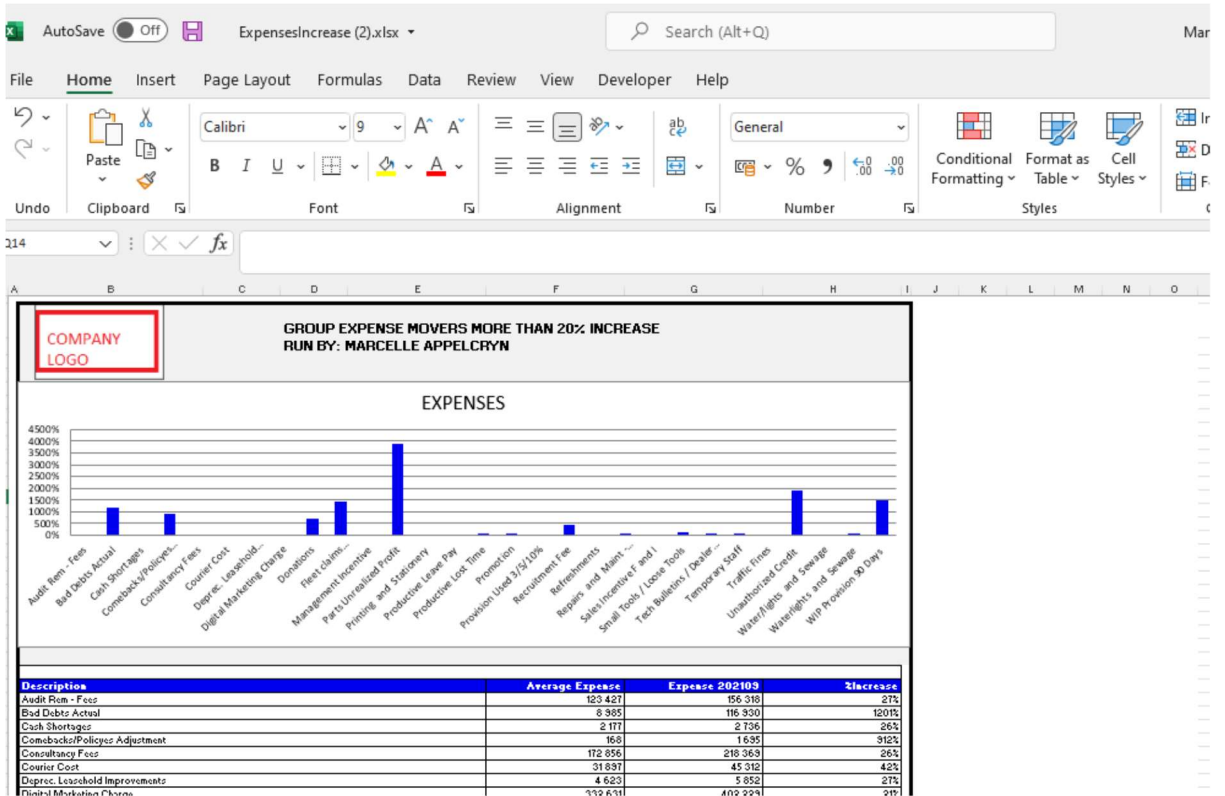
The top 5 expenses that is processed in the month that was selected will display in this graph excluding the rent and salaries expenses.



With the information icon you can then drill down to the expenses for the selected month where there was an increase more than 20%.

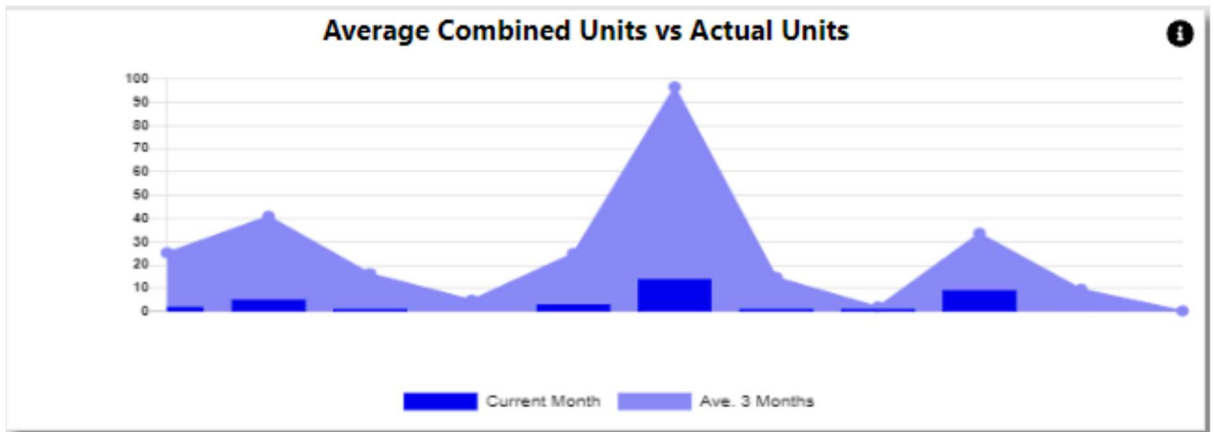


You can export the above view to excel including the graph and individual expense line that has increased more than 20%.

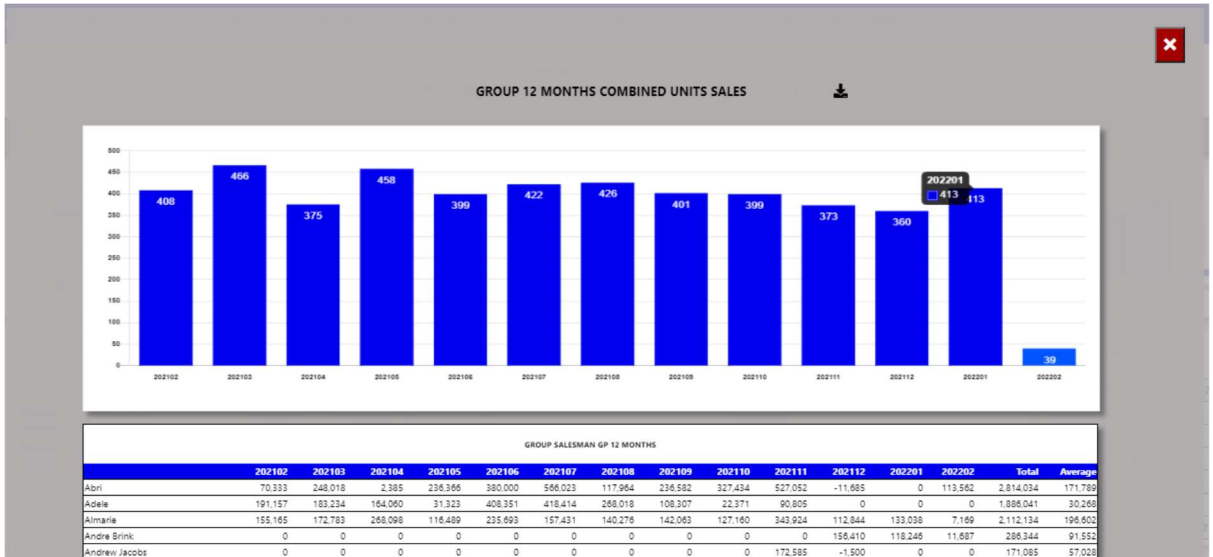


## 6. Average Units vs Actual Units.

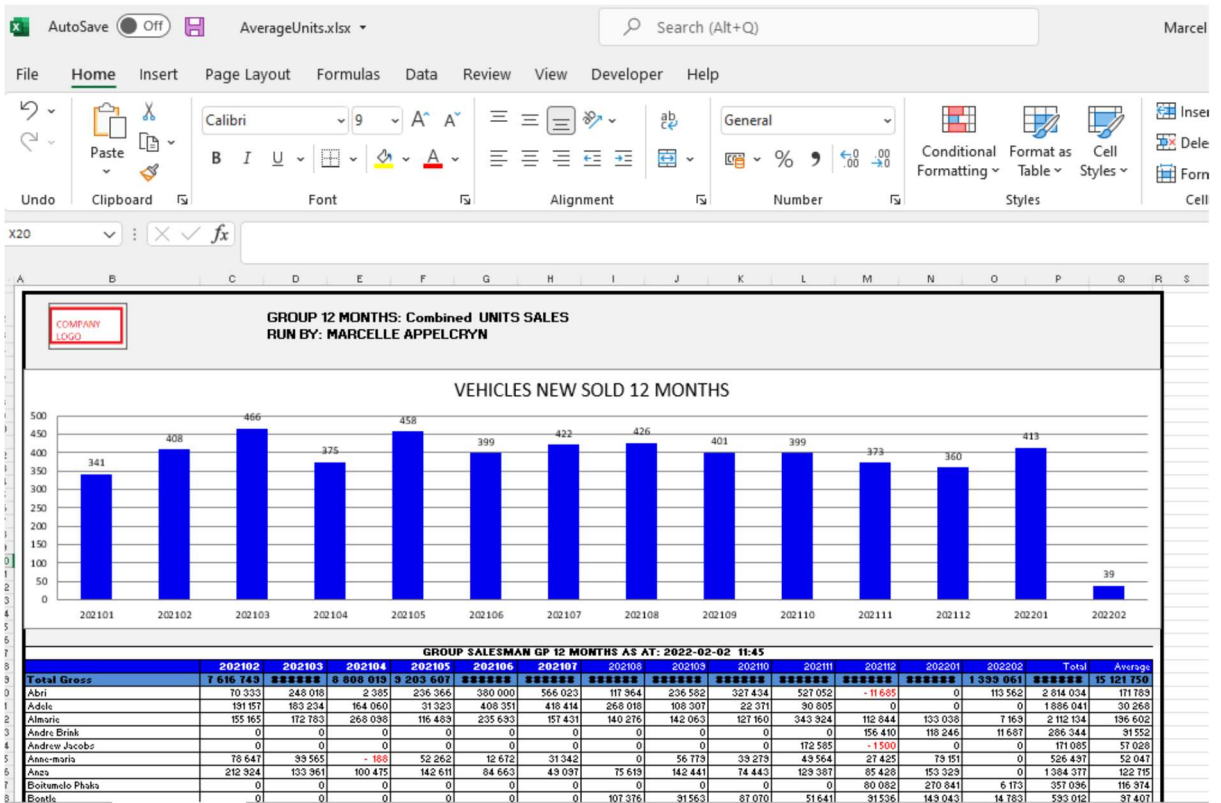
This compares Branch / Salesman Average units for the last 3 months to the actual units for selected month.



With the information Icon you can then drill down to Unit / Gross Profit per salesman for the last 12 months.



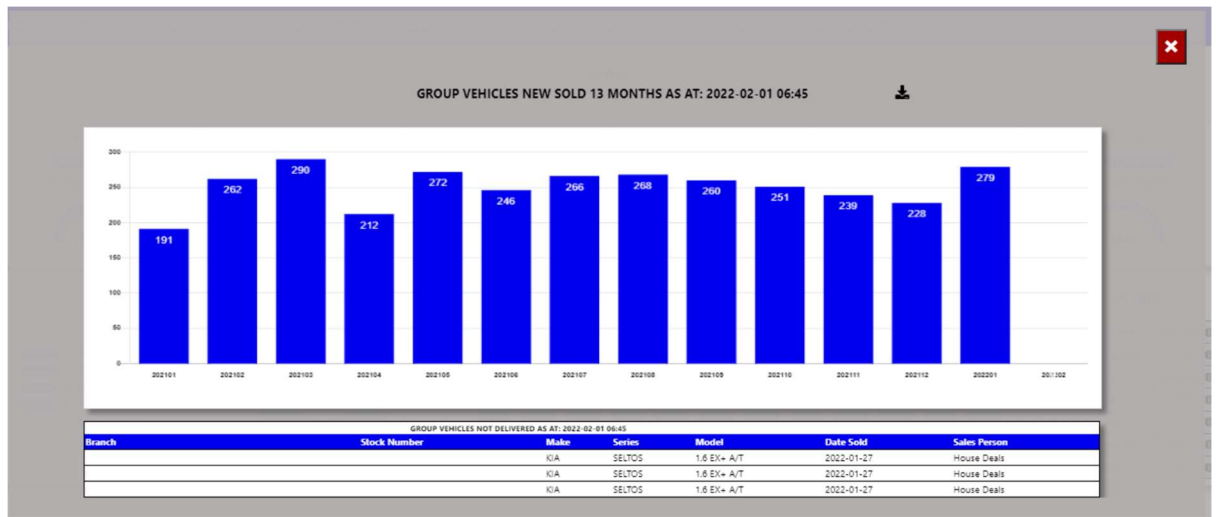
You can export the above view to excel including the graph and individual salesman details will export for the last 12 months.



## 7. Other Info.

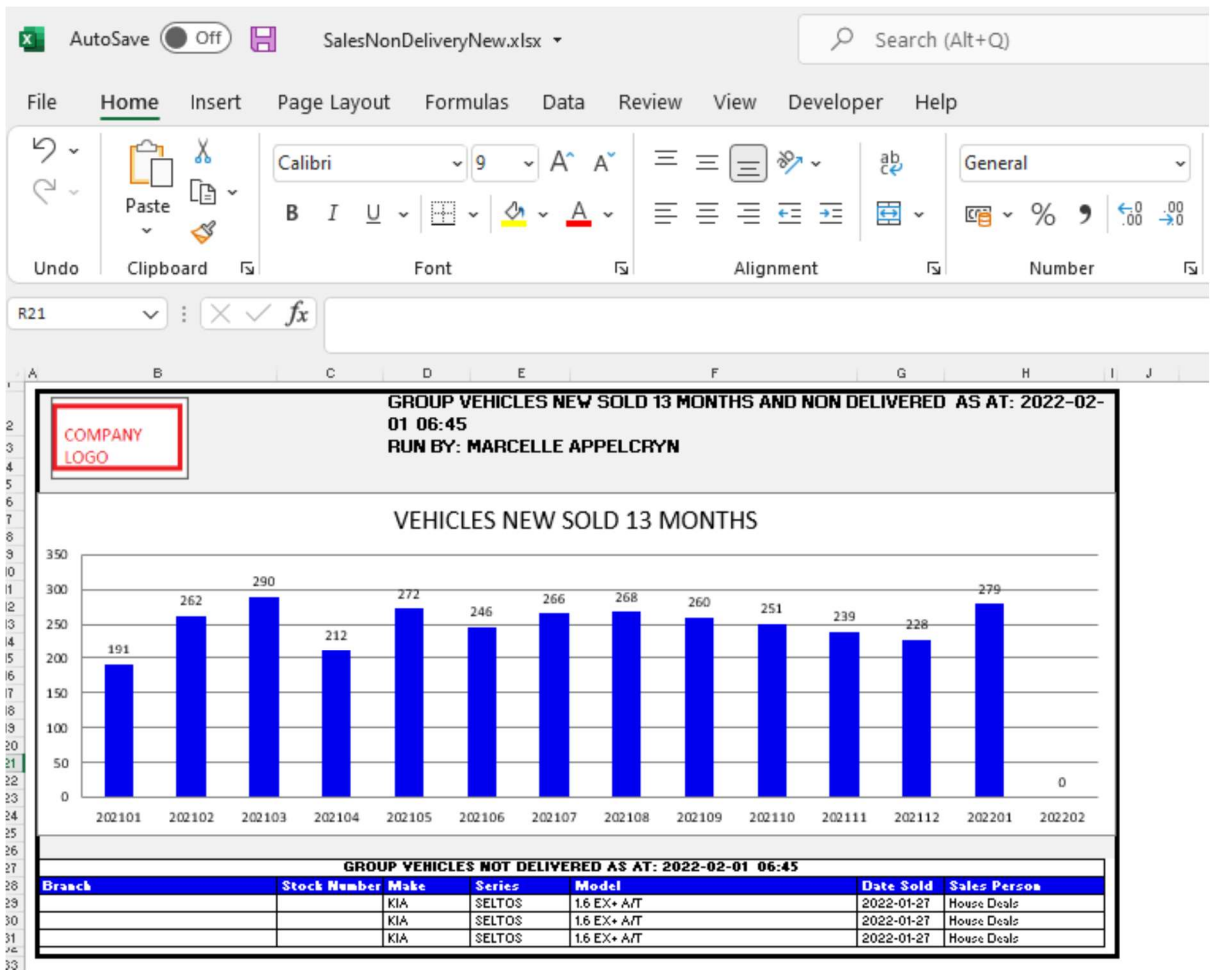
Other Info		
Sold vs Delivered	435 /716	📘
Invoiced (2022-02-02)	0	📘
F&I Awaiting Status	10	📘
F&I Approved Deals	277	📘
Open Vehicle Orders	440	📘
Open Progress Deals	17	📘
Active Internet Leads	1,802	📘

- a) New Sold vs Delivered – this calculates the number of units sold for the selected month and compares to what vehicles has been marked as delivered. The Info icon will then display a graph of the last 12 months units and a list of vehicles that has not yet been marked as delivered.

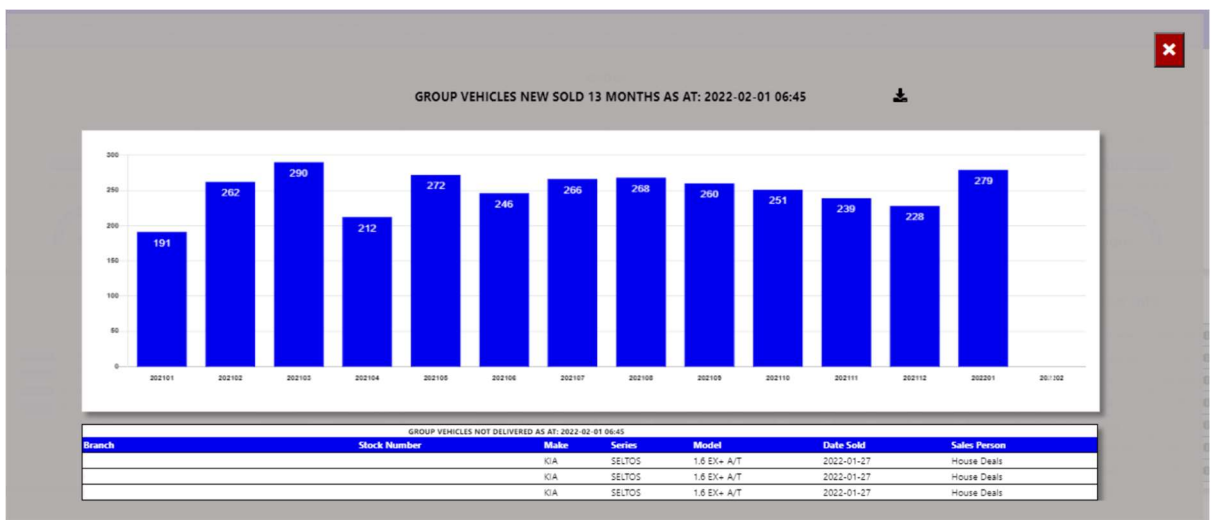


You can then export this to an excel document with graph and the line items.

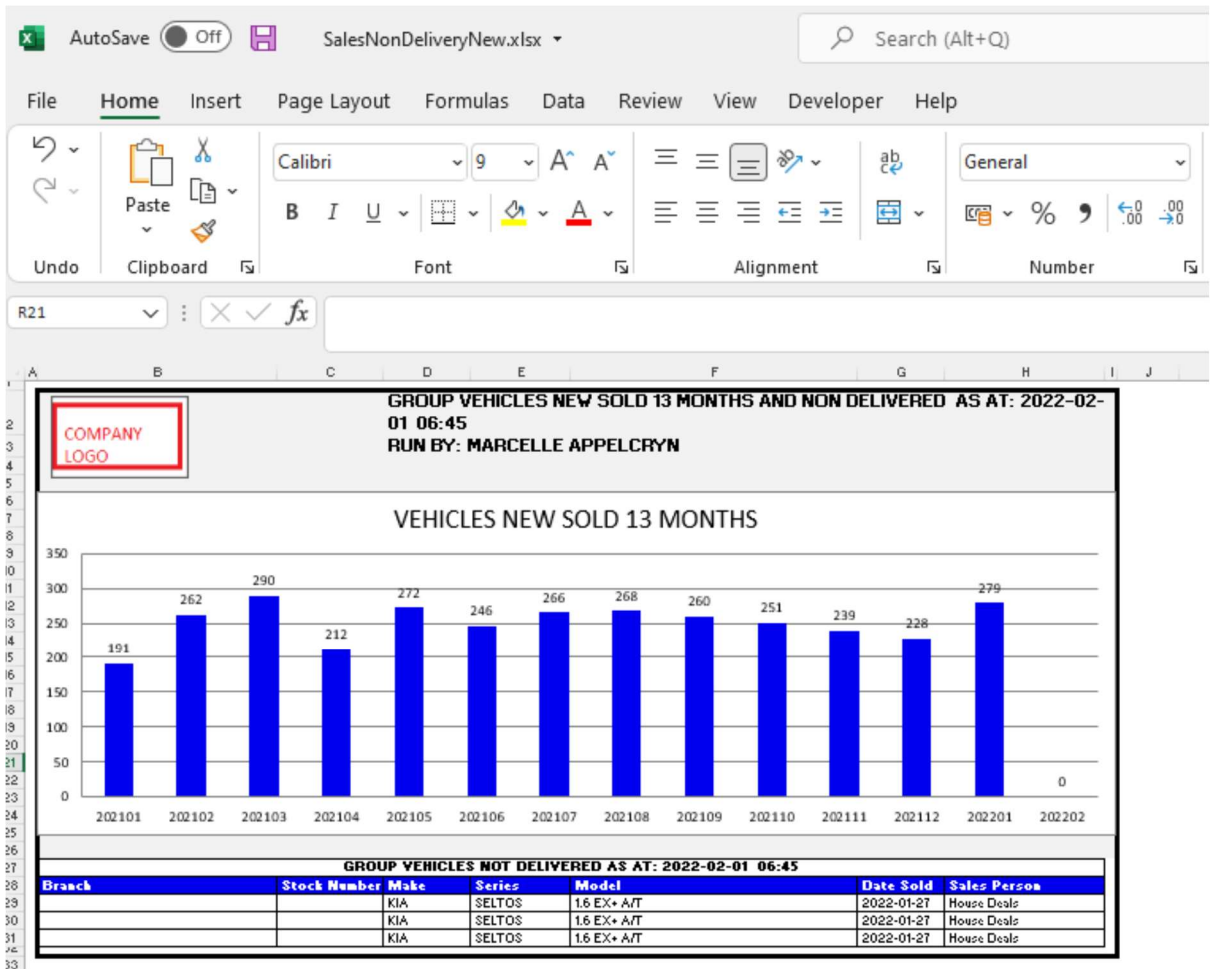




- b) Used Sold vs Delivered – this calculates the number of units sold for the selected month and compares to what vehicles has been marked as delivered. The Info icon will then display a graph of the last 12 months units and a list of vehicles that has not yet been marked as delivered.

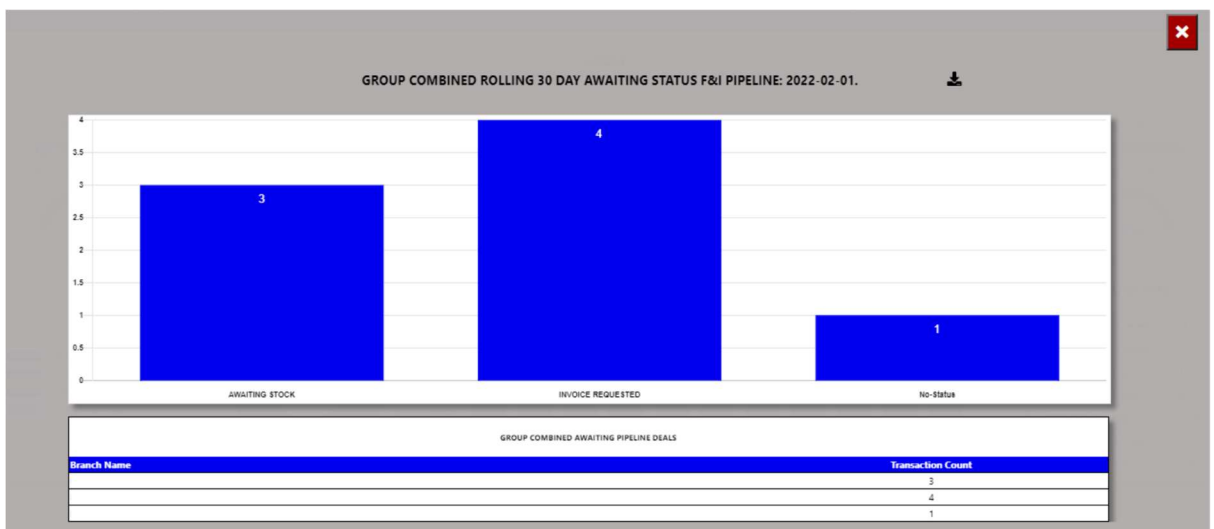


You can then export this to an excel document with graph and the line items.

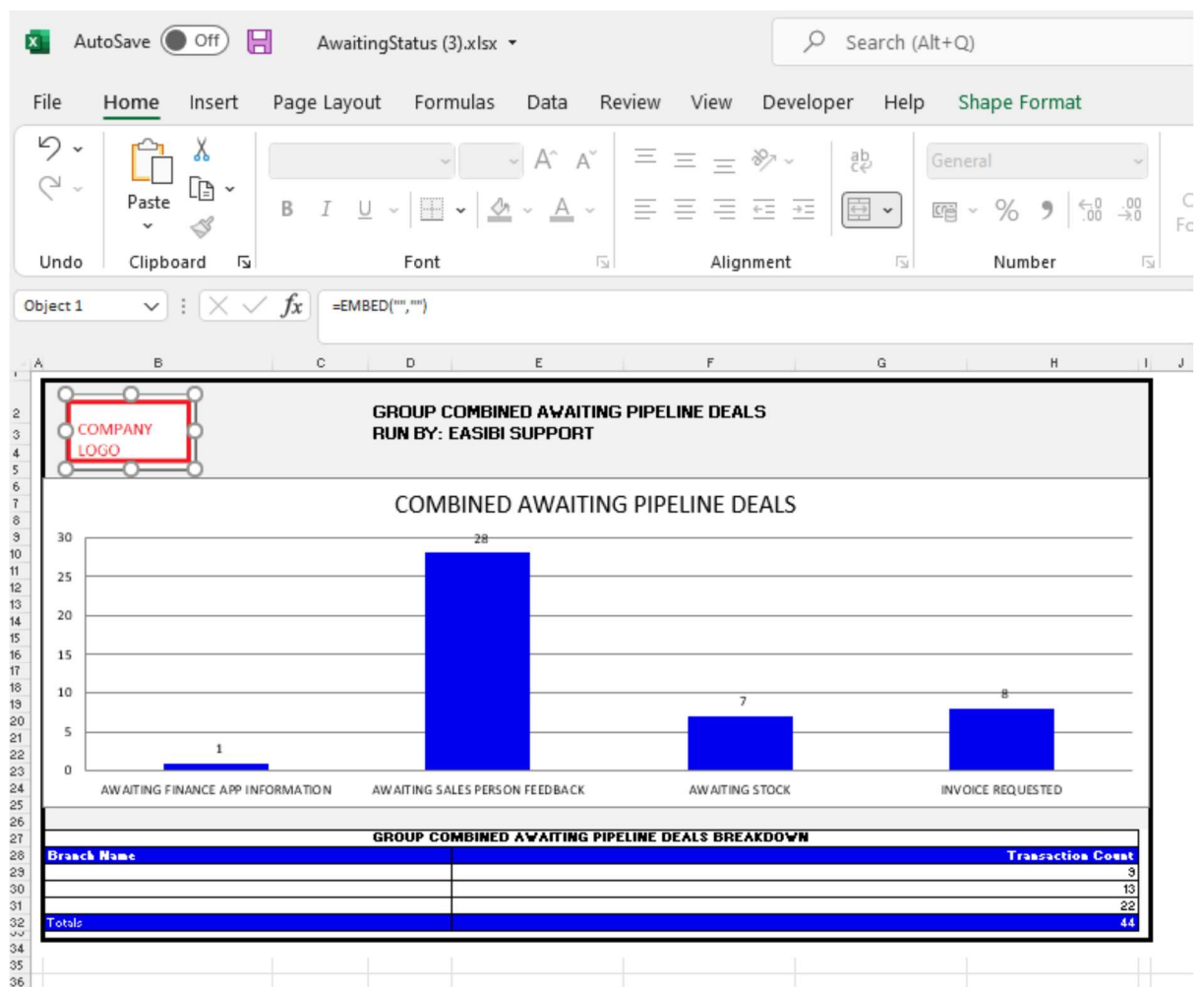


c) F&I Awaiting Status – this calculates from the Seriti F&I system all deals that is in an awaiting status.

The Info icon will then display a graph ageing of each branch and details regarding the Awaiting status of the deal.



You can then export this to an excel document with graph and the line items.



You can click a status, and it will drill down to the transaction and its details. With an option to query this Repair Order from the BI tool.

GROUP COMBINED - AWAITING SALES PERSON FEEDBACK FROM F&I ROLLING 30 DAYS

Date Created	Deal Age	Home Branch	Business Manager	Salesman	Customer	Vehicle	New/Used	Transaction Number	Finance Status	Finance Summary	Financial House	Pending Profit	Action
2022-01-03	29		PEET DOTGIETER	COENRAAD KLOPPER	MRS DAPHNEY SIBONGILE SMITH	HONDA BALLADE 1.5 EXECUTIVE	USED	ZALAZA0008478863	PENDING	AVAF: APPROVED (2022015980502860698) LAZF: APPROVED (85332590452) MFC: APPROVED MQF: DECLINED (2000625190) SBALFA: E AND O (0001066142)	Not Selected	9,807.48	Query
2022-01-04	28		ALPESH MAHETA	TENDAY NYABAWA	MRS MARISCA VAN STADEN	MAZDA MAZDA2 1.5 INDIVIDUAL SDP	USED	ZALAZA0008479942	PENDING	AVAF: APPROVED (2022015980502863711) LAZF: APPROVED (85332618806) MFC: APPROVED MFPN: DECLINED (85332800144) MQF: DECLINED (2000625593) SBALFA: E AND O (0001065890)	Not Selected	2,788.59	Query
2022-01-		LAZARUS	ALPESH		LINDIWE HOLDINGS	MAZDA MAZDA2 1.5				AVAF: DECLINED (2022015980115860956) LAZF: DECLINED	Not		

**Create Mail** ✕

Date Created:  
2022-01-03

Customer:  
MRS DAPHNEY SIBONGILE SMITH

Business Manager:  
PEET POTGIETER

Salesman:  
COENRAAD KLOPPER

Status:  
AWAITING SALES PERSON FEEDBACK

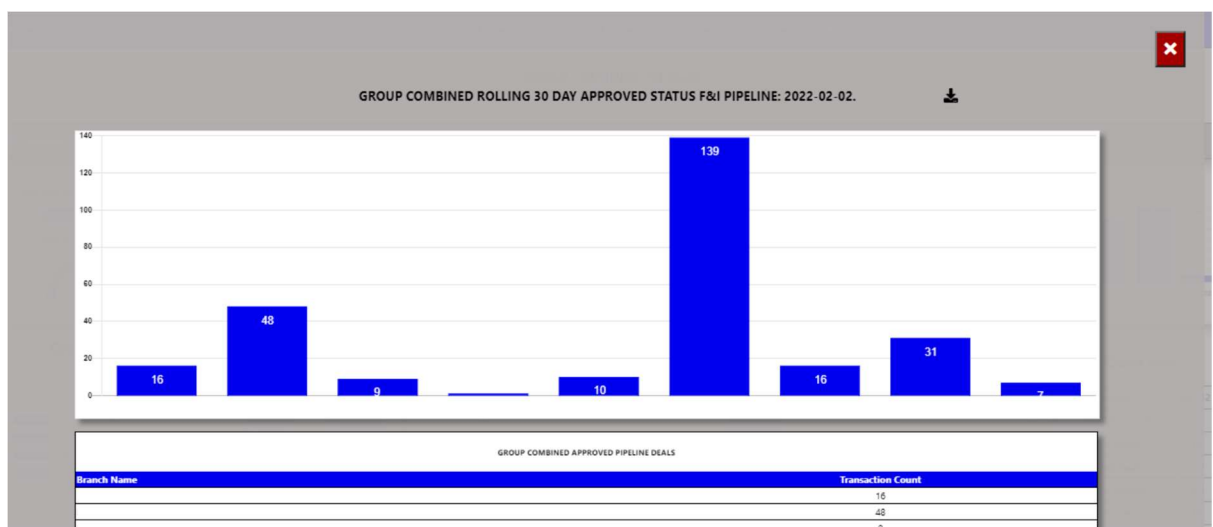
Complete By:  
2022/02/01 📅

Action:  
Please Type Action Required

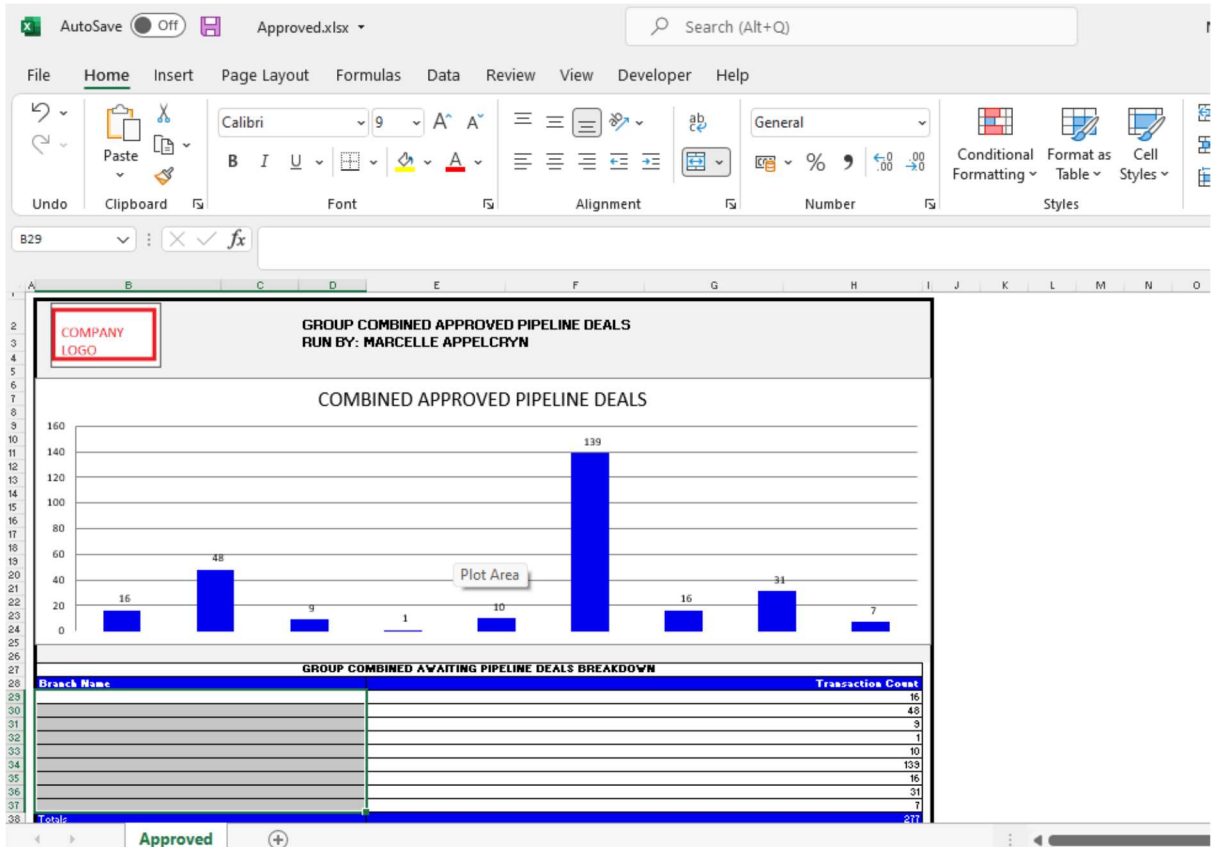
Assign To:  
EasiBI Support

d) F&I Approved Deals – this calculates the total deals in the F&I system where the status of the deal is approved.

The Info icon will then display a graph each branch / Business Manager and details regarding the Approved status of the deal.



You can then export this to an excel document with graph and the line items.



You can click a status, and it will drill down to the transaction and its details. With an option to query this Repair Order from the BI tool.

**GROUP COMBINED - AWAITING SALES PERSON FEEDBACK FROM F&I ROLLING 30 DAYS**

Date Created	Deal Age	Home Branch	Business Manager	Salesman	Customer	Vehicle	New/Used	Transaction Number	Finance Status	Finance Summary	Financial House	Pending Profit	Action
2022-01-03	29		PEET POTGIETER	COENRAAD KLOPPER	MRS DAPHNEY SIBONGILE SMITH	HONDA BALLADE 1.5 EXECUTIVE	USED	ZALAZA0008478869	PENDING	AVAP: APPROVED (2022015980502860698) LAZF: APPROVED (85332590452) MFC: APPROVED MQF: DECLINED (2000625190) SBALFA: E AND O (0001086142)	Not Selected	9,807.48	Query
2022-01-04	28		ALPESH MAHETA	TENDAY NYABAWA	MRS MARISCA VAN STADEN	MAZDA MAZDA2 1.5 INDIVIDUAL SDr	USED	ZALAZA0008479942	PENDING	AVAP: APPROVED (2022015980502863711) LAZF: APPROVED (85332618806) MFC: APPROVED MFIN: DECLINED (85332800144) MQF: DECLINED (2000626593) SBALFA: E AND O (0001086890)	Not Selected	2,788.59	Query
2022-01-		LAZARUS	ALPESH		LINDIWE HOLDINGS	MAZDA MAZDA2 1.5				AVAP: DECLINED (2022015980115860956) LAZF: DECLINED	Not		

**Create Mail**

Date Created: 2022-01-03

Customer: MRS DAPHNEY SIBONGILE SMITH

Business Manager: PEET POTGIETER

Salesman: COENRAAD KLOPPER

Status: AWAITING SALES PERSON FEEDBACK

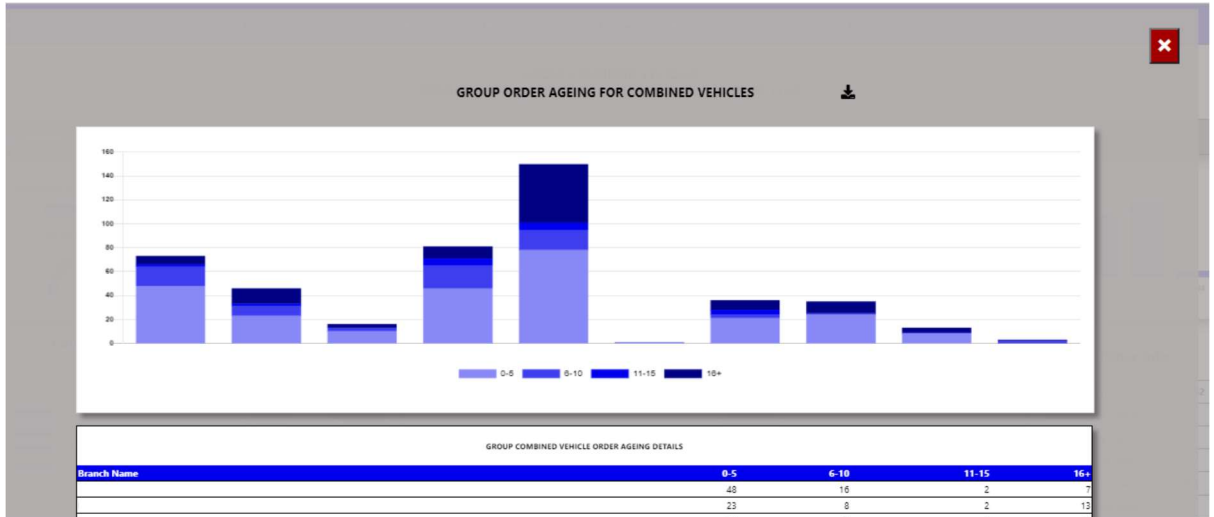
Complete By: 2022/02/01

Action: Please Type Action Required

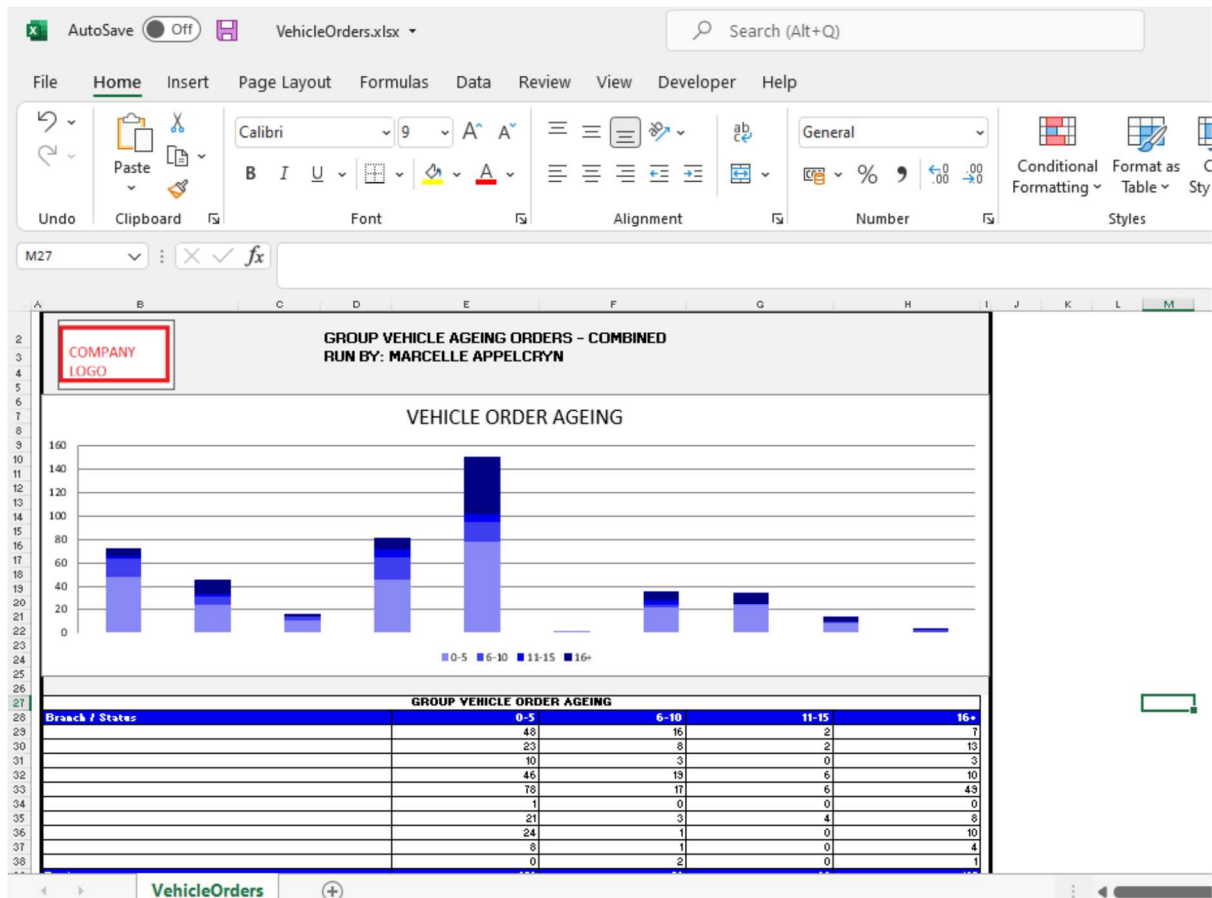
Assign To: EasiBI Support

e) Open Vehicle Orders – this calculates all open order against the vehicles.

The Info icon will then display a graph of all branches open orders and ageing.



You can then export this to an excel document with graph and the line items.



You can click on an age bracket, and it will drill down to the order that has not yet been closed. With an option to query this order number from the BI tool.

- COMBINED VEHICLE ORDERS AGEING FOR BETWEEN 16 AND 9999 DAYS

Stock Number	Order Number	Order Status	Date Created	Quoted Price	Order Detail	Days Open	F&I Transno.	Action
40EMHCVD06280	40EMVS015213	Printed	2020-02-13	1,350.00	40EMHCVD06280 ADX713111KAD06280 E-NATIS REQ, CRAIG APP, PAUL, POST SALE	720	No Match	Query
40EMMED806880	40EMVS016841	Printed	2020-09-09	1,245.00	40EMMED806880 ADX499051LAB06880 NATIS REGISTRATION REQ, CRAIG APP, PAUL, POST SALE	515	ZAEAST0007439554	Query

**Create Mail**

Stock Number:  
40EMHCVD06280

Order Number:  
40EMVS015213

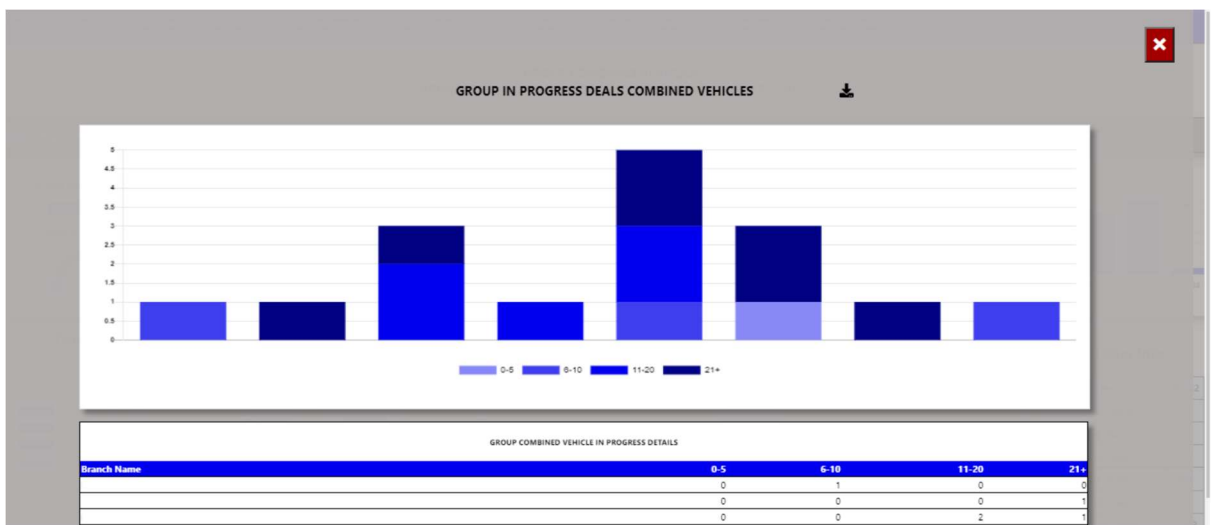
Date Created:  
2020-02-13

Quoted Price:  
1,350.00

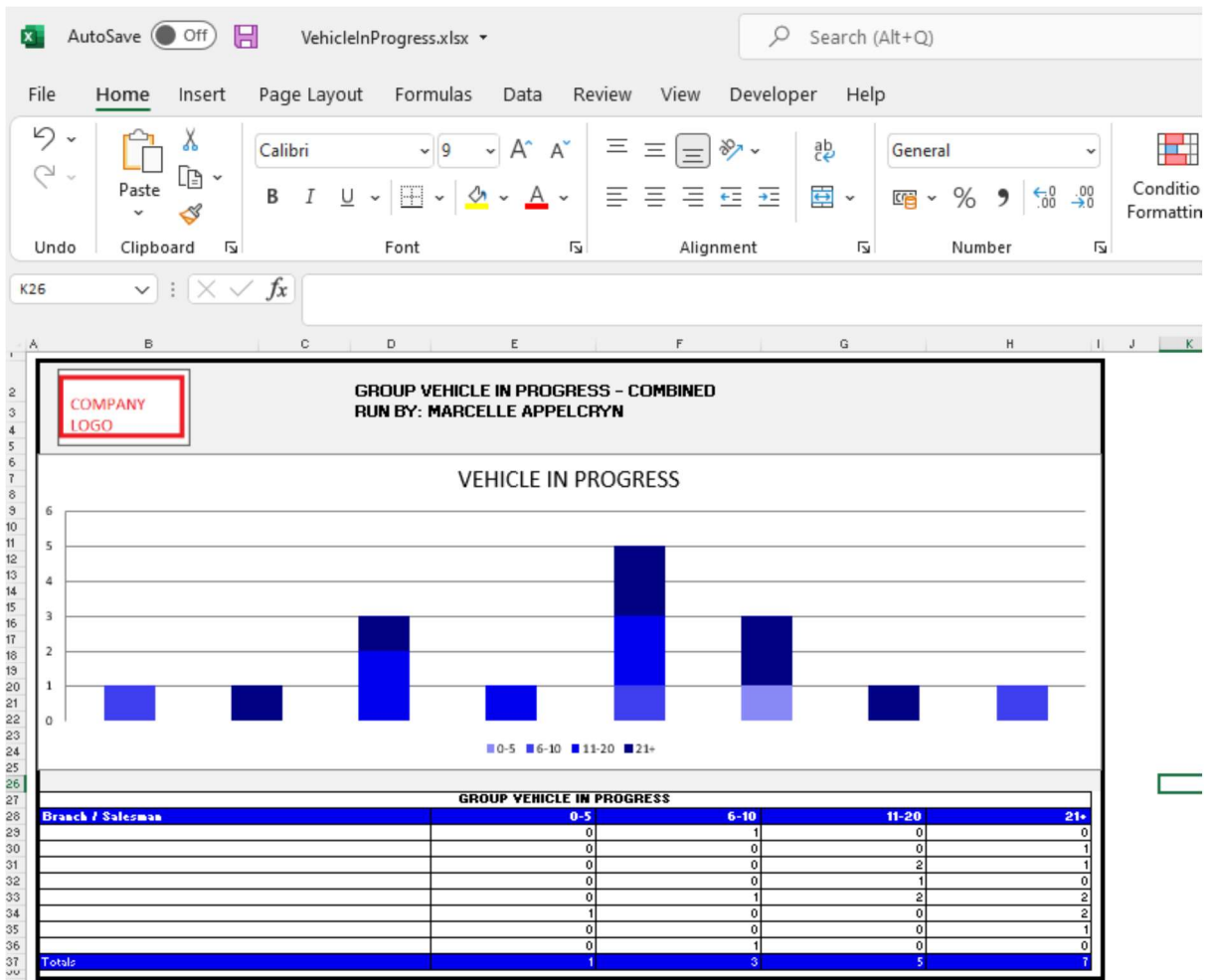
Order Detail:

f) Open Progress Deals – this calculates the total open deals in the DMS system that has been captured but not yet invoiced.

The Info icon will then display a graph ageing of each branch / Service Advisor depending on the user set up.



You can then export this to an excel document with graph and the line items.



You can click on an ageing bracket, and it will drill down to Open deal. With an option to query this Repair Order from the BI tool.

- COMBINED VEHICLE IN PROGRESS FOR BETWEEN 21 AND 9999 DAYS

Stock Number	Date Created	Vehicle	Retail	Salesman	Last Name	Days Open	Vehicle Type	Action
30EMUFL73251T	2021-06-09	FORD RANGER 2.2TDCi XLS 4x4 P/U D/C	0.00	Johan Du Plessis	Du Plessis	238	U	Query
30EMODEM104398	2021-07-27	MAZDA CX-30 2.0 DYNAMIC A/T	0.00	Reuben	MATHOLE	190	D	Query

**Create Mail**

Stock Number:

Vehicle:

Date Created:

Salesman:

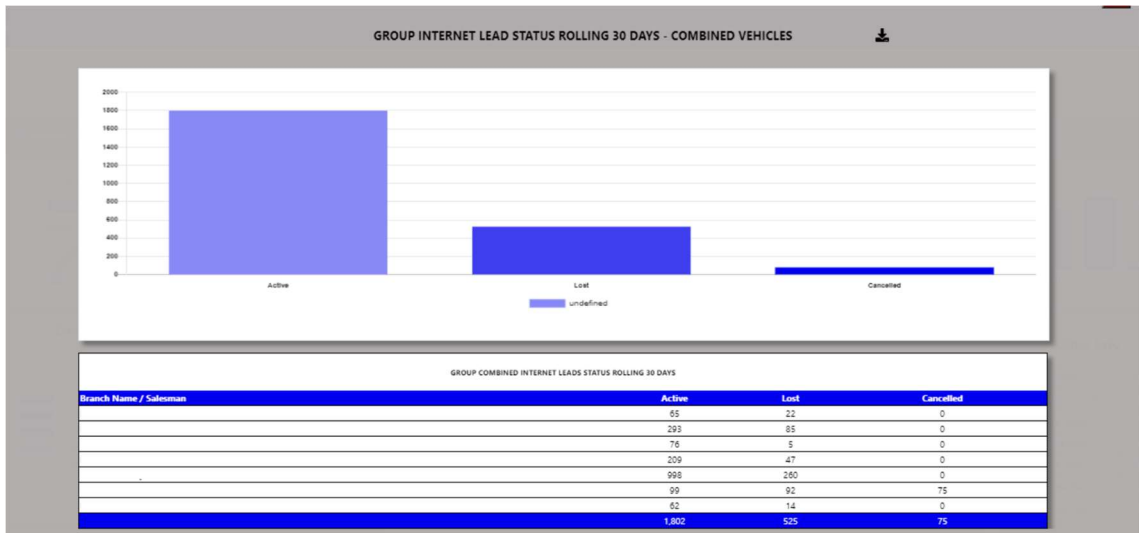
Days Open:

Complete By:

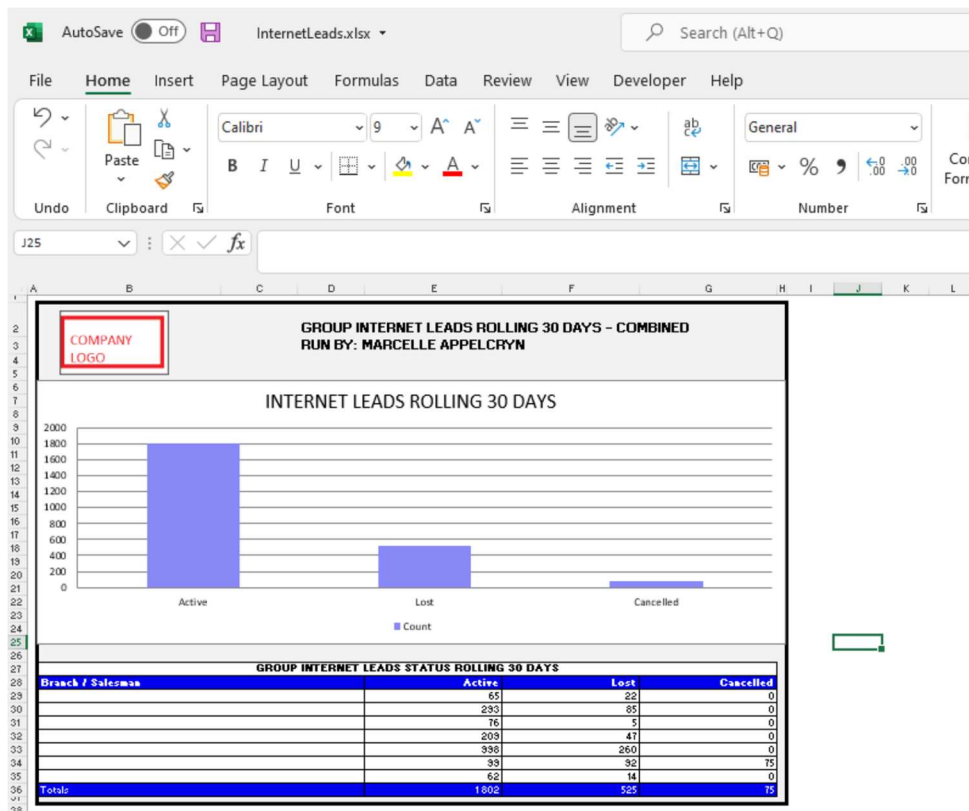


g) Active Internet Leads – this calculates the Internet Leads received that is still in active status.

The Info icon will then display a graph with leads status rolling 30 days.



You can then export this to an excel document with graph and the line items.



You can click on an ageing status, and it will drill down to leads for that selected status.

 GROUP - COMBINED LEADS FOR STATUS ACTIVE



Branch	Salesman	Date Created	Date Last Updated	Days Last Updated	Customer	Vehicle	Cancel Reason	Lead Status	Vehicle Type
		2022-01-02	2022-01-03	30	SELLO MAEBELA	FORD RANGER		Active	NEW
		2021-12-21	2022-01-03	30	Tebogo Maabane	FORD FIGO MY21.11		Active	NEW