



VEHICLES – SOLD STATS

Update Context

- 1.View.
- 2.Other Info.
- 3.Info Widget.
- 4.Top 15 Sales by Series.
- 5.Top 15 Stock by series.
- 6.Sales History.
- 7.Salesman GP.
- 8.Salesman APU.

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.

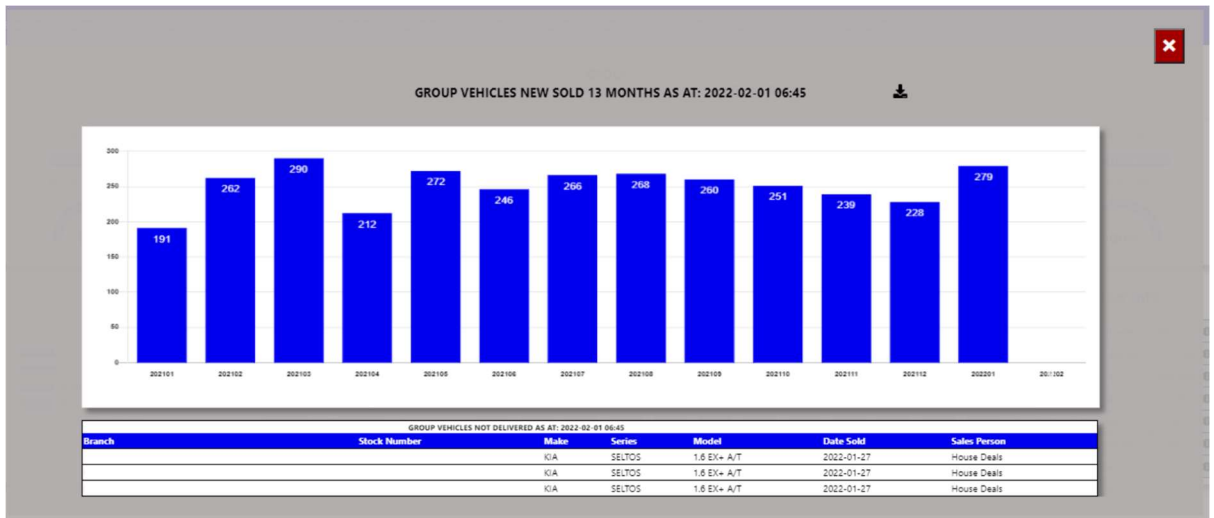


2. Other Info.

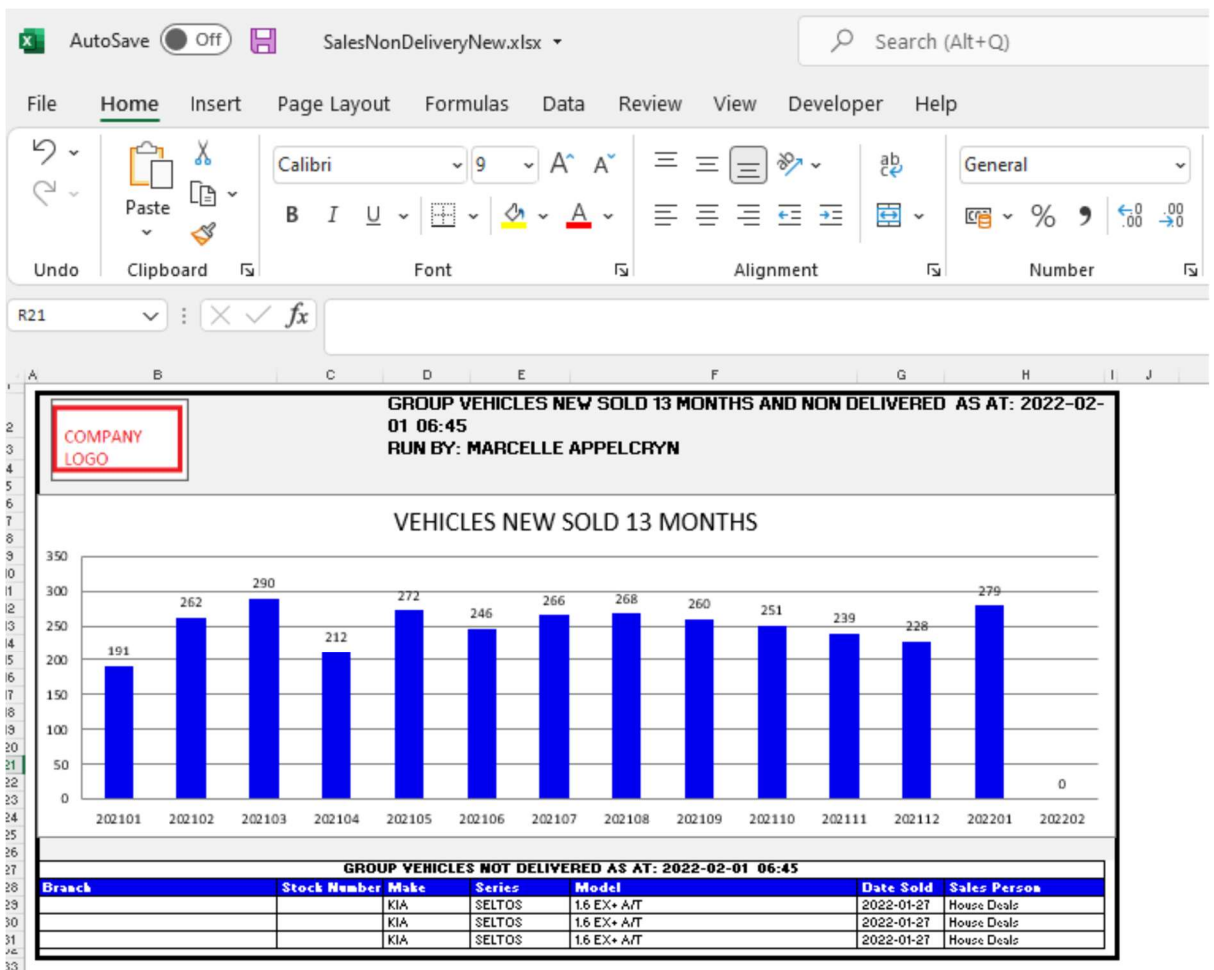
Other Info		
Sold vs Delivered	435 /716	
Invoiced (2022-02-02)	0	
F&I Awaiting Status	10	
F&I Approved Deals	277	
Open Vehicle Orders	440	
Open Progress Deals	17	
Active Internet Leads	1,802	

- 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.

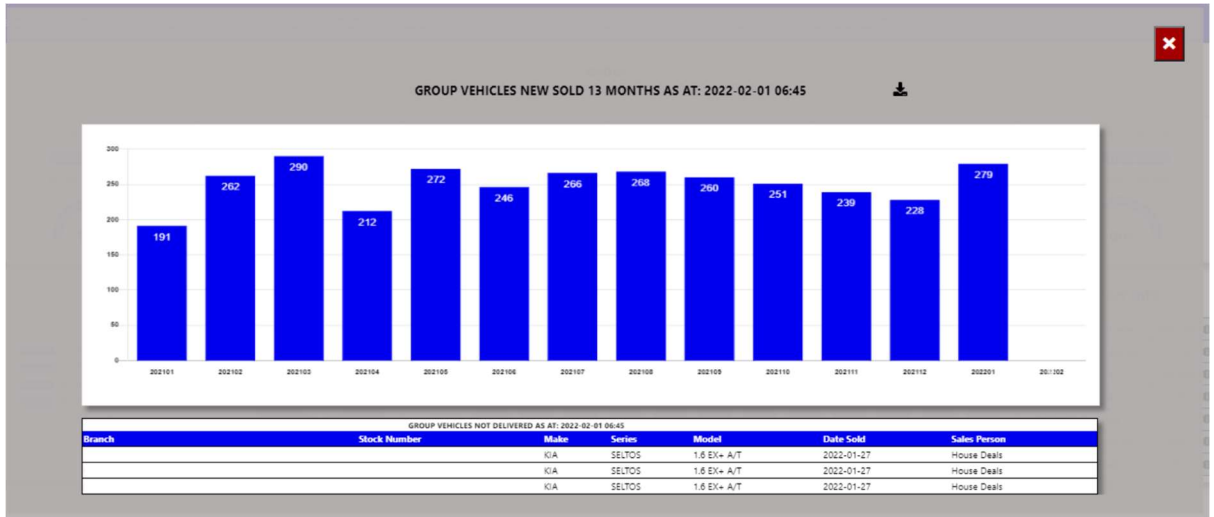
The Info icon will then display a graph of the last 12 months units and a list of vehicles that has not yet been marked as delivered.



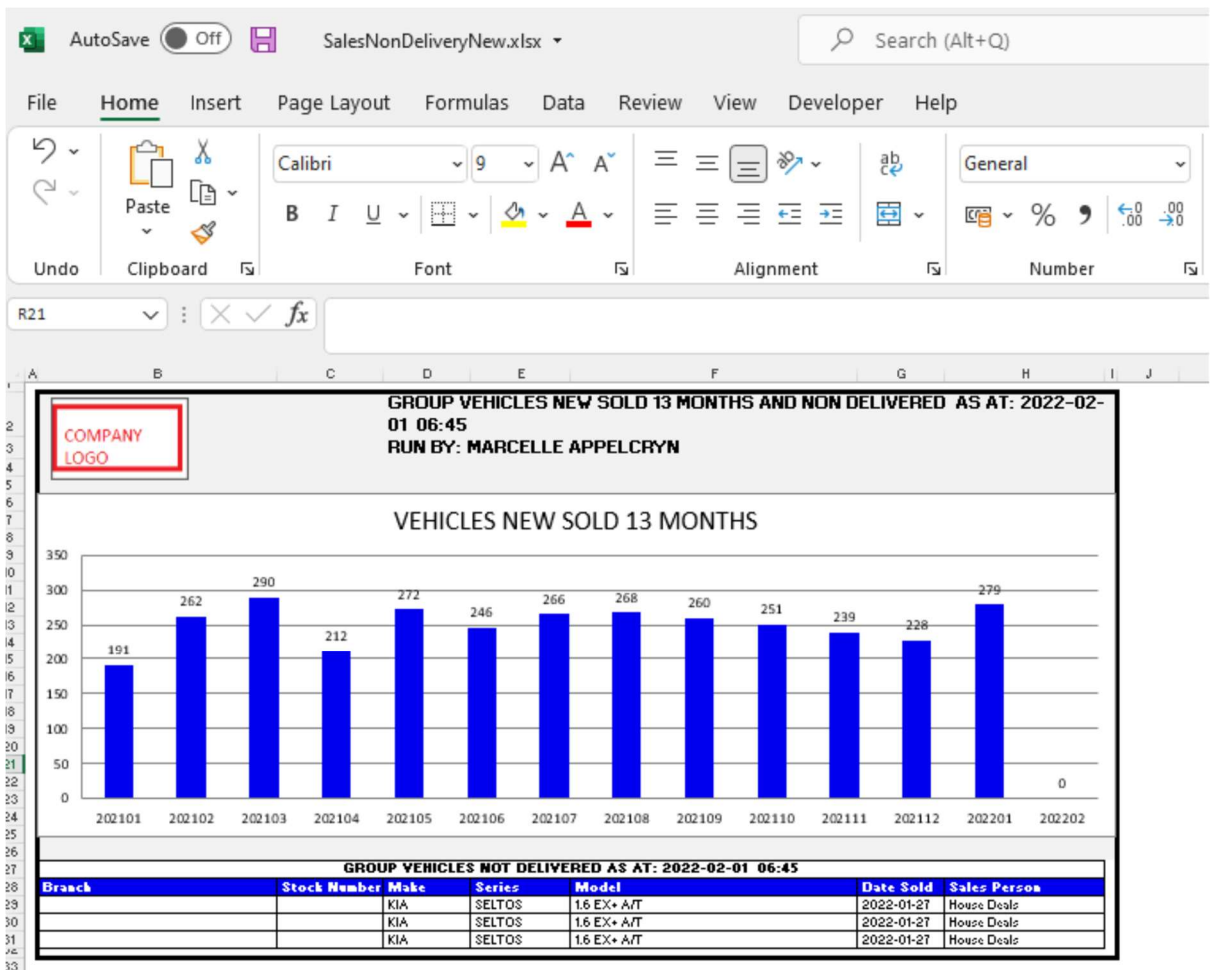
You can then export this to an excel document with graph and the line items.



- 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.

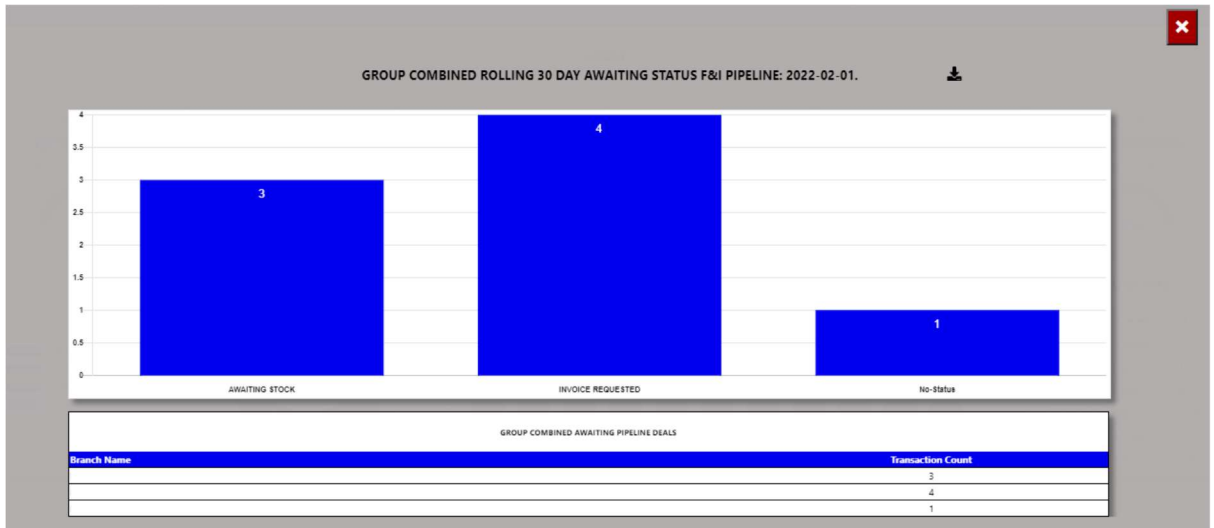


You can then export this to an excel document with graph and the line items.

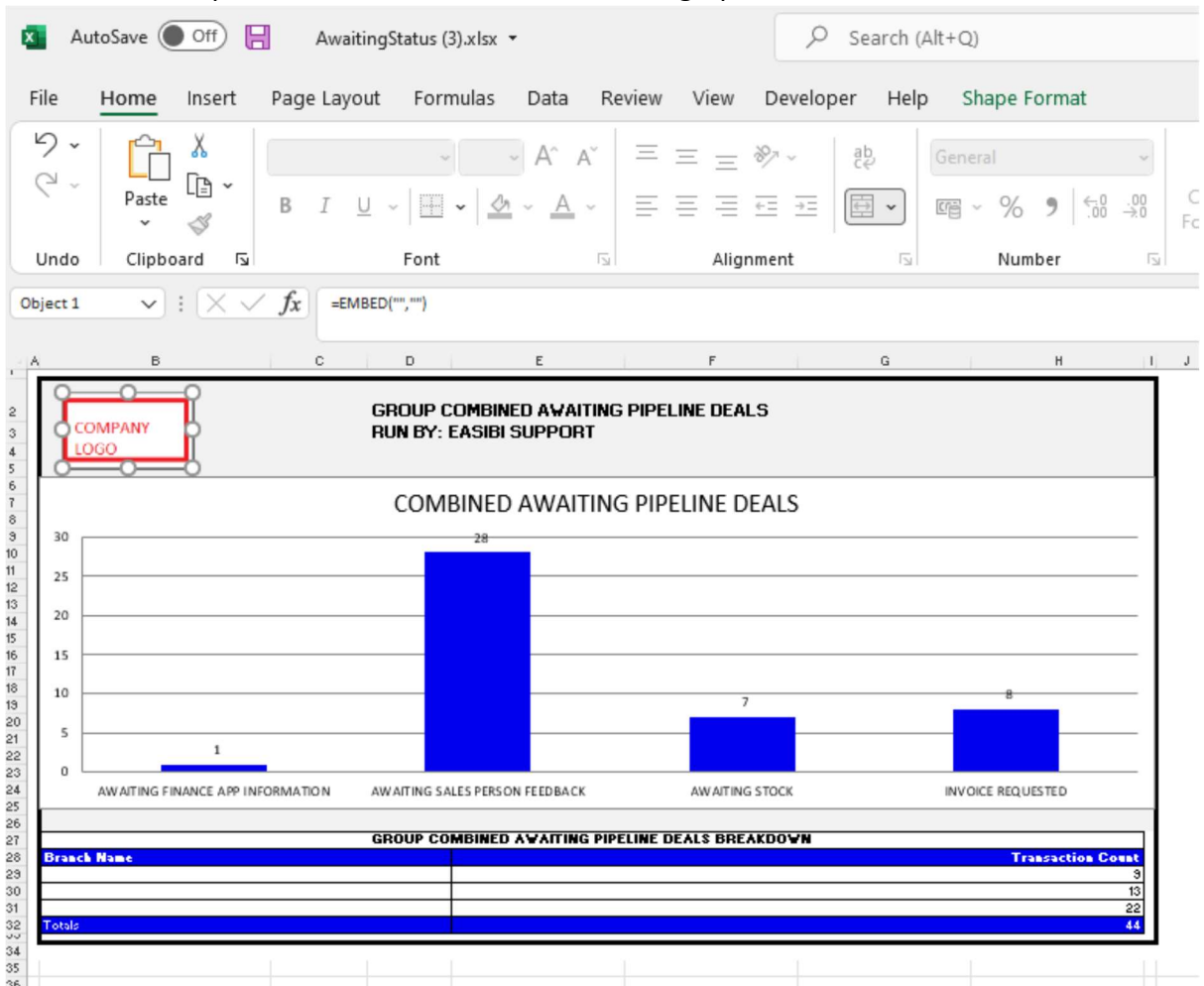


- c) F&I Awaiting Status – this calculates from the Seriti F&I system all deals that is in an awaiting status.

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 POTGIETER	COENRAAD KLOPPER	MRS DAPHNEY SIBONGILE SMITH	HONDA BALLADE 1.5 EXECUTIVE	USED	ZALAZA0008478865	PENDING	AVAP: APPROVED (2022015980502850698) LAZF: APPROVED (85332590452) MFC: APPROVED MQF: DECLINED (2000625190) SBALFA: E AND D (0001056142)	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 D (0001068890)	Not Selected	2,789.55	Query
2022-01-		LAZARUS	ALPESH		LINDIWE HOLDINGS	MAZDA MAZDA2 1.5				AVAP: DECLINED (2022015980115800950) 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

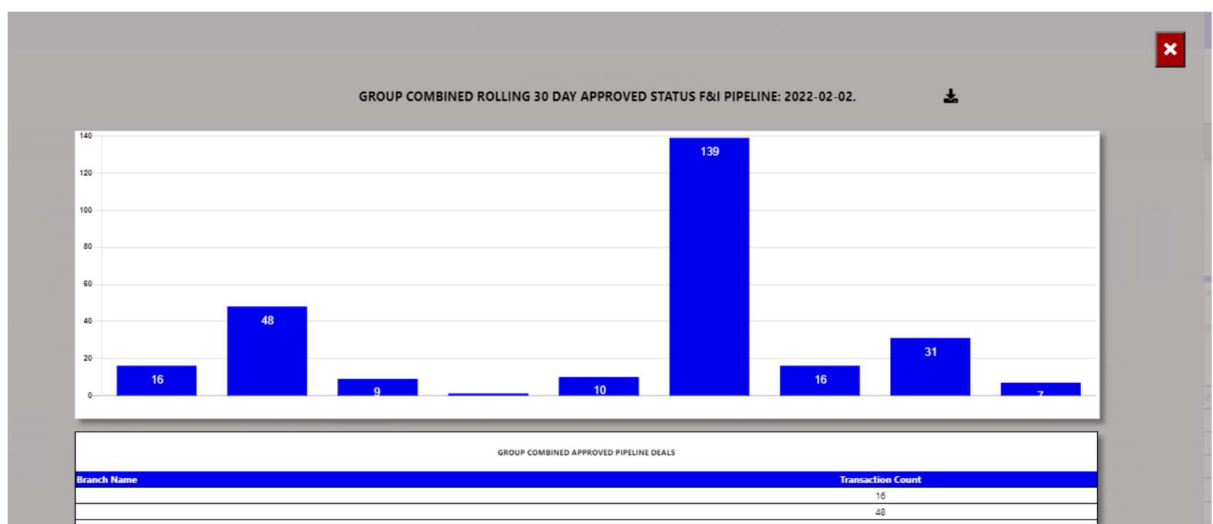
Complete By: 2022/02/01

Action: Please Type Action Required

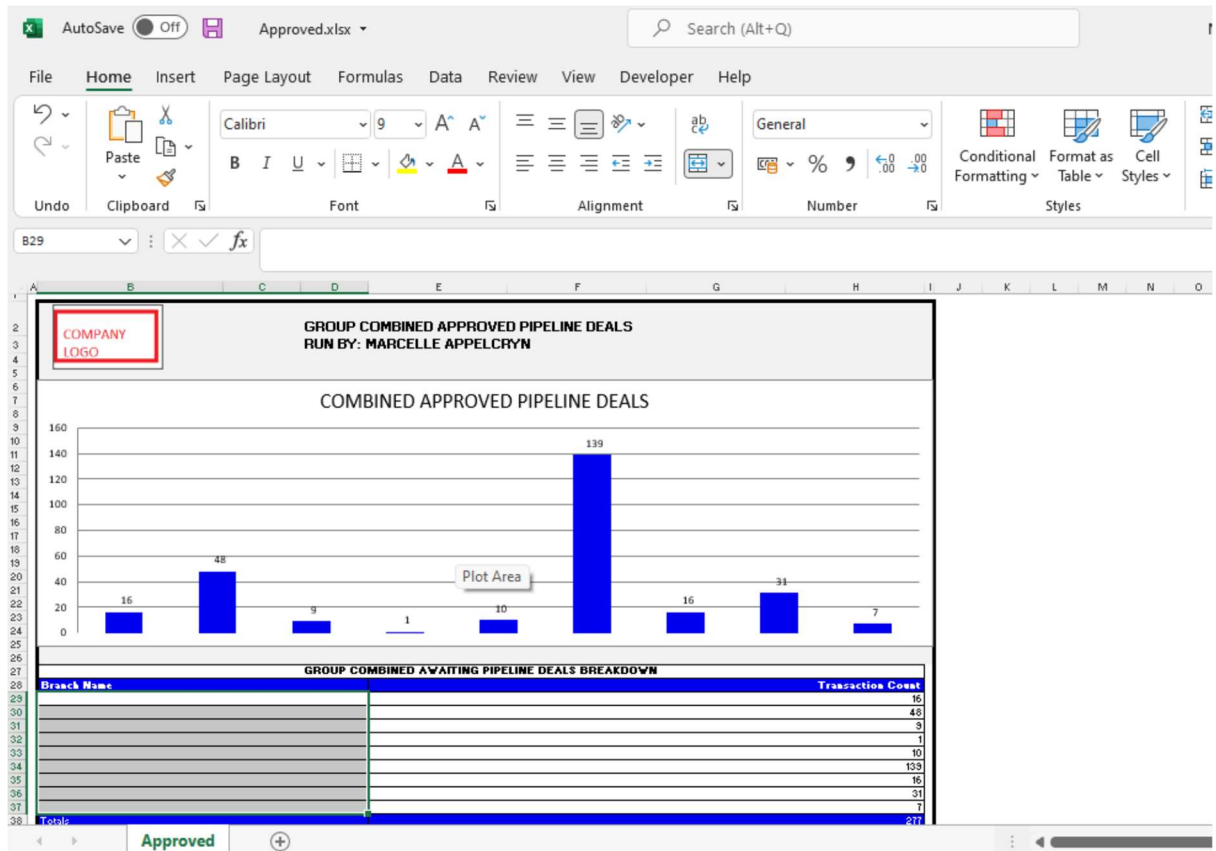
Assign To: EasiBI Support

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	ZALAZA0008478865	PENDING	AVAP: APPROVED (2022015980502860698) LAZF: APPROVED (85332590452) MFC: APPROVED MQF: DECLINED (2000625190) SBALFA: E AND D (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	AVAP: APPROVED (2022015980502863711) LAZF: APPROVED (85332618806) MFC: APPROVED MFIN: DECLINED (85332800144) MQF: DECLINED (2000626593) SBALFA: E AND D (0001068890)	Not Selected	2,788.55	Query
2022-01-		LAZARUS	ALPESH		LINDIWE HOLDINGS	MAZDA MAZDA2 1.5				AVAP: DECLINED (20220159801159800950) LAZF: DECLINED	Not		

Create Mail ✖

Date Created: 2022-01-03

Customer: MRS DAPHNEY SIBONGILE SMITH

Business Manager: PEET POTGIETER

Salesman: COENRAAD KLOPPER

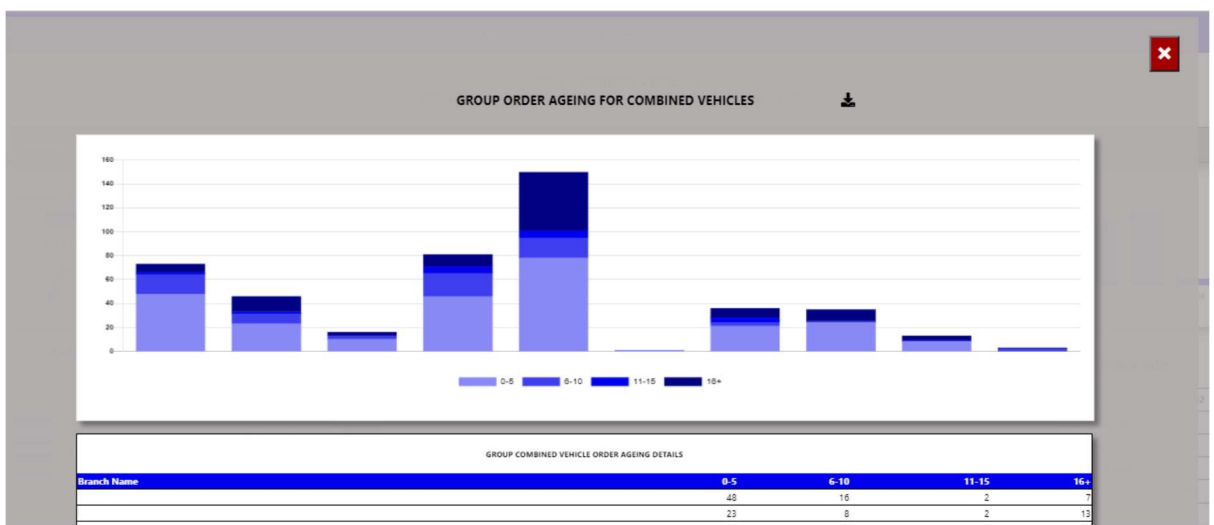
Status: AWAITING SALES PERSON FEEDBACK

Complete By: 2022/02/01 📅

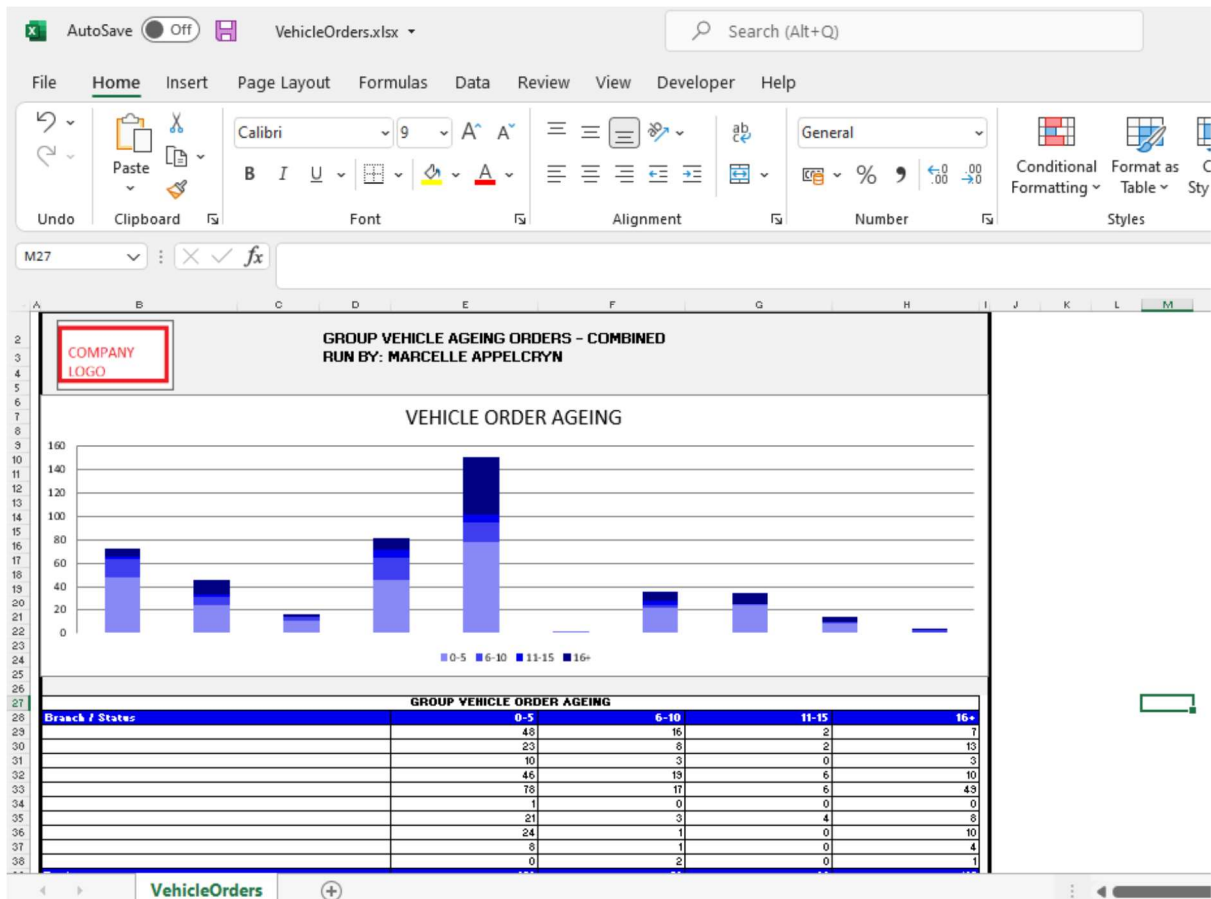
Action: Please Type Action Required

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 a 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	FBI 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
40EMMED06880	40EMVS016841	Printed	2020-09-05	1,245.00	40EMMED06880 ADX499051LAB06880 NATIS REGISTRATION REQ, CRAIG APP, PAUL POST SALE	515	2AEAST0007439554	Query

Create Mail

Stock Number:
40EMHCVD06280

Order Number:
40EMVS015213

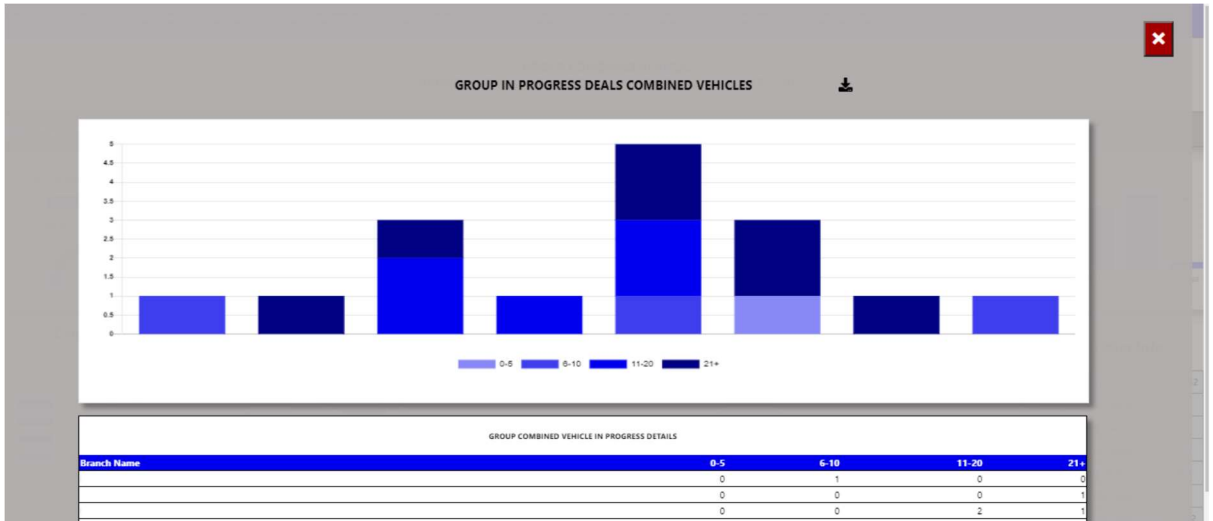
Date Created:
2020-02-13

Quoted Price:
1,350.00

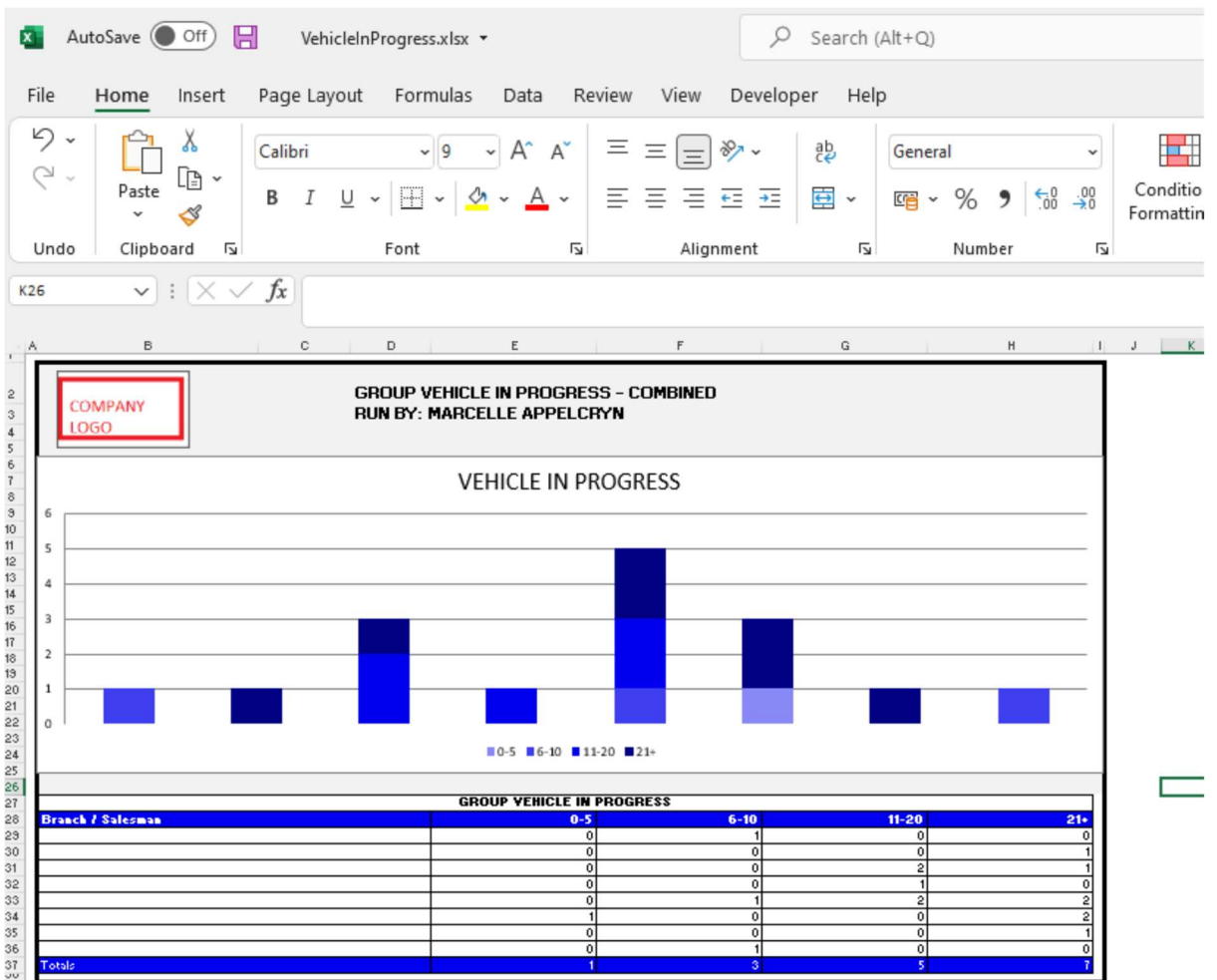
Order Detail:

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
30EMDEM104368	2021-07-27	MAZDA CX-30 2.0 DYNAMIC A/T	0.00	Reuben	MATHOLE	190	D	Query

Create Mail

Stock Number:
30EMUFL73251T

Vehicle:
FORD RANGER 2.2TDCi XLS 4X4 P/U D/C

Date Created:
2021-06-09

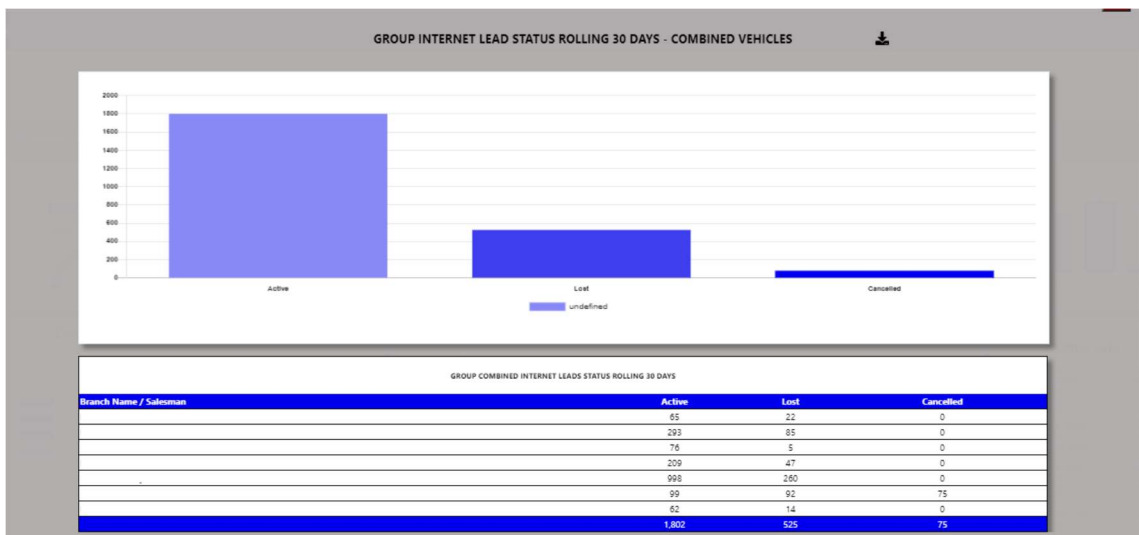
Salesman:
Johan Du Plessis

Days Open:
238

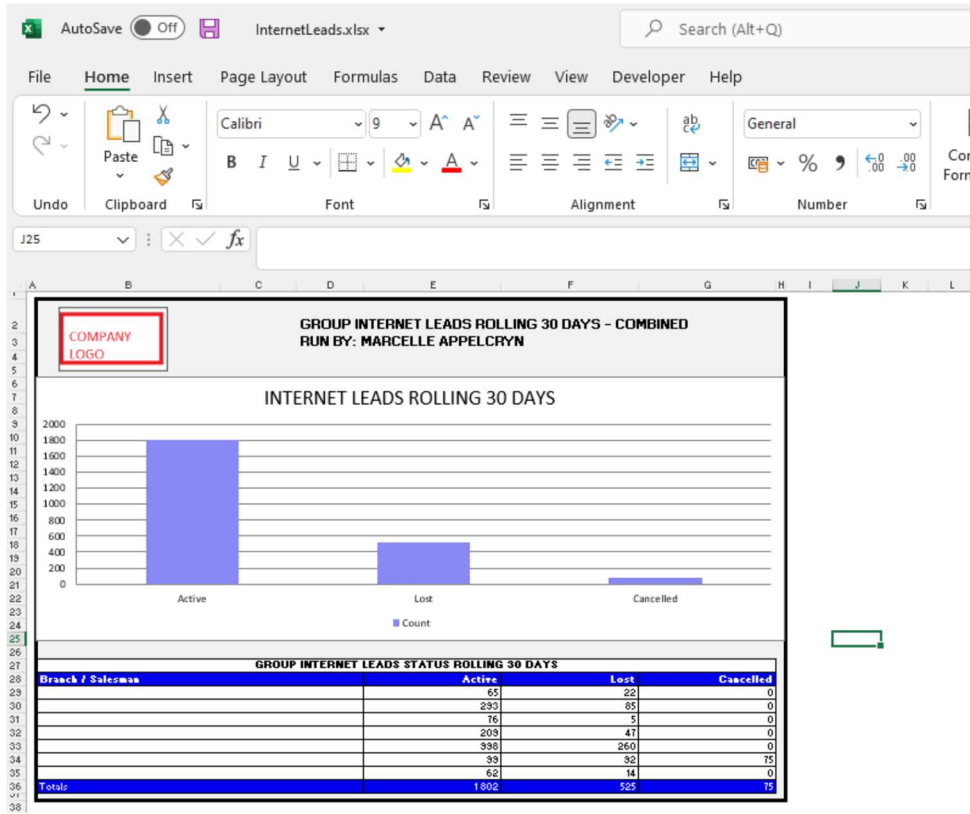
Complete By:

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

3. Info Widget.

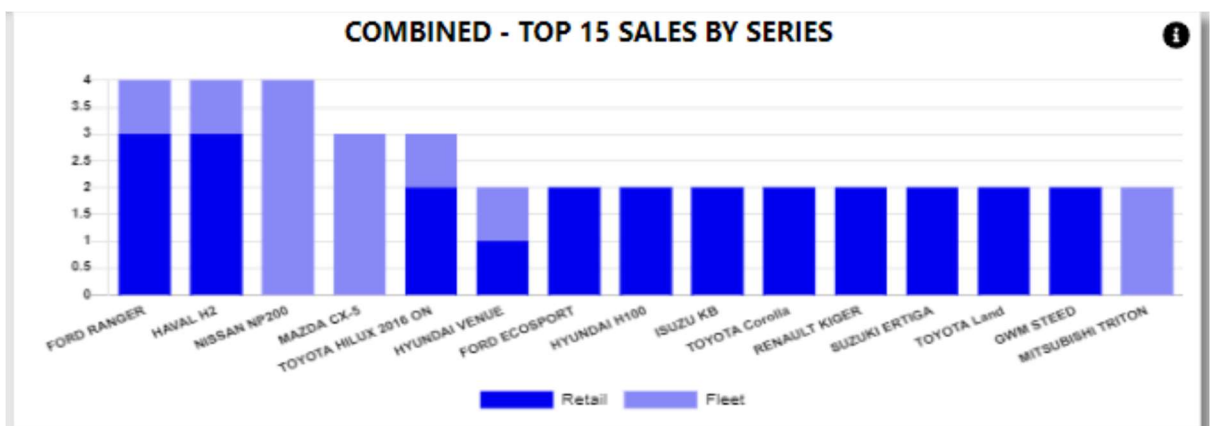
Depending on selection as above.



- 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. Sales By Series.

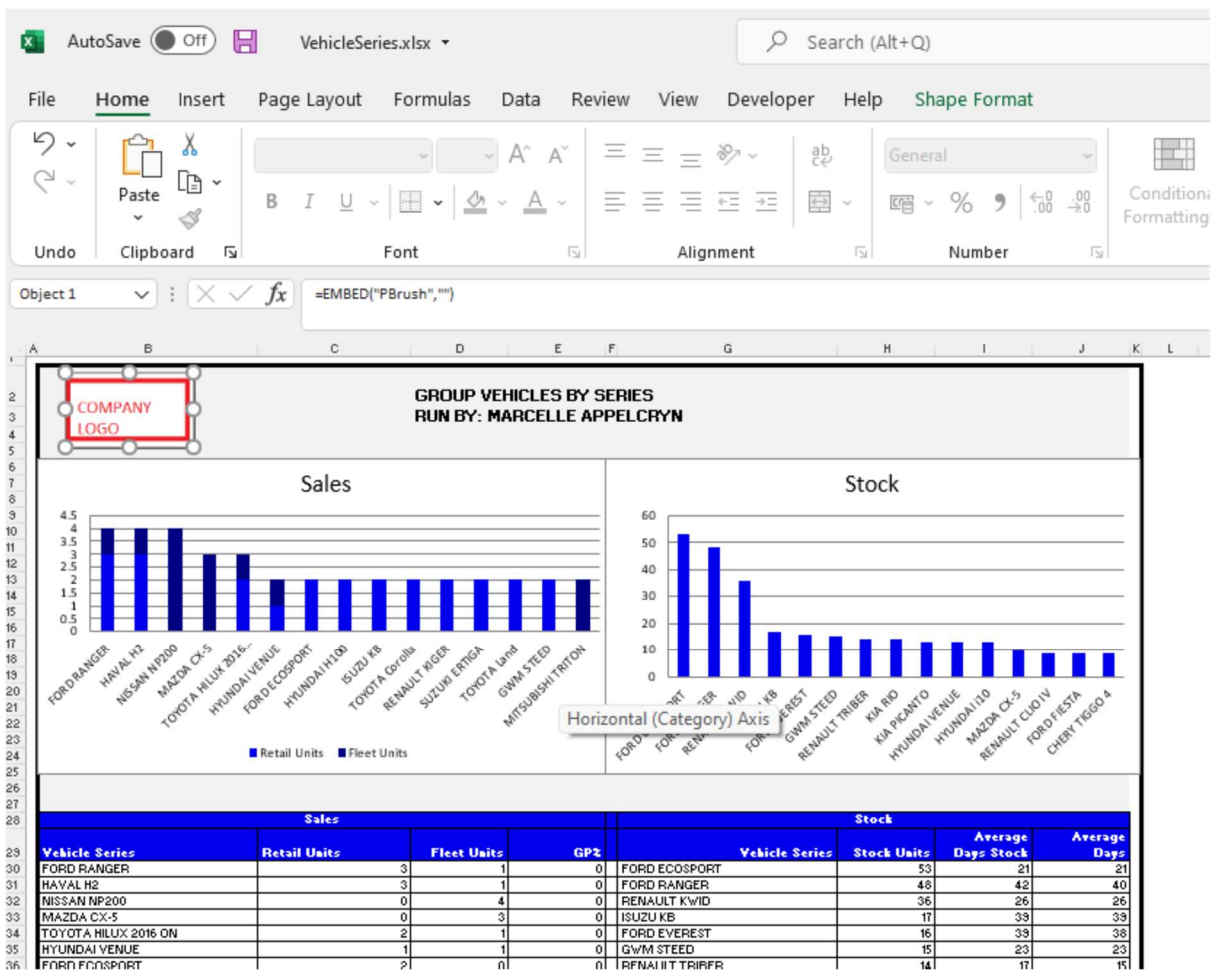
The Graph displays the top 15 sales by series.



The Info icon will then display a graph with the details.

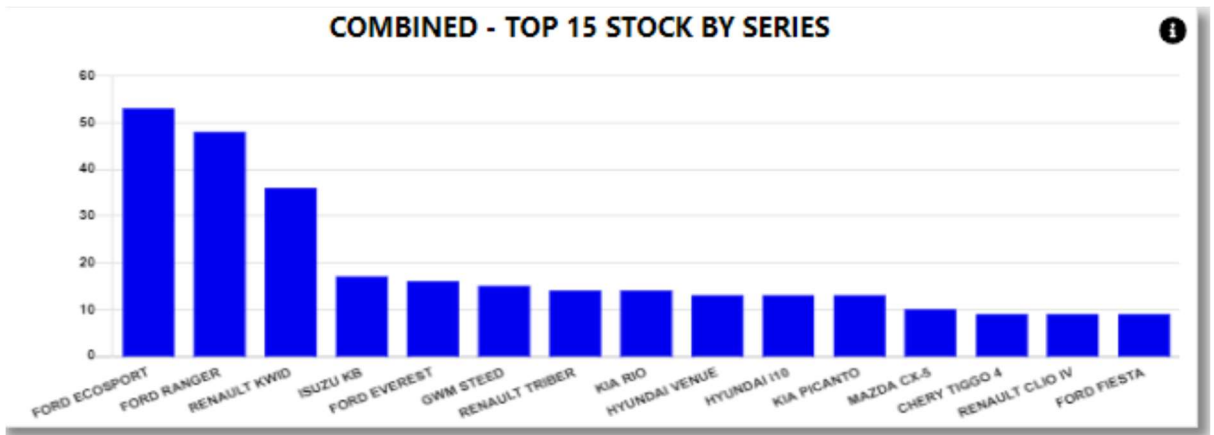


You can then export this to an excel document with graph and the line items.



5. Stock By Series.

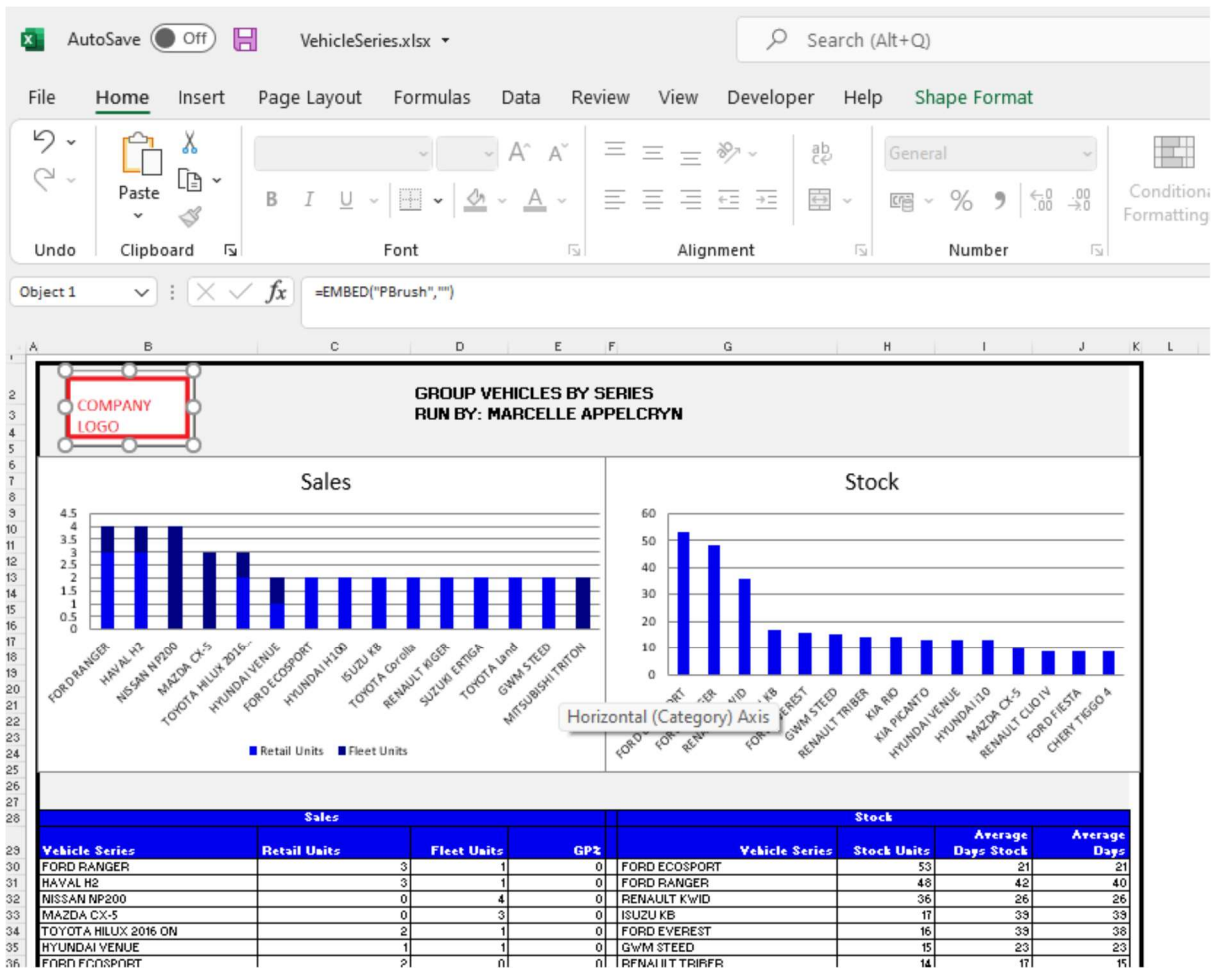
The Graph displays the top 15 stock by series.



The Info icon will then display a graph with the details.

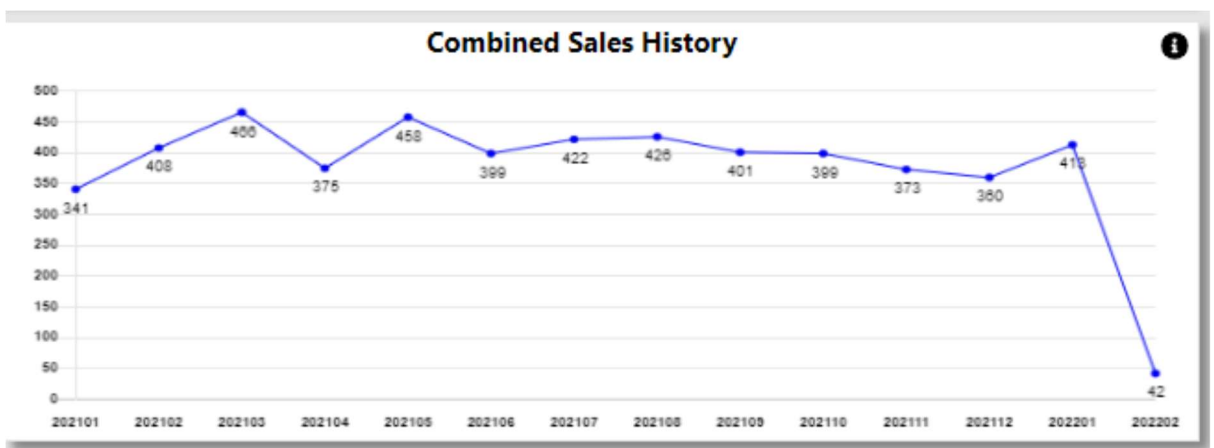


You can then export this to an excel document with graph and the line items.

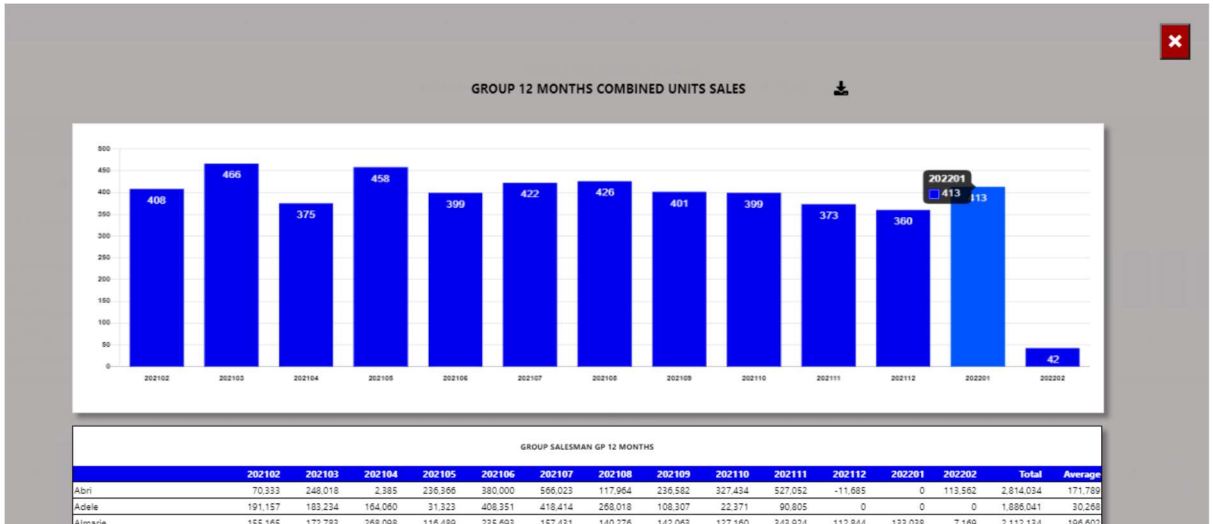


6. Sales History.

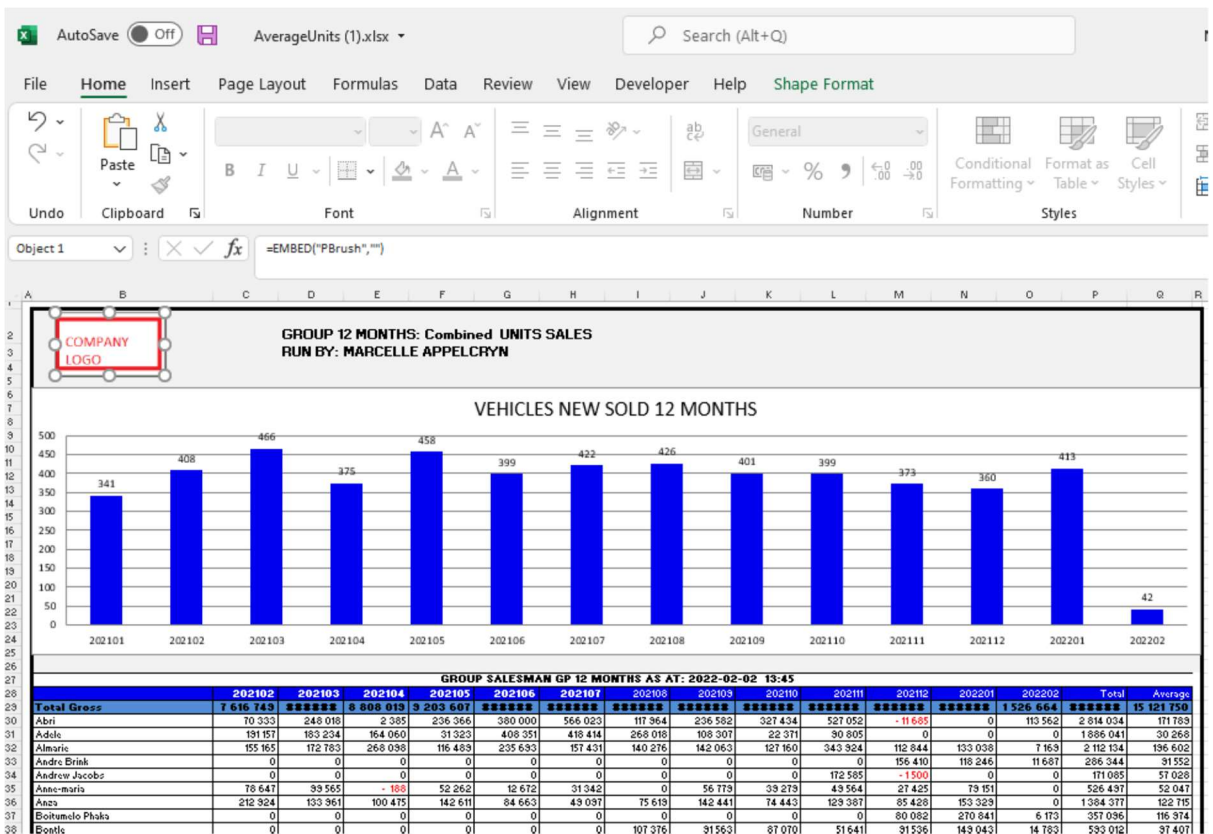
The Graph 12-month units sales.



The Info icon will then display a graph with the details.



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

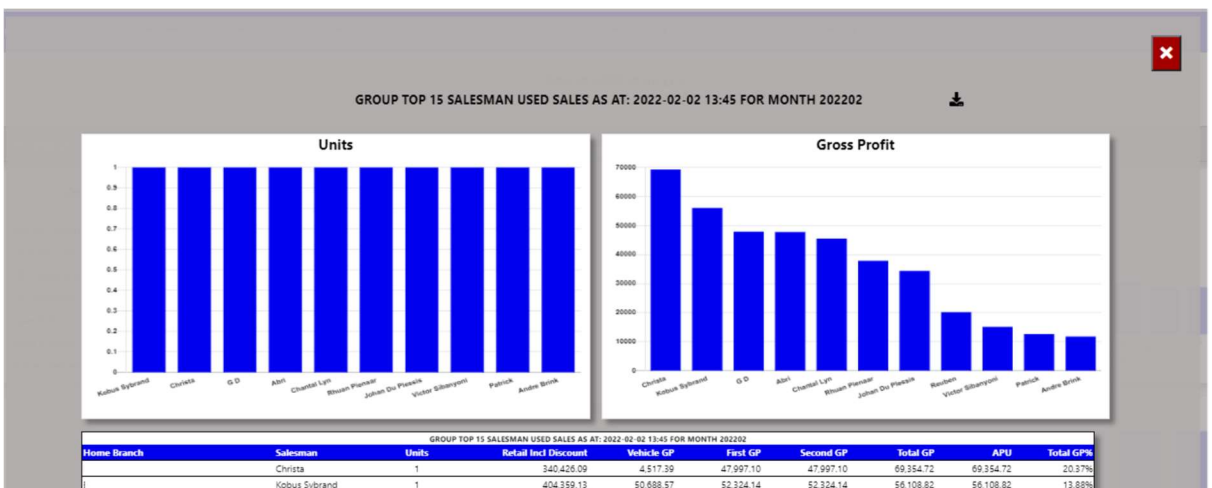


7.Salesman Gross Profits.

If User is set up Group, it will display the top 15 Salesman with highest gross profit. If branch is selected all salesman from that branch will display.



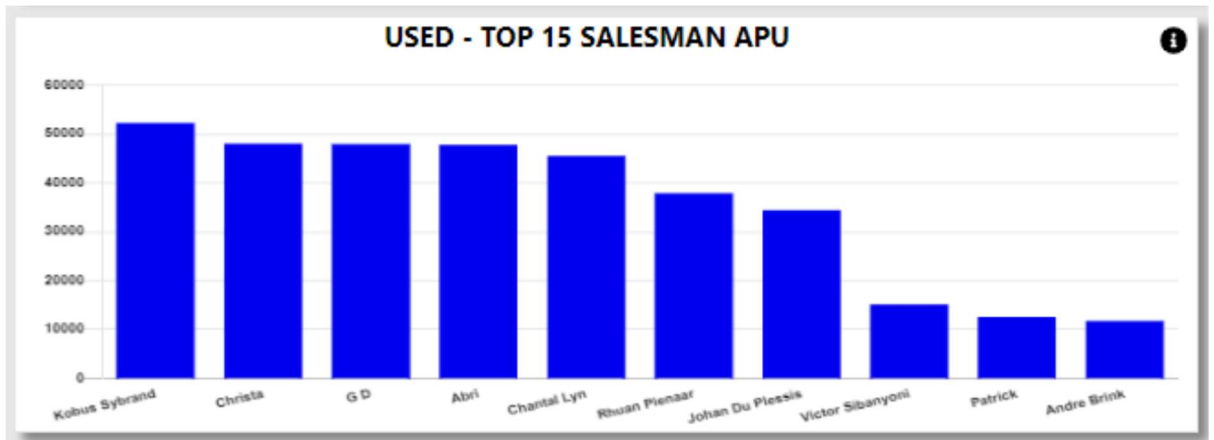
With the information Icon you can then drill down to Unit / Gross Profit per salesman for the last 12 months.



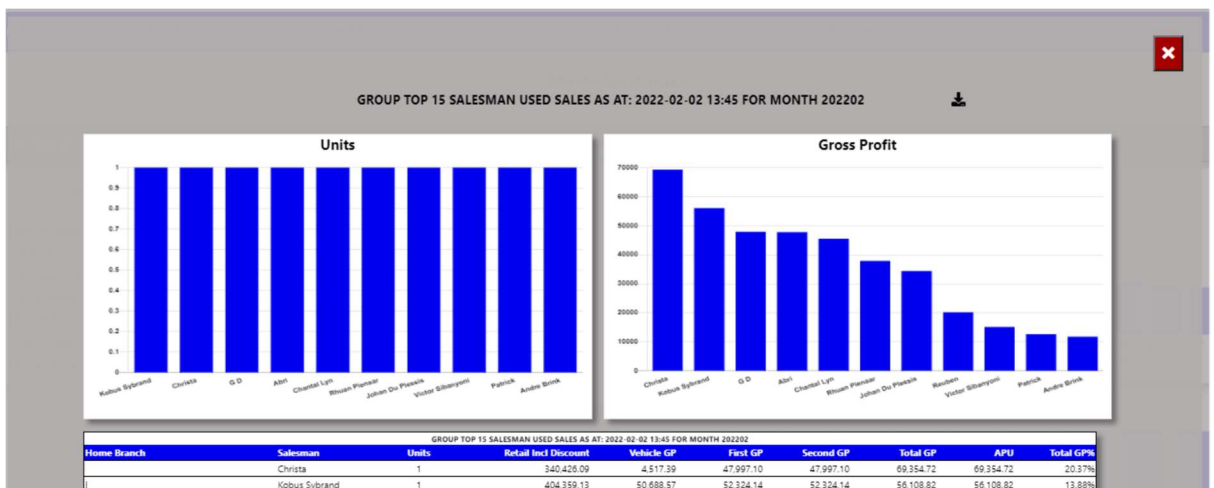
You can export the above view to excel including the graph and individual salesman details will export for the last 12 months.

8.Salesman Average Per Unit.

If User is set up Group, it will display the top 15 Salesman with highest average per unit. If branch is selected all salesman from that branch will display.



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.

AutoSave Off Salesman (10).xlsx - Repaired Search (Alt+Q)

File Home Insert Page Layout Formulas Data Review View Developer Help

Undo Clipboard Font Alignment Number Styles

Q21

COMPANY LOGO

**GROUP EXPENSE MOVERS MORE THAN 20% INCREASE
RUN BY: MARCELLE APPELCRYN**

Units

Salesman	Units
Christa	1
Kobus Sybrand	1
G D	1
Abri	1
Chantal Lyn	1
Rhuan Pienaar	1
Johan Du Plessis	1
Victor Sibanyoni	1
Jhb Dzal	1
Patrick	1
Andre Brink	1

Gross Profit

Salesman	Gross Profit
Christa	70000
Kobus Sybrand	55000
G D	45000
Abri	45000
Chantal Lyn	45000
Rhuan Pienaar	35000
Johan Du Plessis	35000
Victor Sibanyoni	15000
Jhb Dzal	15000
Patrick	15000
Andre Brink	15000

Home Branch	Salesman	Units	Incl Discount	Vehicle GP	First GP	Second GP	Total GP	APU	Total GP2
	Christa	1	340 426	4 517	47 997	47 997	63 355	63 355	20%
	Kobus Sybrand	1	404 359	50 689	52 324	52 324	56 109	56 109	14%
	G D	1	539 130	45 600	47 925	47 925	47 925	47 925	3%
	Abri	1	539 043	46 890	47 760	47 760	47 760	47 760	8%
	Chantal Lyn	1	252 229	43 442	45 484	45 484	45 484	45 484	18%
	Rhuan Pienaar	1	303 779	14 122	31 902	31 902	31 847	31 847	12%
	Johan Du Plessis	1	121 652	23 661	31 903	34 381	34 381	34 381	28%
	Victor Sibanyoni	1	99 996	13 064	15 107	15 107	15 107	15 107	15%
	Jhb Dzal	1	99 185	12 106	14 148	14 148	14 148	14 148	14%
	Patrick	1	86 957	10 709	12 534	12 534	12 534	12 534	14%

Salesman