

# 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.

	O Combin	ed 🔍 New 🔍 Used
	PROGRESS FOR WORKING DAY	2/20 AS AT: 2022-02-02 AT 12:45
Combined ● New ● Used		
Other Info	Quick Info Combined Vehicle GP Contributions 5%k Retail & Frieet Units: 41 Other Sales Units: 22 Average Units 3 Months (R&F): 435 Previous Month Units (R&F): 435 Average Expenses 3 Months: 7,272.087	COMBINED - TOP 15 SALESMAN ACTIVE LEADS
Averag	e Combined Units vs Actual Units	COMBINED - TOP 15 SALESMAN UNITS
250000	BINED - TOP 15 SALESMAN GP	COMBINED - TOP 15 SALESMAN APU

2. Other Info.

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

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.



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					1.50.1	1000100	1.				150		Lineare means		-

 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.





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 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	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 5Dr	USED	ZALAZA0008479942	PENDING	AVAF: APPROVED (2022015980502863711) LAZF: APPROVED (85332618806) MFC: APPROVED MFIN: DECLINED (85332800144) MQF: DECLINED (2000626593) SBALFA: E AND O (0001068890)	Not Selected	2,788.59 Query
2022-01-		LAZARUS	ALPESH		LINDIWE HOLDINGS	MAZDA MAZDA2 1.5				AVAF: DECLINED (2022015980115860956) LAZF: DECLINED	Not	_

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Create Mail		×
Date Created:		
2022-01-03		
Customer:		
MRS DAPHNEY SIBONGILE SMITH		
Business Manager:		
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Salesman:		
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Status:		
AWAITING SALES PERSON FEEDBACK		
Complete By:		
2022/02/01		
Action:		
Please Type Action Required		
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EasiBI Support Y		

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.



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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.

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	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 5Dr	USED	ZALAZA0008479942	PENDING	AVAF: APPROVED (2022015980502863711) LAZF: APPROVED (85332618806) MFC: APPROVED MFIN: DECLINED (85332800144) MQF: DECLINED (2000626593) SBALFA: E AND O (0001068890)	Not Selected	2,788.59	Query
2022-01-		LAZARUS	ALPESH		LINDIWE HOLDINGS	MAZDA MAZDA2 1.5				AVAF: DECLINED (2022015980115860956) LAZF: DECLINED	Not		_

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

Create Mail		
Date Created:		
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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 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		×	
tock Number	Order Number	Order Status	Date Created	Quoted Price	Order Detail	Days Open	F&I Transno. Action	
0EMHCVD06280	40EMVS015213	Printed	2020-02-13	1,350.00	40EMHCVD06280 ADX713111KAD06280 E-NATIS REQ: CRAIG APP: PAUL POST SALE	720	No Match Query	
JEMMEDB06880	40EMVS016841	Printed	2020-09-05	1,245.00	40EMMEDB06880 ADX499051LAB06880 NATIS REGISTRATION REQ; CRAIG APP: PAUL POST SALE	515	ZAEAST0007439554 Query	
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40	EMVS0152	13						
Date	Created:							
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Quot	ed Price:							
1,3	50.00							
Orde	r 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.



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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.

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			Exception 1					
Stock Number	Date Created	Vehicle	Retail	Salesman	Last Name	Days Open	Vehicle Type	Action
30EMDEM104368	2021-00-09	MAZDA CX-30 2 0 DYNAMIC A/T	0.00	Beuben	MATHOLE	190	D	Query
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Stock Number:								×
30EMUFL73251	T.							
Vehicle:						_		
FORD RANGER	2.2TDCi XLS 4X	4 P/U D/C						
Date Created:								
2021-06-09								
Salesman:						_		
Johan Du Plessis	S							
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 click on an ageing status, and it will drill down to leads for that selected status.

		×							
Branch	Salesman Date Date Created Upda		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.

Combined Vehicle GP Contribution: 47%
Retail & Fleet Units: 435
Other Sales Units: 152
Average Units 3 Months (R&F): 590
Previous Month Units (R&F): 576
Average Expenses 3 Months: 8,187,456

- Vehicle GP Contribution → This display a calculation of what the department is contributing towards the total Gross profit for all departments.
- Retail & Fleet Units  $\rightarrow$  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  $\rightarrow$  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.

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#### 5. Stock By Series.

The Graph displays the top 15 stock by series.



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





#### 6. Sales History.

The Graph 12-month units sales.



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





### 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.

