ONLINE SHOPPER &
Automatic Training Guide

WELCOME TO ONLINE SHOPPER & AUTOMATIC!

In this Guide, you will learn how customers or shoppers can experience our Modern Retailing tool, and how dealers can work the deal through Automatic!

Join our Live Workshop!

The following icons will appear throughout this Guide, so let's introduce you to them!

Home
Click the home button to navigate back to the Table of Contents (located on the next page). From the Table of Contents, you will be able to quickly view new sections.

How-To Summary
Look for our How-To's for a brief summary of specific features within Online Shopper!

Best Practices
How to is important, but we didn't want to leave out the strategy!

CLICK THE TITLES TO NAVIGATE TO THAT SECTION.

Click each section above to dive directly into a topic, or start scrolling ⏬
to explore all that Online Shopper and Automatic have to offer!

Customer Experience

Meet our shopper, Brooks. 👋 Brooks is browsing your site looking for a car from his couch! Before visiting your dealership he can customize their favorite model and monthly payment, and ask questions directly from his garage!
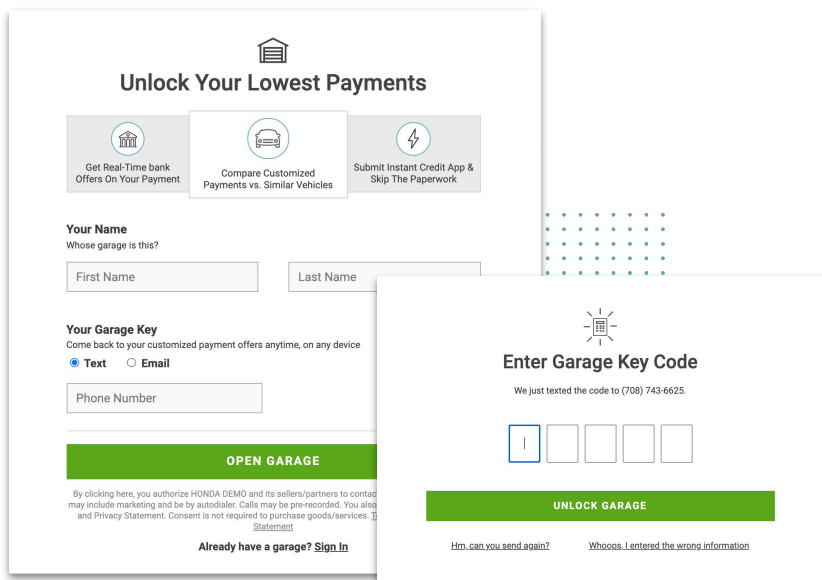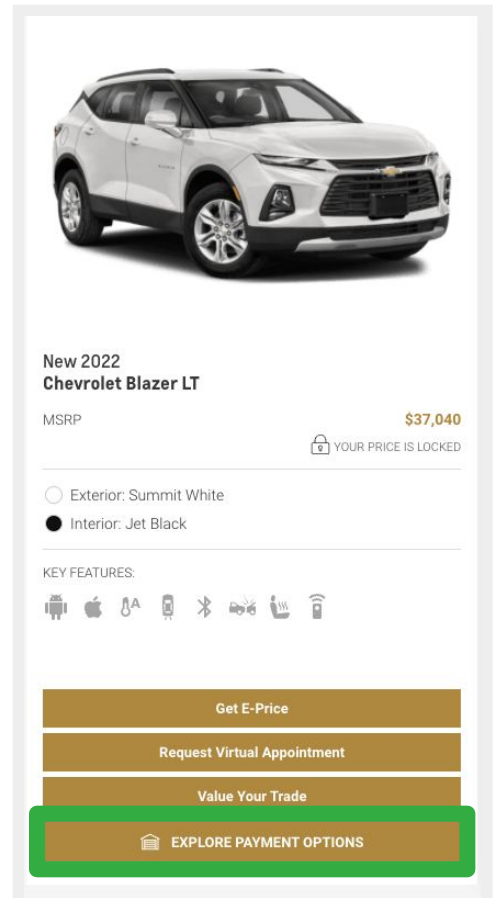
From your website, your shoppers can add inventory to their garage to compare prices, add upgrades, and select the right bank rate offer for them.

When a customer clicks Payment Options, this will prompt them to start their own garage. The customer may see:
- **View** Payment Options
- **Show** Payment Options
- **Explore** Payment Options

The customer will then be asked to add in the following personal information: First & Last Name and either Phone Number or Email.

They will receive a Garage PIN via SMS or email (depending on the information they provided).

New 2022
Chevrolet Blazer LT

MSRP $37,040

🔒 YOUR PRICE IS LOCKED

○ Exterior: Summit White
● Interior: Jet Black

KEY FEATURES:

Get E-Price

Request Virtual Appointment

Value Your Trade

🏠 EXPLORE PAYMENT OPTIONS

🏠
Unlock Your Lowest Payments

Get Real-Time bank Offers On Your Payment

Compare Customized Payments vs. Similar Vehicles

Submit Instant Credit App & Skip The Paperwork

Your Name
Whose garage is this?

First Name | Last Name

Your Garage Key
Come back to your customized payment offers anytime, on any device
● Text ○ Email

Phone Number

OPEN GARAGE

By clicking here, you authorize HONDA DEMO and its sellers/partners to contact may include marketing and be by autodialer. Calls may be pre-recorded. You also and Privacy Statement. Consent is not required to purchase goods/services. Statement

Already have a garage? **Sign In**

Enter Garage Key Code
We just texted the code to (708) 743-6625.

UNLOCK GARAGE

Hm, can you send again?   Whoops, I entered the wrong information

Customer Experience

Customized Payment

Adjusting payment information allows you to see an estimated monthly payment at the top of the window.

Customers can update:
- Payment Type: Finance, Lease, or Cash

- Zip Code

- Term Length

- Annual Miles (if Lease is selected)

- Amount Due at Signing / Down Payment

- Credit Rating
  Click "Don't know your score?" to determine score

- Trade In Information
  A customer can get an estimated trade evaluation

Trade-In Questions

The customer will be prompted to input their vehicle, miles on that vehicle, how much they owe on the trade-in, and what condition the vehicle is in.

Customer Experience

Note: If you do not have Conversations, DI's chat messaging tool, shoppers will not see **Live Chat** or be able to message the dealership in their garage.

In the Garage

Click **Add a Vehicle to Compare** to return to VRP and select another vehicle to add to your garage. Within their garage, briefly customers can compare payments side by side.

In the garage, they can adjust the deal by clicking in the respective fields based on their Payment Type:

Finance
- Term
- Down Payment
- Trade In Value
- Your Offer
- Upgrades

Lease
- Term
- Lease Mileage
- Amount Due at Signing
- Trade In Value
- Your Offer
- Upgrades

Cash
- Trade In Value
- Upgrades

Customer Experience

Settings

By clicking **Settings**, customers can:

- Update their zip code
- Adjust their credit rating
- Sign Out
- Delete Garage

Live Chat

By clicking **Live Chat,** customers can:

- Message the dealership with questions

- Get responses live and get questions answered about inventory

Type your message in the box shown above.

If you do not have Conversations, DI's chat messaging tool, shoppers will not see **Live Chat**, or be able to message the dealership in their garage.

If you'd like this enabled, please reach out to sales@dealerinspire.com

Customer Experience

New 2024 Chevrolet Malib...
1G1ZB5ST0RF111933

$440.74/ month ⓘ

View Estimated Offer ›

EXPLORE MORE ⌄

Continue Deal Online ›

Reserve Vehicle ›

CARS powered by ONLINE SHOPPER

New 2024 Chevrolet Malibu LS Front Wheel Drive Sedan
1G1ZB5ST0RF111933

$440.74 / month ⓘ
View Estimated Offer ›

Back to Garage

Hey Brooks! Here's Your Offer.

Quick Credit App — ①
Confirm your payment estimate with a quick credit application ›

Add Trade-In — ②
Add your Trade-In value to your payment calculation ›

Schedule Delivery or Pickup — ③
Request an Appointment ›

Actual monthly payments will vary. Financing offers presented above are conditioned on you satisfying additional requirements or stipulations that the dealer will communicate to you. APR is an abbreviation for Annual Percentage Rate. Your APR may differ based on loan purpose, amount, term, and your credit profile. Subject to credit approval. Conditions and limitations apply. Advertised rates and terms are subject to change without notice. Payment example: Monthly payments for a $10,000 loan at 4.5% APR with a term of 4 years would result in 48 monthly payments of $228.03.

Final Steps

Click **Explore More** > **Continue Deal Online**

1. Quick Credit App
   Confirm payment estimate with a credit app

2. Add Trade-In
   Add the value of a trade-in to your payment calculator

3. Schedule Delivery or Pickup
   Choose a date and time range

Depending on your dealership's settings, customers can choose to:

- Reserve a Vehicle or
- Request Test Drive

powered by ONLINE SHOPPER

Reserve Vehicle

This vehicle is currently available to other shoppers, so if you're starting to get serious about it just let us know and we'll hold it for you for 48 hours!

Who You Are

Brooks | Meyer

Contact Information

Email | (708) 743-6625

Comments

Add additional comments

55 characters

RESERVE VEHICLE

By clicking here, you authorize HONDA DEMO and its sellers/partners to contact you by texts/calls which may include marketing and be by autodialer. Calls may be pre-recorded. You also agree to our Terms of Use and Privacy Statement. Consent is not required to purchase goods/services. Terms of Use and Privacy Statement

powered by ONLINE SHOPPER

Request Test Drive

The best way to choose the vehicle that's right for you is to get behind the wheel yourself.

Who Are You

Brooks | Meyer

Preferred Contact Method
◉ Phone ○ Email
(708) 743-6625

Request an Appointment
Pick a Date | Pick a Time

REQUEST TEST DRIVE

By clicking here, you authorize HONDA DEMO and its sellers/partners to contact you by texts/calls which may include marketing and be by autodialer. Calls may be pre-recorded. You also agree to our Terms of Use and Privacy Statement. Consent is not required to purchase goods/services. Terms of Use and Privacy Statement

Meet Joe! Joe is a dealer at DI Motors and has an Automatic login for his dealership. In Automatic, he can access a garage made by customers like Brooks. He can work the deal and engage the shopper along the path to purchase.

To log in to Automatic, visit:

https://automatic.dealerinspire.com

If you've already been added as a user, your login will be your email address, and you can enter your password in the field below.

If you forgot your password, click **"Forgot your Password"**, and you will receive a notification email to reset it.

If you have not been enrolled as a user, email **onlineshoppersupport@dealerinspire.com** so our team can create an account for you.

Once created, Online Shopper will email you to activate your account.

Welcome to Automatic

Sign in to create and foster relationships with customers and win new business

AUTOMATIC

Email

Password

Forgot your password?

Sign In

NEW Single Sign On ✕
Automatic has now integrated SSO (Single Sign On) with CARS! You may now login using the same credentials used on many other products from Dealer Inspire, DealerRater, and CARS. If this is your first time, then you'll need to click "Forgot your password?" above and follow the instructions emailed to you to setup a new password.

2021-07-27

Sign in with Ford   *Ford*

Automatic does offer Single Sign On

Best Practice

Bookmark the URL! ☆

... to easily navigate back each time you log on!

Joe has successfully logged in to Automatic! 🎉

Before he can start viewing deals, he will need to select a specific dealership for whose deals he wants to view!

Once logged in to Automatic, if you are a user for multiple dealerships within your auto group, it will default to the first, alphabetically.

If this is the case, you will need to select a dealership before viewing any deals.

To select a dealership:
1.   Click the Dealership Name in the top right of your screen
2.   Search for or scroll to find the Dealership for whose deals you would like to view
3.   Select a Dealership

Once a dealership is selected, you will have the option to select **Deals,** or **Conversations.** If Conversations is not clickable, please email sales@dealerinspire.com to get this feature turned on.

Note: If you are only associated with one dealership, your deals will populate on the screen as soon as you login and this step will not be necessary.

If your screen is reduced in size, you will only see the icons on the left rather than the words.

Deals Screen
Deals Main Screen

Your default view should be the **Deals** screen. Deals allows you to see the most recently updated garages along with ways to communicate directly with the client.

On this screen you will see the following:

1. Customer First and Last Name

2. Unassigned or Assigned to a dealer

3. Add a Trade In

4. Activity and Frequency of use

5. Connecting with Customers via Text

6. Quick Actions

Additionally, you will be able to:

- Sort by Newest or Oldest (left)

- Filter by specs, like *Has Trade In* or *Unassigned* (above)

- Search for a customer by Name or Contact (above)

- Add a Deal or Clear All Filters (above)

Deals Screen
Deals Main Screen

Let's take a look at a few other details on the **Deals** screen.

1. Photo
- One means there is only one vehicle in the customer's garage
- Multiple boxes mean there are multiple vehicles in the garage
- Shows how many people have this vehicle in their garage
- Click the photo to enter the customer's garage

2. Customer Information
- First and Last Name
- Deal Assignee (will say *Unassigned* if it has not been assigned)

3. Trade
- Will display the title of the vehicle the shopper is trading in, along with the estimated pay range for the trade

- It will say *"No Trade Added"* if there is no information

Deals Screen
Deals Main Screen

4. Activity
- When the garage was created
- Recent Activity (by customer or dealer)

5. Connecting with Customers in the Garage
- Click here to send a text directly to the shopper
- Your texting thread will display here so you can read the history at any time

6. Actions*
- Quick Look
- Go to Garage
- Assign to Me
- Garage Link
- Unassign (where applicable)

🤝 Deals ⌃

C⋅ Conversations

Best Practice

Remember! If the shopper is in the garage now, they will be easy to re-engage.

If you are following up on a month old deal, consider the best way to start that conversation

(Ex: Are you still shopping for the perfect vehicle?)

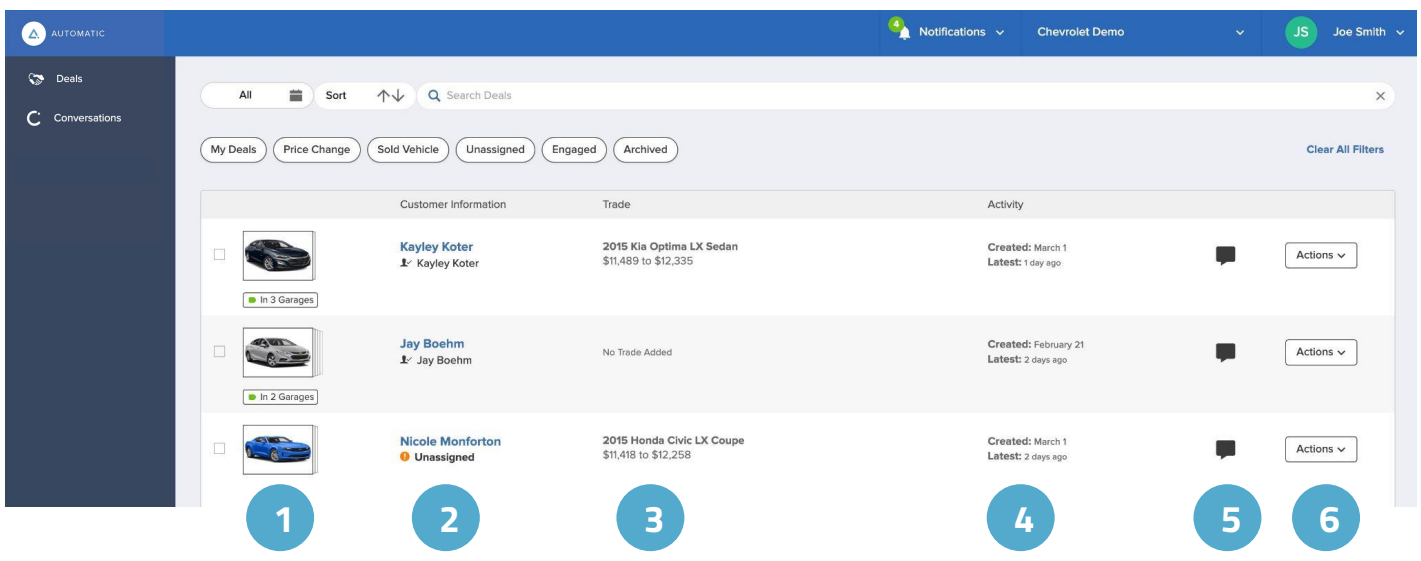|	Customer Information	Trade	Activity		
	Kayley Koter 👤 Kayley Koter ● In 3 Garages	2015 Kia Optima LX Sedan $11,489 to $12,335	**Created:** March 1 **Latest:** 1 day ago	💬	Actions ⌄
	Jay Boehm 👤 Jay Boehm ● In 2 Garages	No Trade Added	**Created:** February 21 **Latest:** 2 days ago	💬	Actions ⌄
	Nicole Monforton ⚠ Unassigned	2015 Honda Civic LX Coupe $11,418 to $12,258	**Created:** March 1 **Latest:** 2 days ago	💬	Actions ⌄

AUTOMATIC — 🔔 4 Notifications ⌄   Chevrolet Demo ⌄   JS Joe Smith ⌄

Deals | Conversations

All 📅 | Sort ↑↓ | 🔍 Search Deals ✕

My Deals | Price Change | Sold Vehicle | Unassigned | Engaged | Archived   Clear All Filters

1   2   3   4   5   6

AUTOMATIC

Actions

1. **Quick Look** will open up an overview of that customer's garage. In Quick Look, you can see:
   a. Activity: A brief summary of activity and source of lead.
   b. Garage: An overview of their garage including their trade in (if applicable)
   c. Customer Information: The customer's email, phone number, and location

2. **Go to Garage** will take you directly into the customer's Garage to be able to add new vehicles and/or work the deal

3. **Assign to Me** will quickly assign the Deal to you

4. **Garage Link** will copy the Garage Link to send to a customer. This link will take a customer right into their garage, even on their cell phone

If the deal is already assigned, you can select the fifth option:

5. Unassign

You will receive a banner notifying you that the unassign was successful if you choose this option.

Brooks Kinsley

Activity

Created	Latest
September 21, 2023	1 Day Ago

Lead Source
Online Shopper

Garage

Customer Information

Actions

1 Quick Look
2 Go to Garage
3 Assign to Me
4 Garage Link
5 Unassign

Unassignment Successful

Assigning a Deal

Assigning to Yourself
1. Choose Actions on the desired row

2. Click **Assign to Me**

Actions ^

Quick Look

Go to Garage

Assign to Me

Garage Link

Deals ^

Conversations

Assign to Users*
1. Check the box to the left of the deal

   (note that you can select multiple deals at once)

2. Click **Assign User** in the bottom panel that appears

3. Select the teammate you'd like to pass the deal to

Users listed as Managers are the only role that can assign leads to other users

In 3 Garages

Assign User

In 2 Garages

Unassign

Search Users

Ryan Altier

Jay Anderson

JD Anderson

Ron Andrews

Ryan Bell

Jim Bell

Once a user is assigned, whether it be to yourself or another user:

- The name will populate under the customer name

- You will see a notification in the top right corner that the assignment was successful

Customer Information

Ryan Kwasneski
Joe Smith

Assignment Successful

Conversations

Conversations is DI's messaging chat tool integrated into Automatic, connecting shoppers with dealers to make a seamless digital retailing experience.

Dealer View

My Chats and Active Chats

Shows your active chat(s) and current chat conversations with shoppers from other agents or the call center.

A shopper can initiate a chat with the dealership by selecting **Live Chat** when creating their garage.

If this option is not available to the shopper, they can use your third party chat tool in the corner of your website. The Live Chat feature is DI's Conversation tool integrated in the customer's garage.

Customer View

Conversations Screen
Conversations Main Screen

Conversations

With Conversations, you can accept an incoming chat and enable desktop notifications so you never miss a conversation!

Dealer View

Incoming Conversation

1. When you're in Automatic, you'll receive a pop-up window giving you the option to Accept or Decline the chat.

   If you aren't receiving the Incoming Conversation window, check your chat status is green and set to online.

Desktop Notifications

a. If in another tab, enabling desktop notifications will ping a notification in the top right, prompting you to return to Automatic to accept the chat.

b. Enable audio by toggling the bottom button. You'll hear a *ding* when a chat comes through.

Conversations Screen
Conversations

AUTOMATIC

This is how Conversations appears for a dealer in Automatic, and for a shopper on the dealership's website. The conversation occupies most of the screen, and for shoppers, the chat window is located to the left of their garage.

1 **Dealer View**

2 **Customer View**

Automatic
1. Let's take a deeper look at the Automatic or Dealer-facing side of accepting and communicating via our chat tool, Conversations.

Online Shopper
2. A shopper can initiate a live chat with dealer by selecting **Live Chat** when in their garage.

With Conversations, you can utilize a few features within the chat window to engage with your shopper and help get one step closer to closing the deal. Let's start by looking at what you'll find on the right-side panel of the Conversations screen.

Deals

Conversations

Visitor Information

1. **First Name**

2. **Last Name**

3. **Contact Information**, like phone and/or email address

4. **CRM Notes**

Once at least **3** details are included in the Visitor Information panel:

- First name

- Last name

- Phone **or** Email

you'll have the option to select a department, and save the details to your dealership's CRM.

Visitor Information

1 First Name

2 Last Name

Phone

3 Email

4 CRM Notes

Sales

Service

Save to CRM

Best Practice

Use the CRM Notes box to add contact details or information about your chat conversation that would be helpful to tie to the contact in your CRM system.

Garage

As the dealer in Automatic, you'll have quick access to the shopper's garage on the right-hand panel of the Conversations screen.

You'll be able to see the vehicles the shopper has shown interest in. For example in the image (right), you can gather that the shopper:

- Is interested in a Malibu

- Looking for a new vehicle

- White has color preference but could be open to options

- Most interested in a sedan at the least

Best Practice

With this intel, you can add similar vehicles to their garage for them or get a conversation going by discussing what they are looking for and how you can help.

Deals ⌃

Conversations

Garage ⌃

🚗 Vehicles   ⟲ Add Trade In

4 Vehicles

New 2024 Chevrolet Malibu LS Front ...
1G1ZB5ST0RF111933
$440.74 / monthly finance

New 2024 Chevrolet Malibu LS Front ...
1G1ZB5ST6RF107627
$423.58 / monthly finance

New 2024 Chevrolet Malibu LS Front ...
1G1ZB5ST2RF107592
$434.30 / monthly finance

Pre-Owned 2022 Chevrolet Malibu RS...
1G1ZG5ST2NF101870
$392.47 / monthly finance

Conversations Screen Conversations

Dealership Information

Below the Garage on the right-hand side of Conversations, dealers or Call Center agents will have a quick-look view of helpful Dealership Information to assist when shoppers have questions about hours or location.

Dealership Information includes:

- Hours per Department

- Your local time

- Website URL

- Address of dealership

- Map

Deals	∧
C· Conversations	

Dealership Information ∧

Training Sandbox

Sales Team Hours
Mon-Sat: 8:00am - 5:30pm

Service Team Hours
Mon-Fri: 9:00am - 5:00pm

Local Time: 10:06 AM

trainingsandbox.dealerinspire.com/

Dealership Notes

Dealership Notes is most helpful for call center agents, for the dealership to leave important notes regarding how you want chats managed.

Dealership Notes ∧

No Notes Available

For example, promoting specials or when to transfer to a dealer agent.

Below the chat screen in Conversations, dealers will see the message box and other unique features to help connect with shoppers effectively. You can engage with your shoppers in more ways than one. Let's take a look at the options below:

1. **Add Garage Link ➜** The garage icon generates the shopper's garage link into the text message field. Get them back into their garage through a chat to re-engage the shopper.

2. **Use Hotkeys ➜** Templated messages used to quickly respond to a chat.

3. **Attach Files ➜** Attach a file from your computer, for example a photo or a video.

4. **Transfer Chat ➜** Transfer a chat from your team to another department, like Service.

5. **Translate Chat ➜** Dealers and shoppers can communicate effectively even when speaking different languages!

Note the following:

    a.   Attached files and the Garage Link will appear below the text

    b.   Clicking the emoji icon, the list of emojis will appear in a window at the top right

When you are ready to send your message, click **Send**.

Conversations Tab
Conversations

On the previous page you saw the Attaching Files and Adding Garage Link features in action. Let's go into a little more detail on using Hotkeys, Translate, and Transfer options.

Hotkeys

Hotkeys are templated messages used to ensure quick response-time and professional, fool-proof starters.

Start by typing **/available**, for example, in the text box. The message will populate in the box!

General	Greetings	Sales	Service	✕
Awesome! That vehicle is available. Are you available to stop in?			/available	
Hello, I'm Lisa Jarvis and I'm here to help you today.			/hi	

Click the Lightning icon to see the library of messages populate in a window above the text box.

If you already know the hotkey you'd like to use, you don't have to click the icon first. Type out the hotkey, like **/hi**, to send your message!

Transfer

The transfer option allows you to send a chat to another department. The new chat will appear to the available agents to accept. Once accepted, you, the new agent, and the customer will be in the chat. If you close the chat on your end, it will continue for the customer and the new agent.

Transfer Conversation

Team

Select team ▾

Reason for transfer

Question about Tire Rotation Services

38/164 characters

Cancel   Transfer

Select team
● Reviews
● Sales
● Service

1. Select the correct Team to receive the chat

2. Add a Note for context

3. Click Transfer

If agents are available, you'll see a ● green dot next to the department.

If agents are not, you'll see ●.

Translate

Dealers and shoppers can communicate effectively even when speaking different languages!

Let's say a shopper chats

> Guten Morgen! Ich suche ein neues Auto. Was für EVs haben Sie?

Use the Translate button:

1. Select language detected

2. Click Translate

Translate Chat

Select a language

Cancel   TRANSLATE

→

Translate Chat

Select a language

German – (100%)

Cancel   TRANSLATE

This will translate the shopper's original message into a language for you to interpret, say in English. Then, will translate your message response that you write out in English, back to German (in this example), or to the receiver's language.

You can also hover your cursor over the translated text to see the original.

Guten Morgen! Ich suche ein neues Auto. Was für EVs haben Sie?

Good morning! I'm looking for a new car. What kind of EVs do you have?

AUTOMATIC

Joe wants to customize what he sees on the Deals screen so he only gets information most relevant to him. By customizing his view, he can set up different views for different occasions!

You have the ability to customize what you see on the Deals, or Main Screen.

The Deals Screen will default to show:
- Vehicle Image
- Customer Information
- Trade
- Activity

If you do not need to see all of this information, you can customize your view by scrolling down and clicking Customize My View in the bottom, left-hand corner of the screen.

⚙ Customize My View

Options ✕
☑ Vehicle ⠿
☑ Customer Information ⠿
☑ Trade ⠿
☑ Activity ⠿

Save Options

View Options

⚙ Customize My View

Deals Customization

Home Screen Navigation Customize My View

Options ✕

- ☑ Vehicle ⣿
- ☐ Trade ⣿
- ☑ Customer Information ⣿ 🖐
- ☑ Activity ⣿

Save Options

View Options

Deals Customization

You can rearrange the order in which the items appear on your screen by clicking six dots to the right and dragging the item into a new location.

Uncheck the box for any details that you do not wish to see. This will get removed from the screen.

The Home Screen will update in real time and customize which details appear.

If you'd like this to be a permanent view
1. Click **Save Options**
2. Create a name for this view in the Name field
3. Click **Save**

You will see a notification in the top right corner if saved successfully.

✅ Config "Standard View" saved successfully ✕

Save Options ✕

| Name |

☑ Also save search

Save

Back

Save Options

View Options ✕

- ⧉ No Trade View 🗑
- ⧉ *Standard View* 🗑

Delete All

Back

View Options

If you've created multiple list views you can select the one you want to see by clicking View Options.

As you create your unique list views, your list will appear here. And you can toggle between them in View Options.

Click the trash icon to delete a saved list view.

Joe needs to reach out to customers but doesn't want to flip back and forth from his phone to working the deal in Automatic. Not a problem! With Automatic's text feature, he can reach out to customers directly all without leaving the main screen!

Whether you are viewing all deals or are in someone's garage, you have the option to text customers within Automatic.

Click the **message icon** within the row of the customer that you'd like to contact.

☐ 🚗	**Nicole Monforton** ⚠ Unassigned	2015 Honda Civic LX Coupe $11,418 to $12,258	**Created:** March 1 **Latest:** 2 days ago	💬👆	Actions ∨

A window will populate on the right side showing a Text screen, allowing you to initiate a conversation with a shopper straight to their mobile phone, if their number is saved to their profile.

Note: If you do not have Conversations, you'll notice the Hotkey Lightning Icon will be grayed out and unclickable.

Brooks Kinsley   ✕
Text

Ana Bot 3:08 PM
Hi there. This is a message from Training Sandbox. Msg & data rates may apply. Reply STOP to stop all messages.

If you do have Conversations, you can also find the text conversation in **Active Chats** in the **Conversations** tab.

AUTOMATIC

	My Chats	Active Chats
🤝 Deals		
C Conversations		

Start typing your message...   😊

🏛 ⚡ 📁 🔤   Send

Home Screen Navigation Connecting via Text

Joe is looking to reach out to customers who have recently re-engaged with their garages. He knows that his customers are more likely to respond to text message, so he needs to learn more about how to engage customers via SMS through Automatic!

How to Send a Text

Clicking the message box by the customer's name. It will open up the Text window, where you can begin your new text thread.

- Click in the text box below to draft your first text message
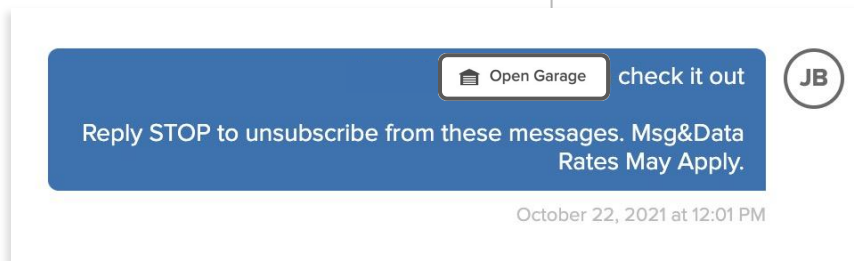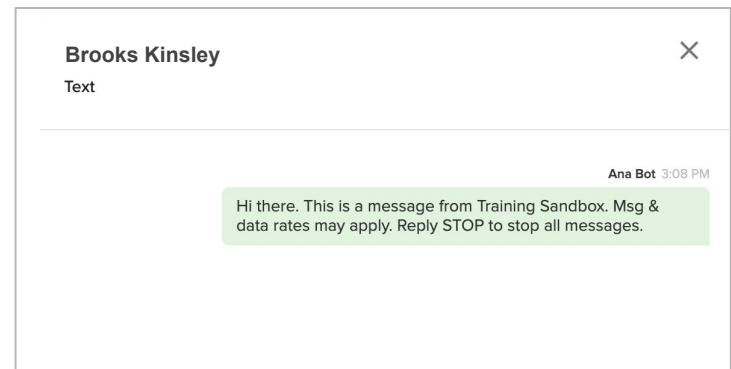- When you first greet your shopper, they will have the option to opt out of the text message conversation by replying STOP.

Brooks Kinsley
Text

Ana Bot 3:08 PM

Hi there. This is a message from Training Sandbox. Msg & data rates may apply. Reply STOP to stop all messages.

🏠 Open Garage | check it out | JB

Reply STOP to unsubscribe from these messages. Msg&Data Rates May Apply.

October 22, 2021 at 12:01 PM

Best Practice

Been a few days since recent activity?

Consider adding a new vehicle in that customer's garage. Then send a text with the garage link to get that shopper right back into the car buying process!

Start typing your message...

Send

This is a Conversations feature. If this icon is unclickable, please contact sales@dealerinspire.com.

In the Garage: Overview

Joe has access to view and edit a shopper's garage. This will help Joe efficiently update the customer's contact information, or even add inventory to their garage based on what their garage looks like!

The Online Shopper Garage and the Garage in Automatic are two different sides of the same coin. You'll notice that the same vehicles are in both garages. This allows for engagement and instant communication regarding the updates you make on the shoppers behalf.

There are three ways to enter a customer's garage:

1. Click on the **vehicle's image**
2. Click on the **customer's name** in Automatic
3. Click **Actions > Go to Garage**

Once you've entered the garage, you will have access to a summary of the customer:

- First/Last Name
- Customer Information, which includes editable fields for:
    - Email
    - Phone Number
    - Address
- Vehicle Details, where applicable
- Credit score, where applicable

In the Garage: Overview

You can see vehicles, add a new vehicle and explore other details within the shopper's garage.

See the specific vehicles they have saved in their garage.

Click **+ Add Vehicle** to add a vehicle by VIN or Stock Number to the customer's garage.

Then select **Add**.

New 2022 Hyundai Kona N Line AWD

Stock #: 7H20580
Financing: $230.30 / monthly

Add Vehicle

| Stock # | OR | VIN |

Cancel   Add

+ Add Vehicle

Top Navigation in the Garage

💬 Share via Text	🖨 Print Deal	🏠 Share with Garage	💾 Save Edits
1	2	3	4

At the top right of the customer's garage, you'll see options to:

1. **Share via Text**
   Populates an Open Garage CTA in the text box to send to the shopper

2. **Print the Deal**
   Opens a list of the vehicle's deal in a new tab, breaking down relevant information for that specific deal.

   Note: if numbers 3 and 4 are grayed out (as shown above) it simply means no changes have been made yet.

3. **Share with Garage**

4. **Save Edits or Changes**

   Sharing with Garage or Saving Edits will notify the shopper of the changes you've made to their deal.

💬 **Best Practice**
If you notice a trend of vehicles that the customer is selecting, add another and send a Text with the Garage link to re-engage the shopper! Call their interest to the newest changes you've made!

Agent View: Adjusting the Deal

As an Agent, Joe can modify anything in the garage that your shopper also has access to edit, like contact information, or even adding vehicles. As mentioned on the page prior, Joe has the ability to add a vehicle in the customer's garage based on their interests.

Adjusting the deals means you can change details within a vehicle in the garage.

Adjust:

- From Finance, Lease, or Cash
- Preset Term Length
  24, 36, 48 months, for example
- Down Payment
- Bank Rate Offer
- Selling price*
- Upgrades
- Finance and Insurance
- Incentives

Certain details are adjustable by certain roles. For example, Selling Price is only editable by managers if Automatic Payment Calculations is toggled off, but we do not recommend adjusting this.

Important Note

Payment $381.08 / monthly

When these fields are adjusted, they will affect and update the final payment box.

Best Practice

Work the deal and re-engage the customer with any changes that you have made! This should be a collaborative experience!

Since Joe is a Manager in Automatic, Joe will have all the abilities that the Agent view has, plus more! As a Manager, Joe will have the power to toggle off Automatic Payment Calculation to work the deal in Manual Mode.

Only Managers have the ability to toggle back and forth between **Automatic Payment Calculation** and **Manual Mode**.

Managers can cross-reference against the desking tool to make each payment penny perfect.

To Customize the Deal as a Manager

1. Switch the toggle next to **Automatic Payment Calculations**

2. Select **Okay**

Automatic Payment Calculations

Turn off Automatic Payment Calculations if you prefer to use Manual. Payment Calculations and custom edit the payment information below.

Change to Manual Calculations

You're currently editing your shopper's live garage. Any unsaved changes will be lost.

Cancel   Okay

Down Payment

3. You will see the following fields show up below:

    a. Best Offer

    b. Trade-In

    c. Upgrades

    d. Finance & Insurance

    e. Taxes

    f. Incentives

    g. Fees

Best Offer	⌄
Trade-In	⌄
Upgrades	⌄
Finance & Insurance	⌄
Taxes	⌄
Incentives	⌄
Fees	⌄

Click the drop-down arrow next to each section to expand and customize as a Manager.

Manager View: Customizing the Deal

Best Offer
- Adjust the lender and the percentage value

Trade In
- Change the trade-in balance, trade-in allowance, and the cash difference

Upgrade
- Add new by clicking + Add Upgrade

- Add an upgrade by typing the name of the applicable accessory, and enter the price accordingly

Best Offer	^
Lender	**Value**
DI Motor Finance	2.5 %

Trade-In	^
Year	**Make**
2010	Toyota
Model	**Trim**
Prius	I
Odometer	**Condition**
200000 mi	Good
Estimated Value	**Trade-in Allowance**
$4,304.00	$ 0
Trade-in Balance	**Cash Difference**
$ 0	$ 0

Upgrades	+ Add Upgrade ^
Name	**Value**
Environmental Protection Package	$ 545 ✕

Note that if you are in Lease or Cash, it will change what you may be able to customize.

Manager View: Customizing the Deal

Finance & Insurance
- Add new by clicking + Add Product
- Adjust or add any finance or insurance options, like extended warranty, gap coverage, or service packages

Tax
- Taxes should not be adjusted and will pull in automatically based on the customer's zip code.
- Update Customer Information rather than updating the Tax field.

Incentives
- Add new by clicking + Add Incentive
- Give your incentive a name and value; *Example*: Recent Grad Incentive

Fees
- Add new by clicking + Add Fee

Finance & Insurance		+ Add Product ^
Name	Value	
	$ 0	×

Taxes		+ Add Tax ^
Name	Value	
Sales Tax @ 7.00%	$ 1303.97	×

Incentives		+ Add Incentive ^
Name	Value	
	$ 0	×

Fees		+ Add Fee ^
Name	Value	
Acquisition Fee	$ 695	×
First Monthly Payment	$ 230.3	×

- Fees associated with your dealership should automatically sync with Online Shopper already
- Make changes to an existing fee

Note that if you are in Lease or Cash, it will change what you may be able to customize.
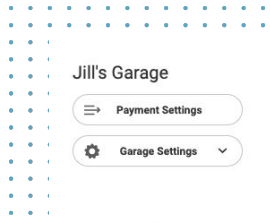
Don't Forget

 Share with Garage

 Save Edits

- When making manual edits, save your changes by clicking **Save Edits/Share with Garage**
- This will push the custom offer directly to your shopper
- Also note: Sending a custom offer locks the shopper out of editing that vehicle within their garage. They will see a CTA that says **View My Custom Offer**

If you toggle back to the Automatic Payment Calculations:

- It will revert back to the original, default numbers
- The customer will then be able to adjust the fields on their end

 How-To Summary

1. Switch off Automatic Payment Calculations
2. Make adjustments to the deal
3. Click Save Edits
4. Reach out to shopper!

 Best Practice

Next month's incentives populate automatically on unlocked garages - not on custom offers.

We recommend working with your team to set a time, like the end of the month, to go through and unlock those custom offers.

Creating a Customer & Garage

Joe just got a call from a customer interested in buying a vehicle. Joe can capture the lead in Automatic by creating a customer and even create a garage for that customer. This way, he can share the garage information with the customer and work collaboratively with them in selecting the vehicle that is right for them!

To Create a Customer and a Garage

1. Click **Add Deal**
2. Fill out the Customer Information
3. Click **Save**

The following fields are **required**:
- a. First Name
- b. Last Name
- c. Email or
- d. Phone
- e. Zip Code

You may also choose to fill out:
- f. Country
- g. Street
- h. City
- i. State

Create Deal

Personal Information
Tell us about your customer.

First
Brooks

Email
bkinsley@dealerinspire.com

Last
Kinsley

Phone
(___) ___-____

Country
USA

Street

The zip code is required and very important for estimating taxes and fees

City   State   Zip Code

Next, you have the option to add a vehicle directly to the shopper's garage by adding a:

4. Stock Number or
5. VIN
6. Click Save

Vehicle of Interest
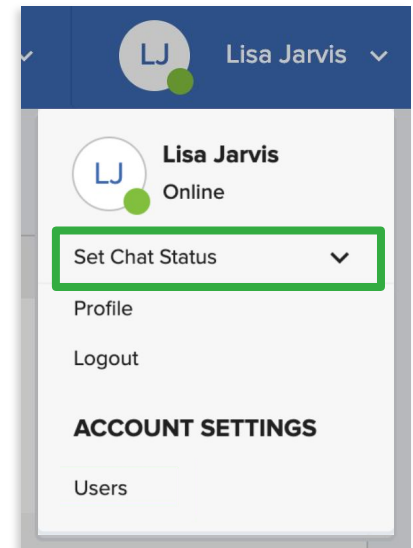
Optional: enter a stock or VIN number to add a vehicle of interest to this customer's garage.

Stock #   VIN

Save

Account Name

As a dealer, you may want to review that your profile information is accurate. Navigate to your Name and access your Profile to adjust chat status, profile settings, and more.

Setting Your Chat Status

1. Click your name in the top right-hand corner of the screen
2. Select **Set Chat Status**
3. Set your status to **Active** or **Do Not Disturb**

If you have Conversations within Automatic, you'll see either a ● green or ● red dot associated with your account name at the top right of your screen.
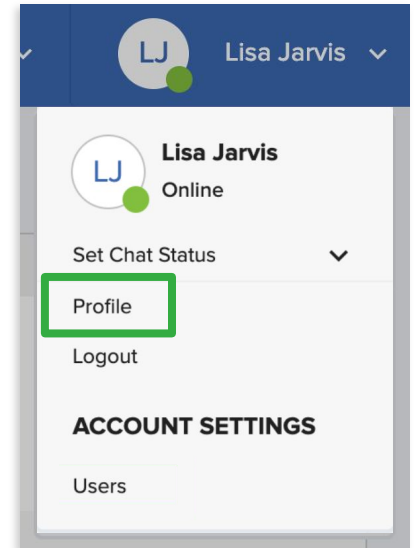
This is your chat status signifying if you are **Active**, or available to accept new chats that come through, or set to **Do Not Disturb**, where chats will not come through, and will instead ping an active team member.

To Update Your Profile

1. Click your name in the top right-hand corner of the screen
2. Choose Profile
3. Update:
   a. Profile Picture
   b. First and Last Name
   c. Role
   d. Timezone
   e. Assigned Teams and Dealerships
4. Save your changes

Email addresses can be updated through Support by emailing onlineshoppersupport@dealerinspire.com.

You can also choose to logout by clicking Logout.

Profile Image

Choose image

🗑 Remove

First
Lisa

Last
Jarvis

Email
ljarvis@dealerinspire.com

Role
Manager

Time Zone
America/Chicago

Assigned Teams

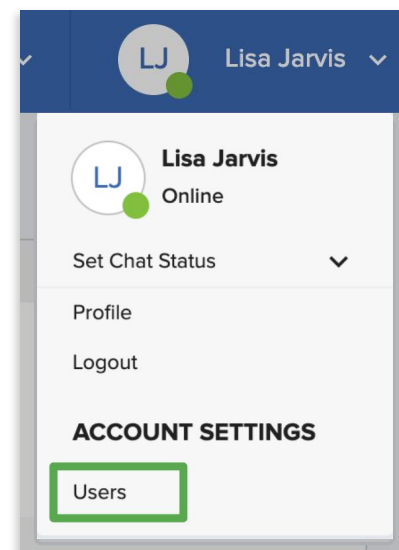| Dealership	Team	
Chevrolet Demo	Assign Teams	⊗
DI Training Sandbox	Reviews, Sales, Service	⊗
Ford Demo	Assign Teams	⊗
Toyota Demo	Assign Teams	⊗
Volvo Demo	Assign Teams	⊗

+ Add Dealership

Account Settings:
Adding Users

Joe recently hired some new employees to his dealership. He needs to create new users to be able to work the leads that are coming in to Automatic.

LJ Lisa Jarvis ∨

LJ **Lisa Jarvis**
Online

Set Chat Status ∨

Profile

Logout

ACCOUNT SETTINGS

Users

To Add a New User:

1. Click on your **name** in the top right corner of the screen

2. Click **Users**

3. Click **Add User**

4. Fill out the appropriate information (First/Last Name, Email, Dealership, and Role)

5. Click **Save**

Add User

First

Last

Email

Voice Number

(___) ___-____ ⓘ

Text Number

(___) ___-____ ⓘ

Personal Mobile

(___) ___-____ ⓘ

Dealership   Role

Assign a Dealership ▾   Assign a Role ▾ ⊗

+ Add Dealership

Cancel   Save

Add User ▲

Upload CSV

Anderson   Jay   Admin, Toyota Demo iGroup Admin, YWCA Demo

Upload CSV

Drop file here or click to upload

Dealership

Assign a dealership ▾

Cancel   Add Users

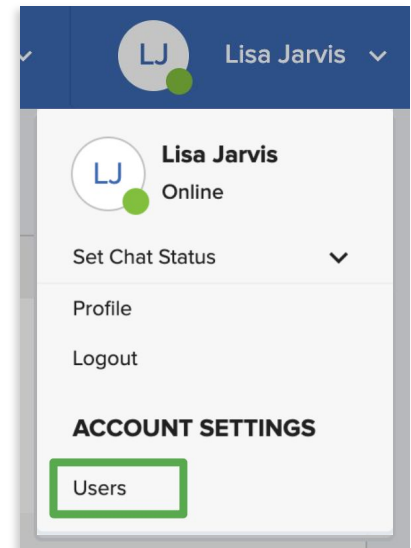Note that you can choose the drop-down arrow to Upload a CSV

Account Settings: Adding Users

User Roles

- User roles are selected when a user is created

- Regardless of role type, users can see deals in Automatic

- The user role determines which deals they can view, and what additional capabilities they have in Automatic

- Users can create new roles that are at an equal or lesser level

Managers can make another Manager or Agent, but an Agent cannot make a Manager.

Lisa Jarvis ⌄

LJ **Lisa Jarvis**
Online

Set Chat Status ⌄

Profile

Logout

ACCOUNT SETTINGS

Users

	PreQual User	Agent	Manager
Viewing Deals in Automatic	✓	✓	✓
Click into Credit Applications	✓	✓	✓
Add New Users		✓	✓
Connect with Customers		✓	✓
Assign / Unassign Yourself a Deal		✓	✓
Assign /Unassign Deals to Others			✓
Automatic Payment Calculations			✓
Manual Override Features			✓

CONGRATULATIONS! ✨

Joe has all he needs to understand the customer journey through Online Shopper!

He can also work the deal by logging into Automatic. He knows how to customize deals, create customers and garages, re-engage shoppers in the car buying process, and collaborate with customers!

LEARN MORE!

Learn about Modern Retail

Have Conversations and Online Shopper?

Check out our live workshop on Modern Retailing!

Register for it by clicking here

Learn about Prizm

Prizm is our proprietary reporting platform to give you all of your reporting in one easy to navigate system.

Check out our Prizm Training Guide, located in Training Camp

Reach a Coach

Have a question or looking for additional resources or training?

Reach out to a Coach!

Email us at trainers@dealerinspire.com