

# AccuTrade How To: Mark a Vehicle Disposition

## Vehicle Disposition

What is it?

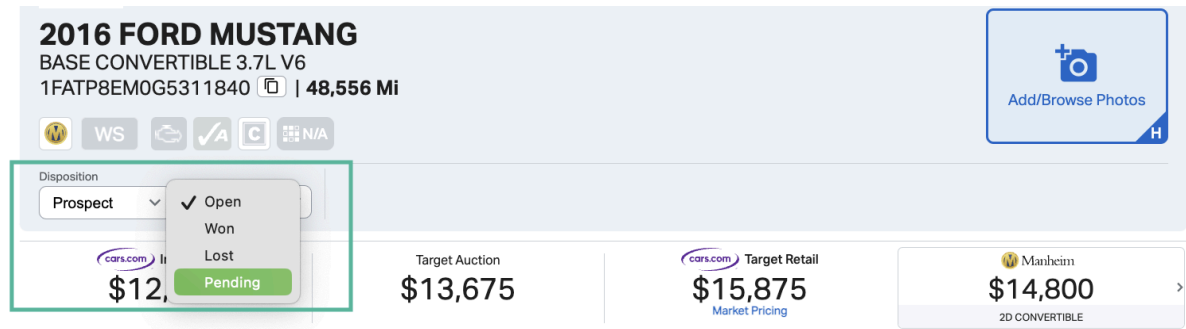
- Marking a vehicle's disposition helps you understand your vehicle acquisition performance. Keeping the dispositions up-to-date allows you to identify areas of opportunity as well as mimic processes for successful vehicle acquisitions.

Within this guide, learn the difference between:

- **Prospects: Open, Won, Lost, Pending** - The Appraisal was initiated by a customer looking to get an Instant Offer or is in for Service.
- **Acquisitions** - The Appraisal was initiated by a dealer to acquire a vehicle possibly from a consumer (driveway appraisal) or at auction with the intention of purchasing for their dealership.
- **Disposals** - The Appraisal was initiated by a dealer to check pricing. This might be used to compare prices between their IMS and AccuTrade.
- & Learn how to easily access Won, Lost, Open, or Pending opportunities 💰

### How to use it:

1. Under each appraisal, you'll see a disposition section which allows you to indicate the status of the vehicle.

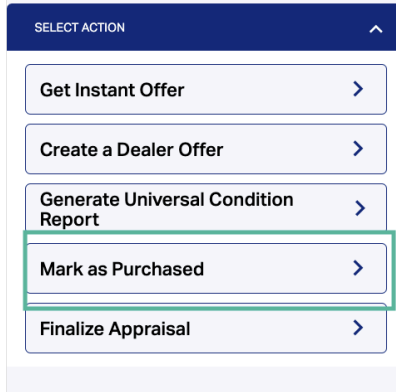


**2016 FORD MUSTANG**  
 BASE CONVERTIBLE 3.7L V6  
 1FATP8EM0G5311840 | 48,556 Mi


Disposition: Prospect (selected), **Open** (checked), Won, Lost, Pending

Target Auction: \$13,675 | Target Retail: \$15,875 | Manheim Market Pricing: \$14,800

- a. As an example, let's say this lead came in from the trade-in solution on a dealer's website. The dealer was going back and forth with the customer on finalizing the offer, so they set the status to Prospect - Pending.
2. The customer came in, and agreed to an Instant Offer number presented through the Universal Condition Report, and the dealer marked the vehicle as purchased - located under the "Actions" bar (bottom right in Desktop, bottom of Appraisal on Mobile).

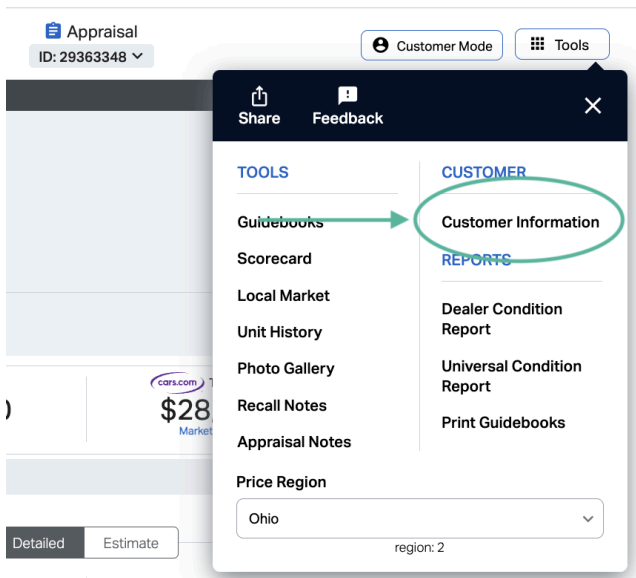


3. Marking a vehicle as purchased, will automatically set the Disposition to Prospect - Won and finalize the appraisal.

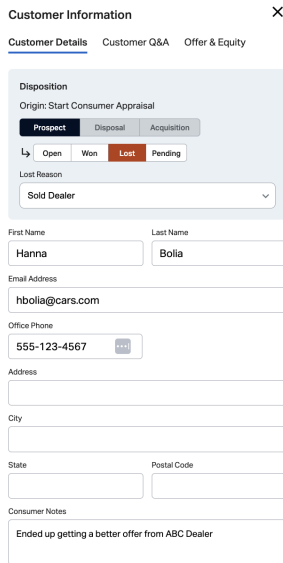
 *Tip: If you need to change the status changes, re-open the Appraisal and adjust the disposition to Lost or Pending as necessary.*

**Another way to Change or set the Disposition:**

1. Open the Appraisal Section within the dashboard and:
  - a. Start a New Appraisal
  - b. Select any Appraisal
  - c. OR select a Prospect and start Appraising it
2. Conduct your Appraisal as normal, make your Instant Offer, and finalize the sale with your customer
3. Let's say your customer ended up selling their vehicle to another dealership or they're not ready to trade-in their vehicle yet
4. Within the Appraisal, find Tools → Customer Information



- This will open up a prompt to update the Customer's Information, as well as insert any relevant information to the Lost or Pending reason. *This information automatically saves.*



**Customer Information** [Close]

Customer Details | Customer Q&A | Offer & Equity

Disposition  
 Origin: Start Consumer Appraisal

Prospect | Disposal | Acquisition

Open | Won | Lost | Pending

Lost Reason  
 Sold Dealer

First Name: Hanna | Last Name: Bolla

Email Address: hbola@cars.com

Office Phone: 555-123-4567


Address: [Empty]

City: [Empty]

State: [Empty] | Postal Code: [Empty]

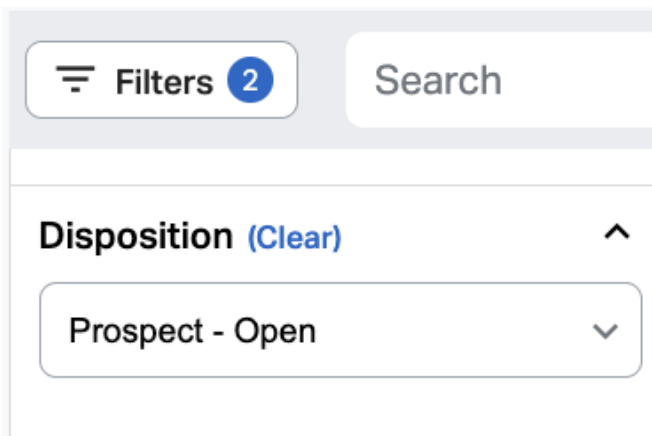
Consumer Notes  
 Ended up getting a better offer from ABC Dealer

- Follow the same process for marking a vehicle as Pending.

 *Tip: If you mark the vehicle as Pending use the guide below to understand how to follow up with these available opportunities.*

### Easily access Won, Lost, Open, or Pending opportunities:

- Open the Appraisal Section within the dashboard
- Click on “Filters” to open your filter options and find “Disposition”



Filters 2 | Search

Disposition (Clear) ^

Prospect - Open v

- Once selected, the Appraisal list will show you your selection

*Prospect - Open* = 💰 Your open opportunities

*Prospect - Won* = 😄 Your successful customer interactions that lead to vehicle acquisitions

*Prospect - Pending* = 💰 Open opportunities to follow up on

*Prospect - Lost* = You did not acquire this vehicle and it's still fair game! Follow up on these prospects to see if your customer still needs to sell their vehicle!

Note: Conqusted (lost to a dealer) are also included in the Lost category.

Disposition <

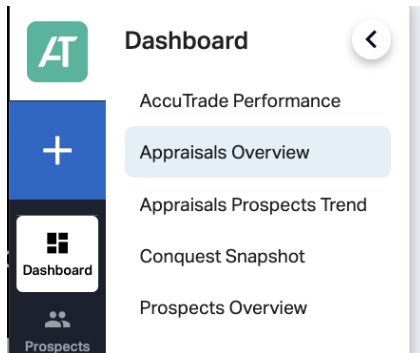
PROSPECT LOST

PROSPECT CONQUEST

### Another way to access opportunities:

Open the AccuTrade Dashboard

Find the right arrow > next to the AccuTrade logo and select it. Your available reports should appear.

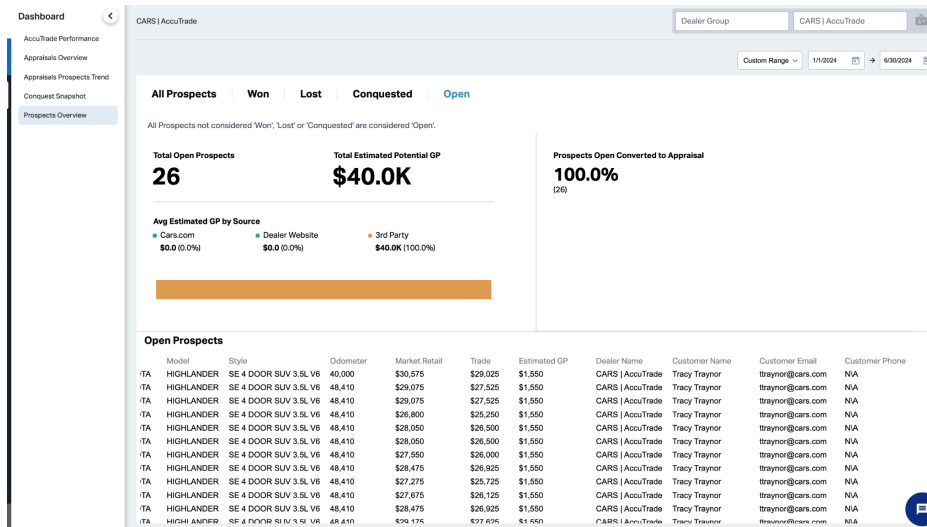


Dashboard <

- AccuTrade Performance
- Appraisals Overview
- Appraisals Prospects Trend
- Conquest Snapshot
- Prospects Overview

Both Appraisals Overview + Prospects Overview will include a report on: Won, Lost, Conqusted, Open

**TIP:** Your easiest opportunities will be listed under Prospects Open & Pending and include customer information for fast follow ups!



Dashboard < CARS | AccuTrade Dealer Group CARS | AccuTrade

Custom Range 1/1/2024 6/30/2024

All Prospects Won Lost Conqusted Open

All Prospects not considered 'Won', 'Lost' or 'Conqusted' are considered 'Open'.

Total Open Prospects: 26  
 Total Estimated Potential GP: \$40.0K  
 Prospects Open Converted to Appraisal: 100.0% (26)

Avg Estimated GP by Source

- Cars.com: \$0.0 (0.0%)
- Dealer Website: \$0.0 (0.0%)
- 3rd Party: \$40.0K (100.0%)

Model	Style	Odometer	Market Retail	Trade	Estimated GP	Dealer Name	Customer Name	Customer Email	Customer Phone
TA	HIGHLANDER SE 4 DOOR SUV 3.5L V6	40,000	\$30,575	\$26,025	\$1,550	CARS   AccuTrade	Tracy Traynor	traynor@cars.com	NA
TA	HIGHLANDER SE 4 DOOR SUV 3.5L V6	48,410	\$28,075	\$27,525	\$1,550	CARS   AccuTrade	Tracy Traynor	traynor@cars.com	NA
TA	HIGHLANDER SE 4 DOOR SUV 3.5L V6	48,410	\$29,075	\$27,525	\$1,550	CARS   AccuTrade	Tracy Traynor	traynor@cars.com	NA
TA	HIGHLANDER SE 4 DOOR SUV 3.5L V6	48,410	\$26,800	\$25,250	\$1,550	CARS   AccuTrade	Tracy Traynor	traynor@cars.com	NA
TA	HIGHLANDER SE 4 DOOR SUV 3.5L V6	48,410	\$28,050	\$26,500	\$1,550	CARS   AccuTrade	Tracy Traynor	traynor@cars.com	NA
TA	HIGHLANDER SE 4 DOOR SUV 3.5L V6	48,410	\$28,050	\$26,500	\$1,550	CARS   AccuTrade	Tracy Traynor	traynor@cars.com	NA
TA	HIGHLANDER SE 4 DOOR SUV 3.5L V6	48,410	\$27,550	\$26,000	\$1,550	CARS   AccuTrade	Tracy Traynor	traynor@cars.com	NA
TA	HIGHLANDER SE 4 DOOR SUV 3.5L V6	48,410	\$28,475	\$26,925	\$1,550	CARS   AccuTrade	Tracy Traynor	traynor@cars.com	NA
TA	HIGHLANDER SE 4 DOOR SUV 3.5L V6	48,410	\$27,275	\$25,725	\$1,550	CARS   AccuTrade	Tracy Traynor	traynor@cars.com	NA
TA	HIGHLANDER SE 4 DOOR SUV 3.5L V6	48,410	\$27,675	\$26,125	\$1,550	CARS   AccuTrade	Tracy Traynor	traynor@cars.com	NA
TA	HIGHLANDER SE 4 DOOR SUV 3.5L V6	48,410	\$28,475	\$26,925	\$1,550	CARS   AccuTrade	Tracy Traynor	traynor@cars.com	NA
TA	HIGHLANDER SE 4 DOOR SUV 3.5L V6	48,410	\$30,175	\$27,625	\$1,550	CARS   AccuTrade	Tracy Traynor	traynor@cars.com	NA

If you have any questions, please reach out to [support@accu-trade.com](mailto:support@accu-trade.com) or your dedicated DRM.