



Showroom Sales Management (ISM)

Letter Template Quick Start Guide

1 Add/Edit Letter Templates

Letter Templates automate and streamline the process of contacting prospects through printed correspondence. Each letter template establishes a standard or "form" message. To set up letter templates click the *Settings* tab from the navigation bar, then scroll to the *Add/Edit Letter Templates* link.

1. Click the *Add* button to display the *Create Letter Template* screen.

2. Type the name of the new template in the *Template* text box at the top of the window.

3. Use the down arrows in the list boxes under *Left*, *Right*, *Top*, and *Bottom* to select the page margins for the letter template.

4. Type the text of the letter in the text box. Use the tools along the top to edit and customize the template.

5. *Merge Codes* are available to automate the process of quickly customizing contact with prospects. To use a *Merge Code*, first position the cursor in the text of the letter template where the merge code is to be inserted. Then click the down arrow in the *Merge Codes* list box. A list will display the available *Merge Codes*. Use the scroll bar to locate the *Merge Code* then click the code. The selected *Merge Code* will be inserted into the text at the specified location. When a letter is generated using the template the *Merge Code* data will be entered in the letter as the letter is printed.

6. Select either *Dealershipwide* or *Private* as the scope of the template by clicking the corresponding radio button. If *Dealershipwide* is selected the letter template will be available to all users of the Showroom Sales Management tool. If *Private* is selected only manager's and the user that created the template will have access to the template.

7. Click the *Save* button to save the template.

2 Setup Envelopes

Envelope templates can be created to facilitate printing envelopes. To set up envelope templates click the *Settings* tab on the navigation bar, scroll to the *Letter Administration* section, then click the *Set Up Envelopes* link.

1. Click the *Add* button to display the *Envelope Template Set Up* screen.

2. Type the name of the new envelope template in the "Template" text box at the top of the window.

3. Select either *Dealershipwide* or *Private* as the scope of the template.

4. To include either *Address* on the envelope, click the check box corresponding to the *Include Address* option.

5. Click *Customize* to modify either *Address*.

Envelopes are customized using a window similar to letters, select margins for the *Addresses* using the list boxes. Enter the text of the address in the text box. Use *Merge Codes* to customize and personalize the envelope template. Click the *Save* button to save the envelope.

3 Mass Mailing

The *Mass Mail* feature prints a letter for a group of prospects. The group is selected based on criteria from the prospects' profile. To send a *Mass Mailing*, click the *Settings* tab on the navigation bar then select the *Mass Mailing* link. The link opens the *Mass Mailing Search Form* which is used to select prospects for the mailing. Enter criteria on the query form to select recipients of the *Mass Mailing*.

The query results are displayed on the *Search Results* screen. If the number of customers returned by the search is more than the number displayed per page, the additional pages of records can be viewed by clicking the page numbers or using the *Next* button. The prospects' names are linked to the *Customer Detail* window, click the name to view the details. To be included in the *Mass Mailing* the customer must have a check in the box at the beginning of the row. Customers can be checked and unchecked in groups by using the buttons along the top of the screen. Click the *Submit* button to display the *Mass Mailing* screen.

On the *Mass Mailing* screen either create a new letter as described in #1 or select a template from the list box for the mailing.

Select criteria from the list boxes to include or exclude customers.

To include customers based on *Date Created* or *Vehicle Purchase Date* click the corresponding check box, then enter the date range in

To select prospects based on *Vehicle*, *Residency*, or *Salesperson* Information, click the check box then use the list boxes to select criteria to limit the query.

Configure the search results by using the list boxes to select the number of results to display per page, the maximum number of results the search will return, and the recency which will exclude a prospect. Click *Submit* to process the search.

The screenshot shows the 'Mass Mailing Search Form' with several sections:

- General Information:** Includes 'Sales Cycle' (Is) and 'Source' (ADVCO Direct Mailer, ashlery, Autobytel.com, AutoTrader).
- Prospect Type:** Includes a dropdown and checkboxes for 'Prospect Created Between' (05/31/2003 and 08/29/2003) and 'Vehicle Purchased Between' (07/29/2003 and 08/29/2003).
- Vehicle Information:** Includes a checkbox for 'Vehicle Information', 'Year' (1973-1977), 'Make', and 'Model'.
- Prospect Information:** Includes a checkbox for 'Residency Information', 'City', 'State', and 'Postal Code'.
- Sales Person:** Includes a dropdown for 'Sales Person' (All Users for AVV Mazda BDC, BDC ABTS, One Manager, Manager Standard).
- Results per page:** Set to 10.
- Max Records Returned:** Set to 1000.
- Exclude Recent Recipients:** Set to 2 Weeks.

 A 'Submit' button is at the bottom.

Click *Submit* to continue.

Click the customer's name to view the detail window.

The screenshot shows the 'Search Results' screen with a table of results. Callouts point to the 'Submit' button and a customer's name in the table.

Name	Vehicle	Action	Source	Status	Sales Rep
<input checked="" type="checkbox"/> Douglas Flores	2002 Chrysler Concorde		Autobytel.com	UNK	Two, M
<input checked="" type="checkbox"/> Patricia Ford	2002 Pontiac Grand AM		CarsDirect.com	Bought Elsewhere	Two, M

Only customers with checked records will receive the mailing. Use the *Check/Uncheck* buttons to select records.

4 Label Maker

The *Label Maker* function prints mailing labels using Avery labels. The print labels system works with Microsoft Word or Works to control the print functions. To print labels click the *Label Maker* link on the *Settings* screen. This link will open the mailing label query form. Enter criteria to search for the customers for which labels will be printed as shown above in #3.

Click the *Submit* on the query form to view a report which shows the labels that will not be generated because of problems with the customer's address data and those that will generate labels.

On the query form click the down arrow in the *Mailing Label* list box to display the list of Avery label product numbers. Click the type of label from the list to select it.

Click the *Generate Labels* button to display the labels that will print. Print the labels by clicking the print icon, selecting print command on the file menu, or by typing Control (Ctrl) + "P" on the keyboard.

The screenshot shows a dropdown list of Avery label product numbers. The list includes:

- Avery 5161
- Avery 5162
- Avery 5163
- Avery 5164
- Avery 5165
- Avery 5167
- Avery 5168
- Avery 5196
- Avery 5197
- Avery 5199 FACE
- Avery 5199 SPINE
- Avery 11137

 A mouse cursor is pointing at 'Avery 5165'.