



# Internet Sales Management (ISM)

## Standard User Quick Start Guide

### 1 Log on to <https://webcontrol.avv.com>

### 2 View Your Leads

New leads and existing prospects which have sent new email will display in the *Prospects* listings section of the *Prospects* screen.

Name	Created	Make	Model	Action	Source
Cruz L	02/05/03 08:22 P	03 Ford	F-150		Ford Fast Q
Zamith S	02/05/03 08:19 P	03 Chevrole	Corvette		AAA New S.
Werhli C	02/05/03 08:16 P	03 Harley D	V-Rod		InvoiceDealer New S.
Santos L	02/05/03 08:11 P	03 Honda	Accord		GetAQuote New S. SalesMan

### Action Icons

### 3 Read Your Prospect's Details

**Prospect: Mrs. Clarice Serrano** [Close]

Name: Clarice Serrano      Email: cserrano@avv.com

Address: 939 Goodale Blvd.  
Columbus OH 43212      Vehicle: Honda Civic ; Undecided

Phone: Eve: (614) 487-1436      Trade In: [add Trade In]

ProspectID: 10011461      Type: Internet

Source: CarsColumbus      Dealership: AAA Sales Test Dealer

Purchase Window: 30 days      Status: New

\*Sales Rep: Sues SalesManager

Unsubscribe from broadcast:       In Store

In Dealership    Demo    FI

Action Buttons: Print, Print All, Send Email, Phone Call, Note, Letter, Exit Package, Edit, Merge, Delete, Open Actions, Organizer, Mark Unread, Credit Check, Inventory/Quote, Open All Notes, Forms

To open a lead click the prospect's name. The *Prospect Detail* window will open displaying prospect information. The original email lead can be viewed in the *New Note* record by clicking the plus "+" sign to expand the record. (For more information refer to #4) The action buttons are along the right margin of the window, click an action button to initiate the action. The prospect information is at the top of the window. The prospect information can be edited on the *Edit Prospect* screen, accessible by clicking the *Edit* action button. The option fields and note records are at the bottom of the prospect window. To modify an option field click the down arrow then make a selection from the list box. Only users with manager status will have the *Sales Rep* list box for transferring prospects from one sales rep to another.

## 4 Contact Your Prospect

There are multiple ways to respond to a new prospect. From within the *New Note*, buttons provide the option to *Delete*, *Forward*, *Respond* to, or *Print* the lead. Click a button to initiate the action. The *Respond* button will open an email template window including the text of the original message.

Notes Record

Type	Date/Time	Status	Sales Rep.
Note	2/07/03 3:45 PM	Status Change	S. SalesManager
Meeting	12/17/02 9:28 AM	[No Subject]	S. SalesManager
New Note	12/17/02 9:28 AM		

Click the plus "+" sign to expand a note record. The *New Note* contains the original email lead.

Click the *Respond* button from within the *New Note* to open an email template containing the prospect's return address and original message.

Buttons: New Note, Delete, Forward, Respond, Print

Email can be sent to the prospect by clicking the *Send Email* action button on the *Prospect Detail* window. There are also action buttons to facilitate prospect contact through *Phone Calls*, *Notes*, and *Letters*.

## 5 Schedule the Next Action

Each time an email is sent, a note added, a phone call recorded, or a letter printed from the *Prospect Detail* window using the action buttons a pop-up window will prompt you to schedule another action. Click OK to open the *Schedule an Action* window.

Schedule Next Action

Name: Mrs. Clarice Serrano  
 Eve Phone: N/A  
 Day Phone: (614) 487-1438  
 Address: 939 Goodale

Action:  Meeting  Phone Call  Email  
 Letter  Fax  Other

Assigned to: Sues SalesManager

Title: Test Drive  
 Date: February 5, 2005  
 Time: 03:30 PM  
 Reminder:  30 min(s) before.

General Notes: Prospect coming in to test drive 2003 Civic

Buttons: Save, Cancel

2. Type a *Title* and *Notes* important to the action in the text boxes provided.

3. Select a *Date/Time* for the action by clicking the down arrows to open the lists of options, click an option from the list to select it.

1. Choose the type of action by clicking the corresponding radio button.

4. Click the *Reminder* check box to schedule a pop-up reminder. Enter the unit and amount of time before the scheduled action that the *Reminder* should display.

5. Click "Save" to save and schedule the action. Close this window by clicking the "X". From the *Prospects* page continue with the next prospect.

## 6 Customize Your Pager Notification

To set pager notification to forward email received in your account, complete the form on the *Pagers* screen. On the *Settings* screen, scroll to the *Email Administration* section and click the *Add/Edit User's Personal Signatures* link.

1. Enter the pager email address in the *Enter Pager email address* text box.

2. Click the *Pager Type* drop down box arrow to display the pager options menu. Select the type of pager (Alphanumeric, Two-Way, or WIT) from the list.

3. Select the types of email to be forwarded by checking the check box for each type: *New Prospects*, *Existing Prospects with New Email*, and *Unmatched Email*.

Sue Smith User Maintenance - AAA Sales Test Dealer

Users Info Email Signature Pager

Pagers

Note: To enter an additional pager, clear the form and enter the new pager information.

Enter pager email address: ssmith@pagenetworkwireless.com

Pager type: Alpha-Numeric Pager

Email types to forward:  Existing Prospects with new Emails  New Prospects  Unmatched emails

Limit # of characters in message: All

Buttons: Select All, Clear All

Hours	Mon	Tue	Wed	Thu	Fri	Sat	Sun
7 AM - 12 PM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
12 PM - 5 PM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
5 PM - 10 PM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
10 PM - 7 AM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Buttons: Save, Delete, Clear Form

4. Enter the maximum number of characters to be sent in the *Limit # of characters in message* box.

5. Click the *Select All* button to forward email to the pager 24 hours a day 7 days a week. The *Clear All* button will delete all time frames selected.

6. To customize the times that email will be forwarded to the pager, click the corresponding time frame check boxes.

7. Click *Save* to update changes.