Axpert™ Solution for
Automotive Dealerships

AGILE LABS
making IT really simple

AGILE LABS
BANGALORE

**Sri Lakshmi Complex
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www.agile-labs.com

Business Features

Pre-Sales

- Setting up lost reasons, vehicle price, sales team, consumer schemes, events
- Managing leads, assigning leads to sales executives, lead follow-ups
- Requesting for demos to leads, tracking demo vehicles, capturing demo feedback
- Creating and maintaining proforma invoices
- Generating reports - lead list, follow-up list, lead lost analysis, demos, demo feedback analysis, model wise and sales executive wise conversion ratio

Sales

- Setting up likely purchase, vehicle exceptions, checklist for vehicle delivery and receipt
- Setting up branch and sales executive wise targets
- Booking sales orders
- Managing inventory through purchase orders, vehicle delivery receipts, vehicle goods receipt notes, vehicle returns, vehicle stock transfer within a branch
- Vehicle invoicing, vehicle delivery note
- Handing direct customers at OEM level
- Allotting/un-allotting vehicles
- Managing commission claims
- Generating reports on order booking, commission claim, vehicle receipt, vehicle history, event activity, stock transfer, retail target vs. achievement, stock status, sales, area wise sales, financier wise sales

Parts

- Setting up inventory classification, purchase order types, unit of measure, reasons, part categories, parts targets, kits, stores
- Managing parts at OEM and dealership levels
- Generating purchase orders, purchase returns
- Generating goods receipts notes for parts received from OEM and local vendors
- Claims related to parts
- Part requisition, issue and returns for workshops
- Parts sales - proforma invoice, customer orders, counter sales, counter sales return, delivery challan issue, delivery challan return, delivery challan bill
- Stock transfers - indents, issue between branches, issue between stores, receipts, bin to bin stock transfer
- Stock adjustments - increasing and decreasing
- Processing suggested order quantity
- Kitting and de-kitting
- Physical inventory
- Generating various reports on purchase order, receipt, issue, claim, counter sale tax, party wise counter sale, stock transfer status, stock summary, inventory analysis, stock transfer issue, stock adjustment, pending workshop requisition status, dead stock, profitability, part movement for last 3 months, workshop fill ratio, GRN variance, OEM purchase order status, non-dispatcheable warranty, stock-in-transit, suggested order quantity

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Service

- Setting up service types, mapping service types with model
- Configuring vehicle maintenance schedule and activity checklist
- Setting up aggregates, labor/job codes, flat rate manual, OEM labor rates, culprit, defect
- Maintaining recall campaigns, annual maintenance contracts, chassis monitoring
- Setting up claim types, warranty policy, free service policy, PDI checklist, reasons, billable types, revisits, cost heads
- Setting up dealer branch bays, labor rates, labor master, technician team, dealer AMC
- Registering campaigns and inviting customers
- Managing appointments
- Pre delivery inspections
- Creating and maintaining quotations
- Managing job orders, bill, repeat/revisit job analysis
- Recording product complaint reports
- Generating warranty and AMC claims, dispatching defective parts, receiving defective parts, miscellaneous claims
- Generating reports on service appointment status, service appointment hit rate, workshop status, workshop productivity, product complaints, service bill, warranty claims, same day delivery, technician service summary, revisit/repeat job orders, repeat job summary, estimate variance, delayed job orders, vehicle aging analysis, day wise workshop revenue, promised date time delay analysis, retention, vehicle service history, warranty

CRM

- Configuring follow-up settings, service schedule, feedback attributes, feedback questionnaire, vehicle performance feedback characteristics, customer concern category
- Generating and printing service reminder letters
- Managing post sales and service follow-ups
- Recording customer complaints
- Capturing customer feedback and lost customer feedback
- Capturing current vehicle performance feedback
- Generating greeting list, customer contact calendar, follow-up checklist, follow-up customer complaint status

Finance

- Configuring chart of accounts, currency, tax/charge types, document types, financial year, tax/charges, account category, tax/charge category, miscellaneous charges, mapping model and account
- Posting various receipts to finance automatically
- Managing exchange rates
- Processing receipt voucher, payment voucher, journal, debit note, credit note
- Generating reports on exchange rate history, ledger, voucher query, receivable/payable
- Integration of financial transactions with accounting packages

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Data Management

- Setting up geography - country, state, district, city/tehsil, PIN code, region, area, sub area
- Configuring dealer hierarchy - parent groups, branches, companies
- Configuring product hierarchy - product division, model group, model, model variant
- Setting up other information - corporate, plants, terms and conditions, competitors, financiers, insurance companies, vehicle application

HR

- Setting up departments, designations, employee skill
- Maintaining employee information
- Maintaining dealer holiday and employee leave calendars

Administrative Features

User Access Control Utility

Users will login to the system through browser application and on login, their various role definitions are enabled. Depending on the access rights, various modules and menus for accessing application are enabled or disabled. This will provide the first level of access control. The second level of access control is enabled by associating access permissions to various database operations like viewing, adding, editing and removing information.

Licensing

The portal administrator is allowed to define the licensing information of tenants which will drive the authentication and authorization of tenant users.

Workflow

Axpert's built-in workflow module is used to define/configure tenant specific the workflow forwarding, returning, approving and rejecting requests/applications. Delegation of pending activities from one user to another is possible.

Reporting

- Drilldown reports, Dial charts, Tabular and PDF.
- Export data into Excel, CSV, HTML and Text formats.

Data Integration

The data integration between a Tenant Application, such as SAP, and DMS is performed through SFTP. The application provides data required for the integration points in the form of CSV files.

Business Benefits

The primary benefit of this portal is, across all dealers of an OEM in an Automobile Industry, a standard operation and application systems between sales and service outlet is implemented resulting in better customer satisfaction.

Other benefits are as follows:

- To be able to monitor business transactions by sales & service dealers
- To have a centralized system that captures customer, vehicle & inventory

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information

- ♦ To improve parts, accessories and save the inventory cost
- ♦ To integrate dealer inventory system with OEM back end support systems
- ♦ To be able to access application via internet from anywhere
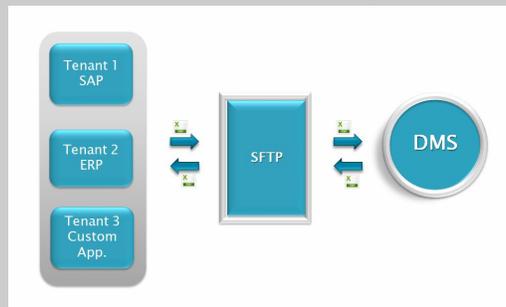
Admin

Includes the registration process of Tenant, the Dealers and the associated users who are authorized to access the application. Billing is based on the registration.

Architecture (Multi-Tenant)

DMS portal is a multi tenant application on cloud enabling tenant specific branding, workflow, extensions to data model, access control, business rules and reporting.
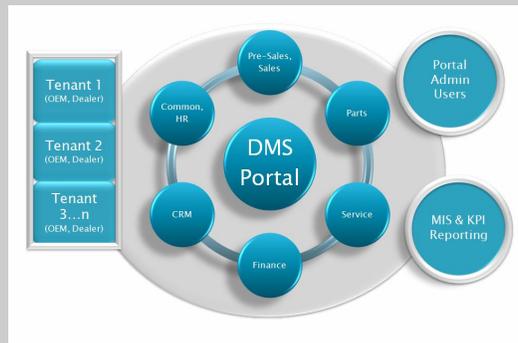
Technology

The application is built on Service Oriented Architecture (SOA) using Axpert.net and Axpert Web Services.

- ♦ Axpert.net
- ♦ Axpert Web Services (AWS)
- ♦ Microsoft.Net Framework, ASP.Net, C#, VB.Net
- ♦ Microsoft SQL Server 2008 R2
- ♦ Microsoft Windows Server 2008 R2
- ♦ Microsoft Office 2007, Fast Help
- ♦ Microsoft Projects 2010
- ♦ JavaScript, JSON, CSS, HTML
- ♦ XML, Delphi