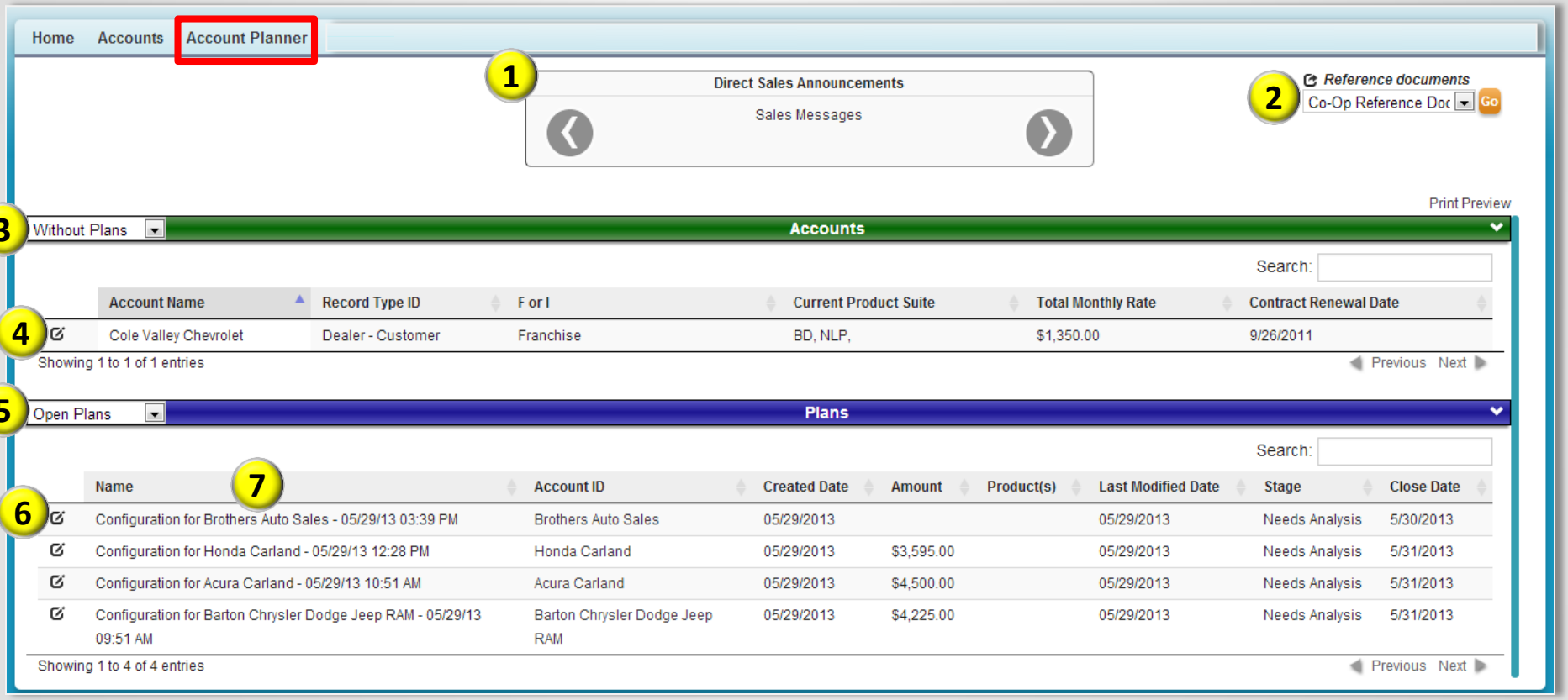
Sales User Guide

Updated: 2/4/14

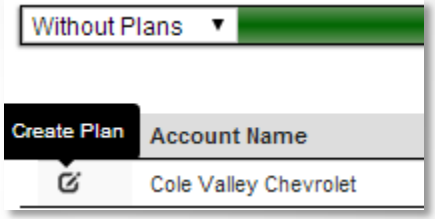
Getting to Know the Home Screen



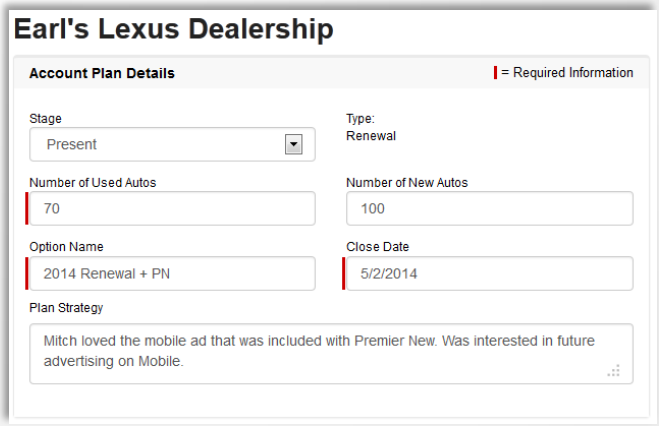
1. **Direct Sales Announcements:** High level announcements pertaining to the sales staff
2. **Reference Documents:** Contains high level documents that may assist you while creating a plan
3. **Accounts:** Displays all of a users Accounts. The default view is accounts without plans, however, you can change your view to see Accounts Without Plans or All Accounts
4. **Create a Plan:** Click here to bring up a pop-up window where you will create a plan
5. **Plans:** Default view displays all of a users Open Plans. You may filter by: Closed, All, 30/60/90 Days
6. **Edit:** Allows you to edit the Plan
7. **Plan Name:** Click the plan name to bring up additional details and create additional plans

How to Create a Plan

Step 1: On the home page click on the **Create Plan** button next to Account Name



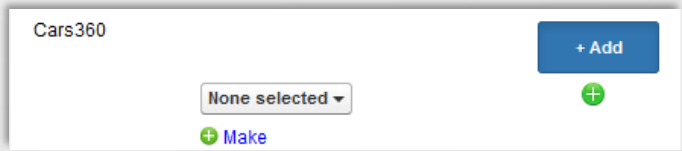
Step 2: Complete the *Number of Used Autos, Close Date and Option Name* fields. Also, Change the Stage and Edit Plan strategy as needed

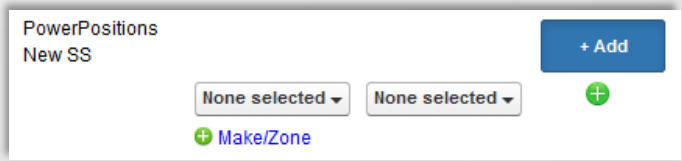


Step 3: Add or remove products from the product list. **Remember to check product availability and follow all cancellation procedures outside of Account Planner.*

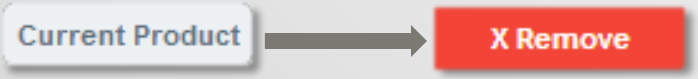
To add a non-make product, click the "+Add" Button

To add a make product, first select the make and/or zone then click "+Add" Button

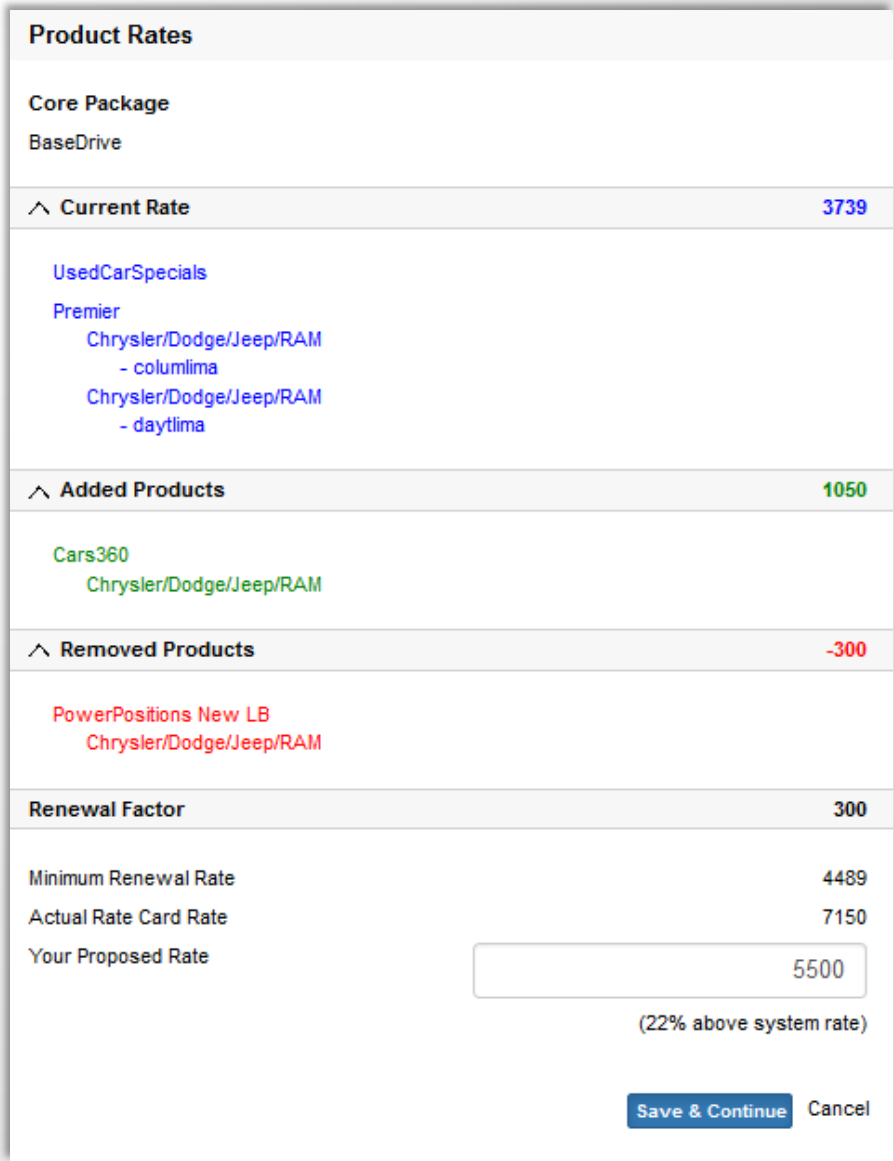




To remove a product, hover over the "Current Product" button and click "Remove"



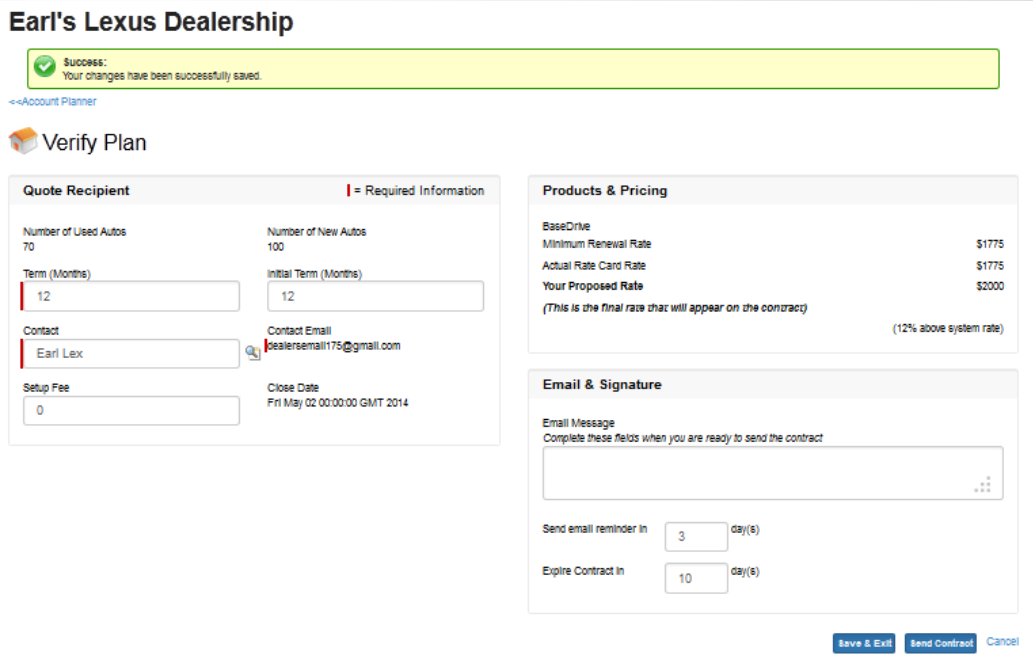
Step 3: As you add or remove products, pricing will update automatically based on rate card and renewal factor. Review the pricing and click “Save & Continue”



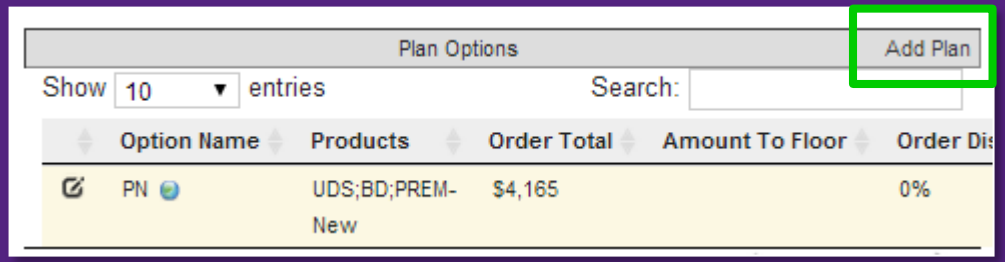
Questions about how pricing was calculated?
Refer to the document “Account Planner Pricing Calculations” in the document drop down menu OR
contact: contractrenewals@cars.com

Step 4: Verify your plan, complete the "Quote Recipient" section completely.* In the "Email & Signature section, set reminder/expiration dates, and customize outgoing email message. Click Save.

*Dealer must be listed as a contact on the account in Salesforce first



To create Multiple Plans:
From your Open Plans. Click on the name of the plan to open right side panel then click "Add Plan".
This is also the process to follow if you have to update a contract that you have already sent



Step 5: Review your Plans with your RSM. (For a printable view of all of your plans, click on “Print Preview”) from your account Planner home screen

User: Plan View: Open Plans

Print

Accounts

Account Name	Record Type ID	Franchise or Independent	Current Product Suite	Total Monthly Rate	Contract Renewal Date
Honda Carland	Dealer - Customer	Franchise	BD, UDS, PREM-Used,	$5,500.00	7/19/2011

Plans	Name	Account ID	Created Date	Amount	Product(s)	Last Modified Date	Stage	Close Date
	Configuration for Honda Carland - 05/30/13 09:57 AM	Honda Carland	5/30/2013 9:57 AM	$4,415.00		5/30/2013 10:03 AM	Needs Analysis	5/31/2013

Barton Chrysler Dodge Jeep RAM	Dealer - Customer	Franchise	BD, NDS, UDS, NLP, PREM-Used,	$5,610.00	10/4/2007

Plans	Name	Account ID	Created Date	Amount	Product(s)	Last Modified Date	Stage	Close Date
	Configuration for Barton Chrysler Dodge Jeep RAM - 05/29/13 09:51 AM	Barton Chrysler Dodge Jeep RAM	5/29/2013 9:51 AM	$4,225.00		5/29/2013 9:53 AM	Needs Analysis	5/31/2013

Acura Carland	Dealer - Customer	Franchise	BD, UDS, PREM-Used,	$5,750.00	8/3/2005

Plans	Name	Account ID	Created Date	Amount	Product(s)	Last Modified Date	Stage	Close Date
	Configuration for Acura Carland - 05/29/13 10:51 AM	Acura Carland	5/29/2013 10:56 AM	$4,500.00		5/29/2013 5:30 PM	Needs Analysis	5/31/2013

Step 6: When the contract is ready to be sent to the dealer, click on the Plan and proceed to Step 4 and “Send Contract”

Step 7: You will receive the contract via email to Review and Sign. Once you have reviewed and signed the contract, it will be sent to the dealer to sign.

Please review and sign your document

From: Jason Pietrucha (jpietrucha@cars.com)
Cars.com

Hello Jason Pietrucha,

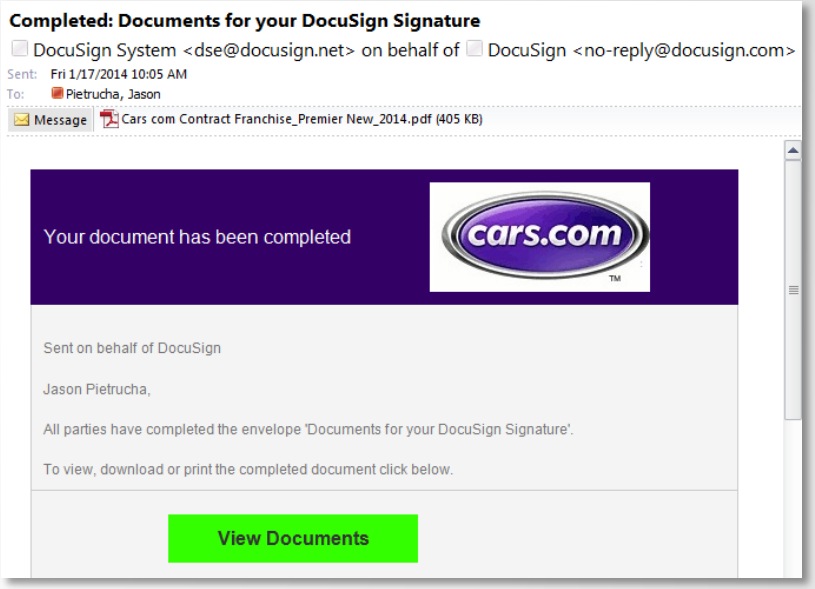
Please call with questions.

View Documents

*Sales rep signs 1st, Dealer signs 2nd

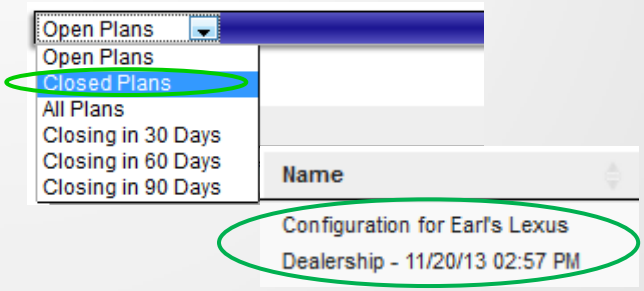
******Always review the contract <u>BEFORE</u> signing******

Step 8: After the dealer signs, you will receive an email notifying you that the contract is complete!

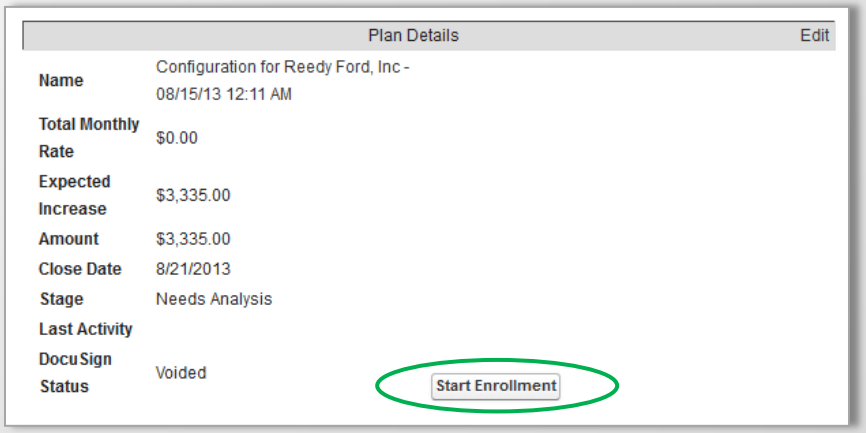


Completing the Electronic Enrollment

1) After you **send** the contract, return to Account Planner and select "Closed Plans" from the dropdown then click on the **Name** of the Plan.



2) To enroll a dealer, click on the "**Start Enrollment**" button that appears in the Plan Details section in the right-side panel.



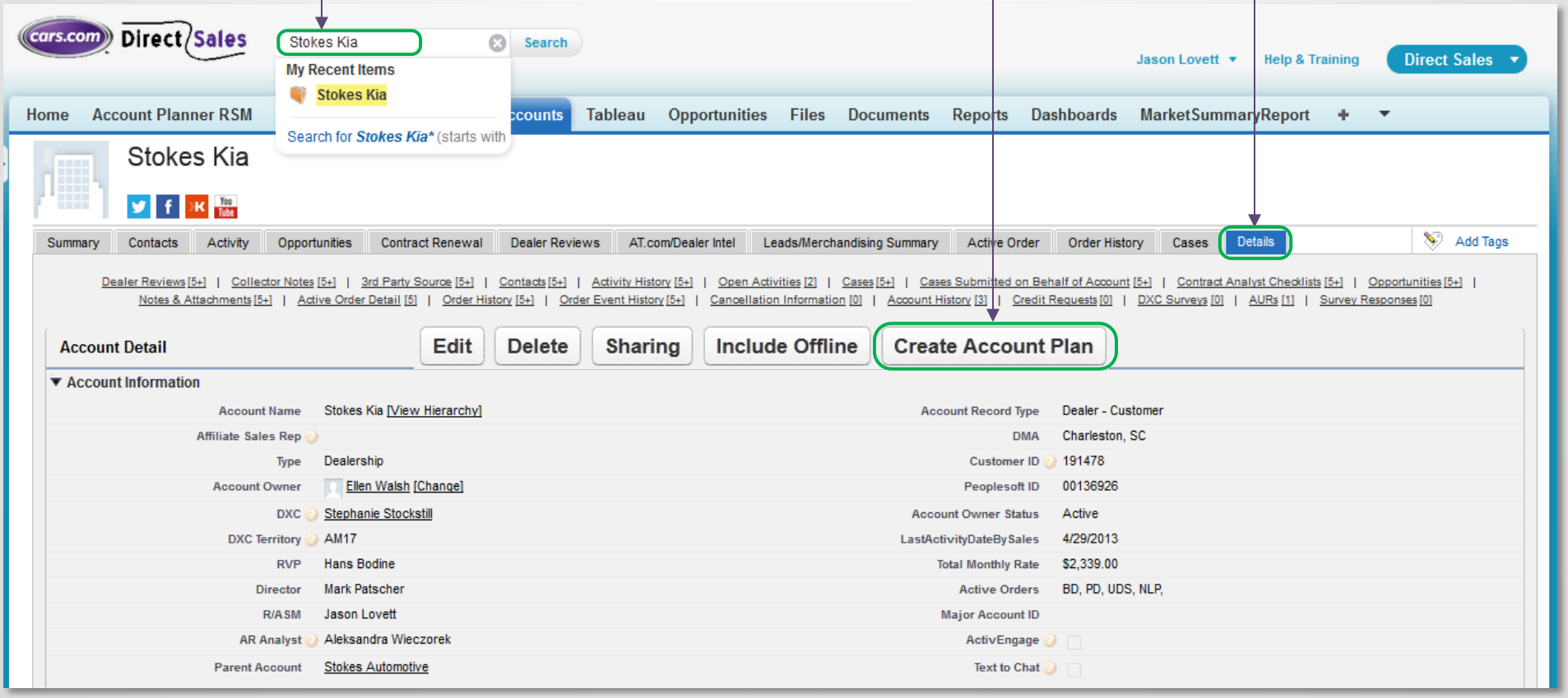
For additional information: view this electronic enrollment instruction video: http://www.youtube.com/watch?v=_POTXLGqzJs

Create a Plan from the Account Page

1. Select the account that you would like to create a plan for

2. Go to the “Details” tab on the account page

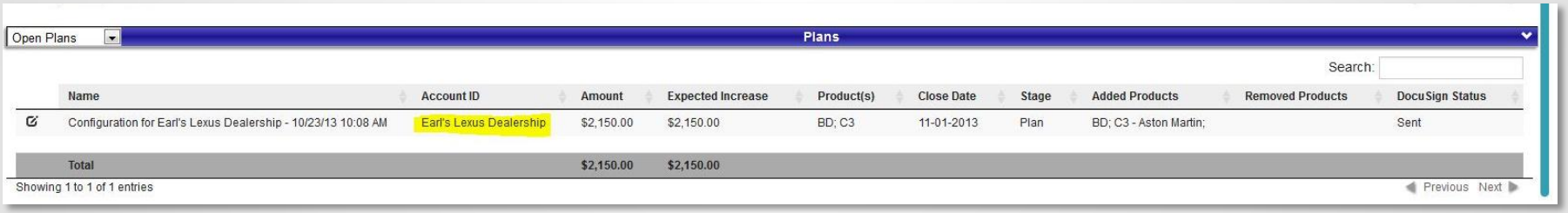
3. Click on the “Create Account Plan” button
You will be brought to the Plan page in Account Planner



Click here to view the training video

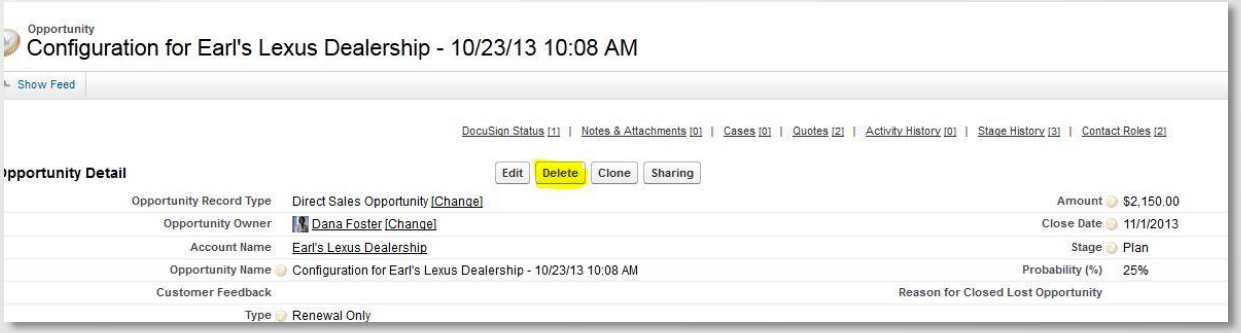
Removing a Plan

Step 1: Go to the account page of the plan you are trying to remove. Below is a screenshot of Account Planner. Click the dealer name, where it is highlighted in yellow.



Step 2: Go to the Opportunities tab.

Step 3: Click on the plan/opportunity you are trying to remove. Confirm it is the correct one and click "Delete"



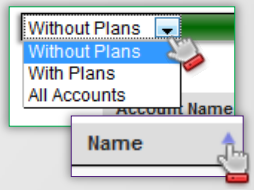
5 Best Practices

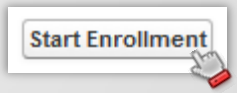
#1 **Use** Firefox or Chrome

#2 **Add** customer's contact information to Salesforce in advance

#3 **Prepare** plans before meeting with a dealer (aim for the beginning of each month)

#4 **Control** the information you see by using filters on Accounts and Plans, and sorting via field headings





#5 **Complete** the e-enrollment after sending the contract

Want additional Account Planner training? Check out this training video

SUPPORT RESOURCES

If any of your teams need any assistance or training on Account Planner, contact the CRM Team:

:CRM@cars.com

:312-508-6800

:Account Planner Group

Training : jpietrucha@cars.com

GET STARTED!