



Sales User Guide



Getting to Know the Home Screen

The screenshot shows the 'Account Planner' interface. At the top, there are navigation tabs: 'Home', 'Accounts', and 'Account Planner' (highlighted with a red box). Below the tabs is a 'Direct Sales Announcements' section with a 'Sales Messages' link and navigation arrows. To the right is a 'Reference documents' section with a dropdown menu showing 'Co-Op Reference Doc' and a 'Go' button. Below these is a section for 'Accounts' with a dropdown menu set to 'Without Plans'. A table lists account information with columns: Account Name, Record Type ID, F or I, Current Product Suite, Total Monthly Rate, and Contract Renewal Date. The first entry is 'Cole Valley Chevrolet'. Below the table is a 'Plans' section with a dropdown menu set to 'Open Plans'. A table lists plan configurations with columns: Name, Account ID, Created Date, Amount, Product(s), Last Modified Date, Stage, and Close Date. The first entry is 'Configuration for Brothers Auto Sales - 05/29/13 03:39 PM'. Numbered callouts 1-7 point to various elements: 1 to the Direct Sales Announcements section, 2 to the Reference Documents section, 3 to the Accounts dropdown, 4 to the 'Create a Plan' icon, 5 to the Plans dropdown, 6 to the 'Edit' icon, and 7 to the 'Plan Name' column header.

Home Accounts **Account Planner**

1 Direct Sales Announcements
Sales Messages

2 Reference documents
Co-Op Reference Doc Go

3 Without Plans Accounts

4 Account Name Record Type ID F or I Current Product Suite Total Monthly Rate Contract Renewal Date
Cole Valley Chevrolet Dealer - Customer Franchise BD, NLP, \$1,350.00 9/26/2011
Showing 1 to 1 of 1 entries

5 Open Plans Plans

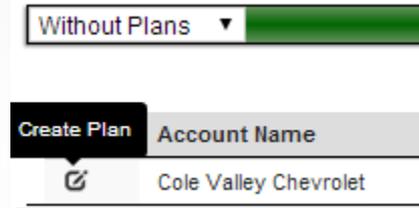
6 Name Account ID Created Date Amount Product(s) Last Modified Date Stage Close Date
7 Configuration for Brothers Auto Sales - 05/29/13 03:39 PM Brothers Auto Sales 05/29/2013 \$3,595.00 05/29/2013 Needs Analysis 5/30/2013
Configuration for Honda Carland - 05/29/13 12:28 PM Honda Carland 05/29/2013 \$4,500.00 05/29/2013 Needs Analysis 5/31/2013
Configuration for Acura Carland - 05/29/13 10:51 AM Acura Carland 05/29/2013 \$4,225.00 05/29/2013 Needs Analysis 5/31/2013
Configuration for Barton Chrysler Dodge Jeep RAM - 05/29/13 09:51 AM Barton Chrysler Dodge Jeep RAM 05/29/2013 Needs Analysis 5/31/2013
Showing 1 to 4 of 4 entries

- 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

Earl's Lexus Dealership

Account Plan Details I = Required Information

Stage: Present Type: Renewal

Number of Used Autos: 70 Number of New Autos: 100

Option Name: 2014 Renewal + PN Close Date: 5/2/2014

Plan Strategy: Mitch loved the mobile ad that was included with Premier New. Was interested in future advertising on Mobile.

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

UsedCarSpecials + Add

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

Cars360 + Add

None selected +

+ Make

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

Current Product

X Remove

PowerPositions
New SS + Add

None selected None selected +

+ Make/Zone



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

Product Rates	
Core Package	
BaseDrive	
^ Current Rate	3739
UsedCarSpecials	
Premier	
Chrysler/Dodge/Jeep/RAM	
- columima	
Chrysler/Dodge/Jeep/RAM	
- daytima	
^ Added Products	1050
Cars360	
Chrysler/Dodge/Jeep/RAM	
^ Removed Products	-300
PowerPositions New LB	
Chrysler/Dodge/Jeep/RAM	
Renewal Factor	300
Minimum Renewal Rate	4489
Actual Rate Card Rate	7150
Your Proposed Rate	<input type="text" value="5500"/>
(22% above system rate)	
<input type="button" value="Save & Continue"/> <input type="button" value="Cancel"/>	



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**

Earl's Lexus Dealership

Success: Your changes have been successfully saved.

<-Account Planner

Verify Plan

Quote Recipient |= Required Information

Number of Used Autos 70	Number of New Autos 100
Term (Months) <input type="text" value="12"/>	Initial Term (Months) <input type="text" value="12"/>
Contact <input type="text" value="Earl Lex"/>	Contact Email <input type="text" value="dealersemail175@gmail.com"/>
Setup Fee <input type="text" value="0"/>	Close Date Fri May 02 00:00:00 GMT 2014

Products & Pricing

BaseDrive	
Minimum Renewal Rate	\$1775
Actual Rate Card Rate	\$1775
Your Proposed Rate	\$2000

(This is the final rate that will appear on the contract) (12% above system rate)

Email & Signature

Email Message
Complete these fields when you are ready to send the contract

Send email reminder in day(s)

Expire Contract in day(s)

[Save & Exit](#) [Send Contract](#) [Cancel](#)

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*****

Plan Options					Add Plan
Show	10	▼	entries	Search:	<input type="text"/>
Option Name	Products	Order Total	Amount To Floor	Order Dis	
PN	UDS;BD;PREM- New	\$4,165		0%	



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

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.

***Sales rep signs 1st, Dealer signs 2nd**

*****Always review the contract BEFORE signing*****

User Plan View: Print

Accounts

Account Name	Record Type ID	Franchise or Independent	Current Product Suite	Total Monthly Rate	Contract Renewal Date			
Honda Carlund	Dealer - Customer	Franchise	BC, LDS, 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 Carlund - 05/30/13 09:57 AM	Honda Carlund	5/30/2013 9:57 AM	\$4,415.00		5/30/2013 10:03 AM	Needs Analysis	5/31/2013
Baron Chrysler Dodge Jeep RAM	Dealer - Customer	Franchise	BC, NDS, LDS, NLP, PREM-Used	\$5,910.00	10/4/2007			
Plans	Name	Account ID	Created Date	Amount	Product(s)	Last Modified Date	Stage	Close Date
	Configuration for Baron Chrysler Dodge Jeep RAM - 05/29/13 09:51 AM	Baron 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 Carlund	Dealer - Customer	Franchise	BC, LDS, 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 Carlund - 05/29/13 10:56 AM	Acura Carlund	5/29/2013 10:56 AM	\$4,500.00		5/29/2013 5:30 PM	Needs Analysis	5/31/2013

Please review and sign your document

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

Hello Jason Pietrucha,

Please call with questions.

View Documents



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

Completed: Documents for your DocuSign Signature

DocuSign System <dse@docusign.net> on behalf of DocuSign <no-reply@docusign.com>

Sent: Fri 1/17/2014 10:05 AM

To: Pietrucha, Jason

Message Cars.com Contract Franchise_Premier New_2014.pdf (405 KB)

Your document has been completed



Sent on behalf of DocuSign

Jason Pietrucha,

All parties have completed the envelope 'Documents for your DocuSign Signature'.

To view, download or print the completed document click below.

[View Documents](#)

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.

Open Plans
Open Plans
Closed Plans
All Plans
Closing in 30 Days
Closing in 60 Days
Closing in 90 Days

Name
Configuration for Earl's Lexus Dealership - 11/20/13 02:57 PM

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):

Plan Details		Edit
Name	Configuration for Reedy Ford, Inc - 08/15/13 12:11 AM	
Total Monthly Rate	\$0.00	
Expected Increase	\$3,335.00	
Amount	\$3,335.00	
Close Date	8/21/2013	
Stage	Needs Analysis	
Last Activity		
DocuSign Status	Voided	

[Start Enrollment](#)



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

cars.com Direct Sales

Stokes Kia

My Recent Items

- Stokes Kia

Search for Stokes Kia* (starts with)

Jason Lovett Help & Training Direct Sales

Home Account Planner RSM

Accounts Tableau Opportunities Files Documents Reports Dashboards MarketSummaryReport

Stokes Kia

Summary Contacts Activity Opportunities Contract Renewal Dealer Reviews AT.com/Dealer Intel Leads/Merchandising Summary Active Order Order History Cases **Details** Add Tags

Dealer Reviews [5+] | Collector Notes [5+] | 3rd Party Source [5+] | Contacts [5+] | Activity History [5+] | Open Activities [2] | Cases [5+] | Cases Submitted on Behalf of Account [5+] | Contract Analyst Checklists [5+] | Opportunities [5+] | Notes & Attachments [5+] | Active Order Detail [5] | Order History [5+] | Order Event History [5+] | Cancellation Information [0] | Account History [3] | Credit Requests [0] | DXC Surveys [0] | AURs [1] | Survey Responses [0]

Account Detail

Edit Delete Sharing Include Offline **Create Account Plan**

Account Information

Account Name	Stokes Kia View Hierarchy	Account Record Type	Dealer - Customer
Affiliate Sales Rep		DMA	Charleston, SC
Type	Dealership	Customer ID	191478
Account Owner	Ellen Walsh [Change]	Peoplesoft ID	00136926
DXC	Stephanie Stockstill	Account Owner Status	Active
DXC Territory	AM17	LastActivityDateBySales	4/29/2013
RVP	Hans Bodine	Total Monthly Rate	\$2,339.00
Director	Mark Patscher	Active Orders	BD, PD, UDS, NLP,
R/ASM	Jason Lovett	Major Account ID	
AR Analyst	Aleksandra Wiecezorek	ActivEngage	<input type="checkbox"/>
Parent Account	Stokes Automotive	Text to Chat	<input type="checkbox"/>

[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.

Name	Account ID	Amount	Expected Increase	Product(s)	Close Date	Stage	Added Products	Removed Products	DocuSign Status
Configuration for Earl's Lexus Dealership - 10/23/13 10:08 AM	Earl's Lexus Dealership	\$2,150.00	\$2,150.00	BD; C3	11-01-2013	Plan	BD; C3 - Aston Martin;		Sent
Total		\$2,150.00	\$2,150.00						

Showing 1 to 1 of 1 entries

Step 2: Go to the Opportunities tab.

Summary | Contacts | Activity | **Opportunities** | Contract Renewal | Dealer Reviews | AT.com/Dealer Intel | Leads/Merchandising Summary | Active Order | Order History | Cases | Details

Summary

▼ Summary

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

Opportunity
Configuration for Earl's Lexus Dealership - 10/23/13 10:08 AM

Show Feed

DocuSign Status (1) | Notes & Attachments (0) | Cases (0) | Quotes (2) | Activity History (0) | Stage History (3) | Contact Roles (2)

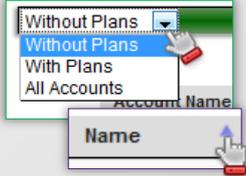
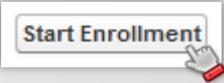
Opportunity Detail

Edit | **Delete** | Clone | Sharing

Opportunity Record Type	Direct Sales Opportunity [Change]	Amount	\$2,150.00
Opportunity Owner	Dana Foster [Change]	Close Date	11/1/2013
Account Name	Earl's Lexus Dealership	Stage	Plan
Opportunity Name	Configuration for Earl's Lexus Dealership - 10/23/13 10:08 AM	Probability (%)	25%
Customer Feedback		Reason for Closed Lost Opportunity	
Type	Renewal Only		



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 



SUPPORT RESOURCES

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



[:CRM@cars.com](mailto:CRM@cars.com)



:312-508-6800



:Account Planner Group

Training : jpietrucha@cars.com





GET STARTED!

