



OUT-OF-STOCK PROCEDURES

PART 1

OUT-OF-STOCK PROCEDURES

OUT - OF - STOCK VEHICLES

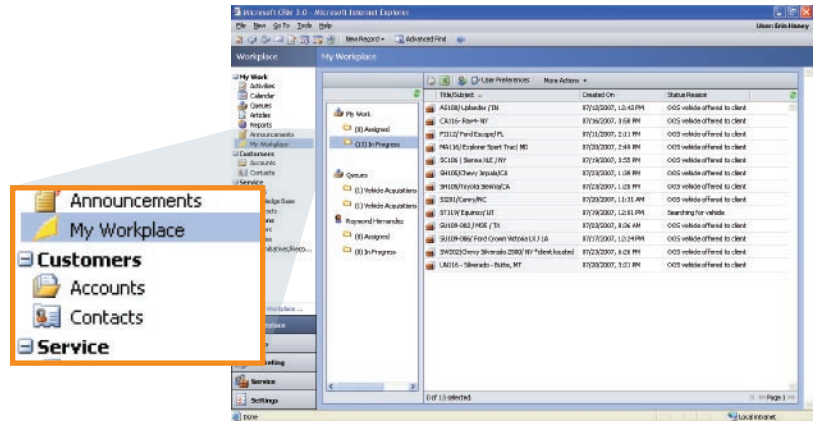
- Viable method of securing vehicles quickly for:
 - New hires
 - Totaled vehicles
- Respond to all **STOCK REQUESTS WITHIN 48 HOURS** – either update customer with progress or offer vehicle (s)

PROCEDURES FOR STOCK PURCHASES

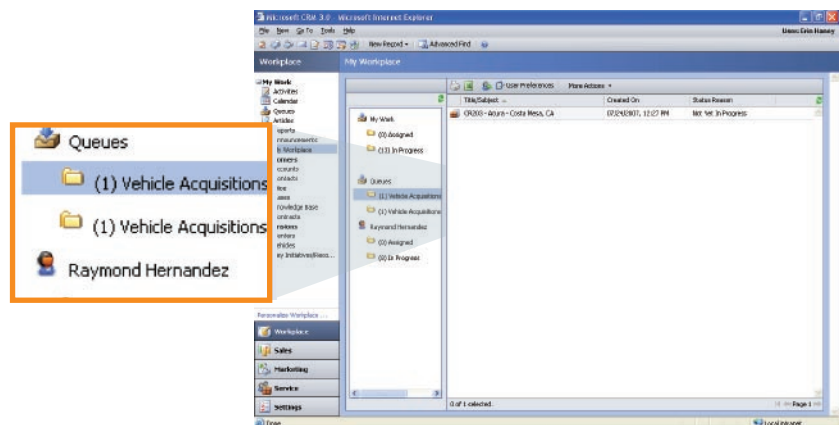
All requests will generally come through CSS, although a handful of clients will still call or fax in a request.



- 1 While in CRM, **OPEN “MY WORKPLACE”**

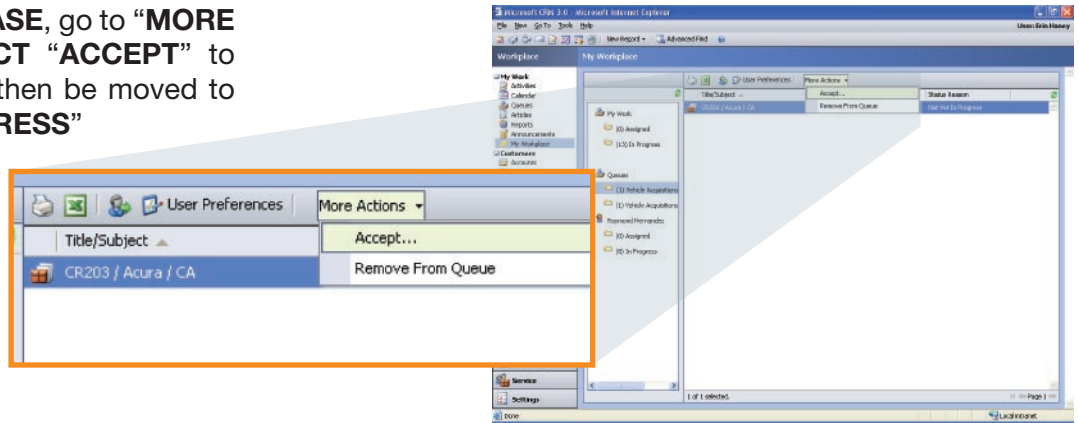


- 2 Under Queues, **SELECT “VEHICLE ACQUISITIONS”**

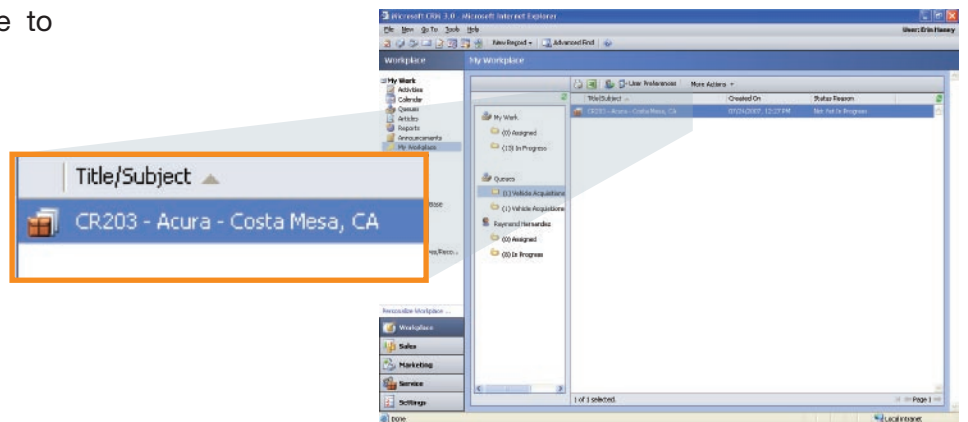


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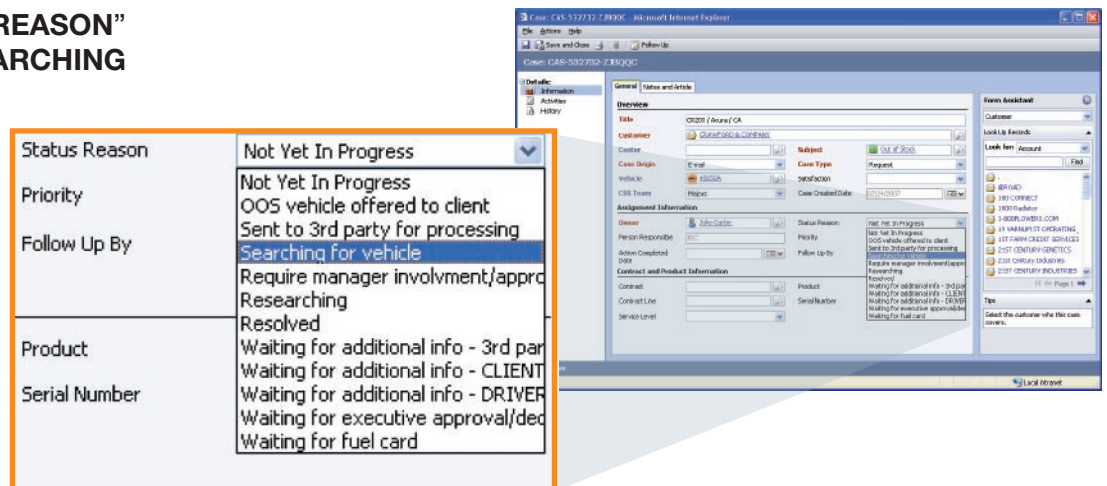
- 3** **CLICK** on **DESIRED CASE**, go to **"MORE ACTIONS"** and **SELECT "ACCEPT"** to accept case (case will then be moved to your **"WORK IN PROGRESS"**)



- 4** **DOUBLE CLICK** selected case to open

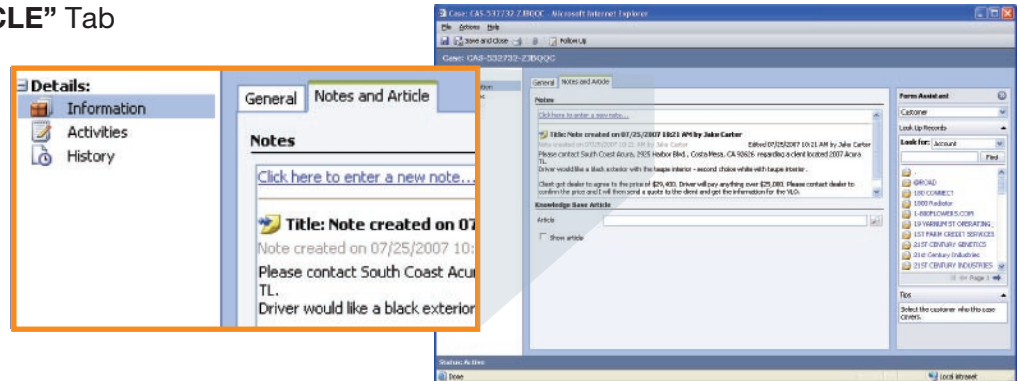


- 5** **SELECT "STATUS REASON"** and change to **"SEARCHING FOR VEHICLE"**

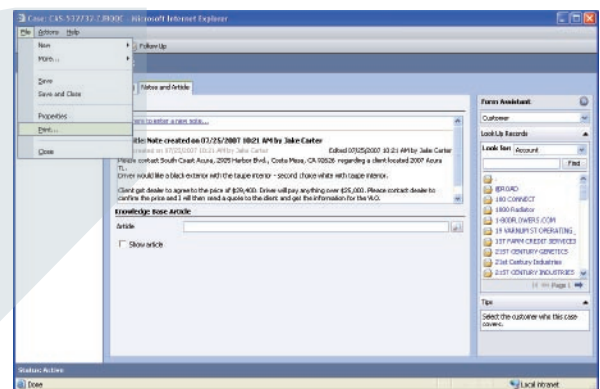
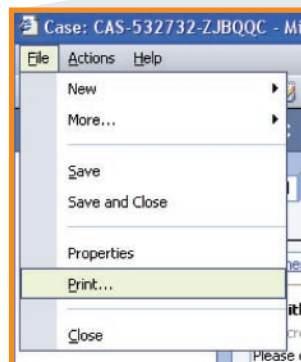


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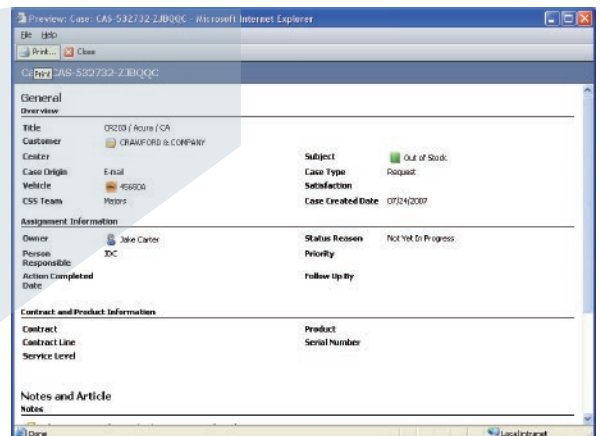
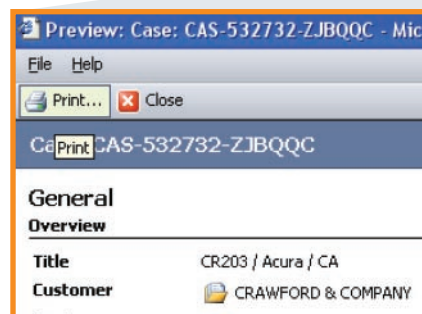
- 6** Select **"NOTES AND ARTICLE"** Tab



- 7** Select **"FILE"**, then **"PRINT"** to print case notes

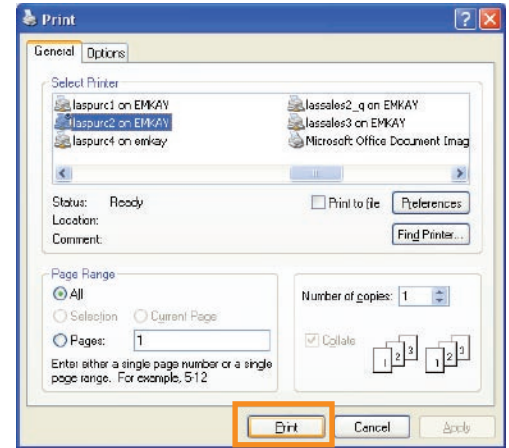


- 8** Select **"PRINT"**

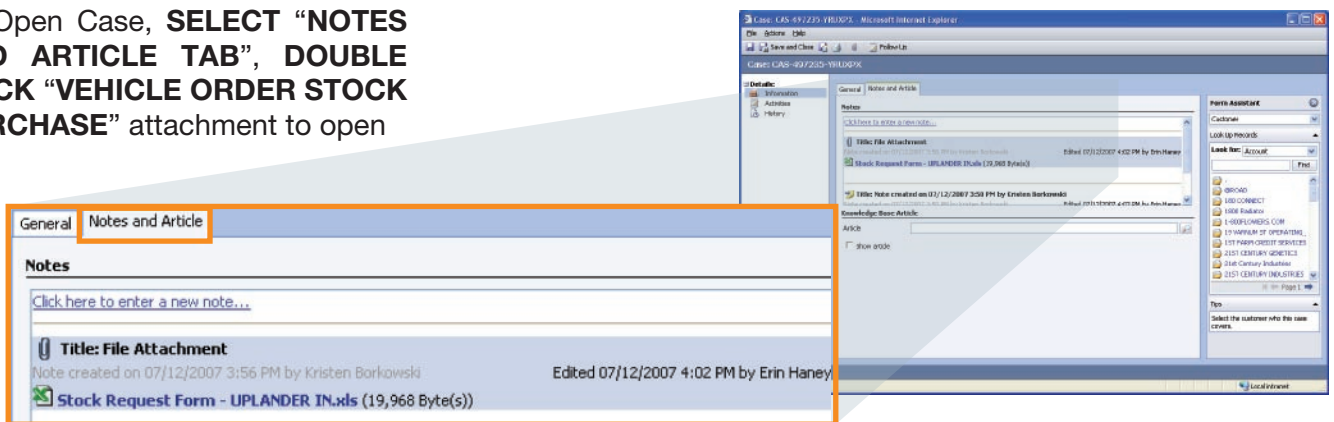


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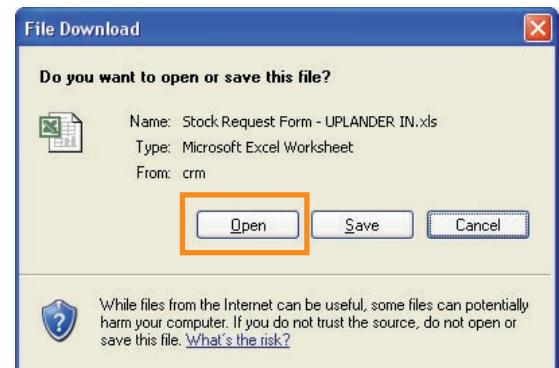
9 When Print Dialogue Box appears, **SELECT "PRINT"**



10 Re-Open Case, **SELECT "NOTES AND ARTICLE TAB", DOUBLE CLICK "VEHICLE ORDER STOCK PURCHASE" attachment to open**



11 Click **"OPEN"**



OUT-OF-STOCK PROCEDURES

12 SELECT the **PRINT** ICON to Print Excel Sheet



Print Icon
in Excel

PLEASE LOCATE VEHICLE AS SPECIFIED BELOW				
YEAR	MAKE	MODEL	EXTERIOR COLOR	INTERIOR COLOR
			TOP 3 CHOICES	NOT ACCEPTABLE

13 Re-Open Case, **SELECT "NOTES AND ARTICLE TAB", DOUBLE CLICK "VEHICLE ORDER STOCK PURCHASE" attachment to open**



Title: File Attachment

Note created on 07/12/2007 12:33 PM by Douglas French

2008 Ford Escape XLT 4x4 APPROVED.pdf (65,805 Byte(s))

14 Click **"OPEN"** to open file



Do you want to open or save this file?

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OUT-OF-STOCK PROCEDURES

- 15** SELECT the **PRINT** ICON to Print Excel Sheet



Print Icon
in Excel

YEAR	MAKE	MODEL	EXTERIOR COLOR	INTERIOR COLOR
			TOP 3 CHOICES	NOT ACCEPTABLE

- 16** Re-Open Case, **SELECT "NOTES AND ARTICLE TAB", DOUBLE CLICK "VEHICLE ORDER STOCK PURCHASE" attachment to open**

Title: File Attachment
Note created on 07/12/2007 12:33 PM by Douglas French

2008 Ford Escape XLT 4x4 APPROVED.pdf (65,805 Byte(s))

- 17** Click **"OPEN"** to open file

Do you want to open or save this file?

Name: 2008 Ford Escape XLT 4x4 APPROVED.pdf
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NOTES