



AUTOLOGUE
COMPUTER SYSTEMS, INC.

BUSINESS INTELLIGENCE CRM – ABOUT THE CUSTOMER INTERACTIVE DASHBOARD





Sales BI

GOmobile

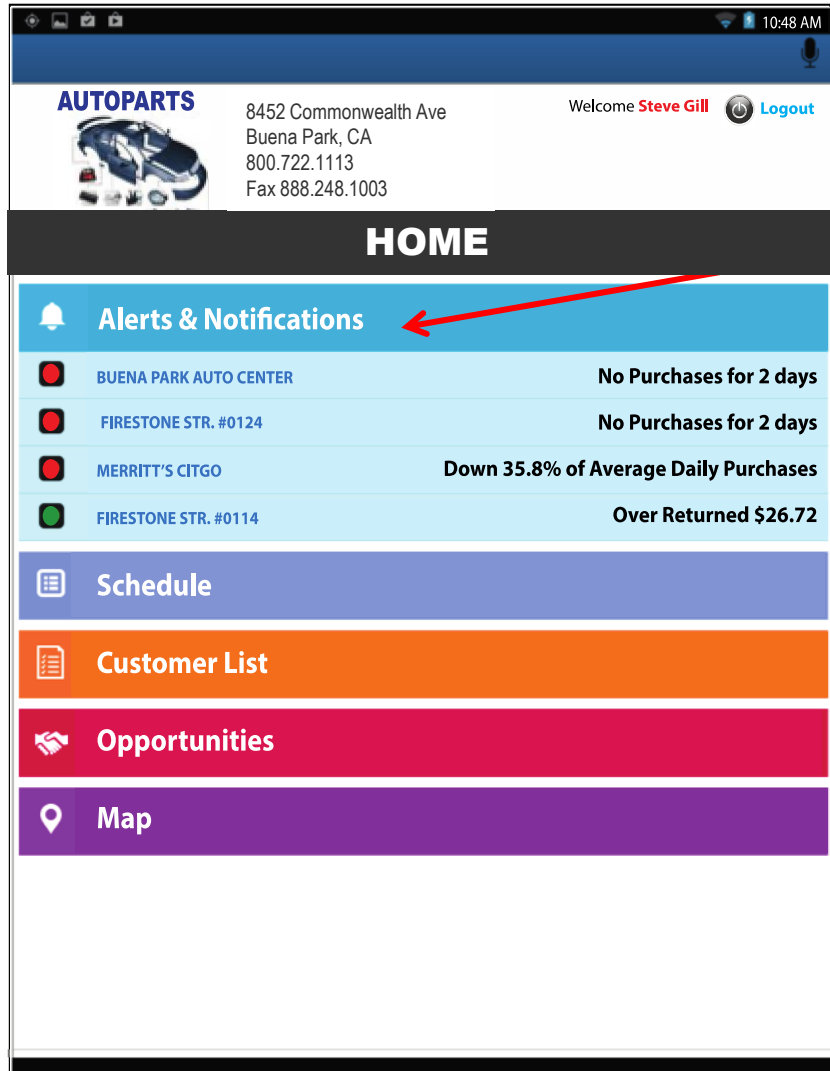
Salesperson's

Dream Come True

...all in the palm of your hand.

AUTOLOGUE
COMPUTER SYSTEMS, INC.

Salesperson's Home Page



View Alerts AND Notifications (user defined parameters)

- Alerts and Notifications parameters defined by management
- Quick Search to access Customer's detailed information, ie., Business Intelligence, Notes, CRM: About the Customer, etc.
- Secure Login with easy access to each salesperson's customer's information

Salesperson's Scheduler

AUTOPARTS 8452 Commonwealth Ave
Buena Park, CA
800.722.1113
Fax 888.248.1003

Welcome **Joe Waters** Logout

SCHEDULER

HOME **SCHEDULE**

Day Today
< Friday, September 26 >

All Day

8:00 Customer Name: ALEX'S GARAGE
Subject: Raybestos Changeover
Type: Visit

9:00 Customer Name: CHUCKS AUTOMOTIVE REPAIR

10:00 Customer Name: DENNIS DAVID
Subject: Meet Delco Rep to discuss line change
Type: Visit

11:00 Customer Name: SKEETERS AUTOMOTIVE
Subject: Meet Skeeter for lunch
Type: Visit

Show Business Hours

NON SCHEDULED TASKS

- ✓ Offer Vendor Managed Inventory /create stock orders on tablet
- ✓ Cold call at least 3 potential accounts weekly
- ✓ Show customers how to use eOffice/set up shortcut on their PC

- Organize Daily, Weekly and Recurring Calls, Appointments and Visits

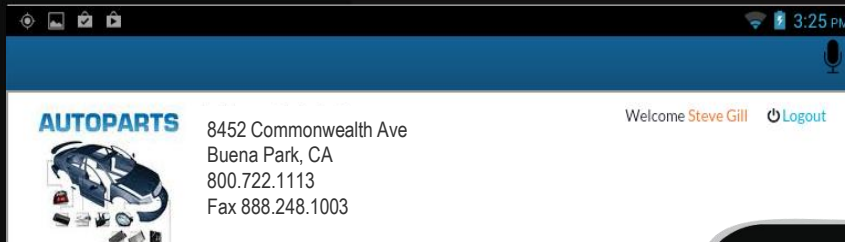
All Schedule entries hyperlink to Customer Navigation page

Non time/date sensitive
"TO DO's"

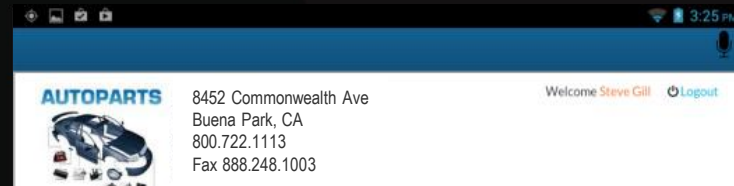
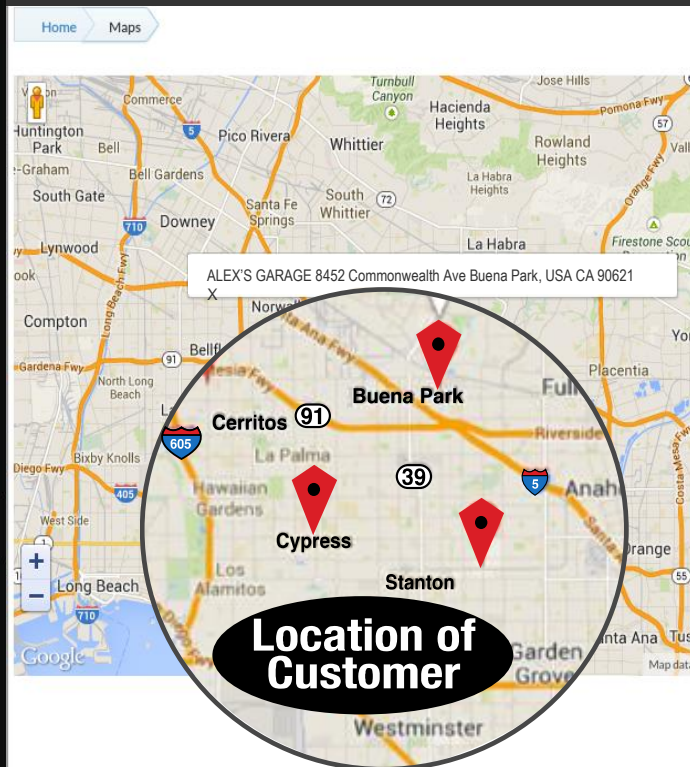


Appointments for Today

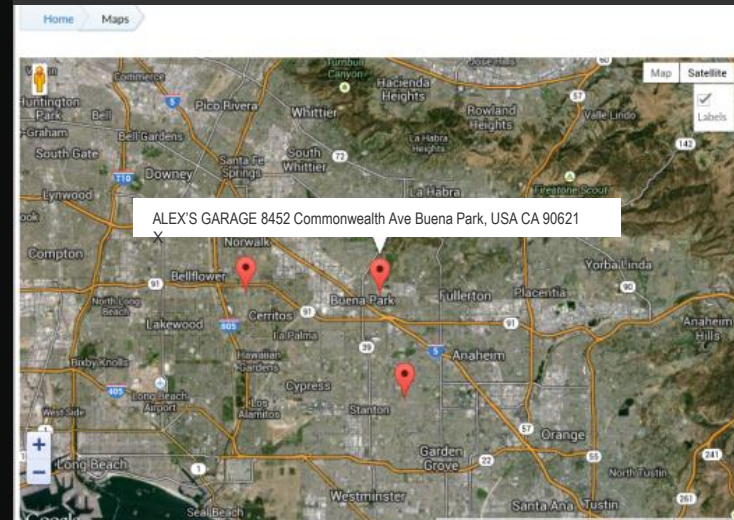
- ✓ Plan your Route with the Map linked to the Scheduler
- ✓ Map and Satellite Views



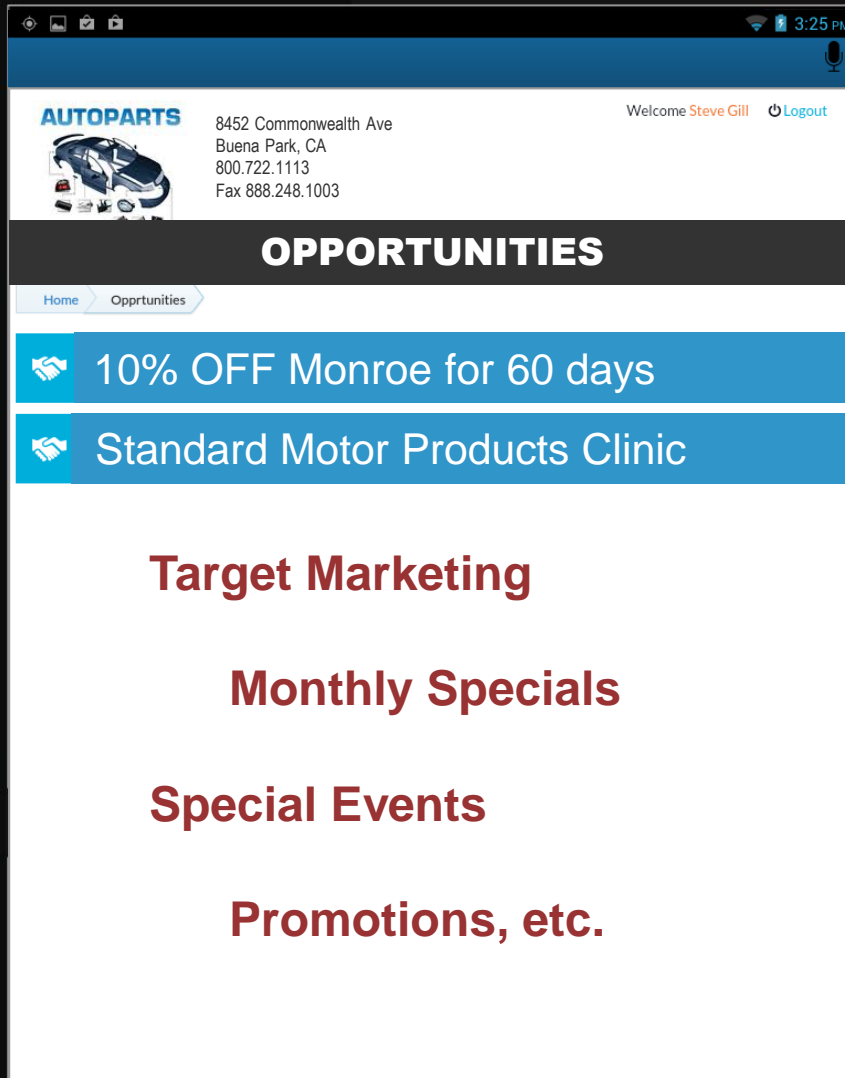
MAP



MAP



Sales Campaigns: Opportunities

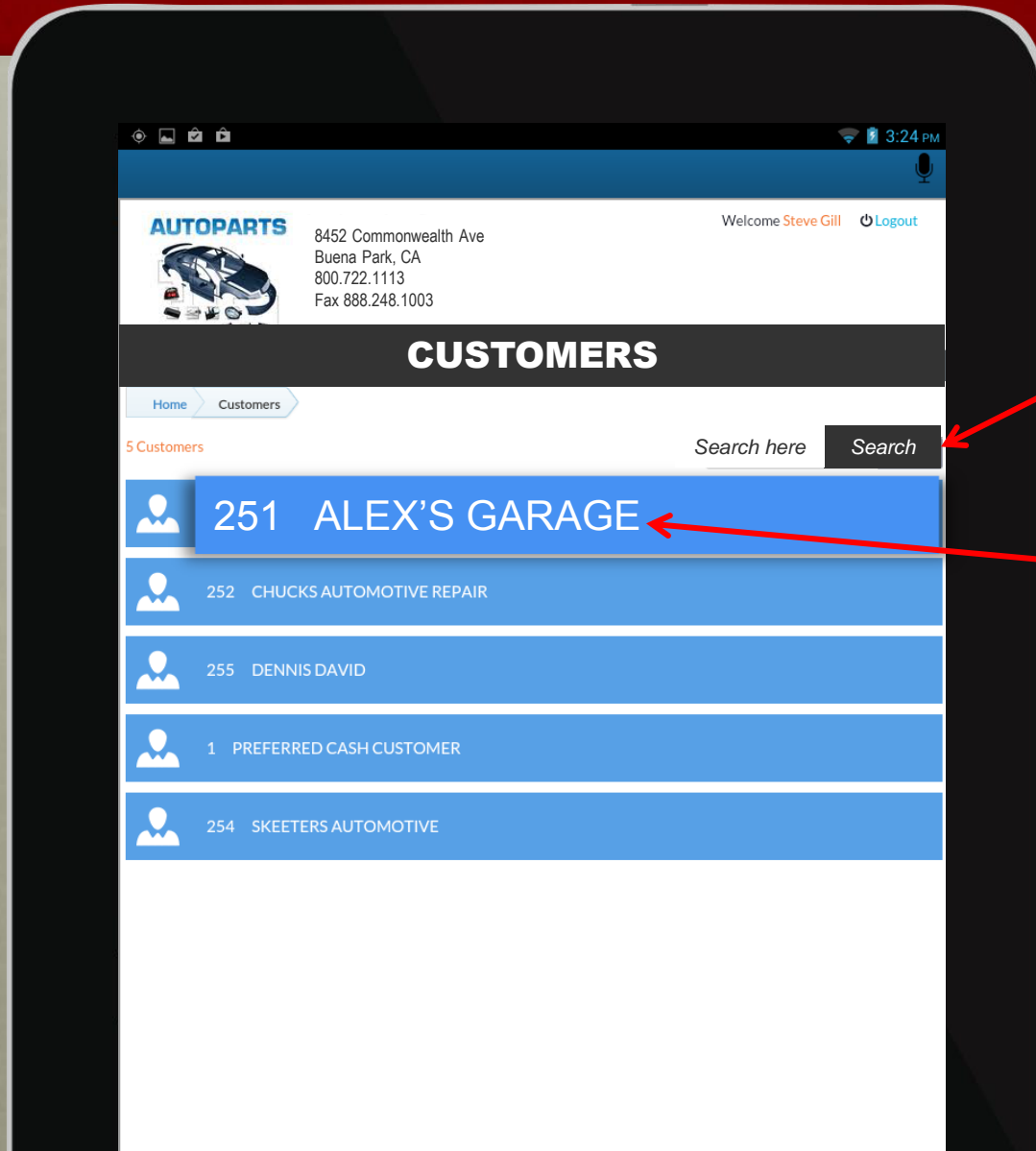


Online access to:

- ✓ Company Information
- ✓ Instructional Documents
- ✓ Vendor Information
- ✓ Websites
- ✓ Company Announcements

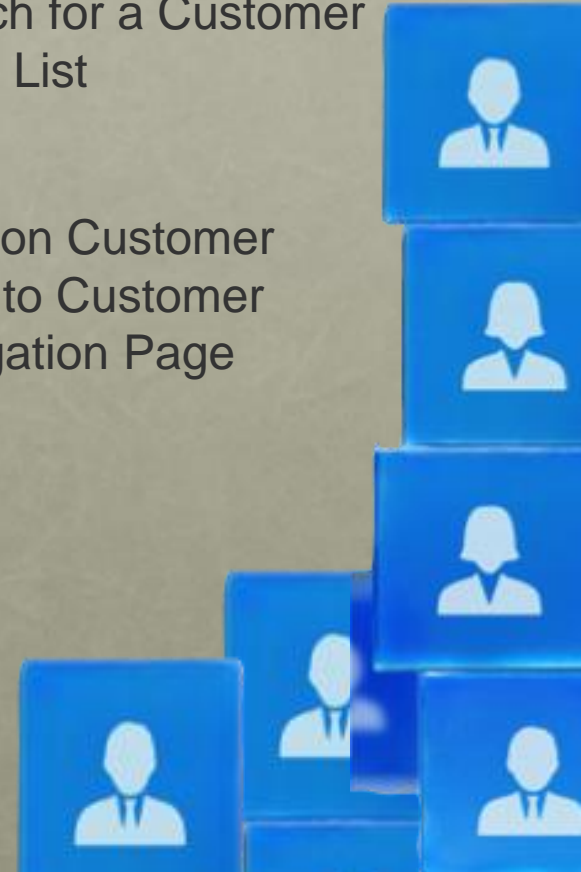


Salesperson's Customer List

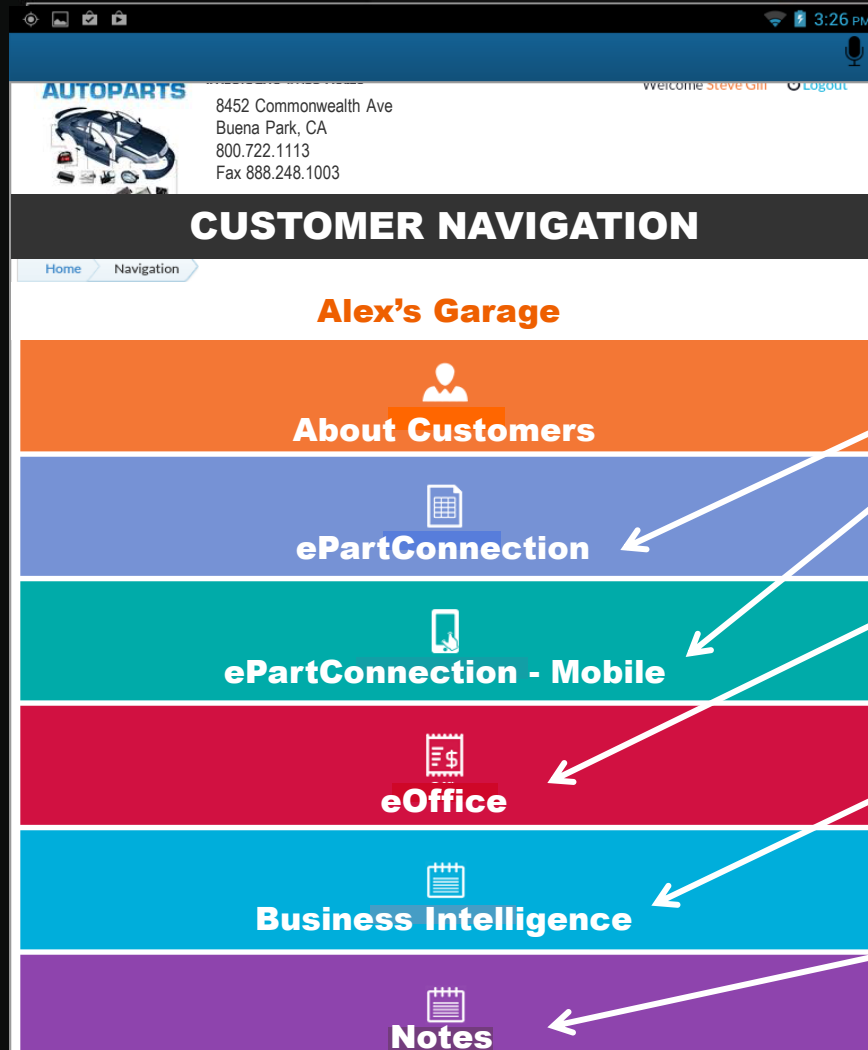


Search for a Customer in the List

Click on Customer to go to Customer Navigation Page



Customer Navigation Page



Individual Customer Navigation Page provides direct access.

Direct link to:

ePartConnection

WEB AND MOBILE

Place stock orders, vendor manage inventory directly to Management System.

Direct link to: **e**Office

View invoices, credits, statements and pay your bill on line.

Direct link to: **e**Analysis

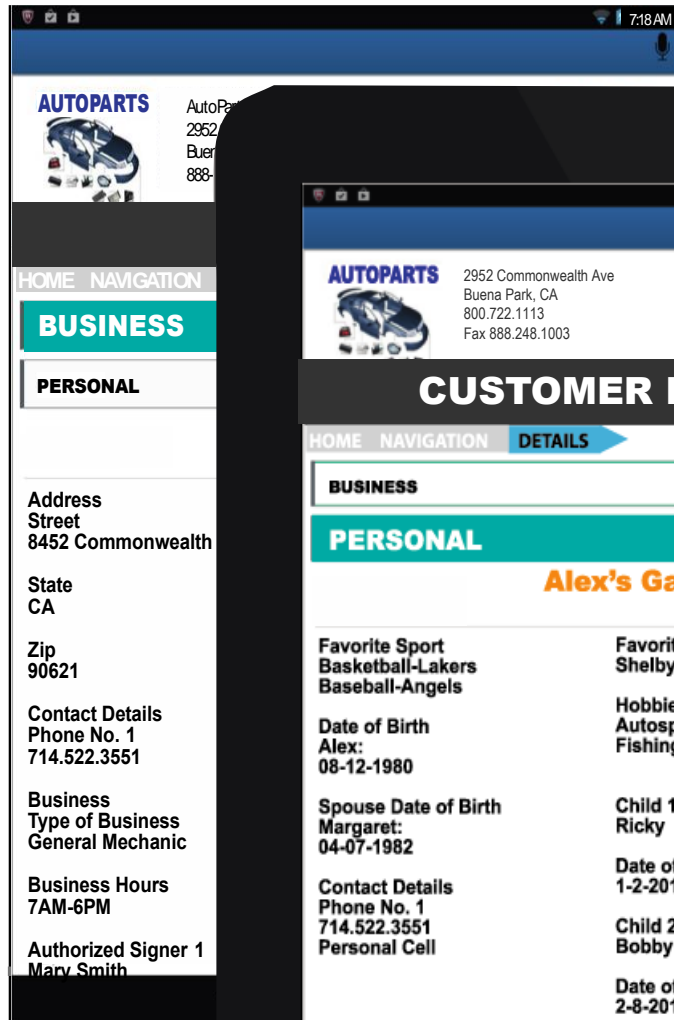
BUSINESS INTELLIGENCE

View month to date, year-to-date and product line performance.

Direct link to: **e**Notes

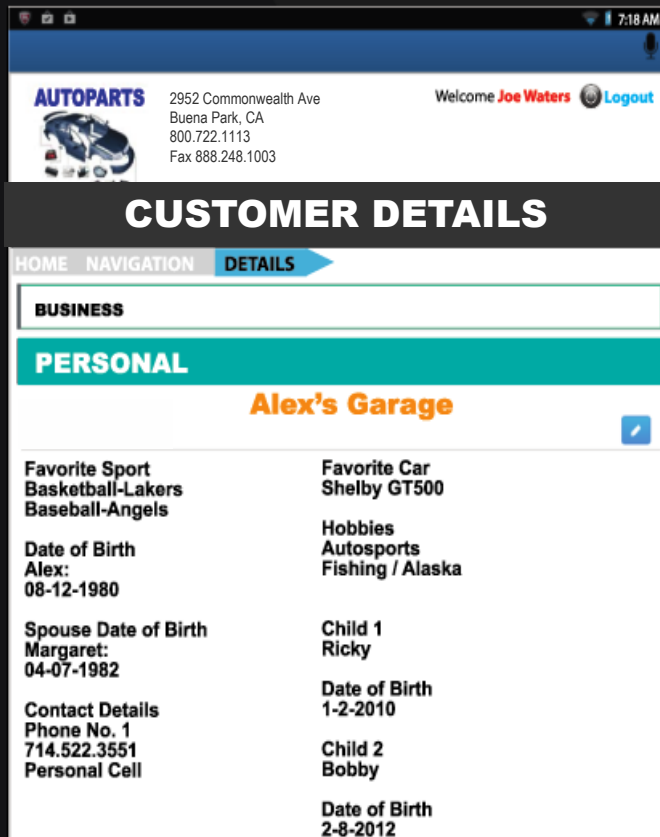
Use voice recognition to record notes for each visit.

CRM: About the Customer



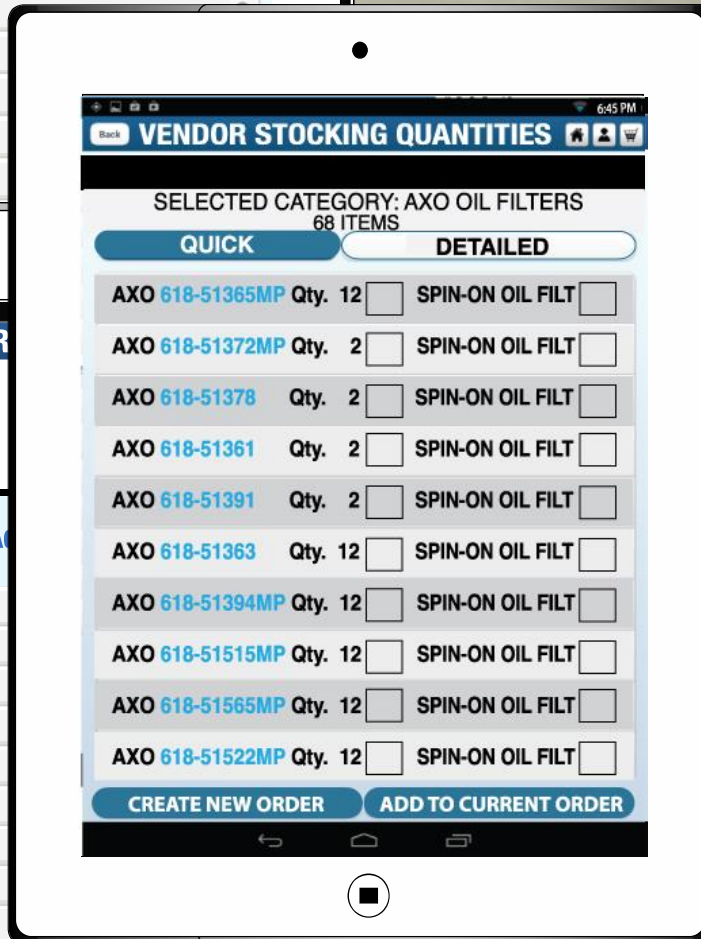
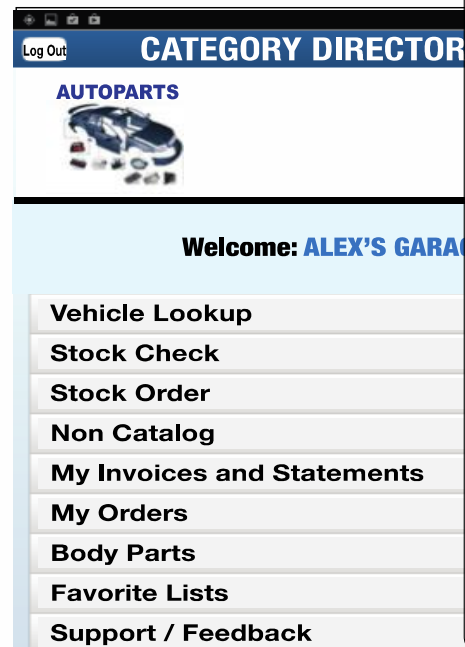
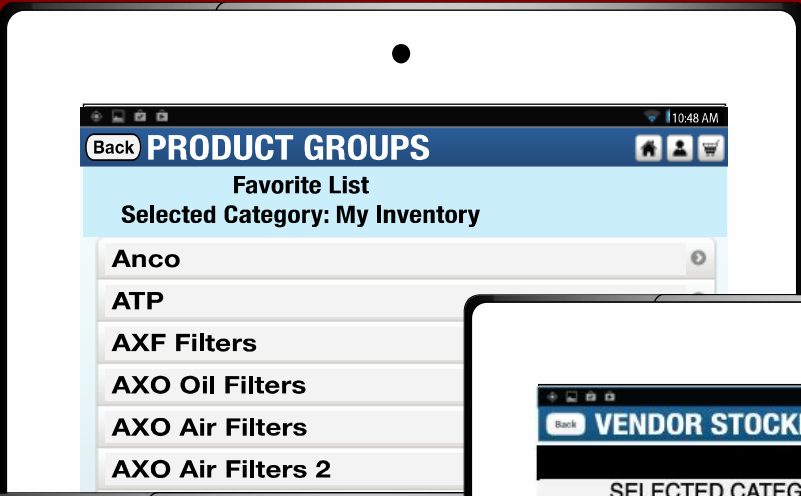
Business and Personal Information

- Build and strengthen your customer relationship/loyalty by capturing their business and personal information
- A 360 degree view of your customer's personal favorites: Sports, Hobbies, Cars, plus Family Birthday reminders
- Key business info: Business Hours, Type of Business, Authorized Buyers, and Brand Preference



Direct Connection

REAL TIME to your Management System



Vendor Managed Inventory (VMI)

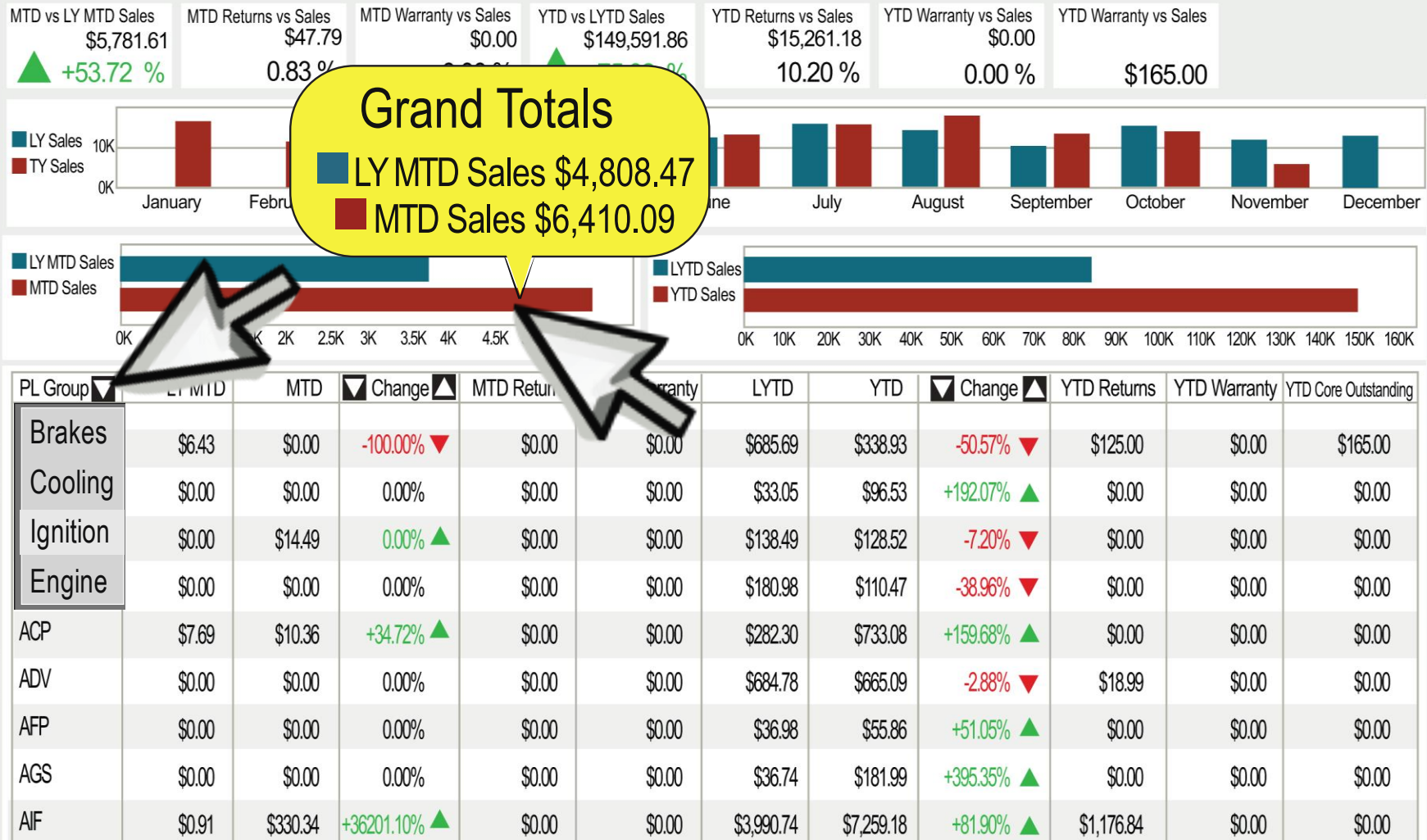
- Stock Orders
- Check Stock
- Catalog Parts Lookup
- Non-Cataloged Parts

**Orders go directly
to the Printer!**

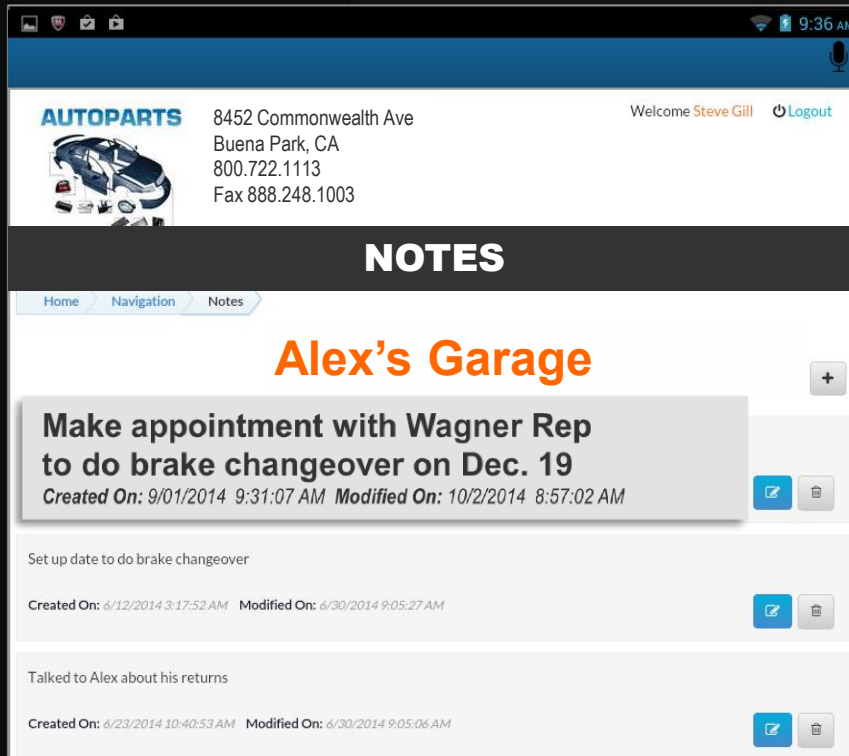
BI Dashboard

Interactive Business Intelligence MTD and YTD Sales Comparisons by Line and Product Group

ABC Auto Parts Inc. Customer 251 – ALEX'S GARAGE



Customer Notes



Monitor Salesperson Productivity

- Time and date stamped
- Take and store customer notes to enhance credibility
- Save all notes to reference action items to ensure customer satisfaction.

“Get the job done!”



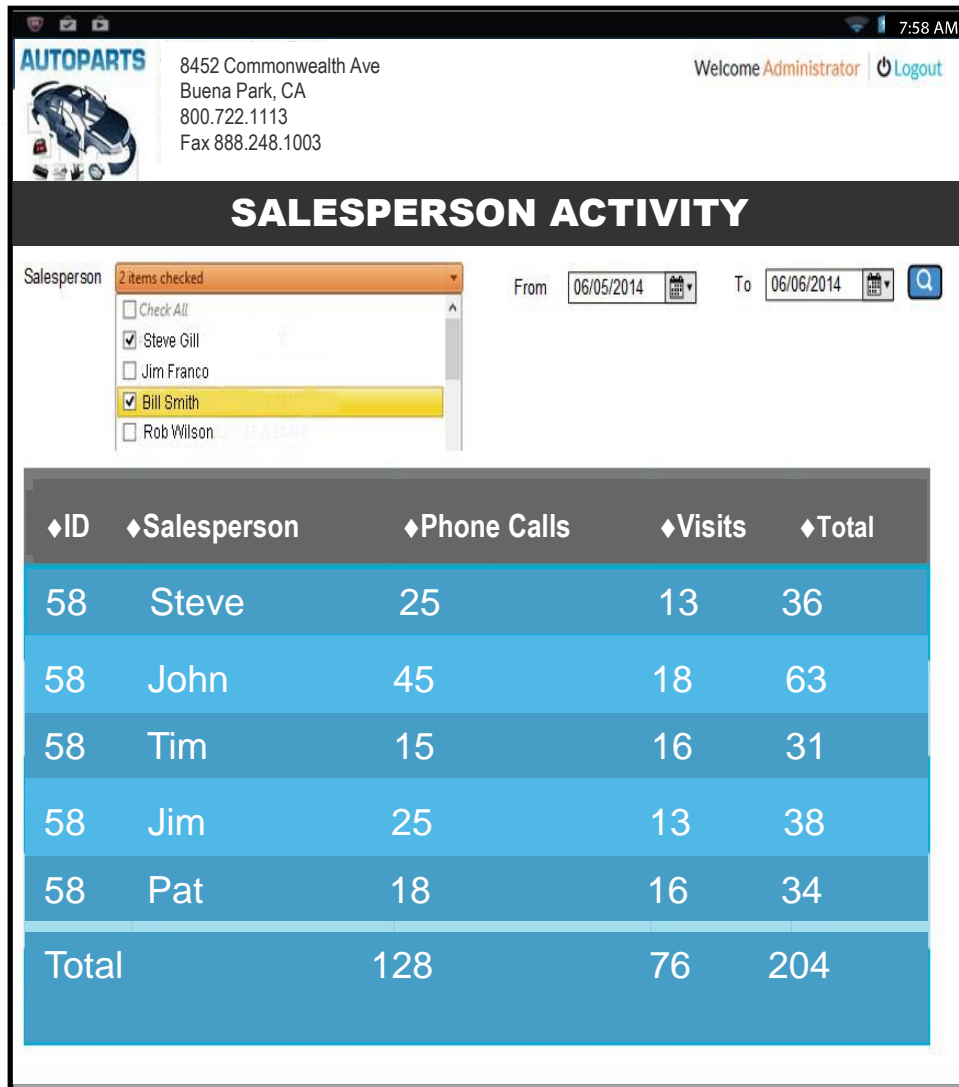
Owner Module: Main Screen



- Global Access to all Salesperson Sales Activity – Calls & Visits
- View progress of salesperson's appointments: Daily, Weekly and Monthly
- Search by Single Field Entry: Sports, Birthdays, Business type, etc.
- View all Sales/Goals by Salesperson, including Notes by date
- GPS Tracking shows time and duration of salesperson's visit to each customer.

*Integrates to all major
Management Systems*

Salesperson Activity



| ◆ID | ◆Salesperson | ◆Phone Calls | ◆Visits | ◆Total |
|-------|--------------|--------------|---------|--------|
| 58 | Steve | 25 | 13 | 36 |
| 58 | John | 45 | 18 | 63 |
| 58 | Tim | 15 | 16 | 31 |
| 58 | Jim | 25 | 13 | 38 |
| 58 | Pat | 18 | 16 | 34 |
| Total | | 128 | 76 | 204 |

View **ALL**
Scheduled
Calls and
Visits by
Salesperson.



Calls Drilldown by Salesperson



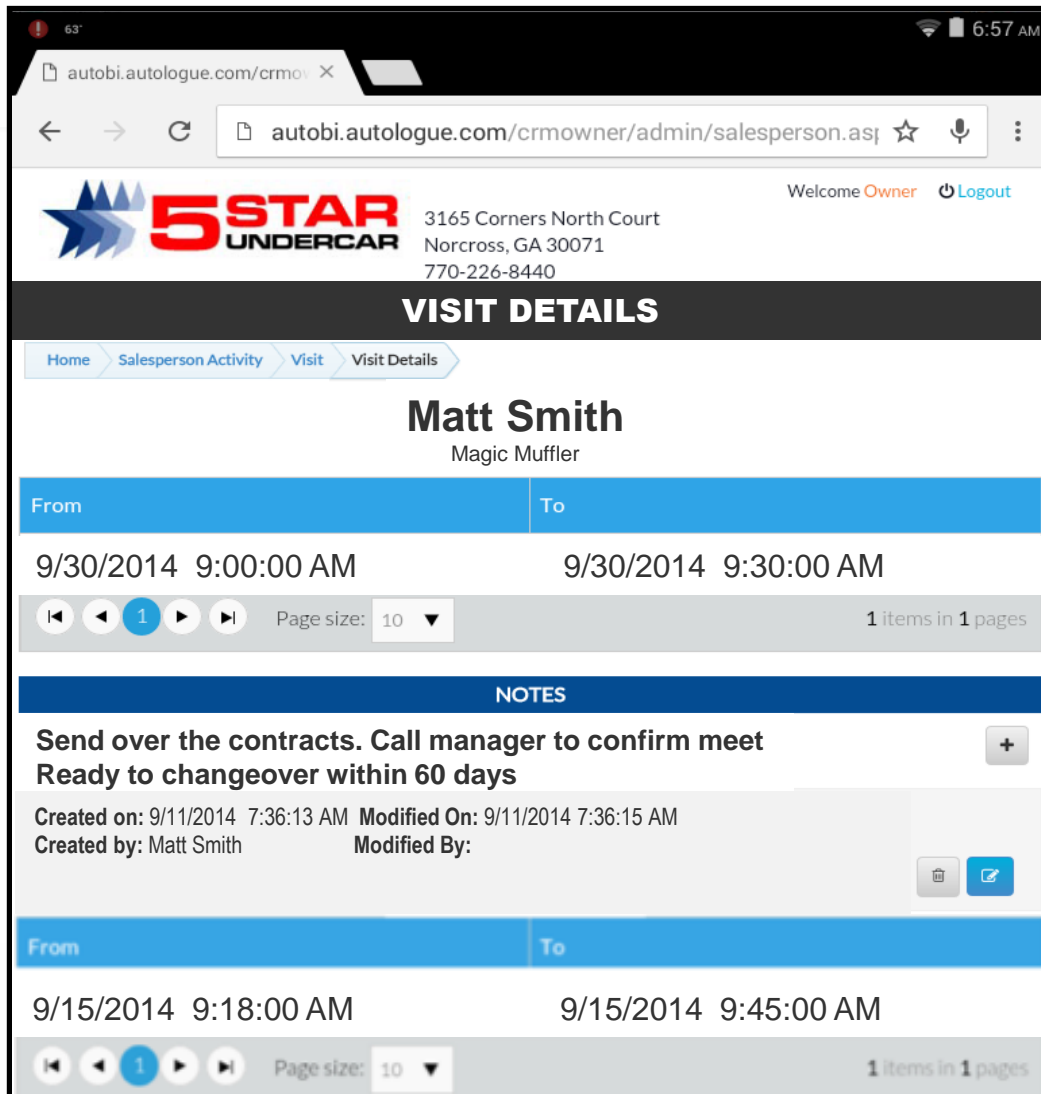
The screenshot shows a mobile application interface for 'AUTOPARTS'. At the top, there is a header with the company logo, address (8452 Commonwealth Ave, Buena Park, CA), phone number (800.722.1113), fax number (Fax 888.248.1003), and a 'Welcome Administrator' message with a 'Logout' button. Below the header is a 'PHONE CALLS' section. Under this section, there are two tabs: 'Salesperson Activity' and 'Phone Calls'. The 'Phone Calls' tab is selected, and the name 'John Doe' is displayed. Below the name is a table with three columns: 'ID', 'Customer', and 'Phone Calls'. The table contains five rows of data, including a 'Total' row at the bottom.

| ◆ID | ◆Customer | ◆Phone Calls |
|-------|-----------|--------------|
| 58 | Skeeters | 2 |
| 58 | Chucks | 5 |
| 58 | Alex | 8 |
| 58 | Preferred | 12 |
| Total | | 27 |

View **ALL**
Calls for a
Salesperson by
Customer



Calls with Notes



63° 6:57 AM

autobi.autologue.com/crmowner/admin/salesperson.aspx

Welcome Owner Logout

5STAR UNDERCAR 3165 Corners North Court
Norcross, GA 30071
770-226-8440

VISIT DETAILS

Home Salesperson Activity Visit Visit Details

Matt Smith

Magic Muffler

| From | To |
|----------------------|----------------------|
| 9/30/2014 9:00:00 AM | 9/30/2014 9:30:00 AM |

Page size: 10 1 items in 1 pages

NOTES

Send over the contracts. Call manager to confirm meet Ready to changeover within 60 days

Created on: 9/11/2014 7:36:13 AM Modified On: 9/11/2014 7:36:15 AM
Created by: Matt Smith Modified By:

| From | To |
|----------------------|----------------------|
| 9/15/2014 9:18:00 AM | 9/15/2014 9:45:00 AM |

Page size: 10 1 items in 1 pages



Salesperson Schedules

The screenshot shows a web application for 'AUTOPARTS'. The header includes the company logo, address (8452 Commonwealth Ave, Buena Park, CA), phone (800.722.1113), fax (888.248.1003), and a user greeting 'Welcome Administrator' with a 'Logout' button. The main title is 'SALESPERSON SCHEDULE'. Below this, there's a 'Salesperson' dropdown menu showing '3 items checked'. The checked items are: '#1 DECATUR PRO AUTO LAW HWY' (unchecked), '155 AUTOMOTIVE' (checked), 'A&T TOWING & SERVICE CENTER' (checked), and 'AFTER DARK MUFFLER & BRAKE' (checked). A 'Search' button is to the right. Below the dropdown is a calendar for 'December'. The calendar has tabs for 'today', 'Day', 'Week', 'Month', and 'Timeline'. The 'Month' tab is selected. The calendar grid shows dates from 01 Jun to 28. Two specific events are highlighted: 'Subject: Alex's Garage Meeting 3 PM' on Friday, June 6th, and 'Subject: Alex's Garage Meeting 2 PM' on Wednesday, June 11th.

AUTOPARTS 8452 Commonwealth Ave
Buena Park, CA
800.722.1113
Fax 888.248.1003

Welcome Administrator | Logout

SALESPERSON SCHEDULE

Salesperson 3 items checked

- ☐ #1 DECATUR PRO AUTO LAW HWY
- ☒ 155 AUTOMOTIVE
- ☒ A&T TOWING & SERVICE CENTER
- ☒ AFTER DARK MUFFLER & BRAKE

Search

today December Day Week Month Timeline

| Sun | Mon | Tue | Wed | Thu | Fri | Sat |
|--------|-----|-----|--|-----|---|-----|
| 01 Jun | 2 | 3 | 4 | 5 | 6 <i>Subject: Alex's Garage Meeting 3 PM</i> | 7 |
| 8 | 9 | 10 | 11 <i>Subject: Alex's Garage Meeting 2 PM</i> | 12 | 13 | 14 |
| 15 | 16 | 17 | 18 | 19 | 20 | 21 |
| 22 | 23 | 24 | 25 | 26 | 27 | 28 |

View **ALL**
Appointments
on Schedule for
Any and All
Salespeople

Track **ALL**
Salespeople
for a Day,
Week or
Month



Search Customer Info

autobi.autologue.com/crmowner/admin/CustomerReport

AUTOPARTS 8452 Commonwealth Ave
Buena Park, CA
800.722.1113
Fax 888.248.1003

Welcome Owner Logout

CUSTOMER REPORTS

Home Customer Reports

Salesperson **Steve Gill** Search in **Sports** Search for **Lakers**

| Code | Name | Sports |
|------|--------------------------|--------|
| 251 | ALEX'S GARAGE | Lakers |
| 252 | CHUCKS AUTOMOTIVE REPAIR | Lakers |
| 254 | SKEETERS AUTOMOTIVE | Lakers |
| 255 | DENNIS DAVID | Lakers |
| 251 | ALEX'S GARAGE | Lakers |
| 252 | CHUCKS AUTOMOTIVE REPAIR | Lakers |
| 254 | SKEETERS AUTOMOTIVE | Lakers |

Search Customer Information by Individual Field Entry (i.e., Favorite Sports, Hobbies, Birthdays-Spouse, or Children, Anniversaries, Business Type, Hours, etc.)



Let's Set Up • Define Users

Define Users and Roles

Do not use single or double quotes in the names.
Blank the Name to remove from the table.

Please "Submit" to save changes.

Submit

Master ID for
Users:

| Name | Password | Code | Role |
|------------|------------|------|----------------|
| Admin | ADMIN | | Administration |
| Counter | COUNTER | | Counter |
| Purchasing | PURCHASING | | Purchasing |
| Steve Gill | STEVE | S | Sale |
| Jim Franco | JIM | | Sale |
| | | | Not |

Submit

Created on: 9/12/2014 3:36:17 AM Modified On: 9/30/2014 9:05:15 AM

Talked to Alex about his returns

Created On: 9:15:53 AM 10:40:53 AM Modified On: 9:20:30 AM 9:05:05 AM

Getting Started

- Define Users
- Customer List by Salesman

Please "Submit" to save changes.

Submit

| Customer Number | Store Id | Password | Click to login |
|-----------------|----------|----------|----------------|
| 1 | ACSSALES | TEST | Connect |
| 251 | ACSSALES | MAGIC | Connect |
| 252 | ACSSALES | TEST | Connect |
| 254 | ACSSALES | TEST | Connect |
| 255 | ACSSALES | PASSWORD | Connect |

Alert Setup & Notifications

AUTOPARTS 8452 Commonwealth Ave
Buena Park, CA
800.722.1113
Fax 888.248.1003

Welcome Steve Gill Logout

ALERT SET UP & NOTIFICATIONS

Not Purchasing

Priority High ▼

Customers with sales greater than \$ 50 during the last 30 days that have not purchased in 2 days

☒ All Salesmen

Admin ▼ Add new salesman

Below Average

Priority Med ▼

Customers 5 % below their daily average for 30 days compared to the last 120 days

☒ All Salesmen

Admin ▼ Add new salesman

Over Returns

Priority High ▼

Customers with over 10 % returns of their purchase for each of the last 90 days

☒ All Salesmen

Admin ▼ Add new salesman

Submit

(Setup Continued)

Alert Setup

- User Defined
- By Salesperson or group

Notifications

- Free Form text field from Management



Business Intelligence Tools are Key To Increase Profits

- Increase sales using “**fact-based**” **selling tools**
- **Build profits** by targeting profitable activities
- Increase customer loyalty and **retain customers** for life
- **Increase the accuracy** and timeliness of sales forecasts
- **Achieve** budgeted sales
- Increase the proportion of high-value customers in your customer mix
- **Deploy** higher-yield promotions and advertising
- **Predict** future behavior of customers

***DESIGNED BY THE PROS
USED BY THE PROS***





We are committed to your Success.

For more information about our  PRODUCTS

Visit us at www.autologue.com

800.722.1113 | 800.962.0358