



## **MEMBER AREA USER'S GUIDE**

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**Release 1.00**

dealerVoice Marketing Technologies Inc.  
[www.dealervoices.com](http://www.dealervoices.com)

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## INTRODUCTION

This document describes the features and operation of the hosted DealerVoice Member Area which is a web portal accessible to all registered dealerVoice customers using a web browser and internet connection. We recommend using Internet Explorer 7 or higher and a high speed internet connection. You will receive an e-mail from dealerVoice that contains your login User Name and Password once your account has been configured for member access. The Members Area allows reviewing of the configuration of your dealerVoice system applications, playing of audio recordings, viewing of ROI performance data and charts (by year or twelve month rolling average) and many other useful tools.

## LOGIN

Access to the dealerVoice Members Area is via the home page of the dealerVoice web site [www.dealervoic.com](http://www.dealervoic.com). Click the Members link as shown here.



The screenshot shows the DealerVoice Marketing Technologies website. At the top, there is a navigation bar with links for [FAQ](#), [Reports](#), [Testimonials](#), [Brochure](#), and [Contact](#). Below the navigation bar, the main content area features a puzzle piece icon and a welcome message. A yellow arrow points to the [Members](#) link in the left-hand navigation menu.

**dealerVoice**  
MARKETING TECHNOLOGIES

FAQ Reports Testimonials Brochure Contact

» [Home](#)  
[About](#)  
[Product](#)  
[Features](#)  
[Quality](#)  
[Members](#)

*Advanced Customer Contact Management Systems for the Automotive Dealership*

**Welcome** to a complete and innovative solution for daily communication with your customers.

With years of practical dealership experience, DealerVoice Marketing Technologies has wrestled with the same customer contact issues as you; dealership service marketing does not always give full value for the money. This forces your mainstay business to support increasingly resource hungry, expensive and inefficient contact strategies.

Experts with impressive communications credentials and buzz words further cloud a

Click the Members Link

Enter your User Name and Password in the Member Login section of the dealerVoice Members Area page as shown. Click the red Log In button to load your default Configuration Information grid page.

Home Configuration Contact Manager Support Request FAQ Administration

## dealerVoice Members Area

**Member Login**

User Name:

Password:

Remember me.

**Log In**

[You are not logged in](#)

**Featured Products**

Product Name	Price	Stock
Product 1	\$100	10
Product 2	\$200	5
Product 3	\$300	15
Product 4	\$400	8
Product 5	\$500	12

More Call Types. [Read More >](#)

Custom HTML Auto Follow-up e-mails. [See Example >](#)

**Welcome**

Access to the Members Area requires a valid login name and password. Please login using the text boxes in the upper left corner of this page using your dealerVoice assigned User Name and Password. Administration is only available to those with site administration privileges.

Thank you.

[Return to the dealerVoice web site Home Page](#)

**Members Area**

You are logged in as  
 Brian Gibson

[Logout of members area](#)

After you log in your User Name will appear in the top left corner of every page that you view until you click the *Logout of member's area* link or close the browser window as shown on the left.

If you enter an incorrect User Name or Password you will be prompted to try again as shown on the right.

**Member Login**

User Name:

Password:

Remember me.

Your login attempt was not successful. Please try again.

**Log In**

[You are not logged in](#)

Click here to log out

## CONFIGURATION INFORMATION

The Configuration Information page provides an in-depth review of the dealerVoice server by System, Store and Application. If you have multiple Systems or Stores they can be reviewed individually using the drop down lists on the top of the page. Applications may be filtered using the four different views provided. Performance data will be displayed by year or as a rolling last 12 months summary. Links at the top right of the page will open a new Window containing a detailed ROI report and the text copy of the Voice Scripts.


The screenshot shows the 'dealerVoice Configuration Information' page. At the top, there is a navigation bar with links: Home, Configuration, Contact Manager, Support, FAQ, and Administration. The main heading is 'dealerVoice Configuration Information'. Below this, there are three dropdown menus: 'System:' set to 'Anytown Motors' (with '1203' next to it), 'Store:' set to 'Westside Branch' (with '0101' next to it), and 'Year:' set to '2009'. To the right of these dropdowns is a 'View:' dropdown set to 'Administration'. Further right, there are two links: 'View ROI Report' and 'View Voice Script'. Below the dropdowns is a table with columns: App#, Description, Audio, Email, Key Options, Calls, Hrs, HostCount, DvCount, Calls, Customers, RO's, RO Dollars, and Chart. The first row of data shows: 151, Apts - Rep, [Play], [View], 14\*#, 10:00/20, 10, 9, 733, 733, 837, \$254,107.65, and a chart icon. Four callout boxes provide additional information:

- Top-left callout: "These dropdown lists will be enabled for users with multi-system and/or multi-store access"
- Top-right callout: "Click these Links to view ROI Report or Voice Scripts (See page 10)"
- Bottom-left callout: "Choose any year or the last 12 months filter option for ROI (See page 8)"
- Bottom-right callout: "Choose from (4) four different filtered views:
  - Default
  - Administration
  - Merchandising
  - Show All
 (See page 8)"

You may listen to the main audio file or view the email message associated with each application. If you have a French audio recording it will appear as an additional Audio2 column between the Audio and Email columns. This is a sample grid display based on the Administration view. Totals are provided for many columns in the footer of the grid.

Click the Play button to hear Audio file or View button to see Email (See page 9)

Hover cursor over these columns to see detailed Key Options and Calling Hours (See page 8)

App#	Description	Audio	Email	Key Options	Calling Hrs	EstCount	DvCount	Calls	Customers	RO's	RO Dollars	Chart
151	Appts - Reminders	Play	View	14*#	10:00/20:00	10	9	733	733	837	\$254,107.65	
211	Parts Arrived	Play	View	14*#	10:00/20:00	26	8	383	223	219	\$67,204.79	
301	CSI-14days-R	Play	View	4*#	16:00/20:00	62	48	547	547	194	\$50,786.39	
302	CSI-14days-C	Play	View	4*#	16:00/20:00	1	1	503	503	198	\$51,238.16	
303	CSI-14days-F	Play	View	4*#	16:00/20:00	30	26	211	211	96	\$22,432.74	
311	CSI-14days-B	Play	View	4*#	16:00/20:00	156	37	89	89	52	\$14,633.32	
321	CSI-CP-B	Play	View	1247*#	16:00/20:00	212	96	1973	1895	549	\$148,342.80	
571	Letter Followup -7	Play	View	14*#	10:00/20:00	82	78	977	977	217	\$52,571.76	
581	Letter Followup +7	Play	View	14*#	10:00/20:00	88	82	881	881	165	\$39,177.44	
591	Letter Followup +49	Play	View	14*#	10:00/20:00	26	24	916	916	141	\$33,693.00	
<b>Totals:</b>						<b>693</b>	<b>409</b>	<b>7213</b>		<b>2668</b>	<b>\$1,676.15</b>	

Print Grid

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Click to Print Grid

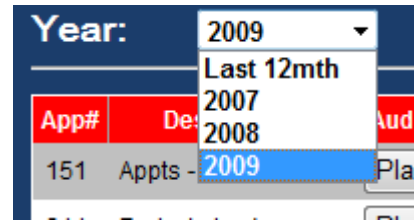
Click to display 3D Charts (See page 11)

## COLUMN DEFINITIONS

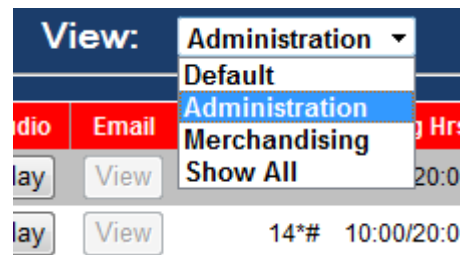
There are thirteen (or fourteen for French systems) columns of buttons and information on the Configuration Information grid. The following table defines each column.

<b>Column Title</b>	<b>Definition</b>
App#	The dealerVoice application number.
Description	The application description.
Audio	Play button to listen to live answer audio file.
Audio2	Play button to listen to live answer audio file of an optional language. Only visible when used.
Email	View button to see text or HTML email file.
Key Options	Telephone keypad options (hover cursor to see info)
Calling Hrs	Calling hours (hover to see detail by day of week)
Host Count	The number of customer records extracted from the DMS system for the prior business day.
DvCount	The number of customers being tracked by dealerVoice. It will equal the Host Count minus any customers already being tracked or blocked by lower numbered dealerVoice applications.
Calls	The number of calls made during the Year selected.
Customers	Actual customers called during the Year selected.
RO's	The number of RO's generated during the Year selected.
RO Dollars	The RO dollars generated during the Year selected.
Chart	Chart icon to display 3D performance graphs.
<b>Footer</b>	Totals for numeric data columns displayed.

The Selection controls on the Configuration Information page will be grayed out if they are disabled. For example if you only have one system or store configured then the System and Store drop down lists will be disabled. The Year selector has multiple year values listed. Selecting a specific year will give year-to-date totals for HostCount, DvCount, Calls, Customers, RO's and RO Dollars on the grid. It will also show year-to-date totals on the 3D charts. If you prefer to see a running twelve month view you may select the Last 12mth option in the Year selector.



The View selector has four options. The default view lists all actively calling applications. Alternatively you can filter the list to show just Administrative, Merchandising or All (including non-active) applications. The grid will update automatically each time you select a different Store, Year or View.



16:00/20:00	62	48	547
16:00/20:00	1	503	
16:00/20:00	6	211	
16:00/20:00	7	89	
16:00/20:00	6	1973	
10:00/20:00	8	977	
10:00/20:00	2	881	
10:00/20:00	4	916	
<b>Totals:</b>	<b>693</b>	<b>409</b>	<b>7213</b>

**Daily Calling Hours**

- Mon 16:00/20:00
- Tue 16:00/20:00
- Wed 16:00/20:00
- Thu 16:00/20:00
- Fri 16:00/20:00
- Sat 16:00/17:00
- Sun 14:00/13:00

If you hover the cursor over any row in the Calling Hrs column it will display the allowable Calling Hours used by the system for that application.

Hovering the cursor over the Key Options column will provide an explanation of what each telephone Keypad option offers.

Audio	Email	Key Options	Calling Hrs	HostCount	DvCount
Play	View	14*#	10:00/20:00	15	

**Keypad Options Legend**

- 1=Record a voicemail message (VM)
- 2=Enter a YES response to question (YS)
- 3=Enter a NO response to question (NO)
- 4=Request a call back (CB)
- 5=Add me to DO-NOT-CALL list (DC)
- 7=Please call again later - driver unavailable (CA)
- 8=Wrong number - do not call again (WN)
- 9=Press to play a bilingual message
- \*=Press to end the call
- #=Press to replay the message

Play	View	14*#	10:00/20:00	113	
------	------	------	-------------	-----	--



## PLAYING AUDIO FILES

The Play buttons in the Audio column will open an audio player to listen to your main outgoing message for each application. If the button is disabled (grayed out) it means that no audio file is available for that application. French systems will have a second Audio2 column of buttons to play the French version of the audio files. Use the controls on the audio player to pause or replay the message as required. We recommend using a PC with amplified external speakers as the volume level of some recordings on the web site may be low due to WAV file conversion however the volume should be fine on your dealerVoice system.

The screenshot displays the 'dealerVoice Configuration Information' interface. At the top, there are dropdown menus for 'System: Anytown Motors', 'Store: Westside Bra...', and 'Year: 2009'. To the right, the numbers '1203' and '0101' are displayed. Below this is an audio player interface with a play button, a progress bar, and a 'Close Player' button. A callout points to the audio player controls. Below the audio player is a table with columns: App#, Description, Audio, Email, Key Options, Calling Hrs, Host, DvCount, and Calls. The table contains three rows of data. Callouts point to the 'Play' button in the Audio column of the first row, the 'View' button in the Email column of the second row, and the 'Close Player' button.

App#	Description	Audio	Email	Key Options	Calling Hrs	Host	DvCount	Calls
151	Appts - Reminders	Play	View	14*#	10:00/20:00			
211	Parts Arrived	Play	View	14*#	10:00/20:00	26	8	383
301	CSI-14days-P	Play	View	4*#	16:00/20:00	62	48	547

## VIEWING EMAIL FILES

The Play buttons in the Email column will open a window to view any outgoing text or HTML email file associated with the application. If the button is disabled (grayed out) it means that no email file is available for that application.

## ROI REPORT & VOICE SCRIPTS

The links in the top right corner of the Configuration Manager page give you access to a detailed HTML ROI report and a text copy of the Voice Scripts used by dealerVoice. If your actual Voice Scripts are not published on the site a standard version will be available.

### Sample of the ROI Report

**Anytown Motors -- dealerVoice Activity Report -- Admin Calls**  
FIRST CALL: 05/01/09 LAST CALL: 05/29/09 ACTUAL DAYS: 30 CALL DAYS: 0 WORK DAYS: 22

APPLICATION/ CALL TYPE	GOOD CALLS	REQUIRED VISITS	ATTAINED VISITS	R.O. COUNT	R.O. DOLLARS	AVG. RO\$	AVG. DAY	VISIT.RTN. RATE%	
Appts - Reminders	137	137	103	118	36,855.37	312	5.4	75.2	<a href="#">-view detail-</a>
Parts Arrived	82	48	25	29	11,109.34	383	1.3	52.1	<a href="#">-view detail-</a>
CSI-14days-R	109	109	24	29	8,371.59	289	1.3	22.0	<a href="#">-view detail-</a>
CSI-14days-C	83	83	27	30	6,434.06	214	1.4	32.5	<a href="#">-view detail-</a>
CSI-14days-F	47	47	11	13	1,809.21	139	6		<a href="#">-view detail-</a>
CSI-14days-B	31	31	7	8	1,524.84	191	6		<a href="#">-view detail-</a>
CSI-CP-B	359	348	77	91					<a href="#">-view detail-</a>
Letter Followup -7	175	175	29	32					<a href="#">-view detail-</a>
Letter Followup +7	131	131	17	22	5,910.37	269	1.0	13.0	<a href="#">-view detail-</a>
Letter Followup +49	105	105	10	17	4,053.40	238	8	9.5	<a href="#">-view detail-</a>

### Sample of the Voice Scripts

**Appointment Reminder**  
Hello. This is an automated message from Hometown Motors. We are calling to remind you that you have a service appointment for your vehicle tomorrow. Please give us a call at your earliest convenience if you need to reschedule or change your service appointment. You can reach us at 999-999-9999. To have one of our staff call you personally to discuss your service appointment, Press 4 or if you would like to leave us a voice mail, Press 1. To end this call, press star. To repeat this message, press the number sign

**Appointment No-Show**  
Hello. This is an automated message from Hometown Motors. We missed seeing you for your scheduled service appointment. Please give us a call at your earliest convenience to reschedule your appointment. You can reach us at 999-999-9999, or book your appointment on-line at www.hometown.com. To have one of our staff call you personally to discuss your service appointment, Press 4 or if you would like to leave us a voice mail, Press 1. To end this call, press star. To repeat this message, press the number sign.

**Special Order Follow-up**  
Hello. This is an automated message from Hometown Motors. We are calling to inform you that the parts ordered for your vehicle have arrived. Please give us a call at your earliest convenience to book a service appointment at 999-999-9999, or book your appointment on-line at www.hometown.com. To have one of our staff call you personally to schedule an appointment, Press 4 or if you would like to leave us a voice mail, Press 1. To end this call, press star. To repeat this message, press the number sign

**Repair Order Follow-up**  
Hello. This is an automated message from Hometown Motors. We are calling to ensure you were completely satisfied with your recent service visit. If you were completely satisfied, press 2. If you were not completely satisfied, press 4 and we will call you back

## 3D CHARTS

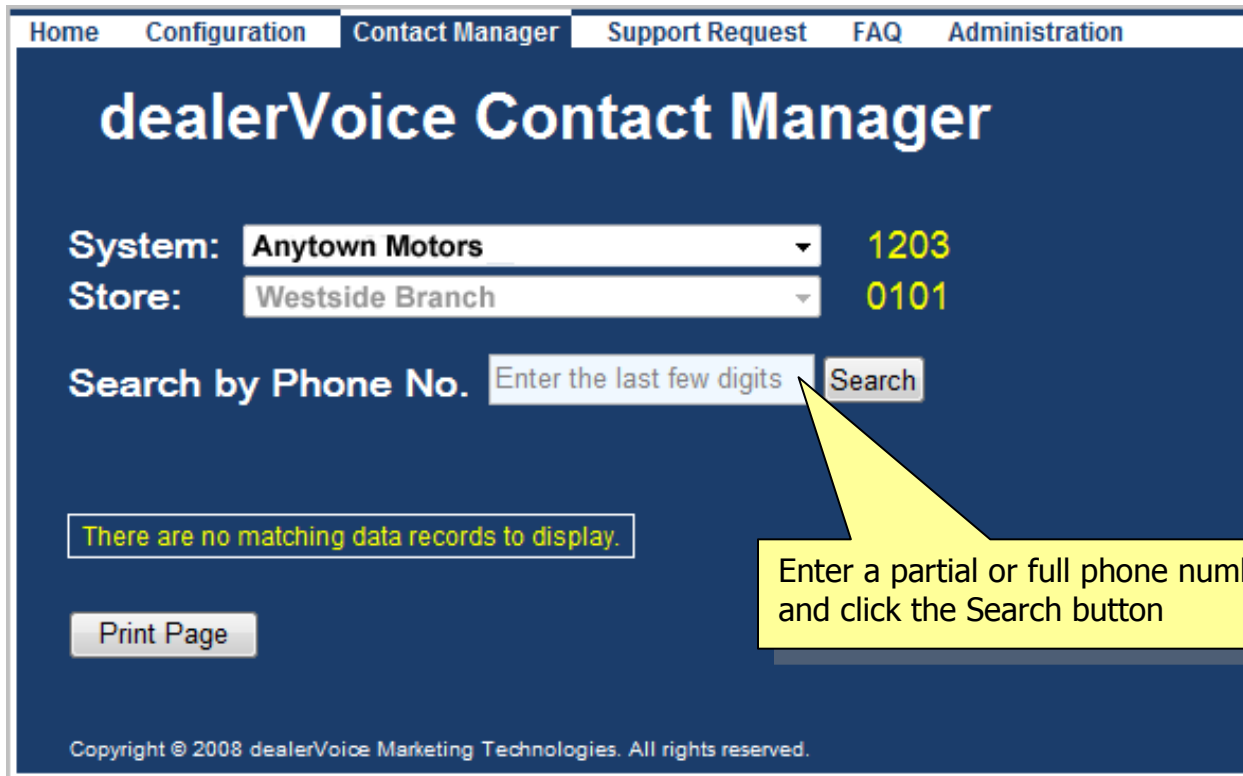
Powerful 3D performance charts are available by application and by summary for the active System, Store, Year and View selected. Click the chart icon at the far right of each application row to see four charts which include Call Activity, Customers, Repair Order Count, and Repair Order Dollars by month for the application. If you click the chart icon in the footer (totals) row you will see a chart that is a composite of all applications displayed in the current View. The first time you use the Chart option you may be asked to install Silverlight 2.0 which is a browser add-in similar to Adobe Flash. Click OK to install Silverlight which will only take a few minutes.



Click to print Charts

## CONTACT MANAGER (future release)

Click the Contact Manager tab on the Navigation Menu to review the contact log by customer phone number. This is a new (beta) application which is still under development but you will be able to use it once it is released and your system is configured. Simply type in the last few digits of the phone number you wish to review.



Home Configuration **Contact Manager** Support Request FAQ Administration

# dealerVoice Contact Manager

System: Anytown Motors 1203

Store: Westside Branch 0101

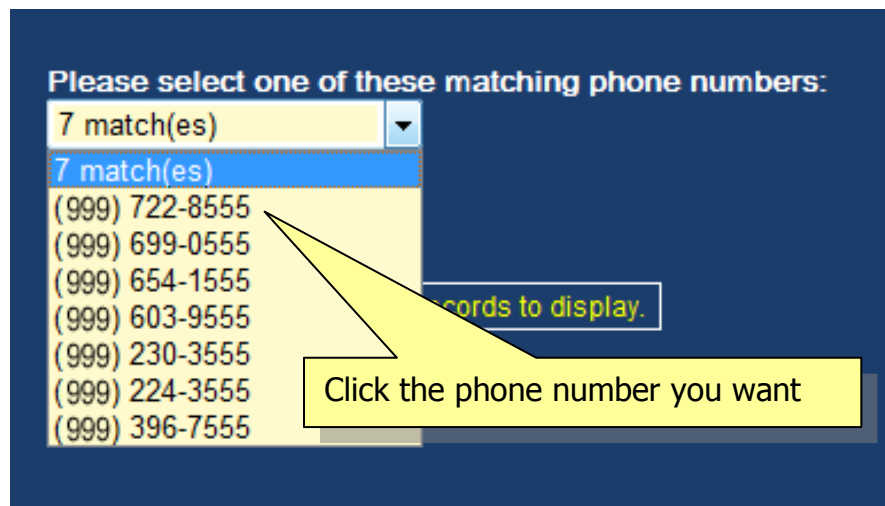
Search by Phone No. Enter the last few digits Search

There are no matching data records to display.

Print Page

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If there is more than one matching phone number a secondary listing will be displayed so you can select the number you want to review.



Please select one of these matching phone numbers:

7 match(es)

7 match(es)

(999) 722-8555

(999) 699-0555

(999) 654-1555

(999) 603-9555

(999) 230-3555

(999) 224-3555

(999) 396-7555

There are no matching data records to display.

Click the phone number you want

The contact manager grid contains a list of call activity sorted by date in ascending order. Columns included are customer number, VIN, application number, success/fail count, next call date, last call date, results code, duration, reference number and log type. The language, agent and comments columns are for future use. If there were a large number of calls to the customer then you will have navigation links in the footer row to move between pages.

Home Configuration **Contact Manager** Support Request FAQ Administration

## dealerVoice Contact Manager

System:  4201  
 Store:  0101

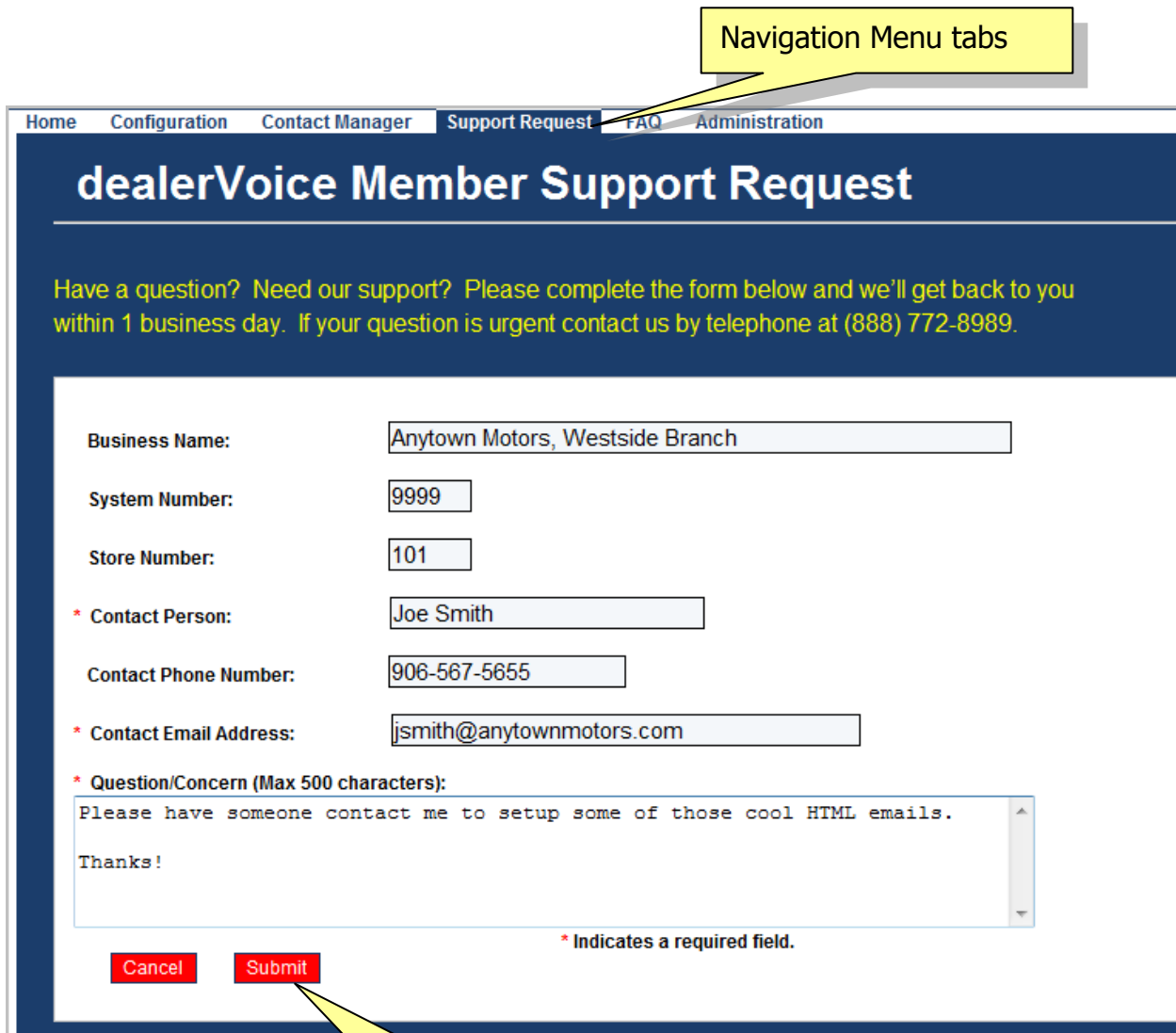
Search by Phone No.

Date	Customer#	VIN#	App#	OK Call	Bad Call	Next Call	LastCall	Results	Lang	Dur.	Ref.	LogType	Agent	Comments
5/26/2009	9110	1BK12F551278999	301	1	0	6/24/2009	5/15/2009	nb		42	57574	del		
5/25/2009	9110	1BK12F551278999	301	1	0	6/24/2009	5/15/2009	nb		42	57574	conflict 309		
5/25/2009	9110	1BK12F551278999	301	1	0	6/24/2009	5/15/2009	nb		42	57574	conflict 309		
5/23/2009	9110	1BK12F551278999	301	1	0	6/24/2009	5/15/2009	nb		42	57574	conflict 309		
5/22/2009	9110	1BK12F551278999	301	1	0	6/24/2009	5/15/2009	nb		42	57574	conflict 309		
5/22/2009	9110	1BK12F551278999	301	1	0	6/24/2009	5/15/2009	nb		42	57574	conflict 309		
5/21/2009	9110	1BK12F551278999	301	1	0	6/24/2009	5/15/2009	nb		42	57574	conflict 309		
5/21/2009	9110	1BK12F551278999	301	1	0	6/24/2009	5/15/2009	nb		42	57574	conflict 309		

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## SUPPORT REQUEST FORM

We have provided a tab on the Navigation Menu for a simple Support Request form as part of the Members Area. You may use this form to generate an email to our dealerVoice support team. Fill in the fields on the form and click the Submit button.



The screenshot shows a web browser window with a navigation menu at the top containing links for Home, Configuration, Contact Manager, Support Request, FAQ, and Administration. The 'Support Request' tab is active. Below the navigation is a dark blue header with the text 'dealerVoice Member Support Request'. A yellow callout box points to the navigation menu with the text 'Navigation Menu tabs'. Below the header is a message: 'Have a question? Need our support? Please complete the form below and we'll get back to you within 1 business day. If your question is urgent contact us by telephone at (888) 772-8989.' The form itself contains several input fields: 'Business Name' (Anytown Motors, Westside Branch), 'System Number' (9999), 'Store Number' (101), '\* Contact Person' (Joe Smith), 'Contact Phone Number' (906-567-5655), and '\* Contact Email Address' (jsmith@anytownmotors.com). A text area for '\* Question/Concern (Max 500 characters):' contains the text 'Please have someone contact me to setup some of those cool HTML emails. Thanks!'. A red asterisk indicates a required field. At the bottom of the form are 'Cancel' and 'Submit' buttons. A yellow callout box points to the 'Submit' button with the text 'Click Submit after completing the form'.

Navigation Menu tabs

Home Configuration Contact Manager Support Request FAQ Administration

### dealerVoice Member Support Request

Have a question? Need our support? Please complete the form below and we'll get back to you within 1 business day. If your question is urgent contact us by telephone at (888) 772-8989.

Business Name: Anytown Motors, Westside Branch

System Number: 9999

Store Number: 101

\* Contact Person: Joe Smith

Contact Phone Number: 906-567-5655

\* Contact Email Address: jsmith@anytownmotors.com

\* Question/Concern (Max 500 characters):  
Please have someone contact me to setup some of those cool HTML emails.  
Thanks!

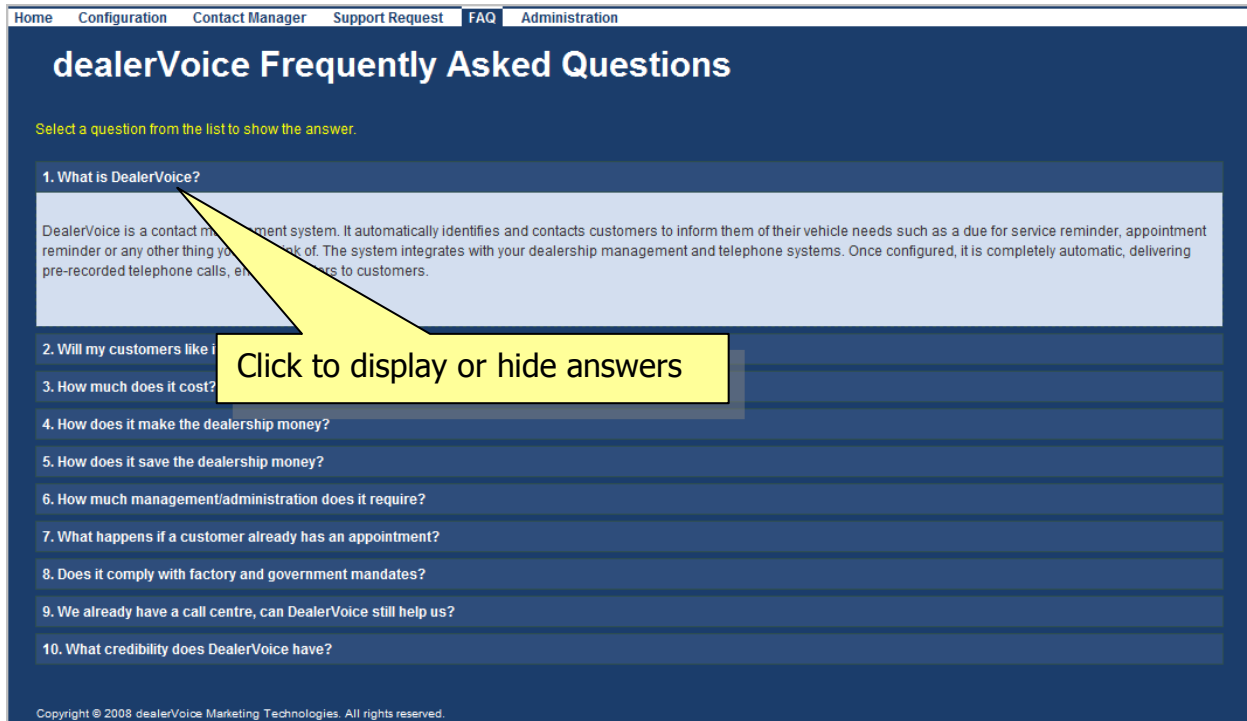
\* Indicates a required field.

Cancel Submit

Click Submit after completing the form

## FAQ (Frequently Asked Questions)

The FAQ tab on the Navigation Menu provides a list of frequently asked questions about dealerVoice. Click on any question to see the answer from dealerVoice.



Home Configuration Contact Manager Support Request **FAQ** Administration

### dealerVoice Frequently Asked Questions

Select a question from the list to show the answer.

1. What is DealerVoice?  
 DealerVoice is a contact management system. It automatically identifies and contacts customers to inform them of their vehicle needs such as a due for service reminder, appointment reminder or any other thing you want to talk of. The system integrates with your dealership management and telephone systems. Once configured, it is completely automatic, delivering pre-recorded telephone calls, emails and text messages to customers.
2. Will my customers like it?
3. How much does it cost?
4. How does it make the dealership money?
5. How does it save the dealership money?
6. How much management/administration does it require?
7. What happens if a customer already has an appointment?
8. Does it comply with factory and government mandates?
9. We already have a call centre, can DealerVoice still help us?
10. What credibility does DealerVoice have?

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## ADMINISTRATION

The Administration tab on the Navigation Menu is restricted to dealerVoice support only.

## FOR ADDITIONAL ASSISTANCE

This completes the MEMBER AREA USER'S GUIDE. If you have additional questions or require assistance, please contact dealerVoice support in Brampton at 1-888-772-1611 or 1-514-875-4811 in Quebec. Alternatively send us a Support Request form directly from the Member's Area.

**THE DEALERVOICE TEAM**