



Product Training – Day 3

Product features introduced in the latest Product version

Products Landscape for an Automotive Retailer

Interact digitally

Digital Marketing

Omni-Channel Campaigns

- Personalized and account-based Sales & Marketing Campaigns
- ✓ Call Center
- ✓ SMS / Whatsapp / Viber
- ✓ Newsletter
- ✓ Facebook ads

Digital Engagement

Co-browsing

- ✓ Screen sharing
- ✓ Video and voice chat
- ✓ Secure Messenger
- ✓ Share document
- ✓ Drawing mode

Virtual showroom

- ✓ Virtual presentation of the showroom vehicles
- ✓ Lead-creation
- ✓ Price tags

Digital Presence

My Site

- ✓ Promo Pages
- ✓ Test Drives
- ✓ Car Configurators
- ✓ Car Inventory
- ✓ Centralized Website-Management

My Account

- ✓ Personalized customer portal
- ✓ Seamless customer-communication
- ✓ Self-managing customers

Site Adapter

- ✓ Create Inquiries and Leads from any importer's or retailer's internet site
- ✓ Create Inquiries and Leads from independent automotive interest sites (i.e. Mobil.de, etc..)

Sale efficiently

Digital Sales

Digital Sales Workplace

- ✓ Sales & Lead Management
- ✓ Customer 360 view
- ✓ Running on all devices (mobile, tablet, PC/Laptop)
- ✓ AI-support
- ✓ Web-based platform

Key Supplement Products

Product Configurators

- ✓ Light Configurator
- ✓ Advanced Configurator

Used Car Evaluation

- ✓ OD Evaluation
- ✓ DAT
- ✓ 2TRDE

Car Purchasing

- ✓ Purchase Lead
- ✓ Purchase documents management
- ✓ Used Car Hand-over

Complaint Management

- ✓ End-to-End Customer Complaints Management
- ✓ Digital Communication
- ✓ Escalation process

....and more

- ✓ Manage Sales Process via Workflow
- ✓ Smart Templates for notifications and documents
- ✓ Office 365 Outlook OneDealer Add-In
- ✓ Customizable work-place (dashboards per role)
- ✓ Market Place Integration (TwoS)

Transact with minimum TCO

Cloud Services

- ✓ Office 365
- ✓ Mobile Device Management
- ✓ SAP Cloud
- ✓ Amazon Cloud
- ✓ Azure

SAP Backbone Platform

OneDealer Backbone

- ✓ SAP HANA
- ✓ SAP Business Objects

Integration Layer

- ✓ Configurable end-points
- ✓ Interfaces with OEM backbone systems
- ✓ Interface with ERP systems
- ✓ Interface with Dealer Management Systems
- ✓ Interface with 3rd Party systems

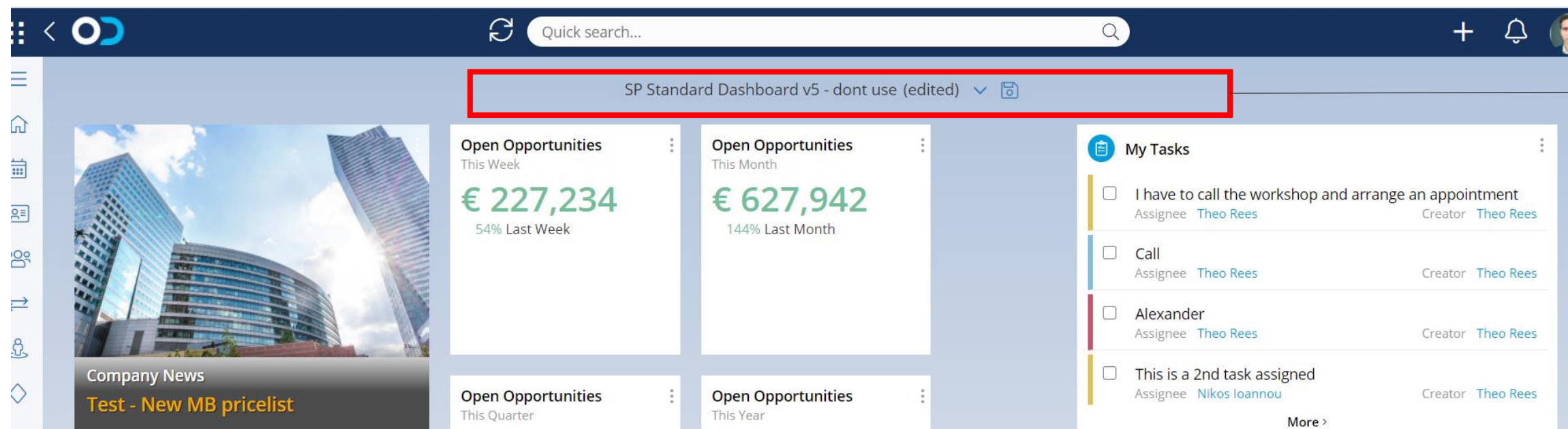
Big Data & Analytics

- ✓ Reporting and Management Support System
- ✓ Predictions
- One Dealer Analytics**
- Social Analytics**
- ✓ Social KPIs

Multi-dashboards

Feature description

Multi-dashboards is a very important feature that gives the possibility to a user to have more than one dashboards available and adjust his workplace based on his needs. Depending on his rights, the user can adjust, re-order the available widgets, add or delete widgets and then save his dashboard with a unique name. When logging in the system the user can select at any time with which dashboard he wants to work with. A dashboard can be also created as Global and it is possible to be selected by anybody.



Select Dashboard from the available ones

Dashboards in the standard blueprint

- Call Center Agent
- Call Center Manager
- Sales Advisor
- Sales Manager
- Sales Marketing
- Sales Analytics

Vehicle Reservation

Feature description

Any vehicle in the dealership's inventory can be reserved for a specific period and a specific reason (i.e. Test drive, or Scheduled maintenance, etc...)

The active reservations as well as the reservation history is available for each vehicle

Benefit

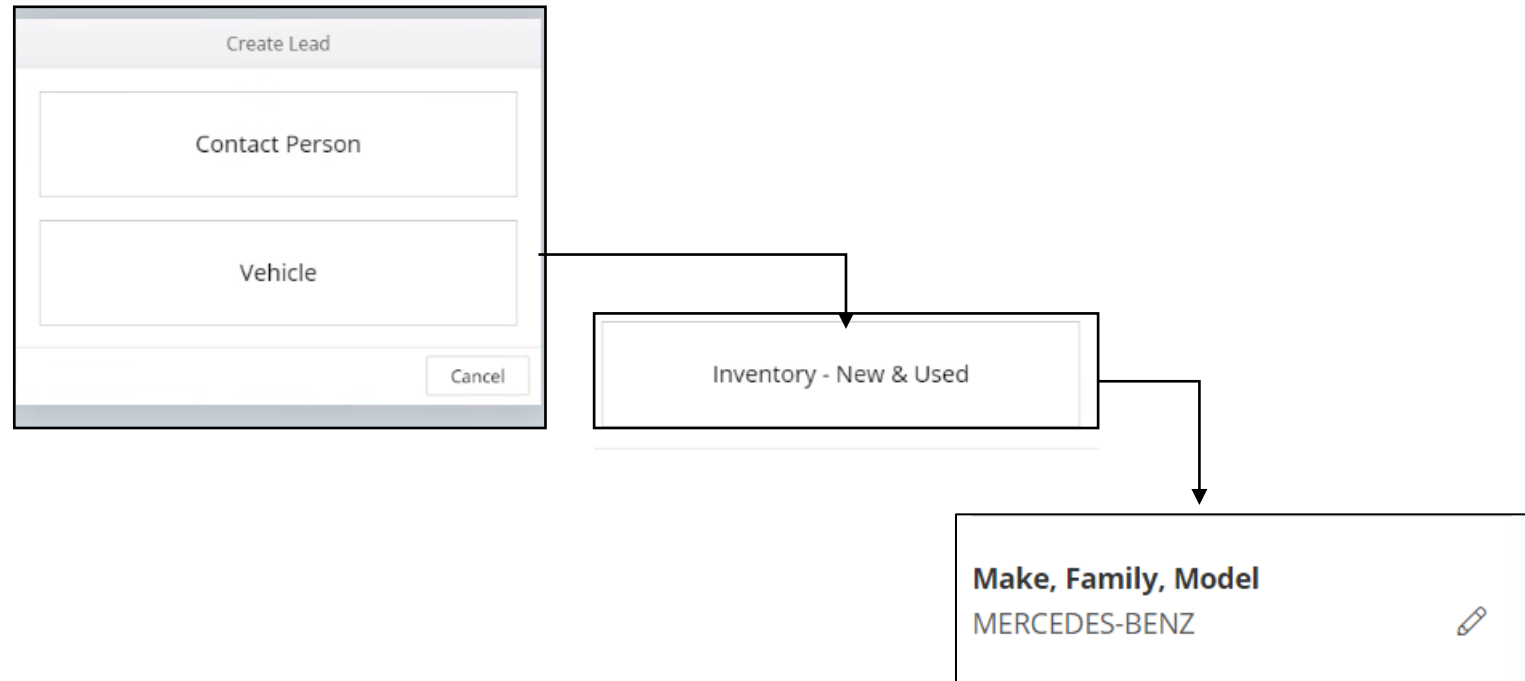
Offers efficiency and transparency within the dealership with regards to the availability of test drives, or dealership's own vehicles

The screenshot displays the OneDealer interface for a vehicle reservation. The top part shows the 'Reserve Vehicle' form for a TOYOTA LandCruiser Legent Plus 2.8L Diesel 28D- (177 HP) SUV 5 doors. The form includes fields for 'Schedule Reservation Start Date' (06/11/2020), 'Schedule Reservation End Date' (10/11/2020), 'Contact Person' (Duerr Lukas), and 'Reservation Type' (Courtesy). The bottom part shows the 'Active Reservations' table for the same vehicle, with one reservation listed. The bottom-most part shows the 'Reservation History' table, which lists three past reservations.

Start Reservation Date	End Reservation Date	Reservation Type	Reservation reason	Business Partner
06/11/2020	10/11/2020		Needs a long service	Duerr Lukas

Reservation Type	Reservation reason	VIN	Model Family	Model Name	License Number	BP Email	BP Name	User Name	Reservation Start Date	Reservation End Date
Test drive		WMEEJ3BA1DK954231	C453	fortwo Coupe Electric Drive	JHY98789	maximilianfleischer@mailinator.com	Fleischer Maximilian	Theo Rees	30/12/2019	30/12/2019
Test drive		WMEEJ3BA1DK954231	C453	fortwo Coupe Electric Drive	JHY98789	apapargiris@me.com	Papargiris Anastasios	Theo Rees	15/01/2020	15/01/2020
Test drive		WMEEJ3BA1DK954231	C453	fortwo Coupe Electric Drive	JHY98789	martinfoerster@mailinator.com	Foerster Martin	Theo Rees	17/09/2020	17/09/2020

Additional filters in the vehicle inventory Grid list



Feature description

The filters of Make, Family and Model have been added for the vehicles inventory grid-list to narrow down the list of the available used and new vehicles

Inventory Vehicles
Found 3 entries

Actions

Status: New Vehicle, Used Vehicle ✕ | Model Tree: MERCEDES-BENZ ✕

Active VOIs	Photo	Make	Model	VIN	License Number	Fuel Type	Vehicle Availability	Status	VAT Reclaimable	Total P
0		MERCEDES-BENZ	C 350 e T-Modell	WDB2030451A427785	MOM 5349	Hybrid (diesel/electric)		New Vehicle	N	select
1		MERCEDES-BENZ	GLC 350 e 4MATIC Coupe 2017	WDZPE8CC1E5822031	JUN8238	Hybrid (diesel/electric)		New Vehicle	N	select
0		MERCEDES-BENZ	GLC 350 e 4MATIC 2017	WDBRH81J04F456541	PP92722	Hybrid (diesel/electric)		New Vehicle	N	select

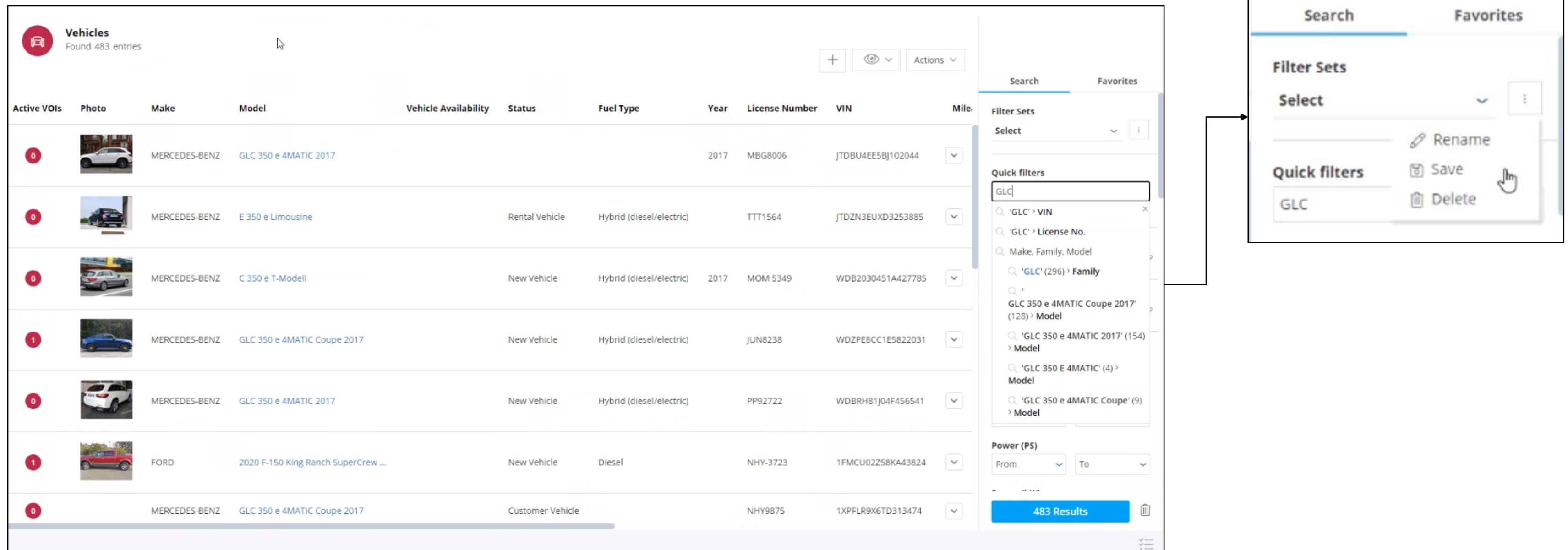
Quick Filtering in Vehicles Grid list

Product feature

In the vehicles grid list a very important feature is added that gives the possibility of filtering by using a search box. The user can type the complete or part of a text and all possible locations in the grid list that the specific text is found are displayed. The search can be also saved for future use.

Benefit

Facilitates the user in finding in an efficient manner the vehicle he is looking for.



The screenshot displays a 'Vehicles' grid list with 483 entries. The grid columns include Active VOIs, Photo, Make, Model, Vehicle Availability, Status, Fuel Type, Year, License Number, VIN, and Mileage. A search filter overlay is active on the right side, showing a search box with 'GLC' entered. Below the search box, a list of quick filters is shown, including 'GLC' > VIN, 'GLC' > License No., Make, Family, Model, 'GLC' (296) > Family, 'GLC 350 e 4MATIC Coupe 2017' (128) > Model, 'GLC 350 e 4MATIC 2017' (154) > Model, 'GLC 350 E 4MATIC' (4) > Model, and 'GLC 350 e 4MATIC Coupe' (9) > Model. The overlay also features a 'Filter Sets' section with a 'Select' dropdown and a 'Quick filters' section with a 'GLC' filter. At the bottom of the overlay, there are 'Rename', 'Save', and 'Delete' options. A 'Power (PS)' section with 'From' and 'To' dropdowns is also visible. The bottom of the overlay shows '483 Results' and a trash icon.

Active VOIs	Photo	Make	Model	Vehicle Availability	Status	Fuel Type	Year	License Number	VIN	Mile.
0		MERCEDES-BENZ	GLC 350 e 4MATIC 2017				2017	MBG8006	JTDBU4EE5BJ102044	
0		MERCEDES-BENZ	E 350 e Limousine		Rental Vehicle	Hybrid (diesel/electric)		TTT1564	JTDZN3EUXD3253885	
0		MERCEDES-BENZ	C 350 e T-Modell		New Vehicle	Hybrid (diesel/electric)	2017	MOM 5349	WDB2030451A427785	
1		MERCEDES-BENZ	GLC 350 e 4MATIC Coupe 2017		New Vehicle	Hybrid (diesel/electric)		JUN8238	WDZPE8CC1E5822031	
0		MERCEDES-BENZ	GLC 350 e 4MATIC 2017		New Vehicle	Hybrid (diesel/electric)		PP92722	WDBRH81J04F456541	
1		FORD	2020 F-150 King Ranch SuperCrew ...		New Vehicle	Diesel		NHY-3723	1FMCU02Z58KA43824	
0		MERCEDES-BENZ	GLC 350 e 4MATIC Coupe 2017		Customer Vehicle			NHY9875	1XPFLR9X6TD313474	

Active VOIs

A very important feature is introduced that counts active leads / opportunities for each vehicle in the inventory of the dealership (new / used)

The screenshot displays a web application interface for vehicle management. At the top left, there is a 'Vehicles' header with a car icon and the text 'Found 483 entries'. Below this is a table with the following columns: Active VOIs, Photo, Make, Model, Vehicle Availability, Status, Fuel Type, Year, License Number, VIN, and Mile. The 'Active VOIs' column contains red circles with white numbers representing the count of active leads for each vehicle. A dashed box highlights this column and the first seven rows of the table. The first row shows a Mercedes-Benz GLC 350 e 4MATIC 2017 with 0 active VOIs. The second row shows a Mercedes-Benz E 350 e Limousine with 0 active VOIs. The third row shows a Mercedes-Benz C 350 e T-Modell with 0 active VOIs. The fourth row shows a Mercedes-Benz GLC 350 e 4MATIC Coupe 2017 with 1 active VOI. The fifth row shows a Mercedes-Benz GLC 350 e 4MATIC 2017 with 0 active VOIs. The sixth row shows a Ford 2020 F-150 King Ranch SuperCrew with 1 active VOI. The seventh row shows a Mercedes-Benz GLC 350 e 4MATIC Coupe 2017 with 0 active VOIs. On the right side, there is a sidebar with 'Search' and 'Favorites' tabs. Under 'Search', there is a 'Filter Sets' section with a 'Select' dropdown. Below that is a 'Quick filters' section with a search input field containing 'GLC'. Below the search input, there are several filter suggestions: 'GLC' > VIN, 'GLC' > License No., Make, Family, Model, 'GLC' (296) > Family, 'GLC 350 e 4MATIC Coupe 2017' (128) > Model, 'GLC 350 e 4MATIC 2017' (154) > Model, 'GLC 350 E 4MATIC' (4) > Model, and 'GLC 350 e 4MATIC Coupe' (9) > Model. At the bottom of the sidebar, there is a 'Power (PS)' section with 'From' and 'To' dropdowns. At the very bottom of the sidebar, there is a blue button labeled '483 Results' and a trash icon.

Active VOIs	Photo	Make	Model	Vehicle Availability	Status	Fuel Type	Year	License Number	VIN	Mile.
0		MERCEDES-BENZ	GLC 350 e 4MATIC 2017				2017	MBG8006	JTDBU4EE5BJ102044	
0		MERCEDES-BENZ	E 350 e Limousine		Rental Vehicle	Hybrid (diesel/electric)		TTT1564	JTDZN3EUXD3253885	
0		MERCEDES-BENZ	C 350 e T-Modell		New Vehicle	Hybrid (diesel/electric)	2017	MOM 5349	WDB2030451A427785	
1		MERCEDES-BENZ	GLC 350 e 4MATIC Coupe 2017		New Vehicle	Hybrid (diesel/electric)		JUN8238	WDZPE8CC1E5822031	
0		MERCEDES-BENZ	GLC 350 e 4MATIC 2017		New Vehicle	Hybrid (diesel/electric)		PP92722	WDBRH81J04F456541	
1		FORD	2020 F-150 King Ranch SuperCrew ...		New Vehicle	Diesel		NHY-3723	1FMCU0ZZ58KA43824	
0		MERCEDES-BENZ	GLC 350 e 4MATIC Coupe 2017		Customer Vehicle			NHY9875	1XPFLR9X6TD313474	

Overdue activities (new widget)



Overdue Activities

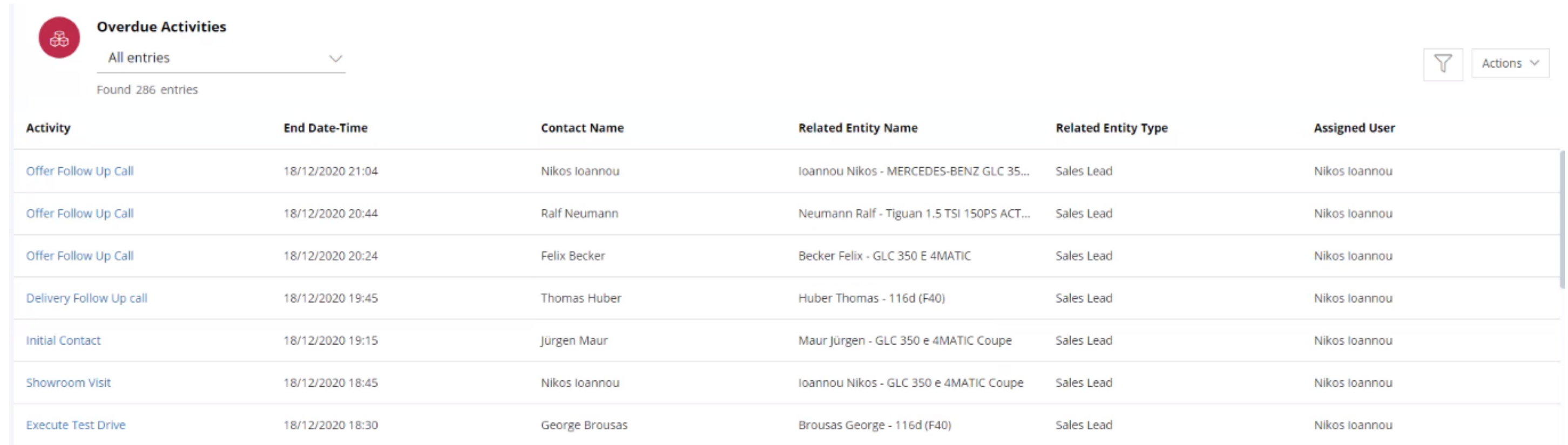
Activity	Due date
Offer Follow Up Call Nikos Ioannou	18/12/2020 21:04
Offer Follow Up Call Ralf Neumann	18/12/2020 20:44
Offer Follow Up Call Felix Becker	18/12/2020 20:24

[More >](#)

Feature description

An additional feature to monitor more effectively the planned activities for the sales department.

The widget lists all planned activities where the planned date is older than the current date.



Overdue Activities

All entries

Found 286 entries

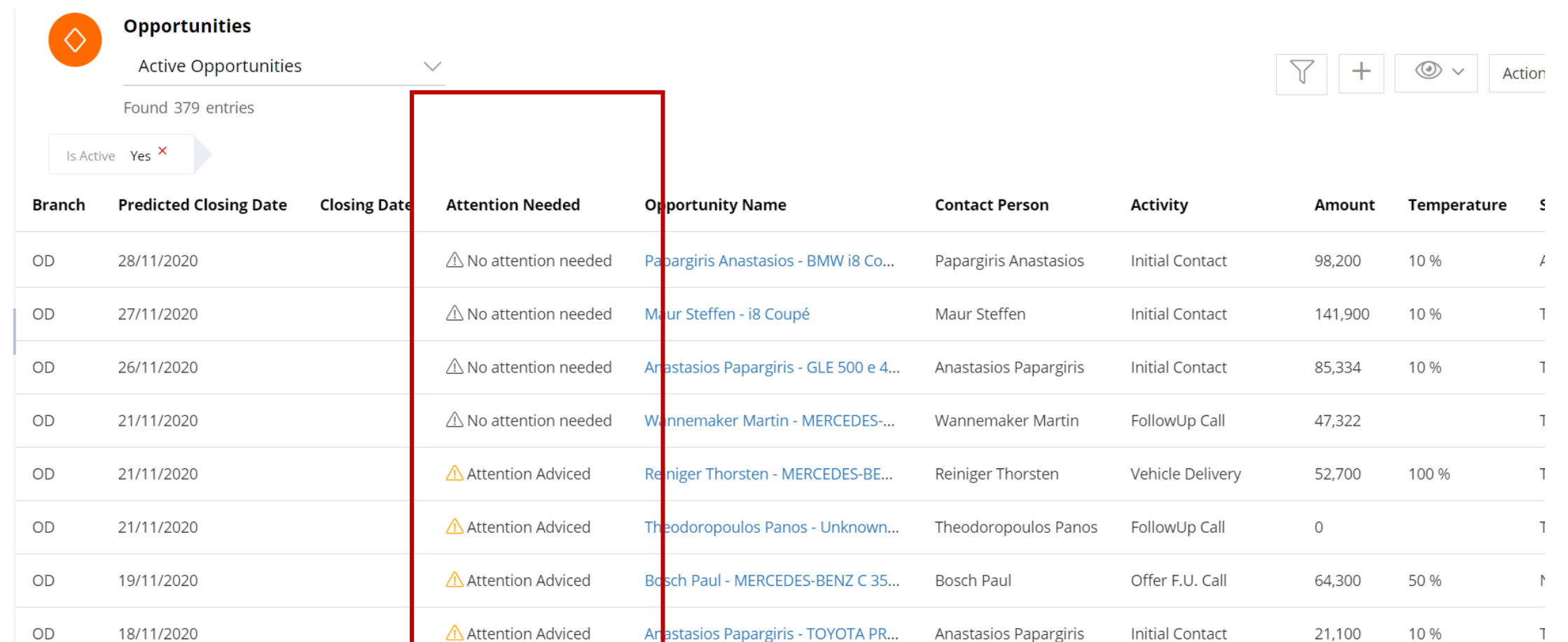
Activity	End Date-Time	Contact Name	Related Entity Name	Related Entity Type	Assigned User
Offer Follow Up Call	18/12/2020 21:04	Nikos Ioannou	Ioannou Nikos - MERCEDES-BENZ GLC 35...	Sales Lead	Nikos Ioannou
Offer Follow Up Call	18/12/2020 20:44	Ralf Neumann	Neumann Ralf - Tiguan 1.5 TSI 150PS ACT...	Sales Lead	Nikos Ioannou
Offer Follow Up Call	18/12/2020 20:24	Felix Becker	Becker Felix - GLC 350 E 4MATIC	Sales Lead	Nikos Ioannou
Delivery Follow Up call	18/12/2020 19:45	Thomas Huber	Huber Thomas - 116d (F40)	Sales Lead	Nikos Ioannou
Initial Contact	18/12/2020 19:15	Jürgen Maur	Maur Jürgen - GLC 350 e 4MATIC Coupe	Sales Lead	Nikos Ioannou
Showroom Visit	18/12/2020 18:45	Nikos Ioannou	Ioannou Nikos - GLC 350 e 4MATIC Coupe	Sales Lead	Nikos Ioannou
Execute Test Drive	18/12/2020 18:30	George Brouzas	Brouzas George - 116d (F40)	Sales Lead	Nikos Ioannou

Overdue Activities (Attention Indicators)

Features description

There is a new indicator in the opportunities, sales leads, and purchase leads that indicates whether the latest planned activity date is delayed compared to the current date more than the predefined number of days (1st and 2nd threshold).

When the 1st threshold is exceeded, then the lead is marked with yellow color and the attention needed becomes “Attention Advised”, while when exceeding the 2nd threshold it is marked with red color and the attention needed becomes “Attention Needed”.



The screenshot shows a table titled 'Opportunities' with a sub-header 'Active Opportunities'. It contains 8 rows of data. The 'Attention Needed' column is highlighted with a red box. The values in this column are: 'No attention needed' (4 rows), 'Attention Advised' (3 rows), and 'Attention Needed' (1 row).

Branch	Predicted Closing Date	Closing Date	Attention Needed	Opportunity Name	Contact Person	Activity	Amount	Temperature	Score
OD	28/11/2020		⚠ No attention needed	Papargiris Anastasios - BMW i8 Co...	Papargiris Anastasios	Initial Contact	98,200	10 %	1
OD	27/11/2020		⚠ No attention needed	Maur Steffen - i8 Coupé	Maur Steffen	Initial Contact	141,900	10 %	1
OD	26/11/2020		⚠ No attention needed	Anastasios Papargiris - GLE 500 e 4...	Anastasios Papargiris	Initial Contact	85,334	10 %	1
OD	21/11/2020		⚠ No attention needed	Wannemaker Martin - MERCEDES-...	Wannemaker Martin	FollowUp Call	47,322		1
OD	21/11/2020		⚠ Attention Advised	Reiniger Thorsten - MERCEDES-BE...	Reiniger Thorsten	Vehicle Delivery	52,700	100 %	1
OD	21/11/2020		⚠ Attention Advised	Theodoropoulos Panos - Unknown...	Theodoropoulos Panos	FollowUp Call	0		1
OD	19/11/2020		⚠ Attention Advised	Bosch Paul - MERCEDES-BENZ C 35...	Bosch Paul	Offer F.U. Call	64,300	50 %	1
OD	18/11/2020		⚠ Attention Advised	Anastasios Papargiris - TOYOTA PR...	Anastasios Papargiris	Initial Contact	21,100	10 %	1

Team Assignment

Team Assignment is a new feature that allows you to assign a Sales Lead or a Purchase Lead to a team instead of assigning it to a single employee. The created leads or opportunities are available to the members of the sales or purchase teams, who can select a specific lead or opportunity and assign it to themselves.

Create Lead

Email: svenjung@mailinator.com

Mobile Phone:

Business Partner: Jung Sven

Price: 54,513.70 €

Channel: Campaign

Source: Website

Branch: OD Benelux

Team: OD Benelux - Sales

Search

Apps

- Back
- Leads To Pickup
- Opportunities To Pickup
- Purchase Leads To Pickup

Leads To Pickup

Active Leads

Found entries

Creation Date	Attention Needed	Name	Bus. Partner	Contact Email	Family Name	Vehicle Title	Amount	Update Date	Stage	Activity	Contact Mobile	Contact Phone
---------------	------------------	------	--------------	---------------	-------------	---------------	--------	-------------	-------	----------	----------------	---------------

Assign to me

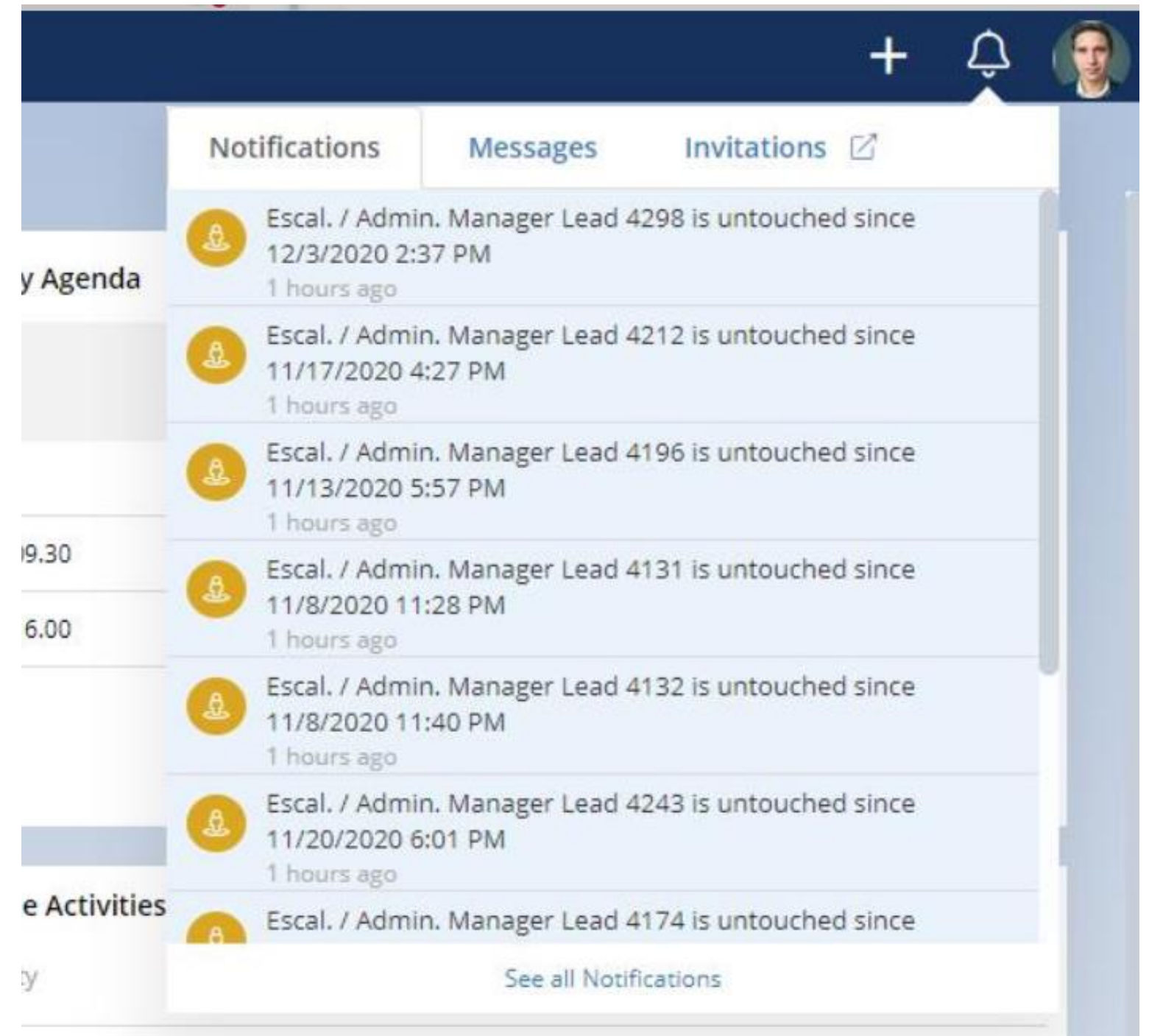
Escalation due to Overdue Unassigned Sales and Purchase Leads

Feature description

This is an important new feature that allows the escalation of unassigned sales and purchase leads based on predefined times. This feature creates notification emails and notification messages to the person that has been appointed to manage the escalated unassigned leads based on specific set-up.

Business Benefit

Helps the sales manager to identify delays in managing leads and to act accordingly.



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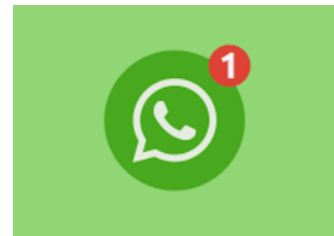
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Smart Notification Templates



E-mail

Either ad-hoc emails with optional attachments or notification emails



WhatsApp

Ad-hoc messaging including attachments (optionally)



SMS

Messaging via Campaign Management

Description

All notifications were previously hardcoded. With the new product feature Smart Notification Templates, gives the opportunity to a consultant to design layouts for e-mails (master template and various content according to the use).

In the same way the WhatsApp and the SMS texts can be also designed by a consultant.

Master Template - Edit

Benefit

It is an important feature that expedites the process of creating notifications without any technical background or dependency on software development team.

Smart Document Templates

Description

This feature gives the opportunity to the solution consultant to design and to create templates to be used as Printed Documents by using simply the Microsoft Word RTF functionality and save the file with the rtf type.

As soon as the printed document is created as an rtf, then it can be uploaded to OneDealer Notification Server with an identification of its use. For example: GDPR Digital Form, or Vehicle Printout, etc...

Benefit

It is an important feature that expedites the process of creating printed documents without any technical background or dependency on software development team.



CUSTOMER INFORMATION AND DECLARATION FOR THE PROCESSING OF PERSONAL DATA

I hereby acknowledge and accept that OneDealer International GmbH, in accordance with the new General Data Protection Regulation (EU 2016/679), will collect and process personal data (indicative: vehicle chassis number, vehicle history, and vehicle diagnostic data, name, address, VAT number, contact details, etc.), which I have provided in the context of concluding either a car sale contract or after sales service. The purpose of such processing is the fulfillment of legal obligations (such as the provision of factory warranty, repair campaigns, safety recalls, roadside assistance, tax, customs or other legal obligations), which is made on the basis of the fulfillment of the fulfillment of legal obligations of your company as a Controller and your consent is not the legal basis of the processing.

For detailed information on how you use your personal data and your rights as a data subject, see <https://www.onedealer.com/en/onedealer-terms-privacy-policy-en/>

In addition, your personal data may be used for the following purposes: (please fill in x in the boxes below where you consent)

<input checked="" type="checkbox"/>	Agree	market and customer satisfaction surveys *
<input checked="" type="checkbox"/>	Disagree	
<input checked="" type="checkbox"/>	Agree	promotion of products and services *
<input checked="" type="checkbox"/>	Disagree	
<input checked="" type="checkbox"/>	Agree	profiling for customized services and products *
<input checked="" type="checkbox"/>	Disagree	

I prefer the communication to be done:

By Phone Via SMS Via Email By Mail

The above communication license with you is granted to OneDealer International GmbH. Your data will be retained for as long as is required to accomplish the above purposes (provided you have not subsequently withdrawn your consent) and generally for as long as is permitted or required by law and at least as long as the factory warranty.

Recall

You can revoke your consent at any time without charge by sending the relevant declaration to OneDealer International GmbH or by e-mail. (Note: revoking the consent may prevent you from using or receiving some of our services such as technical updates for your car).

First Name:
Last Name:
Address: (if you choose communication by mail)
Email: (if you choose communication via email)
Mobile Phone: (if you choose communication via sms or by phone)
Phone: (if you choose communication by phone)

GDPR Printed Form Upload in GDRP Customer Preferences

Feature description

The user has the possibility to select an available OD Template that can be filled-out with the customer information, can be printed, signed, scanned and uploaded.

The template can be also signed digitally.

Business Benefit

Helps with the productivity since the template is easy to search and to find.



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<input checked="" type="checkbox"/>	Disagree	

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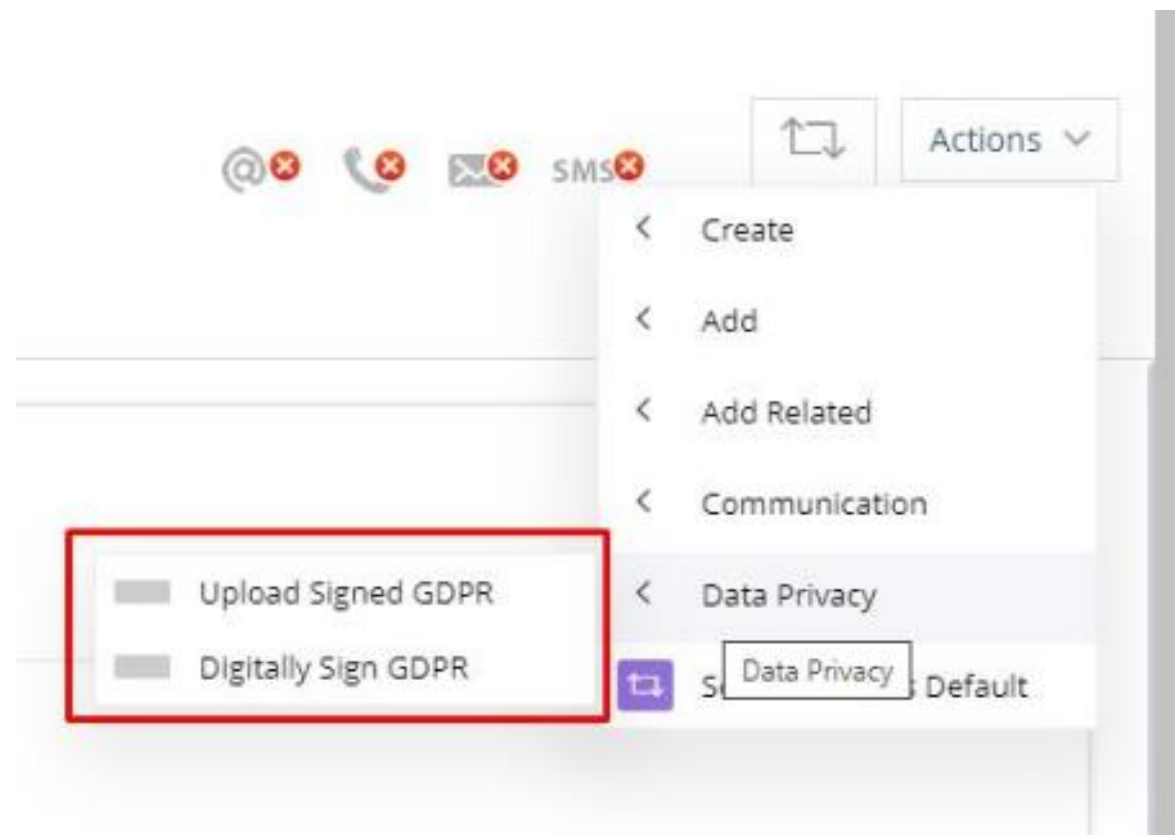
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....and more

- ✓ Manage Sales Process via Workflow
- ✓ Smart Templates for notifications and documents
- ✓ Office 365 Outlook OneDealer Add-In
- ✓ Customizable work-place (dashboards per role)
- ✓ Market Place Integration (TwoS)

Transact with minimum TCO

Cloud Services

- ✓ Office 365
- ✓ Mobile Device Management
- ✓ SAP Cloud
- ✓ Amazon Cloud
- ✓ Azure

SAP Backbone Platform

OneDealer Backbone

- ✓ SAP HANA
- ✓ SAP Business Objects

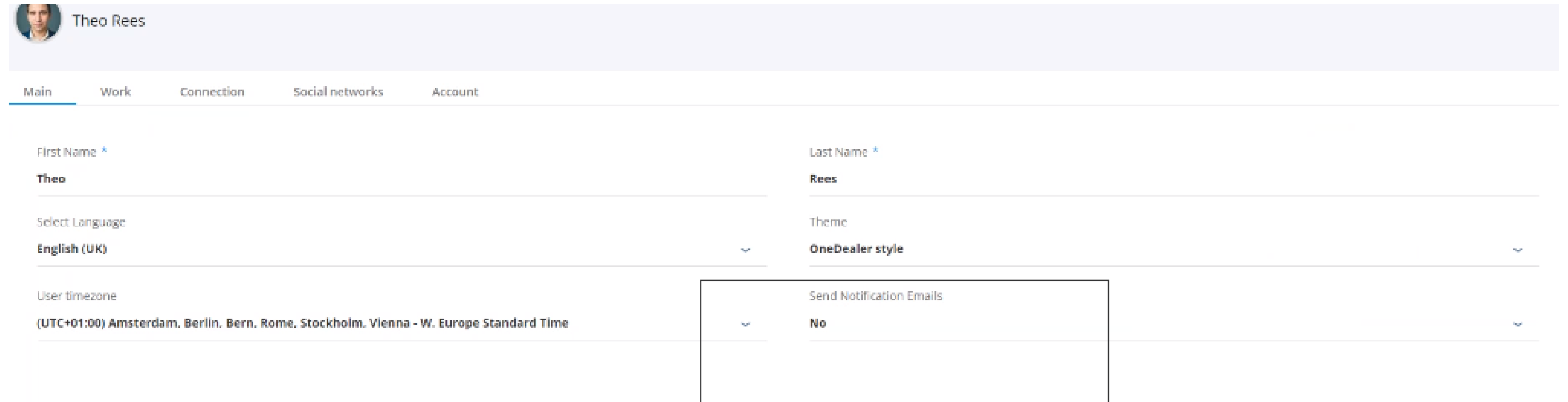
Integration Layer

- ✓ Configurable end-points
- ✓ Interfaces with OEM backbone systems
- ✓ Interface with ERP systems
- ✓ Interface with Dealer Management Systems
- ✓ Interface with 3rd Party systems

Big Data & Analytics

- ✓ Reporting and Management Support System
- ✓ Predictions
- One Dealer Analytics**
- Social Analytics**
- ✓ Social KPIs

Send Notification Email to Team members



Theo Rees

Main Work Connection Social networks Account

First Name *	Last Name *
Theo	Rees
Select Language	Theme
English (UK)	OneDealer style
User timezone	Send Notification Emails
(UTC+01:00) Amsterdam, Berlin, Bern, Rome, Stockholm, Vienna - W. Europe Standard Time	No

Feature Description

When the Send Notification Email indicator is activated, then the user receives an email additionally to the notification for every activity linked to notifications

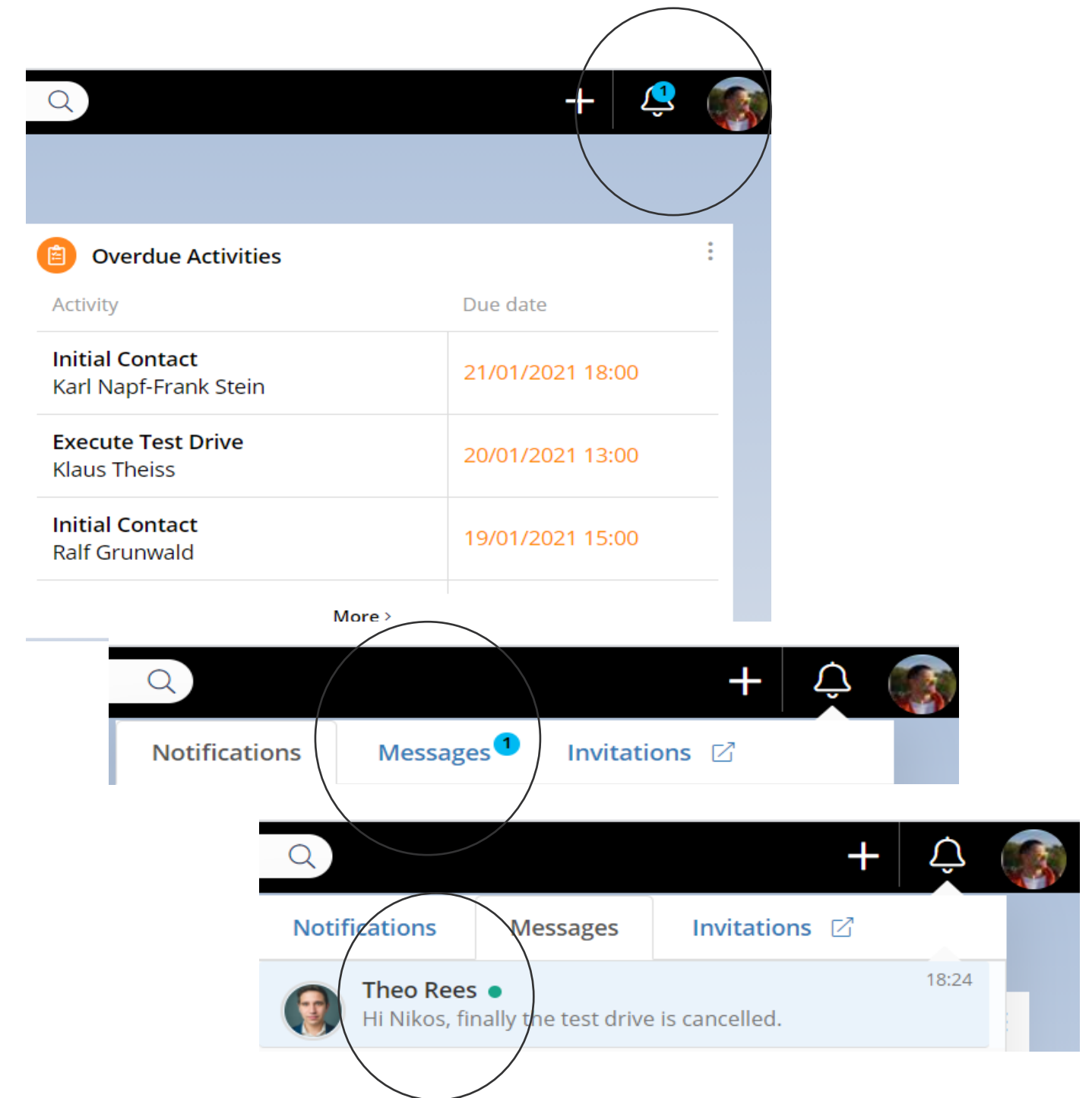
Message function - show new received message via bell

Feature description

When a message arrives, it is counted in the number displayed on the bell icon, and it is counted in the number displayed in the tab Messages

Business benefit

The employee is notified for all arriving messages as it is notified for all Notifications and Invitations.



Call-Back Request

Description

The call-back request is a new feature introduced that provides the opportunity to create call back requests and assign them to a specific employee in the dealership.

In the business scenario introduced in our standard product, the call center agent can create and assign a call back request to a sales person after talking on the phone with a prospect customer. The feature can be expected to after sales operations as well.

The request is creating an activity for the assigned salesperson and a notification message is also generated.

All call back requests are included in the Agenda of the assignee, as well as in the overdue activities of the assignee and the team.

Callback Request

Notifications Messages 1 Invitations

Dorothy Glendron A callback request was created for Business Partner: Reidl Oli And Contact Person: Reidl Oli 0 minutes ago

Callback Details

Contact Person * Reidl Oli

Call Date * 25-01-2021 10:00

Employee * Ioannou Nikos

Notes

Please call Mr Reidl. He is very much interested in our new VOLVO Models, he has some questions and he wants to fix an appointment.

Cancel Save

My Agenda

25 Monday January 2021

Time	Event
10.00-10.30	Callback Request - Reidl Oli

More >

Benefit

Important features that gives the opportunity to assign directly call back requests to sales advisors and thus increase the probability of creating new leads

Notes available when displaying activity details

Feature description

Notes of Activities are now displayed in the activities list as well as in the pop-up window with the details of each activity.

The screenshot displays the OneDealer interface. On the left, a 'Callback Request' pop-up window is open, showing details for a call on 25-01-2021 at 10:00. The contact person is Reidl Oli, and the employee is Ioannou Nikos. The status is 'Closed' with a 'No' toggle. The notes section contains the text: 'Please call Mr Reidl. He is very much interested in our new VOLVO Models, he has some questions and he wants to fix an appointment.'

On the right, the 'Activities' list shows a timeline of events:

- 25/01/2021 10:00**: Callback Request. Note: 'Please call Mr Reidl. He is very much interested in our new VOLVO Models, he has some questions and he wants to fix an appointment.'
- 22/01/2021 10:40**: Used Car Evaluation
- 22/01/2021 09:00**: Offer F.U. Call
- 22/01/2021 10:30**: Purchase Visit. Note: 'The customer is interested to sell his car in 3 months and he is asking for a price'

A call icon in the activities list is linked to the 'Purchase Visit' activity note.

Form personalization

The screenshot displays the 'Form Personalization' interface. At the top, it says 'Select which fields you want to be displayed and drag & drop them for ordering'. Below this, there are several sections:

- General data:** A list of fields with checkboxes and control buttons. The 'Name' field is highlighted with a red box and an arrow pointing to an 'Edit Visibility' label. The 'Name' field has a checked checkbox, an 'Order' dropdown with up and down arrows, and a 'Validation Settings' gear icon. Other fields include 'Business Partner Type', 'Mobile Phone', and 'Telephone 1', each with their own 'Order' and 'Validation Settings' controls.
- Validation Settings dialog:** A smaller window is open, showing 'Validation Settings' for a field. It includes a 'Required' checkbox, an 'Expression' field with a dropdown menu (showing options like 'Only Digits ^[0-9]+\$'), and 'Mask' and 'Max Length' input fields. Buttons for 'Cancel' and 'Save as default' are at the bottom.
- Main Form Personalization dialog:** A larger window is open, showing the 'Form Personalization' title and the same list of fields. The 'Model as a comment' field is selected. It has a checked checkbox, an 'Order' dropdown, and a 'Validation Settings' gear icon. Below the field list, there are 'Cancel', 'Save as default', and 'Save' buttons.

Feature description

Each form can be personalised by the user by selecting the available fields that are relevant to the specific form. An additional validation has been added to secure that the mandatory fields cannot be excluded from the form. Also, the user can define which fields are required in a form.

The validation can be extended by defining the validation settings (Expression, Mask, and Max Length).

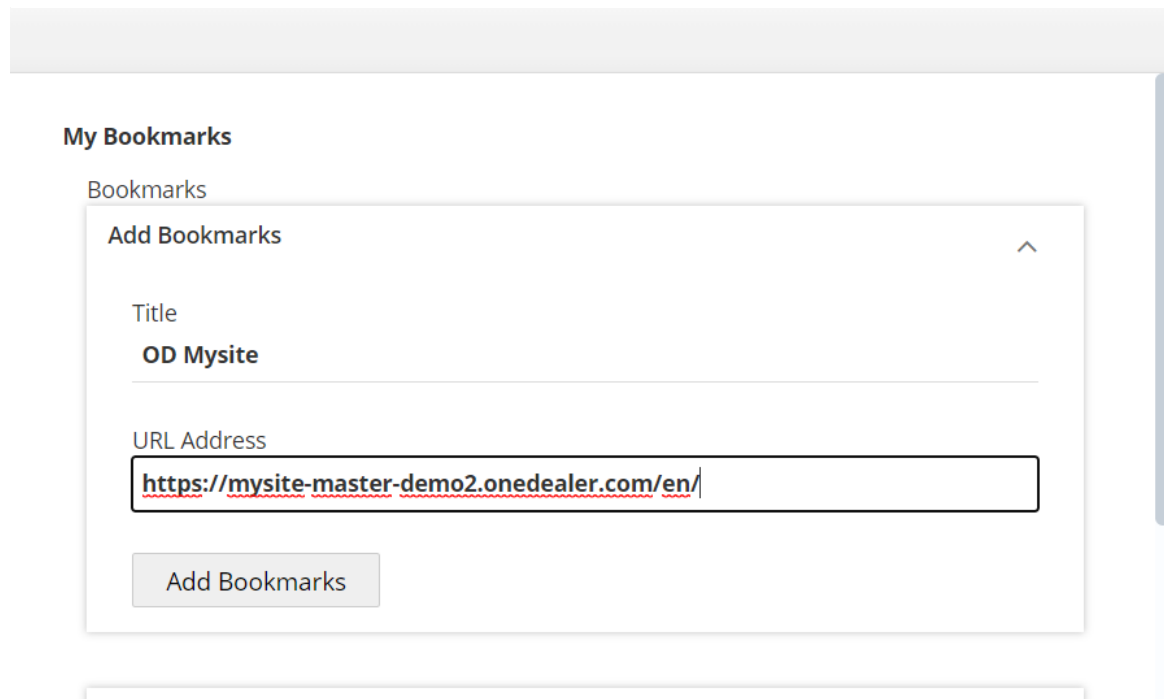
The role Admin is necessary so the user can do the above modifications.

Business benefit

Increased flexibility in customization and personalization of user forms.

My Bookmarks widget improvement

Add Bookmarks in the widget



The screenshot shows a 'My Bookmarks' widget with a sub-section titled 'Add Bookmarks'. It contains a form with the following fields:

- Title:** OD Mysite
- URL Address:** <https://mysite-master-demo2.onedealet.com/en/>

Below the form is an 'Add Bookmarks' button.

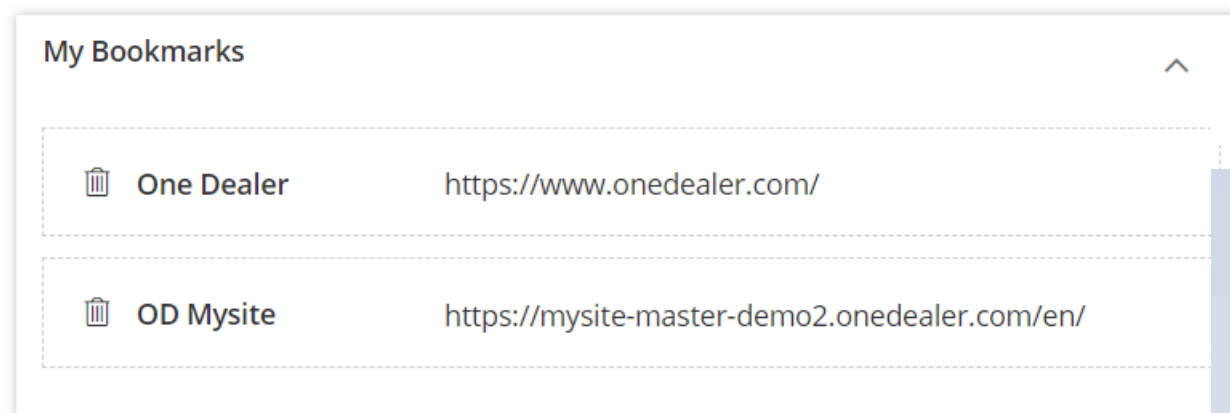
Feature description

The user has the possibility to set-up his/her own bookmarks widget by adding the pages very often used in the daily work.

Business Benefit

Helps with the productivity while using the system, since the user has a quick access to all pages he needs to do his work.

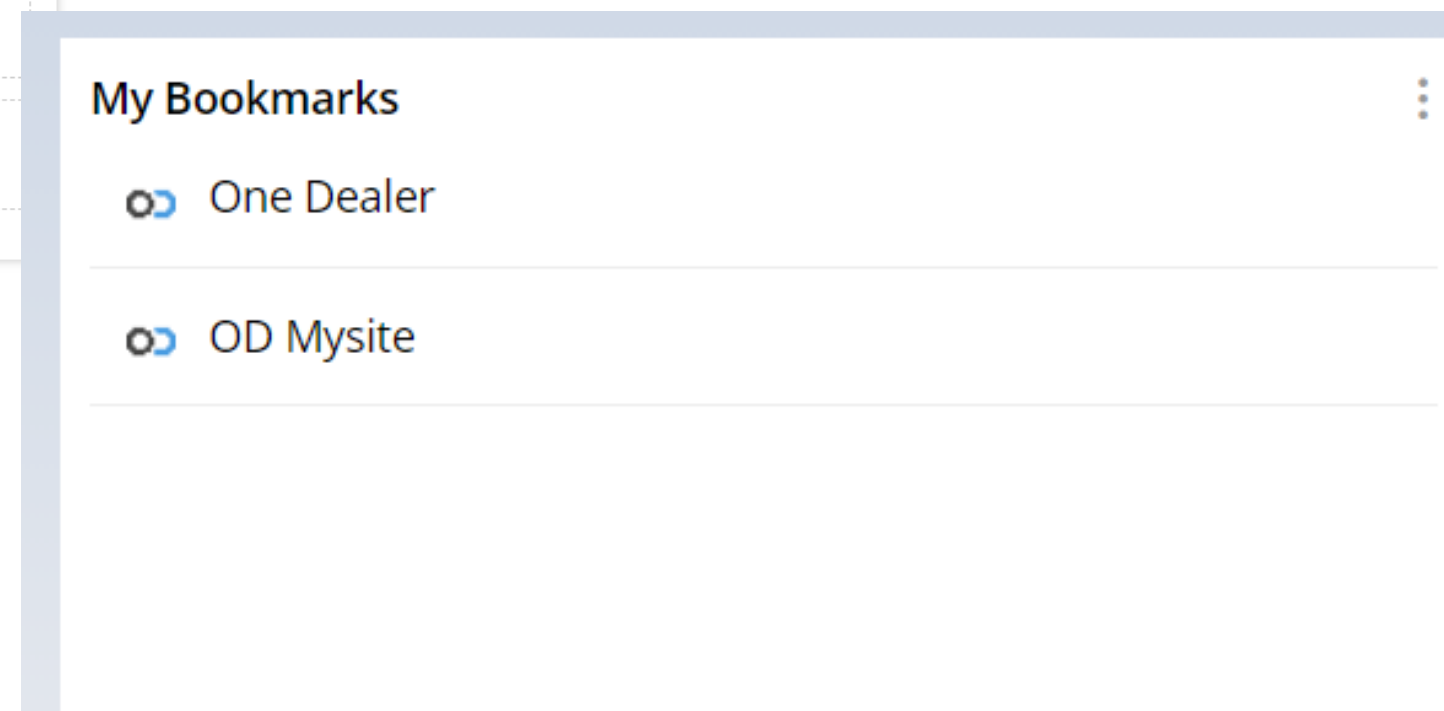
My Bookmarks



The screenshot shows a 'My Bookmarks' widget with a list of two saved bookmarks:

Bookmark Name	URL
One Dealer	https://www.onedealet.com/
OD Mysite	https://mysite-master-demo2.onedealet.com/en/

Bookmarks Widget in personalised Dashboard



The screenshot shows the 'My Bookmarks' widget in a personalised dashboard. It displays a list of two bookmarks:

- One Dealer
- OD Mysite



Thank you!

Contact Us

info@oneddealer.com

partnering@oneddealer.com

Discover More



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