

October 2024

OpenFlex

Updates 1.77

Opportunities

1. Optimising the back button from the "Opportunities" and the "Vehicles" module:
2. Stock auctions, creation of mailing list(s):

Customers

1. Automatic assignment of the "Followed by" when creating an offer:

Management

1. Adding new filters in the monitoring activity:

Settings

1. New: duplication of adjustments impacting market value.
2. New setting to define the recipients of quotation requests:

Opportunities



















1

Optimising the back button from the "Opportunities" and the "Vehicles" module:

In the past, when a sales representative consulted the list of the vehicles in stock during an offer, the path of the opportunity went lost when the user viewed one of the vehicles' files. Only the elements from the "Vehicles" module were displayed.

The screenshot shows a web interface for a vehicle listing. At the top, a breadcrumb trail reads "VEHICLES > RENAULT AUSTRAL". The main heading is "RENAULT AUSTRAL" with a status "Physical entry - Sale allowed" and a "Manage status" link. Below the heading are four action buttons: "Make offer with this vehicle" (blue), "Schedule a trial appointment" (yellow), "Modify" (yellow), and "Reserve the vehicle" (yellow), followed by a three-dot menu. A navigation bar contains "SYNTHESIS" (active), "EQUIPMENT AND OPTIONS*", "ADDITIONAL PRODUCTS", and "OTHERS v". The main content area is split into two columns. The left column displays the vehicle name "RENAULT AUSTRAL" and model "MILD HYBRID 160 AUTO GSR2 EVOLUTION". The price is listed as "£36,000.00 Incl. VAT" with an edit icon. Below this, it shows "Adjusted market value: £28,700.00 Incl. VAT" and "Powered by Autovista France" with a "See the details" link. The right column features a large image of a red Renault Austral SUV with navigation arrows and a gallery indicator. Below the image are links for "Add media (0 pictures, 0 videos)" and "Technical characteristics". At the bottom of the page, a green box indicates "3 days in stock".

From now on, a salesperson will find the browsing elements which describe their path in the "**Opportunities**" module on the vehicle sheet that they wish to link to an offer.

	<p>SKODA SCALA 1.0 TSI Evo 110 ch BVM6 Ambition</p> <p>Additional information</p>	<ul style="list-style-type: none">  Essence  6 CV / 110 ch  5 D  108 (g/km)  Bleu 	<p>Used - Individual FG256ML</p> <table border="1"> <thead> <tr> <th>PIS</th> <th>Mileage</th> </tr> </thead> <tbody> <tr> <td>9/14/2023</td> <td>4,563 km</td> </tr> <tr> <th>Status</th> <th>Point of sale</th> </tr> <tr> <td>Stock de vente</td> <td>Point de vente 1 (...)</td> </tr> <tr> <th>Physical presence site</th> <th>Stock</th> </tr> <tr> <td>Point de vente 1 (Vin...</td> <td>16 days</td> </tr> </tbody> </table>	PIS	Mileage	9/14/2023	4,563 km	Status	Point of sale	Stock de vente	Point de vente 1 (...)	Physical presence site	Stock	Point de vente 1 (Vin...	16 days	<p>20 370,35 € Incl. VAT 347,78 € / month</p> <p>View the vehicle</p> <p>ID : 499</p>
PIS	Mileage															
9/14/2023	4,563 km															
Status	Point of sale															
Stock de vente	Point de vente 1 (...)															
Physical presence site	Stock															
Point de vente 1 (Vin...	16 days															
	<p>MAZDA CX-5 2.0L Skyactiv-G 165 ch 4x2 BVA6 Dynamique</p> <p>SHO 2</p> <p>Additional information</p>	<ul style="list-style-type: none">  Essence  9 CV / 165 ch  5 D  150 (g/km)  Noir 	<p>Used - Individual AV484AV</p> <table border="1"> <thead> <tr> <th>PIS</th> <th>Mileage</th> </tr> </thead> <tbody> <tr> <td>8/18/2019</td> <td>14,850 km</td> </tr> <tr> <th>Status</th> <th>Point of sale</th> </tr> <tr> <td>Stock de vente</td> <td>Point de vente 2 (...)</td> </tr> <tr> <th>Physical presence site</th> <th>Stock</th> </tr> <tr> <td>Point de vente 2 (Au...</td> <td>27 days</td> </tr> </tbody> </table>	PIS	Mileage	8/18/2019	14,850 km	Status	Point of sale	Stock de vente	Point de vente 2 (...)	Physical presence site	Stock	Point de vente 2 (Au...	27 days	<p>21 281,80 € Incl. VAT 366,17 € / month</p> <p>View the vehicle</p> <p>ID : AV99999</p>
PIS	Mileage															
8/18/2019	14,850 km															
Status	Point of sale															
Stock de vente	Point de vente 2 (...)															
Physical presence site	Stock															
Point de vente 2 (Au...	27 days															
	<p>SKODA KAROQ 1.0 TSI 116 ch DSG7 Ambition</p> <p>Additional information</p>	<ul style="list-style-type: none">  Essence  6 CV / 116 ch  5 D  118 (g/km)  Noir 	<p>Demonstration AV158AV</p> <table border="1"> <thead> <tr> <th>PIS</th> <th>Mileage</th> </tr> </thead> <tbody> <tr> <td>5/12/2018</td> <td>45,000 km</td> </tr> <tr> <th>Status</th> <th>Point of sale</th> </tr> <tr> <td>Stock de vente</td> <td>Point de vente 1 (...)</td> </tr> <tr> <th>Physical presence site</th> <th>Stock</th> </tr> <tr> <td>Point de vente 1 (Au...</td> <td>29 days</td> </tr> </tbody> </table>	PIS	Mileage	5/12/2018	45,000 km	Status	Point of sale	Stock de vente	Point de vente 1 (...)	Physical presence site	Stock	Point de vente 1 (Au...	29 days	<p>27 390,00 € Incl. VAT 457,23 € / month</p> <p>Current offer</p> <p>View the vehicle</p> <p>ID : AV999</p>
PIS	Mileage															
5/12/2018	45,000 km															
Status	Point of sale															
Stock de vente	Point de vente 1 (...)															
Physical presence site	Stock															
Point de vente 1 (Au...	29 days															

Each step of the opportunity will be visible at the top of the page.

As a complement, a new feature was integrated to make the search of the vehicles in stock more fluid when an user will go back to the vehicle selection tab from an opportunity.

The screenshot shows a web application interface for a vehicle listing. At the top, there is a navigation bar with links for Home, Vehicles, Opportunities, Customers, and Management. The user is logged in as 'bee2link PP Vincent S.' with a profile icon. Below the navigation bar, a breadcrumb trail reads: OPPORTUNITIES > OPPORTUNITY OF MR JEAN BOULOT > NEW OFFER > STOCK > MAZDA CX-5. The main content area is titled 'MAZDA CX-5' and includes a 'Stock de vente' button. Two action buttons are present: 'Make offer with this vehicle' (blue) and 'Make a transfer request' (yellow). Below these are tabs for 'SYNTHESIS', 'EQUIPMENT AND OPTIONS', 'FINANCING', and 'OTHERS'. The 'SYNTHESIS' tab is active, displaying the following information: MAZDA CX-5, 2.0L SKYACTIV-G 165 CH 4X2 BVA6 DYNAMIQUE, 21 281,80 € Incl. VAT, 366,17 € / month, Adjusted market value 25 030,00 € incl. VAT, and a 'See the details' link. The fuel type is 'ESSENCE' and the vehicle is 'Used - Individual' with ID AV484AV. A 3D rendering of the Mazda CX-5 is shown on the right side of the page.

The page which shows all the stock available will load automatically on the level of the previously selected vehicle by the user to avoid the need to scroll through all the stock again.

The "**Vehicles**" module also benefits from this new feature. If a user views a vehicle file in stock, OpenFlex will take into account the position of this vehicle in the stock tab when a user presses the back button.

Vehicle	Fuel Type	Price	Category
MAZDA CX-5 2.0L Skyactiv-G 165 ch 4x2 BVA6 Dynamique	Essence	21 281,80 €	Used - Individual
SKODA KAROQ 1.0 TSI 116 ch DSG7 Ambition	Essence	27 390,00 €	Demonstration
SEAT ATECA 1.6 TDI 115 ch Start/Stop Ecomotive Reference	Diesel	21 412,00 €	Used - Individual

2 Stock auctions, creation of mailing list(s):

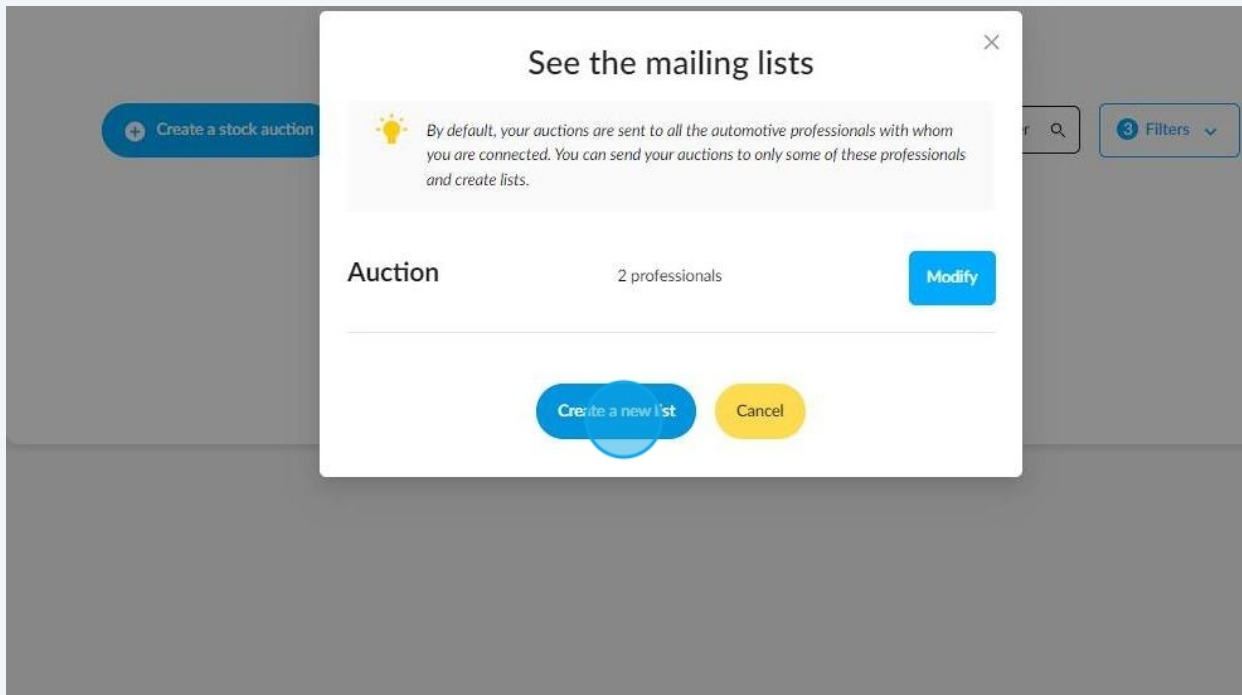
Following the feedback of our clients, we have added the possibility to create mailing lists to enable dealers to invite the automotive professionals of their choice to participate to the stock auctions.

The screenshot shows the 'Stock auctions' page with the following elements:

- Navigation bar: Home, Vehicles, Opportunities, Customers, Management, GC, bee2link Vincent S. Point de vente 1 (Vincent S.)
- Section Header: Stock auctions
- Buttons: Create a stock auction, Mailing lists
- Search Bar: Vehicle, registration number, internal number, chassis or customer number
- Filters: 3 Filters
- Status: No Data

This way, the dealer will be able to establish customised mailing lists which will allow them to target the suitable automotive professionals during the stock auctions preparation.

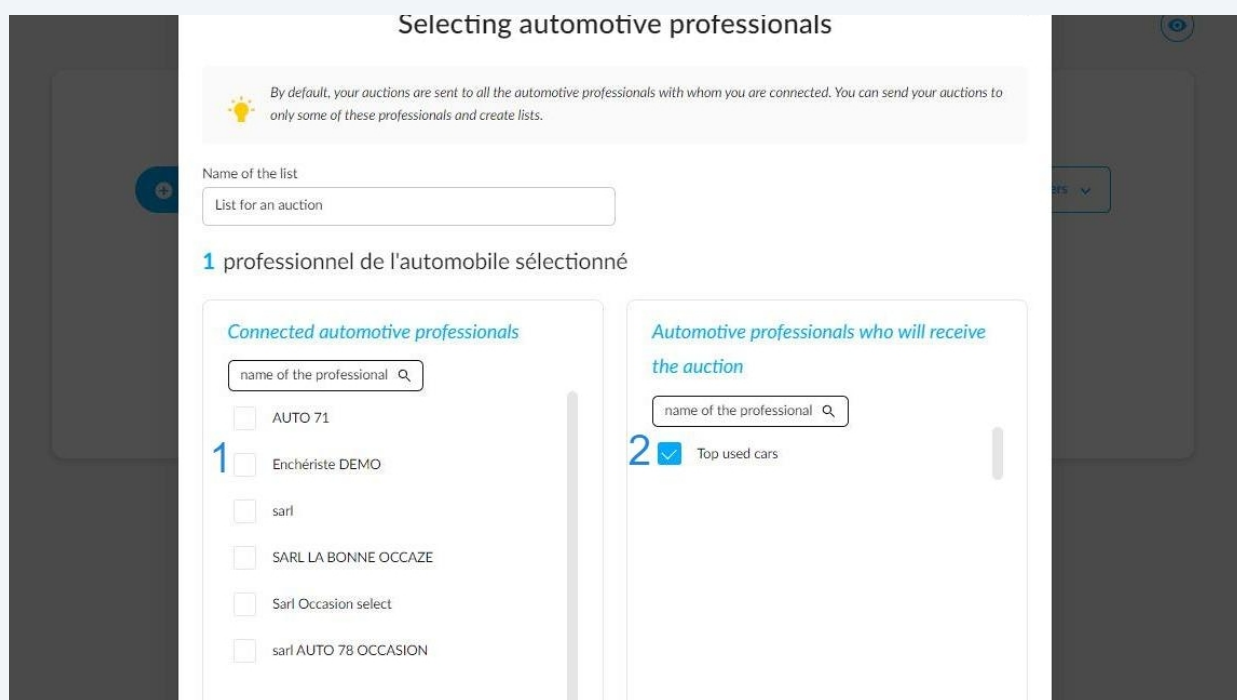
Reminder: if no mailing list has been drawn up or selected at the stage of the creation of an auction, all automotive professionals that are connected with the dealer will receive the invitation without exception.



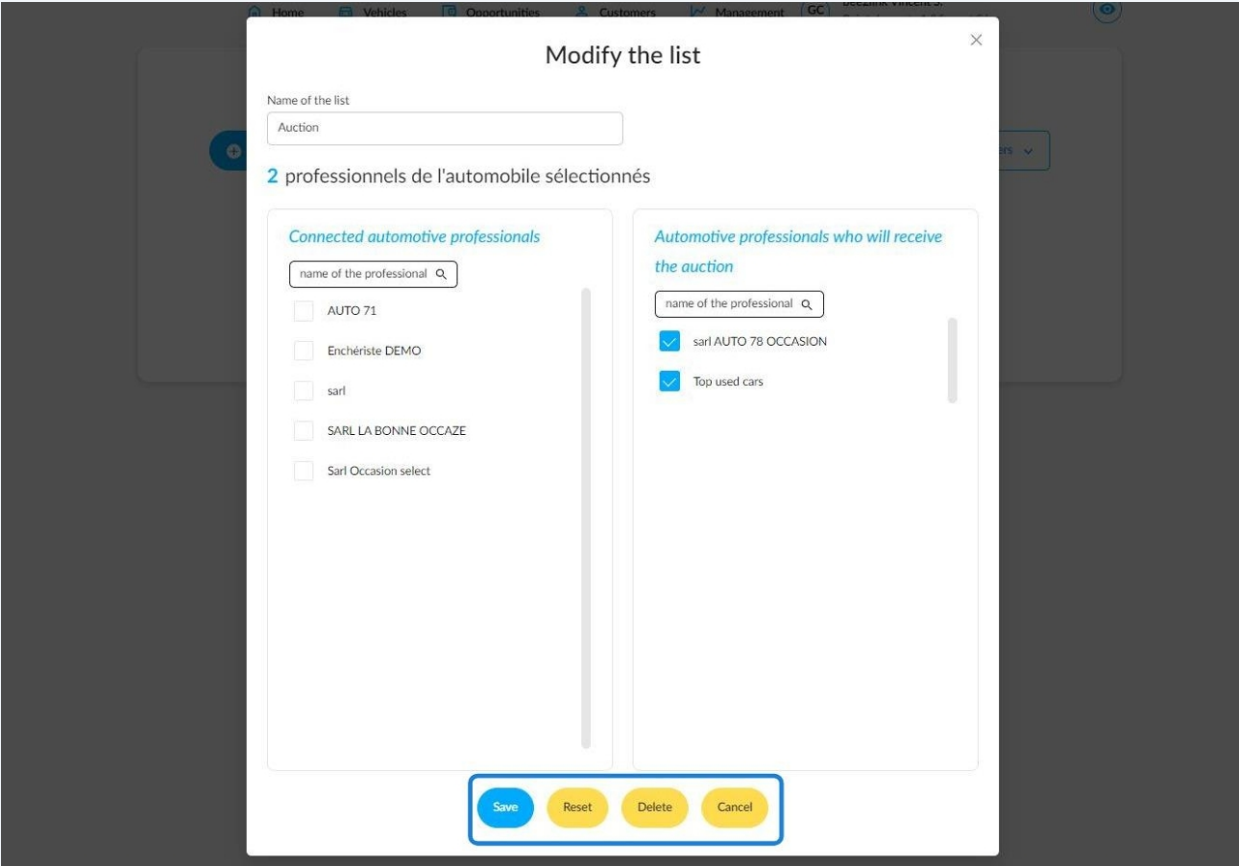
When creating a list, add a title and then select in the left column **(1)** the professionals to whom you wish to send the invitations to participate to the stock auctions.

The professionals chosen by the distributor will be listed in the right column **(2)**. By unticking the box next to a professional's name, the dealer will remove him from the recipients list.

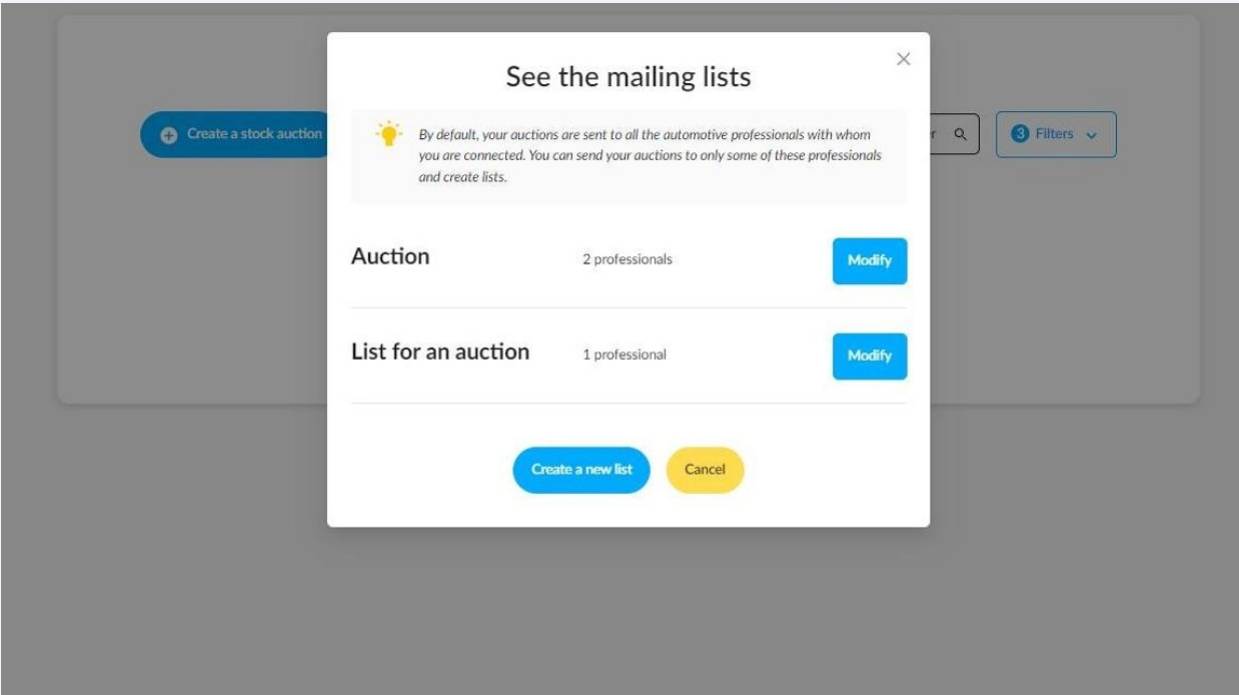
Once the list is set, the dealer will have to **save** it by using the button designed for this purpose at the bottom of the window.




He will also get the possibility to cancel the changes by clicking on the "Reset" button or decide to "Cancel" this list if they need to.



It will be possible to create as many mailing lists as you wish.



When you will create an auction, open the drop-down menu to select the appropriate list.

 Creating an auction sale allows you to select one or multiple vehicles for automotive professionals who are connected to you. This will generate an auction within the PriceBack application where they can then bid on this lot. You will then be able to follow this auction via the "Auctions in progress" tile on the homepage.



Auction broadcast at **All professionals** (7 professionnels) [Selecting professionals](#)

I want to plan the start of the auction sale

The duration of the auction sale is minute(s)

Minimum overbid amount € Incl. VAT


Vehicles in the auction sale

	Market value incl. VAT	Selling price Incl. VAT	Actual C. margin excl.	Pricing Incl. VAT	Final actual C. margin excl.	Reserve price incl. VAT
CITROEN C2 VTR 1.4i	4 170,00 €	3 440,25 €	662,47 €	3 440,25 €	662,47 €	
MITSUBISHI SPACE STAR MY21 Red Line Edition 1.2 MIVEC 71 CVT AS&G	- €	7 000,00 €	5 658,33 €	7 000,00 €	5 658,33 €	
Total	4 170,00 €	10 440,25 €	6 320,80 €	<input type="text" value="10440.25"/> €	6 320,80 €	<input type="text" value="10440.25"/> €

[Create the auction sale](#) [Cancel](#)

Once you will have selected a list among those available, the number of contacted professionals will be specified. This list can still be rectified at this stage.

Create an auction on a lot ✕

 Creating an auction sale allows you to select one or multiple vehicles for automotive professionals who are connected to you. This will generate an auction within the PriceBack application where they can then bid on this lot. You will then be able to follow this auction via the "Auctions in progress" tile on the homepage.



Auction broadcast at **List for an auction** (1 professionnel) [Modify the list](#)

I want to plan the start of the auction sale

The duration of the auction sale is minute(s)

Minimum overbid amount € Incl. VAT


Vehicles in the auction sale

	Market value incl. VAT	Selling price Incl. VAT	Actual C. margin excl.	Pricing Incl. VAT	Final actual C. margin excl.	Reserve price incl. VAT
CITROEN C2 VTR 1.4i	4 170,00 €	3 440,25 €	662,47 €	3 440,25 €	662,47 €	
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Total	4 170,00 €	10 440,25 €	6 320,80 €	<input type="text" value="10440.25"/> €	6 320,80 €	<input type="text" value="10440.25"/> €

[Create the auction sale](#) [Cancel](#)

If none of the mailing lists configured in advance is suitable, you still have the option to create a new one by clicking on the **"Selecting professionals"** button.

Create an auction on a lot


 Creating an auction sale allows you to select one or multiple vehicles for automotive professionals who are connected to you. This will generate an auction within the PriceBack application where they can then bid on this lot. You will then be able to follow this auction via the "Auctions in progress" tile on the homepage.



Auction broadcast at: All professionals (7 professionnels) **Selecting professionals**

I want to plan the start of the auction sale

The duration of the auction sale is: minute(s)


Minimum overbid amount: € Incl. VAT

Vehicles in the auction sale

	Market value incl. VAT	Selling price incl. VAT	Actual C. margin excl.	Pricing incl. VAT	Final actual C. margin excl.	Reserve price incl. VAT
CITROEN C2 VTR 1.4i	4 170,00 €	3 440,25 €	662,47 €	3 440,25 €	662,47 €	
MITSUBISHI SPACE STAR MY21 Red Line Edition 1.2 MIVEC 71 CVT AS&G	- €	7 000,00 €	5 658,33 €	7 000,00 €	5 658,33 €	
Total	4 170,00 €	10 440,25 €	6 320,80 €	<input type="text" value="10440,25"/> €	6 320,80 €	<input type="text" value="10440,25"/> €

Then you will be able to create a new list.

Selecting automotive professionals


 By default, your auctions are sent to all the automotive professionals with whom you are connected. You can send your auctions to only some of these professionals and create lists.


Name of the list:

0 professionnels de l'automobile sélectionnés

Connected automotive professionals

- AUTO 71
- Enchériste DEMO
- sarl
- sarl AUTO 78 OCCASION
- SARL LA BONNE OCCAZE
- Sarl Occasion select
- Top used cars

Automotive professionals who will receive the auction


 No Data

Customers

1 Automatic assignment of the "Followed by" when creating an offer:

Until now, the assignment of the **"Followed by"** to the sales team members depended on a right that the sellers had rarely. Managers had to assign it manually.

The screenshot displays a CRM interface for a customer named Jean TAISTE. At the top, there is a navigation bar with icons for Home, Vehicles, Opportunities, Customers, and Management, along with a user profile for Bee2link Vincent Anglais. Below the navigation bar, the breadcrumb path reads 'CUSTOMERS > JEAN TAISTE'. The main content area features the customer's name 'Jean TAISTE' and a row of action buttons: 'New offer' (blue), 'Follow up with the customer' (yellow), 'Make an appointment' (yellow), 'Add a comment' (yellow), and a three-dot menu. Below the buttons are tabs for 'SYNTHESIS', 'VEHICLES', and 'HISTORY'. The 'Identity' section shows 'Mr Jean TAISTE' with a 'Prospect' tag and a creation date of 'Mar 21, 2024'. To the right, the 'Followed by' section indicates 'No follow-up by available' and shows a blue circular profile picture. Below this, it states 'Customer #1394, created on 03/21/2024 by Administrateur ADMINISTRATEUR' and includes a link for 'Information on customer consent'.

From now on, the creation of an offer from:

- a vehicle sheet,
- an opportunity
- or a customer sheet will imply the customer follow-up to be assigned to the user who made it.

Bis TRIS

[New offer](#) [Follow up with the customer](#) [Make an appointment](#) [Add a comment](#) [...](#)

SYNTHESIS VEHICLES HISTORY

Identity

Mr Bis TRIS
nomail@gmail.com

15 Chemin du Bosquet, Saint-Didier-au-Mont-d'Or, France, 69370 Saint-Didier-au-Mont-d'Or, Auvergne-Rhône-Alpes, France

Suspect 🕒 25 sept. 2024

Followed by
Administrateur ADMINISTRATEUR

[See all follow-ups by](#)

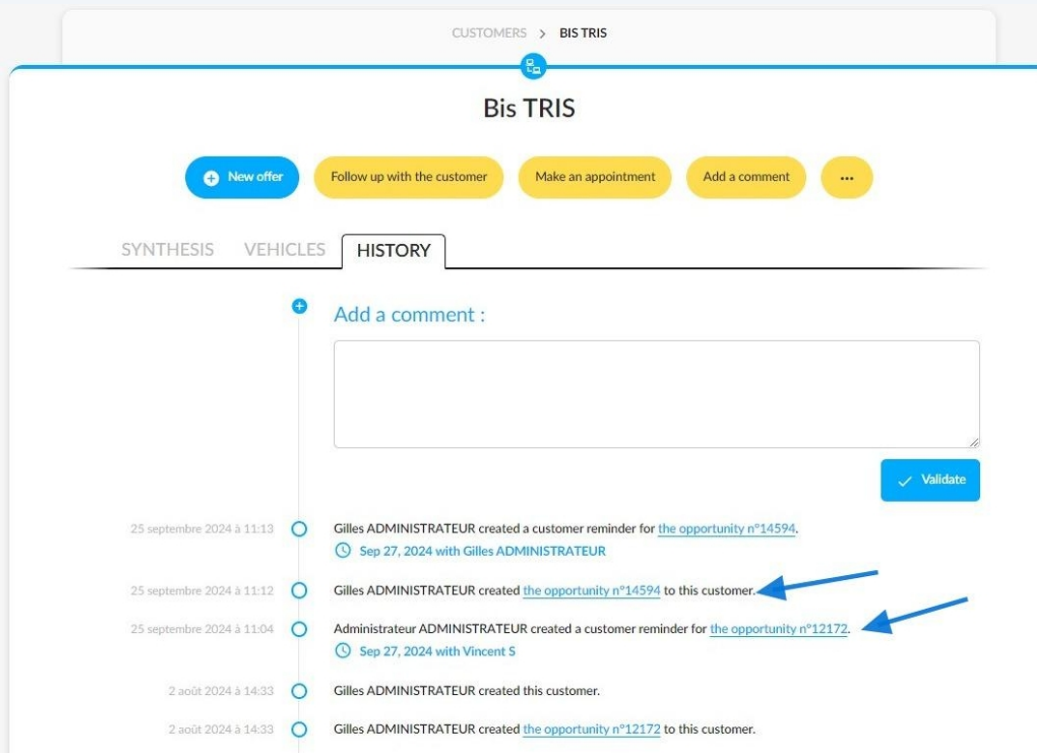
Customer #3386, created on 02/08/2024 by Gilles ADMINISTRATEUR

[Information on customer consent](#)

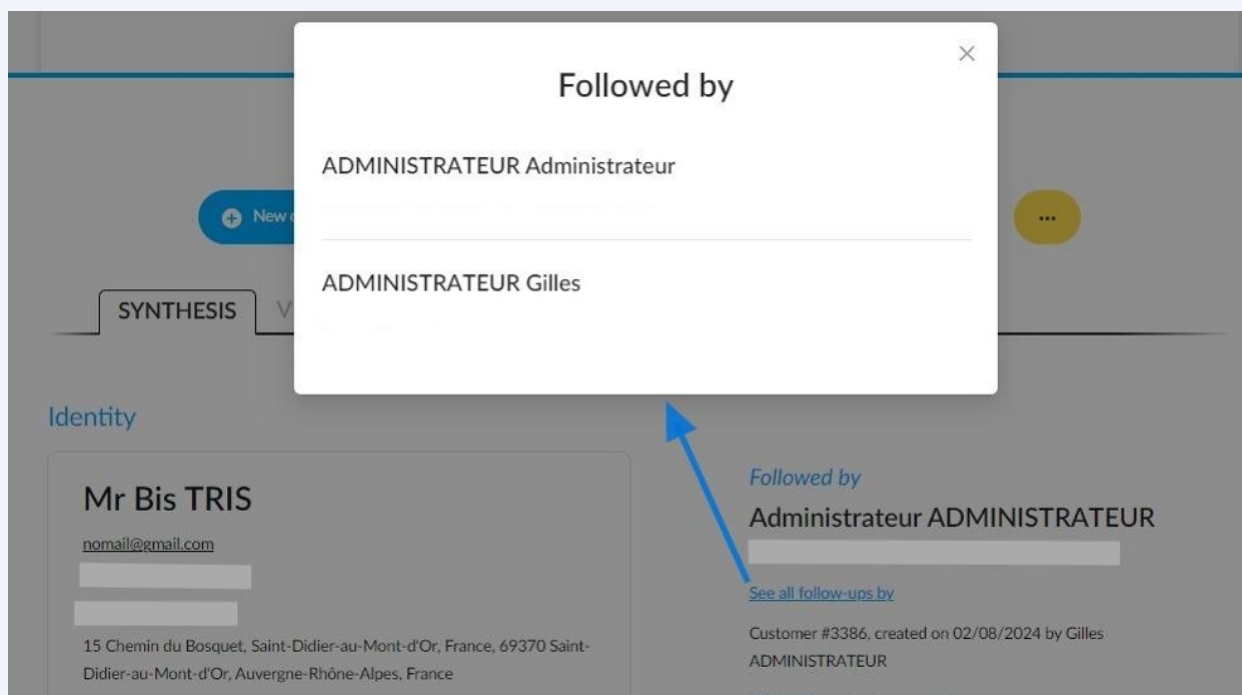
Ongoing opportunities [See all opportunities](#)

Offer number

If a customer is followed by several employees who have made offers, then they will all have in common this customer follow-up.



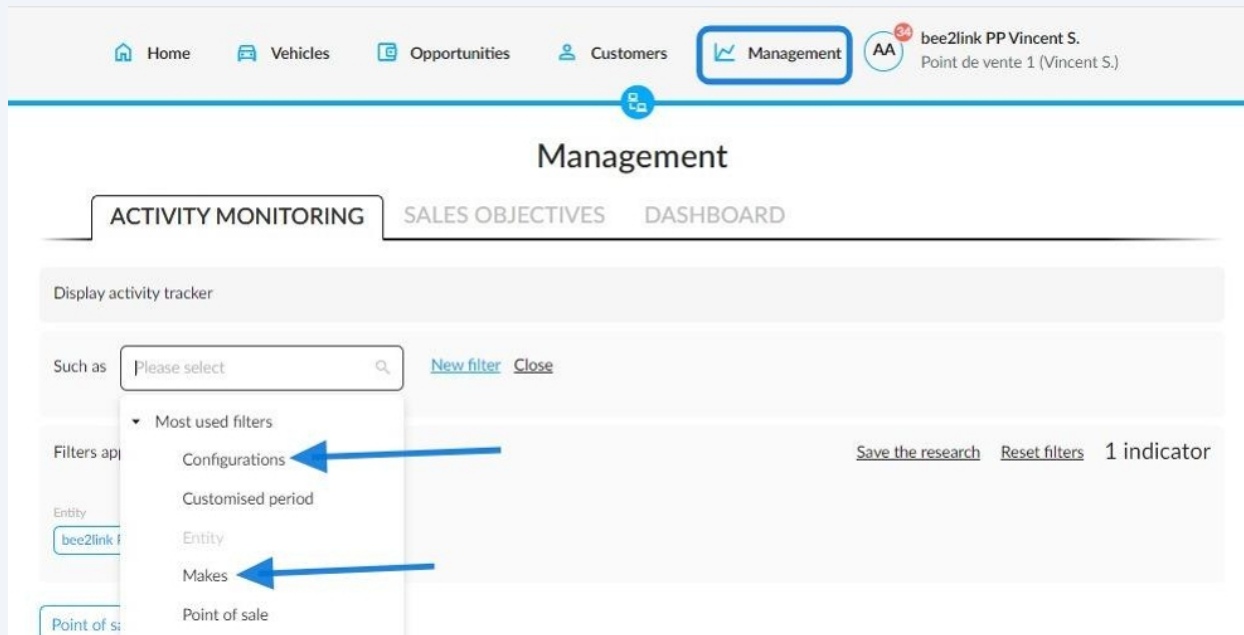
By viewing the file of this customer, a button entitled "**See all follow-ups by**" will give you access to the list of the sellers assigned to his follow-up.



Management

1 Adding new filters in the monitoring activity:

With the objective to simplify the monitoring of the commercial activity on multi-make points of sale, two new filters entitled "**Makes**" and "**Configurations**" are available in the activity monitoring in the "**Management**" module.



The screenshot displays the 'Management' module interface. At the top, a navigation bar includes 'Home', 'Vehicles', 'Opportunities', 'Customers', and 'Management' (highlighted with a blue box). A user profile 'AA' for 'bee2link PP Vincent S.' is visible. Below the navigation bar, the 'Management' title is centered, with tabs for 'ACTIVITY MONITORING', 'SALES OBJECTIVES', and 'DASHBOARD'. The 'ACTIVITY MONITORING' tab is active. A 'Display activity tracker' button is present. Below it, a search bar labeled 'Such as' contains 'Please select' and a magnifying glass icon, with 'New filter' and 'Close' links. A dropdown menu titled 'Most used filters' is open, listing 'Configurations', 'Customised period', 'Entity', 'Makes', and 'Point of sale'. Two blue arrows point to 'Configurations' and 'Makes'. To the right of the dropdown, there are links for 'Save the research', 'Reset filters', and '1 indicator'. On the left side, there are filters for 'Entity' (set to 'bee2link') and 'Point of sale'.

They will enable managers to divide the activity monitoring by filtering the displayed results by make and by type of vehicle.

Management

ACTIVITY MONITORING SALES OBJECTIVES DASHBOARD

Display activity tracker

Such as: Makes

Filters applied

Entity: bee2link PP Vincent S. Predefined period: Current month

Point of sale: Employees

Activity report

Opportunities created	15	1
Validated offers	2	0
Appointments made	3	1

In order to filter the vehicles by type, select the "Configurations" filter:

Management

ACTIVITY MONITORING SALES OBJECTIVES DASHBOARD

Display activity tracker

Such as: Configurations

Filters applied

Entity: bee2link PP Vincent S. Predefined period: Current month

Point of sale: Employees

Activity report

Opportunities created	15	1
Validated offers	2	0
Appointments made	3	1

Depending on the filters applied, it will be possible to view the commercial actions of a point of sale in their entirety

or

ACTIVITY MONITORING SALES OBJECTIVES DASHBOARD

Display activity tracker

Such as Configurations UC x [New filter](#) [Close](#)

Filters applied [Save the research](#) [Reset filters](#) 1 indicator

Entity: bee2link PP Vincent S. Predefined period: Current month Configurations: UC

Point of sale: Employees

	Point de vente 1 (Vincent S.)	Point de vente 2 (Vincent S.)
Activity report		
Opportunities created	5	1
Validated offers	1	0
Appointments made	2	1
of which trial appointments	0	0
Appointments made	0	0

to display them by employee.

Such as Configurations UC x [New filter](#) [Close](#)

Filters applied [Save the research](#) [Reset filters](#) 1 indicator

Entity: bee2link PP Vincent S. Predefined period: Current month Configurations: UC

Point of sale: Employees

	Administrateur ADMINISTRATEUR	Gilles ADMINISTRATEUR	Vincent S	Vincent S
Activity report				
Opportunities created	1	5	0	0
Validated offers	0	1	0	0
Appointments made	3	0	0	0
of which trial appointments	0	0	0	0
Appointments made	0	0	0	0
of which trial appointments	0	0	0	0
Reservations	0	0	0	0

Settings

1 New: duplication of adjustments impacting market value.

A new feature is available in the pricing policy settings to simplify the work of stock managers.

Settings / Pricing policy / Sales value UV / Adjustment

The screenshot displays the 'Pricing policy' settings page. At the top, a breadcrumb trail shows 'SETTINGS > PRICING POLICY'. Below this, the 'Pricing policy' title is centered. A horizontal navigation bar contains three tabs: 'SYNTHESIS', 'SALES VALUE UV' (which is highlighted with a blue border and a blue arrow pointing to it), and 'TRADE-IN VALUE UV'. Underneath the tabs, there is a configuration section with a dropdown menu labeled 'Display the configuration' set to 'Point de vente 1 (Vincent S.)'. To the right of the dropdown are links for 'Add a new configuration' and 'Delete'. Below the configuration section is a progress indicator with four steps: 'Adjustment' (active, indicated by a blue circle), 'Impact', 'Automatic destination', and 'Professional discou'. At the bottom left, the text 'Adjustment [Modify](#)' is visible. At the bottom center, a summary line reads: 'I have a monthly discount of -1.8 %, my recoverable VAT adjustment is 0 %.'

Now they can duplicate the adjustments which apply to market values to save time when setting up parameters on the platform.

The screenshot shows a user interface for setting adjustments. At the top, there is a blue button labeled "Add an adjustment". Below it, the section "Default adjustments" is visible, with a dropdown menu showing "Type, energy". A horizontal line separates this from the "Véhicule particulier" section. Under "Véhicule particulier", there is a "Diesel" button and the text "All vehicles will be adjusted by 3 %". Another horizontal line follows. The "PEUGEOT" section is shown with a dropdown menu containing "Type, energy, models, model group". Below this, the "208" model is selected, with a "Diesel" button and the text "All vehicles will be adjusted by 6 %". A blue circle highlights the "208" model name.

Example :

I would like to duplicate the settings applied to Peugeot 208 petrol cars.

The screenshot shows a modal dialog box for duplicating settings. It has a white background and is overlaid on a blurred background of the main interface. The dialog contains the following elements: a "Model group *" dropdown menu with "208" selected; a "Model *" dropdown menu with "All" selected; a checked checkbox with the text "I would like to take into account the mileage adjustment"; a section titled "Set the values" with the text "All vehicles will be adjusted by" followed by a text input field containing "6" and a percentage sign "%"; a blue link labeled "Add a period"; and four buttons at the bottom: "Save" (blue), "Cancel" (yellow), "Duplicate" (yellow, highlighted with a blue circle), and "Delete" (yellow).

When clicking on the "**Duplicate**" button, a new window with the same conditions and criteria as those formerly set will open. Then, all you have to do is transpose or modify them to apply them to another car.

Make *

PEUGEOT

Model group *

208

207 AFFAIRE

207 CC

208

208 AFFAIRE

3008

3008 AFFAIRE

[Add a period](#)

Save

Cancel

You will be able to repeat this process on the vehicle initially duplicated.

Reminder: an error message will display in case a user tries to save an already-existing adjustment. Two identical adjustments cannot coexist.

Default adjustments

Type, energy

Véhicule particulier

Diesel All vehicles will be adjusted by 3 %


PEUGEOT

Type, energy, models, model group

208

Essence sans plomb For : Véhicule particulier All vehicles will be adjusted by 6 %

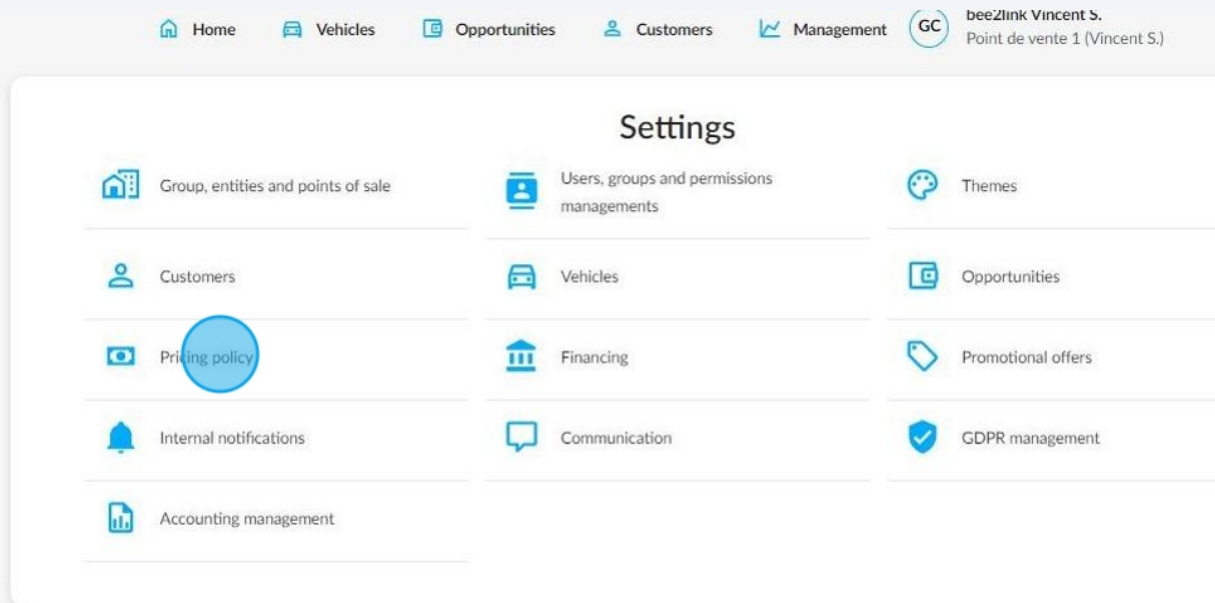
3008

Essence sans plomb  For : Véhicule particulier All vehicles will be adjusted by 6 %

2 New setting to define the recipients of quotation requests:

To make the sending of quotation requests to automotive professionals more efficient, a new setting has been integrated into the platform.

Settings / Pricing policy



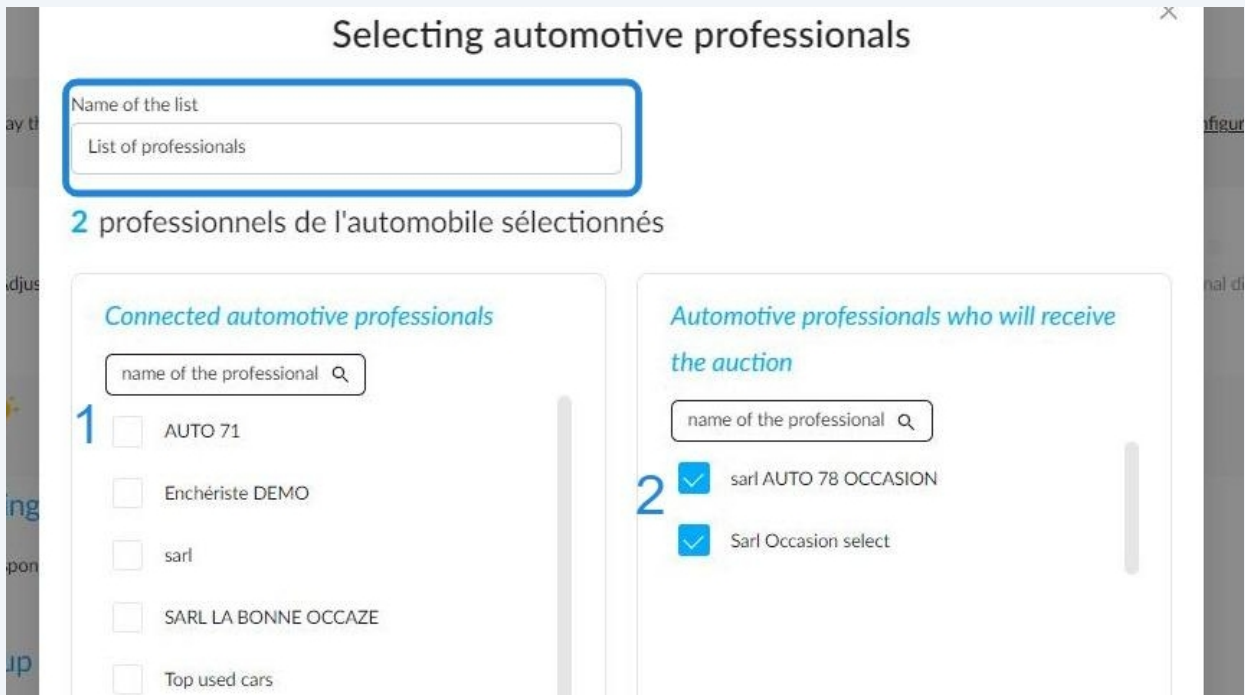
It is available in the settings of **pricing policy**, in the "**Sales value UV**" (1) section, in the menu which enables you to set the automatic destinations of UVs (2).

Settings / Pricing policy / Sales value UV / Automatic destination

When creating the list, add a title and then select in the left-hand column **(1)** automotive professionals to whom you wish to send quotation requests.

The professionals chosen by the distributor will be listed in the right column **(2)**. By unticking the box next to a professional's name, the dealer will remove him from the recipients list.

Once the list is set, the dealer will have to "**Save**" it by using the button designed for this purpose at the bottom of the window.



They will also get the possibility to cancel the changes by clicking on the **"Reset"** button or decide to **"Cancel"** this list if they need to.

