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OpenFlex

Updates 1.79

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Please find out what's new on the platform.

Vehicles

1. Recognition of warranty wording entered using keyboard:

To avoid having to scroll through all the drop-down menus when selecting a warranty, the search has been made more efficient thanks to the possibility of manually entering their names.

This new behaviour has been integrated into all the fields where a warranty is entered, when adding or modifying it during the following steps:

- the modification of a vehicle,
- the change of status,
- the ownership transfer of a vehicle.

The screenshot displays a form for entering vehicle warranty information, divided into three sections: **Warranty**, **Origin**, and **Other data**.

Warranty Section:

- Warranty name ***: A search input field containing 'Alf'. A blue arrow points to the search icon. Below the input, a dropdown menu is open, showing 'Alfa Romeo Certified' and '36 month'.
- Type of warranty period ***: A dropdown menu with 'Label' selected.

Origin Section:

- Seller / Buyer**: A dropdown menu with 'Select a value'.
- Purchasing source**: A dropdown menu with 'Select a value'.
- Previous owner**: A text input field with the placeholder 'First name, surname or compa...'.

Other data Section:

- Type of tyres**: An empty text input field.
- Factory code**: An empty text input field.

2. New way of managing and monitoring automatic transfers:


From now on, as part of the automatic transfers, employees in charge of processing transfers will be notified by email to indicate the transfer price of the vehicle being transferred via an opportunity.

This way, the employees notified will be the same as those designated to validate transfers manually from stock to stock.

Vehicles


SYNTHESIS LIFELINE PUBLICATIONS SESSIONS ▾

Set up vehicles ownership transfers

 *By enabling vehicle transfers, your inventory will be accessible to the configured entities/stores.*

I would like to activate the ownership transfer

Yes ▾

 *Employees will be notified when a new manual assignment request is made and when an automatic assignment is made, so that they can enter the assignment price. They will also have access to the list of transfers to be validated from the home page.*

By the following salespersons : *

Administrateur ADMINISTRATEUR ×

Vincent S ×



Elliot NESS ×

Gilles ADMINISTRATEUR ×

For the following entities and/or points of sale *

The process will be as follows:

An alert is generated in the form of an e-mail sent to the employees responsible for monitoring transfers. They will be asked to enter a transfer price following the validation of an order for a transferable vehicle.




TRANSFER AUTOMATICALLY VALIDATED


Hello Vincent S,

A transfer has been validated automatically following the sale of the DACIA Jogger TCe 110 7 seater vehicle on 06/11/2024 at 17:18 by Administrator ADMINISTRATOR assigned to [snc2link POP Laurent S. Point of sale: 1 \(Laurent T3\)](#).

*You must enter a transfer price to finalize the transaction from the vehicle file.


Additional vehicle information

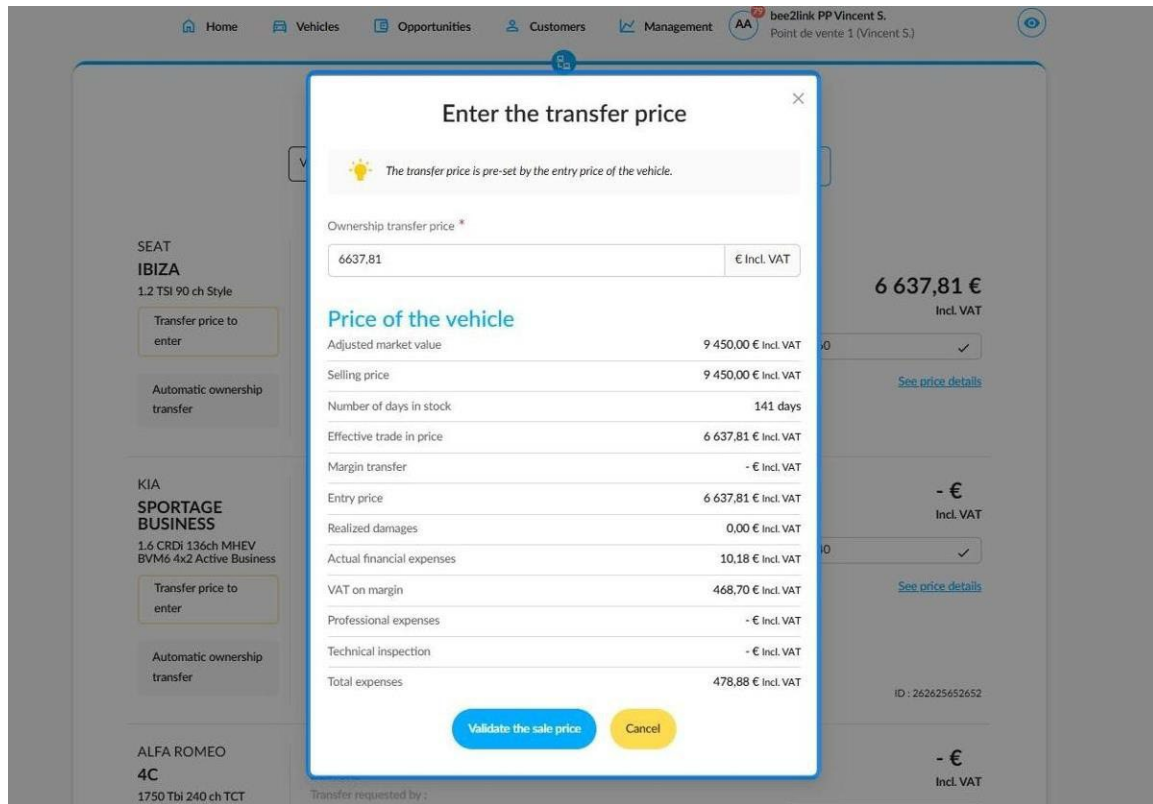
Policy Number	Matriculation	WINE
512_38783	GF452GL	UU1DJF00X8834701
Date MEC	Milage	Days of stock
18/03/2022	25,639 km	94


Vehicle Details

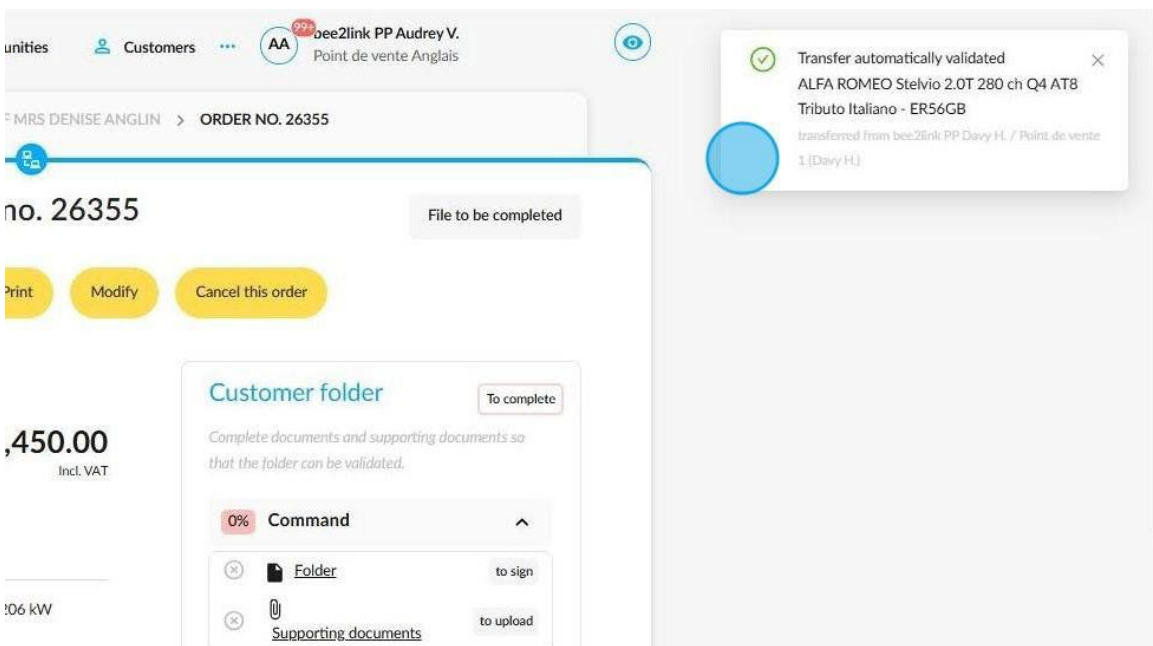
Please enter the sale price of the vehicle by going directly to the details of the vehicle by clicking on the button below.

Access the vehicle details

By clicking on the link in the e-mail, they will be taken to the list of transfers to be validated. They will then be able to indicate a transfer price by clicking on the 'See price details' button:



As for the entity making the transfer request, it will be notified once the transfer price has been entered:



Filters have been added accordingly to monitor the processing of manual and automatic transfers.

Ownership transfers

Vehicle, registration number, internal number, chassis or customer number Filters

Display sorted by request date

Such as Please select New filter Close

Filters applied

Ownership entity

Manual transfer

Automatic ownership transfer

[Reset filters](#) 23 ownership transfers

SUZUKI S-CROSS 1.6L DDIS Allgrip Style	Used - Professional AA895BG Transfer requested by: Farah BEN NASR - bee2link PP Marie V.	£-
<input type="text" value="Transfer price to enter"/>	Date of first registration: 07/08/2017 Mileage: 47,800 mi Entity: bee2link PP Audrey V.	<input type="text" value="28290"/> <input checked="" type="checkbox"/>

The type of transfer will also be indicated on the thumbnail of the vehicles displayed in the table.

The status of the transfer will also be displayed (*Validated/Refused/Transfer price to enter*).

Ownership transfers

Vehicle, registration number, internal number, chassis or customer number Filters

BMW SERIE 1 F21 LCI2 M140i 340 ch <input type="text" value="Validated"/> Automatic ownership transfer	Used - Individual QS541BG Transfer requested by: Audrey VILLIEN - bee2link PP Marie V. (+33 6 83 61 91 83) Date of first registration: 04/04/2018 Mileage: 52,000 mi Entity: bee2link PP Audrey V. Point of sale: Stock Point de vente 1 (Audr...): 652 days Nov 4, 2024	£47,300.00 Incl. VAT
RENAULT MEGANE IV ESTATE Mégane Blue dCi 95 Life <input type="text" value="Validated"/> Manual transfer	Used - Individual FG520QS Transfer requested by: Audrey VILLIEN - bee2link PP Marie V. (+33 6 83 61 91 83) Date of first registration: 05/31/2019 Mileage: 45,000 mi Entity: bee2link PP Audrey V. Point of sale: Stock Point de vente 1 (Audr...): 479 days Oct 4, 2024 ID: 5555	£9,176.13 Incl. VAT
OPEL CASCADA	Used - Professional AV005AV	£38,800.00 Incl. VAT

3. Stock auctions: new commentary for automotive professionals:

A new field has been added to the "Other data" section, which allows users to insert comments for professionals. It can be filled in from the vehicle file.

Vehicles/Synthesis/Modify/Other data/Comment destined to professionals.

Other data

Type of tyres Select a value <input type="button" value="v"/>	Factory code A1SG6 MFA6WS; AL1 <input type="text"/>
Car registration document date Select date <input type="button" value="📅"/>	Formula number XXXXABXXXXXX <input type="text"/>

Comment Vehicle maintained by an entity of our group.	Comment destined to professionals High standard car, service manual complete.
---	---

Once added, the comment for professionals will be visible at the bottom of the synthesis among the additional information:

Additional information	Tags <input type="button" value="+ New"/>
Vehicle maintenance	Comment Vehicle maintained by an entity of our group.
Damaged vehicle No	Rolling vehicle No
Repairs detail -	Up-to-date service logbook No
Roadworthiness date -	Date of next technical control -
Status	Comment destined to professionals High standard car, service manual complete.
Used car origin Import	First hand No
Owner count Not specified	Sales warehouse No
Import No	Vehicle planned for export No
External number -	
Origin	
Seller / Buyer -	Previous owner -
Purchasing source -	

As for car professionals, they can see it by consulting the details of vehicles put up for auction.

ALPINE A110

SYNTHESIS

EQUIPMENT AND OPTIONS

ATTACHED DOCUMENTS

ALPINE A110

1.8T 300 CH
S

 ESSENCE SANS PLOMB

 19 CV / 300 CH

 2D

 BLACK

 WHITE

 BOÎTE AUTOMATIQUE

 596 (g/km)



 -

TG-569-VF

Chassis number

WER86346748367477

Put into service date

01/09/2024

Mileage

45,653 km not
guaranteed

First hand

No

Owner count

Not specified

Importation

No

Purchasing source

-

UV Origin

Import

Storage location

Point de vente 1 (Vincent
S.)



Technical characteristics

Additional information

Storage location

Address

16 Rue Guepet, 71100, Chalon-sur-Saône

Phone

Comment

High standard car, service manual complete.

Opportunities

1. Importation of pictures related to the vehicle's counter-estimate:

In the case of a used vehicle counter-estimate, you can now associate visuals to the trade-in concerned.

The **Trade-in** tab has been renamed "**Valuation and costs**" to include cases where the trade-in takes place using tools external to OpenFlex.

You can access it from the used vehicle file.

VEHICLES > ALFA ROMEO MITO

ALFA ROMEO MITO Pré-rentée
[State in "Entrée physique"](#)

Make offer with this vehicle Modify Print Modifying the configuration ...

SYNTHESIS EQUIPMENT AND OPTIONS ADDITIONAL PRODUCTS OTHERS ▾

ALFA ROMEO MITO **£800.00** Incl. VAT
Adjusted market value: **£6,190.00** Incl. VAT
Powered by *Autovista France*
[See the details](#)

1.4 MPI MULTIAIR START & STOP
105
LATINA

ESSENCE
105 CH / 77 KW
3D

Used - Professional
DF415GF

Type
Véhicule particulier
Police number
-

Visuals
Attached documents
Publications
Valuation and costs
History
After-sales service history

← →


[Add media \(0 pictures, 0 videos\)](#) [Technical characteristics](#)

A specific insert has been designed to integrate images:

SYNTHESIS EQUIPMENT AND OPTIONS ADDITIONAL PRODUCTS VALUATION AND COSTS ▾

See the details of the estimate

Your trade-in estimate **£1.00**
Incl. VAT




Estimate - Tour of the vehicle

No Data

Counter-estimate - Tour of the vehicle

+
Add a visual
Max. size: 20Mo




You can preview the image, download it or delete it by hovering your mouse over it.

Estimate - Tour of the vehicle

No Data

Counter-estimate - Tour of the vehicle

+
Add a visual
Max. size: 20Mo



A new filter called **‘Trade-in’** has been added to the vehicle stock page, so you can easily search for vehicles that have been traded in.

The screenshot shows the 'Vehicles' page interface. At the top, there are buttons for 'New', 'Create a stock auction', 'Export', and a menu icon. A search box contains 'DF415GF'. Below this, there are filter sections. The 'Such as' section has a dropdown menu set to 'From a trade-in'. A search icon is next to it, and a dropdown menu is open showing 'Yes' and 'No' options. Below the filter, there's a 'Filters applied' section with 'Entity: bee2link PP Audrey V.'. At the bottom, there's a 'Sorted by' dropdown set to 'Entry into stock' and a list of column headers: Internal, Make, Model, Version, Type of ve..., Status, Publication status, Energy, Guara..., Warranty, and Trade-in.

This information is displayed in a specific **"Trade-in"** column, which must be added manually using column management.

Internal...	Make	Model	Version	Type of ve...	Status	Publication status	Energy	Guara...	Warranty	Trade in	
222323232	CUPRA	BORN	204 ch - Batterie L - V	UC - Individual	Stock de vente	Current offer	Not published	Electrique	No	Constructeur	✓
AV9999	AUDI	Q7	3.0 V6 TDI 245 DPF - Quattro Ambition Luxe Tiptronic A 7 pl	UC - Professional	Stock de vente		Not published	Diesel	No	-	✓
av999	LANCIA	MUSA	1.3 Multijet 14v 95 ch DPF Stop&Start - Gold DPF	UC - Professional	Stock de vente		Not published	Diesel	No	-	✓
AV67	MINI	HATCH 3 PORTES F56 LCI II	Cooper S 178 ch BVA7 - Finition John Cooper Works	UC - Individual	Entrée physique		Not publishable	Essence	No	Constructeur	✓
AV45666	CITROËN	DS3	THP 150 - Sport Chic	UC - Individual	Stock de vente	Reserved for ca...	Not publishable	Essence	No	Garantie DR	✓
AV67	AUDI	A4 BUSINESS	2.0 TDI 120 DPF - Business Line	UC - Individual	Sortie		Not publishable	Diesel	No	bee2link warranty	✓
48	BMW	SERIE 2 ACTIVE TOURER F45 LCI	216d 116 ch - Lounge	UC - Individual	Sortie		Not publishable	Diesel	No	Constructeur	✓
av996	FIAT	500X	1.3 Multijet 95 ch - Pop	UC - Professional	Livraison		Not publishable	Diesel	No	-	✓
av966	AUDI	Q4 E-TRON	45 265 ch 82 kWh quattro - Executive	UC - Individual	Livraison		Not publishable	Electrique	No	bee2link warranty	✓
AV216516	SKODA	OCTAVIA	1.5 TSI 150 ch ACT - Business	UC - Professional	Livraison		Not publishable	Essence	No	-	✓
AV5156	AUDI	A4 ALLROAD QUATTRO	ultra 2.0 TFSI 252 S Tronic 7 - Design	UC - Individual	Livraison		Not publishable	Essence	Yes	12 mois	✓
111111111	AUDI	A5 SPORTBACK	40 TFSI 190 S tronic 7 - Design	UC - Individual	Livraison		Not publishable	Essence	No	Garantie M	✓
AV99655	AUDI	A4	1.8 TFSI 120 - Ambiente	UC - Professional	Pré-remise	Reserved for ca...	Not publishable	Essence	No	-	✓

There is also a sorting system to differentiate between vehicles from trade-ins and those from other origins:

The screenshot shows a 'Manage sorting' dialog box with the following details:

- Manage sorting in order of importance
- Trade in: No + Yes
- Adding sorting: +
- Buttons: Save, Reset, Cancel

The background table has the following columns: Type of ve..., Status, Publication status, Energy, Guara..., Warranty, Trade in.

Type of ve...	Status	Publication status	Energy	Guara...	Warranty	Trade in
UC - Individual	Stock de vente	Reserved unlim...	Not publishable	Diesel	-	bee2link warranty
DC	Livraison	Not publishable	Essence	No	Garantie OR	X
NC	Sortie	Not publishable	Electrique	No	-	X
UC - Individual	Livraison	Not publishable	Diesel	Yes	bee2link warranty	X
UC - Individual	Livraison	Not publishable	Essence	No	bee2link warranty	X
UC - Individual	Stock de vente	Reserved unlim...	Not publishable	Essence	-	Constructeur

2. New button to duplicate a saved search:

To make it easy to adapt a search to different situations, we have made it possible to duplicate saved searches.

To do this, click on **"Modify search"**.

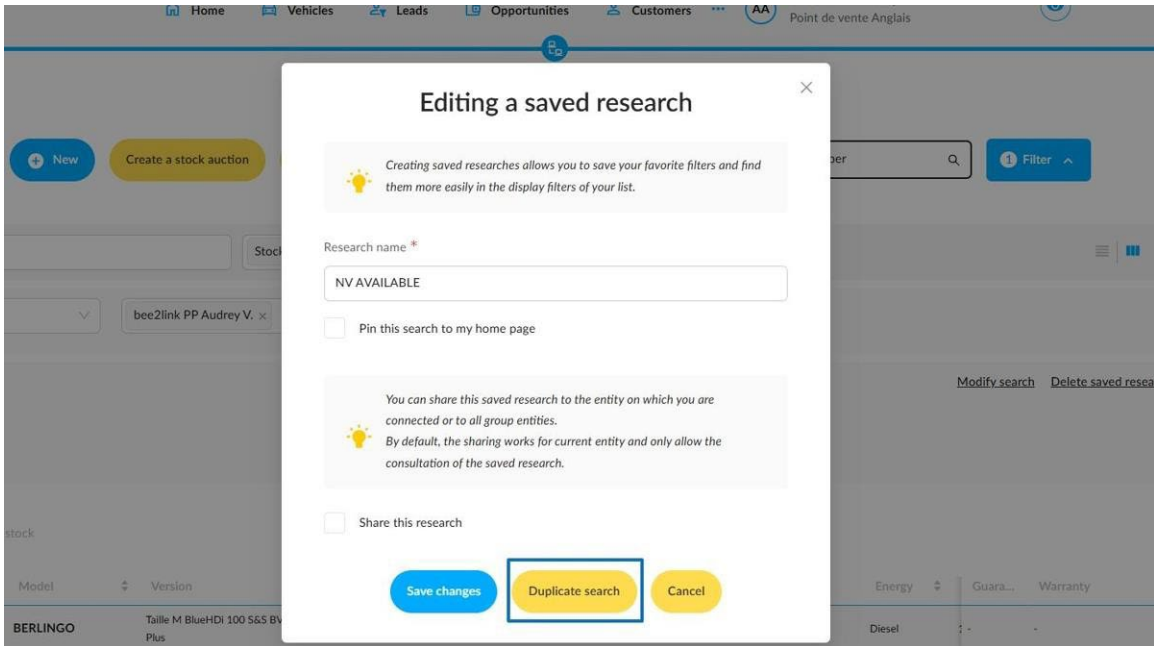
The screenshot shows a 'Vehicles' header with the following elements:

- Buttons: New, Create a stock auction, Export, ...
- Search bar: Vehicle, registration number, internal number, chassis or customer number
- Filter button: Filter

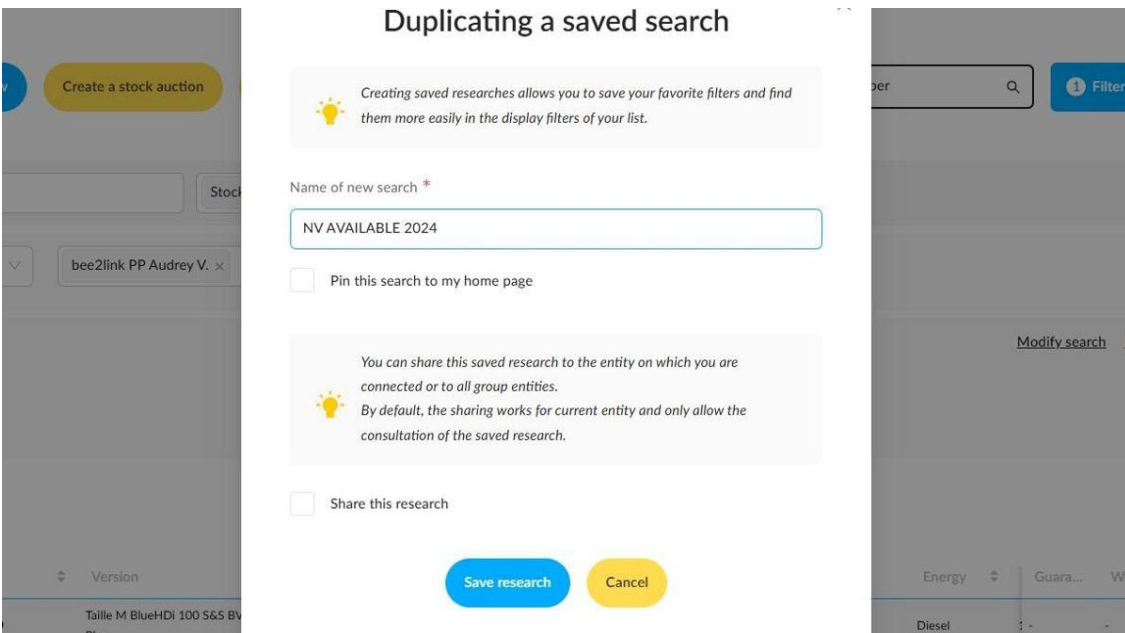
The table below has the following columns: Model, Version, Type of ve..., Status, Publication status, Energy, Guara..., Warranty.

Model	Version	Type of ve...	Status	Publication status	Energy	Guara...	Warranty
BERLINGO	Taille M BlueHDI 100 S&S BVM6 - Plus	NC	Stock de vente	Current offer	Not published	Diesel	-
FORMENTOR	1.5 TSI 150 ch DSG7 - Business Edition	NC	Stock de vente	Reserved unlim...	Not publishable	Essence	No

An editing window will open, giving you a range of options. You can duplicate a search to use it as a basis for adapting it to different needs.



The duplicated search can be shared before it is saved, if you wish.



4. Availability of offers for merchant lot orders:

A new intermediate stage is now available for processing orders intended for merchants.

An offer can be printed to make a proposal to an automotive professional.

This step is optional; printing an offer to a professional is not equivalent to validation.

You can place the order directly to finalise your opportunity.

Offer n°26343 In progress

[Place the order](#) **[Print offer](#)** [Abandon this offer](#) [Duplicate](#)

1 purchased vehicle [Choose a vehicle\(s\)](#)

ALFA ROMEO
MITO
1.4 MPI MultiAir Start & Stop
105 Latina

Reserved for customers

[Additional information](#)

Used - Professional
DF415GF

No information	6 CV	134 (g/km)

PIS: 10/13/2010 | Mileage: 115,236 km | Energy: Essence

£800.00
Incl. VAT
£800.00
Excl.

ID: 56933 [Delete the vehicle](#)

Summary

Display amounts : Incl. VAT Excl.

Vehicle purchased (1 vehicle)

Initial total amount: £800.00

Final total amount: £800.00 [Modify](#)

Actual commercial margin: £0.00

By default, the offer will always be excluded of VAT.

Print offer

Documents to be printed

Offer: **Excl. VAT** Incl. VAT

Vehicle information:

Attached documents:

[Print](#) [Cancel](#)

Example:



PROFESSIONAL OFFER NO. 26343

USED VEHICLE

Done on 06/11/2024
Seller ADMINISTRATEUR Administrateur

Point de vente Anglais

16B Rue Guepet 71100 - Chalons-sur-Saône
Phone
Email
Company registration number

CUSTOMER

Company sarl quality VI
Company registration number
Last name PONS Patrick
Address 14 Rue Royale
City Paris
Professional phone
Mobile phone +44 7336 547893
Email
Profession

OUTSTANDING BALANCE (EXCL. VAT)

800.00 €

1 PURCHASED VEHICLE

Police N°	Vehicle	First registration date	Numberplate	Chassis	Mi	Color	Price Excl. VAT (€)
56933	ALFA ROMEO MITO 1.4 MPI MultiAir Start & Stop 105 Latina	13/10/2010	DF415GF	VF84848484511952	115,236	Blanc	800.00
TOTAL (€)							800.00

Customer's signature
Preface with "read and approved"

Distributor stamp
Date and signature of the person in charge

5. Optimised scheduling of test-drive appointments.

Previously, when creating a test-drive appointment, the following information was available:

- The schedule of staff who are accompanying customers
- Customer's first and last name
- The number of the opportunity linked to the appointment
- The model tested with its registration number
- The name of the point of sale where the test-drive will take place

Schedule the test drive of Test CLIENT on opportunity 3731

After the creation of the appointment, you can find it into the diary on front home page.

Escorting collaborator *

Test BENJAMIN

Select a time slot

Today < > Nov 3 - 2024

Month Week Day

	Sun 11/3	Mon 11/4	Tue 11/5	Sat 11/9
all-day				
08:00 AM				
08:30 AM				
09:00 AM				
09:30 AM				

Test appointment for Test BENJAMIN with Test CLIENT on opportunity 3731 with the RENAULT AUSTRAL - CF-568-UI - Vincent Anglais

Test appointment for Test BENJAMIN with

A wide range of information will be displayed in addition to that which was visible in the past by hovering over an appointment:

- The name of the salesperson who will accompany the customer during the test drive.
- The name of the employee using the vehicle (*if no employee is assigned to this vehicle, no data will be displayed*).
- The name of the sales assistant responsible for the customer follow-up.
- In the event of cancellation of the appointment, the reason and the name of the person who carried out an action which led to the cancellation of the test drive will be indicated (*unlimited reservation, 48-h reservation, sale...*).

The screenshot shows a web-based scheduling interface. At the top, there is a dropdown menu for 'Escorting collaborator *' with 'Sophie TURNER' selected. Below this is a 'Select a time slot' section with navigation buttons for 'Today', '<', and '>', and a date range 'Nov 10 - 16, 2024'. To the right are view toggles for 'Month', 'Week', and 'Day'. The main area is a calendar grid with columns for days and sub-columns for 'Vehicle' and 'Sophie TURNER'. A tooltip is displayed over a cell on Sunday, Nov 10, at 11:00 AM. The tooltip contains the following information:

- Test appointment DC with John BROCK on the opportunity 15012 - Point de vente Anglais**
- Companion: Emma BIS**
- Employee assigned to the vehicle: Sophie TURNER**
- Customer follow-up: Administrateur ADMINISTRATEUR**
- Reason for cancellation: The test drive appointment for the vehicle HYUNDAI BAYON Intuitive - FG253KM for the customer John BROCK was cancelled by Administrateur ADMINISTRATEUR when the unlimited reservation for the vehicle was made.**

The calendar grid shows a yellow highlight for the appointment at 11:00 AM on Sunday, Nov 10. The time slots shown are 11:00 AM and 11:30 AM.

Settings

1. Predefined integration of the point-of-sale stamp on sales documents:

In order to save time and avoid having to add the stamp of the point of sale where the user is connected to each sales document, we have adopted the point of sale stamp used for electronic signatures and made it appear by default when sales documents are edited.

It can be found in the settings of **groups, entities and points of sale**. Go to the **"Others"** tab to find the menu entitled **"Stamp"**.

The screenshot shows the settings page for 'Verkaufsstelle PSA Retail Allemagne 2'. The breadcrumb trail is 'EINSTELLUNGEN > GRUPPE, EINHEITEN UND VERKAUFSSTELLEN > PSA RETAIL ALLEMAGNE 2'. The page title is 'Verkaufsstelle PSA Retail Allemagne 2'. There are two buttons: 'Ändern' (teal) and 'Einen Dienst hinzufügen' (grey). Below are tabs: 'ZUSAMMENFASSUNG', 'MACHT VERTEILT', 'DIENSTLEISTUNGEN', and 'ANDERE' (with a dropdown arrow). The 'ANDERE' dropdown is open, showing 'Stempel' selected. Under 'Identität', there is a card for 'PSA Retail Allemagne 2' with details: '385345205', 'Widdersdorfer Str. 345 Complément d'adresse, 50993 Köln, DE, Europe/Paris', and a 'DE' button. To the right is a 'Bildmaterial hinzufügen' section with a plus sign and supported extensions: '.png / .jpg / .jpeg'.

If it's not already there, you can add a stamp by downloading it from your computer or dragging it with your mouse.

The screenshot shows the same settings page, but with the 'STEMPEL' dropdown selected. Below the tabs is a warning message: 'Ohne diesen Parameter funktioniert die elektronische Unterschrift nicht.' Below the warning is a 'Den Stempel des Händlers hinzufügen' section with a plus sign and supported extensions: '.png / .jpg / .jpeg'.

It can be previewed, downloaded or deleted by hovering over it with the mouse.

EINSTELLUNGEN > GRUPPE, EINHEITEN UND VERKAUFSSTELLEN > PSA RETAIL ALLEMAGNE 2


Verkaufsstelle PSA Retail Allemagne 2

Ändern | Einen Dienst hinzufügen

ZUSAMMENFASSUNG | MACHT VERTEILT | DIENSTLEISTUNGEN | STEMPEL ▾

Stempel des Vertriebers

💡 Ohne diesen Parameter funktioniert die elektronische Unterschrift nicht.




Generic documents will be the only ones to benefit from this innovation.

> Customer benefits

Label	Price Including VAT €
OP VN - 1200	1.500.00 €
TOTAL	1.500.00 €

COMMENTS

**BALANCE 97,492.00 €
INCLUDING VAT**

<p>Distributor stamp Date and signature of the person in charge</p> 	<p>Customer's signature Preface with "read and approved"</p>
---	--

*Done in 2 copies
1st copy : customer
2nd copy : distributor*

2. Restrictions on trade discounts applicable to DVs and UVs:


It is now possible to set maximum authorised discounts for DVs and UVs in the opportunities settings.




These discounts, entered in the form of a percentage or a maximum sum not to be exceeded, can be configured by destination (*individuals/companies*) and can be set up from a 'HOLDING' type entity for all the entities in a group.

For DVs, the maximum authorised discount percentage will be applied taking into account the price of the vehicle including options.

Settings/Opportunities/Managing authorised discounts

Managing authorised discounts

 Leave the fields empty if you do not wish to limit discounts. Changing the discount limits does not recalculate the discounts entered in your stock and offers.

The maximum discount allowed for NC to individuals is	<input type="text" value="3"/>	%	and	<input type="text" value="4"/>	%	for companies.	
The maximum discount allowed for DC to individuals is	<input type="text" value="5"/>	%	and	<input type="text" value="6"/>	%	for companies.	
The maximum discount allowed for UC to individuals is	<input type="text" value="400"/>	£	and	<input type="text" value="550"/>	£	for companies.	


The maximum authorised discount applies to the price of the vehicle with options in your stock and in an offer.




For UVs, the maximum percentage discount allowed will be based on the vehicle's selling price.

Or

it will take into account the maximum discount amount that must not be exceeded if a sum has been inserted.

Managing authorised discounts

 Leave the fields empty if you do not wish to limit discounts. Changing the discount limits does not recalculate the discounts entered in your stock and offers.

The maximum discount allowed for NC to individuals is	<input type="text" value="3"/>	%	and	<input type="text" value="4"/>	%	for companies.	
The maximum discount allowed for DC to individuals is	<input type="text" value="5"/>	%	and	<input type="text" value="6"/>	%	for companies.	
The maximum discount allowed for UC to individuals is	<input type="text" value="400"/>	£	and	<input type="text" value="550"/>	£	for companies.	

The maximum authorised discount applies to the selling price of the vehicle in your stock and in an offer.

Example :

adding multiple discounts to a DV. The discount percentage entered in the settings cannot exceed a certain amount.

Discounts

Label *
Commercial discount

Amount of the discount
1000 £ Incl. VAT ▾

Label *
Commercial discount 2

Amount of the discount
400 £ Incl. VAT ▾

The total of discounts cannot exceed 5 %, or £1,305.00.

Example: adding a discount to a UV that exceeds the maximum authorised amount.

Discounts

Label *

Commercial discount

Amount of the discount

1000

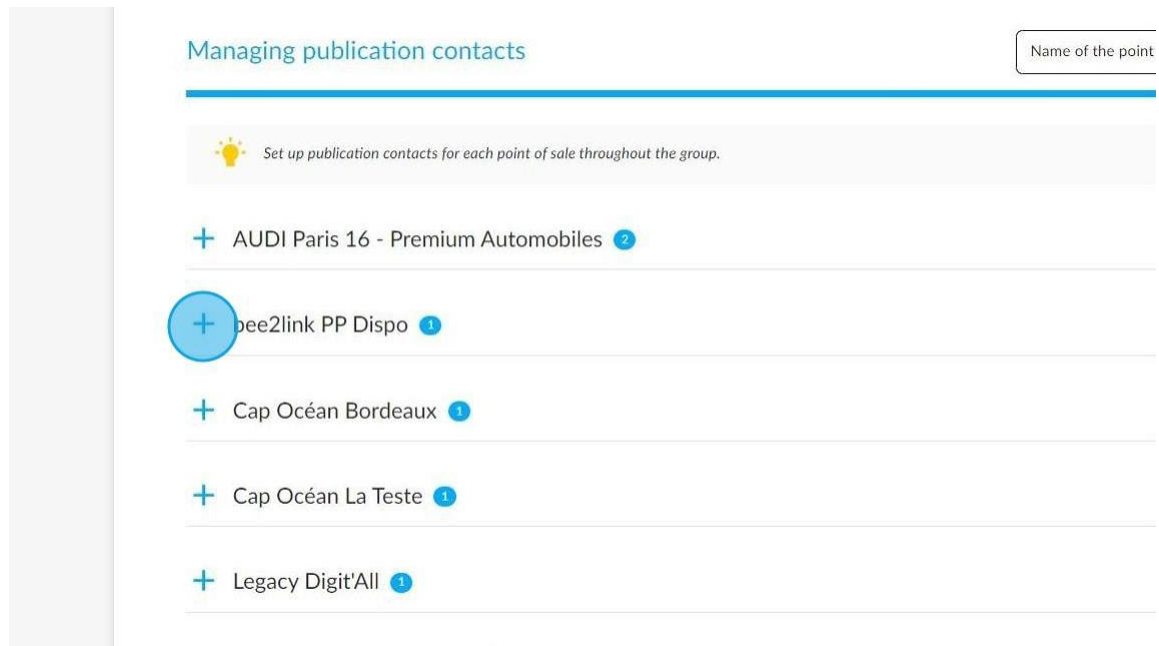
£ Incl. VAT ▾

[Add a discount](#)

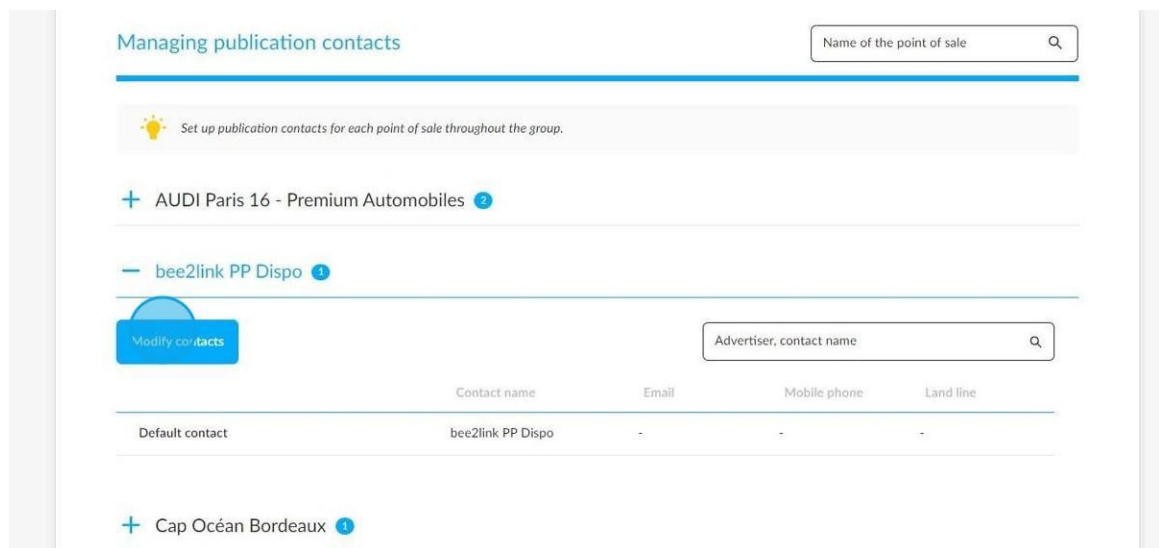
The total of discounts cannot exceed 0.946 %, or £400.00.

3. Managing publication contacts by advertiser contract:

Presently, it is possible to set up publication contacts for each point of sale in a group.
Settings/Vehicles/Publications/Managing publication contacts



Select the point of sale of your choice and press the "**Modify contacts**" button.



Then, 2 methods will be available to define a contact on publications:

-The first solution is to define a contact which will be used as the default contact for all advertisers who will display ads from the point of sale in question.

The contact details of the default contact can be those of the point of sale or those of a personalised contact.

The contact of a member of the point of sales' sales team can be selected at this stage.

No comment defined

Managing contacts for a point of sale

Default point of sale contact bee2link PP Dispo

Choice of contact *

Add a personalised contact

Contact name *

Select a contact

Search for a user.
You can also enter a personalised label.
To change a user's details, please contact an account administrator or the user concerned.

I wish to add a contact by advertiser contract

Save changes Cancel

Or else,

the second option is to add a specific contact for each advertiser contract. To do that, tick the box entitled **"I wish to add a contact by advertiser contract"**.

Choice of contact *

Add a personalised contact

Contact name *

Benjamin

Search for a user.
You can also enter a personalised label.
To change a user's details, please contact an account administrator or the user concerned.

Email

Mobile phone Land line

I wish to add a contact by advertiser contract

Advertiser contracts

Advertiser, name of the contract

In this case, each advertiser with a contract with the point of sale will have an individual contact. It must be inserted manually.

I wish to add a contact by advertiser contract

Advertiser contracts

Advertiser, name of the contract

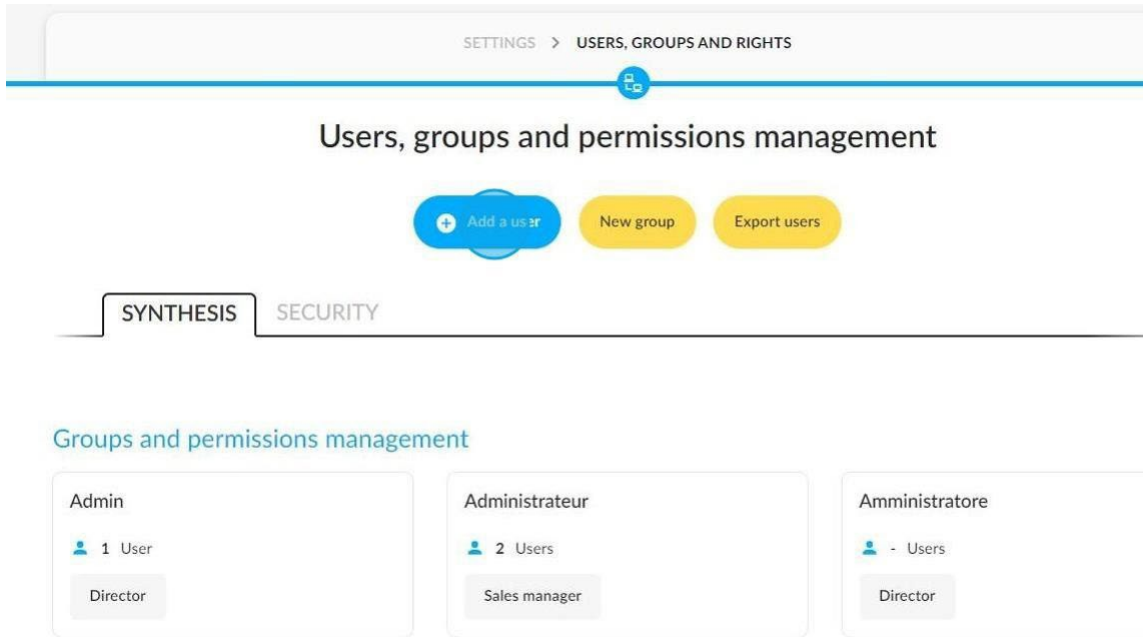
Contact name	Email	Mobile phone	Land line
Etiqcar			
PP - Etiqcar - PDV1	<input type="text"/>	<input type="text"/>	<input type="text"/>
Facebook			
PP - Facebook - Part	<input type="text"/>	<input type="text"/>	<input type="text"/>
La Centrale			
La Centrale - Blaise	<input type="text"/>	<input type="text"/>	<input type="text"/>
PP - La Centrale - Part	<input type="text"/>	<input type="text"/>	<input type="text"/>
PP - La Centrale - PD1	<input type="text"/>	<input type="text"/>	<input type="text"/>
Stamp'yt			
PP - Stamp'yt - API	<input type="text"/>	<input type="text"/>	<input type="text"/>
Test flux WAFY			
PP - WAFY - PD1	<input type="text"/>	<input type="text"/>	<input type="text"/>
Ubiflow			
Ubiflow - La centrale	<input type="text"/>	<input type="text"/>	<input type="text"/>

4. Harmonising terms in user accounts settings:

With a view to improving the clarity and the understanding of the terms used in the settings for managing user accounts, some wordings have been replaced and the presentation of some displayed data have been optimised.

The **"New user"** button has been renamed **"Add a user"**.

This new wording will also be used on the the account creation page.



SETTINGS > USERS, GROUPS AND RIGHTS

Users, groups and permissions management

+ Add a user New group Export users

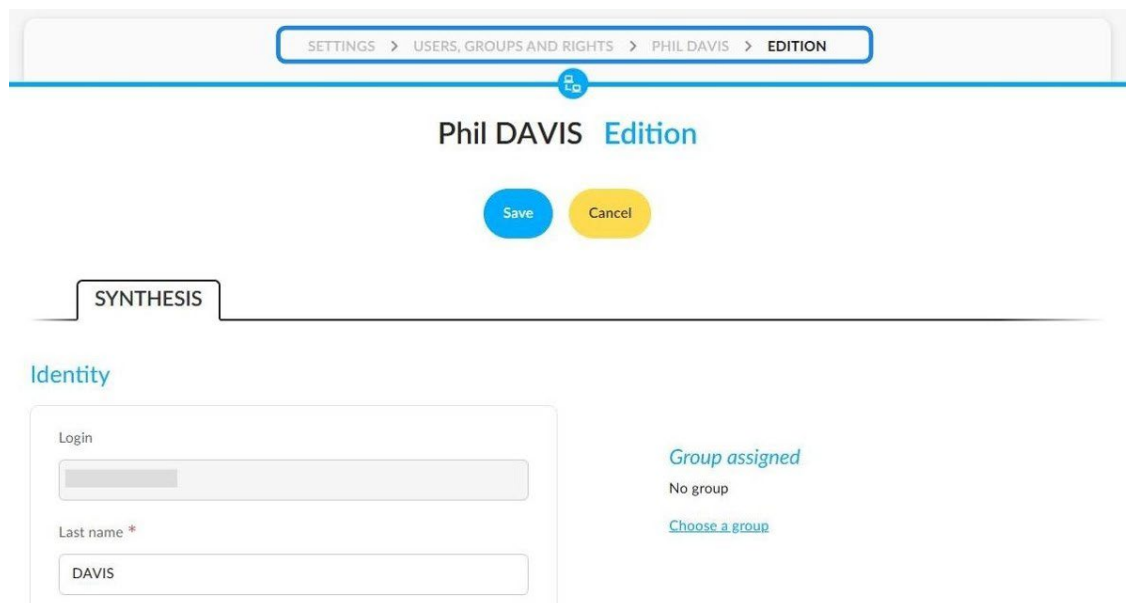
SYNTHESIS SECURITY

Groups and permissions management

Group	Users	Permissions
Admin	1 User	Director
Administrateur	2 Users	Sales manager
Amministratore	- Users	Director

Example :

View of the previous layout of the user account creation page:



SETTINGS > USERS, GROUPS AND RIGHTS > PHIL DAVIS > EDITION

Phil DAVIS Edition

Save Cancel

SYNTHESIS SECURITY

Identity

Login	<input type="text"/>
Last name *	<input type="text" value="DAVIS"/>

Group assigned
No group
[Choose a group](#)

View of the updated presentation incorporating the new wording in the path of steps followed when creating an account and in the page title.

Note: in the event of an attempt to add an already-existing account from an other entity, the behaviour when clicking on the "**Cancel**" button has changed at this stage.

In the past, the account manager was redirected on the sheet of the user whom they were about to add to their entity. From then on, the account manager will be redirected on the initial page of account and user groups management.

SETTINGS > USERS, GROUPS AND RIGHTS > ADD A USER

→ Add a user

Save Cancel

SYNTHESIS

Identity

Login

Last name *

ADMINISTRATEUR

First name *

Group assigned

No group

[Choose a group](#)

5. Management of user groups at holding company level :

In order to make the management of user groups more consistent and faster, variations have been introduced regarding their administration to allow only parent companies to manage user rights and permissions. This will avoid having to reproduce the group settings manually for each entity in a group.

At holding company level, the platform administrator will be able to create and share a group. This way, they can define the rights and permissions of each group member.

The group administrator will have access to the following buttons:

SETTINGS > USERS, GROUPS AND RIGHTS > VENDEUR VO

Group VENDEUR VO

Modify Add a user Delete Duplicate

SYNTHESIS

VENDEUR VO

1 User

Salesman Shared

Manage group permissions

Opportunities	Customers	Vehicles
The opportunities module groups together all the actions that lead to the sale of a vehicle. This service now includes insta'price, scan'price, Lead'spot and Carsell, thus facilitating the global management of an opportunity.	Create, modify, delete, reassign a customer master record. So many rights to discover in this module, also called Data'bank.	Manage visibility on the management, logistics and publication of your NV, UV and DV stock. This is the revised and optimised Carshop module.

By ticking the box below, the administrator of a holding company will activate the sharing of this user group between all entities.

This setting will take the form of a checkbox:

SYNTHESIS

Group

Name *
VENDEUR VO

Type *
Salesman

A shared user group retains the same name, the same type and the same rights for all entities. Only the entity that created the shared user group can modify it and its rights.

Share the user group with all group entities.

From an affiliated entity, the options available to a simple administrator are different: They will not be able to modify or delete this group. The holding company will be the only entity to have control at this level.

SYNTHESIS

Group VENDEUR VO

[Add a user](#) [Duplicate](#)

VENDEUR VO

1 User

Salesman Shared

The user group is configured at group level, so it cannot be modified from this login entity.

Manage group permissions

Opportunities

The opportunities module groups together all the actions that lead to the sale of a vehicle.

Customers

Create, modify, delete, reassign a customer master record.

Vehicles

Manage visibility on the management, logistics and publication of your NV, UV and DV stock.

Setting the rights of group users will also remain the prerogative of the holding company. The administrators of this entity will only be able to consult the rights of the various modules without being allowed to modify them:

