

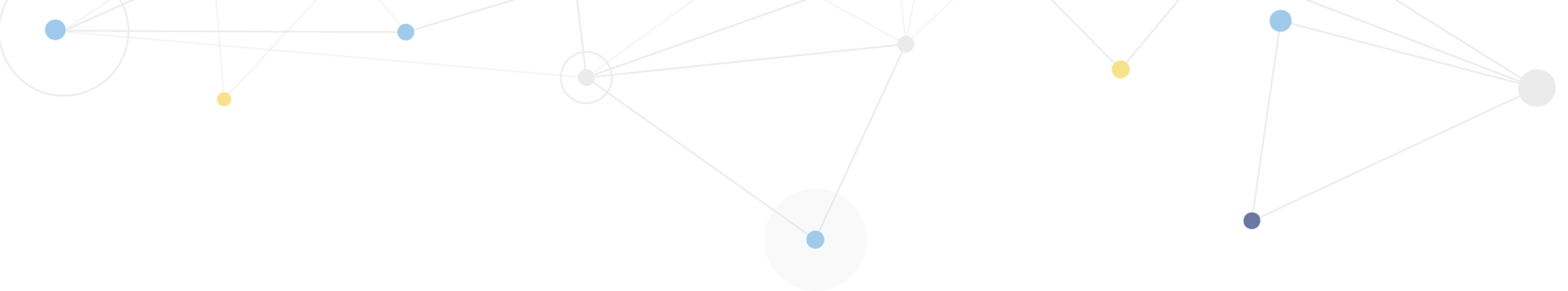
bee2link

Glossary of OpenFlex status

09/05/2025

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Vehicle and stock concepts

Vehicle and stock concepts

 Type of vehicle:

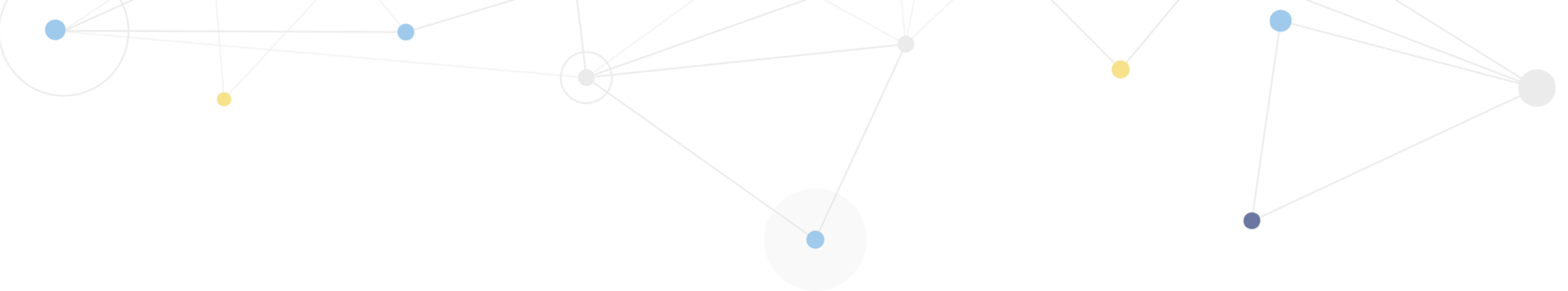
category of vehicle: it may be a new vehicle (NV), a used vehicle (UV) or a demonstration vehicle (DV).

 Lifeline:

the storage cycle that marks the sales cycle of a vehicle; it varies depending on the destination.

 Status:

stage at which a vehicle is located, determined from its position in the stock, detailed below:

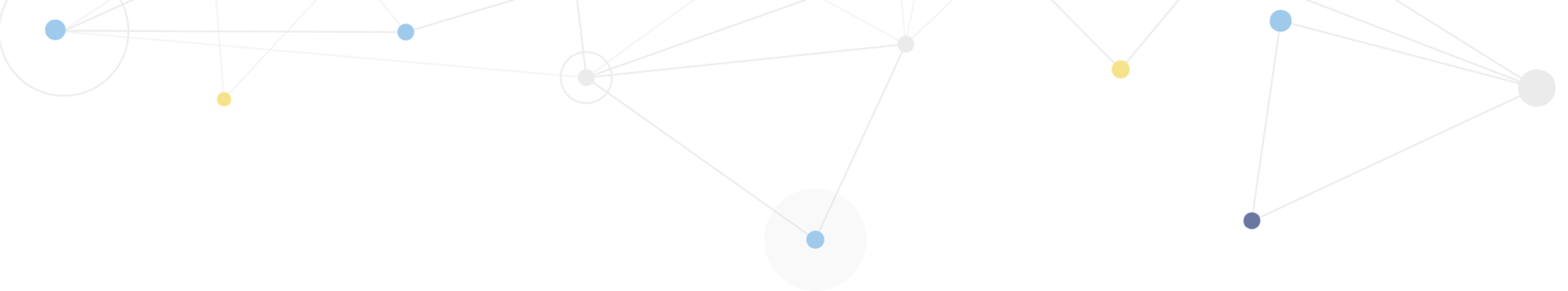


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Stock management

Stock management

- 🌀 Pre-entry: lifeline status assigned to a vehicle awaiting arrival in stock.
- 🌀 Physical entry: active lifeline status when a vehicle physically enters the stock.
- 🌀 Sales stock: lifeline status reached when a vehicle has been analysed to determine its selling price and warranties and is then ready for sale.
- 🌀 Delivery: lifeline status active when an order has been placed and the vehicle is about to be scheduled for delivery from stock.
- 🌀 Exit: lifeline status active when the delivery of a vehicle has taken place, the vehicle has left the stock.
- 🌀 Customised status: step in the sales cycle added by an OpenFlex administrator to complete the lifeline.

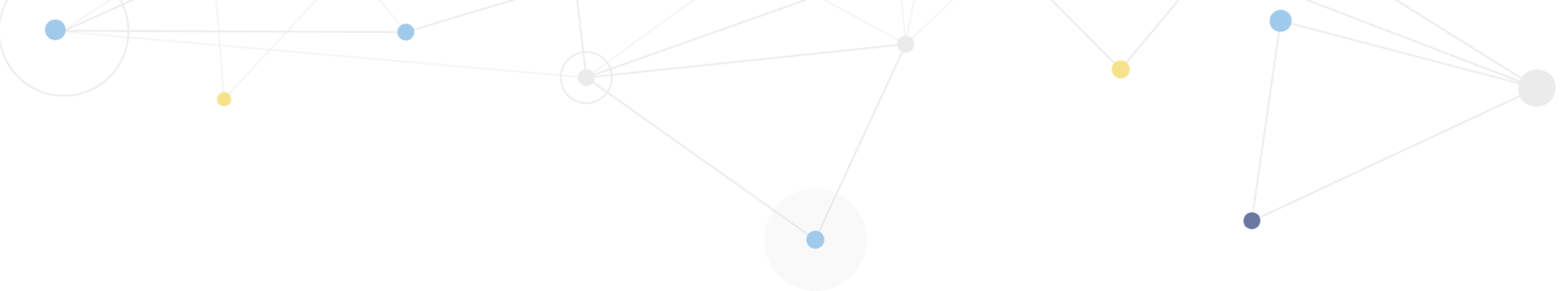


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Publication status

Publication status

- Unable to publish: this status appears when a vehicle file does not meet the criteria set for inclusion on advertisers' websites.
- Awaiting publication: active status when all the criteria defined for inclusion on advertisers' sites have been met and the vehicle is in the process of being included.
- Published: active status when a vehicle appears on the advertisers' websites that you have configured.
- Publication error: status indicating that the publication has gone wrong due to a technical incident.



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Commercial management

Commercial management: opportunity

- 🌀 Opportunity: initiation of a transaction between a salesperson and a prospect; includes offers, orders, trade-ins, test-drives and appointments.
- 🌀 In progress: opportunity status meaning that it is currently being negotiated.
- 🌀 Won: opportunity status meaning that the opportunity has been finalised.
- 🌀 Abandoned: opportunity status which means that the opportunity has been closed because it was unsuccessful.
- 🌀 Neglected: status of an opportunity that has exceeded the set average completion time, and for which alerts are used to warn users.

Commercial management: offer

- Offer: an edited commercial proposal made to a customer.
- In progress: proposed transaction. It may correspond to a purchase by a customer or a trade-in of a used vehicle.
- Validated: status of a transaction in the finalisation phase, the customer has accepted the offer. Validation of the order is required to win the opportunity.
- Cancelled: status of a business proposition that has not been completed, it may have been modified and replaced or deleted.
- Completed: status of a commercial proposition involving a straightforward trade-in of a vehicle without any further purchase. In this context, it will be indicated as having been won once the trade-in has been completed.

Commercial management: order

- ⚡ Awaiting e-signature: status implying that the order has been finalised. The sales representative is waiting for the customer to electronically sign the commercial or administrative documents received by e-mail.
- ⚡ Awaiting validation: this status means that a salesperson has finalised an order with a customer but does not have the necessary permissions to confirm the purchase. They are therefore awaiting approval from their manager.
- ⚡ Refused: status that means the person responsible for the salesperson who placed the order has rejected this transaction for a specific reason.
- ⚡ Ordered: order status meaning that a vehicle has been acquired and the opportunity finalised.
- ⚡ To be delivered: order status which means that a vehicle must be prepared, and its delivery planned.

Commercial management: order

- 🌀 Delivered: order status confirming that a vehicle has been delivered to a customer.
- 🌀 Currently being modified: order status for which you wish to change the terms and conditions by clicking on the "Modify" button.
- 🌀 Pending cancellation: order status corresponding to a tile on the home page. This means that an OpenFlex user has cancelled an order but needs confirmation from a superior.
- 🌀 Cancelled: order status meaning that the order has been cancelled by someone with the appropriate rights.
- 🌀 Replaced: order status which means that an order has been modified using the "Modify" button on the order file, then the order creator has created another order in its place and overwritten the first.

Commercial management: order

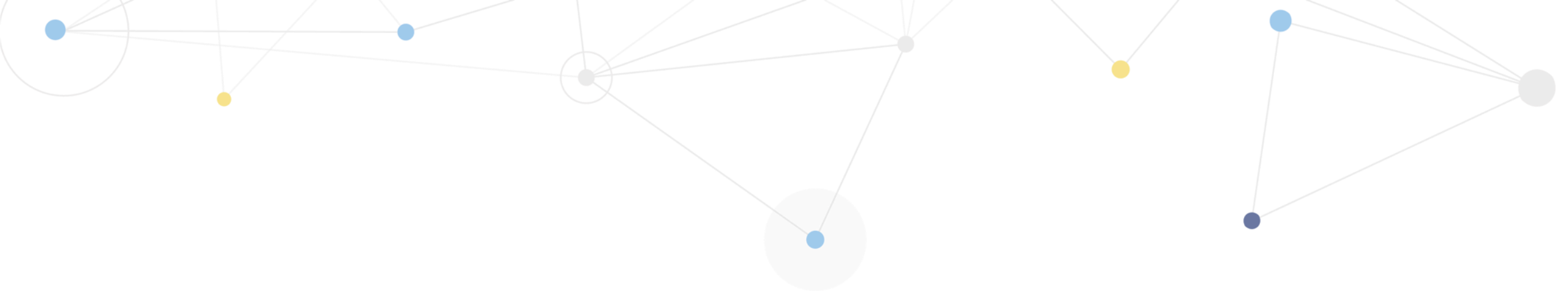
- 🌀 Orders to be validated: orders requiring the intervention of an administrator to approve them.
- 🌀 Validated orders: orders that have been accepted by a manager.
- 🌀 Refused orders: orders that have been rejected by a line manager.

Commercial management: trade-in

- 🔹 To be validated: status corresponding to a situation where a salesperson has made a trade-in and requires the approval of a line manager to proceed.
- 🔹 Auction in progress: status of a trade-in intended for bidders that has yet to be finalised.
- 🔹 Validated: status of a trade-in that has been approved by a sales manager.
- 🔹 Refused: status of a trade-in in which a sales representative has sent a request for approval of a trade-in to a manager, but the manager has refused the transaction.

Commercial management: ownership transfer

- ❏ To be validated: this status is active when the transfer of a vehicle from one point of sale to another requires the approval of a manager.
- ❏ Validated: status attained when the person responsible for approving the transfer has given their approval and the transfer has been completed.
- ❏ Rejected: this status is active if the person responsible for validating transfers has rejected the transfer request.
- ❏ Manual ownership transfer: transfer carried out via the "Vehicles" module. It can be configured in the settings of the same module.
- ❏ Automatic ownership transfer: transfer carried out via the "Opportunities" module. It must therefore be carried out through an offer.

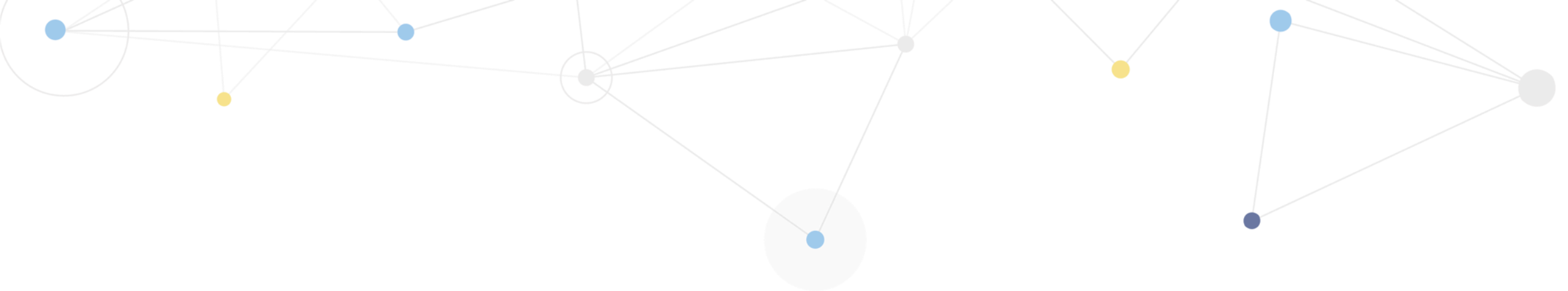


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Home page tiles

Home page tiles

- ❖ Awaiting validation: tile on the home page listing the orders that require a manager's intervention to accept or reject them.
- ❖ Pending cancellation: home page tile listing orders that have been abandoned by salespeople and require confirmation from a superior.
- ❖ To be prepared for delivery: tile on the home page listing all the vehicles whose offer has resulted in an order. At this stage, delivery of the vehicles must be scheduled.
- ❖ To be declared delivered: home page tile listing all vehicles whose delivery has been honoured. Confirmation of vehicle release from stock.
- ❖ To be ordered from factory: tile on the home page listing all the new vehicles that need to be ordered from a manufacturer following a purchase by a customer. To see it, you must have the NV access right.

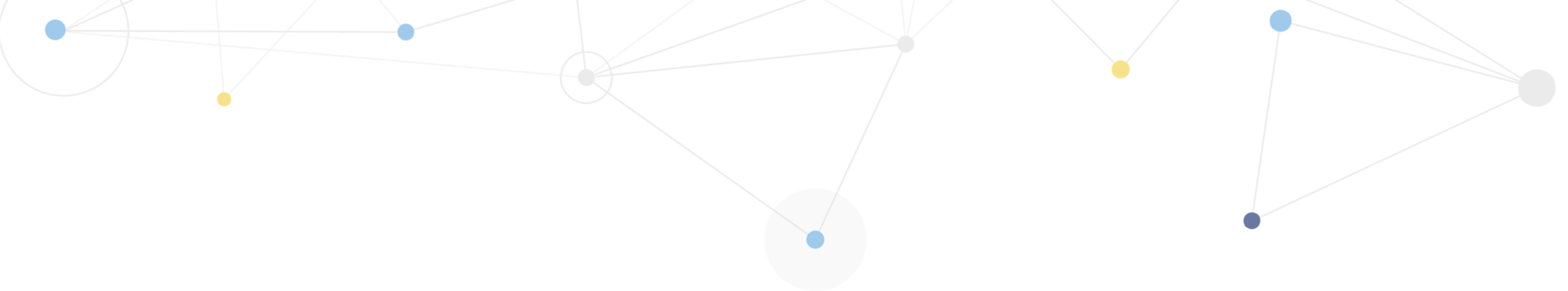


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E-payment status

E-payment

- ❖ To be refunded: e-payment status for secretaries, sales managers and directors. It comes into effect when the e-payment has been approved by a manager, but the linked order has been abandoned.
- ❖ Pending: existing e-payment status for salespeople, directors and sales managers. This status is reached when the payment link has been sent to the customer by email so that they can pay their deposit online.
- ❖ Paid: status confirming that the e-deposit has been paid.
- ❖ Refunded: this status is active when the e-payment has been refunded.
- ❖ Cancelled: this status is active when the customer has decided not to pay the deposit online.
- ❖ Rejected: status informing you that the institution responsible for financing the transaction has rejected the e-payment request.

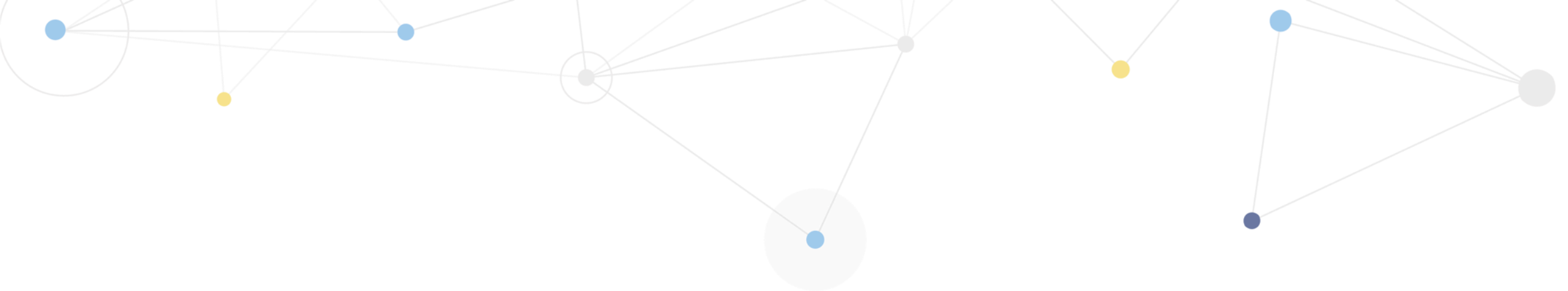


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E-signature status

E-signature

- ❖ Pending: this status is active when the e-signature has been sent to the customer and the customer has yet to sign it.
- ❖ Signed: status confirming that the customer has signed their e-documents.
- ❖ Refused: status indicating that the customer has declined to sign their documents online.
- ❖ Expired: status indicating that the validity period of the e-signature link has been exceeded without the customer having acted in time.
- ❖ Wrong: status indicating that the e-signature link could not be sent due to a technical incident.
- ❖ Deleted: status active when the order linked to the e-signature has been cancelled.

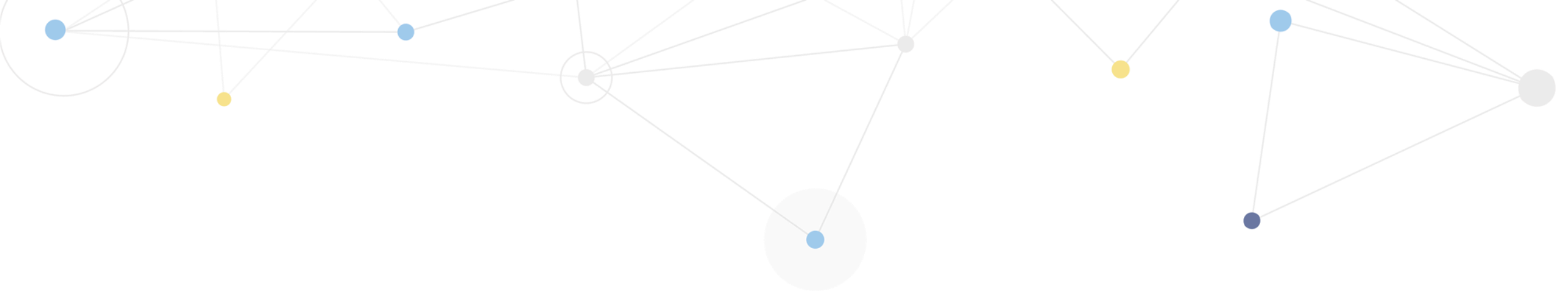


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Stock auction status

Stock auctions

- 📊 In progress: active status when a stock auction has been started. The outcome of the auction is still undetermined.
- 📊 Planned: active status when an auction has been scheduled.
- 📊 Won: status appearing when an auction has been completed and won by a professional.
- 📊 Lost: status active when an auction has been initiated but none of the participants has bid enough to win it.



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Price update status

Price updates

- ❏ To be validated: price update status appearing only for OpenFlex administrators. It is active when the price has been updated either automatically or via a salesperson and requires verification by a manager.
- ❏ Validated: price update status active when a manager has verified and approved a price update made either by the OpenFlex algorithm or by a salesperson.
- ❏ Refused: price update status active when a manager has rejected a price update made either by a salesperson or by the OpenFlex algorithm.
- ❏ Automatic price updates: setting that designates all updates that have been validated by the OpenFlex algorithm without any human verification.

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