Support Admin Tool Operation Manual and How-to Guide

AutoTrader.com

TRADE-IN MARKETPLACE

Dealer Admin Tool Operation Manual and How-to Guide
Welcome!

This is the Dealer Operation Manual for the Trade-In Marketplace Admin Tool. Here you will find detailed information about all of the features and functions to help you manage and process your Instant Trade-In Offers.

The TIM Admin Tool consists of six main sections:

- **Dashboard**
  This is the main workspace to manage offers. Here you will locate, process, and store all Instant Trade-In Offers.

- **Inspection Checklist**
  This valuable tool will assist you during the vehicle inspection process to ensure you have all conditions captured and accounted for in each Instant Trade-In Offer.

- **Quick Quote Tool**
  Located inside the 'Dashboard', this pricing tool allows you to quickly determine the estimated value of any Make and Model that is in excellent condition.

- **Marketing**
  Easy access to effective graphic designs to help you promote the Trade-In Marketplace in your store, on your lot, and on your website.

- **Reporting**
  Detailed data gives you visibility into the performance your Dealership is experiencing with the Trade-In Marketplace. You will see total offer counts broken down by source, a supporting graph chart, and the ability to gauge how well your store is utilizing the TIM tools and processes; plus, a rolling 12 month historical look into your TIM activity.

- **Profile**
  Provides visibility as to how your Trade-In Marketplace account is set-up and allows you the ability to make changes to your preferred contacts inside your Dealership that are handling the TIM process.

These sections and more are accessible via the TIM Homepage.
Homepage

The Homepage is designed to provide easy access for Dealers to all components of the TIM Admin Tool. Four main modules allow Dealers to quickly create and search for Instant Offers, create Quick Quotes and an Inspection Checklist. In addition, there is a module containing various how-to guides and merchandising tools.

1. **Get a New Offer** – Click the “Start Offer” button to begin generating an Instant Offer for walk-ins or for your existing inventory.

2. **Search Existing Offers** – To search for a Consumer’s Instant Offer enter their email address and zip code or last 8 digits of the VIN and click “Search Offers”.

3. **Get a New Quick Quote** – Use this pricing tool to generate an estimated trade-in quote for a Make and Model in excellent condition.

4. **How to Guides** – Click any of these links to view step-by-step guides on various processes within the TIM Admin Tool.

5. **Dealer Insights** – Click this link to view Dealer testimonials and TIM Best Practices as well as FAQs.

6. **Marketing** – These links contain TIM graphics that can be printed and used to promote TIM inside the Dealership.

7. **Get an Inspection Checklist** – Create a pre-populated and personalized inspection checklist to verify conditions of all trade-ins.
The Dashboard

The Dashboard is the main workspace to manage offers. Here you will locate, process, and store all Instant Trade-In Offers. Instant Offers will be categorized into three main tabs – Incoming Offers, In-Progress Offers, and Archive. These tabs allow Dealers to locate and manage Consumer offers based on what stage they are in the process. An offer will automatically be placed into specific tabs based on the current status of the offer.

Quick Quotes and completed Inspection Checklists can also be located on the Dashboard.

1. **Filtering** – Dealers have the ability to sort offers with a variety of criteria using these filters.
2. **Incoming Offers Tab** – where newly generated Consumer offers are found.
3. **In-Progress Offers Tab** – where Consumer offers that are being processed for completion are found.
4. **Archive Tab** – where Consumer offers that have been completed or have expired are found. (90-day achieve only)
5. **Quick Quotes & Inspection Checklists Tab** – can be used in any situation that calls for the need to get a ‘retail ready’ value in seconds.
6. **Vehicle Range Finder Leads Tab** – where Vehicle Range Finder leads are found.
Universal Filtering

Dealers have the ability to sort offers with a variety of criteria using these filters.

Please be advised that filtering will be applied to all four tabs when the “Search” button is clicked. To undo this filtering, simply click on the “Clear Search” button and the offer list will return to the default state.

- **Status**: Sort by current status of each individual offer (refer to Status Definitions on page 7).
- **Vehicle Make**: Sort by the Make of the Consumer’s trade-in vehicle.
- **Replacement Vehicle**: Sort by Make of the vehicle the Consumer wants to purchase.
- **Dealer Rep**: Sort by the Dealer Rep inside the store that is working the offer.
- **Dealership**: Sort by Dealership name (for multi-rooftop Dealers and Dealer groups).
- **Email**: Sort by Consumer email address.
- **Last 8 VIN**: Sort by last 8 digits of the VIN.
- **Date Range**: Sort by a selected date range.
- **Distance to ZIP**: Sort by distance from a specified zip code.
Incoming Offers

Inside the “Incoming Offers” Tab is where newly generated Consumer offers are found. These are the In-Market Shoppers that have been sent to the Dealership and are available to contact. These offers were generated from either the main AutoTrader.com site, the links on the Dealer’s ATC inventory listings or the link on the Dealership’s website.

What can be done in this tab?

It is inside this tab where Dealers will begin actions to process Consumer offers. Viewing, editing offers to add additional conditions, and selecting the “Condition Confirmed” button are done here. An inspection checklist option is available for print on each individual offer.

How long will offers remain in this tab?

There are two scenarios: 1) An offer will instantly be moved over to the “In-Progress” Tab once the “Confirmed Condition” button is selected. 2) If a Dealer does not take any action on an offer, the offer will remain in this tab until the original 72 hour period expires. At that time the offer will automatically be moved to the “Archive” Tab.
Status Definitions

The following defines all of the statuses that can be associated with offers and when they are applicable.

**Pending ATC Review** – The offer requires manual review by AutoTrader.com.*  

**Pending Dealer Review** – A vehicle needs to be inspected by a Dealer before an offer can be given.  

**Eligible** – The vehicle is eligible for an Instant Trade-In Offer.  

**Ineligible** – The vehicle is not eligible for an Instant Trade-In Offer.  

**Modified** – The offer has been changed by your Dealership.  

**Confirmed** – The vehicle’s condition has been confirmed by your Dealership.  

**Grounded** – The vehicle has been grounded by your Dealership.  

**Inventory** – The vehicle has been added to your inventory.  

**Auctioning** – The vehicle is in the process of being scheduled for auction.  

**Expired** – The offer has expired. **  

**At Auction** – The vehicle has been scheduled for liquidation and the auction has confirmed receipt.

*Typically, a manual review is completed within minutes, but please allow until the next business day.  

**You can resubmit the offer, but the offer amount may change from the original offer.
In-Progress Offers

Consumer offers that have been “Condition Confirmed” in the “Incoming Offers” Tab are then moved to the “In-Progress Offers” Tab; this is the second stage of processing offers. Once the Dealer completes a deal and takes possession of a vehicle, it is necessary to then select the “Ground” button.

After the Ground, Keep for Inventory and/or Schedule for Auction buttons become available offers will remain in this tab regardless of action/inaction until the original 72 hour period expires. After that time it will automatically be moved to the “Archive” Tab. To prevent an offer from automatically moving to the “Archive” Tab when it expires, Dealers can opt to ‘Lock’ the offer to keep it in the “In-Progress” Tab.
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**Review confirmed offer** – Click this link to open and review an offer that has already had the “Condition Confirmed” button selected.

**Ground** – Click this button once Consumer deal is complete and Dealer has taken possession of vehicle.

**Keep for Inventory** – Click this button if adding the vehicle to your inventory and to complete the offer process.

**Schedule for Auction** – Click this link to schedule a vehicle for auction when liquidating back to AutoTrader.com.
**Archive**

Consumer offers found here are all expired offers as well as any offers the Dealer force moved by selecting the ‘Move to Archive’ from the previous two tabs.

**How long will offers remain in this tab?**
Offers will remain in this tab for 90 days unless the Dealer chooses to resubmit an expired offer or force moves an offer back by selecting the ‘Move to In-Progress’ link.

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**What can be done in this tab?**
It is inside this tab where Dealers can find all expired offers. These offers can be reviewed or resubmitted and moved back to the ‘In-Progress’ Tab at any time.

Also, Dealers can move any offers that have not yet expired back to the “In-Progress” Tab as well as resubmit offers that have already expired.
Quick Quotes & Inspection Checklists

From the TIM Admin Tool homepage - The Quick Quote tool can be used in any situation that calls for the need to get a ‘retail ready’ value in seconds. The Quick Quote tool utilizes the same algorithm that generates Instant Offers. Year, Make, Model and vehicle options are selected but no conditions are added to the quote. Dealers can manually add conditions once the initial quote has been generated and apply their own values on those conditions to then generate a new quote. Those quotes are stored on this tab.

Dealers also have the ability to utilize the “Inspection Checklist” found on the homepage prior to generating an offer on a Consumer vehicle. The “Inspection Checklist” can be pre-populated with Consumer and vehicle information prior to inspection. These are also stored in this tab.

What can be done in this tab?
Both Quick Quotes and Inspection Checklists can be converted into an Instant Offer from this tab.

How long will quotes and checklists remain in this tab?
Quick Quotes and Inspection Checklists will remain in this tab for 90 days unless they are converted to an Instant Offer. In that case – they would automatically move to the “Incoming Offers” Tab.
**Vehicle Range Finder Leads**

The “Vehicle Range Finder Leads” tab is used to access Vehicle Range Finder (VRF) leads, when they were created/modified and the offer range that was provided to the Consumer.

<table>
<thead>
<tr>
<th>Created/Modified</th>
<th>Offer Range</th>
<th>Dealership</th>
<th>Year/Make/Model</th>
<th>Customer Email</th>
<th>Add/View Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>4/24/2013 3:40 PM</td>
<td>$11.4 - $25,555</td>
<td>“Allegro Toyota”</td>
<td>2014, Hybrid</td>
<td><a href="mailto:info@allegro.com">info@allegro.com</a></td>
<td>Add Notes</td>
</tr>
<tr>
<td>4/24/2013 2:19 PM</td>
<td>$15.011 - $17,710</td>
<td>“Malcolm of Montgomery”</td>
<td>2013, Honda Civic</td>
<td><a href="mailto:info@malcolm.com">info@malcolm.com</a></td>
<td>Add Notes</td>
</tr>
<tr>
<td>4/24/2013 12:18 PM</td>
<td>$4.358 - $5.635</td>
<td>“Malcolm of Montgomery”</td>
<td>2016, Mazda 6</td>
<td><a href="mailto:info@malcolm.com">info@malcolm.com</a></td>
<td>Add Notes</td>
</tr>
<tr>
<td>4/24/2013 12:04 PM</td>
<td>$10.005 - $14,041</td>
<td>“Southland Ford”</td>
<td>2017, Honda Civic</td>
<td><a href="mailto:info@southland.com">info@southland.com</a></td>
<td>Add Notes</td>
</tr>
</tbody>
</table>

**Created/Modified** – Displays the date and time the VRF last created or last modified

**Offer Range** – Displays the Offer Range that was provided to the Consumer on the Dealer’s website

**Dealership** – Displays the Dealership name. The Dealer is only able to see their leads.

**Year/Make/Model** – Displays the Year, Make, Model and Trim of the vehicle.

**Customer Email** – Displays the Consumers contact info including email, name and phone number.

**Add/View Notes** – The only action that can be taken on this tab is to add or view notes related to each lead.
Reporting

Dealers can stay informed on how well their Dealership is performing in all aspects of the TIM program with this comprehensive report. Performance for the current month-to-date are displayed in detail with a complete breakdown of incoming offer counts by source as well as statistics on in-store usage of the various TIM tools.

In addition, a rolling 12 month performance report is included to allow Dealers to identify trends and measure growth over a period of time.

What can be done in this report?

This report can be exported to excel and can be printed.

Dealer Groups have the ability to review all Dealerships in their group as a whole or select individual stores via dropdown.
Dealers can stay informed on how well their Dealership is performing in all aspects of the TIM program with this comprehensive report. Performance for the current month-to-date are displayed in detail with a complete breakdown of incoming offer counts by source as well as statistics on in-store usage of the various TIM tools.

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- **ATC Site** – Represents the TIM ‘house ads’ placed throughout the main AutoTrader.com website and are not dedicated to any Dealerships.
- **Kelley Blue Book Site** – Represents the TIM ‘house ads’ placed throughout the main kbb.com website and are not dedicated to any Dealerships.
- **Customer Requests** – Customers who chose to send their information to a specific TIM Dealer.
- **Dealer’s Website** – Represents the TIM logo and link that have been placed on the Dealership’s website.

**External Traffic Graph** – Visual display of external offer traffic by source.

**Internal Usage** – This section of the report displays count totals for all offer and Quick Quotes that were generated from inside the Dealership.

**Sources:**
- **Dealer Offers** – Represents all offers run inside the Dealership from the homepage of the TIM Admin Tool.
Reporting (cont.)

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In addition, a rolling 12 month performance report is included to allow Dealers to identify trends and measure growth over a period of time.

- **Quick Quotes** — Represents all quotes run inside the Dealership using the Quick Quote tool inside the TIM Admin Tool.
- **Kiosks** — Represents all offers generated from a TIM kiosk inside the Dealership.
- **Rolling 12 month Activity Report** — For both Internal and External—broken down by source.
- **Vehicle Range Finder Leads** — Provides the number of VRF leads and number of leads that were converted to offers, if applicable.
Marketing

A key component in maximizing opportunities with the Trade-In Marketplace is in-store and Dealer website promotion. In this section of the TIM Admin Tool many promotional items can be found to assist in letting the public know that they have an Instant Offer waiting for them at the Dealership.

How to get a TIM logo link on Your Website:

**Step 1:** Confirm Trade-In Marketplace is selected

**Step 2:** Choose where you would like to add TIM access

**Step 3:** Choose how TIM should be accessed by the Consumer on your website

**Option 1:** TIM opens in a new window. When a Consumer has completed their offer – they will close the pop-up window and return to the Dealership website. **This is the recommended solution.**

**Option 2:** TIM is placed into an iFrame solution where the TIM valuation tool will appear within the pages of the Dealership’s website.

**Step 4:** Choose which TIM messaging, to appear on the first page of the TIM tool, is preferred.

If you are interested in taking in vehicles whether the Consumer is buying a car from you or not – select the option ‘Trade-Ins or Cash’. If you are only interested in dealing with trade-ins – select the option ‘Trade-ins Only’.

**Step 5:** Choose the TIM artwork that will best fit in the designated location on your website.

**Step 6:** View and test your selection option.

**Step 7:** The code needed to implement the logo link and activate TIM on the Dealership website is automatically created at the bottom of the page. Have the Dealership’s website administrator paste...
Vehicle Range Finder (VRF) is offered as a value-add to Dealers with Vehicle Valuator Plus, Buying Center and Trade-In Center packages. VRF lives on a Dealer’s website and helps drive consumer online traffic to the showroom.

How to get Vehicle Range Finder on Your Website:

**Step 1:** Select Vehicle Range Finder

**Step 2:** Select Vehicle Range Finder

**Step 3:** Select the version of VRF for the Dealership’s website. Color options include light or dark. There is also the option to provide Consumers with the ability to go further down the TIM funnel. The image that appears on this page is an actual size example.

**Note:** Standalone customers are limited to color selection.

**Step 4:** The code needed to implement and activate VRF on the Dealership website is automatically created at the bottom of the page. Have the Dealership’s website administrator paste this code into your website.

Please note that if the Dealer decides to use an Entry Point graphic, its code will need to be edited. The code will need to include the link for the page where the VRF is placed in the Dealer’s website.
Profile

This page allows a Dealer to review how their Trade-In Marketplace account has been setup. Details such as Dealership contact information, TIM product package, Dealership personnel contact information and alerts setup, as well as inventory preferences can be seen.

What information can a Dealer adjust in the profile?
Dealers can add up to 10 Dealership personnel to the profile complete with their contact information. These can be edited by the Dealer at any time. Any contacts in this section of the profile can be setup to receive text message offer alerts. These contacts will also serve as a point of contacts for any vehicle valuation questions should the need arise.

If a change is needed on any other information contained in the profile, please contact your AutoTrader.com Account Consultant.
Vehicle Range Finder - Standalone Customers

Customers who only have the Vehicle Range Finder product have a limited view of the Dashboard tab in the Dealer Admin Tool. The Dashboard tab is the landing page for standalone VRF customers.

**Dashboard** - This serves as the landing page for standalone VRF Customers. They only have access to the Vehicle Range Finder tab.

**Reporting** - The reporting is limited to VRF lead count and historical activity.

**Marketing** - Access is limited to downloading Vehicle Range Finder and entry point assets.
How to Process a Consumer’s Offer—Step-by-Step Guide

1. When a Customer arrives at your Dealership with the Offer letter, Go to: https://tradein.autotrader.com/dealers then click “Login”.

2. From the Admin Tool Homepage - Enter the Customer’s e-mail address and Zip code then click “Search”.

3. The offer will pull up in the ‘Incoming Offers’ tab. Click the “Print the Inspection Checklist” link.

4. Use printout to inspect the vehicle with the Customer. Upon completing inspection, return to computer to edit the offer if necessary.

5. Click the ‘Edit Offer or Confirm Condition’ link.

6. Enter the VIN and Click “Verify VIN” in order to open ‘Edit’ links or to ‘Confirm Condition’.
How to Process a Consumer’s Offer—Step-by-Step Guide

If no additional edits are needed – proceed to Step 10.
To edit – click the ‘Edit Section’ link within the condition category that you need to change (Exterior/Interior/etc.).

Scroll down to bottom of Review Page then click the “Condition Confirmed” button to confirm the condition of the vehicle.

Scroll down on the Review Page again and click the “Ground” button to confirm the vehicle is in the Dealership’s possession.
Or find the offer under the ‘In-Progress’ tab and click the “Ground” button there.

Once edits are complete, click the ‘Get Trade-In Offer’ button at bottom of page.

Once grounded – the Dealer has 72 hours to choose one of the following:
- **Keep for Inventory** button—retains the vehicle in the Dealership’s inventory.
- **Schedule for Auction** button—to liquidate the vehicle back to auction.
How to Generate a Quick Quote—Step-by-Step Guide

1. When in need of a quick trade-in quote or the value of a Dealer-owned vehicle, Go to: https://tradein.autotrader.com/dealers then LOGIN

2. From the Admin Tool homepage – enter either the VIN or select the Year, Make, Model of the vehicle and click Start Quote.

3. Select name of Dealership rep from dropdown and enter a phone number. If quote is for a Consumer vehicle – select ‘yes’ and enter Consumer contact information. For a Dealer owned vehicle – select ‘no’ and cont. to step 4.

4. Select the Style (or trim level), exterior and interior color, and enter mileage. Then click Next.

5. Select the Options and/or equipment that is found on the vehicle. For proper valuation – ensure that this information is accurate. Then click Get Quick Quote.

6. The Quick Quote is returned within seconds. Dealer may enter in vehicle conditions and apply values to obtain a new quote. Click Add Dealer Adjustment.
How to Generate a Quick Quote—Step-by-Step Guide

7. Enter description of the condition in the 'Dealer Adjustment Description' box. Then enter a dollar value and select 'Subtract'. Then click on Update Quick Quote.

8. The adjusted Quick Quote will now be displayed along with an itemized list of conditions and their values. Additional conditions can be added.

9. If using the Quick Quote with a Consumer – a printed version can be made for Dealership to present.