

PRODUCT FEATURE OVERVIEW

Complete Feature Overview

A used- and new-car dealership sales platform: pipeline CRM, contract e-signing, CitNow video, AI automation, customer insights and a PMA deals map — in one mobile-first app.

A complete dealership sales platform

Sales Pipeline · Contract e-Signing · CitNow Video · AI Automation · Customer Insights · PMA Deals Map

1 What it is, in one paragraph

DealerAutol is a purpose-built dealership sales system that runs the entire customer journey — from the moment an enquiry lands to the day the car is delivered and the review request goes out. It combines a full sales-pipeline CRM, DocuSign-style contract e-signing with open/sign tracking, CitNow video linking, and automatic SalesLog deal entry. It is mobile-first (installs on a phone like an app), works across the whole team with role-based access, and uses AI to turn screenshots, PDFs and forwarded emails into structured leads automatically — and to read the signed contract for the customer's date of birth, postcode and deal date, powering birthday nudges and a postcode "deals map" of your market area. It is cloud-hosted and runs 24/7.

2 Sales Pipeline & Lead Management

The heart of the product: a visual pipeline every salesperson and manager works from.

■ The pipeline

- **12 defined stages**, in order: New Enquiry → Contacted → Tried Contacting → Appointment Booked → Test Driven → Negotiating → Deal Done → Deal Done (Finance Pending) → Deal Done (Finance Approved) → Booked In → Delivered, plus **Lost**.
- **Kanban board on desktop** (all stages side-by-side, drag-and-drop between columns) and a **single-stage swipe view on mobile** (tap the stage pills to move across the pipeline).
- **Filter tabs**: Active / All / Lost.
- **Instant search** — a header search finds any customer by name, phone or stock number across every stage in seconds.
- **Urgency-sorted columns** — overdue follow-ups, then today's follow-ups and appointments, automatically float to the top of each stage, so the cards that need action are the first thing a rep sees.
- Every card shows the customer, the car, stock number, source, assigned salesperson, phone, last-contacted time, and the next appointment or pickup date at a glance.

■ Rich lead records

Each customer record captures:

- Contact details (name, phone, email, date of birth).
- The car of interest — either a **stock number** (which auto-pulls the live vehicle) or a **free-text make/model/colour** when there's no specific car yet.
- **Trade-in details** — make, model, year, rego, odometer, colour, valuation, payout figure and notes.
- Finance and aftermarket notes, deal number, source, and general notes.
- A full **contact-log history** with timestamps (calls, texts, notes), including the ability to **back-date** an entry for a contact that happened earlier.

Stage discipline (prompts that enforce good process)

Moving a customer forward prompts the salesperson for what that stage needs — e.g. a **contact note** when marking Contacted, a **date** for Appointment or Test Driven, a **pickup date** for Booked In, and the full deal pack (deal number, finance, aftermarket, signed contract) for Deal Done. The process guides reps to keep records complete rather than relying on memory.

Card badges (instant visual signals)

Cards surface status at a glance with badges: **follow-up due/overdue**, **Lost pending**, **Awaiting approval** (duplicate), **trade-in**, **price drop (with the \$ amount)**, **car may be sold**, **review request sent (★)**, **delivery checklist progress (e.g. ✓ 6/9)**, and a **CitNow video camera icon** (tap to watch).

3 Duplicate-Client Protection & Approval Controls

A standout control that stops two salespeople quietly working the same customer and protects gross.

Duplicate detection & blocking

- On **every new lead**, the system checks the phone and email against all active customers. Phone numbers are normalised (so `0400...` and `+61 400...` match), and email is matched case-insensitively.
- Same salesperson** adding the same customer again → allowed (they may be working a second car).
- Different salesperson, same department** → the new lead is **held in an "Awaiting Approval" state and frozen** — it cannot advance through the pipeline. The original salesperson **and** the department manager are notified and must **approve or deny**. Deny deletes the duplicate; approve releases it.
- Different department/brand** → allowed, but the original salesperson is notified that the customer is also being worked elsewhere.
- A live **duplicate check** also runs as the lead is being entered, warning before the record is even saved.

"Lost" approval gate

- A salesperson **cannot unilaterally mark a deal Lost**. They must enter a reason, which sends a **Lost-pending approval** to the manager. The manager approves or denies (with an optional note back to the rep). Managers themselves can mark Lost immediately.
- This gives managers a real save-the-deal checkpoint and clean lost-reason reporting.

4 Reminders & Follow-Up Discipline

The system chases the salesperson so no customer goes cold.

- Appointment reminders** — fire the **day before** (from the morning) **and ~1 hour before** a timed appointment.
- Delivery/pickup reminders** — same day-before and hour-before cadence.

- **Follow-up reminders** — fire exactly **when the follow-up is due**, and can carry a note of what the follow-up is about ("check finance", "call after service", etc.).
- Reminders are **idempotent** — each one fires once and is safely tracked, so edits or timezone changes never double-send.
- On opening the app, the salesperson gets a **count of everything overdue or due today**.
- A dedicated **Reminders view** lists all overdue and today's actions (follow-ups, appointments, needs-contact, price drops) with one-tap access to the customer. Individual reminders can be **dismissed**, or a follow-up **snoozed in one tap** (+1 day / +3 days / +1 week) without opening the card.
- All timing runs on **dealership local time** (with automatic daylight-savings handling).

5 Notifications — Push & In-App

- **Web push notifications** to the salesperson's phone/desktop (installed app), even when the app is closed — tapping one opens straight to the relevant customer.
- **In-app notification centre** with an unread bell badge. Two kinds:
 - **Info** notifications (clear on read).
 - **Action** notifications that **stay until resolved** — with inline **Approve / Deny** buttons for things like Lost approvals and duplicate approvals.
- Events that notify: contract **opened**, contract **signed**, new **message** on a customer, **lead assigned** to you, **Lost/duplicate approvals** and their outcomes, and **new email leads** to assign.
- Managers and reps can **message each other on a specific customer** (a per-customer thread), with a notification on each new message.

6 Contract e-Signing (with open & sign tracking)

A complete, legally-grounded electronic signing workflow built in — no third-party DocuSign subscription needed.

Prepare & send

- **Upload a contract PDF** to a customer.
- A **DocuSign-style field editor**: the salesperson drops **signature, full-name, date and text fields** anywhere on any page of the PDF, dragging and resizing them into place.
- Save as a **draft**, or **send to sign** — which generates a unique, unguessable signing link (no customer login or account required).
- The link can be emailed to the customer via a **pre-drafted email** that opens in the rep's mail app ready to send.

📌 The customer's experience

- The customer opens the link on their phone or computer and reads the **full document** rendered page by page.
- They **sign by drawing** on screen or **typing** their name in a signature font, fill any other fields, tick an **explicit consent box**, type their name, and press Sign.

📌 Open & sign notifications (the part you asked about)

- The moment the customer **first opens** the signing link, the salesperson gets a **"Contract opened 🗉"** notification (push + in-app), stamped with the exact time.
- The moment the customer **signs**, the salesperson gets a **"Contract signed 🖋️"** notification naming the signer.
- The rep sees, per contract, whether it's **Draft / Sent / Opened / Signed**, with the signer's name and signed time.

📌 The signed document & audit trail

- The signatures are **burned onto the original PDF**, and a **signature certificate page** is appended capturing the **signer's name, date/time, IP address, device, terms version, and a SHA-256 integrity hash** of the exact document and fields agreed to.
- The document is **locked once signed** (a set-once, tamper-evident record — re-opening the link can't overwrite it).
- The finished, audit-stamped PDF is **emailed to the customer and finance** automatically and is downloadable any time.
- The certificate cites the **Electronic Transactions Act** compliance basis, so the signature stands up as a valid electronic signature.
- Uploaded contracts can be **viewed at any point — even before signing** — from the customer card.

7 Deal Completion & Handover

📌 Deal-done pack

- Moving a customer to **Deal Done** opens a structured box requiring the deal number, finance info, aftermarket info and the signed contract.
- It generates a **deal-done email to your Business Manager and aftermarket team** (recipient lists configured per department), with all the customer/vehicle/price/deal detail and the **signed contract attached** — opened as an editable Outlook draft so the rep can add anything before sending.
- On the first deal-done, the deal is **automatically pushed to SalesLog** (see Integrations).

📌 Reads the signed contract for you

- When the deal-done contract is uploaded, AI reads it in the background and captures the **customer's date of birth, postcode, and the deal date printed on the contract** — no re-keying.

- The **contract's deal date is authoritative**: a deal signed one day but entered the next still reports on the real date, so the dashboard's deal figures land in the right period.
- A one-tap "**contract data test**" lets a manager verify what the AI reads against real documents before trusting it, and a **back-fill** populates these fields across historical deals in one click.

📅 Birthday & repeat-business nudges

- Because DOB is captured from the contract, the app surfaces **customers whose birthday is coming up** — a 🎂 badge on the card and a "**Birthdays this week**" dashboard tile — so reps can reach out and keep the relationship warm for the next purchase or referral.

📅 Delivery booking

- Booking a delivery generates a downloadable **Outlook calendar invite (.ics)** with the delivery date/time, customer, year/make/model, stock number, deal number and salesperson in the subject line, plus finance/aftermarket/notes and the **contract attached**. The rep opens it and hits Send, so it lands cleanly in recipients' calendars.
- A **pre-delivery checklist** (contract signed, finance settled, rego transferred, plates, detailing, fuel, second key & manuals, accessories, handover booked) is tracked per customer, with progress shown on the board card.

📅 Post-delivery reviews

- One tap sends a **Google review request** that opens in the salesperson's own phone messaging app, pre-filled with a friendly message and the **correct review link for that location** (e.g. a Kia customer gets the Frankston Kia review link). The system tracks how many requests were sent and when.

8 Manager Tools & Team Oversight

- **Assign & reassign leads** to salespeople — the lead lands on that rep's pipeline and they're notified. (Managers can only assign within their departments; superusers to anyone.)
- **Managers can view and edit their whole team's customer cards**, add manager notes (which are tagged and coloured differently from rep notes), and move stages — while a salesperson can only edit their own.
- **Approval queues** for Lost and duplicate decisions land in the manager's notification centre with one-tap approve/deny.
- **Per-department configuration** (see below) so each brand/department runs with its own emails and review locations.
- **Multi-department support** — a salesperson can belong to more than one department (e.g. Kia + Hyundai); managers see only their departments' activity.

9 Dashboard & Analytics

A live command centre, with **one date-range control** governing the whole analytics view.

| Date range

- Presets: **Today** · **This week** · **Last week** · **This month** · **Last month** · **All**, plus **custom from/to calendar pickers** for any two dates.
- Changing it re-scopes **every** analytics panel together, so a GM can look at "last week" or "last month" or any window instantly.

| What it shows

- **Snapshot cards**: active leads, deals in progress, follow-ups due, appointments today (each taps through to the underlying list).
- **Performance**: new leads, deals done, **win rate**, and **average speed-to-first-response** for the period.
- **Team table** (managers): per-salesperson active / deals / new / today's activity, each cell drillable to the exact customers.
- **Lead sources** with **conversion %** per source, **Lost reasons** breakdown, **pipeline stage** bars, a **conversion funnel** (Leads → Appointment → Test drive → Deal), and a **6-week trend chart** of leads vs deals.
- **CitNow videos per salesperson** for the chosen range (see below).
- **Where deals come from** — a ranked breakdown of sold customers by postcode, plus an interactive **deals map** that plots each area with bubbles sized by deal count, so you can see how deals cluster inside your **Primary Market Area (PMA)** and where the gaps are.
- **Action lists**: Awaiting first contact (untouched leads), Aged leads (active 14+ days and quiet 7+), **Birthdays this week**, Price-drop callbacks, Cars maybe sold, Deliveries this week, Review requests due, Trade-in pipeline (with total trade valuation).
- **Everything drills down** — tap any number, stage, rep or source to see the exact customers behind it, and closing a customer returns you to that list.

| Calendar view

- A month calendar of **appointments (blue)**, **pickups (green)** and **follow-ups (amber)**; tap a day to see everything on it and jump to the customer.

10 CitNow Video Integration

- **Automatic sync** of your dealership's CitNow videos.
- **Auto-links a video to the right customer by the phone number it was sent to** — no manual matching. (Email is a fallback key.)
- A **camera icon appears on the customer's card**; tap to watch.
- A **manual picker** searches your **entire video back-catalogue** (thousands of videos) by **phone number, customer name or vehicle** when you want to attach one yourself.
- A **dashboard panel counts videos per salesperson** over the chosen date range — so a GM can see exactly who is (and isn't) sending walk-around videos this week, last week, or any period. **Tap a salesperson to see their actual videos** and open any of them.

11 AI-Powered Automation

Every way a lead can arrive is turned into a clean, structured record automatically.

- **Screenshot → lead:** snap a screenshot of an enquiry (e.g. a marketplace prospect) and AI reads the customer name, phone, email, vehicle, stock number and price into a new lead.
- **Contract PDF → deal:** upload a signed contract and AI reads the customer and deal details, creating a **Deal Done** record pre-filled and ready to send.
- **Forwarded email → lead:** forward a customer email to a department address (e.g. `kia@yourdealer.com`) and AI parses it into a new enquiry, routed to the department manager to assign. (Inbound email is wired end-to-end.)
- **AI-drafted follow-up messages:** generates a warm, natural, ready-to-send follow-up text using the customer's history, car, and how long it's been — no blank-page typing.
- **Contract → customer intelligence:** at deal-done, the signed contract is read to capture the customer's **date of birth, postcode and deal date** automatically — powering birthday nudges, the postcode deals map, and accurate deal dating (with a manager dry-run test + historical back-fill).

12 Inventory & Market Intelligence

- **Live website inventory** scraped automatically (new, demo and used), including price, odometer, photos, VIN, colour and how long each car has been listed.
- **Sold detection** — a car that drops off the website overnight is detected as sold; the system tracks each on-lot period ("stint") so cars that leave and come back are handled correctly, and **age never resets** incorrectly.
- **Aged stock** — 60- and 90-day buckets with true calculated days-in-stock.
- **Price-drop intelligence** — captures the advertised price when a customer enquired and flags when that car later drops in price, so reps can make a timely callback (surfaced on the card **and** the dashboard).

13 SalesLog Integration

- **SalesLog auto-entry** — when a deal is marked done, it's **automatically added to SalesLog** on the correct department's account, with the customer, vehicle, deal number, salesperson and price filled in. A ledger prevents a cancelled deal from being silently re-added after staff delete it, so manual clean-ups stick.

14 Roles, Security & Access Control

- **Roles:** Superuser (full access), Manager (department-scoped team oversight) and Salesperson (their own pipeline).

- **Department scoping** throughout — managers and reps only see what belongs to their department(s).
- **User onboarding**: superusers create users with a role; new users get a **one-time setup link by email** to set their own password; **forgot-password** self-service reset is built in.
- **Security**: login-required access, **encrypted storage of sensitive credentials** (e.g. SalesLog logins), optional **IP allow-listing**, and unguessable tokens for public signing links.

15 Platform, Mobile App & Reliability

- **Installs like a native app** on iOS and Android home screens (Progressive Web App) and runs on desktop — one codebase, no app-store friction.
- **Cloud-hosted, running 24/7**, with data stored on a persistent cloud volume.
- **Auto-saving customer cards** (edits persist as you type) and **cross-device sync** — the board refreshes when you return to the app and on a gentle background poll, so the whole team sees the same live picture.
- **Fast, clean, mobile-first design** with clear loading states, tap feedback, and safe-area support for modern phones.
- **Push notifications** across devices, with a service worker that keeps the app responsive.
- Built to **scale to multiple departments/brands** and even run as a standalone product on its own domain and branding.

16 Why it matters (the short version for a GM)

- **Nothing slips**: reminders, approval gates and duplicate-blocking enforce the process your best salespeople already follow — automatically, for everyone.
- **More gross protected**: duplicate control and the Lost-approval gate keep managers in the loop before a deal walks.
- **Faster, cleaner deals**: in-app e-signing with open/sign alerts, auto deal-done emails, delivery invites and SalesLog entry cut the admin at the back end.
- **Real visibility**: one date range drives a full analytics picture — who's performing, where leads come from, why deals are lost, and who's sending videos.
- **Repeat business & local marketing**: birthday nudges (from the contract) keep customers warm for the next sale and referral, and the postcode **deals map** shows exactly where your business is coming from — and where it isn't — inside your PMA.
- **Runs on the tools you already have**: your website, SalesLog and CitNow — stitched together and automated.

Prepared as a functional overview of DealerAutol. Every capability listed is implemented in the product.