

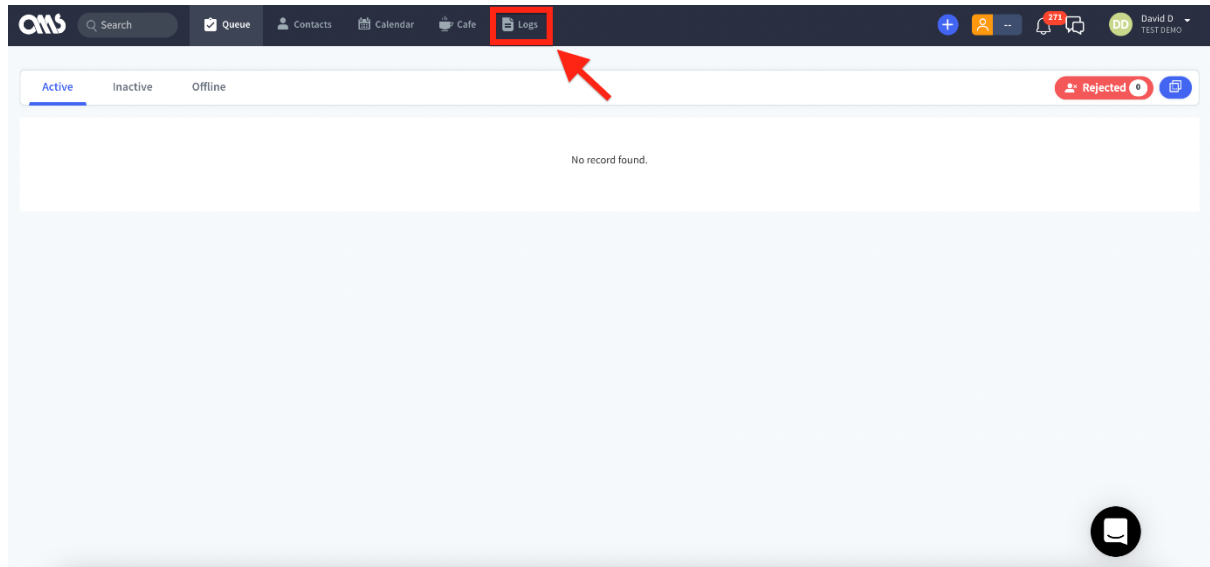
AMS Guide

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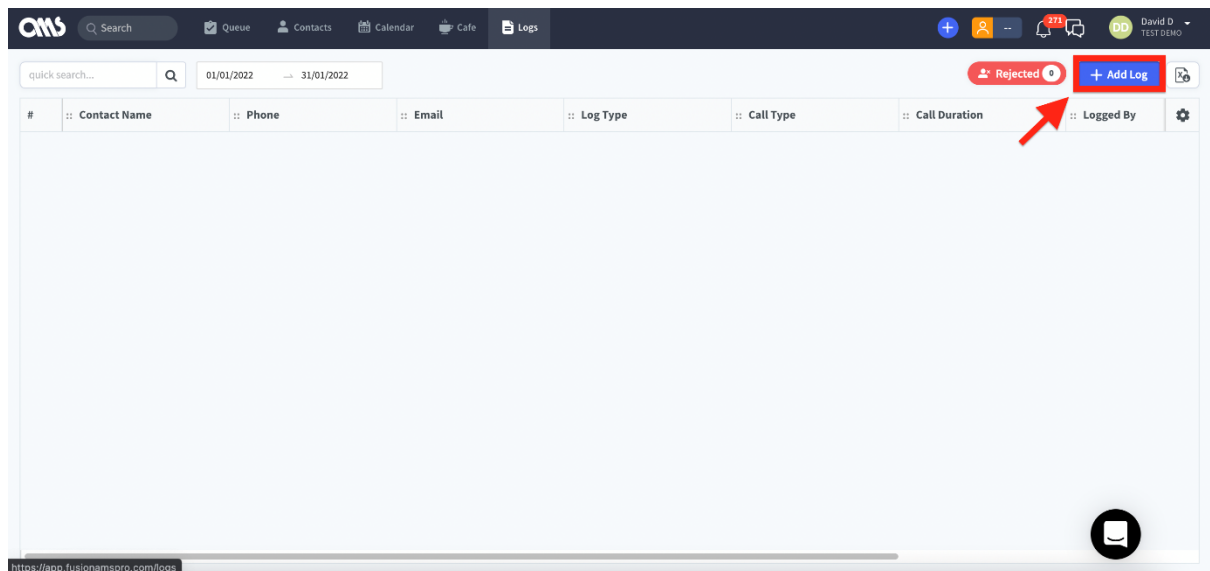
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Front Desk

1. Click on the **Logs** tab in the menu bar located in the top of the screen.



2. Click on the blue **Add Log** icon in the top right hand corner of the screen.



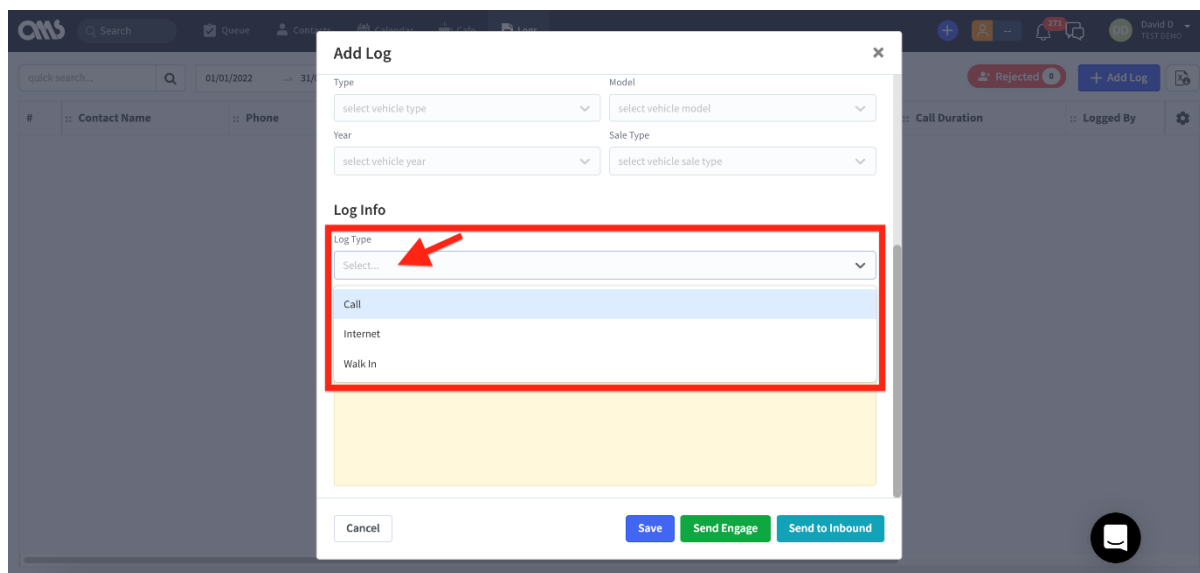
3. A dialogue box will appear. Here you can search for an existing contact, or add the contact information in manually.

The screenshot shows the 'Add Log' dialog box in a CRM system. The 'Contact Info' section is highlighted with a red box and a red arrow pointing to the 'search contact' input field. The dialog includes fields for First Name, Last Name, Phone, and Email, as well as a 'Link Enquiry' field and 'Vehicle Info' dropdowns.

4. **(Optional)** You can click on the **Link Enquiry** field, and then select the enquiry to link to this customer. If this is a new enquiry please proceed to step 5.

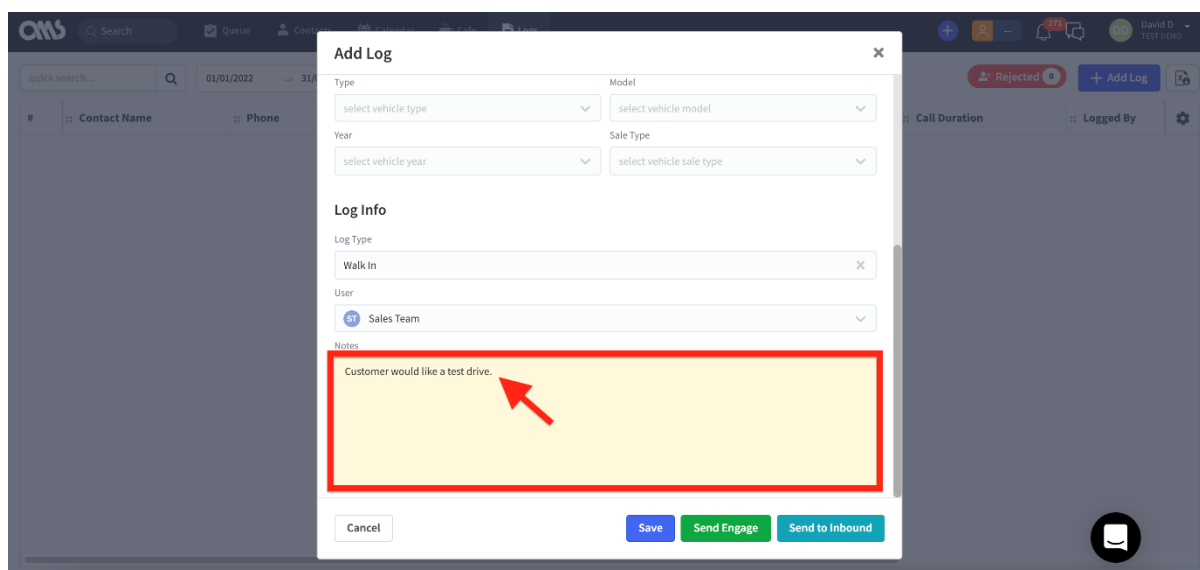
The screenshot shows the 'Add Log' dialog box in a CRM system. The 'Link Enquiry' field is highlighted with a red box and a red arrow pointing to the 'select enquiry' input field. The 'Contact Info' section now displays 'Mr John Doe' with contact details. The dialog includes fields for Vehicle Info and Log Info.

5. Now click on **Log Type** in the drop-down menu and select whether the enquiry type.



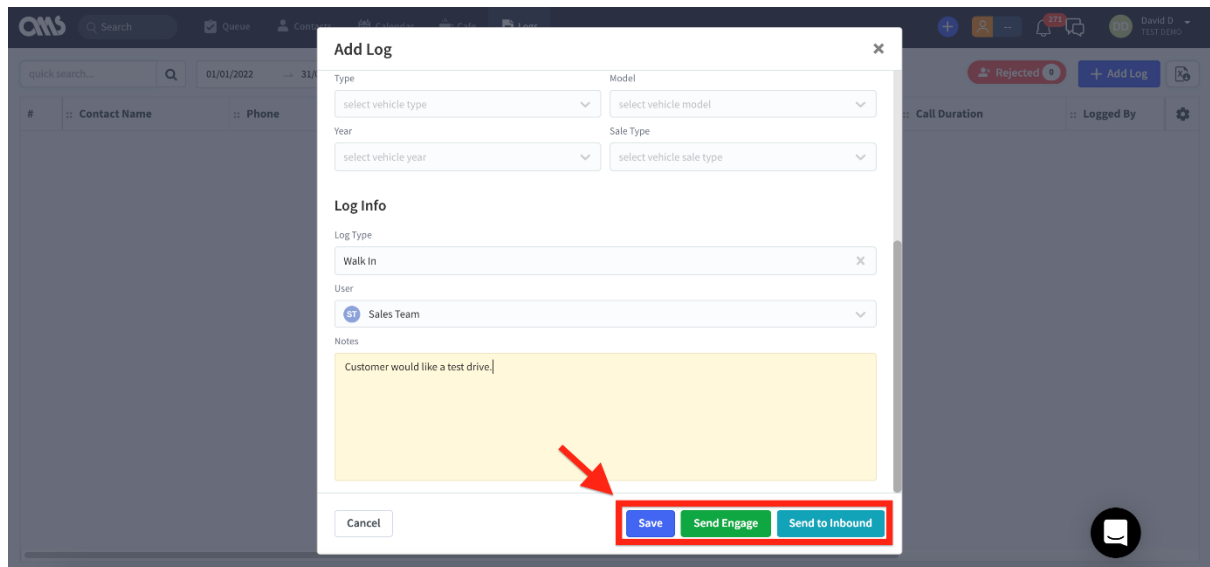
The screenshot shows the 'Add Log' form in a CRM system. The form has several dropdown menus for 'Type', 'Model', 'Year', and 'Sale Type'. Below these is the 'Log Info' section, which contains a 'Log Type' dropdown menu. This dropdown menu is highlighted with a red box, and a red arrow points to it. The dropdown menu is open, showing options: 'Select...', 'Call', 'Internet', and 'Walk In'. Below the dropdown menu is a yellow notes box. At the bottom of the form are buttons for 'Cancel', 'Save', 'Send Engage', and 'Send to Inbound'.

6. Now you will need to type into the yellow notes box something about this enquiry e.g. A couple wearing red has just walked into the dealership.



The screenshot shows the 'Add Log' form in a CRM system. The 'Log Type' dropdown menu is now set to 'Walk In'. Below the 'Log Type' dropdown menu is a 'User' dropdown menu set to 'Sales Team'. Below the 'User' dropdown menu is a yellow notes box. This notes box is highlighted with a red box, and a red arrow points to it. The notes box contains the text: 'Customer would like a test drive.' At the bottom of the form are buttons for 'Cancel', 'Save', 'Send Engage', and 'Send to Inbound'.

7. If you selected "Link Enquiry" in step 4 then you will only see the **Save** icon. Otherwise you can **Send Engage** (to send directly to the sales executive), or **Send to Inbound** (which will send to the sales manager).



8. Congratulations, you have just added a walk-in enquiry. You will now be taken back to this screen and you will be able to see your log in the list below.

quick search...

01/01/2022 -> 31/01/2022

Rejected

+ Add Log



#	Contact Name	Phone	Email	Log Type	Call Type	Call Duration	Logged By	
1	John Doe (John)	+61 040 000 0000	john.doe0021@hotmail.com	Walk In			David D 11/01/2022 12:55 PM	

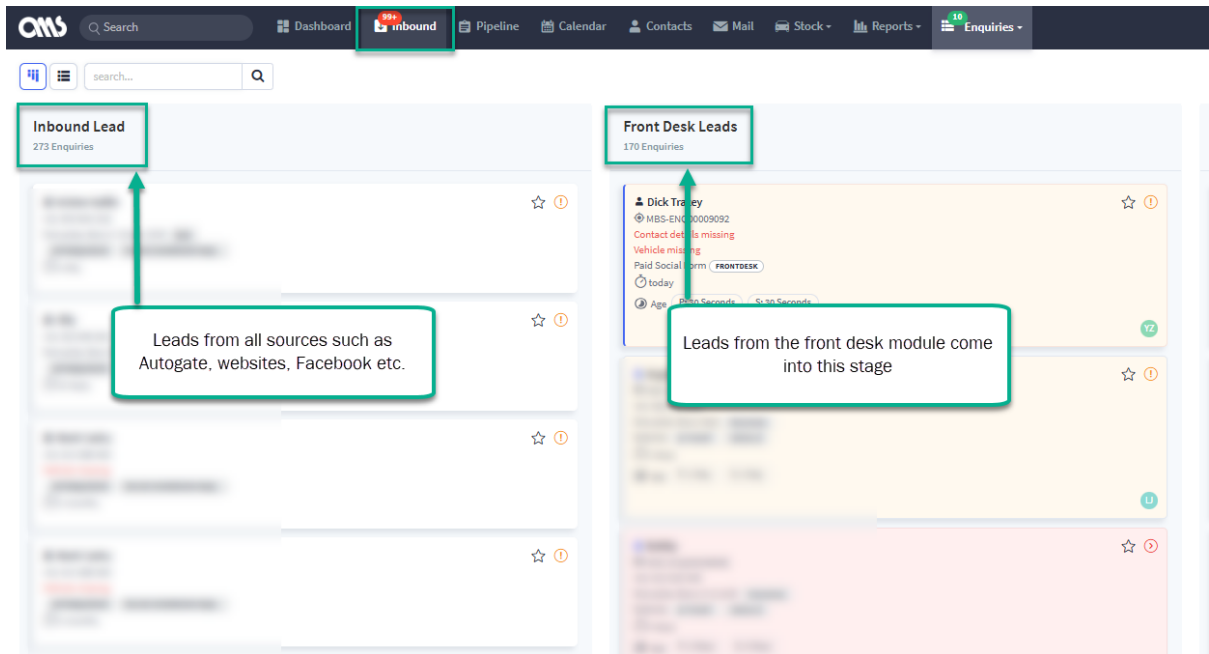


Inbound & Pipelines

These 2 sections are where we do all our interactions with the system

Inbound

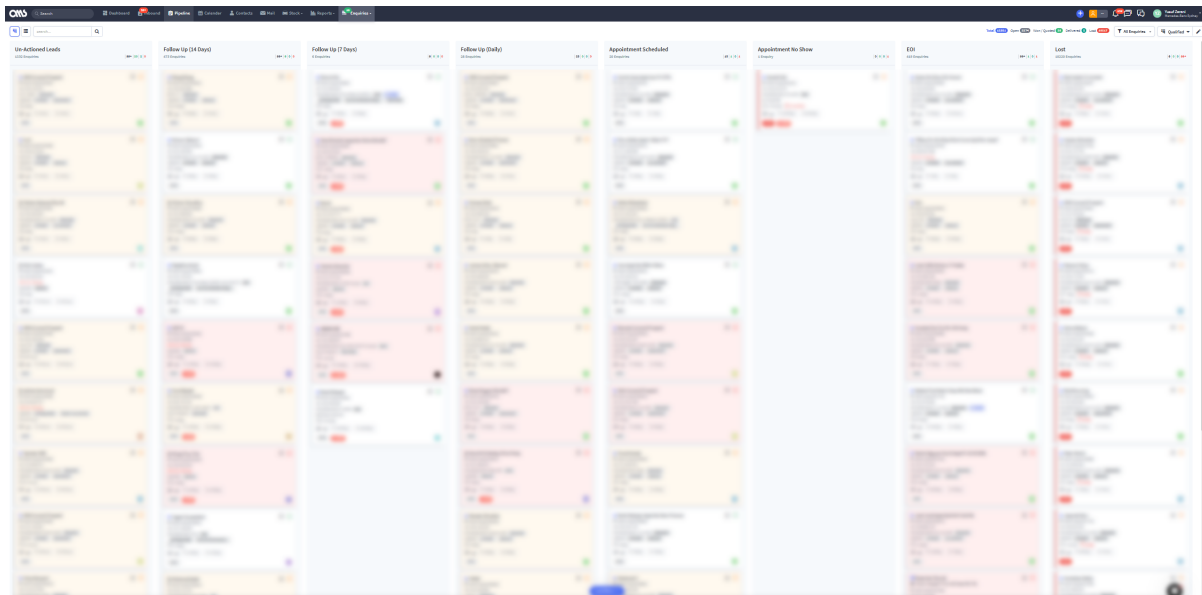
The Inbound section



Pipelines

Qualified

The Qualified pipeline is where the customer's journey to a vehicle being sold is defined into stages.

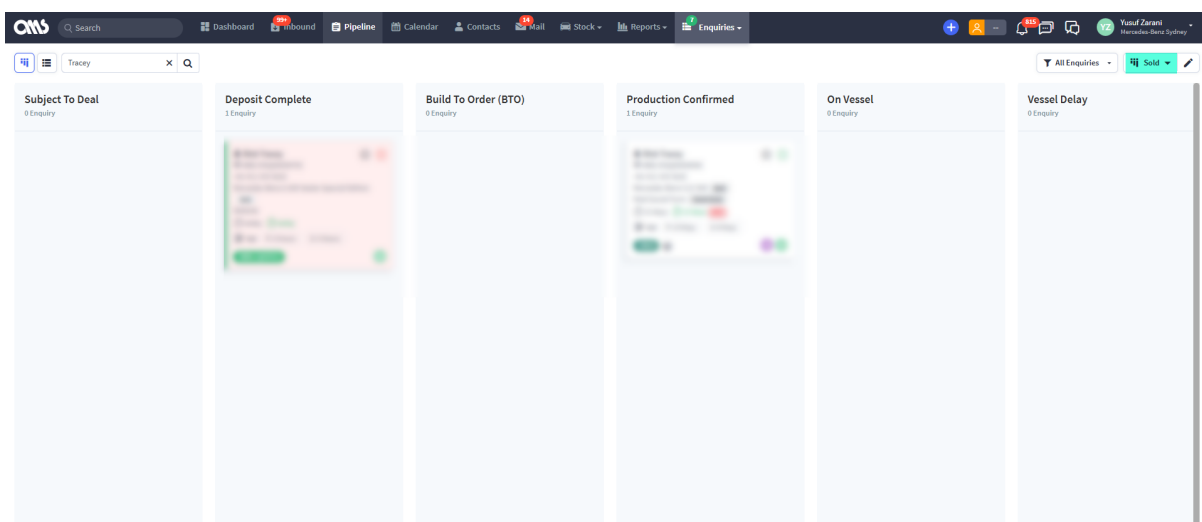


The customer journey starts with the “Unallocated Leads” stage, is where all the to be qualified leads that are allocated to the salesperson for qualification.

It is important to move the customer across the right as the various stages occur, as they will auto trigger emails/SMS messages to the customer.

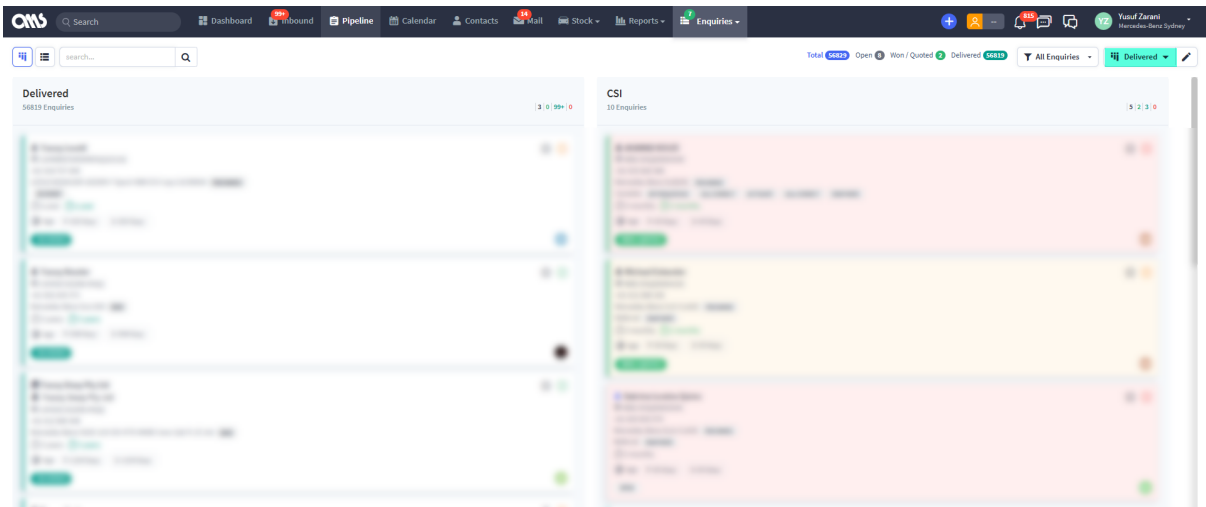
Sold

When a customer has completed the purchase and the enquiry has been marked to **Sold** the entry will move to the sold pipeline. Please move the enquiry across the stages as the status changes for automated



Delivered

When a vehicle has been marked as Delivered ([How To Update a Won / Delivered Date on an Enquiry](#)) it will be in this pipeline.



Enquiry

Key Enquiry fields

When in an enquiry, key information that needs to be captured is highlighted below.

Enquiry Type: How you found out about the customer

Origin: How the customer found out about us

Label: This is an indication of what the customer lifecycle is most likely to be [Hot:

Purchase within 7 days, Warm: Within 3 months Cold: 3 – 6 months

Enquiry Info		^
Finance Business Manager	TG Taylan Guner	▼
After Market Manager	select aftermarket manager	▼
Enquiry Type	Walk In	✕
Origin	Paid Social Form	✕
Campaign	select campaign	▼
Label	HOT	✕

Adding a vehicle to the enquiry

When you are in the enquiry for the customer,

The screenshot displays the 'Requirement' dialog box within a CRM interface. The background shows an enquiry for 'Dick Tracey' with various tabs like 'Contact info', 'Vehicles', 'Test Drive', etc. The 'Requirement' dialog is open, showing options for 'Vehicle Sale Type' (New or Used), 'Vehicle Information' (Make, Model, Year, Exterior/Interior Colour, Warranty, Stock Number, Reg. Number, Transmission, Price), and 'Other Info' (Safety, Comfort, Appearance, Warranty). A purple box highlights the 'Model' field, and a callout box says 'Choose Model for new vehicles / Stock to search for a vehicle, either New or Used'. A yellow circle '1' points to the '+' icon in the 'Vehicles' section, and a yellow circle '2' points to the 'Model' field. A yellow circle '3' points to the 'Save' button at the bottom right of the dialog.

Requirement

Vehicle Sale Type

New

Used

Vehicle Information

Make	Mercedes-Benz	Group	CLE	Type	Coupe
Model	CLE 300 Coupe	Year	2025		
Exterior Colour		Interior Colour / Trim			
Warranty Start Date		Warranty Expiry			
Stock Number		VIN Number			
Reg. Number		Registration Date			
Transmission		Price			

Quantity: 1

Other Info

Safety: Appearance, Warranty

Comfort: Appearance, Warranty

Cancel Save

Test Drives

Scheduling a Test Drive

It is important to create a test drive activity for the customer to ensure that they get reminders from the system.

Enquiry > Schedule Activity > Choose the Wheel for Test Drive

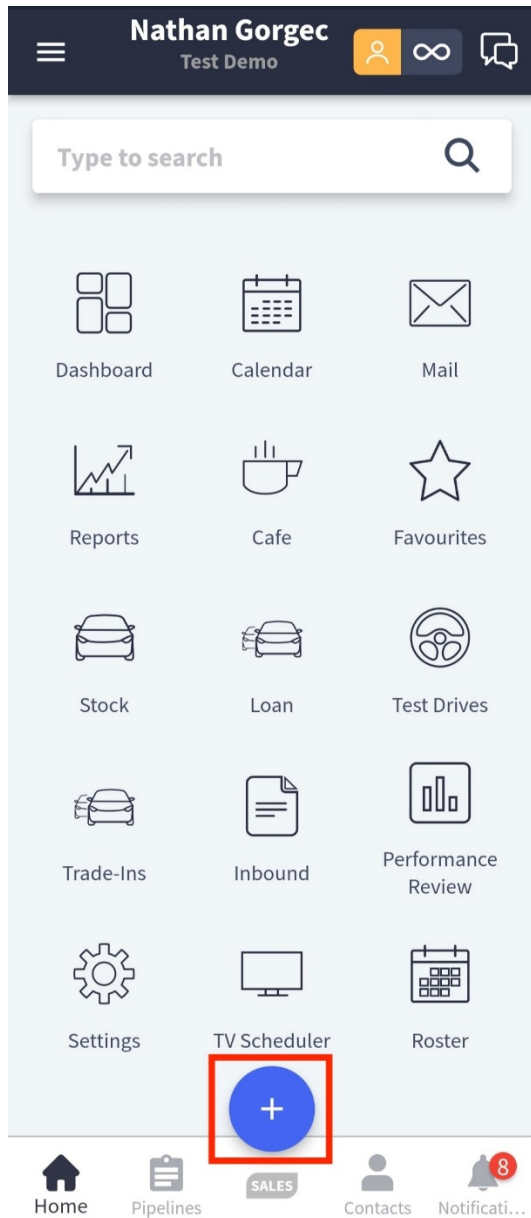
The screenshot displays a CRM interface with an 'Enquiry Info' sidebar and a main 'Edit Activity' modal. The sidebar shows contact details for Dick Tracey, including his license number and address. The modal is titled 'Edit Activity' and contains the following fields and options:

- Activity Name:** Test Drive
- Date:** 27/03/2026
- From:** 12:00 PM
- To:** 27/03/2026
- Reminder:** Select...
- Link Contact:** Dick Tracey (MBS-00003817)
- Link Enquiry:** MBS-ENQ00009092 (Mercedes-Benz CLE 300 NEW)
- Link Vehicle:** Select Vehicle
- Teammate:** select teammate
- Owner:** Yusuf Zarani
- Notes:** Write Something... (with a 'View Logs' button)
- Linked Activities:** You have no linked activities. (+ Add Log)
- Footer:** Created :27 Mar 2026 11:54 AM - Yusuf Zarani (+ Add Log, Cancel, Save, Save as Done)

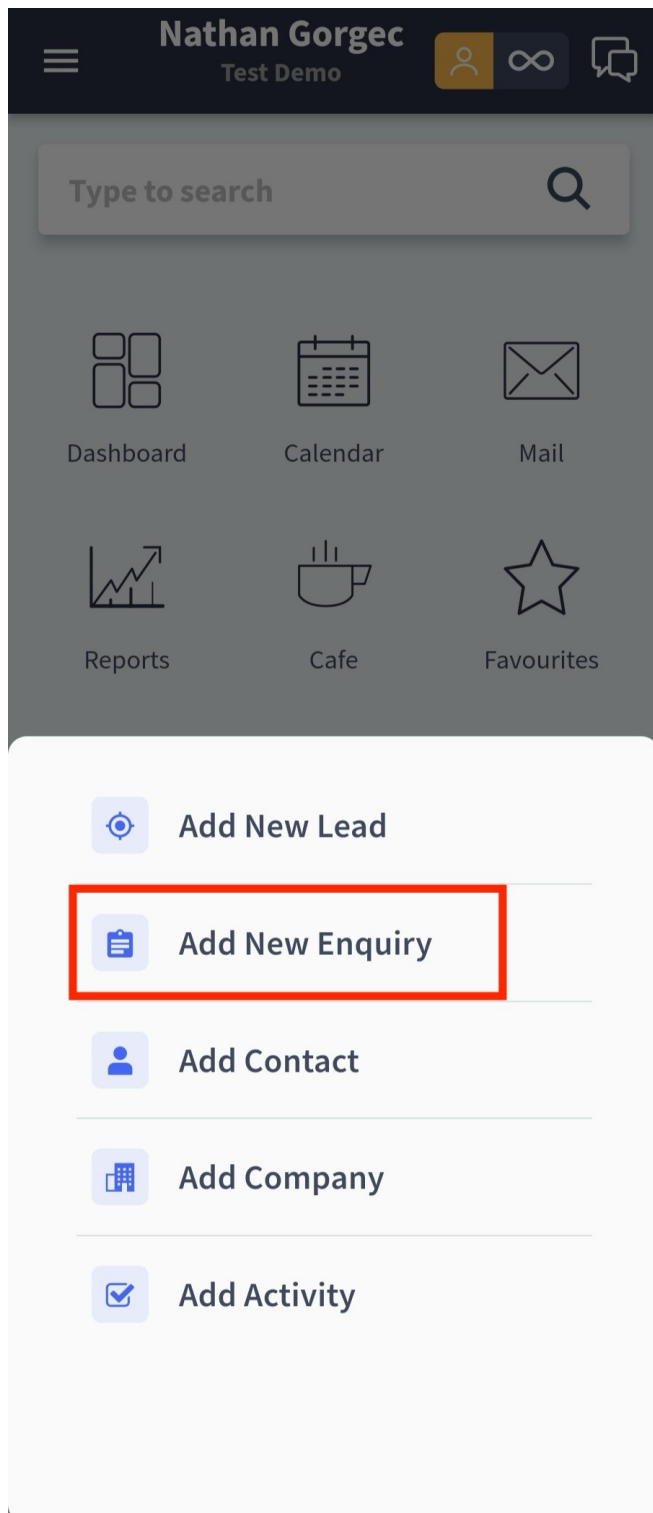
How to do a test drive in AMS Pro App (Mobile)

Starting a test drive

On the mobile dashboard start off by clicking on the "Blue +" button



Then click on "Add New Enquiry"












Add the necessary "Contact Info"







Delete **New** **Done**

Stage **Un-Actioned Leads** ▾

Current Status **OPEN** ▾

 CONTACT INFO	 VEHICLE	 TRADE-IN	 TEST DRIVE
 CAFE	 FILES	 NOTES	 EVENTS PRO
 PRODUCTS			





Next Activity Select date ▾

					
---	---	---	---	---	---

Appointment

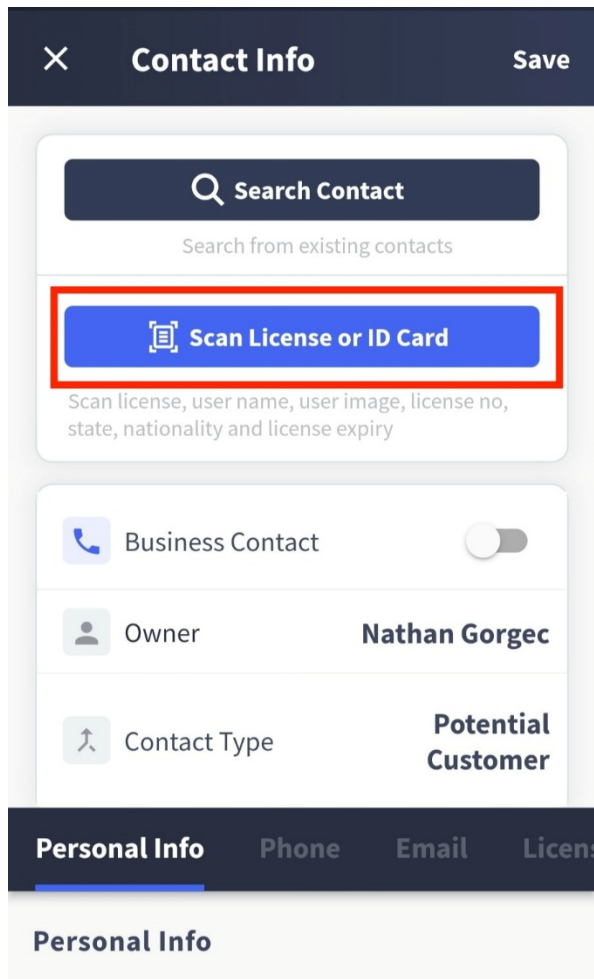
Enquiry Type Select one ▾

Origin Select one ▾

			
---	---	---	---

Campaign Select one ▾

You can "Scan Licence or ID Card" or Search Contact if the person already exist in the system



Then from there click "Test Drive" to begin the test drive

Delete

New



Done

Stage

Un-Actioned Leads

Current Status

OPEN



CONTACT INFO



VEHICLE



TRADE-IN



TEST DRIVE



CAFE



FILES



NOTES



EVENTS PRO



PRODUCTS

Next Activity

Select date



Appointment

Enquiry Type

Select one

Origin

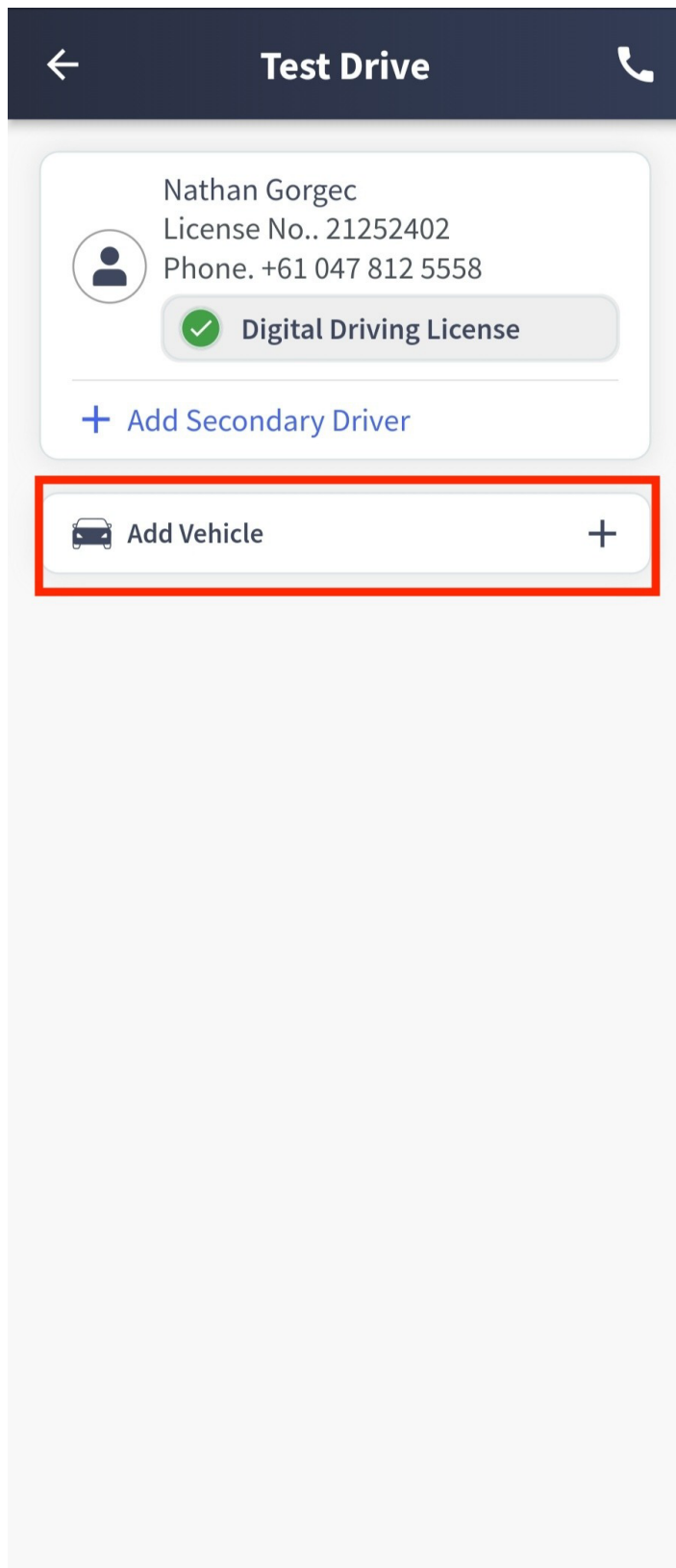
Select one



Campaign


Select one

Click "Add Vehicle"



Select the vehicle the customer is interested to go on a test drive

← **Stock** 🔍 ☰




Mazda MX-5 RF GT
🚗 6,015 kms 🚗 RF
2021
TD Test Demo

Stock No	Reg No	VIN No
1322	--	--

DEMO AVAILABLE

4 Enquiries First Enquiry Date : 11 Jan 2023 >




Nissan Leaf SL Plus
🚗 10,010 kms
2022
TD Test Demo

Stock No	Reg No	VIN No
13	--	--

Not for Loan

NEW AVAILABLE

4 Enquiries First Enquiry Date : 18 Jan 2022 >



BMW iX3
🚗 31,234 kms
2022
TD Test Demo

Stock No	Reg No	VIN No
14	--	--

Not for Loan

+

Travelling With the Customer in the Test Drive

If you are going with the customer, make sure the customer signs the T&Cs before going on a test drive, then instead of selecting "Car Handover" which is highlighted in Blue, you will instead select "Start" which is highlighted in Orange


Test Drive

Nathan Gorgec
License No.. 21252402
Phone. +61 047 812 5558

Digital Driving License

+ Add Secondary Driver

Vehicle Details

 **Mazda MX-5 RF GT**
2021
Reg No.

TD Test Demo

Current Odometer Reading* **6,015**

Trade Plate* trade plate

Before Test Drive

Vehicle Inspection +

Terms & Conditions* +

Insurance Waiver +

Car Handover

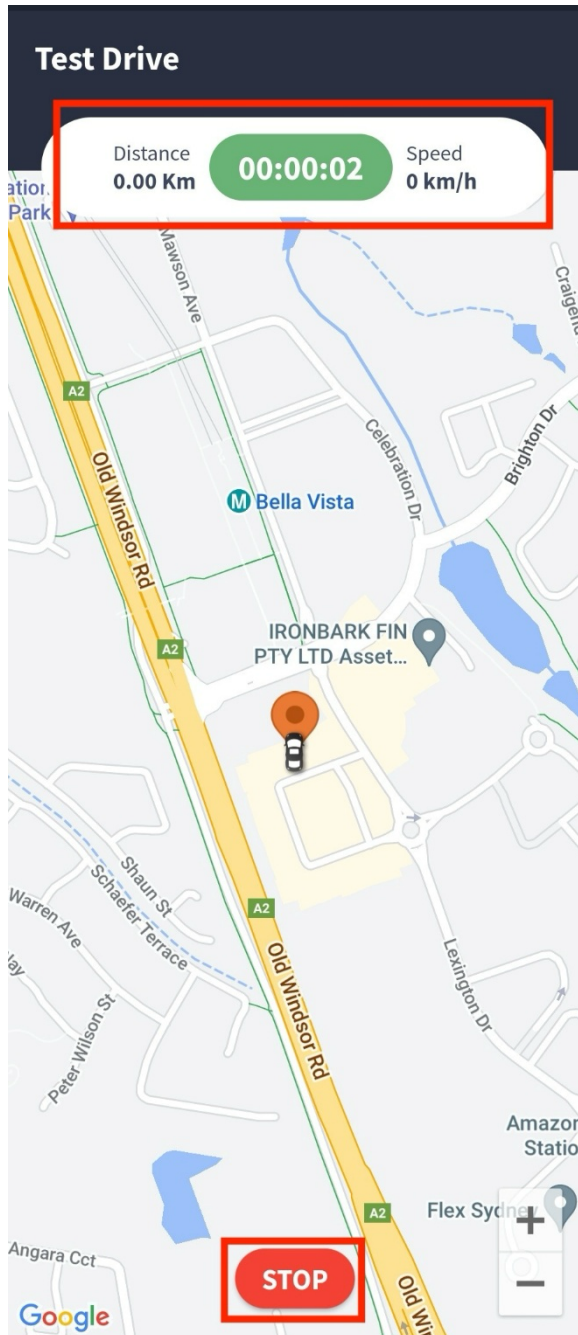
Notes

write your notes here


START


Once on a test drive it will GPS track your travels with the customer showing Distance, Time and Speed.

When you have done with your test drive just click "STOP"




Once you click on STOP make sure the customer signs the vehicle back in and click on Finish.

 Insurance Waiver

 View Map >

RESTART


After Test Drive

 Duration ✓

Start Time 4/09/2024 11:47 AM


End Time* 4/09/2024 11:47 AM

End Odometer Reading* **6,015**

 Vehicle Inspection +

Damaged Vehicle

 Signature +

 Feedback

★ ★ ★ ★ ★

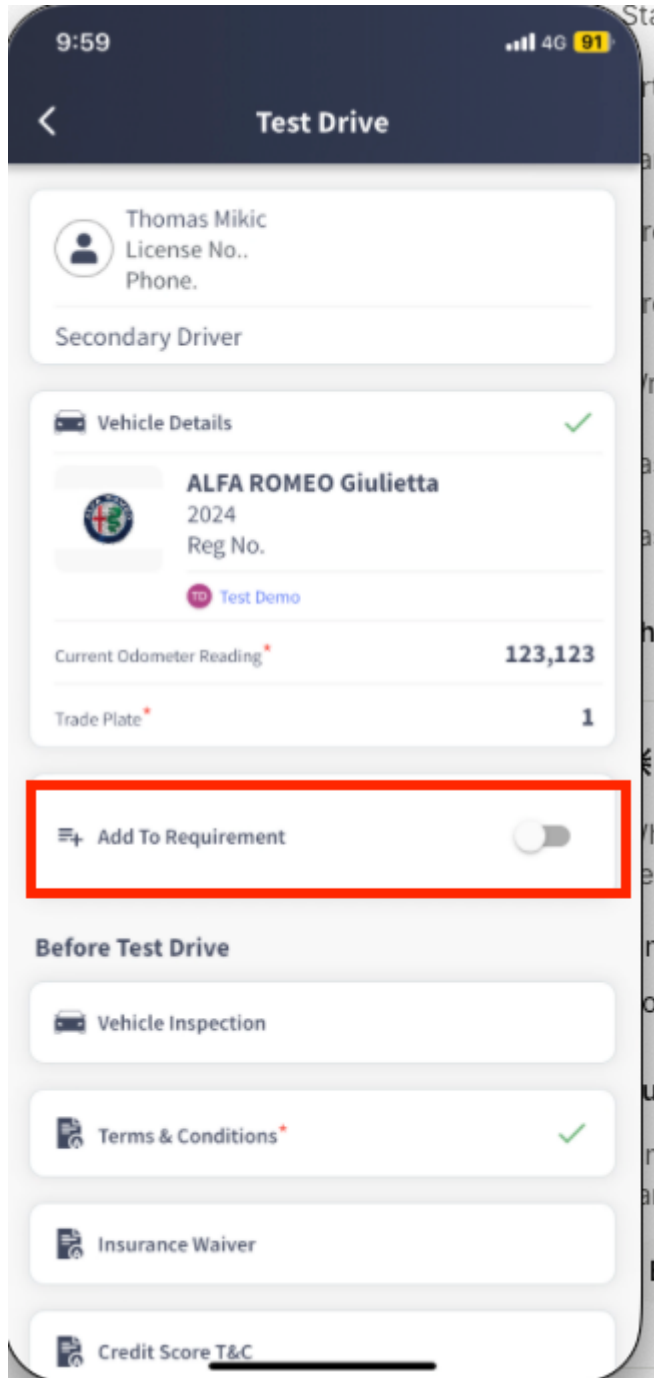
Notes

write your notes here

FINISH

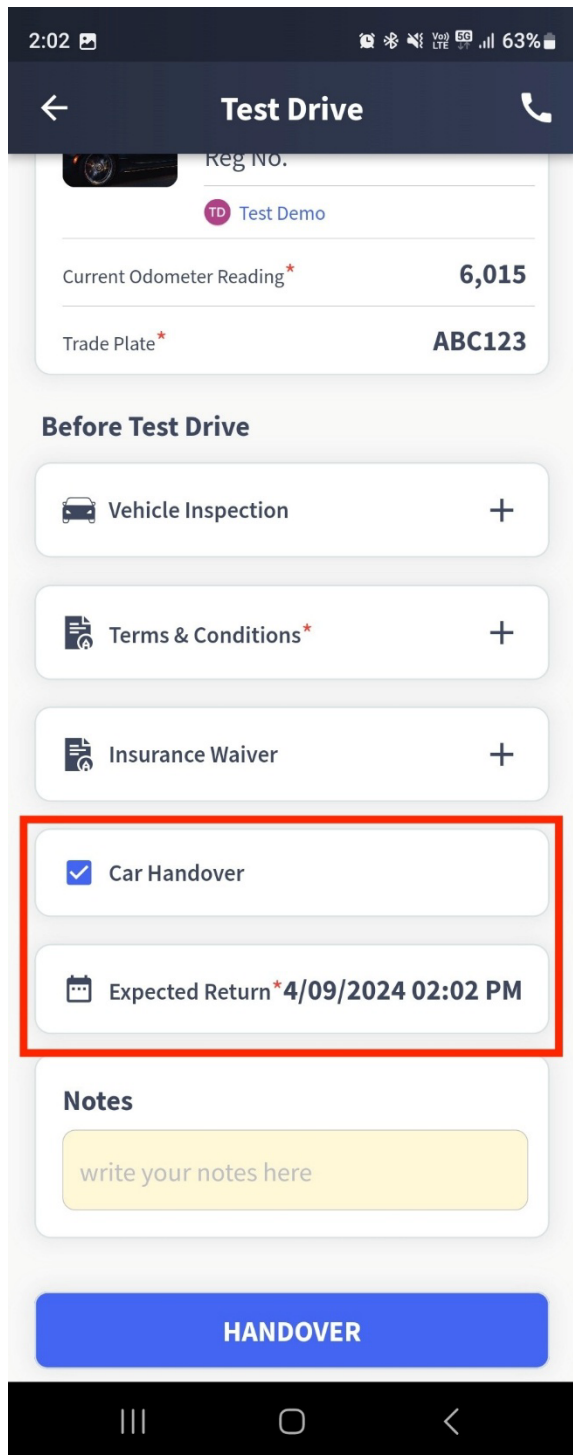
***** NOTE *****

Also, you can add the test drive vehicle to the enquiry requirement by clicking on the "Add To requirement button", This process is also available in the handover test drive section.



Handover Test Drive

Tick the Car handover box to apply Car Handover and add the "Expected Return" Date and then click "Handover"




Once vehicle is on a test drive, head into the enquiry and Click on "Test Drive"


Delete **New** **Done** ▼

Stage **Un-Actioned Leads** ▼


Current Status **OPEN** ▼




CONTACT INFO




VEHICLE




TRADE-IN




TEST DRIVE




CAFE




FILES



NOTES





EVENTS PRO





PRODUCTS


Next Activity **Select date** ▼

















Appointment


Enquiry Type **Select one** ▼

Origin **Select one** ▼



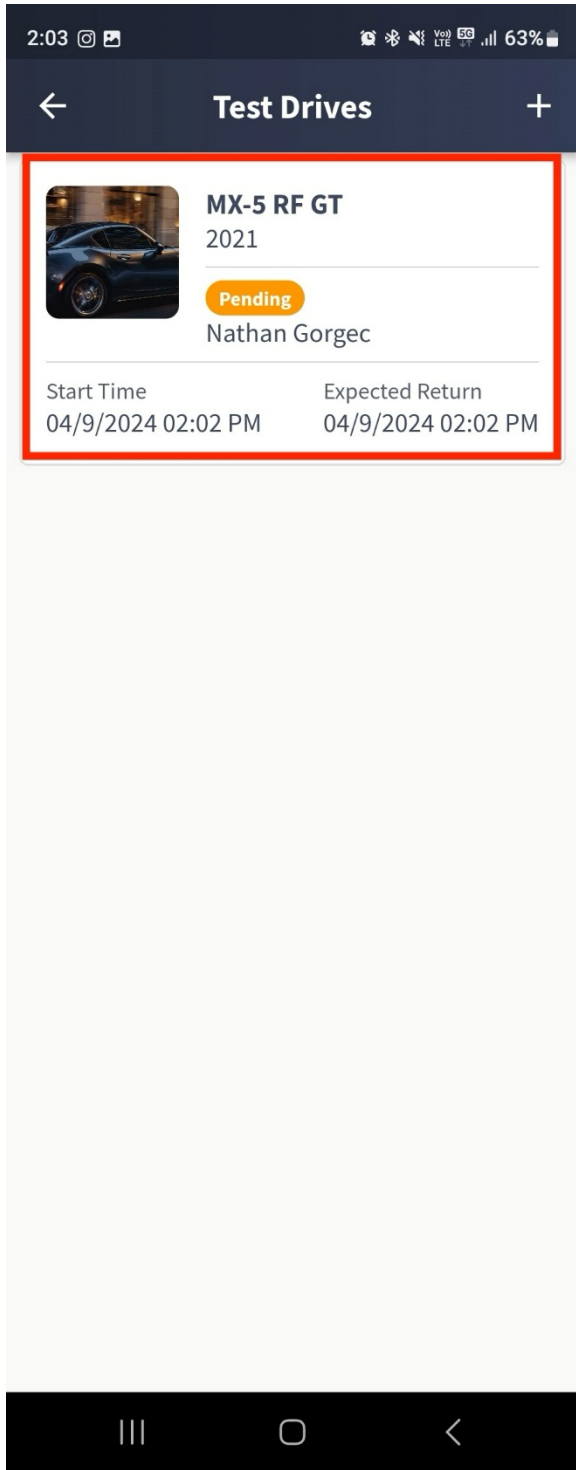






Campaign **Select one** ▼

Select the Pending vehicle that is currently on a test drive



Then follow the steps shown in screenshot below, please ensure you get the customer's signature when returning a test drive.

Test Drive

Insurance Waiver

Car Handover

Expected Return* 4/09/2024 02:02 PM

After Test Drive

Duration ✓
Start Time 4/09/2024 02:02 PM
End Time* 4/09/2024 02:03 PM
End Odometer Reading* 6,015

Vehicle Inspection +

Damaged Vehicle

Signature ✓

Feedback
★ ★ ★ ★ ★

Notes
write your notes here

FINISH

How to do a test drive in AMS Pro App (Desktop)

NOTE: To add a test drive vehicle, an enquiry must be created.

1. Click on the **'+Add'** button located under the **Test Drive** section to begin the process of adding a test drive vehicle. Once you click the button, follow the prompts to select and add the vehicle you'd like to include for the test drive, as demonstrated in the example below.

The screenshot shows the 'Add New Enquiry' interface in the AMS Pro App. The top navigation bar includes 'Save' and 'Delete' buttons. Below the header, there's a 'Pipeline > New' dropdown and a status bar showing 'Enquiry age: 11 minutes | Pipeline Age: 11 Minutes | Stage Age: 11 Minutes | Inactive: a few seconds'. The main content area is divided into several sections:

- Contact Info:** Includes fields for name and phone number.
- Vehicles:** A section with a '+ Add' button and a dropdown arrow.
- Test Drive:** A section with a '+ Add' button and a dropdown arrow. A red arrow points to this button.
- Trade-In:** A section with a '+ Add' button and a dropdown arrow.
- Cafe:** A section with a '+ Add' button and a dropdown arrow.
- Finance:** A section with a '+ Add' button and a dropdown arrow.
- Files:** A section with a '+ Add' button and a dropdown arrow.
- Events Pro:** A section with a dropdown arrow.
- Feedback:** A section with a dropdown arrow.

The right-hand side of the form contains an 'Enquiry Info' section with various dropdown menus and input fields, including 'Finance Business Manager', 'Enquiry Type', 'Origin', 'Campaign', 'Label', 'Purchase Intention', 'Estimated Delivery Date', 'Deposit Amount', 'Deposit Receipt Number', 'Gross Amount', 'Sales Contract Number', and 'Lead Source'. The bottom of the form has a 'COMPLETED' status bar and a list of tabs: 'All', 'Notes', 'Activities', 'Messages', 'Calls', 'Emails', 'EDMs', and 'Change Logs'.

2. To select the vehicle for the test drive, click on the **'Add Vehicle'** button. Then, input the required details as indicated in the red box below. After entering the information, make sure to click **'Save'** to finalize the selection and store the details.

Test Drive

No Vehicle has been selected

Bob Jane
Contact ID: DTD-00000030
License Number: --
CUSTOMER CONSENT

+ Add Secondary Driver

Before Test Drive

Vehicle Handover

Start Date	Start Time	Current Odometer Reading	Trade Plate
20/11/2024	11:19 AM	current odometer reading	trade plate

After Test Drive

End Date	End Time	End Odometer Reading
DD/MM/YYYY	HH:MM	end odometer reading

Notes

Write Something...

Cancel

Save

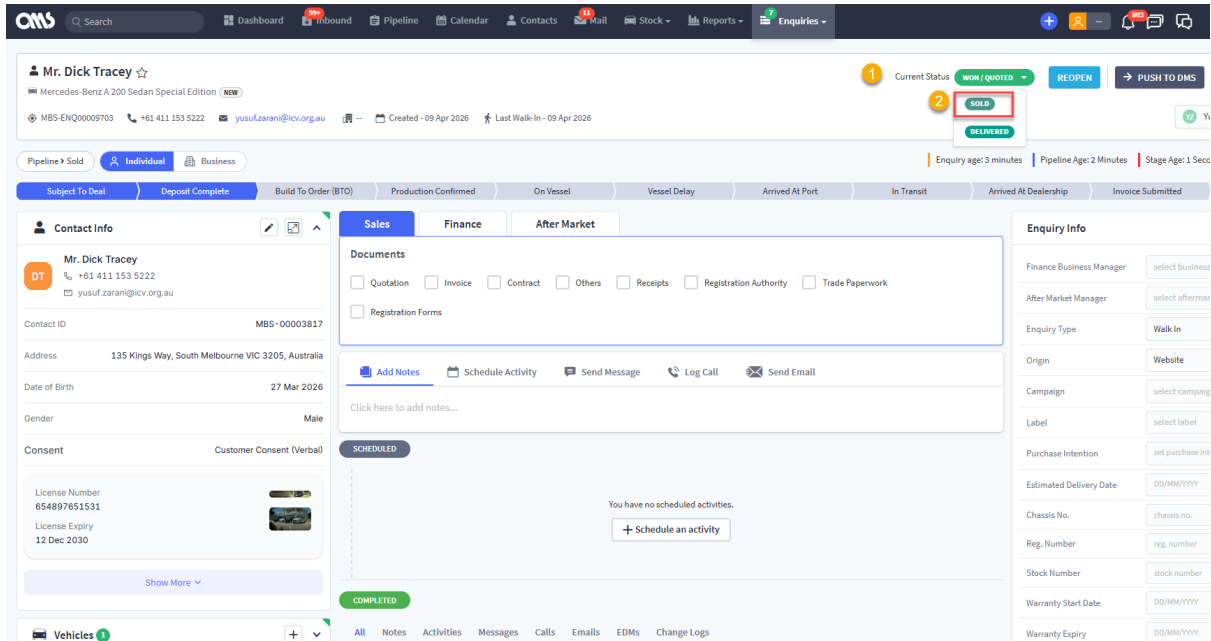
3. After successfully adding the test drive vehicle, save the enquiry by clicking the **'Save'** button located in the top-right corner of the screen, as shown in the image below. This will ensure that all the details are securely stored.

The screenshot shows the 'Add New Enquiry' interface. At the top right, there are 'Save' and 'Delete' buttons. A red arrow points to the 'Save' button. The form includes the following sections:

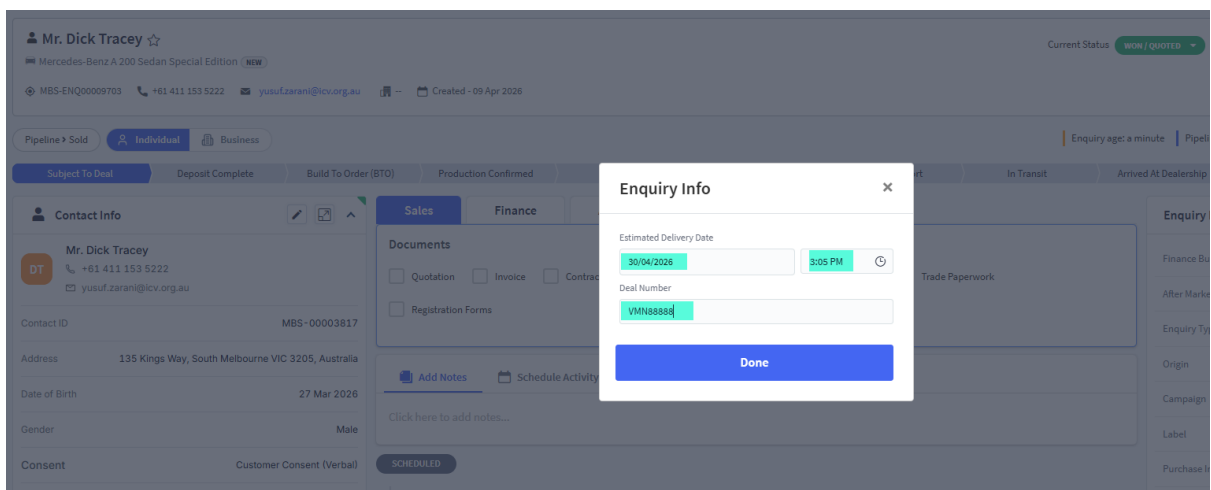
- Contact Info:** Name: Mr Bob Jane (Nathan), Phone: +61 011 112 4558, Email: DTD-ENQ00000210, Created: 20 Nov 2024, Last Walk-In: 20 Nov 2024.
- Pipeline:** Un Actioned Leads, Contacted, Appointment Scheduled, **Test Drive Completed**, Proposal, Won, Delivered, Lost.
- Documents:** Quotation, Invoice, Contract, Others.
- Test Drive:** Mazda MX-5 RF GT, Stock#:1322 | 2021, Start Time: 20/11/2024 11:19 AM, End Time: 20/11/2024 11:27 AM, Status: COMPLETE.
- Enquiry Info:** Finance Business Manager, Enquiry Type: Walk In, Origin: In-Person Prospect, Campaign, Label, Purchase Intention, Estimated Delivery Date, Deposit Amount, Deposit Receipt Number, Gross Amount.

Sold

When a vehicle has been sold, please go into the enquiry and change the status from Won/Quoted to **Sold**



Enter the estimated delivery date and time and the ERA deal number.

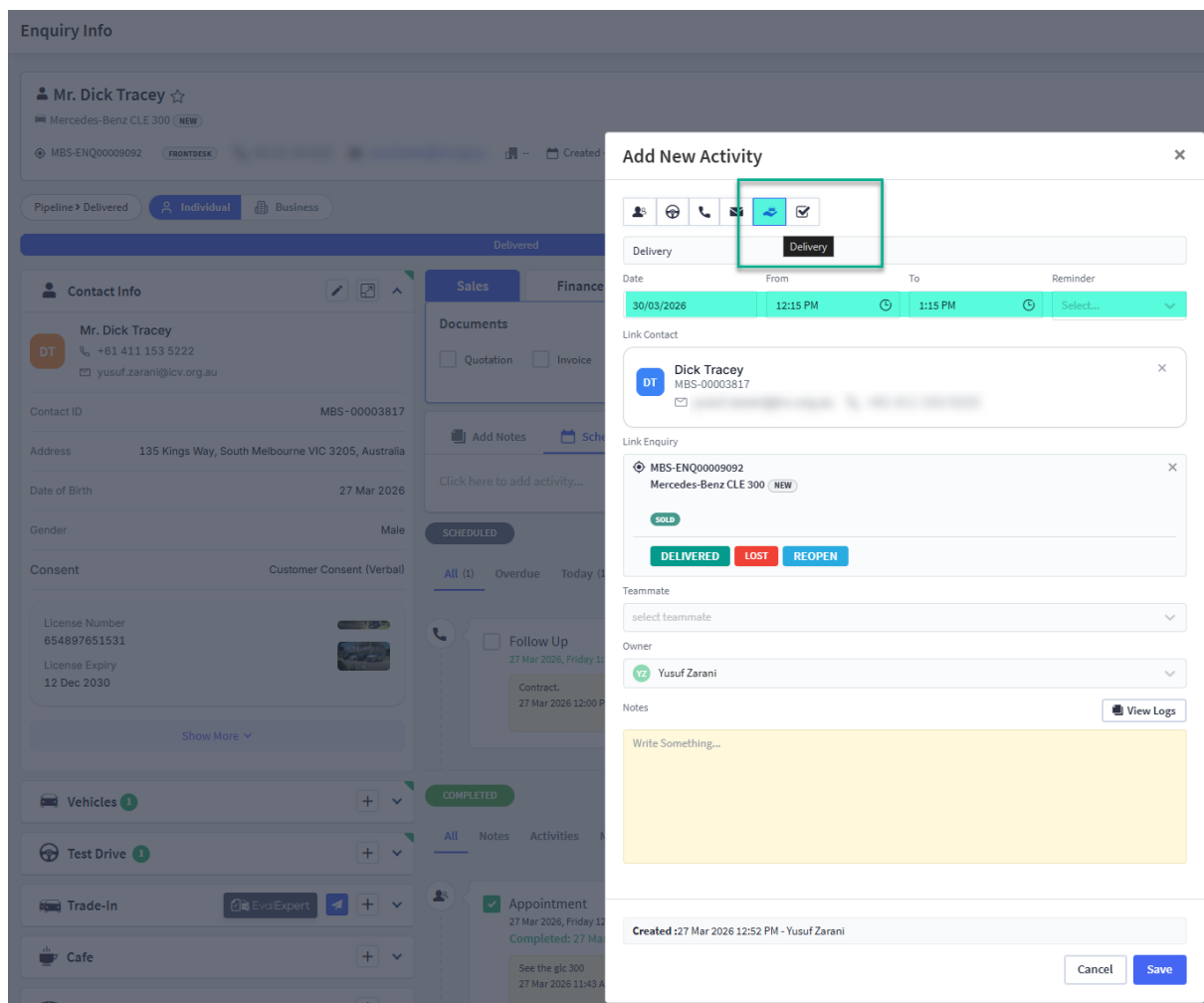


Delivery

Scheduling delivery

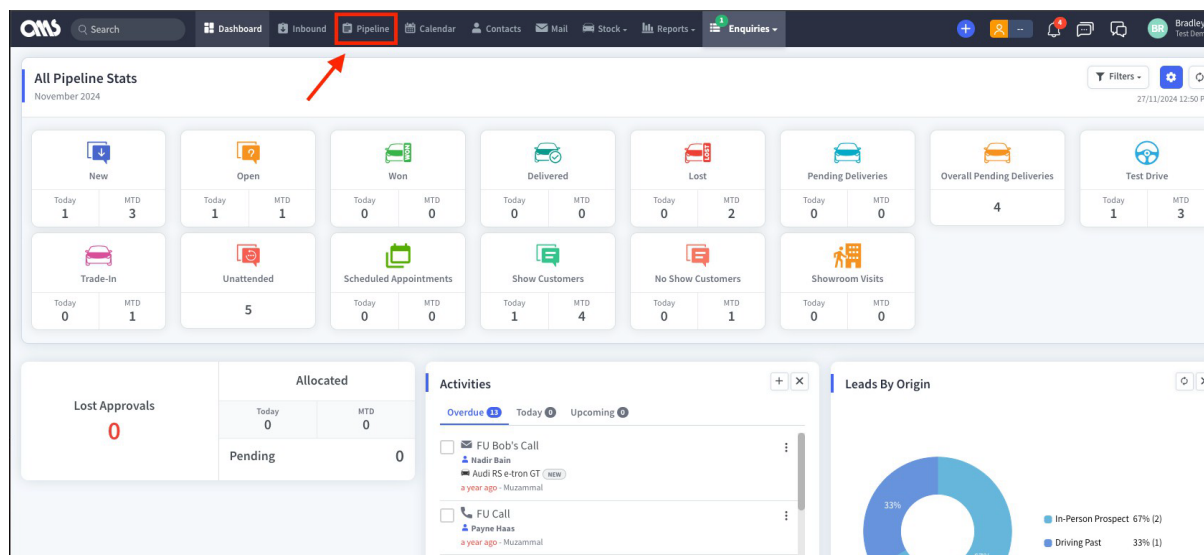
When the vehicle is ready for delivery it is important that we schedule a new activity for the date the vehicle is being delivered.

This step is vital for the automated emails pertaining to the delivery of a vehicle being sent out such as the “checklist for customers”

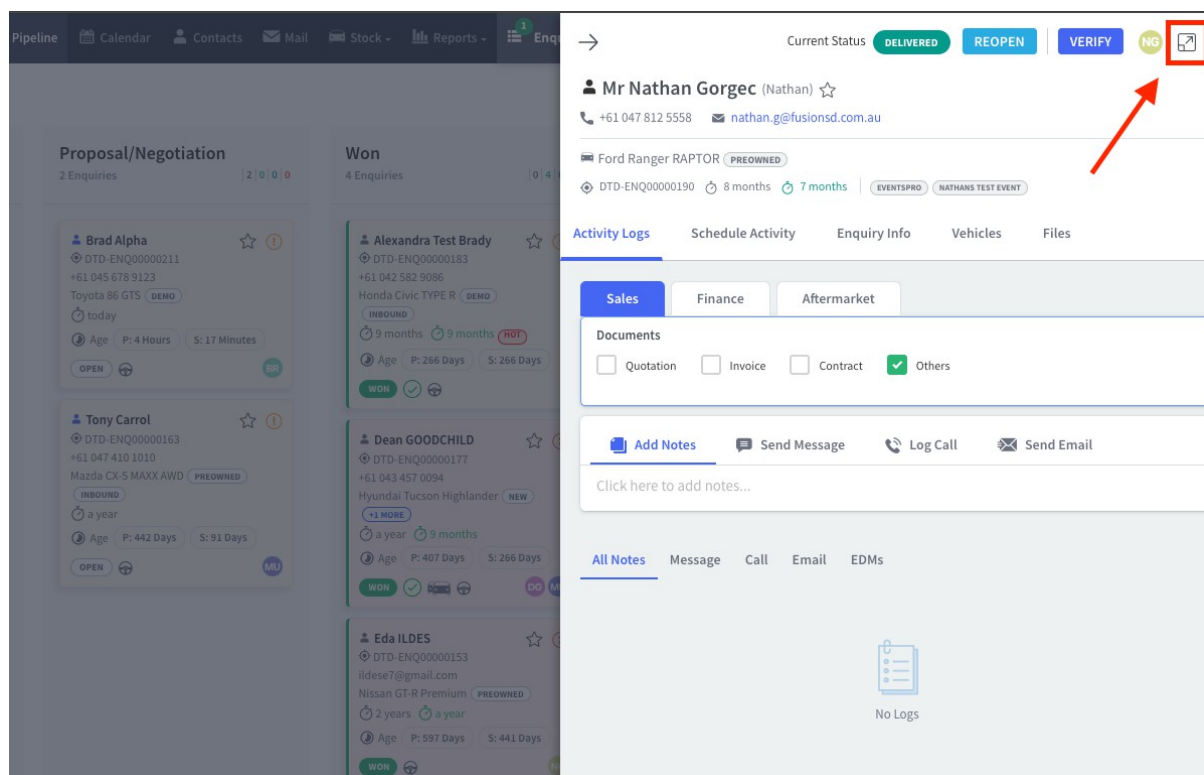


How To Update a Won / Delivered Date on an Enquiry

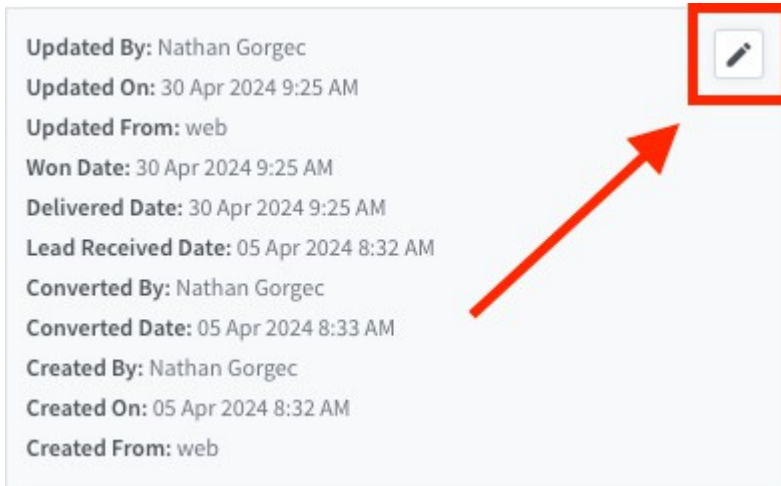
Go to **Pipelines** by clicking on the **Pipeline icon** in the icons dashboard at the top of your screen.



Navigate to the **Delivered Pipeline**, locate and click on the enquiry you wish to change and click on the **Details icon** to expand to the enquiry:

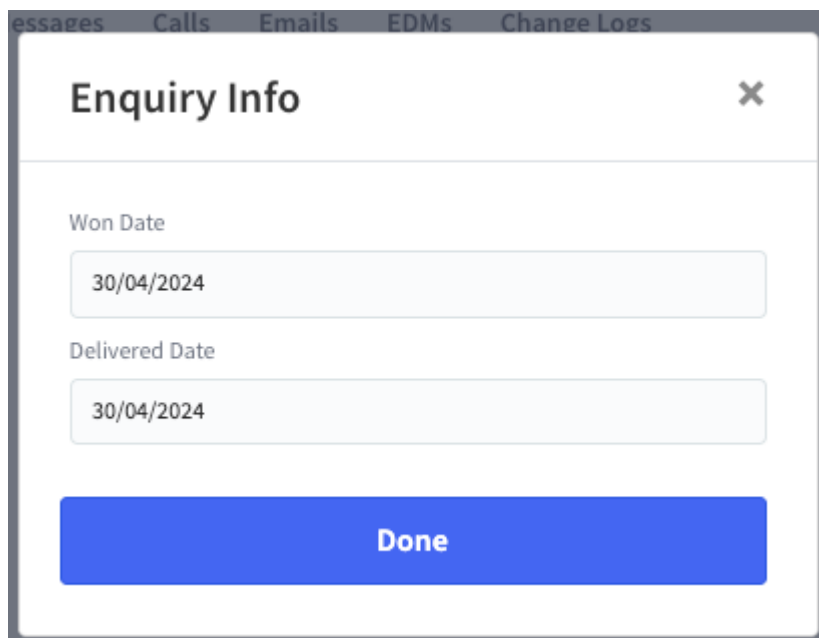


Then under **Enquiry Info** section on the right, scroll down and if you have access to this field, you will see a greyed out section like this example below. Click on the **Edit** button:



Updated By: Nathan Gorgec
Updated On: 30 Apr 2024 9:25 AM
Updated From: web
Won Date: 30 Apr 2024 9:25 AM
Delivered Date: 30 Apr 2024 9:25 AM
Lead Received Date: 05 Apr 2024 8:32 AM
Converted By: Nathan Gorgec
Converted Date: 05 Apr 2024 8:33 AM
Created By: Nathan Gorgec
Created On: 05 Apr 2024 8:32 AM
Created From: web

An **Enquiry Info** window will open allowing you to change the date by clicking on the date field. Press **Done** to apply the change:



Messages Calls Emails EDMs Change Logs

Enquiry Info

Won Date
30/04/2024

Delivered Date
30/04/2024

Done

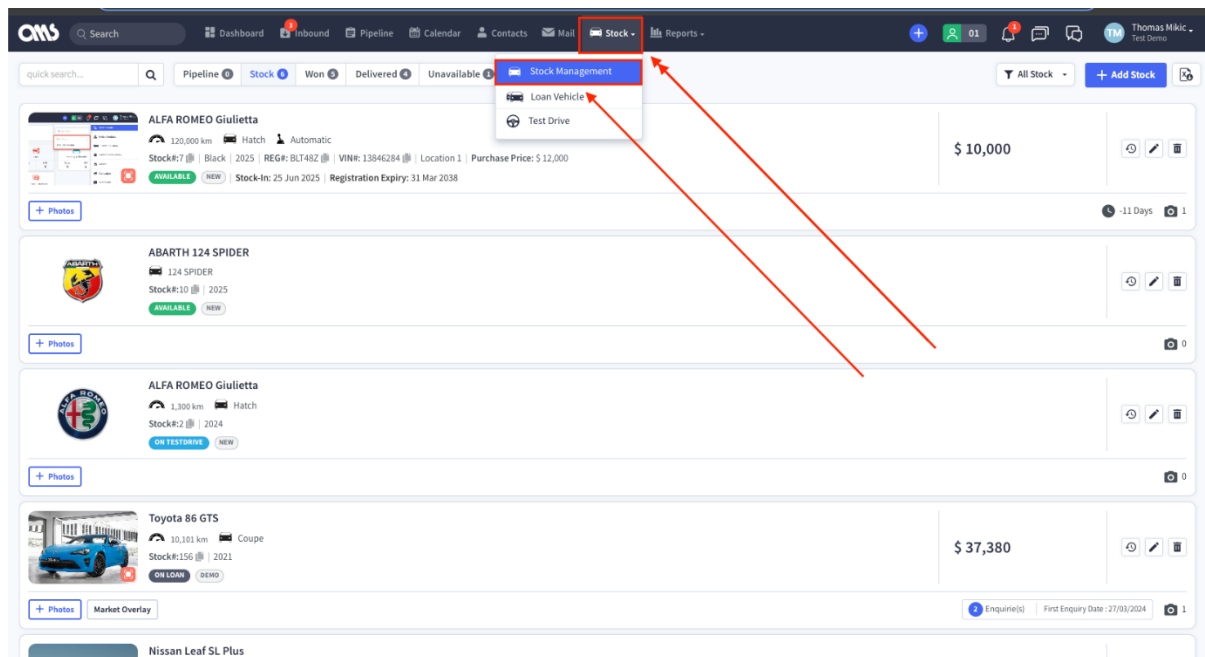
Stock Management

How to make stock available in AMS Pro (Desktop)

How to make manage available stock in AMS Pro (Desktop)

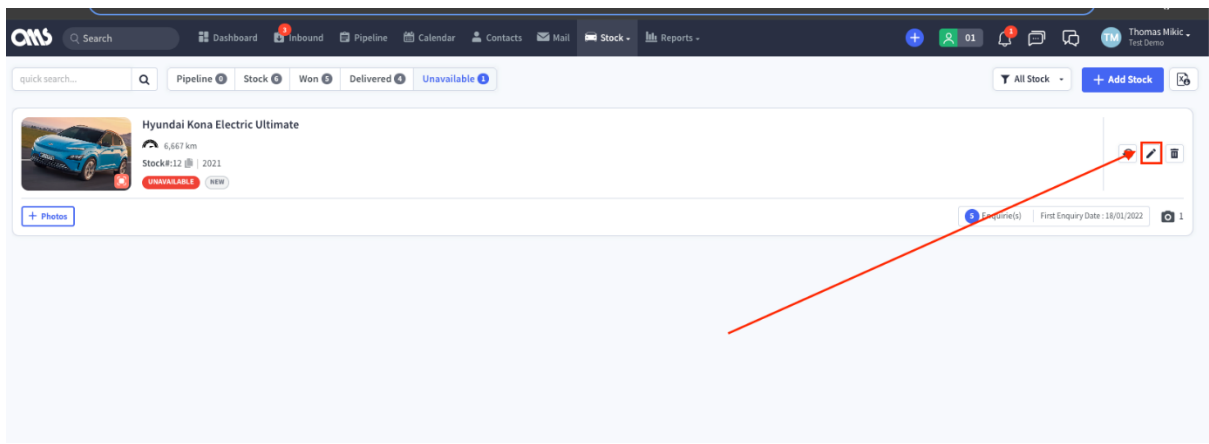
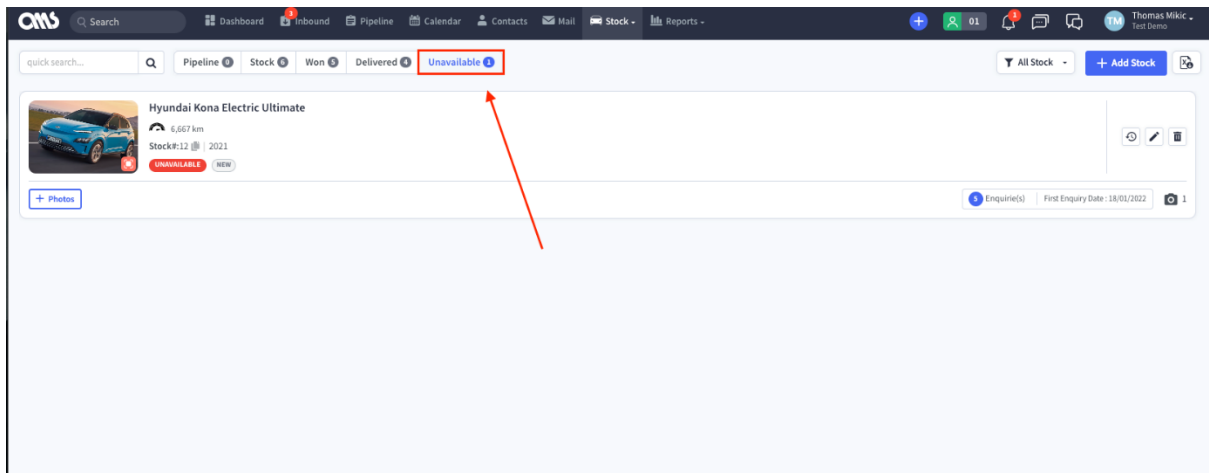
Step 1: Access the Stock Management Module

To begin, navigate to your stock inventory. Click on the "Stock" tab in the main navigation bar. From the dropdown menu that appears, select "Stock Management" to view your comprehensive list of vehicles.



Step 2: Locate the Stock Item to Manage

On the Stock Management page, browse or use the quick filters (like "Unavailable" if you're looking for items to make available) to find the specific vehicle whose availability you wish to manage. For instance, if you're working with an item currently marked as "Unavailable," selecting that quick filter will display it.



Step 3: Open the Stock Edit Form

Once you've located the desired stock item, look to the right side of its entry. You will see an "Edit" icon (often represented by a pencil). Click this icon to open the detailed stock edit form for that specific vehicle.

The screenshot shows a 'Stock' edit form with various fields. The 'Status' dropdown is open, showing the following options: UNAVAILABLE (red), AVAILABLE (green), WON (grey), DELIVERED (green), ON LOAN (grey), ON TESTDRIVE (blue), RESERVED (orange), IN PRODUCTION (orange), and UNAVAILABLE (blue). A red arrow points to the 'AVAILABLE' option.

Step 4: Change the Stock Status

Inside the stock edit form, find the "Status" dropdown field. This field allows you to define the current availability or state of the vehicle. Click on the dropdown, and a list of options will appear, including:

- **AVAILABLE:** To mark the vehicle as ready for sale or use.
- **UNAVAILABLE:** To indicate the vehicle is not currently ready.
- **WON:** For vehicles that have been sold.
- **DELIVERED:** For vehicles that have been handed over to the customer.
- **ON LOAN:** If the vehicle is out on loan.
- **ON TESTDRIVE:** If the vehicle is currently out for a test drive.
- **RESERVED:** If the vehicle is reserved.

- **IN PRODUCTION:** If the vehicle is still being manufactured or prepared.

Select the appropriate status from this list, such as "AVAILABLE" to make the stock item available.

Step 5: Save Changes

The screenshot shows a 'Stock' form with the following fields and values:

- Available For: Test Drive, Sale, Loan Vehicle, Service Loan
- Make: Hyundai
- Group: select group
- Type: select type
- Model: Kona Electric Ultimate
- Year: 2021
- Model Description: model description
- Stock Number: 12
- VIN Number: vehicle identification number
- Reg. Number: registration number
- Registration State: select registration state
- Registration Date: DD/MM/YYYY
- Registration Expiry: DD/MM/YYYY
- Exterior Colour: exterior colour
- Interior Colour / Trim: interior colour
- Build Date: MM/YYYY
- Warranty Start Date: 04/06/2025
- Warranty Expiry: DD/MM/YYYY
- Price: \$
- Purchase Price: \$
- Odometer Reading: 6,667
- Location: select location
- Usage: select usage
- Transmission: select transmission
- Transport Method: select transport method
- Trade Plate: trade plate
- Sale Type: New
- Stock Intake Date: DD/MM/YYYY
- Stock ETA Date: DD/MM/YYYY
- Est Dealer FOK Date: DD/MM/YYYY
- Status: UNAVAILABLE

Buttons: + Add Note, + Add Stock, Cancel, Save

After selecting the new status and making any other necessary adjustments to the stock details, click the "Save" button located at the bottom right of the form. This will apply your changes to the stock item.

Step 6: Verify the Status Update

The screenshot shows the Stock Management list with the following entries:

- Hyundai Kona Electric Ultimate**: 6,667 km, Stock#: 12 | 2021, Status: AVAILABLE, NEW
- ALFA ROMEO Giulietta**: 120,000 km, Hatch, Automatic, Stock#: 7 | Black | 2025, REG#: BLT482 | VIN#: 13846284 | Location 1 | Purchase Price: \$ 12,000, Status: AVAILABLE, NEW, Stock-In: 25 Jun 2025 | Registration Expiry: 31 Mar 2038

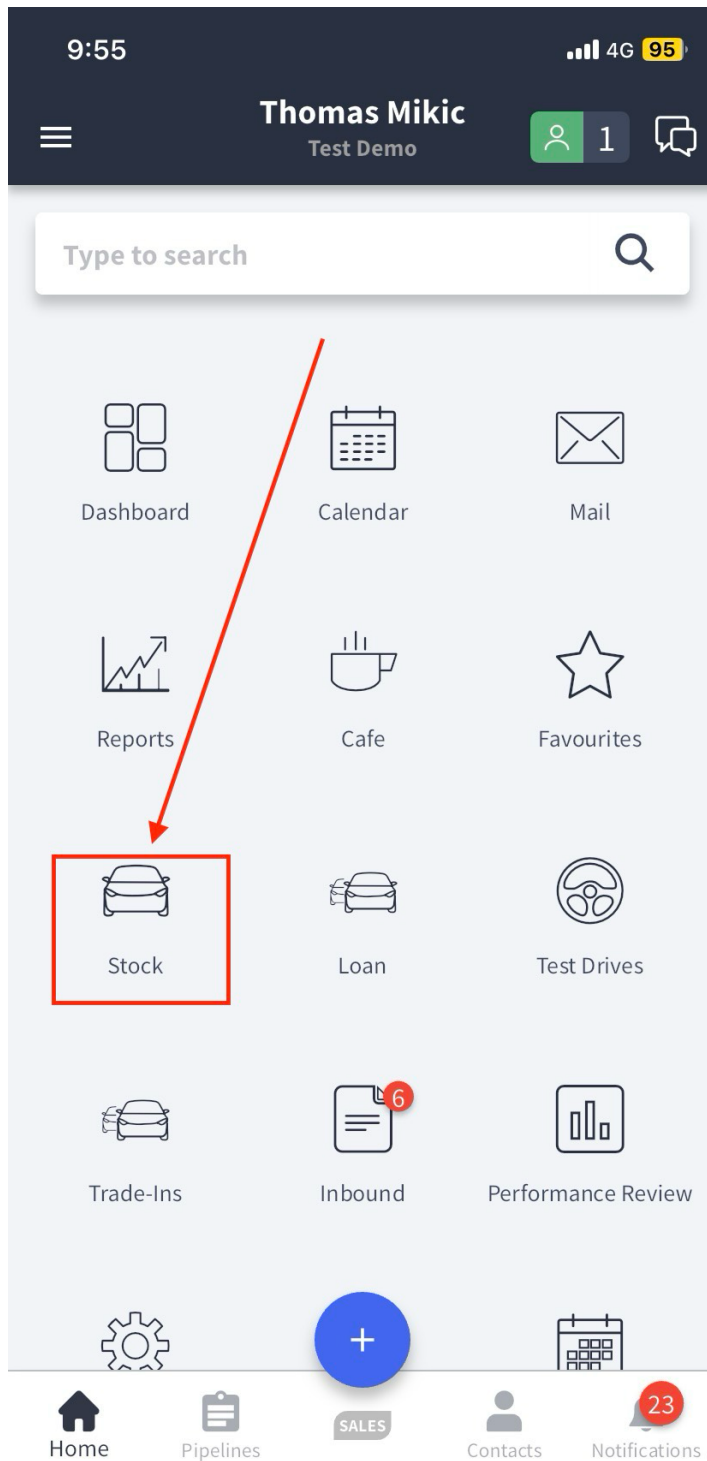
Upon saving, you will be redirected back to the Stock Management list. The stock item's new status will now be reflected on its entry, confirming that its availability has been successfully updated.

How to make stock available in AMS Pro (Mobile)

How to make manage available stock in AMS Pro (Mobile)

1. Access the Stock Module:

From the main dashboard of your AMS Pro (Mobile) app, tap on the "Stock" icon. This will display a list of all your current vehicle stock.



2. Select the Desired Vehicle:

Browse through your stock list and tap on the specific vehicle you wish to make available. This will open the "Stock Details" screen for that vehicle.

The screenshot shows a mobile application interface with a dark blue header. The time is 10:07, and the status bar shows 4G and 93% battery. The header contains a back arrow, the word "Stock", a search icon, and a menu icon. Below the header, there are three vehicle listings, each enclosed in a light gray rounded rectangle. The first listing, "Nissan null", is highlighted with a red border. It features a white car image, 10,010 kms, 2002, and a "Test Demo" tag. Below the image is a table with columns "Stock No", "Reg No", and "VIN No", containing values "13", "--", and "--" respectively. At the bottom of the listing are buttons for "NEW" and "UNAVAILABLE", and a bar showing "6 Enquiries" and "First Enquiry Date : 18 Jan 2022 >". The second listing, "Tesla null", features a red car image, 2 kms, 2022, and a "Test Demo" tag. It has a table with "Stock No: 2022", "Reg No: --", and "VIN No: --". Below are buttons for "NEW" and "ON LOAN", and a bar showing "1 Enquiries" and "First Enquiry Date : 14 Jan 2022 >". The third listing, "Hyundai Kona Electric Ultimate", features a blue car image, 6,667 kms, 2021, and a "Test Demo" tag. It has a table with "Stock No: 12", "Reg No: --", and "VIN No: --". Below are buttons for "NEW" and "AVAILABLE", and a blue circular button with a white plus sign. The bottom of the screen shows a black home indicator bar.

10:07 4G 93

< Stock >

Nissan null
10,010 kms
2002
TD Test Demo

Stock No	Reg No	VIN No
13	--	--

NEW UNAVAILABLE

6 Enquiries First Enquiry Date : 18 Jan 2022 >

Tesla null
2 kms
2022
TD Test Demo

Stock No	Reg No	VIN No
2022	--	--

Not for Test Drive Loan

NEW ON LOAN

1 Enquiries First Enquiry Date : 14 Jan 2022 >

Hyundai Kona Electric Ultimate
6,667 kms
2021
TD Test Demo

Stock No	Reg No	VIN No
12	--	--

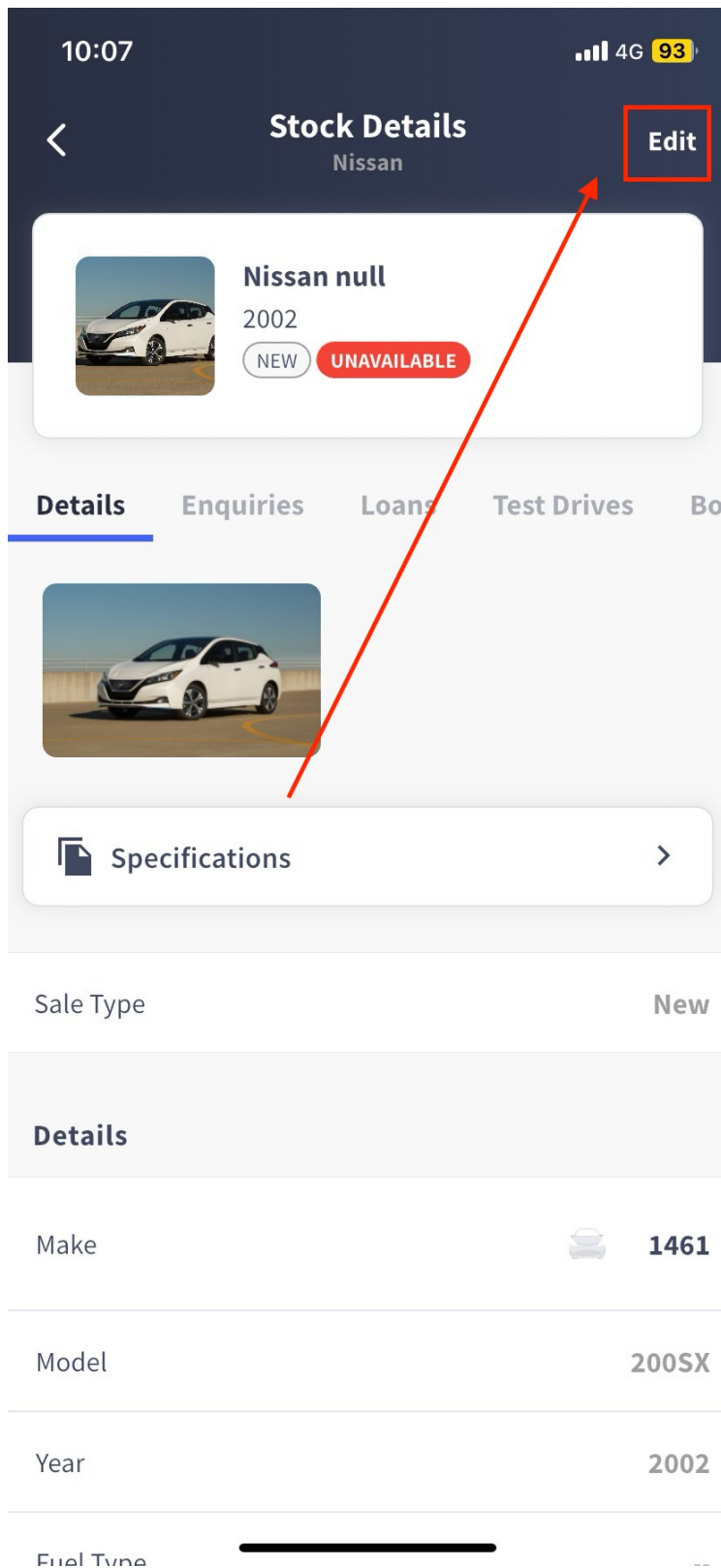
Not for Loan

NEW AVAILABLE

+

3. Enter Edit Mode:

On the "Stock Details" screen, locate and tap the "Edit" button, usually found in the top right corner. This will allow you to modify the vehicle's information.



4. Change the Status to "Available":

Scroll down the "Update Stock" screen until you find the "Status" field. Tap on the current status (e.g., "UNAVAILABLE"). A list of status options will appear, including "AVAILABLE," "WON," "DELIVERED," "IN PRODUCTION," and "UNAVAILABLE." Select "AVAILABLE" from this list.

The screenshot shows a mobile application interface for updating stock information. The title bar at the top is dark blue with a back arrow on the left, the text "Update Stock" in the center, and a "Save" button on the right. The status bar at the very top shows the time "10:07", signal strength, "4G", and battery level "93".

The main content area consists of several form fields, each with a label on the left and a value or selection on the right:

- Interior Colour: interior colour
- Odometer: 10,010
- Stock No.*: 13
- Reg No.: reg no.
- Reg State: select reg state ▼
- VIN No.: vin no.
- Trade Plate: trade plate
- Status: UNAVAILABLE ▼ (This field is highlighted with a red rectangular border)
- Stock Arrived: a toggle switch that is currently turned off
- Location: select location ▼
- Usage: select usage ▼
- Transport Method: select transport method ▼
- Build Date: build date ▼
- Registration Date: registration date ▼

10:07 4G 93

< Update Stock Save

Interior Colour	interior colour
Odometer	10,010
Stock No.*	13
Reg No.	reg no.
Reg State	select reg state ▼

Status

AVAILABLE ✓

WON

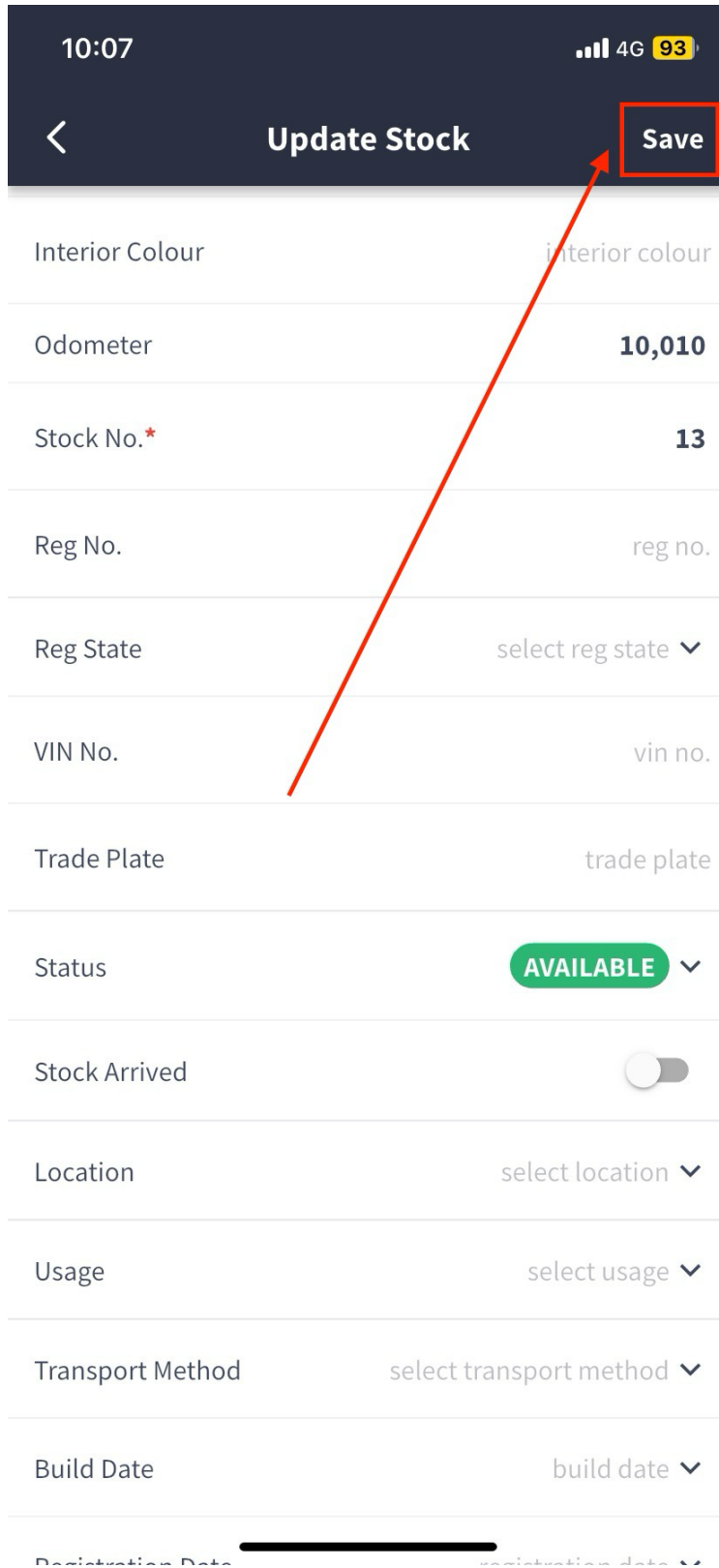
DELIVERED

IN PRODUCTION

UNAVAILABLE

5. Save the Changes:

After selecting "AVAILABLE" as the new status, tap the "Save" button in the top right corner of the "Update Stock" screen. This action will update the vehicle's status in your inventory.



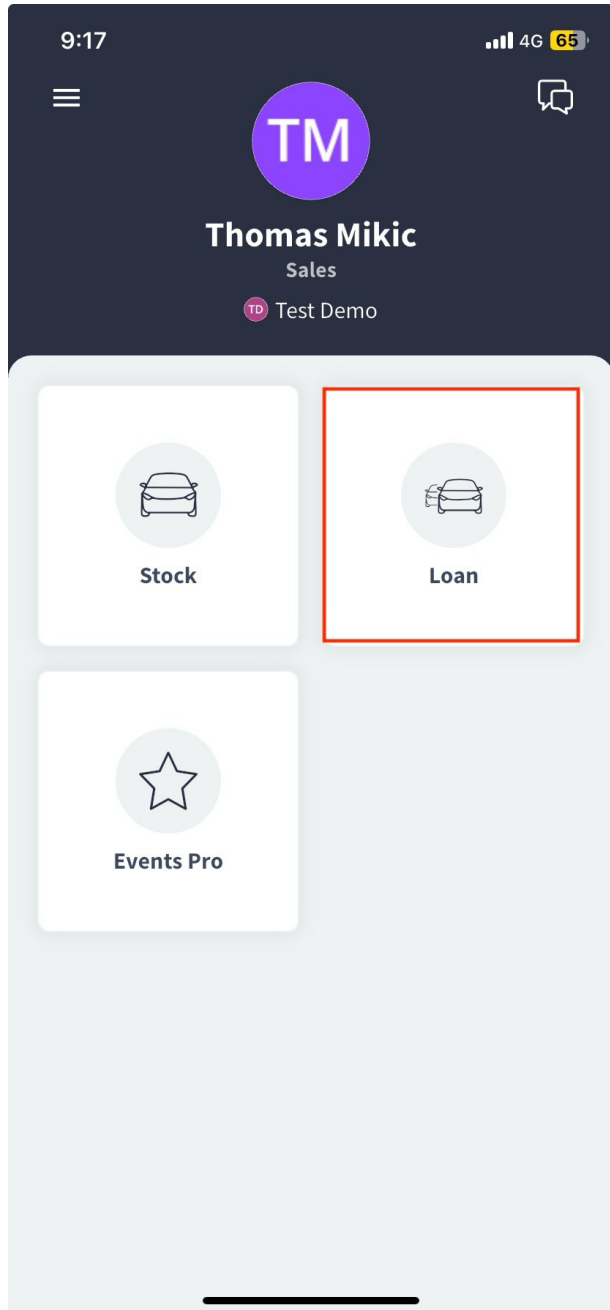
The screenshot shows the 'Update Stock' screen on a mobile device. The status is set to 'AVAILABLE'. A red box highlights the 'Save' button in the top right corner, with a red arrow pointing to it from the 'VIN No.' field. The screen displays various vehicle details and options for update.

Field	Value
Interior Colour	interior colour
Odometer	10,010
Stock No.*	13
Reg No.	reg no.
Reg State	select reg state ▼
VIN No.	vin no.
Trade Plate	trade plate
Status	AVAILABLE ▼
Stock Arrived	<input type="checkbox"/>
Location	select location ▼
Usage	select usage ▼
Transport Method	select transport method ▼
Build Date	build date ▼
Registration Date	registration date ▼

How to loan a vehicle in AMS Pro

Loaning a vehicle

Click on loan to begin




Should bring you to this page, under the available tab which is located at the top

Find the vehicle you would like to loan either by scrolling to find it manually or searching for it top right

Once found click the vehicle

9:18 4G 65

< Loan Vehicle

 **Toyota 86 GTS**
2021
Reg No.

TD Test Demo


Current Odometer Reading* 1

Trade Plate* 2

RO Number 3

Loan Type 4

Purpose of the journey? 5

 Add Customer 6

Fill out the required details

1. Current odometer reading of the loan vehicle
2. Trade Plate
3. RO number if applicable
4. Loan type
 - Service -> If the loan is going to a contact which is using this vehicle because their current main vehicle is being serviced.
 - Other -> For any other scenario

9:18

4G 65



Loan Vehicle



Toyota 86 GTS

2021

Reg No.

TD Test Demo

Current Odometer Reading* **1,400**

Trade Plate* trade plate

RO Number ro number

T Loan Type

Service ▾

Select one

Service ✓

Other

5. Click Purpose of journey and type the details for such

The screenshot shows a mobile application interface for a 'Loan Vehicle' form. The background form is dimmed and contains the following fields: 'Toyota 86 GTS' (2021, Reg No.), 'Current Odometer Reading*' (1,400), 'Trade Plate*' (trade plate), 'RO Number' (ro number), 'Loan Type' (Service), and 'Purpose of the journey?' (+). A modal titled 'Purpose of the journey' is open in the foreground, featuring a text input field with the placeholder 'purpose of the journey..' and a character count '0/280'. A blue 'Done' button is located at the bottom of the modal.

6. Click add customer, will bring up a new page for adding contacts

- Can either add existing contacts through "Search Contact at the top"
- Add a new contact but filling out the details below
- Once completed click save top right

Then new details will appear in the loan vehicle page, which include the contacts details

9:19 4G 65

✕ **Contact Info** Save

🔍 Search Contact

Search from existing contacts

+ Scan License or ID Card scan driver license

Scan license, user name, user image, license no, state, nationality and license expiry

👤 Owner **Thomas Mikic** >

📌 Contact Type **Potential Customer**

Personal Info

T Title select title ▾

👤 First Name* first name

👤 Middle Name middle name

👤 Last Name* last name


👤 Preferred Name preferred name

♂ Gender select gender ▾

📅 Date of Birth date of birth ▾

9:19 4G 64

< Loan Vehicle >



Toyota 86 GTS
2021
Reg No.

TD Test Demo

Current Odometer Reading* **1,400**

Trade Plate* trade plate

RO Number ro number

T Loan Type **Service** v

Message Purpose of the journey? +

Customer Details ✓

Name **Aaminah Sims**

License No. **87874545**

Phone **+61 045 512 3321**

Before Loan

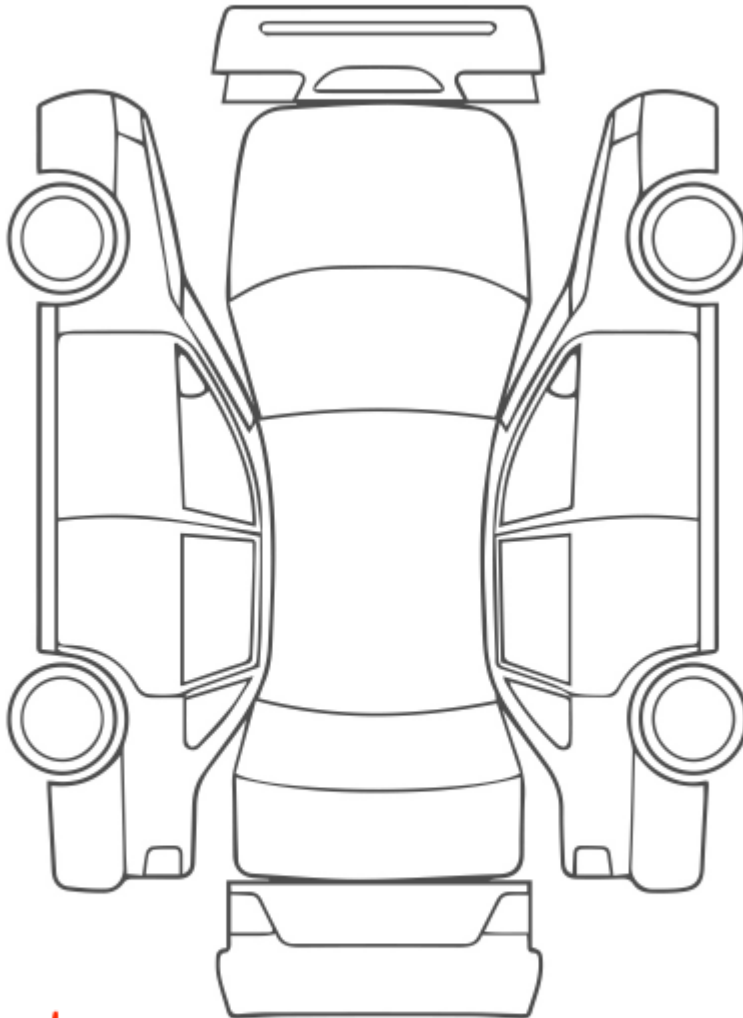
Car Vehicle Inspection +

Fuel/Battery Start Fuel/Battery Level **Empty**

Loan Vehicle

Now there are new details to complete, lick "Vehicle Inspection" -> If there is any damage such as a scratch, rust, dent or a crack, etc on the car before the loan.

1. Select the type of inspection, info, scratch, etc. Then click the area of the car in which the fault is.
2. If you need to get rid of all the added inspections, click "Clear" to do so.
3. Once completed click "Done" to finalise



Once done the menu will appear below.

1. You can upload an image of the damage by clicking the Image icon.
2. Change the mark type, scratch, etc.
3. Add notes if applicable
4. Delete the damage by click "Delete"

5. Then save it by clicking "Save"

If needed you can go back into inspection to add more damage types and information.

Info Add notes & images to mark

1

Mark Type

Info

Notes

2

3




Delete 4

5 Save

Next click "Terms & Conditions"

Choose an option for the contact

Choose Option

-  **Send sign request**
Send signature request to customer
-  **Sign on-sight**
Get signature on-site from customer
-  **Cancel**
Do nothing

- Send sign requests -> Sends a request to the contact for them to sign via email, waits for the contact to send the signature back.
- Sign on-sight -> Get signature on-site from customer -> Opens a window for the contact to sign, in person. Requires the contact to draw within the form. To put the signature in, press "I Agree" and the window will pop up. Draw the signature and then click "Done". Then click "I Agree"
- Cancel -> Closes the window and takes you back. However the signature is required for a loan.

Similarly, when clicking "Insurance Waiver" repeat the same process as the "Terms & Conditions".

Next choose the "Start Date", "Start Time", "Expected Return Date" and the "Expected Return Time".

Each date field will open a calendar, select the appropriate data for the loan start date and expected return date.

You **cannot** backdate a test drive

For each time field, when you select it a time window pop up will open, allowing you to select the appropriate start time of the loan and expected return time.

Next you need to select the fuel level of the car before being loaned,

To do so drag the grey circle above the "E" to the appropriate fuel level.

Start Date Start Time

03/06/2025 1:01 PM

Before Fuel / Battery Level



Once all fields have been completed you can click "Loan Vehicle" at the bottom.

Once completed the vehicle will not longer be available on the loan vehicle available page

Returning a loaned vehicle

In the loaned vehicle tab on the dashboard find the vehicle you want to return. Similar to before when finding the correct vehicle to loan.

Click on the vehicle to return.

If needed you can click report at the top to generate a report of the loan and download the file.

Next fill out the details in the after loan section

1. Time duration
2. Vehicle Inspection
3. Vehicle inspection check -> if there is any damage click this
4. End fuel level
5. Notes
6. Signature
7. Once done click return vehicle at the bottom.

For each of these details please refer to earlier if unsure.

9:51 4G 60

< Loan Vehicle >

After Loan

🕒 Time Duration 1 +
End Time end time
End Odometer Reading 0

🚗 Vehicle Inspection 2 +

Damaged Vehicle 3

🛢 End Fuel/Battery Level 4 Empty
E 1/2 F

💬 Notes 5 +

✍ Signature* 6 +

↩ RETURN VEHICLE 7

Once completed the vehicle will no longer be under the loaned tab but back under the available tab.

9:18

4G 65



AVAILABLE

LOANED

MY LOANED



On Service Loan Only



Toyota 86 GTS

2021

AVAILABLE

Stock No. Reg No. VIN No.
156 -- --



Nissan Leaf SL Plus

2022

AVAILABLE

Stock No. Reg No. VIN No.
13 -- --

