

# AMS Pro User Guide



**LSH AUTO AUSTRALIA**



Author  
Department  
Version Date

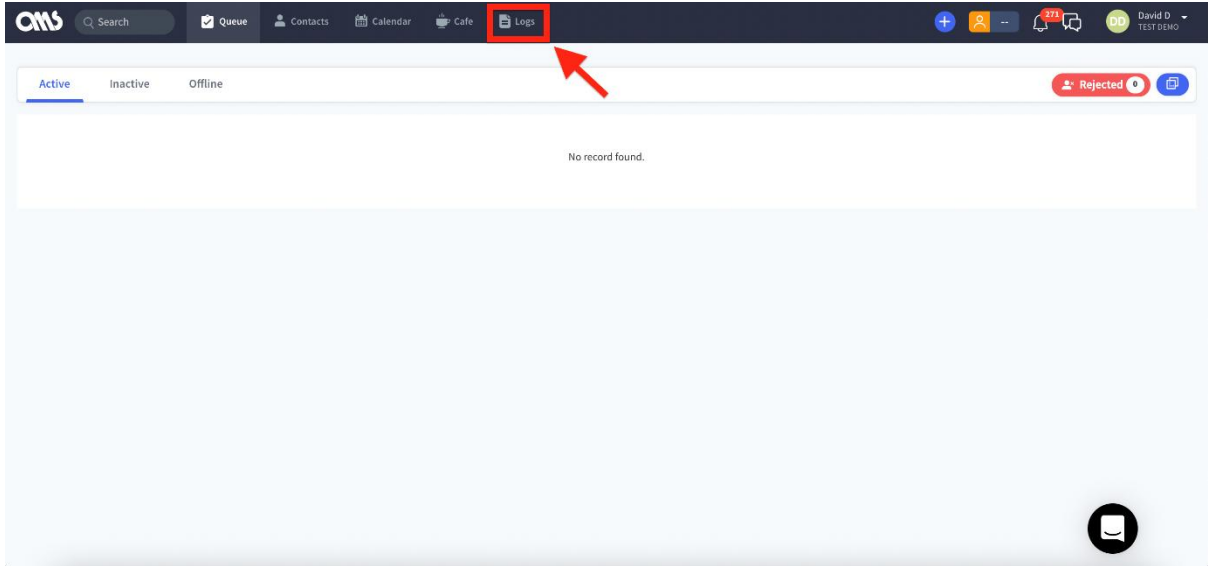
Yusuf Zarani  
IT  
2025.05.22

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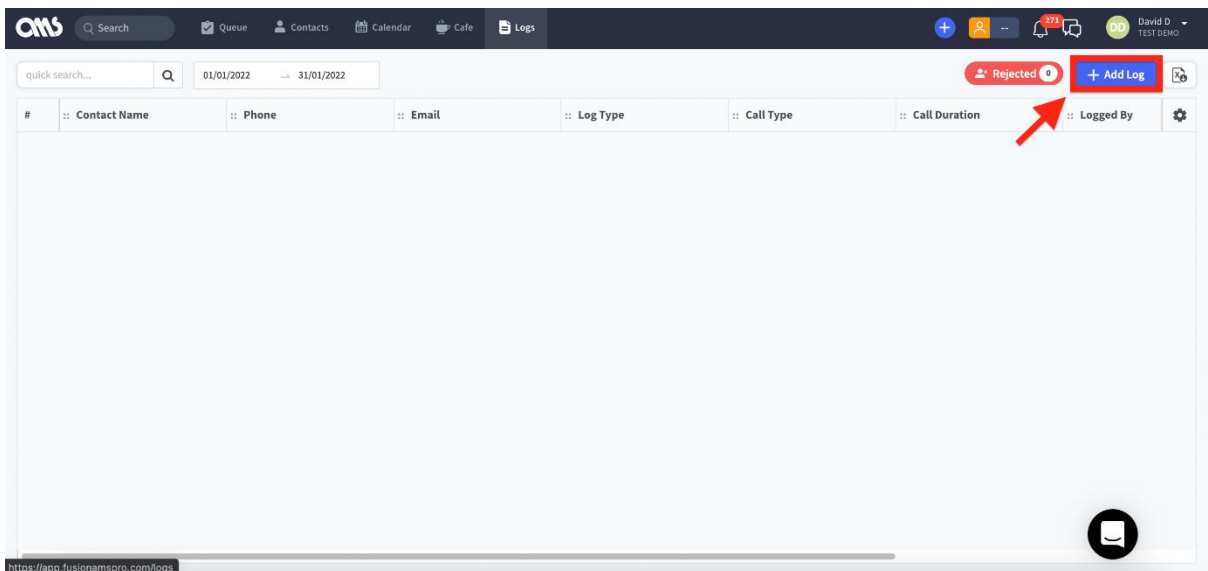
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# Front Desk

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 the CMS interface. 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 the CMS interface. 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 shows 'Mr John Doe' with contact details. The dialog includes fields for Make, Group, Type, Model, Year, and Sale Type.

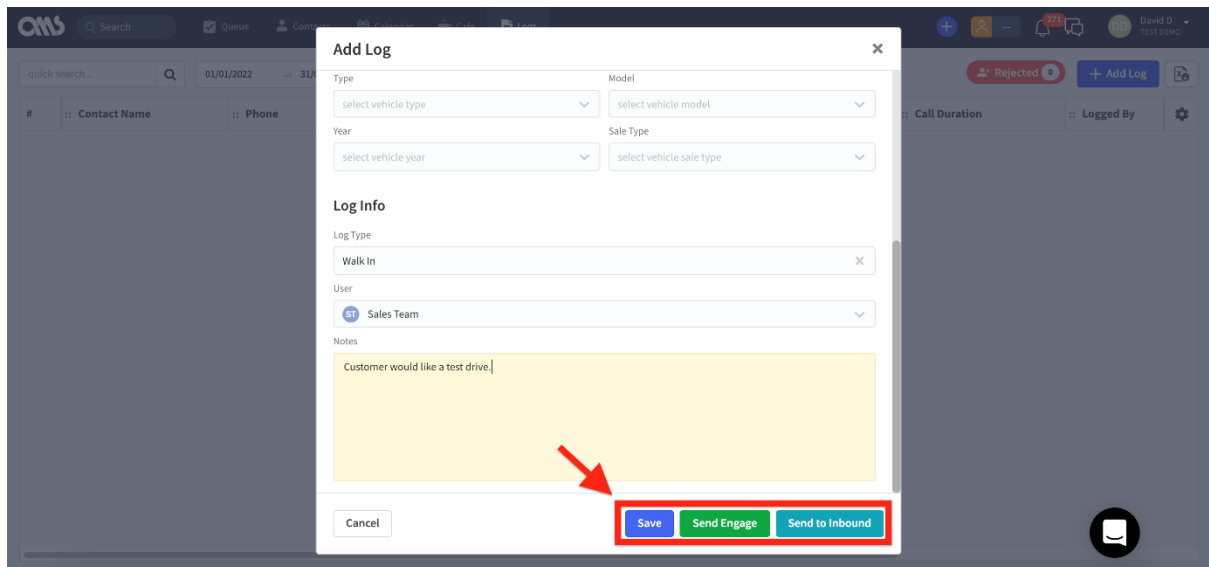
5. Now click on **Log Type** in the drop-down menu and select whether the enquiry type.

The screenshot shows the 'Add Log' dialog box in the AMS Pro system. The 'Log Info' section is highlighted with a red box, and a red arrow points to the 'Log Type' dropdown menu. The dropdown menu is open, showing options: 'Select...', 'Call', 'Internet', and 'Walk In'.

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' dialog box in the AMS Pro system. The 'Notes' section is highlighted with a red box, and a red arrow points to the text 'Customer would like a test drive.'

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.

AMS Queue Contacts Calendar Cafe Logs

quick search... 01/01/2022 - 31/01/2022 Rejected + Add Log

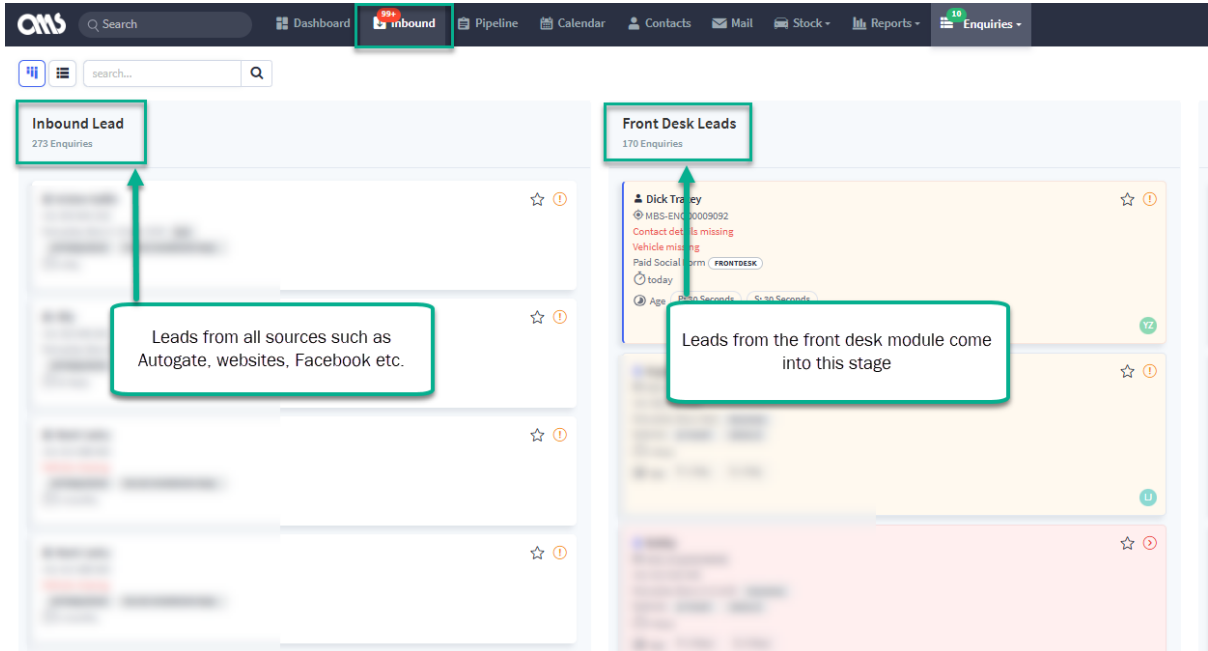
#	Contact Name	Phone	Email	Log Type	Call Type	Call Duration	Logged By
1	John Doe (John)	+61 040 000 0000	john.doe0021@hotmail.com	Walk In			David D 11/01/2022 12:55 PM

# Inbound & Pipelines

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

## Inbound

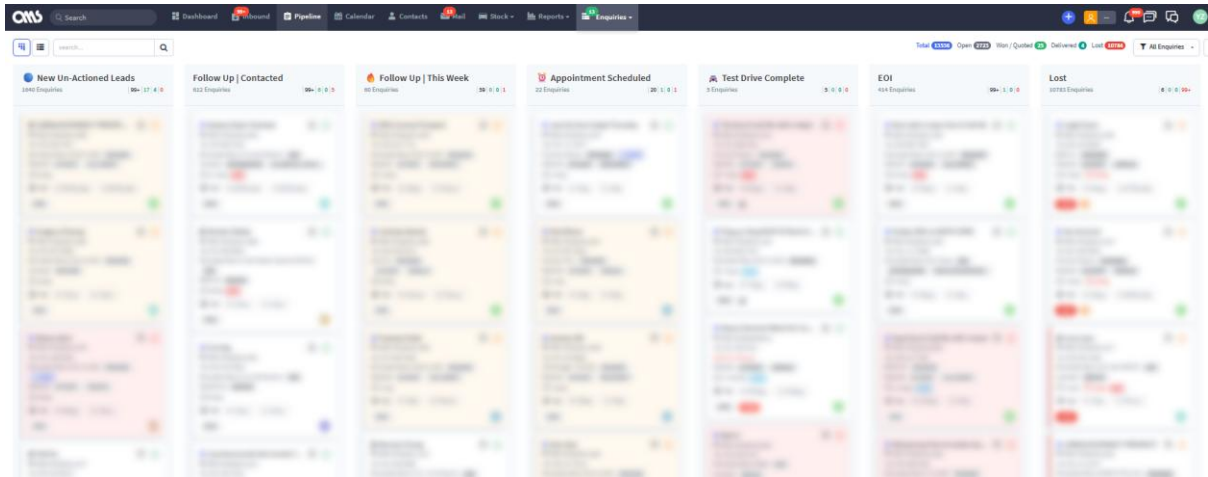
The Inbound section comprises of the inbound leads and front desk leads.



## Pipelines

### Qualified

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



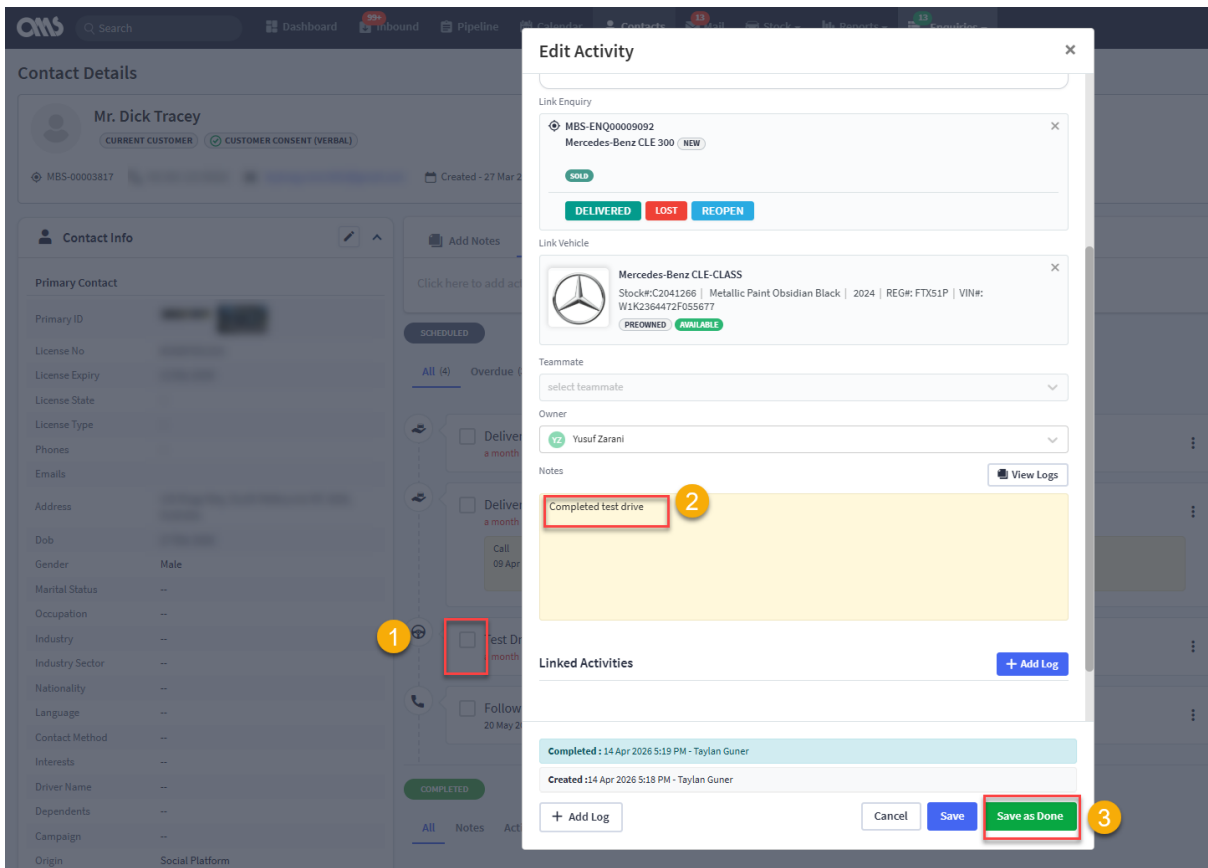
The customer journey starts with the “Unallocated Leads” stage, is where all the to be qualified leads that are allocated to the salesperson for qualification.

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

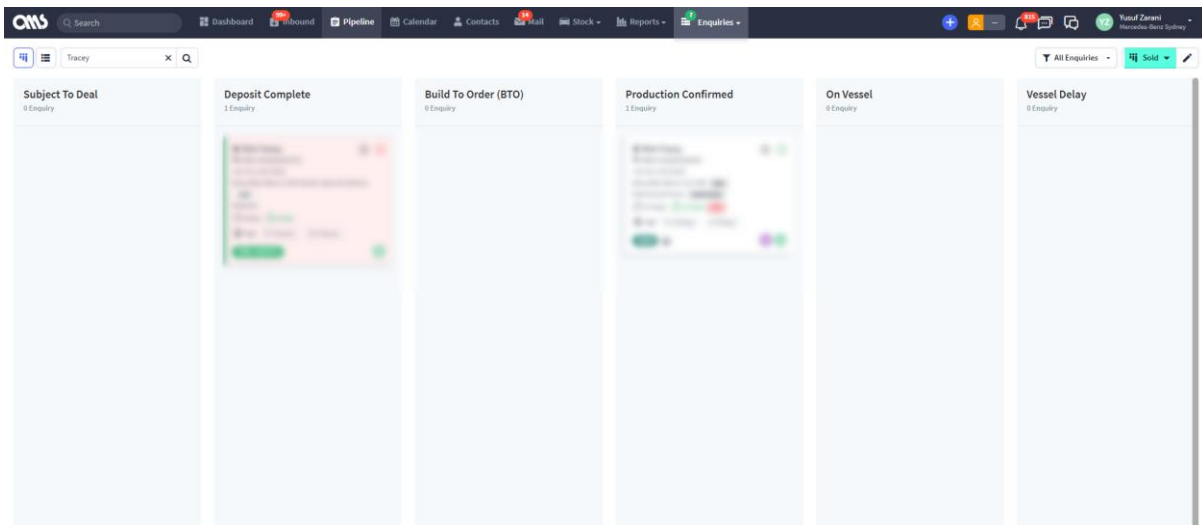
When a customer has completed the purchase and the enquiry has been marked to [Completing](#) a test drive

When a customer has completed test drive, click on the tick box, next to the Test Drive > then enter notes and click on “Save as done”. (Trigger Communications: Follow Up Calls, Days 1 – 7, Appointment Booking-7days After Test Drive SMS, Appointment Booking-After Appointment/Test Drive Follow Up EDM)



You will need to schedule the next activity on saving above.

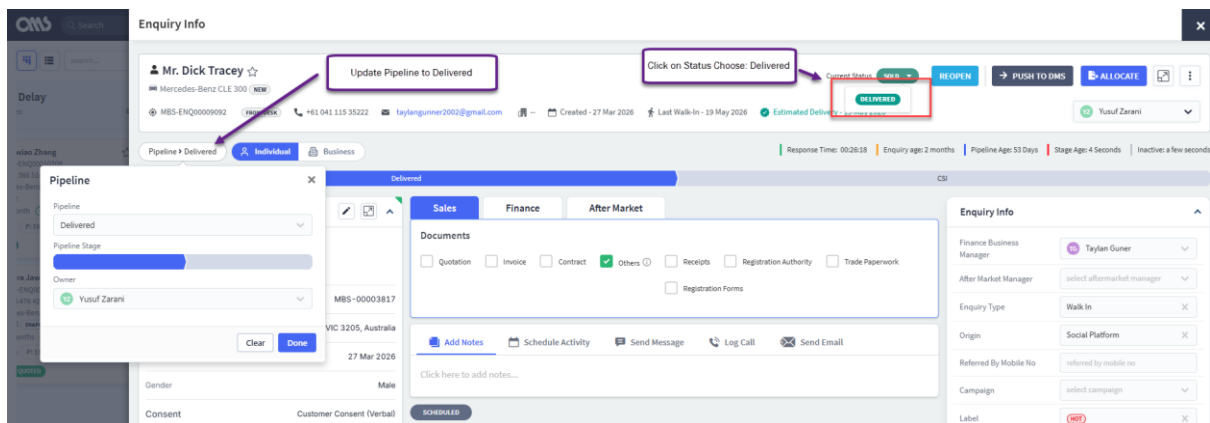
Sold the entry will move to the sold pipeline. Please move the enquiry across the stages as the status changes for automated



### Delivered

When a vehicle has been marked as Delivered ( [Delivery: Change Status](#) )

When a vehicle has been delivered, we need to change the status to “Delivered” and move the entry into the “Delivered Pipeline”. Along with this it is imperative that the delivery date is updated as per the next step.



Delivery: How To Update 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	 Taylan Guner	▼
After Market Manager	select aftermarket manager	▼
Enquiry Type	Walk In	✕
Origin	Paid Social Form	✕
Campaign	select campaign	▼
Label	<b>HOT</b>	✕

## Adding a vehicle to the enquiry

When you are in the enquiry for the customer,

The screenshot shows the 'Requirement' form in a CRM system. The form is titled 'Requirement' and is used to add a vehicle to an enquiry. The background shows the 'Enquiry Info' for a customer named 'Dick Tracey'.

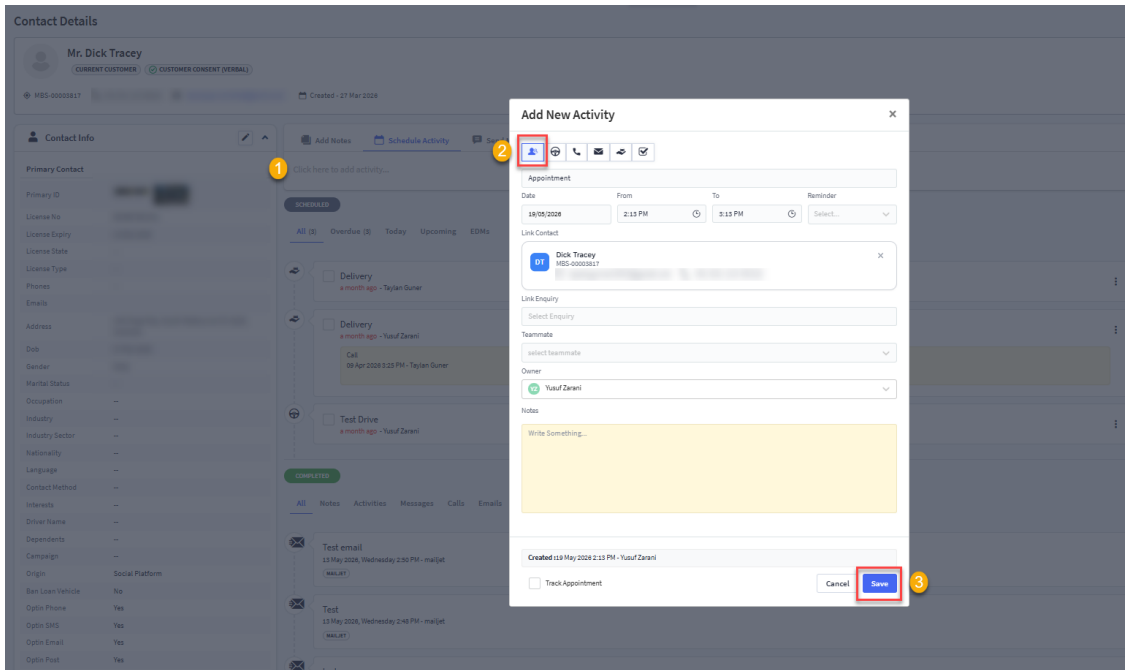
Key elements of the form include:

- Requirement**: A dropdown menu with options 'Model' and 'Stock'. A callout box with a '2' points to this menu, containing the text: 'Choose Model for new vehicles / Stock to search for a vehicle, either New or Used'.
- Vehicle Sale Type**: A dropdown menu with options 'New' and 'Used'. A callout box with a '1' points to the '+' icon next to this menu, containing the text: 'Click on +'.
- Vehicle Information**: A form with various fields for vehicle details:
  - Make**: Mercedes-Benz
  - Group**: CLE
  - Type**: Coupe
  - Model**: CLE 300 Coupe
  - Year**: 2025
  - Exterior Colour**: exterior colour
  - Interior Colour / Trim**: interior colour
  - Warranty Start Date**: DD/MM/YYYY
  - Warranty Expiry**: DD/MM/YYYY
  - Stock Number**: stock no
  - VIN Number**: vin no
  - Reg. Number**: reg no
  - Registration Date**: DD/MM/YYYY
  - Transmission**: select transmission
  - Price**: \$
- Quantity**: A numeric input field with a value of '1' and '+' and '-' buttons.
- Other Info**: A section with toggle switches for 'Safety', 'Appearance', 'Comfort', and 'Warranty'.
- Buttons**: 'Cancel' and 'Save' buttons at the bottom. A callout box with a '3' points to the 'Save' button.

# Appointments

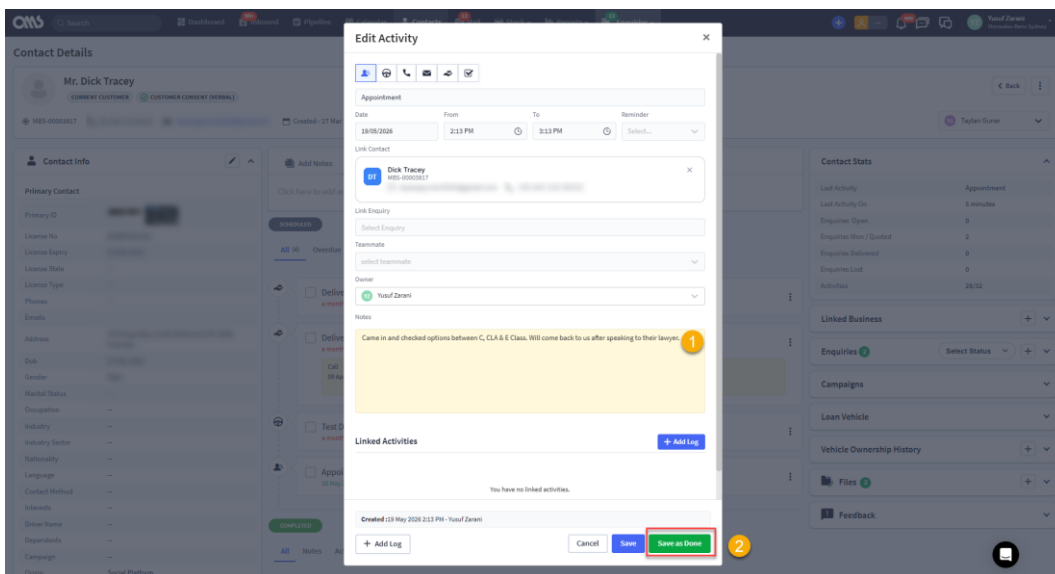
## Creating an appointment

To create an appointment in the enquiry, click on the middle section and choose Appointment and hit save.



## Completing an appointment

Click into the appointment and then make your notes and click on Save As Done. This will trigger an automated email thanking the customer for their visit.



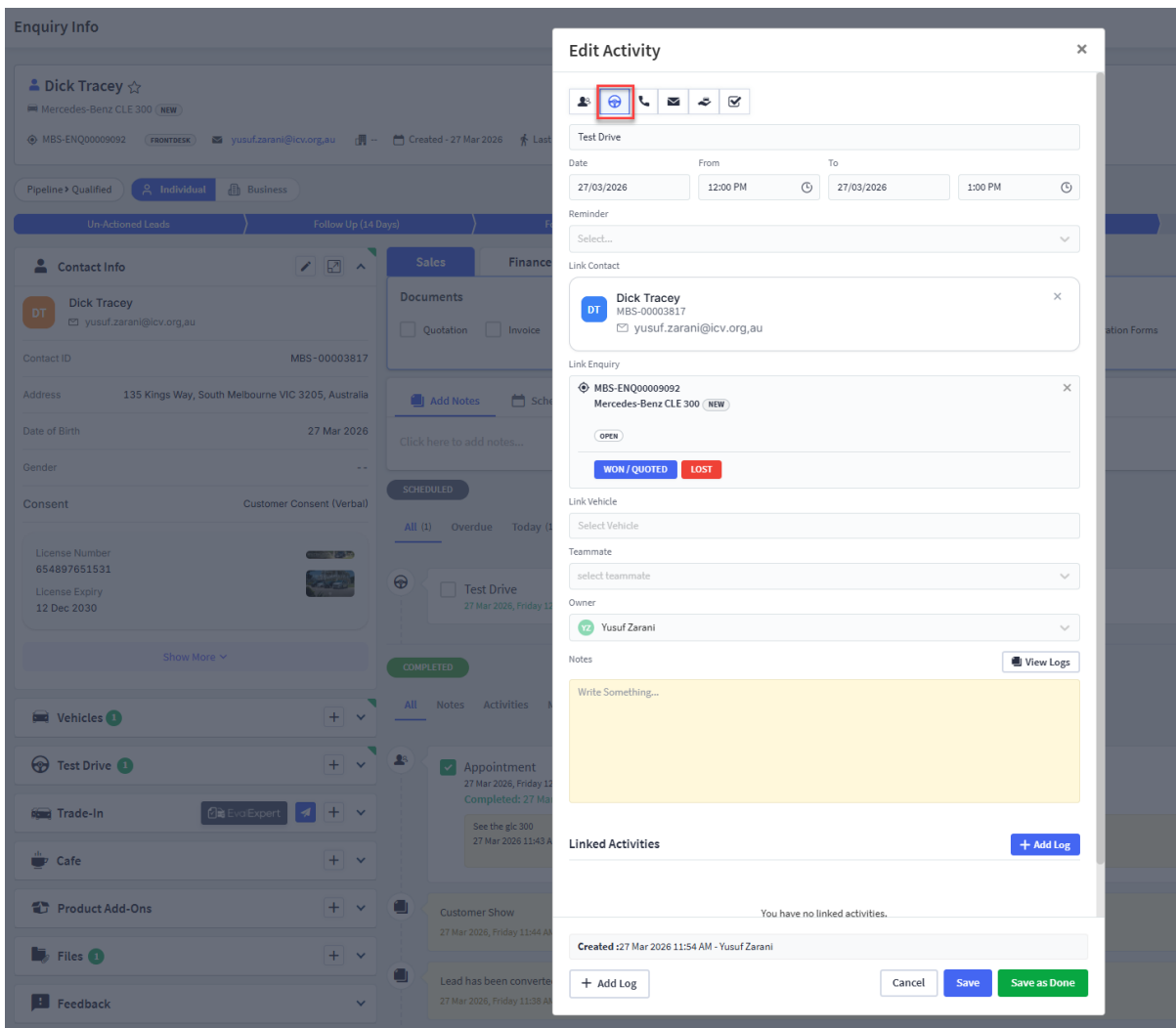
You would then need to schedule the next activity that is relevant to the customer.

# 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. (Trigger Communication: Appointment Booking-Test Drive Confirmation email, Appointment Booking-1 day before test drive SMS, )

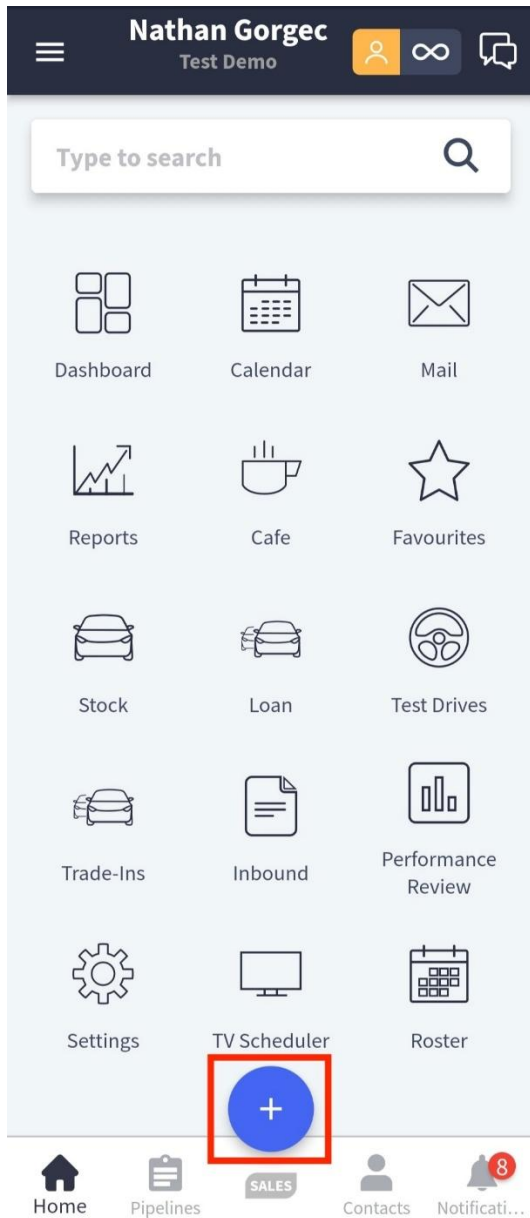
Enquiry > Schedule Activity > Choose the Wheel for Test Drive



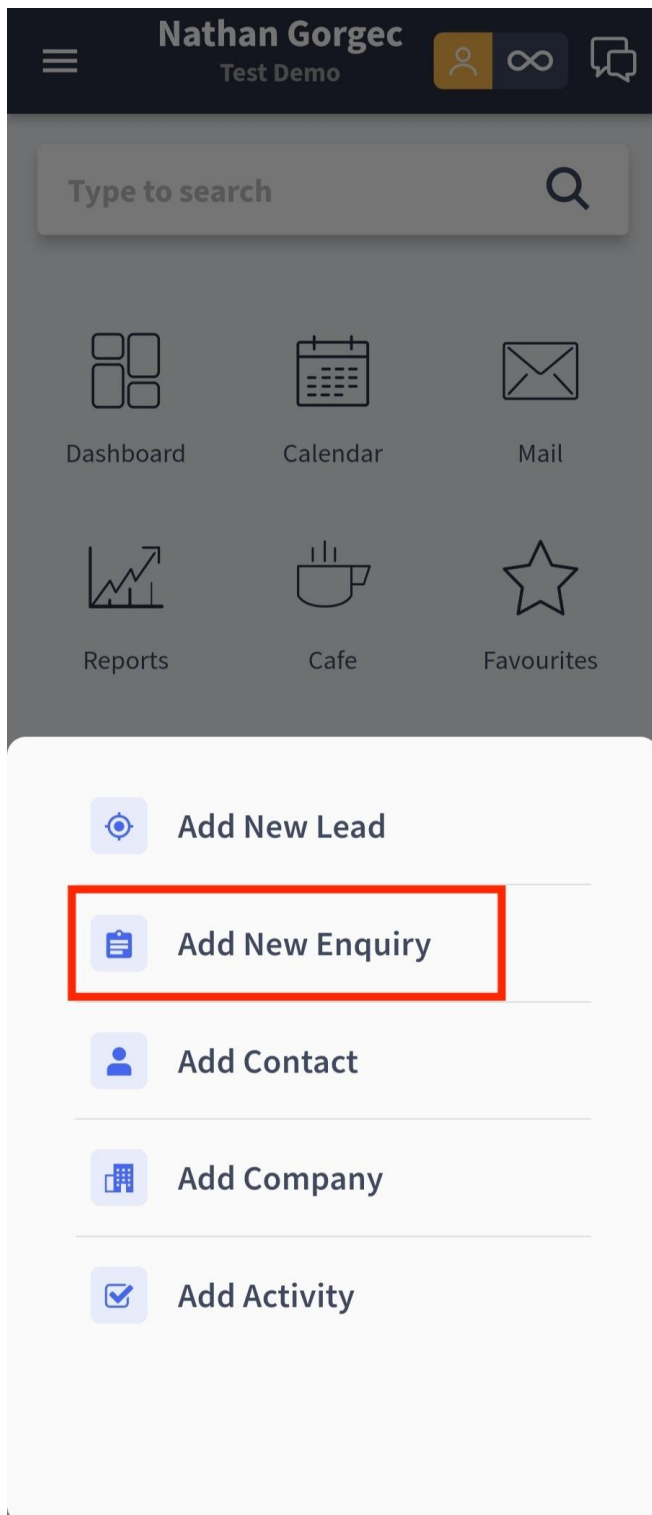
## How to do a test drive in AMS Pro App (Mobile)

### 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** ▾

---

 <b>CONTACT INFO</b>	 VEHICLE	 TRADE-IN	 TEST DRIVE
 CAFE	 FILES	 NOTES	 EVENTS PRO
 PRODUCTS			

---

Next Activity   Select date ▾

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





**Appointment**

---

Enquiry Type   Select one ▾

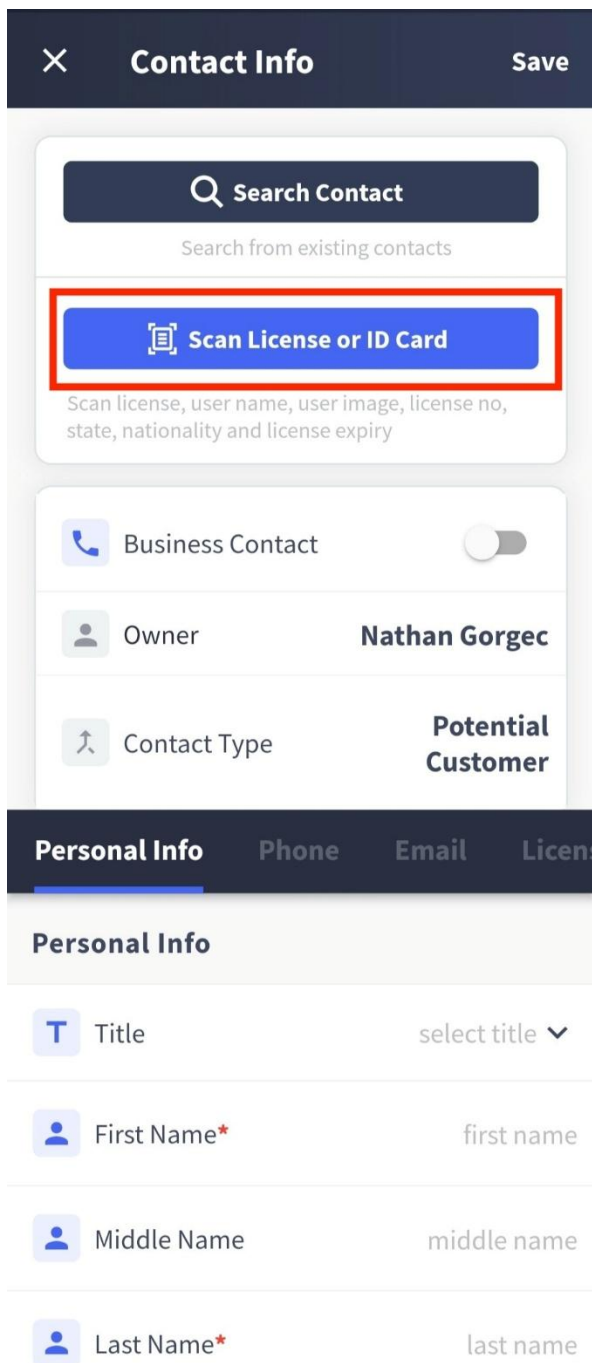
---

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** ▾

- 
- 
- 
- 
- 
- 

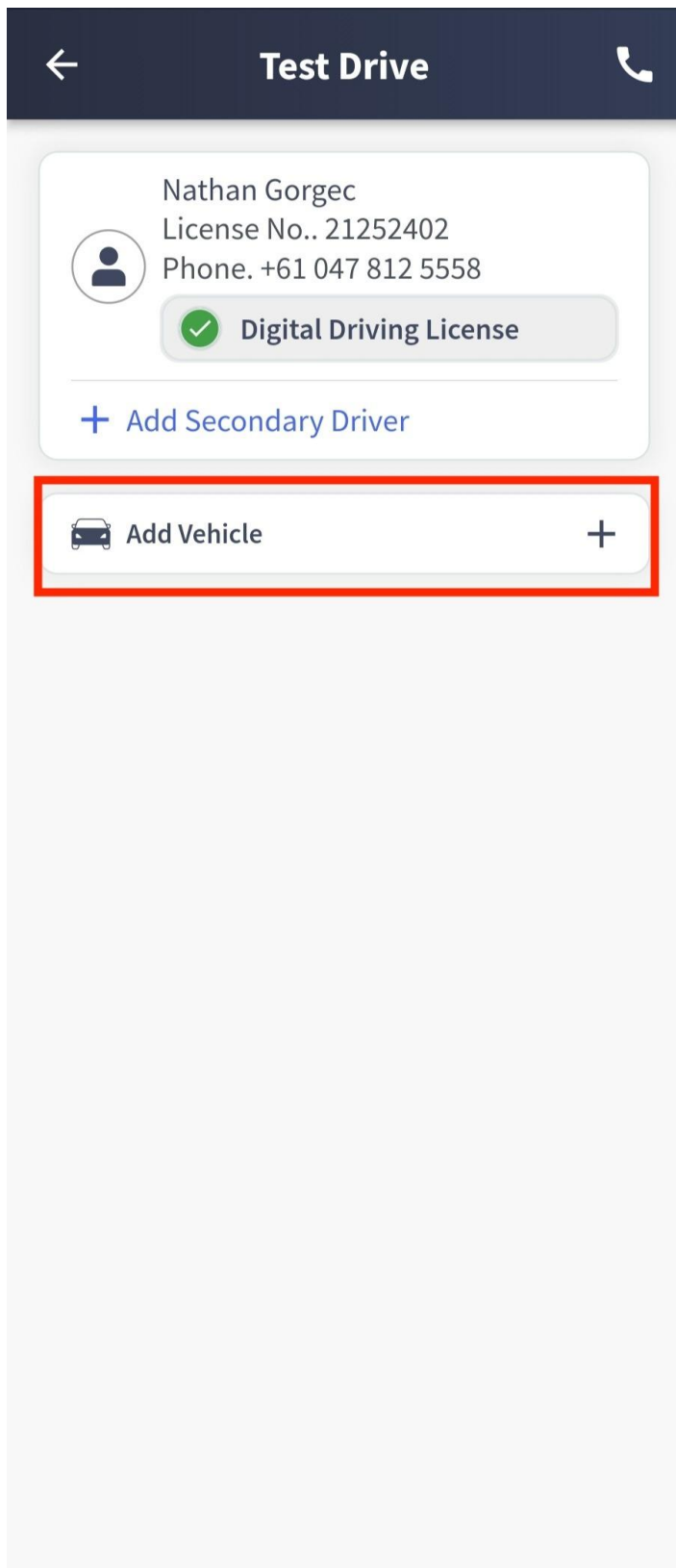
**Appointment**

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.


 Test Demo


Current Odometer Reading\* **6,015**

Trade Plate\* trade plate

**Before Test Drive**

 Vehicle Inspection +

 Terms & Conditions\* +

 Insurance Waiver +

Car Handover

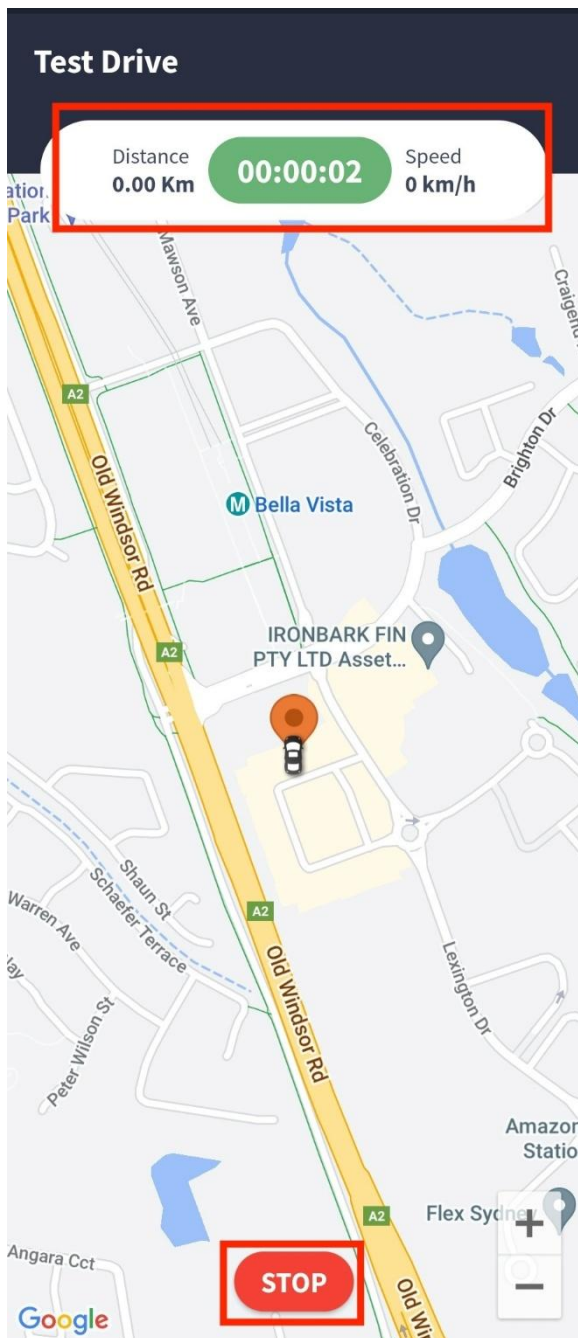
**Notes**

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.

← **Test Drive** ☎

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

★ ★ ★ ★ ★

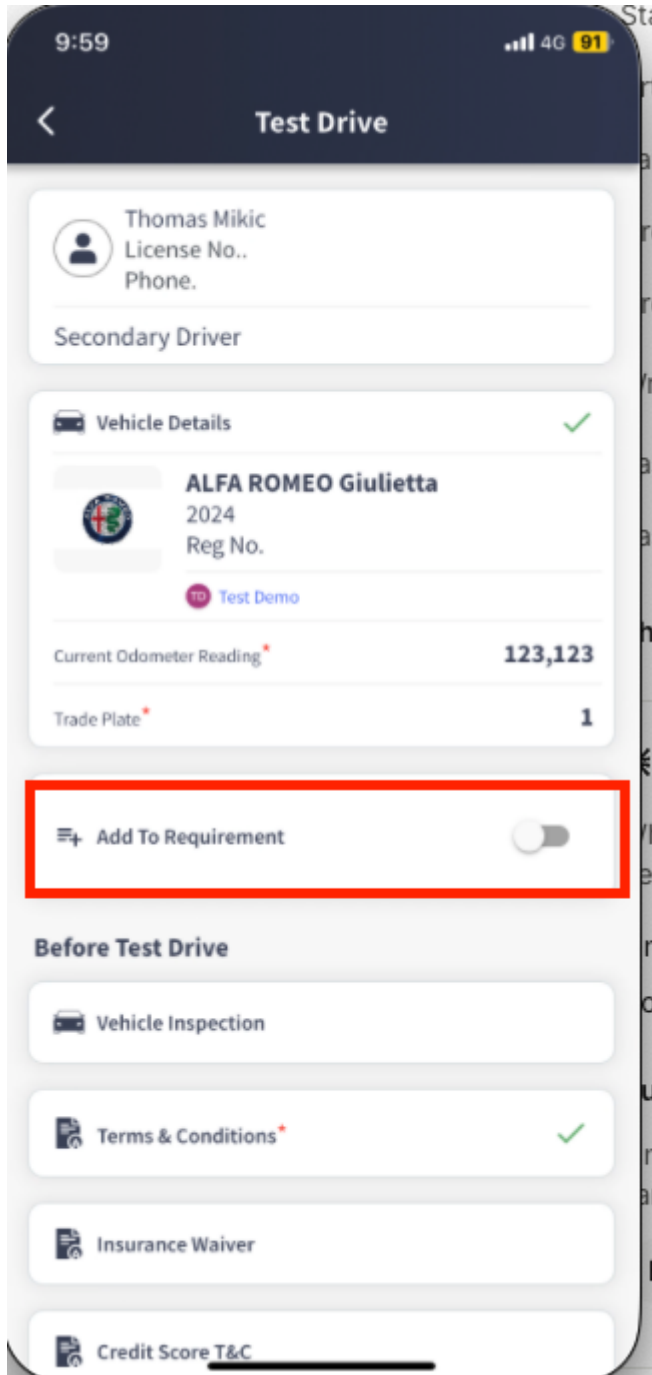
**Notes**

write your notes here

**FINISH**

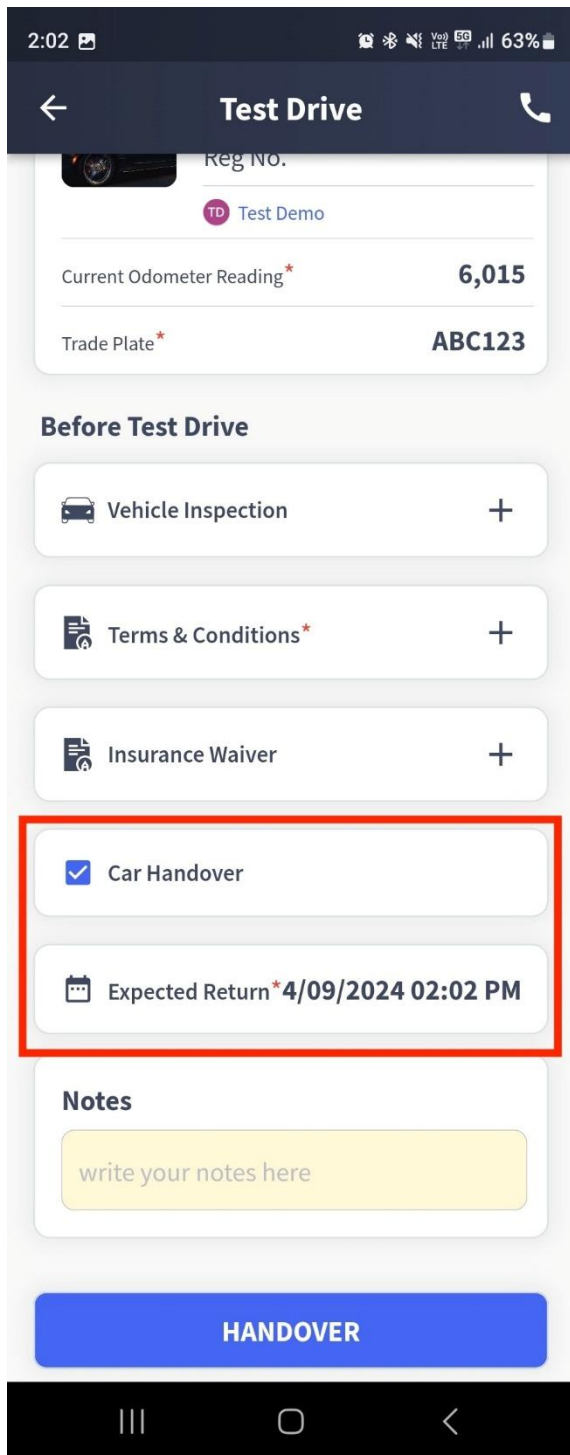
**\*\*\* NOTE \*\*\***

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 ▼



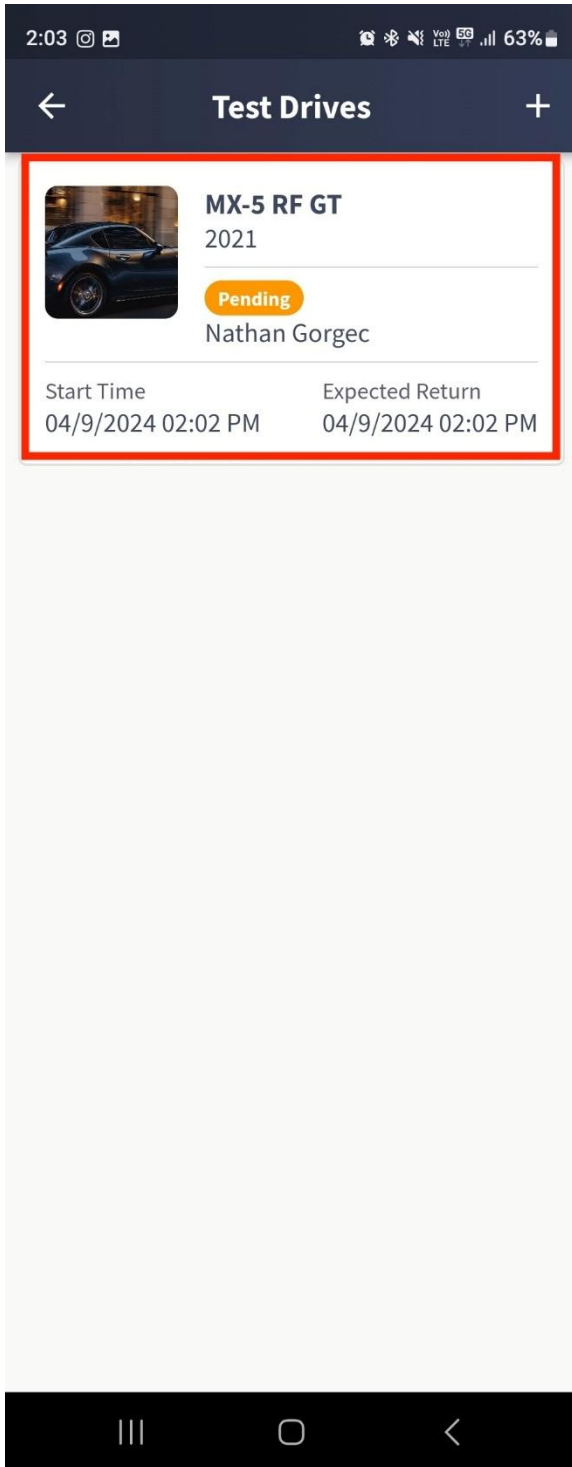






**Campaign**   Select one ▼

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.

2:03 [status icons] 63%

← **Test Drive** [phone icon]

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' form in the AMS Pro App. The form is divided into several sections:

- Header:** 'Add New Enquiry' with 'Save' and 'Delete' buttons.
- Pipeline:** 'Pipeline > New' with a progress bar showing stages: Un-Actioned Leads, Contacted, Appointment Scheduled, Test Drive Completed, Proposal, Won, Delivered, and Lost. Timers for each stage are shown.
- Left Sidebar:** A list of sections: Contact Info, Vehicles (1), Test Drive, Trade-In, Cafe, Finance, Files, Events Pro, and Feedback. The 'Test Drive' section is expanded, showing 'No test drive info' and a '+ Add' button with a red arrow pointing to it.
- Main Content Area:** A 'Sales' tab is active. It contains a 'Documents' section with checkboxes for Quotation, Invoice, Contract, and Others. Below this are buttons for 'Add Notes', 'Schedule Activity', 'Send Message', 'Log Call', and 'Send Email'. A note field is present with the text 'Click here to add notes...'. Below the note field is a 'SCHEDULED' section with a '+ Schedule an activity' button and the text 'You have no scheduled activities.' At the bottom of the main content area is a 'COMPLETED' section with a list of tabs: All, Notes, Activities, Messages, Calls, Emails, EDMs, and Change Logs.
- Right Sidebar:** An 'Enquiry Info' section with various fields: Finance Business Manager (select business manage), Enquiry Type (Walk In), Origin (In-Person Prospect), Campaign (select campaign), Label (select label), Purchase Intention (set purchase intention), Estimated Delivery Date (DD/MM/YYYY), Deposit Amount (\$), Deposit Receipt Number (deposit receipt number), Gross Amount (\$), Sales Contract Number (sales contract number), and Lead Source (select lead source).

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

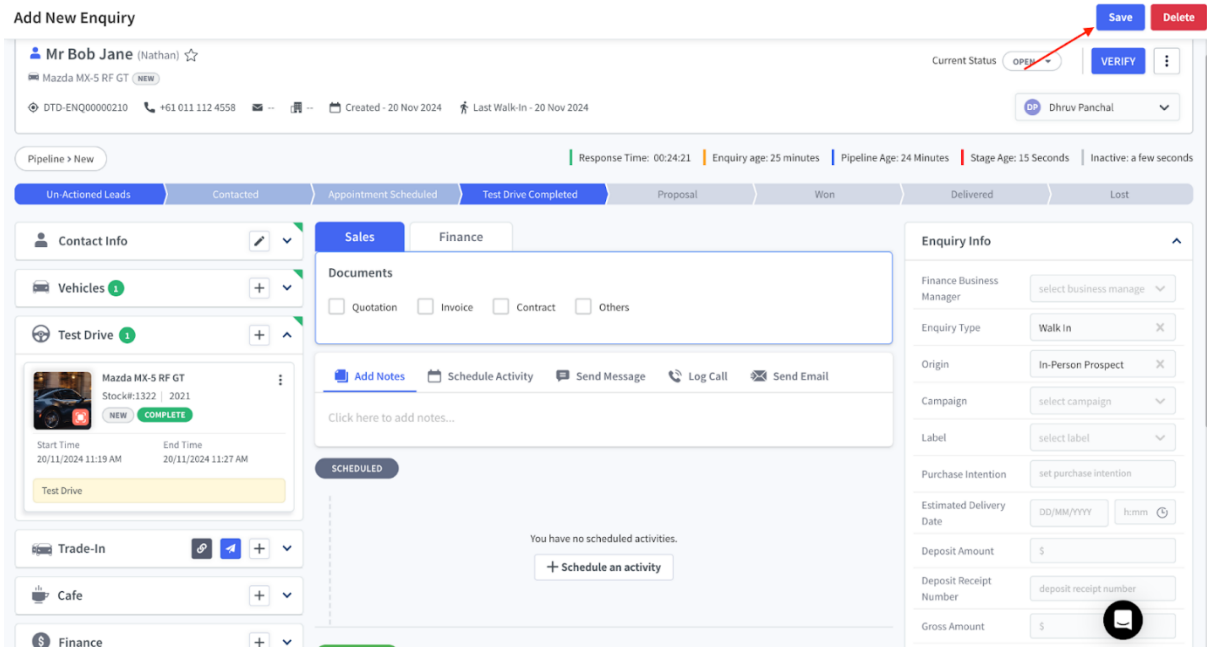
#### After Test Drive

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

#### Notes

Write Something...

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.



## Completing a test drive

When a customer has completed test drive, click on the tick box, next to the Test Drive > then enter notes and click on “Save as done”. (Trigger Communications: Follow Up Calls, Days 1 – 7, Appointment Booking-7days After Test Drive SMS, Appointment Booking-After Appointment/Test Drive Follow Up EDM)

The screenshot displays the 'Edit Activity' modal in the AMS Pro system. The modal is overlaid on the 'Contact Details' page for Mr. Dick Tracey. The modal contains the following sections:

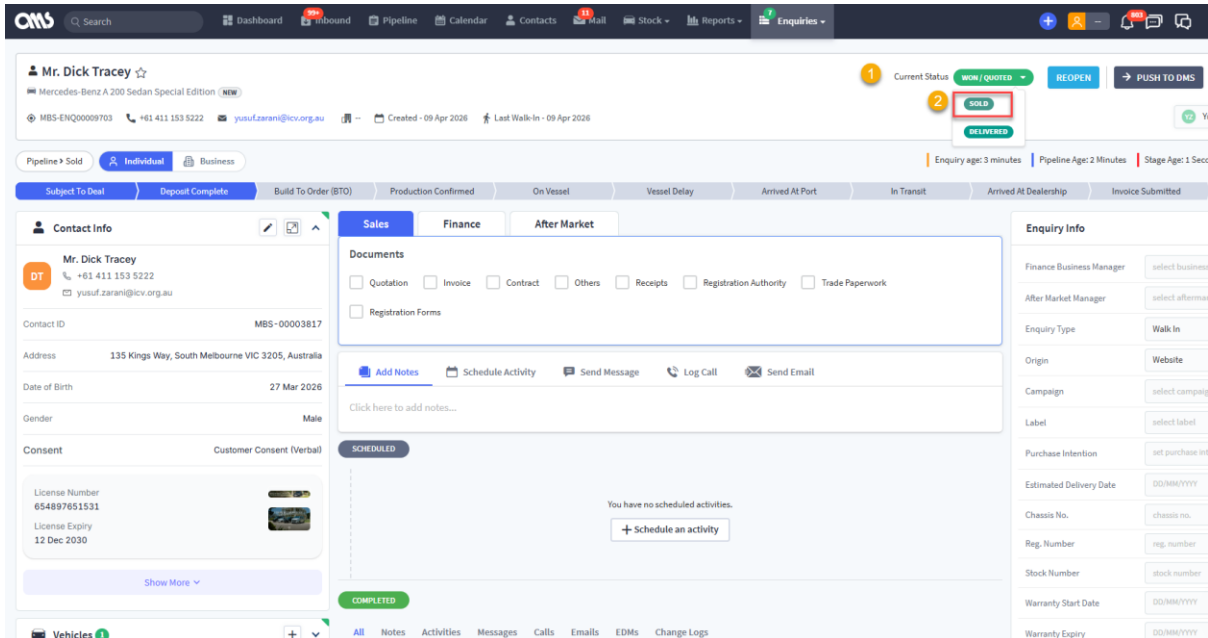
- Link Enquiry:** MBS-ENQ00009092, Mercedes-Benz CLE 300 (NEW), SOLD status.
- Link Vehicle:** Mercedes-Benz CLE-CLASS, Stock#: C2041266, Metallic Paint Obsidian Black, 2024, REG#: FTX51P, VIN#: W1KZ364472F055677, PREOWNED/AVAILABLE status.
- Teammate:** select teammate (dropdown).
- Owner:** Yusuf Zarani (dropdown).
- Notes:** A text area containing 'Completed test drive' (highlighted with a red box and a yellow circle with the number 2).
- Linked Activities:** A list of activities with 'Completed' and 'Created' entries from 14 Apr 2026 5:19 PM - Taylan Guner.
- Buttons:** '+ Add Log', 'Cancel', 'Save', and 'Save as Done' (highlighted with a red box and a yellow circle with the number 3).

In the background, the 'Contact Details' page shows a 'Test Drive' checkbox (highlighted with a red box and a yellow circle with the number 1) and a 'COMPLETED' status indicator.

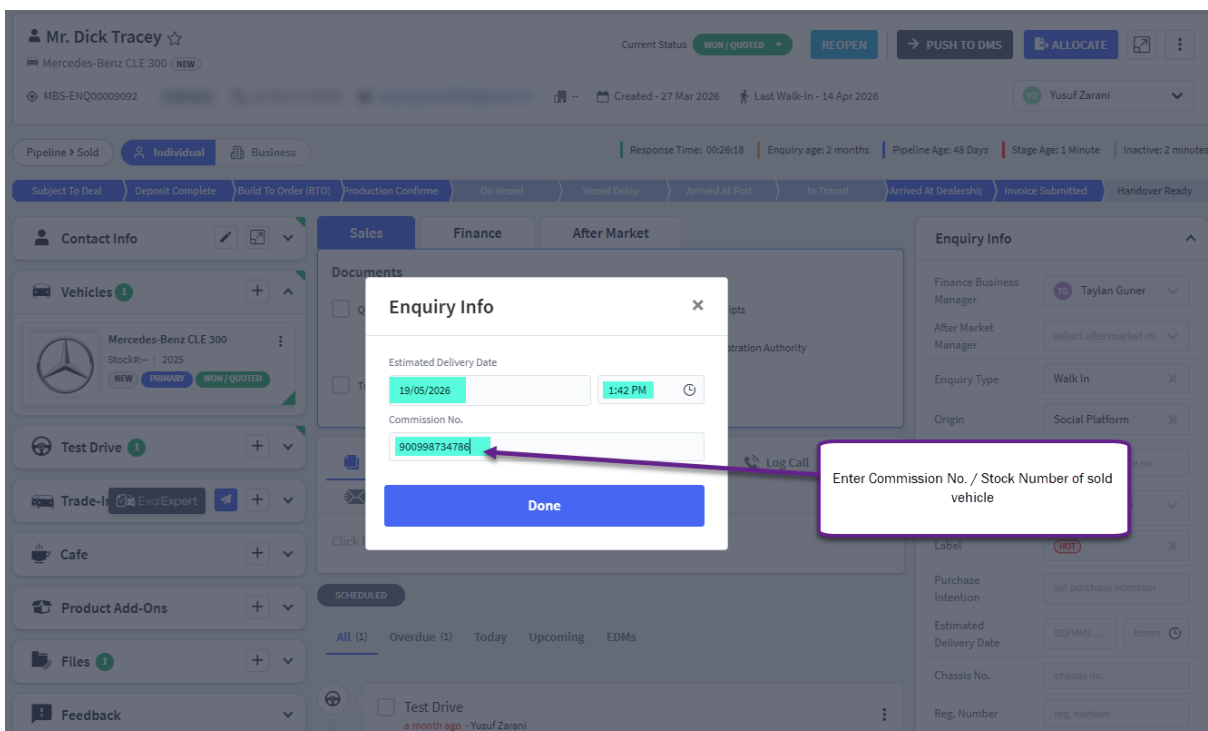
You will need to schedule the next activity on saving above.

# 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 commission number/stock#.



## Sold: Handover Ready

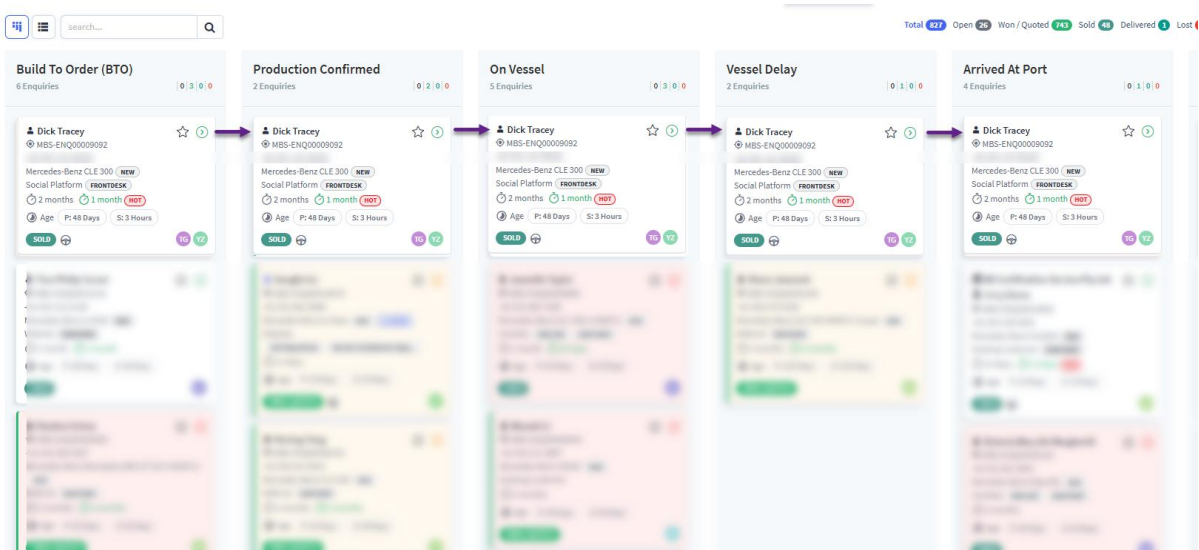
In the sold pipeline once a vehicle is Handover Ready as per STS, please move the entry from Subject To Deal into “Handover Ready” stage. (Trigger Communication: Purchase-Handover Ready EDM)

The screenshot displays a CRM interface with a top navigation bar for user Yusuf Zarani (Mercedes-Benz Sydney) and a notification count of 1000. Below the navigation, a summary bar shows 'Total 827' and 'Open 26'. A callout box with a purple border contains the text: "Once the deposit is completed, we would need to move the entry from Subject To Deal into Deposit Complete".

The main pipeline view is divided into two columns: "Invoice Submitted" (11 Enquiries) and "Handover Ready" (27 Enquiries). A red box highlights the "Invoice Submitted" column header. A purple arrow points from a card in the "Invoice Submitted" column to a corresponding card in the "Handover Ready" column. Both cards represent a vehicle listing for "Dick Tracey" (MBS-ENQ00009092), a Mercedes-Benz CLE 300, with a "NEW" badge, "FRONTDESK" social platform, and "HOT" status. The cards also show a 2-month timer, a 1-month timer, and an age of 48 days with 3 hours remaining. Both cards are marked as "SOLD" and have user initials "TG" and "YZ".

## Sold: BTO

When a vehicle is Build To Order, it is imperative that we move the entry across the stages, so that the customer gets notified via automated emails about status of their Build To Order. [Trigger Communications: Purchase (Build To Order) – Production Confirmed EDM, Purchase (Build To Order) – Vessel Delay, Purchase (Build To Order) – Arrival At Port]

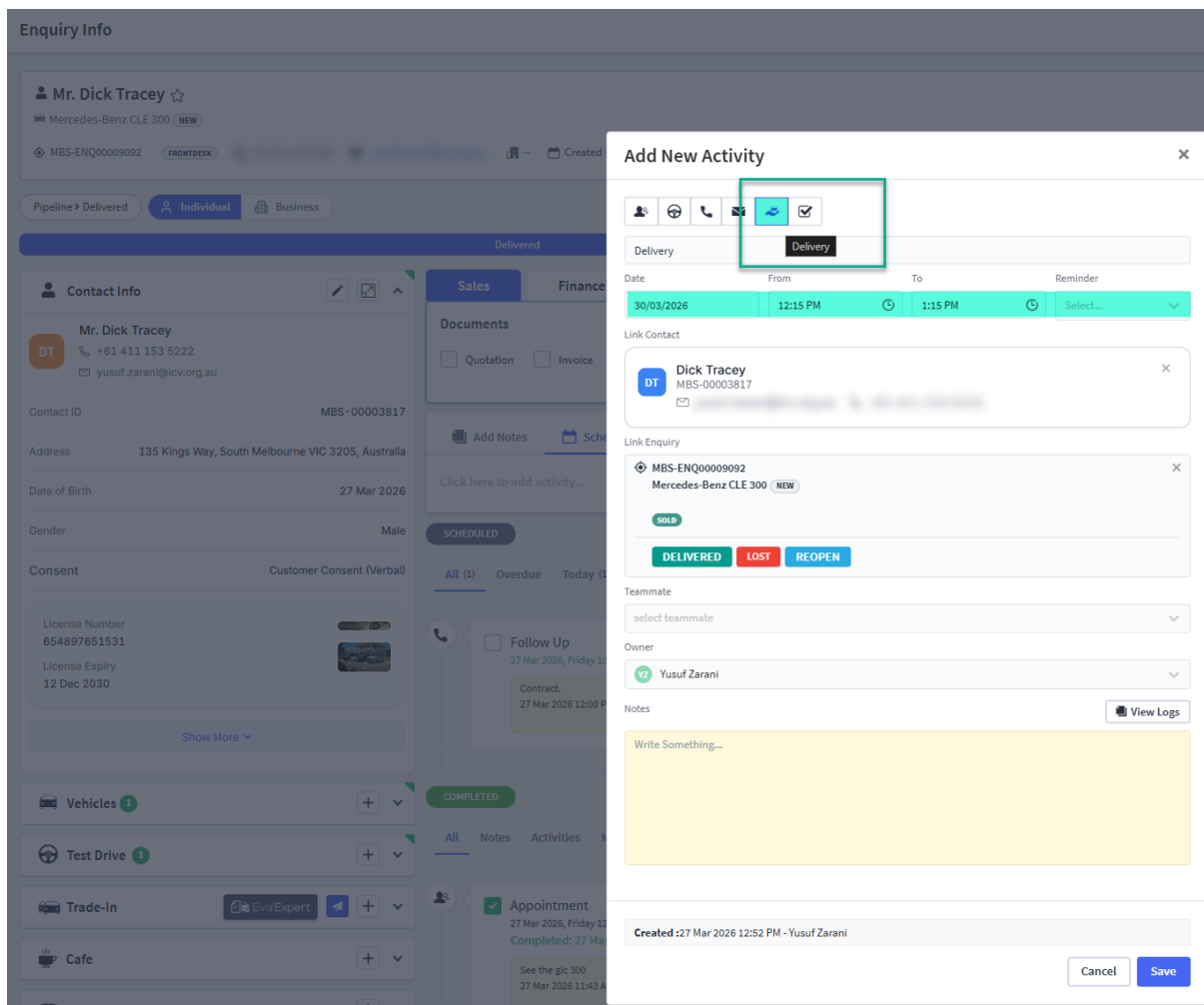


# Delivery

## Scheduling delivery

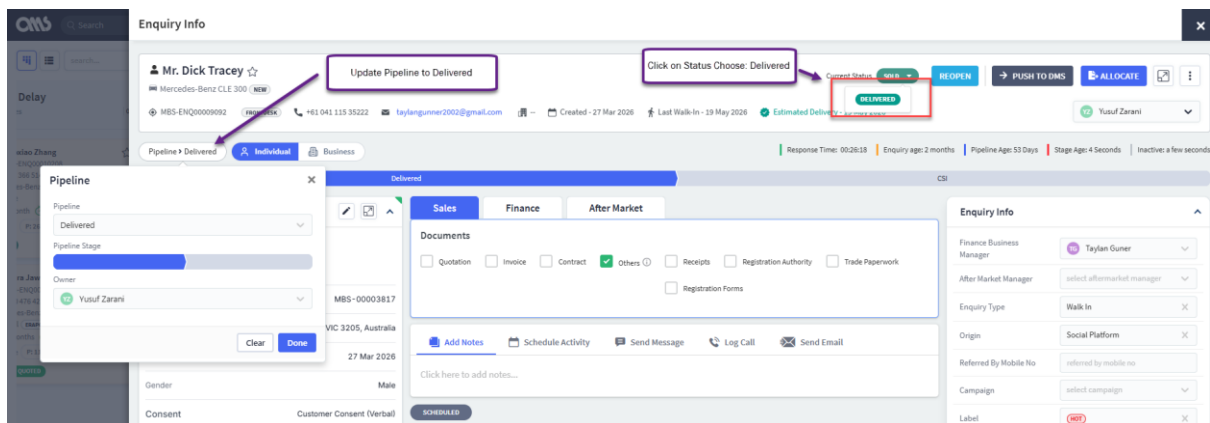
When the vehicle is ready for delivery it is important that we schedule a new activity for the date the vehicle is being delivered.

This step is vital for the automated emails and SMS pertaining to the delivery of a vehicle. (Trigger Communications: Delivery-Delivery date confirmation EDM, Delivery-3 days before delivery checklist EDM, Delivery-1 day before-SMS.



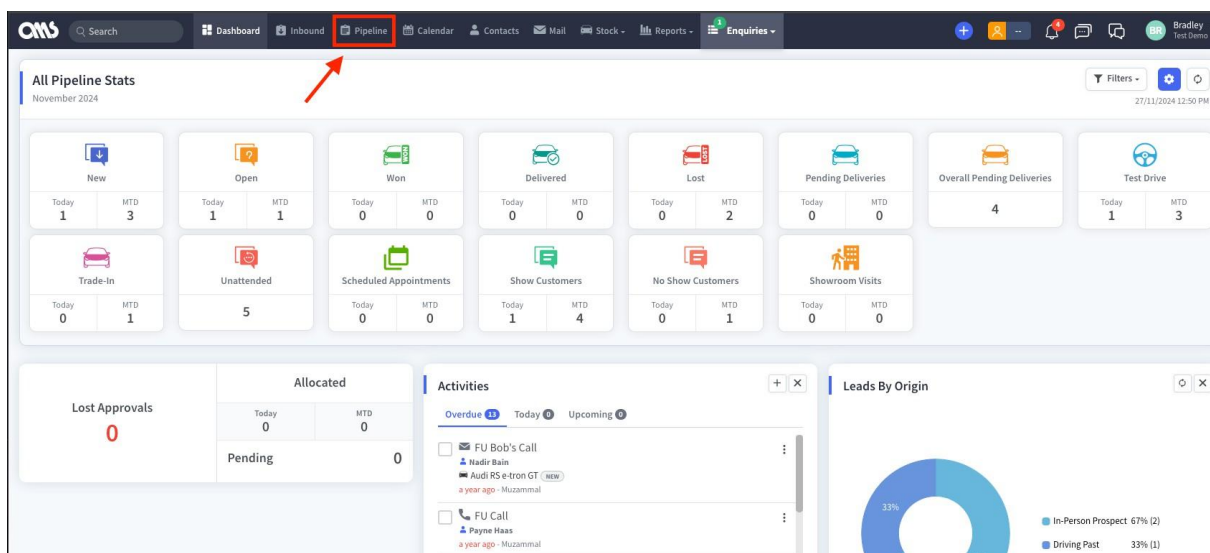
## Delivery: Change Status

When a vehicle has been delivered, we need to change the status to “Delivered” and move the entry into the “Delivered Pipeline”. Along with this it is imperative that the delivery date is updated as per the next step.

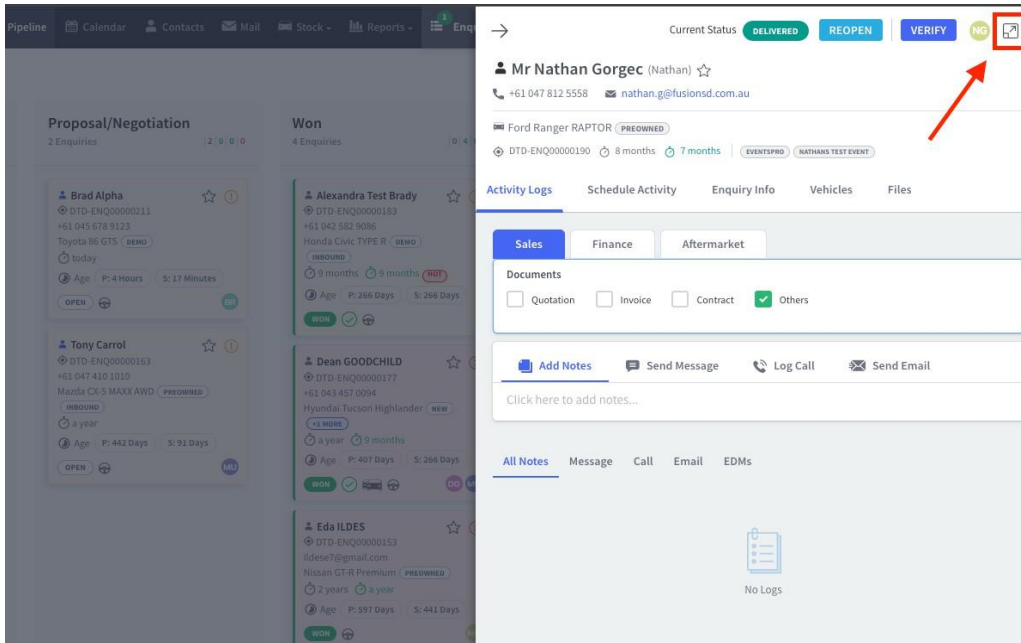


## Delivery: How To Update Delivered Date on an Enquiry

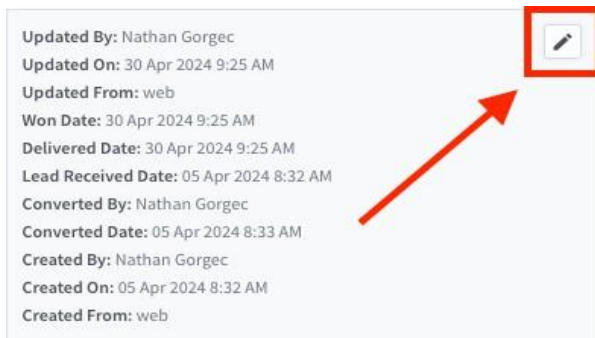
Go to **Pipelines** by clicking on the **Pipeline icon** in the icons dashboard at the top of your screen.



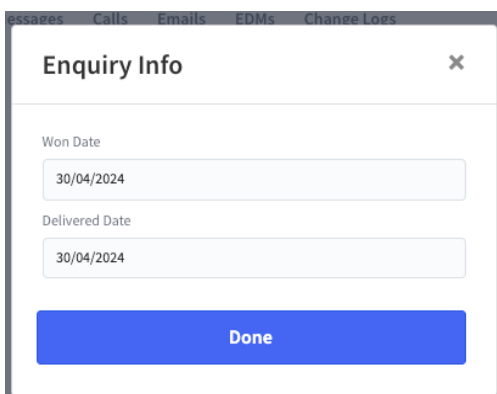
Navigate to the **Delivered Pipeline**, locate and click on the enquiry you wish to change and click on the **Details icon** to expand to the enquiry:



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:



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

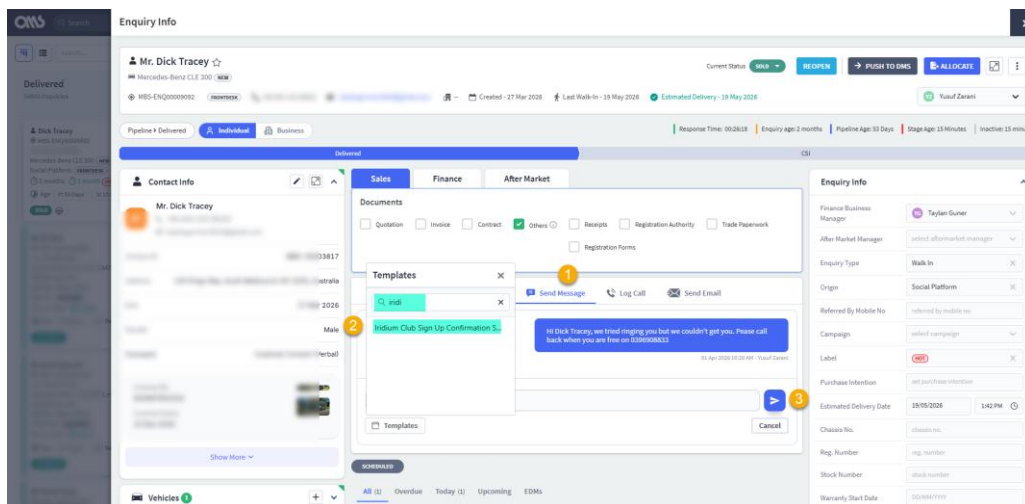


## Delivery: Iridium Club Membership Sign Up

At delivery we should sign up a customer to the Iridium Club by LSH Auto Australia. This is a two-step process,

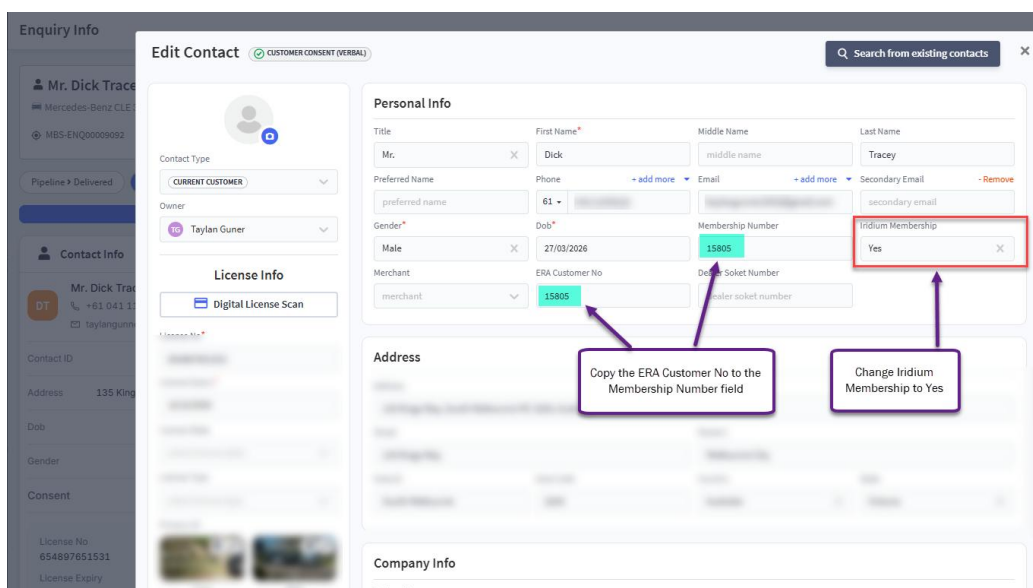
### Step 1: Consent

Go to the customer > Click on “Send message” > In the filter type Iridium and choose the template > Send the SMS



### Step 2: Activate the membership

In the customer change the Iridium Membership status to Yes and copy the membership number from ERA customer number > Save.





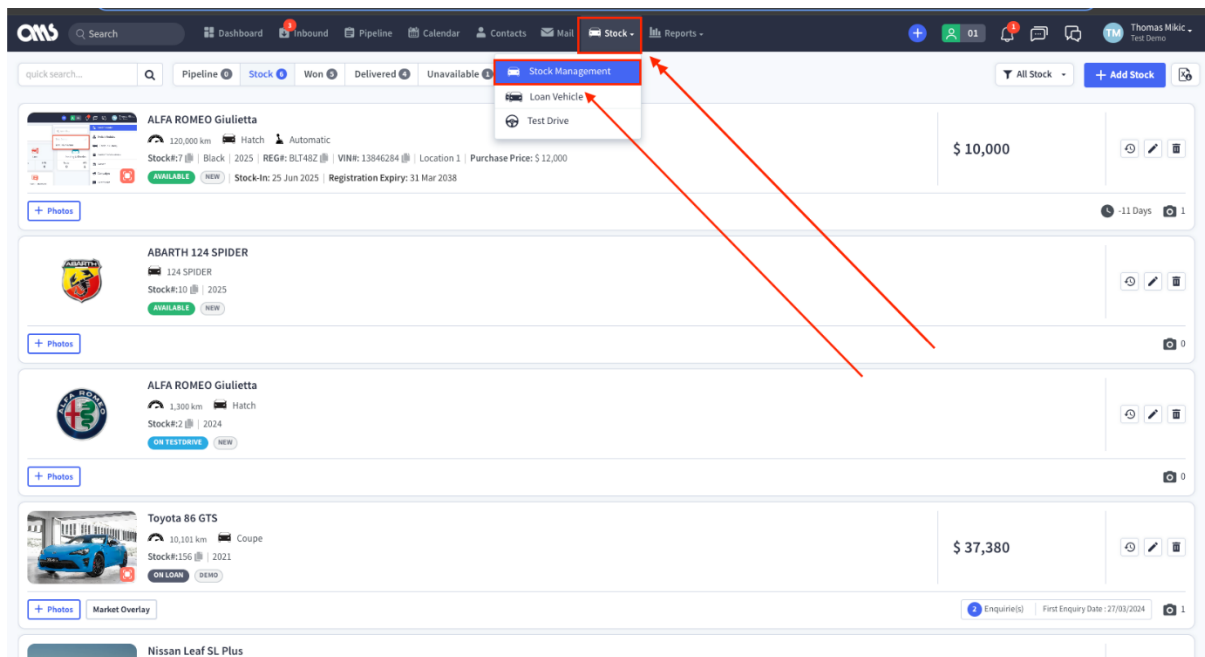
# Stock Management

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

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

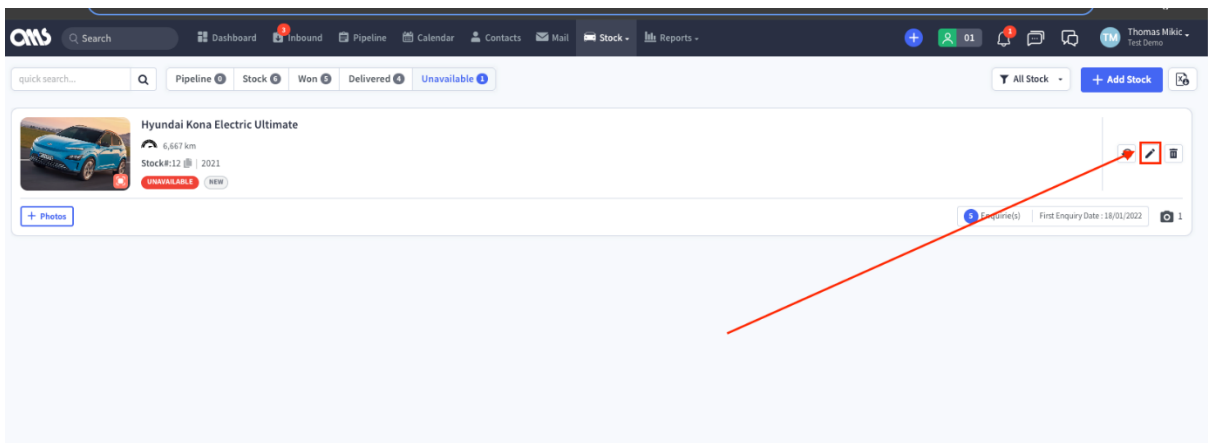
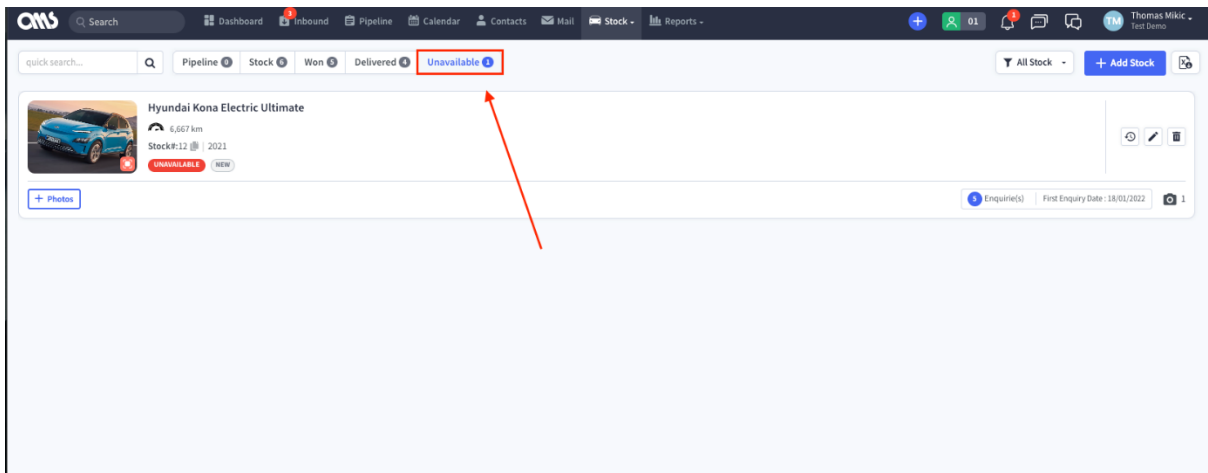
### Step 1: Access the Stock Management Module

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 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:** MMM 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 (selected)

The 'Status' dropdown menu is open, showing the following options:

- UNAVAILABLE (selected)
- AVAILABLE
- WON
- DELIVERED
- ON LOAN
- ON TESTDRIVE
- RESERVED
- IN PRODUCTION
- UNAVAILABLE

#### 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 the 'Stock' form with the following details:

- 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
- VN 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: MMM YYYY
- Warranty Start Date: 04/06/2025
- Warranty Expiry: DD/MM/YYYY
- 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, + Add Photos, 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
  - AVAILABLE NEW
  - + Photos
  - Enquire(s) | First Enquiry Date: 18/01/2022
- ALFA ROMEO Giulietta**
  - 120,000 km | Hatch | Automatic
  - Stock#: 7 | Black | 2025 | REG#: BLT482 | VIN#: 13846284 | Location 1 | Purchase Price: \$ 12,000
  - AVAILABLE NEW | Stock-In: 25 Jun 2025 | Registration Expiry: 31 Mar 2038
  - \$ 10,000

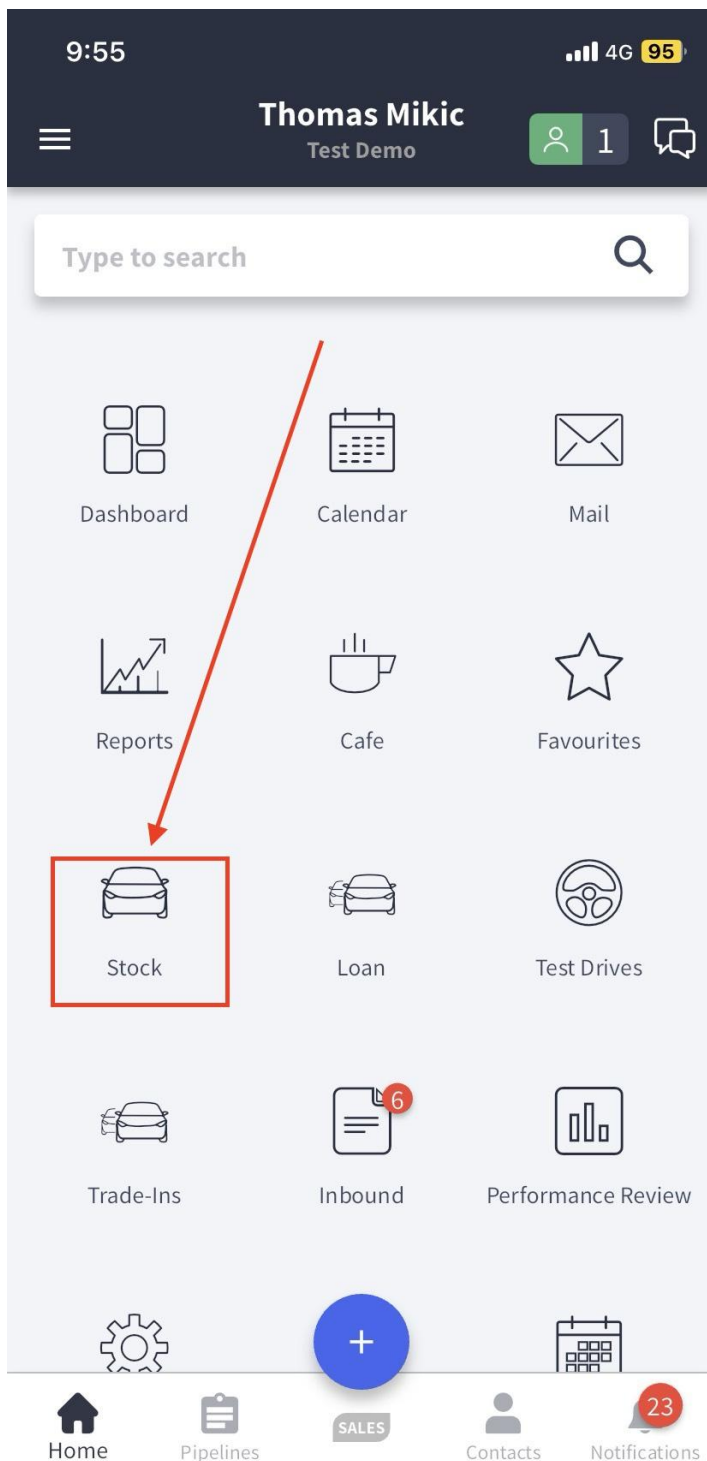
Upon saving, you will be redirected back to the Stock Management list. The stock item's new status will now be reflected on its entry, confirming that its availability has been successfully updated.

## 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 for a car dealership. At the top, the status bar displays the time 10:07, 4G signal strength, and a battery level of 93%. The app header is dark blue with a back arrow, the title 'Stock', a search icon, and a menu icon. The main content area lists three vehicles, each with a card layout. The first card, for a 'Nissan null', is highlighted with a red border. It features a white car image, 10,010 kms, 2002 model, 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. The status is 'NEW' and 'UNAVAILABLE'. A blue bar at the bottom of the card shows '6 Enquiries' and 'First Enquiry Date : 18 Jan 2022 >'. The second card, for a 'Tesla null', shows a red car, 2 kms, 2022 model, and 'Test Demo' tag. It has a table with 'Stock No' 2022, 'Reg No' --, and 'VIN No' --. The status is 'NEW' and 'ON LOAN'. A blue bar shows '1 Enquiries' and 'First Enquiry Date : 14 Jan 2022 >'. The third card, for a 'Hyundai Kona Electric Ultimate', shows a blue car, 6,667 kms, 2021 model, and 'Test Demo' tag. It has a table with 'Stock No' 12, 'Reg No' --, and 'VIN No' --. The status is 'NEW' and 'AVAILABLE'. A blue circular button with a white plus sign is visible on the right side of this card.

**Nissan null**  
10,010 kms  
2002  
Test Demo

Stock No	Reg No	VIN No
13	--	--

NEW UNAVAILABLE

6 Enquiries First Enquiry Date : 18 Jan 2022 >

**Tesla null**  
2 kms  
2022  
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  
Test Demo

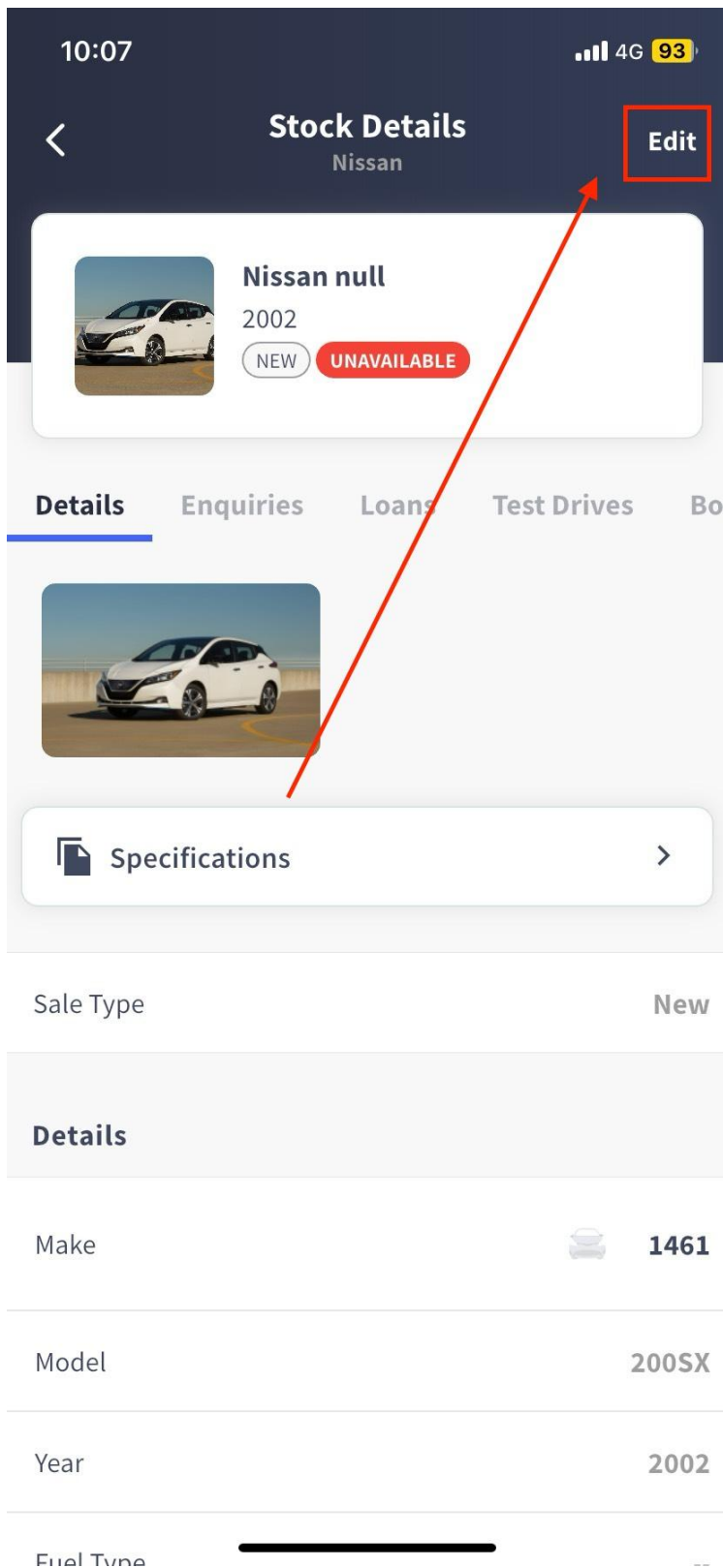
Stock No	Reg No	VIN No
12	--	--

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 the 'Update Stock' screen with the following fields:

- 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 ▼ (highlighted with a red box)
- Stock Arrived:
- 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

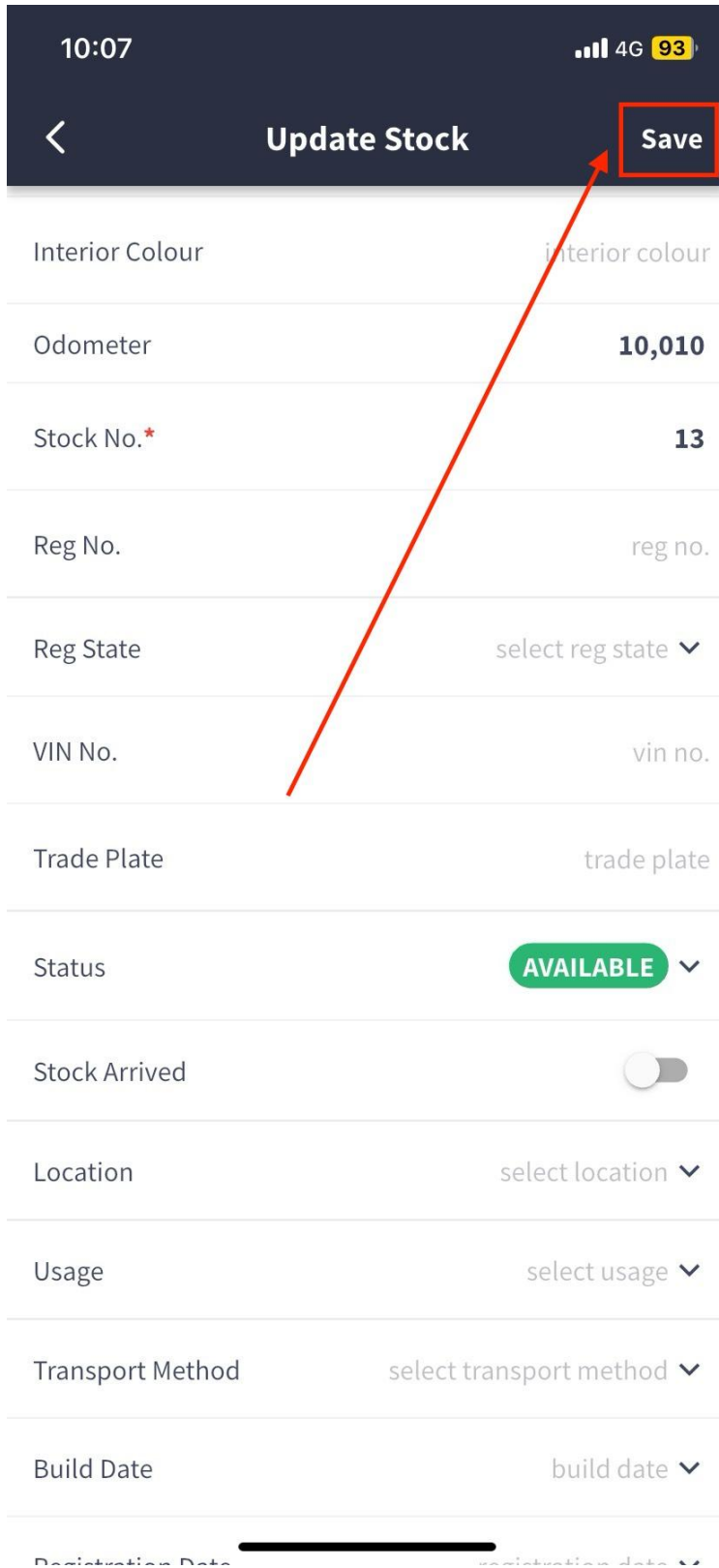
DELIVERED

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.



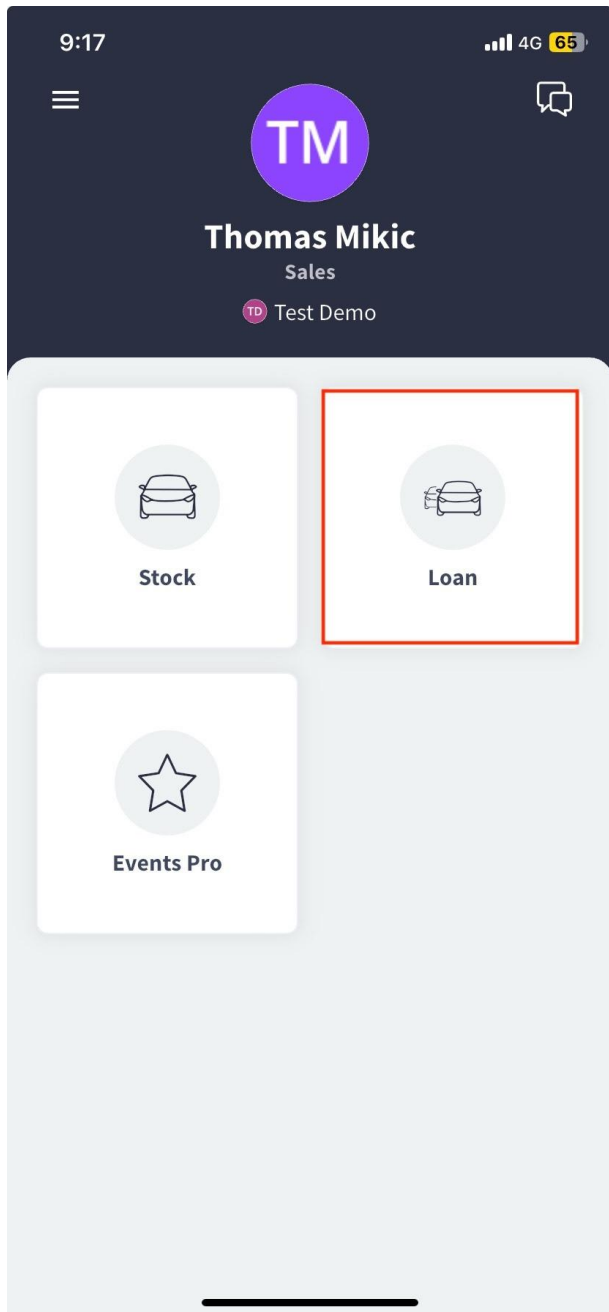
The screenshot displays the 'Update Stock' screen with the following fields and values:

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**

**4**  Loan Type

**5**  Purpose of the journey? +


**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

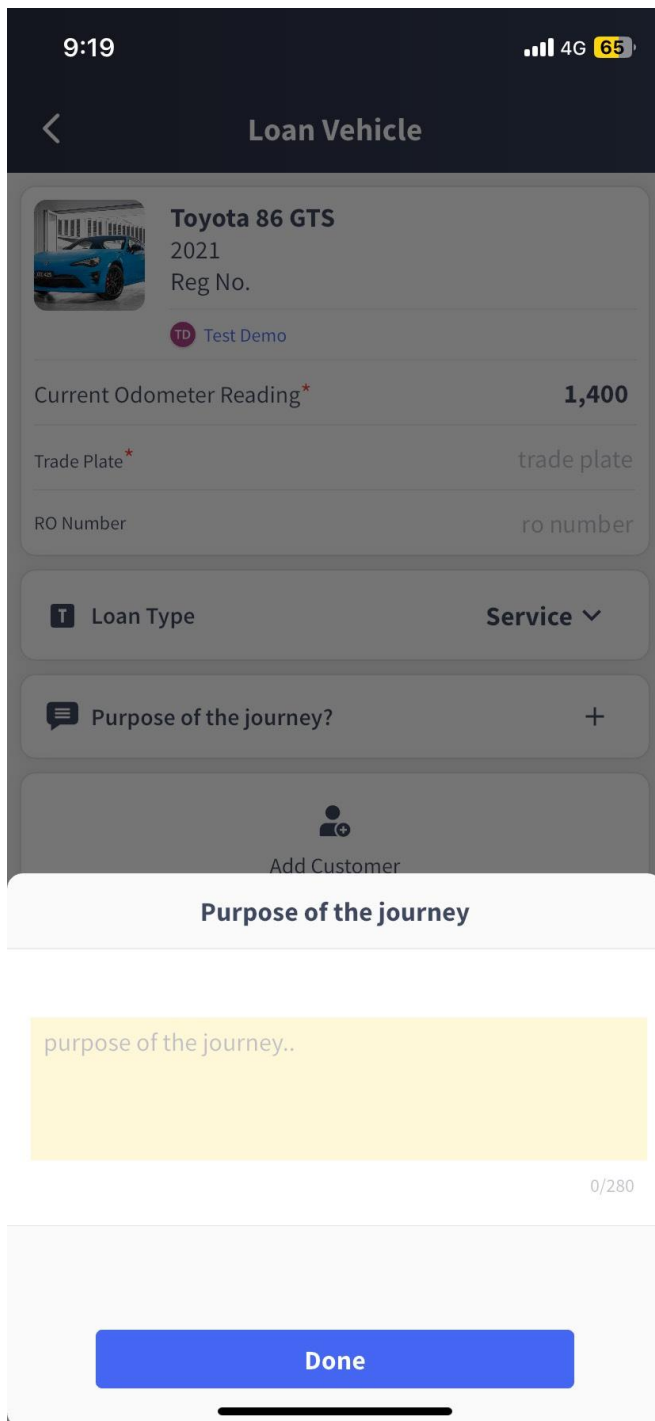
T Loan Type Service ▾

Select one

Service ✓

Other

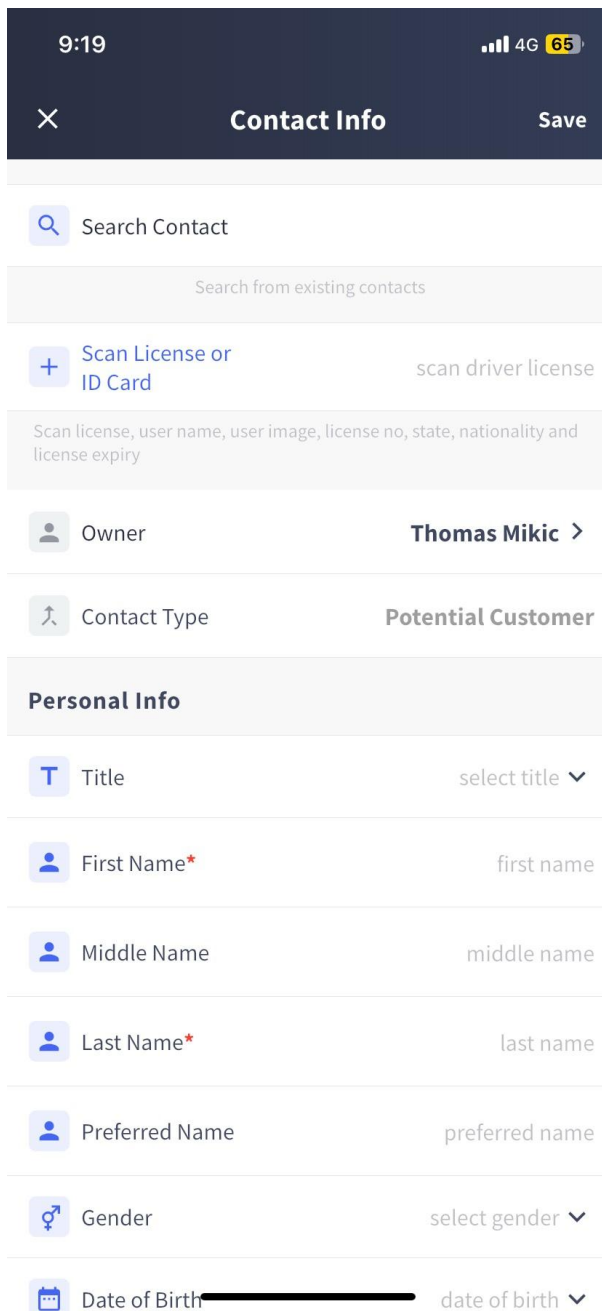
5. Click Purpose of journey and type the details for such



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? +

---

Person Customer Details ✓

Name **Aaminah Sims**

---

License No. **87874545**

---

Phone **+61 045 512 3321**

---

**Before Loan**

Car Vehicle Inspection +

---

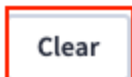
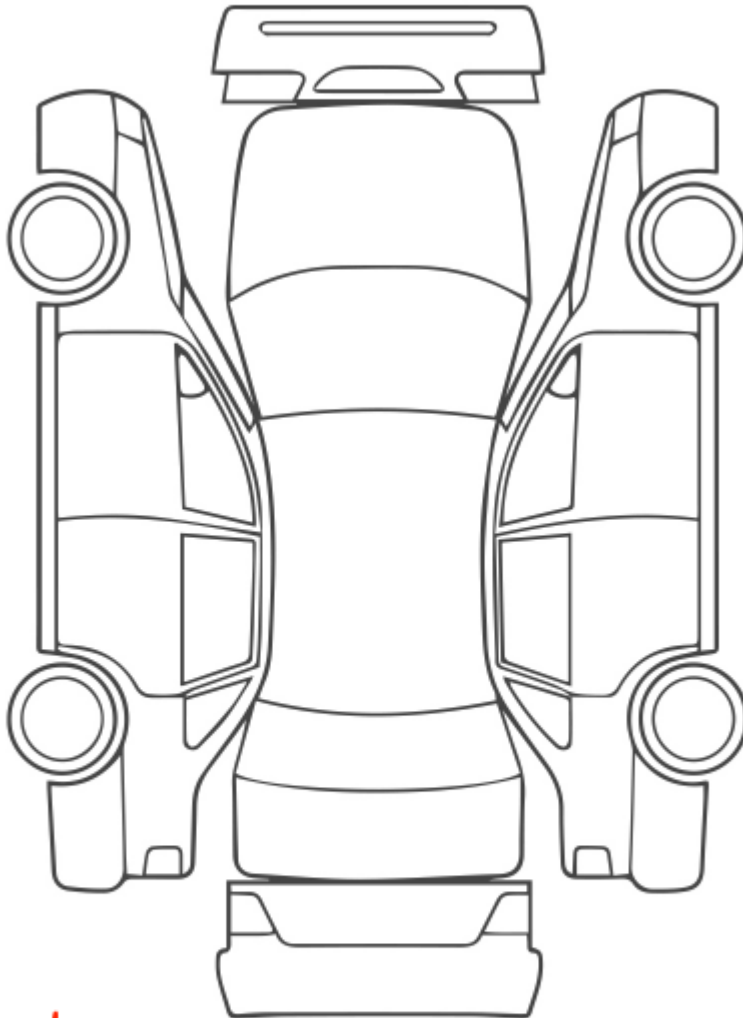
Fuel/Battery Start Fuel/Battery Level **Empty**

---

**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



2

3



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 Save

4 5

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.

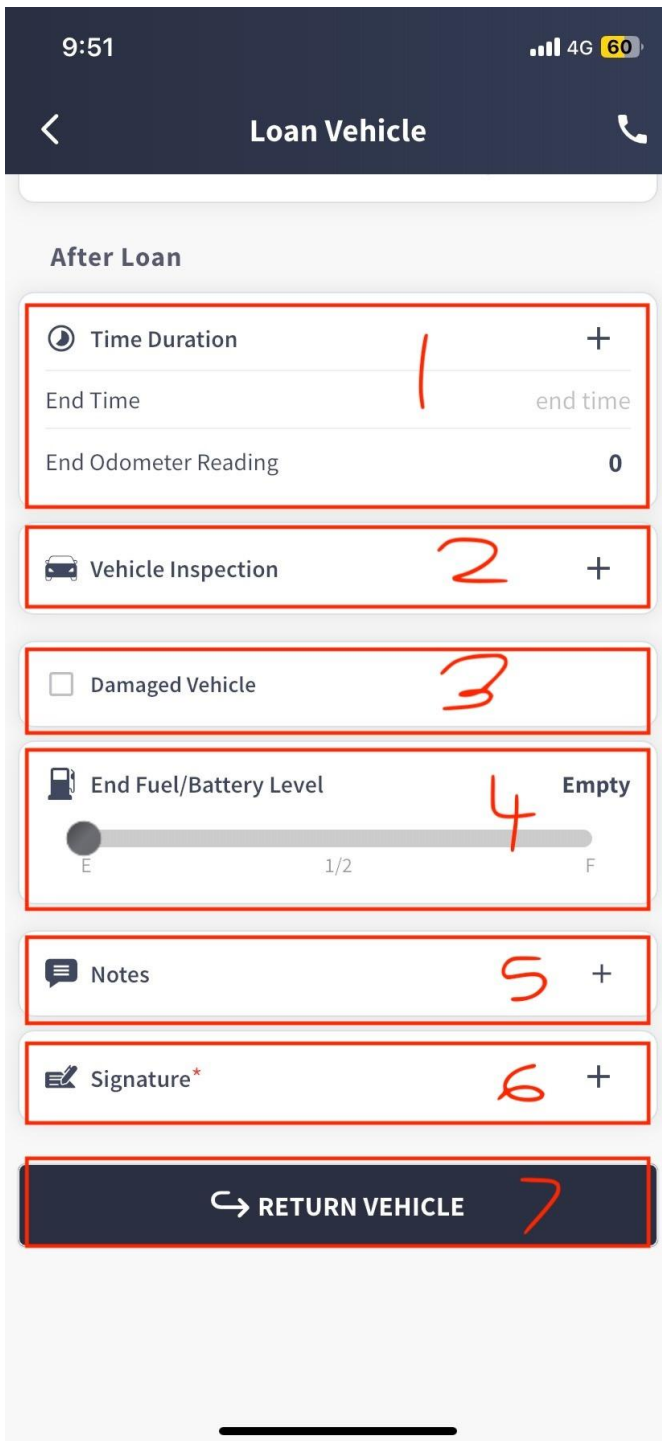
Click on the vehicle to return.

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.



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

