



Pinewood Stock+

For any issues relating to any of the items included please contact the Pinewood Helpdesk at support.portal@pinewood.co.uk

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Pinewood Stock+



Stock+ is Pinewood's brand new stock management app - an effective tool for sales executives to manage vehicle inventory.

Search your vehicle inventory, displaying the basic details for any vehicles in stock. This is useful for dealers with multiple sites, enabling customers to view stock from alternative locations. Our website feed allows you to load stock vehicles to your website, including images and videos of the vehicle.

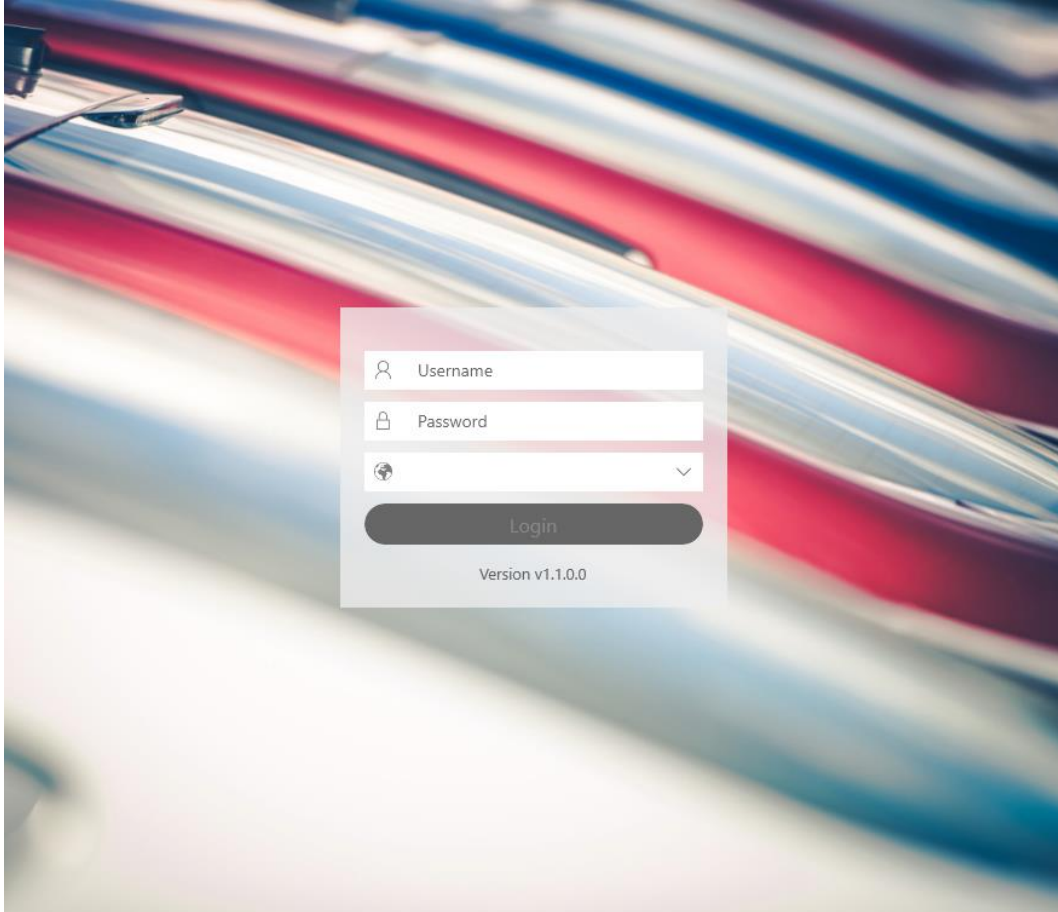
Record and send personalised videos to your customers by SMS or email, in advance of them visiting the dealership, enhancing their purchase experience.

Upload documents and store them against a CRM record, quickly and efficiently. This may include test drive documentation or a copy of a customer's driving licence, which can then be saved against their CRM record, in advance of a test drive or an upcoming future contact. Stock+ is an easy to use and efficient tool for storing customer documents.

The Stock+ app is fully integrated with Pinewood DMS, allowing you to manage vehicle stock effectively.

Login Screen

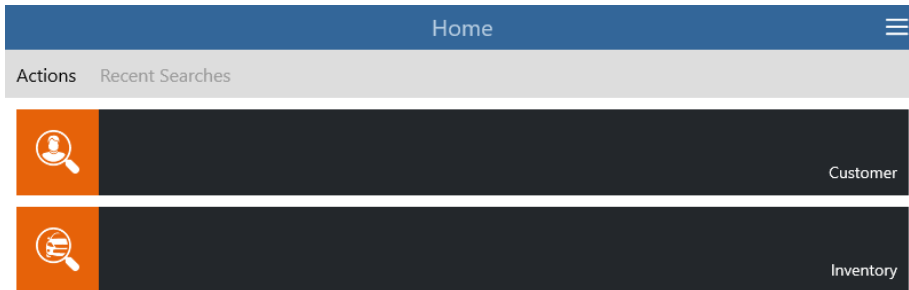
The Login screen displays as below:



Please enter your Pinewood DMS credentials to log in.


Home Screen

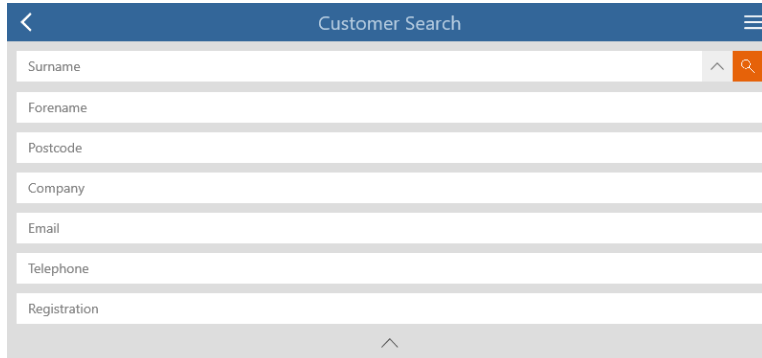
The home screen allows users to view the Actions for either Customer or Inventory. The Recent Searches title allows users to view any recent searches and go back to these if necessary.



Customer

Selecting the Customer tile will allow you to search for a CRM record and choose the desired customer from loaded search results.

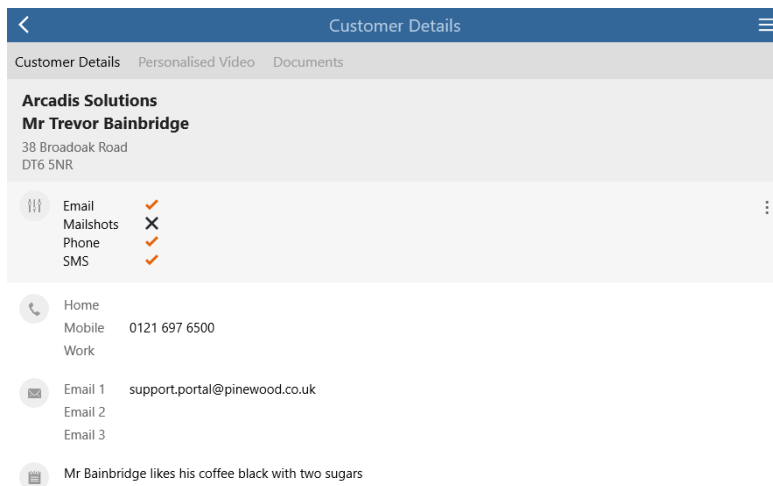
Using Surname as a default search criteria or by selecting the  icon user will be presented with additional search criteria.



Type a Surname in the search box above or expand the search for more options

Customer Details

Once the desired customer has been identified, the record can be selected which will load Customer Details as per below example:



When GDPR / Data Protection is enabled, a user will see the three dots on the right side of the contact methods, (ellipsis icon) which if clicked will display full details regarding customer permissions:



General

The following options will set preferences for general communications.

- Email
- Mailshots
- Phone
- SMS

Exclusive Vehicle Offers

Click to hear from our retailers as soon as new and pre-owned offers are released.

- Email
- Mailshots
- Phone
- SMS

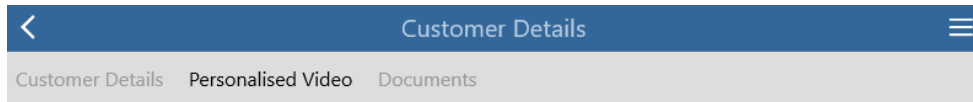
Aftersales Promotions

Click to hear from our aftercare centre when maintenance promotions become available for your vehicle.

- Email
- Mailshots
- Phone
- SMS

Personalised Video



You can select the Personalised Video tab to add videos to send to the customer:



It's lonely in here. Use the icon below if you want to add a personalised video.



Use the  icon to add videos.

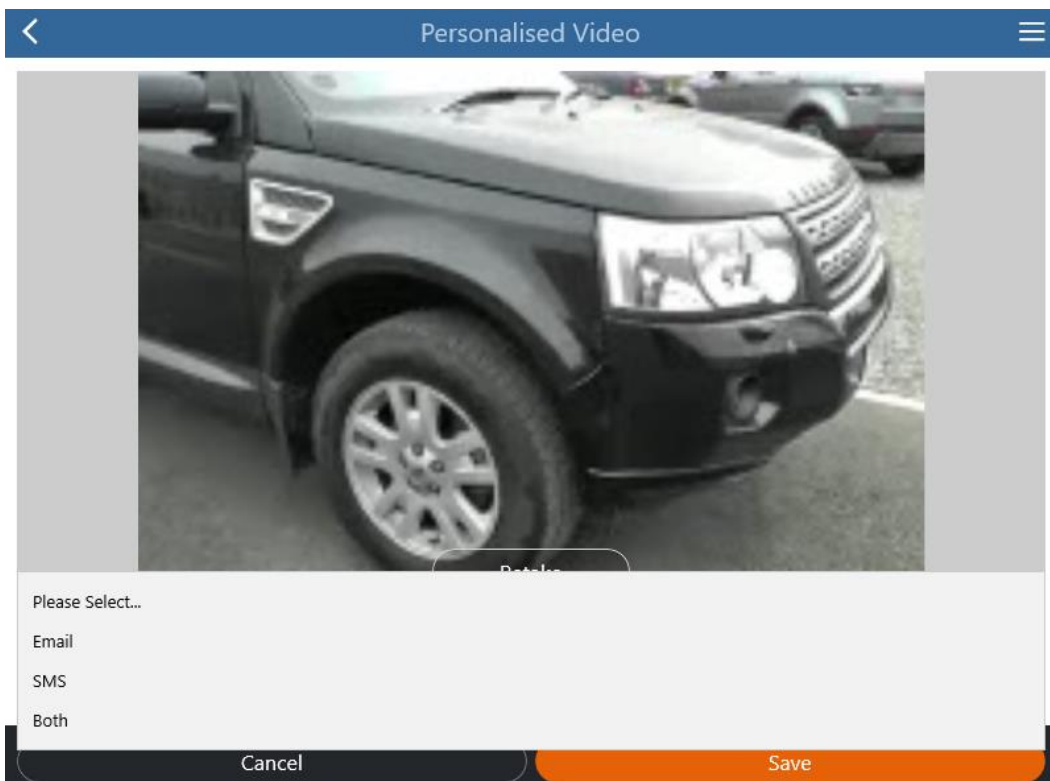
You can then record a video or select a pre-recorded video file from your device gallery using the   icons.

PLEASE NOTE: if you're are taking videos outside a reliable Wi-Fi connection range (e.g. parking lot, compound), we advise to use your native device camera and pre-record desired video clips which you can later upload using the app.

You can load more than 1 video and you are able to move these into any order using the drag and drop feature. You will then be able to preview or save this as one personalised video file to be sent to the customer.



Once the video is saved you are prompted to select a contact method to send this to the customer.



You will have the option to send personalised video to a customer either by Email, SMS or Both.

The screenshot shows a mobile application interface for creating a personalised video. The title bar is blue with a back arrow on the left and a menu icon on the right. Below the title bar, there is a 'Description' text field. Underneath is the 'Email Options' section, which includes a sub-section 'Addresses' with three rows, each containing a checkbox and a text field labeled 'Email 1', 'Email 2', and 'Email 3' respectively. Below that is the 'SMS Options' section, which includes a 'Message' text field (highlighted with a red border) and a 'Number' text field containing the value '1234 56789'. To the right of the message field, it indicates 'Characters Remaining: 138'. At the bottom of the screen, there is a black bar with two buttons: 'Cancel' and 'Save'.

You will be able to add a description for the video so the customer can identify what the contact is regarding.

The email options will pull what is currently created against the customer account in Pinnacle. You can also amend these options at this stage. The customer may have changed email address or would like to add an additional email. Any changes to the customer contact details will also update within Pinnacle once saved.

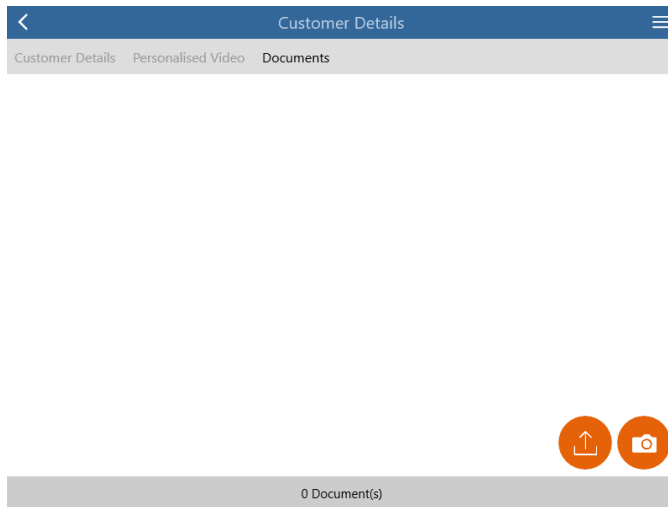
For SMS you are given the option to add a short message regarding the video.

The number can also be amended if the customer advises they have changed their number. This will also be saved against the CRM record in Pinnacle.

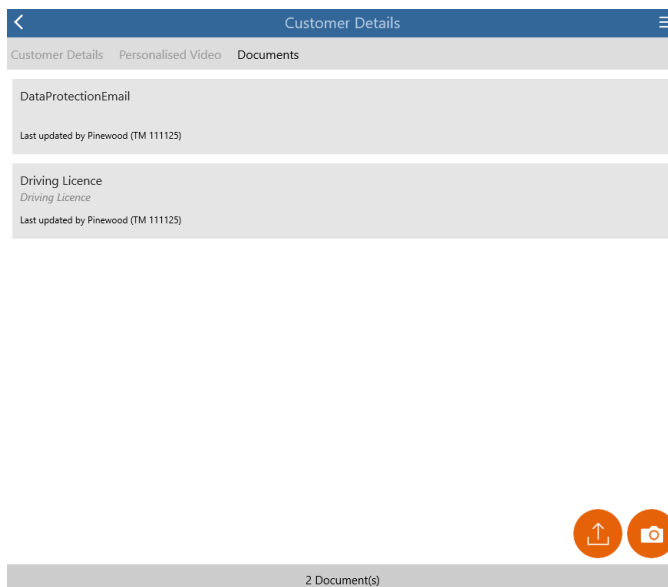
Once all mandatory details are populated and saved a personalised video will be sent to a customer. This action will then be recorded against the customer record and the video will appear within the personalised video heading to view. You are unable to resend the video from Stock+, however, this can be re-sent from Pinnacle if required.

Documents

Documents and pictures can also be uploaded via the Documents tab.



Using the  icon for document uploads or the  icon to take pictures.



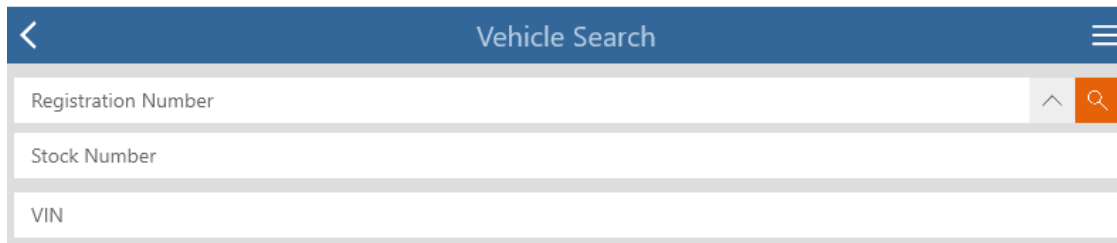
Documents can then be saved against a customer record and will appear to view within the Documents tab for future reference.

Please note these cannot be deleted from the Stock+ application.

Inventory

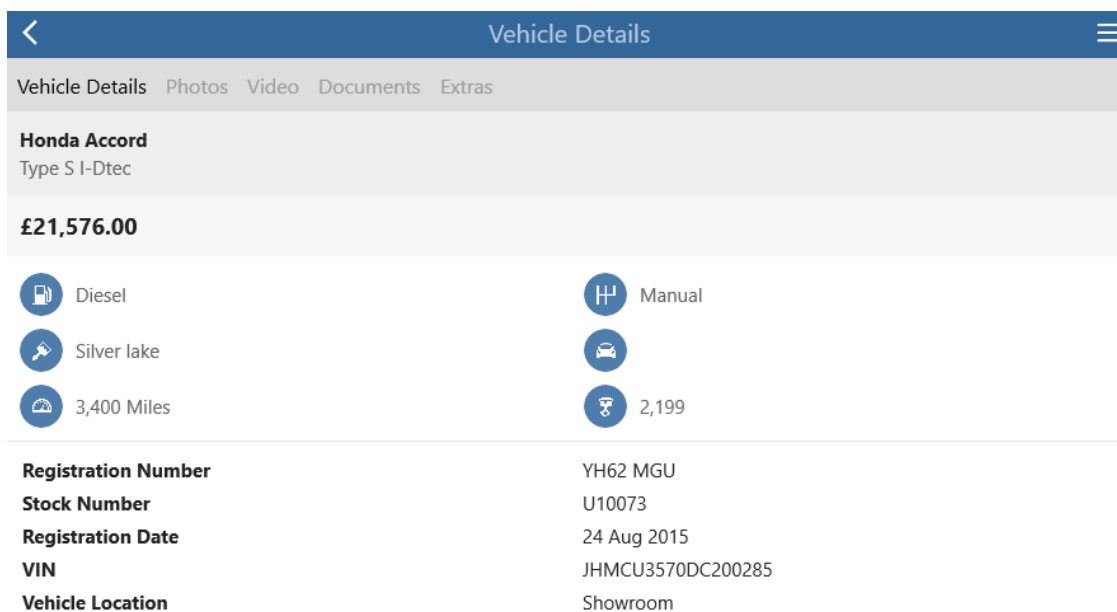
Vehicle Search

Within the inventory section you are able to search for New and Used vehicles that are on a status of In Stock to add stock images, video, documents and manage optional extras.



To search for any new or used in stock vehicle please specify at least one of the three search criteria (partial search is allowed). Once a desired vehicle is identified, by selecting the stock record user is taken to Vehicle Details section.

Vehicle Details

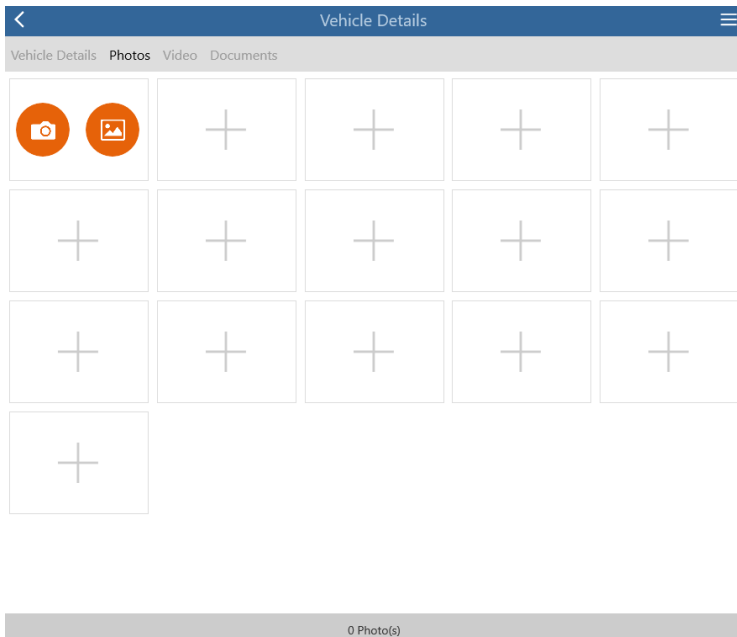


Registration Number	YH62 MGU
Stock Number	U10073
Registration Date	24 Aug 2015
VIN	JHMCU3570DC200285
Vehicle Location	Showroom

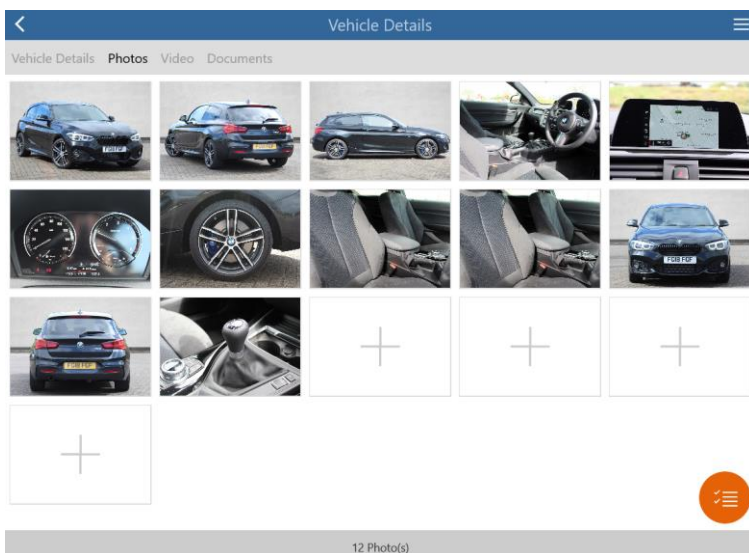
Photos



You can select the Photos tab to add photos against a vehicle record.

Once a photo box is selected, you are able to take a photo or upload an image from a device gallery:

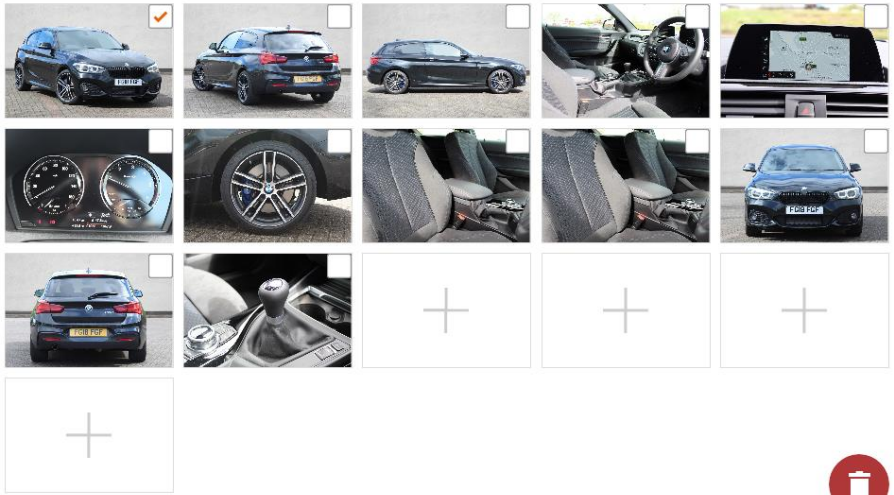


Use the  icon to take a new image or the  icon to upload an image from your device gallery.



Using the  icon you can arrange or delete any photos before saving these. To move a picture, use the drag and drop feature within the slots. Using the check box in the corner of the picture, select any pictures for deletion and use the  icon to delete.

Vehicle Details Photos Video Documents




12 Photo(s)

Cancel Save

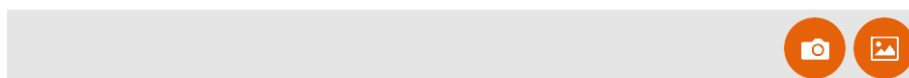
Video


Within the Video tab, you are able to add a stock video. Only one video can be uploaded to a stock card, however you are able to take multiple videos and stitch these together to create one single stock video. These are then saved to the stock card.

To add a video use the  icon. You then have the option to either record a new video, or upload one that is pre-recorded from your device gallery.



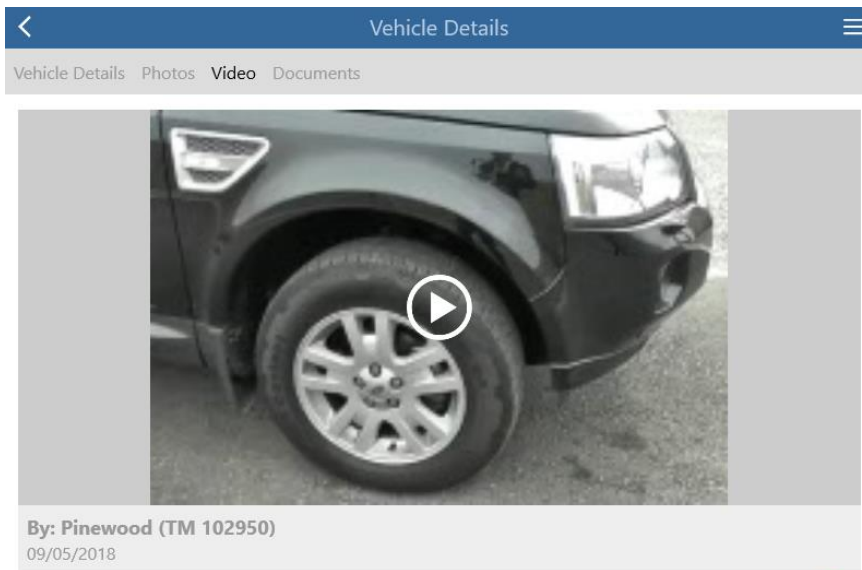
Use the buttons below to record or select a video clip





Once the video is added, you are able to delete any of the videos taken if necessary using the  icon showing beneath the video thumbnail:



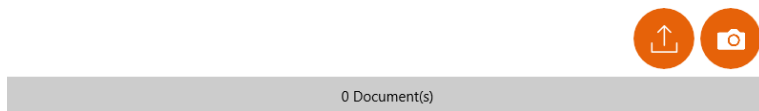
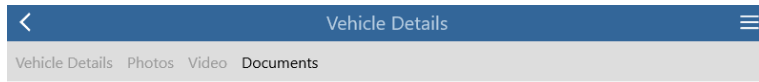
You can also drag and drop the videos into any order you would prefer. Additionally, you can preview a stitched video before saving it to a stock card record. Once the user is happy with a final stock video, just click on the Save button to complete video upload.




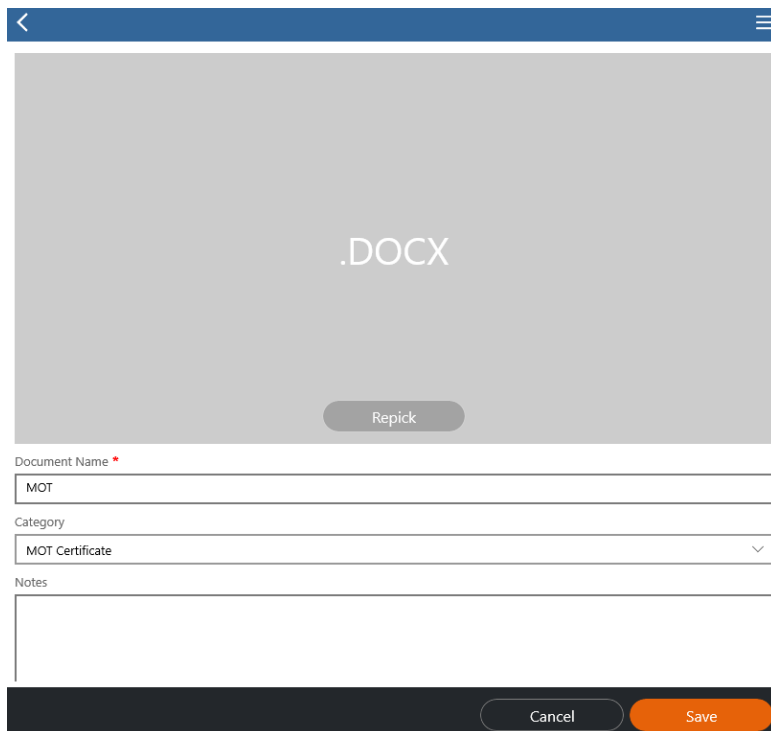
Once this is saved, you have the option to delete the video using the  icon or the  icon to replace the existing video with a new one.

Documents

Documents and pictures can also be uploaded via the Documents tab:



Using the  icon for document uploads or the  icon to take pictures.

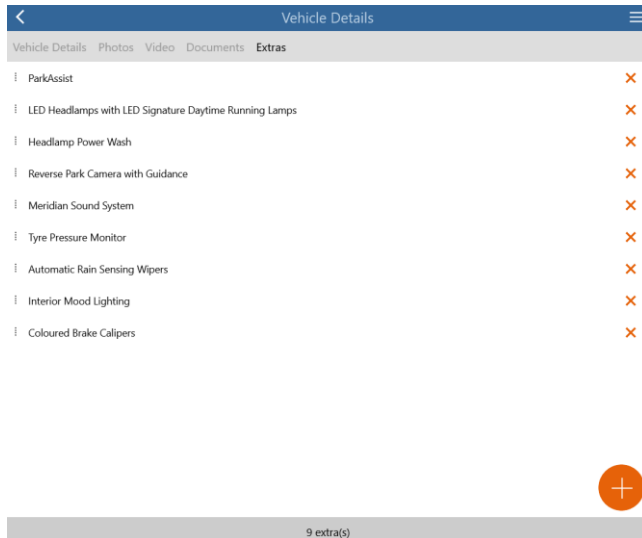
A screenshot of the document upload form. At the top, there is a blue header bar with a back arrow and a menu icon. Below the header is a large grey area with the text '.DOCX' in the center and a 'Repick' button at the bottom. Below this area are three input fields: 'Document Name' with the value 'MOT', 'Category' with a dropdown menu showing 'MOT Certificate', and 'Notes' with an empty text area. At the bottom of the form is a black bar with two buttons: 'Cancel' and 'Save'.




These can then be saved to a vehicle stock card and will appear to view from the Documents tab, as well as on Pinnacle.

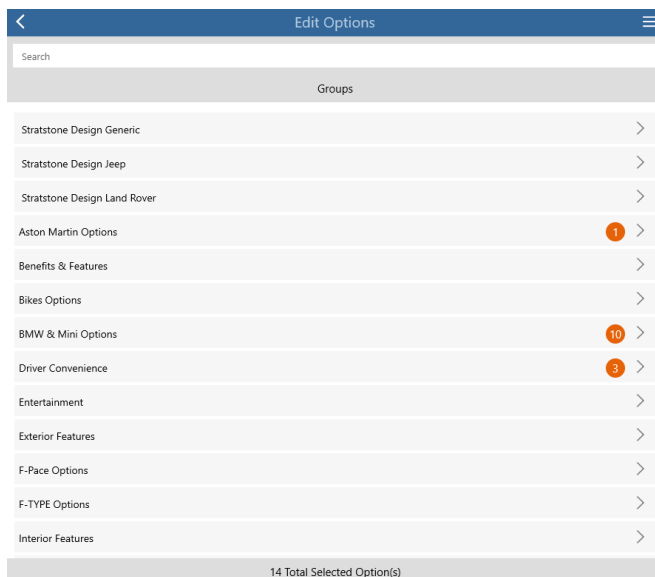
Extras

You can view set extras against a stock record, as well as amend a list of extras by adding, removing and re-ordering items.

View list of extras:

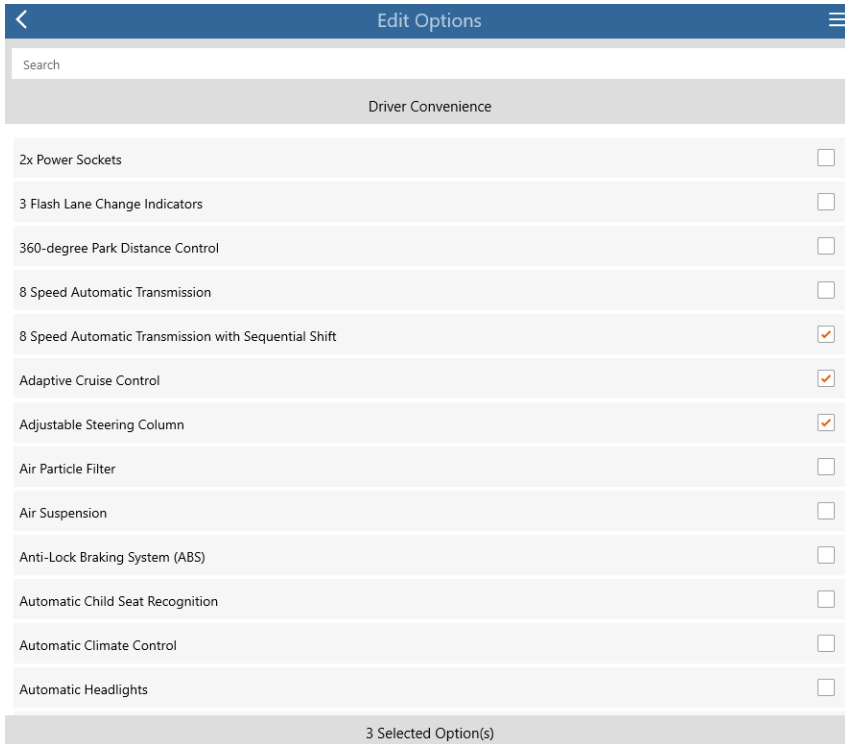


To delete click on the  icon to delete any item, and on the  icon to re-order items on a list by dragging and dropping a line item into desired position. To add any new item to the list click on the  icon. This will take user to optional extras groups list:

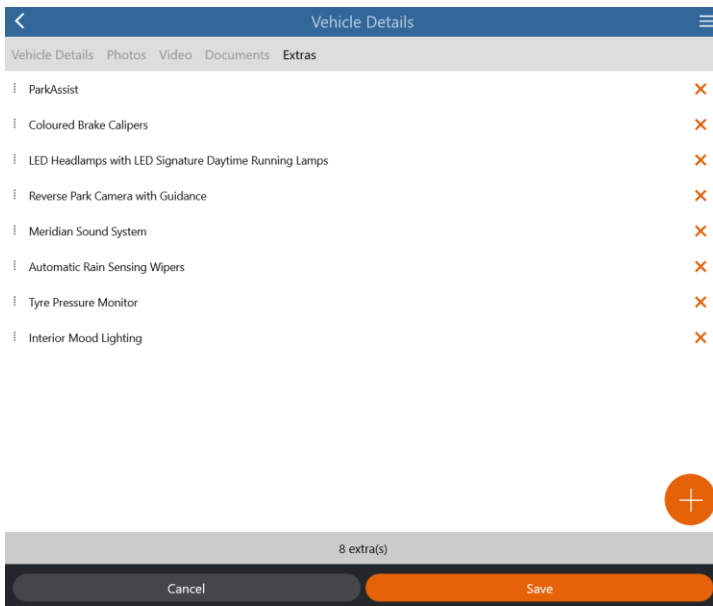


The circle with a number indicates the number of options selected within a particular group.

Select a desired group and tick applicable extras to add to the list on the main Extras screen:



Any changes have to be actioned by clicking Save:



All the changes made will also be reflected within Pinewood DMS. However, if a user selects Cancel, all changes made will be discarded taking the user back to pre-amends extras list.

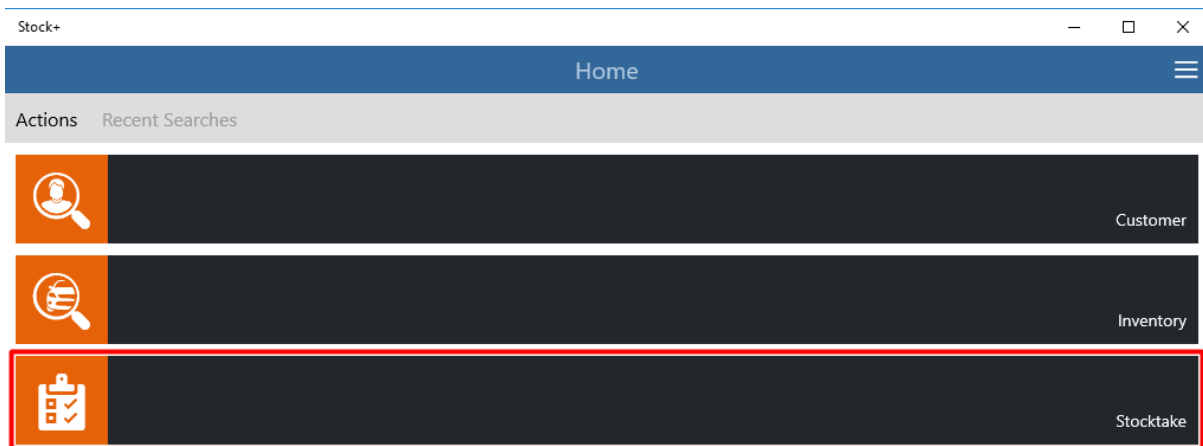
Stocktake

Overview

You are able to complete a Vehicle Stocktake from the Stock+ App

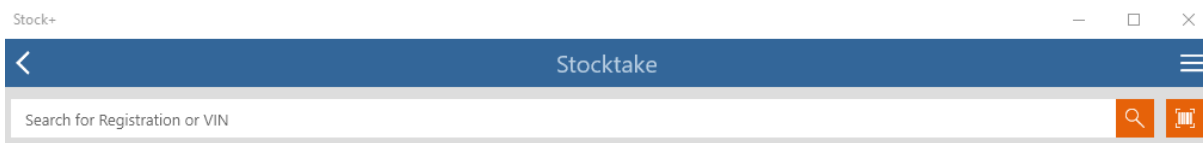
Summary

To complete a Stocktake on the Stock+ App, firstly you will need to click into the Stocktake area on the App.



Once you have clicked into here the App will ask for access to your location, to proceed to complete the Stock Take you will need to allow this.

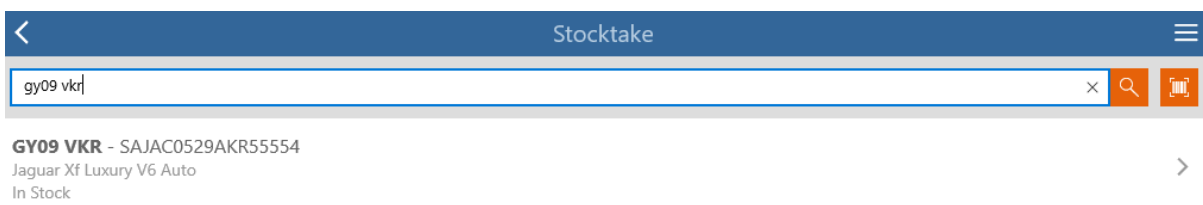
You are able to search the relevant registration number or VIN of the Vehicle:



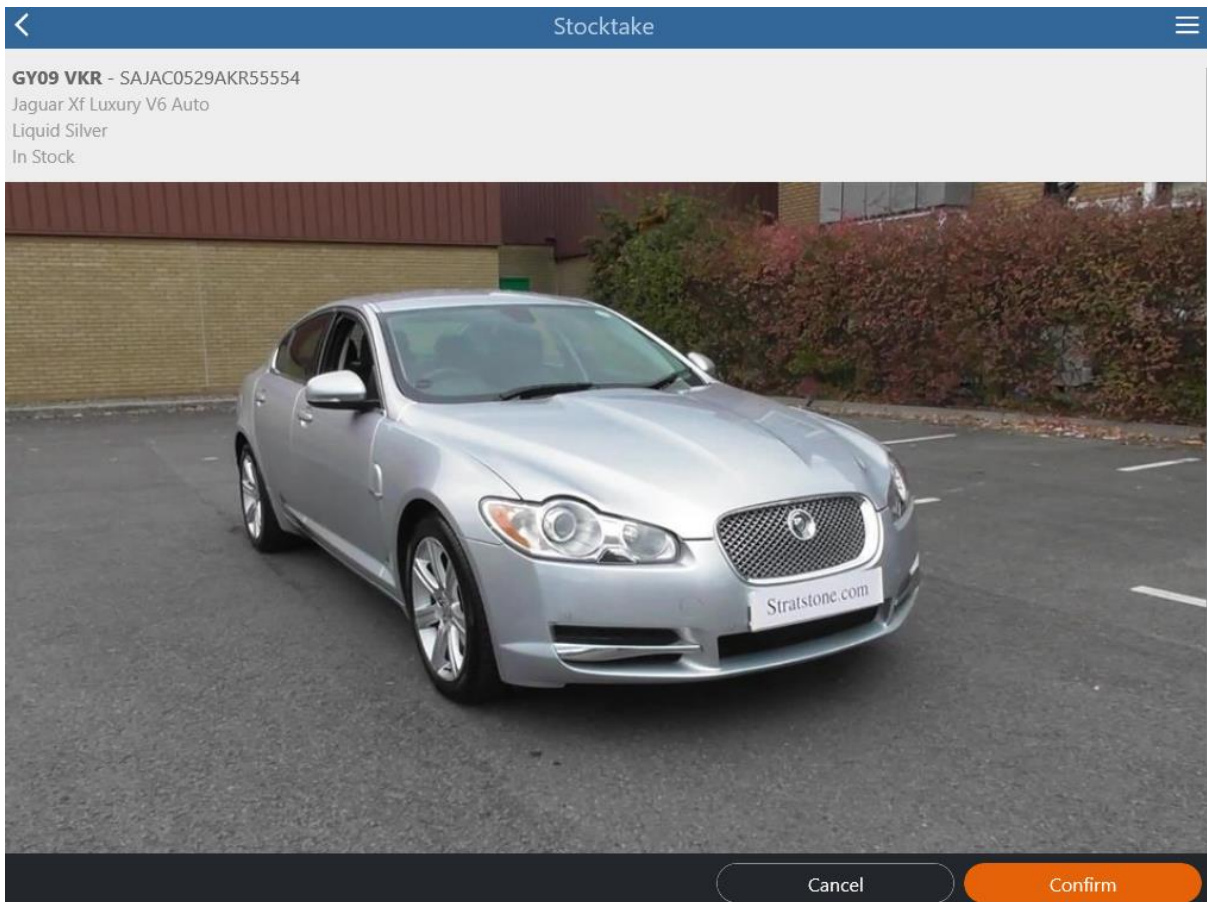
There is also the option to select the 'Scan' button, which allows you to scan the VIN of the car whilst completing the Stocktake.



Once the relevant record has been searched/scanned:

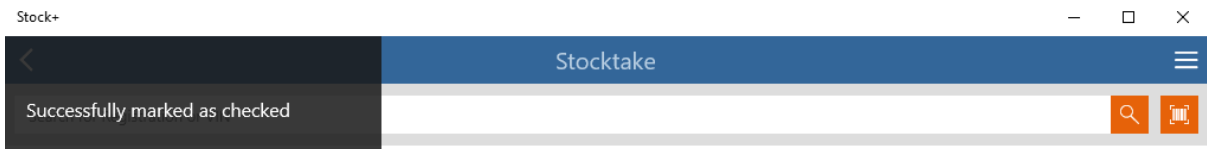


Select the record and it will display as below:



The image displayed pulls from the image loaded against the stock card.

To mark the vehicle as in stock, select Confirm.



The above message will then appear.

Once done you are able to view vehicles that have had a stock take completed against it within Pinnacle by going to: Vehicles > Reporting > Stock Lists > Stock List – click View and then Export:

Recent Search – VIN Display

Overview

If the vehicle has no registration number, a VIN number will now display in the recent searches area.

Summary

When a vehicle does not have a registration number entered on the Stock Card, within the recent searches area this will now display the VIN number of the vehicle as below.

