

Notes

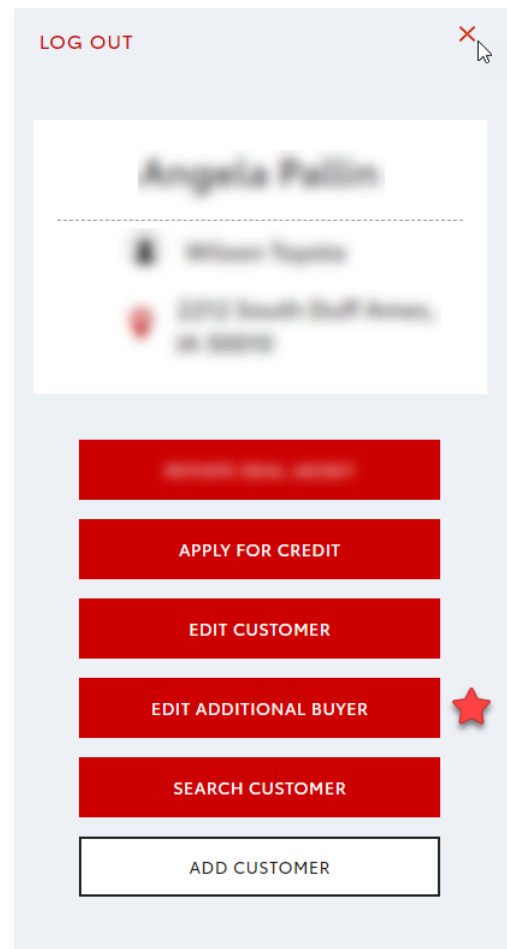
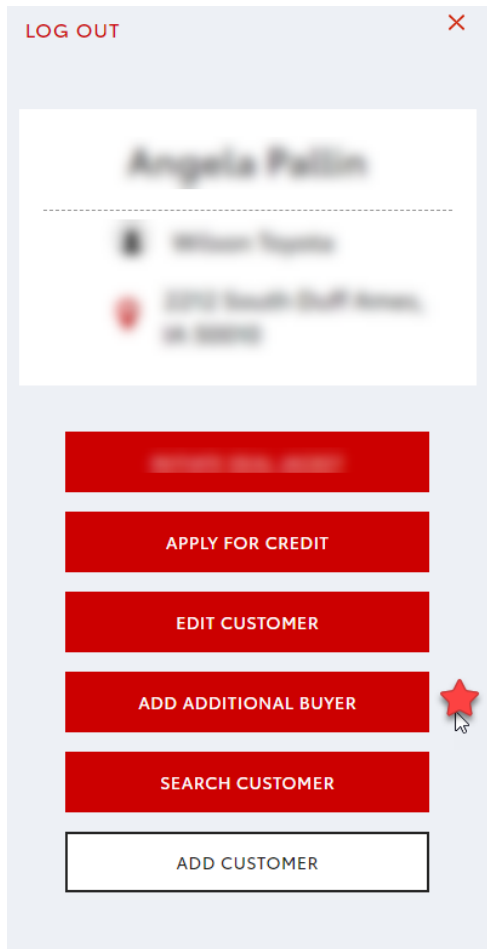
The following enhancements will be implemented in the July 10th MST and Console Release:

MST & Console Updates

Additional Buyer Enhancements

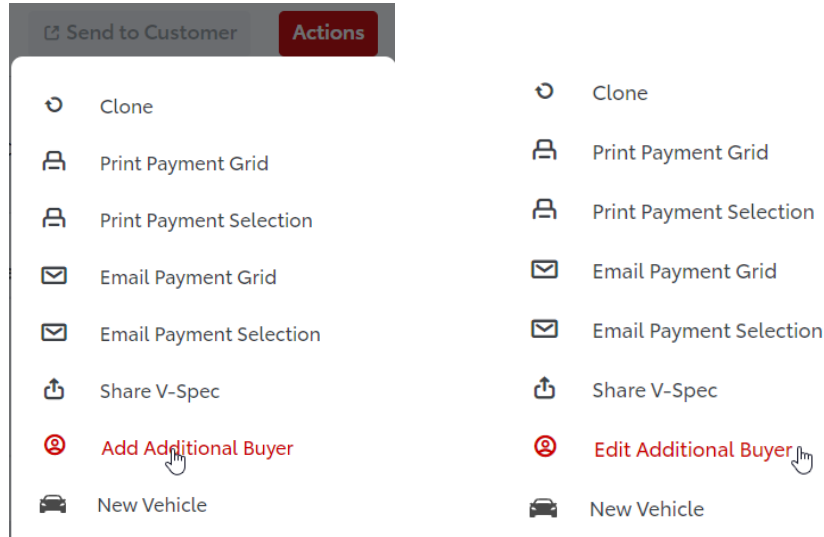
Users in MST and Console will now have the ability to add an additional buyer to a write-up. Once a write up is created, in MST you can add or edit an additional buyer in the hamburger menu. The action button will update from 'Add' to 'Edit' once an additional buyer is added.

MST



Notes

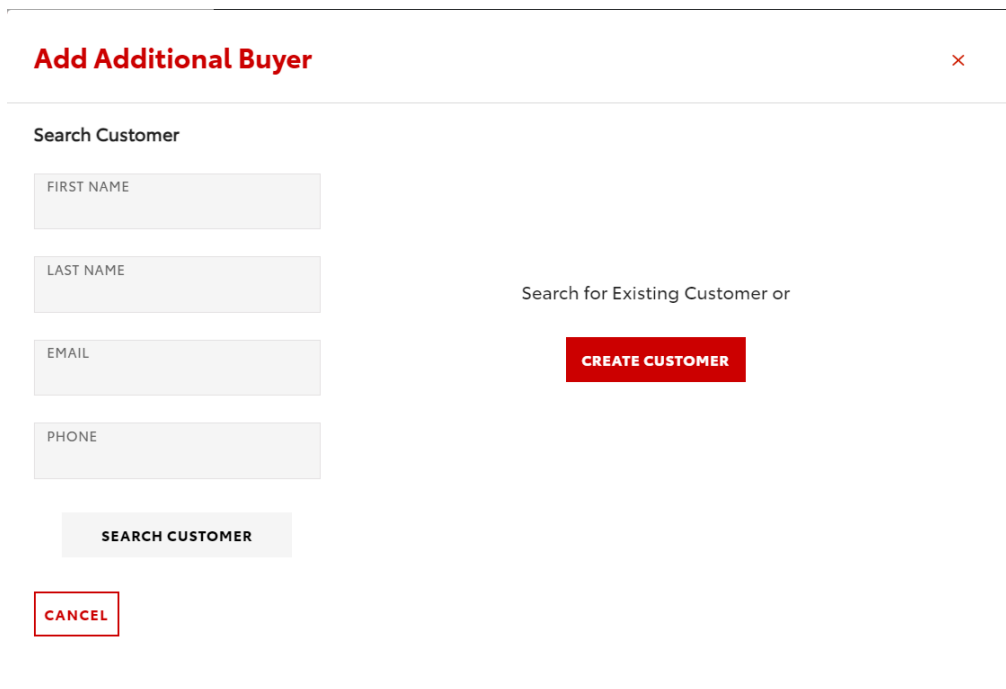
Console



The screenshot shows two instances of the 'Actions' menu in the Console interface. The left instance has 'Add Additional Buyer' highlighted with a mouse cursor. The right instance has 'Edit Additional Buyer' highlighted with a mouse cursor. Both menus include options: Clone, Print Payment Grid, Print Payment Selection, Email Payment Grid, Email Payment Selection, Share V-Spec, Add Additional Buyer, and New Vehicle.

If 'Add Additional Buyer' is selected the user will have an option to Create or Search for a customer in the Add Additional Buyer window in MST. In Console, only searching for an existing customer is allowed.

MST



The screenshot shows the 'Add Additional Buyer' window in the MST interface. It features a search form with fields for FIRST NAME, LAST NAME, EMAIL, and PHONE. A 'SEARCH CUSTOMER' button is located below the fields. To the right of the search form, there is a radio button labeled 'Search for Existing Customer or' and a red 'CREATE CUSTOMER' button. A 'CANCEL' button is located at the bottom left of the window.

Notes

Console

Add Additional Buyer



Search Customer

First Name

Last Name

Email

Phone Number

Search for Existing Customer

Search

Cancel

Add Additional BUyer

Enter Customer information and select 'Search Customer' to search for an existing customer. This searches for customers existing in MST only, and does not include searching CRM.

MST

Add Additional Buyer



Search Customer

FIRST NAME

LAST NAME

EMAIL

PHONE

Search for Existing Customer or

CREATE CUSTOMER

SEARCH CUSTOMER

CANCEL

Notes

Console

Add Additional Buyer

Search Customer

First Name
ju

Last Name
addit

Email
Selection

Phone Number
Selection

Search

Search for Existing Customer

The results of the search will display and can be selected.

MST

Add Additional Buyer



Search Customer

1 results

Sort by: Relevance

FIRST NAME
ang

LAST NAME
additional

EMAIL

PHONE

SEARCH CUSTOMER

angela additional additional@toyota.com
MST

CANCEL

CREATE CUSTOMER

Notes

Console

Add Additional Buyer



Search Customer

1 result

Sort by: Relevance

First Name

jul

Last Name

additi

Email

Selection

Phone Number

Selection

Search

July additional
MST additional456@toyota.com

When you select the buyer to add, you will be brought to a screen where you can select the relationship, and the ability to copy any trades associated to the additional buyer.

MST

Add Additional Buyer

Please select a relationship to the primary buyer

Required*

July	additional
additional456@toyota.com	PHONE
2212 S Duff Ave	Ames
COUNTY	IOWA
50010	RELATIONSHIP *

Select trades to copy to primary buyer

Go Back

Add Additional Buyer

Notes

Console

Add Additional Buyer



Please Select a relationship to the primary buyer.

*Required

First Name

July

Last Name

additional

Email

additional456@toyota.com

Phone

Street

2212 S Duff Ave

City

Ames

State

IOWA

ZIP Code

50010

Relationship*

Selection

Select trades to copy to primary buyer

If the check box 'Select Trades to copy to primary buyer' is selected the user will be presented a list of available trades to copy over to the write up. The trades will remain in the status they are in on the original write up.

MST

Copy Additional Buyer Trades

Select which vehicle to copy to the primary buyer

2019 Lexus NX 300

Pricing will be impacted by the addition of trades.

CANCEL

COPY

Notes

Console

Copy Additional Buyer Trades

Select which vehicles to copy to the primary buyer.

- 2019 LEXUS NX 300 5 Door SUV 4X4
- 2021 NISSAN Kicks

Cancel

Copy

If 'Create Customer' is selected, the user will be brought to the Customer's Profile Window with an additional field at the bottom to complete the relationship details.

ADDITIONAL BUYER DETAILS

RELATIONSHIP *

Parent

Spouse

Resides with

Other

ADD CUSTOMER

Notes

When 'Edit Additional Buyer' is selected, users can edit the relationship of the additional buyer, or remove the additional buyer from the write-up.

MST

Please select a relationship to the primary buyer Required*

July	additional
additional456@toyota.com	PHONE
2212 S Duff Ave	Ames
COUNTY	IOWA
50010	Spouse ▼

Remove Additional Buyer Cancel Save Changes

Console

Edit Additional Buyer



First Name	Last Name
July	additional
Email	Phone
additional456@toyota.com	
Street	City
2212 S Duff Ave	Ames
State	ZIP Code
IOWA ▼	50010
Relationship*	
Spouse ▼	

Remove Additional Buyer Cancel Save Changes

Notes

Once the Additional Buyer is added to the write up, it will be listed on the Dashboard page in MST, the Write-Up details page and Customer View in Console. It will also show on the write-up cards on the dashboard grid view in MST, and the Customer Page in Console. Additional Buyer information will be passed along to CRM's, and Credit Applications when applicable.

Bug Fixes & Additional Enhancements

- Minor Bug fixes have also been included

Reminders

REMINDERS

To contact Premier Support

- By email: send a message to PremierCare@toyota.com
- By phone: call 1-877-DLDAILY (1-877-353-2459), choose Option 2