

# MST & CON Release Notes

Build: Sept 5, 2023



The following enhancements will be implemented in the Sept 5<sup>th</sup> MST and Console Release:

## MST Updates

### MST & CRM Address Updates

We are now able in MST to select the appropriate customer address box which brings the CRM lead address information forward into MST to ensure saved customer information is used when creating write-ups without losing any lead information or overwriting address fields in CRM.

When a lead is submitted on SmartPath (MST-C), the customer is only required to submit a zip code without an address.

Lead Submission in MST-C:

LEASE

\$490 /mo. 36 mos. \$4,561 due at signing

12K annual mileage | \$0 security deposit required  
Taxes & Fees included.

\*Required

First Name \*  
Test

Last Name \*  
CRM

Email \*  
test01@crm.com

ZIP \*  
50010

Phone

How can we help?

Preferred Contact Method(s):  
 Email  Text  Call

Submit

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When the customer sets an appointment and visits the dealership, the customer is checked into CRM to initiate the showroom visit. The address is updated as shown in the following CRM example (this will work with any SmartPath integrated CRM):

Example of initial customer record in CRM:

The screenshot shows a CRM record for 'Test Crm' (Customer Number: 3395). The record is categorized as 'Retail' and includes contact information for 'Test Crm' and 'test01@crm.com'. The 'Street Address' is 'Ames, IA 50010 USA'. The 'Desired Vehicle' is 'New 2023 Toyota Tacoma SR, SR5, TRD Sport, TF'. The 'Source' is 'e-Commerce : DealerSite-SP-ConfirmAvailability'. The 'BDC / Sales Status' is 'Active'. The 'Road To Sale' is 'E-commerce'. The 'Contact History' table shows four entries:

Call Direction	Call Type	Number Called	Call Result	Call Notes
Outbound	--	(515)232-8888 - Cell	--	Type Here

Contact Dates	Method	Performed By	Notes
08/30/2023 6:18 AM	e-Commerce Lead HST-SP Showroom	--	Click to view lead details for 2023 Toyota Tacoma SR5
08/30/2023 6:16 AM	ProspectStatus	Qa, Toyota	Sales Manager Assigned: Qa, Toyota
08/30/2023 6:10 AM	Showroom Fresh Up	Qa, Toyota	
08/30/2023 6:10 AM	e-Commerce Lead DealerSite-SP-ConfirmAvailability	--	Click to view lead details for 2023 Toyota 7540 Tacoma SR5

Example of updating and saving address in CRM:

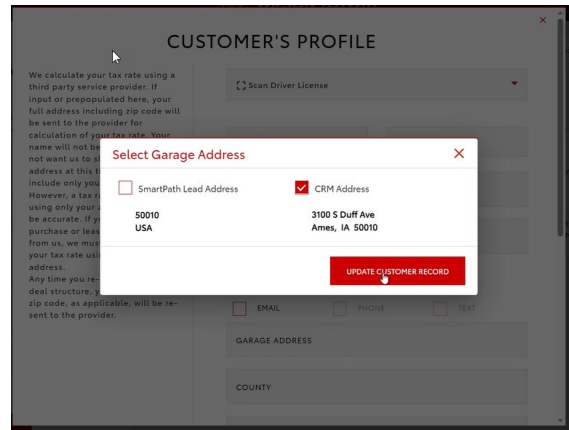
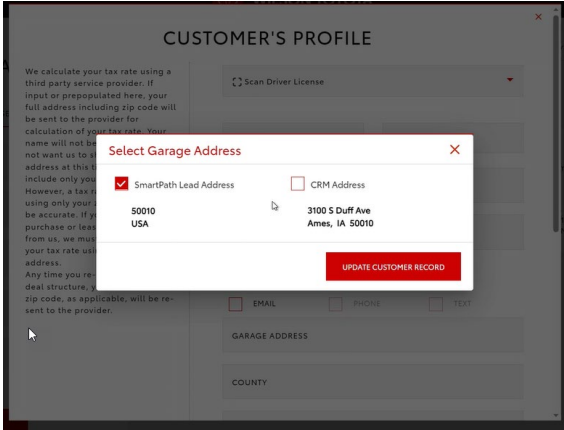
The screenshot shows the same CRM record for 'Test Crm', but the 'Street Address' has been updated to '3100 S Duff Ave'. The 'Contact History' table remains the same as in the previous screenshot.

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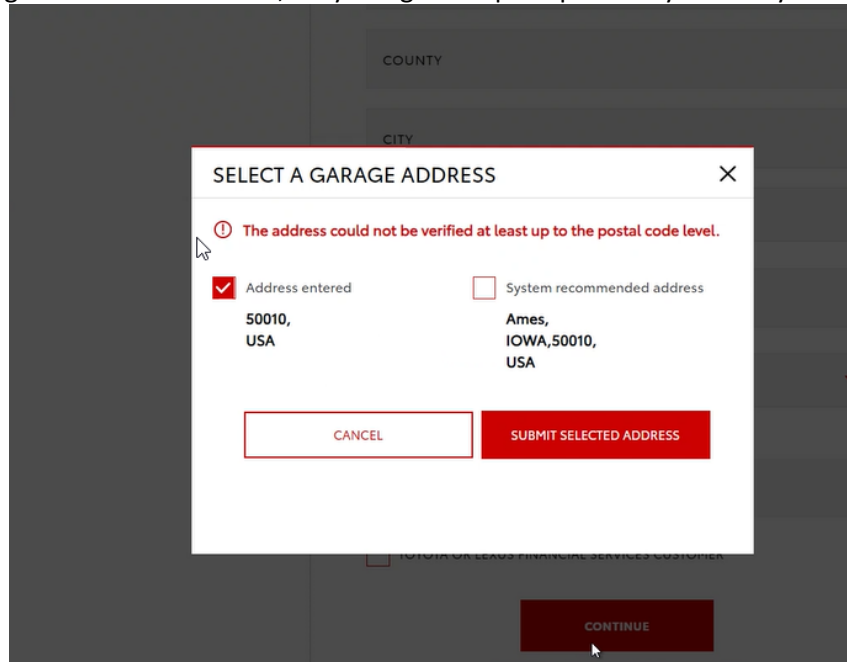


After the address is updated in CRM, when the customer is searched in MST, you will be prompted to select which address to use for the write-up:



You may now select the CRM Address with the updated address and all lead details will remain. The write-up, including all corresponding taxes and fees, will be created based on the address selected. If you choose the SmartPath Lead address, this address will be passed to the CRM and the Customer Record will be updated but it will not delete the address in CRM.

If an address is updated in the CRM on a customer that already has an existing write-up in MST, the user will be prompted to select between continuing with the SmartPath Address or the CRM Address. If they choose to select the existing address in SmartPath, they will get this prompt as they do today:

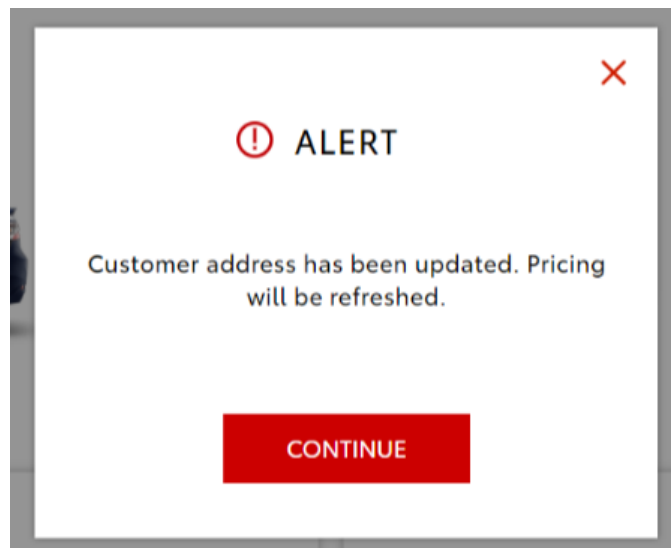
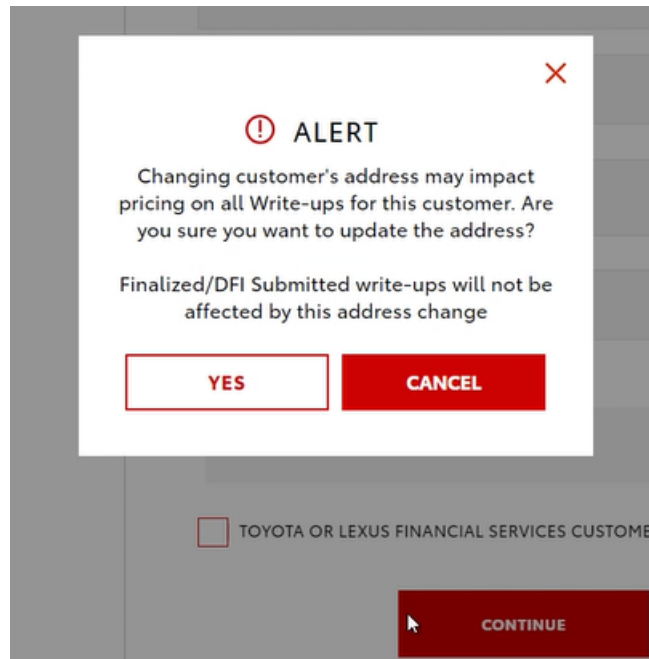


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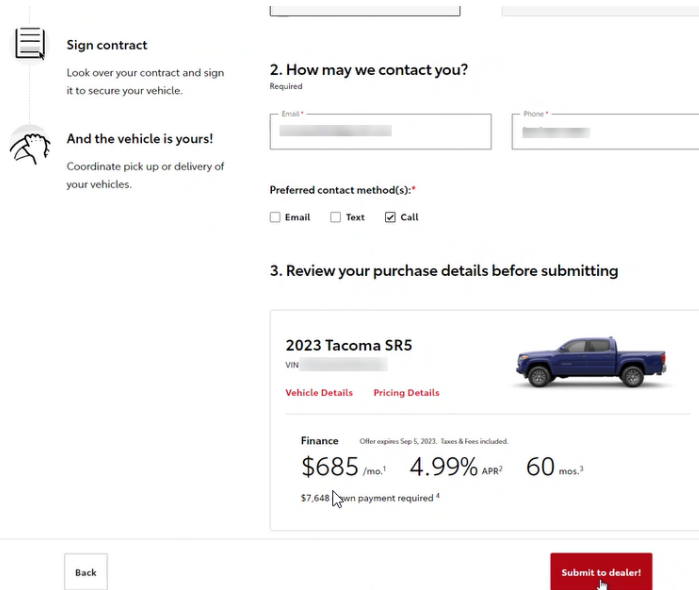
If they choose to select the updated CRM address they will get the following prompts, as any existing write-ups that are not in DFI Submitted or Finalized status will be updated to Initiated status to get proper pricing.



Any lead details and address information will still remain in CRM and on MST, but taxes and fees could change.

## Saved Cost Summary

If a write-up is created from an Online Pricing Lead the Saved Cost Summary is available as a reference to the pricing created and saved On-Line.



The screenshot shows a multi-step form for finalizing a vehicle purchase. It includes sections for signing the contract, providing contact information, and reviewing purchase details for a 2023 Tacoma SR5. The finance details are prominently displayed, showing a monthly payment of \$685, a 4.99% APR, and a 60-month term. A \$7,648 down payment is required. Navigation buttons for 'Back' and 'Submit to dealer!' are visible at the bottom.

**Sign contract**  
Look over your contract and sign it to secure your vehicle.

**And the vehicle is yours!**  
Coordinate pick up or delivery of your vehicles.

**2. How may we contact you?**  
Required

Email\*  Phone\*

Preferred contact method(s):\*

Email  Text  Call

**3. Review your purchase details before submitting**

**2023 Tacoma SR5**  
VIN

Vehicle Details Pricing Details

**Finance** Offer expires Sep 5, 2023. Taxes & Fees included.

**\$685** /mo.<sup>1</sup> **4.99%** APR<sup>2</sup> **60** mos.<sup>3</sup>

\$7,648 down payment required <sup>4</sup>

Back Submit to dealer!

When accessing the Pricing Grid in MST, the payment parameters selected on-line are retained to the write-up. Users can also access the Saved Cost Summary to refer to what was saved on-line.

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**LEASE** Regular MILES/YEAR: 12000

Term	Source	\$0	\$1,500	\$2,000
24 MO.	Special	\$491.08	\$423.92	\$401.53
36 MO.	Special	\$462.65	\$416.32	\$400.87
60 MO.	Standard	\$529.53	\$498.41	\$488.03

**FINANCE** APR<sup>25</sup> 4.99 %

Term	Source	\$0	\$2,000	\$2,500
36 MO.	Special	\$1,130.53	\$1,071.40	\$1,056.61
48 MO.	Special	\$864.55	\$819.33	\$808.03
60 MO.	Special	\$722.84	\$685.03	\$675.58

**2023 Tacoma SR5**

VIN: [REDACTED]  
STOCK: 22672  
MODEL CODE: 7540  
Online: Pending Review

**TAXES & FEES** IMPORTANT DATES

**\$685.03** MONTHLY PAYMENT<sup>30</sup> **4.99%** APR<sup>25</sup> **60 MOS.** TERM LENGTH<sup>23</sup> **\$7,648.00** TOTAL DOWN PAYMENT<sup>13</sup>

**ACCESSORIES** \$249.00 EDIT

Crystal Fusion \$249.00

**PROTECTION-PRODUCTS** \$400.00 EDIT

### Saved Cost Summary

#### Payment Estimation

2023 Tacoma SR5 VIN [REDACTED]

Retail

**\$40,707.00** MSRP **4.99%** Apr<sup>114</sup> **\$685.03** Monthly Payment **60**mos Term Length<sup>112</sup>

<b>Base MSRP</b> <sup>101</sup>	<b>\$37,705.00</b>
<b>Installed Packages &amp; Accessories</b>	<b>\$1,667.00</b>
All-Weather Floor Liners and Door Sill Protectors	\$258.00
TRD Shift Knob - AT	\$140.00
BedStep®	\$300.00
Bed Lighting Kit	\$149.00
Door Edge Guards	\$140.00
Owner's Portfolio	\$0.00

**Additional Enhancements & Bug Fixes**

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- The layout of the Print PDF from the Review Page in MST has been re-designed to optimize spacing and avoid mis-alignments.
- The layout of the Print Payment Selection in Console has been re-designed to optimize spacing and avoid mis-alignments.
- Misc Bug Fixes have been addressed.

## **Reminders**

### **REMINDERS**

To contact Premier Support

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