



# How to Evaluate Dealer Management Systems

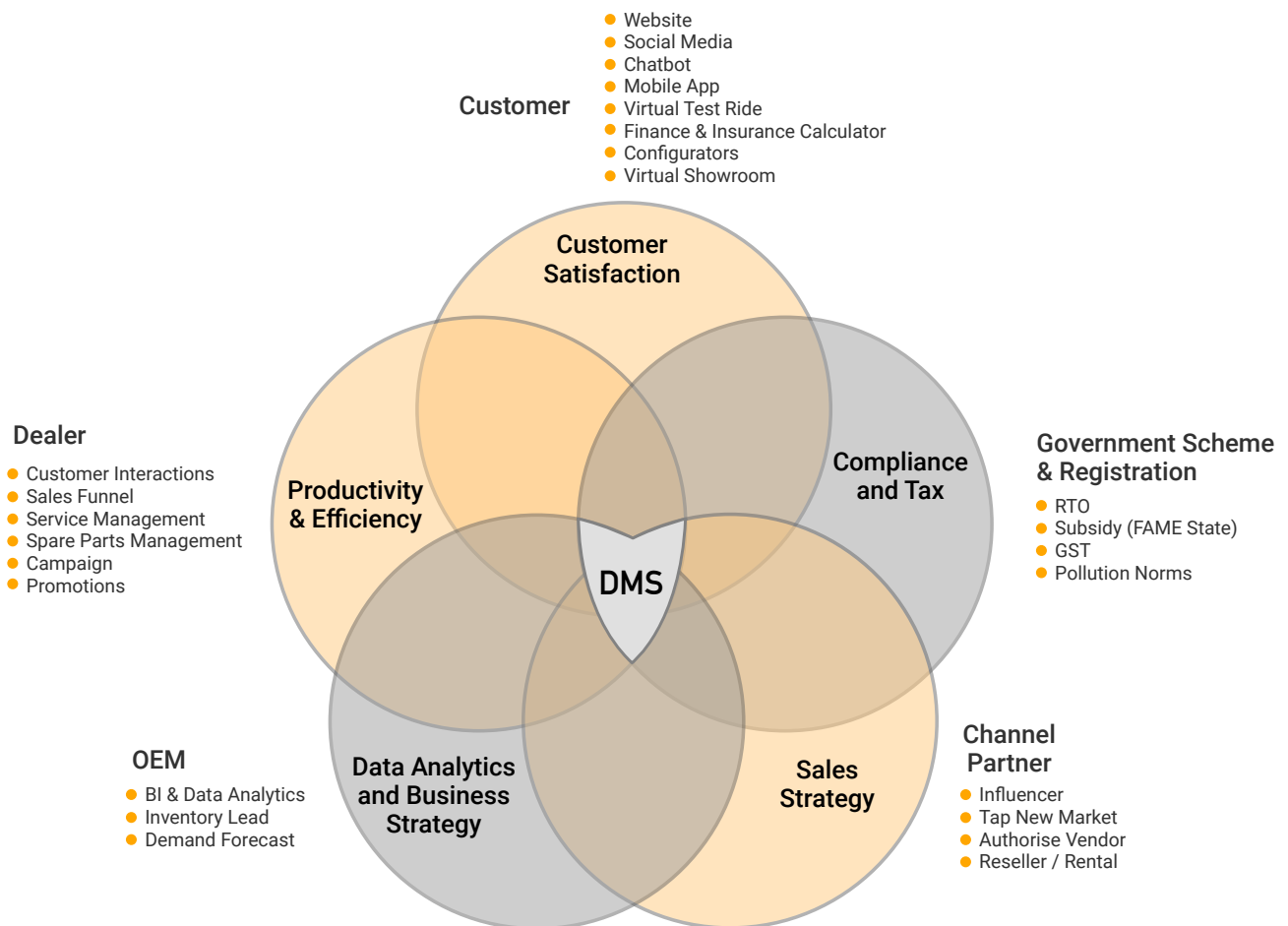
|                                     |       |
|-------------------------------------|-------|
| Dealer management system (DMS)      | pg. 1 |
| General & CRM                       | pg. 2 |
| CRM & Vehicle (Sales & Procurement) | pg. 3 |
| Service & Parts                     | pg. 4 |
| Parts & Finance & E-Invoice         | pg. 5 |
| E-Invoice & Administration          | pg. 6 |



**Dealer management system (DMS)** – has been a common element of automotive manufactures and dealership operations for many years; with the digital transformation era in place, the current role of DMS within the manufacturer and dealership technology ecosystem is evolving, making it one of the top strategic technology investments that today's manufacturers and dealers are doing.



Let's evaluate several vital trends impacting the automotive industry that reflect the importance of effectively utilising the power of data and enhancing the customer experience. As the next step, we can look at the DMS and compare how Excellon DMS visualises the evolution of the DMS's traditional role within the upcoming dealer tech ecosystem.

As one of the industry leaders for over two decades, Excellon Software takes responsibility for driving and shaping the future of the dealership ecosystem. This checklist will get you thinking about where the industry is heading and how to create an improved ecosystem for the benefit of all of its members – end consumers, dealers, and OEMs.







## Dealer Management System Evaluation Checklist

| Module   | Category                                   | Features   | Excellon DMS | Vendor 1 | Vendor 2 |
|--|--|--|--------------|----------|----------|
| <br><b>General</b> | <b>Platform</b>                            | Cloud Based SaaS Platform                              | ✓            |          |          |
|  |  | Microservice based Architecture                        | ✓            |          |          |
|  |  | E-Com and Mobile Apps as Plug-in                       | ✓            |          |          |
|  | <b>Powerful Reports</b>                    | Flexible Drill-down Reports and Statements             | ✓            |          |          |
|  |  | Built-in BI Dealer Analytics                           | ✓            |          |          |
|  |  | Built-in BI Global Analytics                           | ✓            |          |          |
|  |  | Persona based Dealer Dashboards                        | ✓            |          |          |
|  |  | Persona based Global Dashboards                        | ✓            |          |          |
|  |  | Dedicated Head Office Reports, Dashboard and Analytics | ✓            |          |          |
|  | <b>Flexibility</b>                         | Local and Global Masters                               | ✓            |          |          |
|  |  | Customisable Form and Print Layouts                    | ✓            |          |          |
|  |  | Customisable Dashboards                                | ✓            |          |          |
|  |  | Configurable Business Rules                            | ✓            |          |          |
|  |  | User Roles based Access Control                        | ✓            |          |          |
|  |  | Configurable Document Approval Matrix (Hold Coded)     | ✓            |          |          |
|  | System Agents and Schedules for Automation | ✓  |              |          |          |
|  | <b>Compliance</b>                          | GST Ready with In-built E-Invoice and E-Waybills       | ✓            |          |          |
| <br><b>CRM</b>   | <b>Lead Management</b>                     | Capture Social Media Leads                             | ✓            |          |          |
|  |  | Capture Website Leads                                  | ✓            |          |          |
|  |  | Capture Call Centre Leads                              | ✓            |          |          |
|  |  | Lead Classification & Scoring based on Activities      | ✓            |          |          |
|  |  | Smart Lead Routing to Dealership                       | ✓            |          |          |
|  |  | Source Based Lead Analysis                             | ✓            |          |          |
|  |  | Test Ride for Leads                                    | ✓            |          |          |
|  |  | Quotations   | ✓            |          |          |





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|--|--------------------------------------|--|--------------------|----------|----------|
| <br><b>CRM</b>       | <b>Customer Engagement</b>           | Configurable Schemes by OEM                            | ✓                  |          |          |
|  |                                      | Local Dealer Schemes                                   | ✓                  |          |          |
|  |                                      | Feedback Management                                    | ✓                  |          |          |
|  |                                      | Call Centre Integration/Cloud Telephony                | ✓                  |          |          |
|  |                                      | Built-in BI Dealer Analytics                           | ✓                  |          |          |
|  |                                      | Customer Engagement and Marketing Automation           | ✓                  |          |          |
|  | <b>Customer Complaint Management</b> | Customer Complaint Management                          | ✓                  |          |          |
|  |                                      | Escalation Matrix for Customer Issues                  | ✓                  |          |          |
|  |                                      | Dedicated Head Office Reports, Dashboard and Analytics | ✓                  |          |          |
|  |                                      | <b>Customer 360°</b>                                   | Customer 360° View | ✓        |          |
| <br><b>Vehicle</b> | <b>Sales Management</b>              | Vehicle Booking and Approval (Bulk, One-by-One)        | ✓                  |          |          |
|  |                                      | Vehicle Allocation (FIFO, Manual)                      | ✓                  |          |          |
|  |                                      | Multi Branch Aged Stock Visibility for Allocation      | ✓                  |          |          |
|  |                                      | Customer KYC   | ✓                  |          |          |
|  |                                      | Vehicle Sale Invoice with Accessories                  | ✓                  |          |          |
|  |                                      | Vehicle Quality Check                                  | ✓                  |          |          |
|  | <b>Planning</b>                      | Sales Targets for Sales Person(s)                      | ✓                  |          |          |
|  |                                      | Sales Incentives and Commissions                       | ✓                  |          |          |
|  |                                      | Demand Planning  | ✓                  |          |          |
|  |                                      | Sales Forecasting                                      | ✓                  |          |          |
|  |                                      | MSL based Auto Ordering                                | ✓                  |          |          |
|  | <b>Inventory Management</b>          | Dealer to Dealer Transfer                              | ✓                  |          |          |
|  |                                      | Branch to Branch Transfer                              | ✓                  |          |          |
|  |                                      | Branch Wise Inventory Visibility                       | ✓                  |          |          |
| <b>Procurement</b>   | Vehicle Procurement at Dealership    | ✓  |                    |          |          |






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|---|---|---|--------------|----------|----------|
| <br><b>Service</b> | <b>Engagement</b>                       | Feedback Management                                     | ✓            |          |          |
|   | <b>Vehicle Service</b>                  | Complete Vehicle Service History                        | ✓            |          |          |
|   |   | Online Service Appointment and Customer Voice           | ✓            |          |          |
|   |   | Service Estimation                                      | ✓            |          |          |
|   |   | Service Job card  | ✓            |          |          |
|   |   | Parts Requisition and Consumption During Service        | ✓            |          |          |
|   |   | Outside Work Purchase Order                             | ✓            |          |          |
|   |   | Split Invoices/Ratio Billing                            | ✓            |          |          |
|   |   | Mechanic and Bay Suggestion based on Customer Complaint | ✓            |          |          |
|   | <b>Warranty &amp; Claims Management</b> | Vehicle Warranty Management                             | ✓            |          |          |
|   |   | Sale Service Contracts/AMC Contracts                    | ✓            |          |          |
|   |   | Service Packages  | ✓            |          |          |
|   |   | Service/Labour/Parts Claim                              | ✓            |          |          |
|   |   | Free Service/Warranty Claims Reconcile                  | ✓            |          |          |
|   | <b>Planning</b>                         | Service Reminder (Due/Upcoming)                         | ✓            |          |          |
|   |   | Workshop Planning                                       | ✓            |          |          |
|   |   | Service Target, Incentives and Commissions              | ✓            |          |          |
|   |   | Repeat Fault Tracking                                   | ✓            |          |          |
|   | Retrofits Management                    | ✓   |              |          |          |
|   | Service Feedback Management             | ✓   |              |          |          |
| <br><b>Parts</b>  | <b>Parts Sales &amp; Consumption</b>    | OTC Parts Sales   | ✓            |          |          |
|   |   | Parts Sales   | ✓            |          |          |
|   |   | Parts Issue and Return Against Job Card                 | ✓            |          |          |
|   | <b>Parts Procurement</b>                | Parts Local Procurement                                 | ✓            |          |          |





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| Module   | Category                      | Features   | Excellon DMS | Vendor 1 | Vendor 2 |
|--|-------------------------------|--|--------------|----------|----------|
| <br><b>Parts</b>       |                               | Parts Procurement from OEM                         | ✓            |          |          |
|  |                               | Claims for Procured Parts                          | ✓            |          |          |
|  | <b>Inventory</b>              | Parts Inventory Management                         | ✓            |          |          |
|  |                               | Dealer to Dealer / Branch to Branch Stock Transfer | ✓            |          |          |
|  | <b>Planning</b>               | Parts FSN and ABC Classification                   | ✓            |          |          |
|  |                               | Auto Ordering Based on MSL (Minimum Stock Levels)  | ✓            |          |          |
|  |                               | Parts Demand Planning and Sales Forecasting        | ✓            |          |          |
|  |                               | Sales Targets, Incentives and Commissions          | ✓            |          |          |
|  |                               | Parts Sale-One-Buy-One                             | ✓            |          |          |
|  |                               | Auto Order Replenishments                          | ✓            |          |          |
| <br><b>Finance</b>   | <b>Vouchers</b>               | Receipt(s)   | ✓            |          |          |
|  |                               | Payments(s)  | ✓            |          |          |
|  |                               | Contra/Journal Vouchers                            | ✓            |          |          |
|  |                               | Debit Note/Credit Note                             | ✓            |          |          |
|  | <b>Reports and Statements</b> | Statement of Accounts                              | ✓            |          |          |
|  |                               | Audit Reports                                      | ✓            |          |          |
|  |                               | Budgeting and Targets                              | ✓            |          |          |
|  |                               | Statutory Reports                                  | ✓            |          |          |
|  |                               | Profit and Loss Account & Balance sheet            | ✓            |          |          |
|  |                               | GST Reports  | ✓            |          |          |
|  | GST Returns                   | ✓  |              |          |          |
| <b>Data Export</b>   | Tally Export                  | ✓  |              |          |          |
| <br><b>E-Invoice</b> | <b>Transaction</b>            | Generate IRN (One-by-One & Bulk)                   | ✓            |          |          |
|  |                               | Cancel IRN   | ✓            |          |          |
|  |                               | Generate and Cancel E-Way Bill                     | ✓            |          |          |



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|---|--|---|---------------------------|----------|----------|
| <br><b>E-Invoice</b>        | <b>Reports</b>                                       | E-Invoice Statement                       | ✓                         |          |          |
|   |  | IRN Processing Reports                    | ✓                         |          |          |
|   |  | IRN & E-Way Bill Report                   | ✓                         |          |          |
|   |  | E-Invoice Dashboard                       | ✓                         |          |          |
| <br><b>Administration</b> | <b>Configurations</b>                                | Tax Compliance and Currency               | ✓                         |          |          |
|   |  | Business Rules                            | ✓                         |          |          |
|   |  | Approval Matrix                           | ✓                         |          |          |
|   |  | Form and Print Layout                     | ✓                         |          |          |
|   |  | User Localisation                         | ✓                         |          |          |
|   |  | User Role and Access Permissions          | ✓                         |          |          |
|   |  | Document Level Configuration              | ✓                         |          |          |
|   |  | Pick list and Check Lists                 | ✓                         |          |          |
|   |  | Notification Templates and Trigger Action | ✓                         |          |          |
|   |  | <b>Masters &amp; Management</b>           | Vehicle and Parts Masters | ✓        |          |
|   | Services and Repair Types                            |   | ✓                         |          |          |
|   | Service and Warranty Contracts                       |   | ✓                         |          |          |
|   | Assets Management                                    |   | ✓                         |          |          |
|   | Suppliers Management                                 |   | ✓                         |          |          |
|   | Item Group, Item Variations, Customer Groups etc.    |   | ✓                         |          |          |
|   | Discounts and Schemes                                |   | ✓                         |          |          |
|   | Item Pricing and Service Pricing                     |   | ✓                         |          |          |
|   | Bay, Skill, Complaint and Service Advisor Management |   | ✓                         |          |          |
|   | Dealer Company, Branch, Business Unit                |   | ✓                         |          |          |
|   | Chart of Accounts and Account Categories             | ✓   |                           |          |          |
| Tax Configurations  | ✓  |   |                           |          |          |