

1on1 Sales Manager Tool

User Guide

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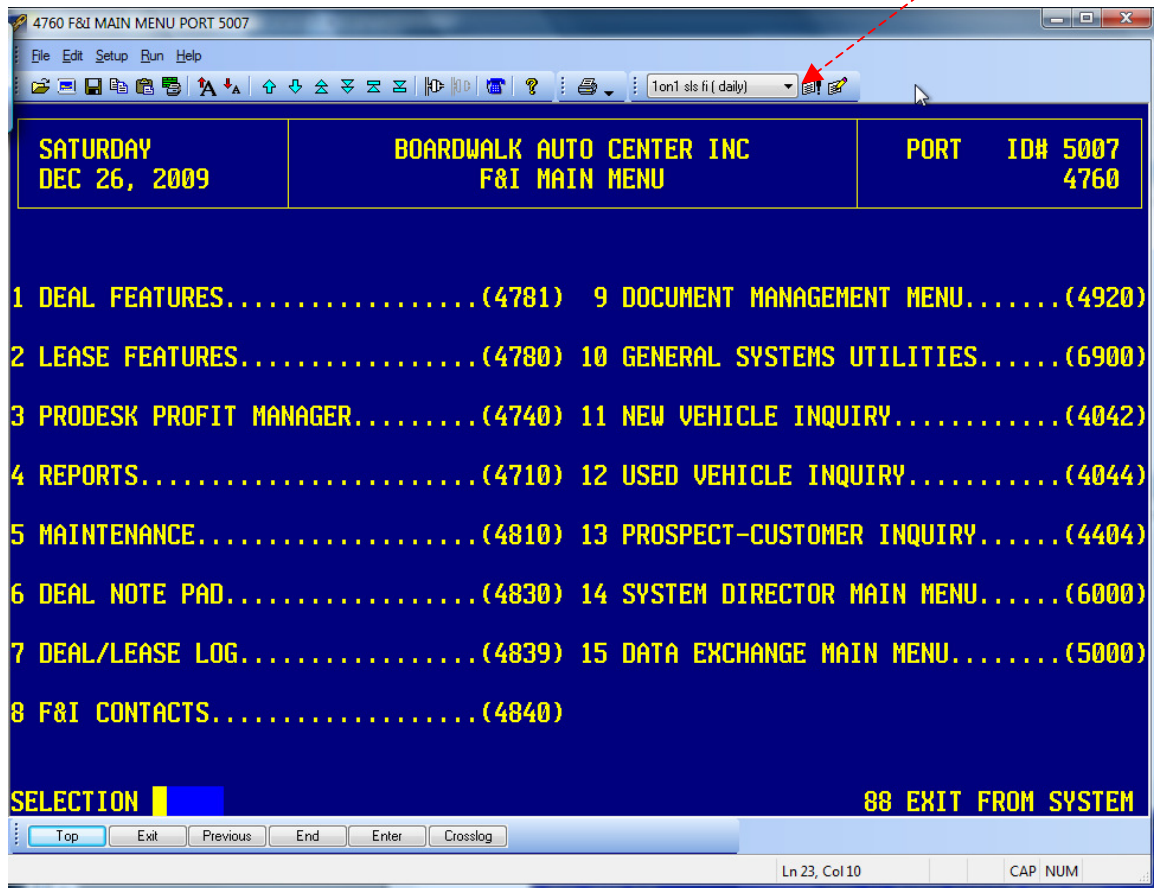
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Downloading Data

Before getting started, please check your ERA screen to verify that you have a Yellow Pencil at the top of the screen. If not, then please go to page 5 for instructions (it only takes 2 seconds to do this) before proceeding.

Log into your ERA [F&I area](#) for the appropriate dealership.

Simply click the pull-down and choose “1on1sls fi (daily)”, then click the [black explanation mark](#).



Wait for the download to finish (typically between 20 to 60 seconds).

Note: if you are pulling data from MULTIPLE servers, please contact us and we will set up your specs and your queries to handle MULTIPLE servers.

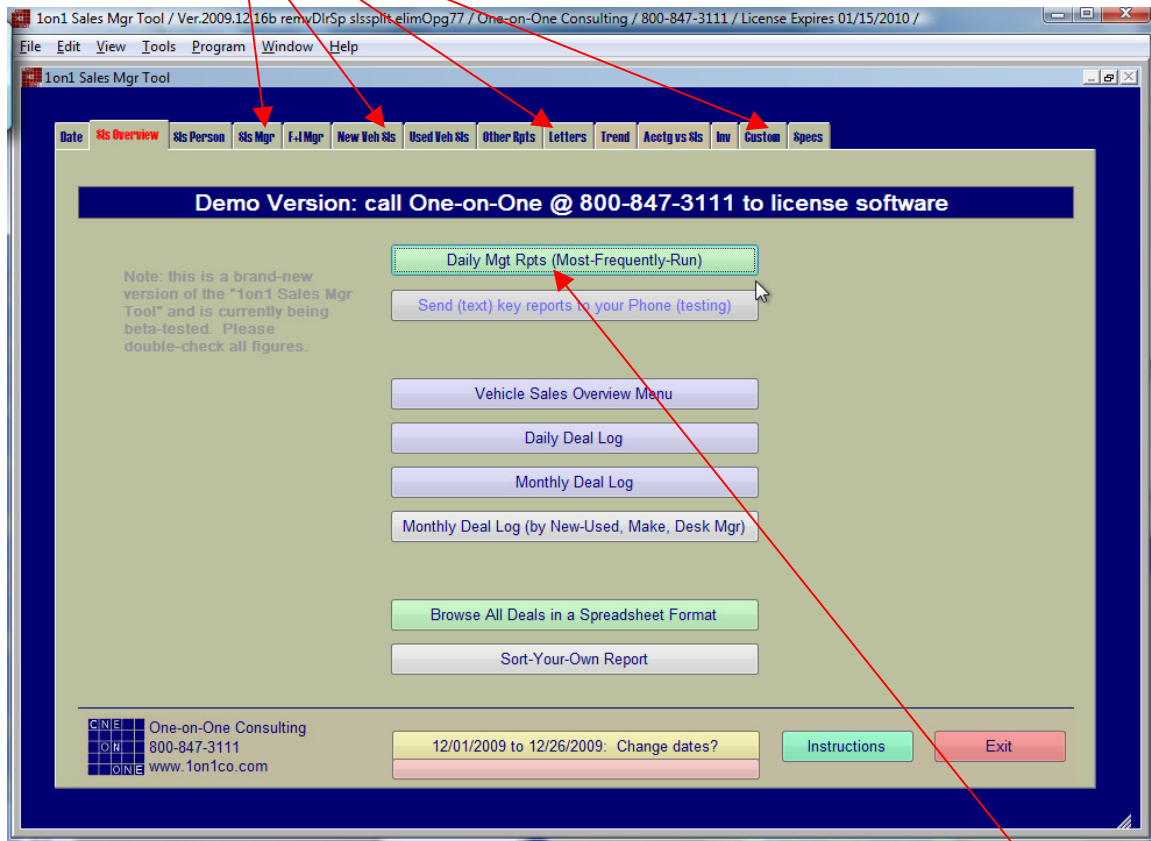
Using your “1on1 Sales Mgr Tool”

Make sure that you have downloaded data before proceeding (see previous section)

Open the “1on1 Sales Mgr Tool” icon (on your desktop)
Click “Login” to agree to the license agreement

The following screen will open.

Click on the desired group of reports (see the tabs at the top of the screen).



Since there are so many reports, many people will simply click the button, called “Daily Mgt Rpts (Most-Frequently-Run)”. This option uses our “1-click” technology to display the most-commonly-run reports with one simple click. Or explore your options by clicking the different tabs at the top of the screen. Just click the ones you want (printing is optional).

By default, the system will assume that you want the current month’s data, unless it is within the first 4 days of the month, then it is smart enough to assume that you then want the previous month’s data. At any time, you can click on the **yellow button** to change date ranges if you want. By default, the system will display data for the past 2 years, but that can easily be changed to meet your needs.

Click on the **red EXIT button** when finished.

We do our best to continually improve this tool. Please let us know if you have any suggestions.

Hardware and Software Requirements

Using the "1on1 Sales Mgr Tool" requires the following:

- A software license for our 1on1 software (our software is licensed per dealership and allows for installation on multiple computers, provided they are installed and used by the particular licensing dealership. Dealerships with multiple stores require a separate license fee for each store and/or branch. If you have questions, please contact us at 800-847-3111).
- A personal computer running Microsoft Windows 7, Windows Vista, XP, 2000.
- Reynolds Eraccess SERVER version 6 or higher.
- Reynolds Eraccess CLIENT.
- The person using the tool must have a Reynolds USER ID, with the following:
 - Access to the **F&I area** (certain reports may also require access to the **Accounting area**)
 - Access to the following program executables: **7601**, **7602** and **4760**.
- Access to the internet: specifically our website: www.1on1co.com (to download updates).
- The person installing the "1on1 Sales Mgr Tool" must have installation privileges (contact your system administrator for assistance, if applicable).
- System Administrator: If applicable, the "C:\program files\1on1\1on1fi\tables" file folder will need to have "Read/Write" permissions (important for users of Windows 7 and Windows Vista computers, or if the Administrator has specifically restricted this folder).

Installation Procedure

- If loading updates, close OUT of the 1on1 Sales Mgr Tool before proceeding.
- Go to our website at: www.1on1co.com
- Click on "Customer Login" (left-hand side of screen)
- Enter UserName (small letters; this is provided upon payment of license fee)
- Enter Password (small letters; this is provided upon payment of license fee)
- Click on the appropriate button (note: for new installations, it is always necessary to click "Update Expiration Date" after you install the software for the first time):
 - "Install for the First Time - SALES Mgr Tool"
 - or-
 - "Enhancements - SALES Mgr Tool"
 - or-
 - "Update Expiration Date"
- A window should appear that says: "Run Save Cancel".
- Click "Run". It should take about 2 minutes to download the program or enhancements, but only 2 seconds for the option to "Update Expiration Date".
- Next, you should receive a message that the publisher could not be verified ... It is okay to click "Run" in this instance (Microsoft does not recognize small publishers like us).
- Note: If you clicked "Install for the First Time - SALES Mgr Tool", then you will also need to click on the 3rd button on our website called "Expiration Date Update - SALES Mgr Tool"

Setting up Eraccess “1on1” Shortcut Icons

If you do NOT already have the “Queries” shortcut on your Eraccess screen, you will want to add the shortcut icon to make it easy to download your data:

Right-click with the right mouse button anywhere in an open gray area (above the blue section of the screen).

After you right-click, you will see a number of options appear. Left-click on the word “Queries”.

You should now see the “Queries” icons along with a “pull-down” bar (as displayed in the example here).

Save this shortcut by clicking on “File” then “Save As”. Make sure “Session1” is selected. Click “Save”, then “Yes” to replace the file with the changes.

This should be done for every person using the 1on1 Sales Mgr Tool.

That was pretty easy, wasn't it?

