

Checklist for Evaluating Dealership Management Systems

“Productivity is never an accident. It is always the result of a commitment to excellence, intelligent planning, and focused effort.” - Paul J. Meyer



System Overview

- Does the system connect and give me visibility into all my departments (parts, service, etc.) and business processes?
- Can the system handle the growth of my business and support multiple locations?
- Does the system have industry-specific integrations?
- Are there data conversion and import options? Can I transfer data from my old system to the new one?



Inventory & Parts Management

- Can the system update manufacturer price lists automatically?
- Can the system help me manage inventory and track stock levels based on seasonality?
- Can the system automatically generate purchase orders based on inventory levels and back orders?
- Can the system produce reports that show me which products are selling well and which ones are not?
- Can the system sync with my website for inventory and parts management?
- Does the system allow me to view and transfer inventory between multiple locations?



Sales Management

- Can the system track sales orders and help manage the sales process?
- Does the system track sales deals from start to finish, so we can see how well we're doing?
- Does the system have robust quoting to manage all products and services?
- Can the system create sales reports to help me understand which salespeople are performing well and which products are selling the most?
- Can I easily create and sell custom order units with standard features as well as manufacturer and dealer-installed options when working with customers?
- Does the system have a good ability to accurately track the true cost of a unit, including preparation charges, internal work orders, and overhead allocation?
- Does the system allow our salespeople to instantly access up-to-date customer data and inventory through their smartphone or tablet anywhere, anytime?



Customer Relationship Management

- Can the system track customer information and help manage customer relationships?
- Does the system have the ability to create marketing campaigns and track their success?
- Can the system integrate with my website to capture leads automatically?
- Does the CRM give visibility into bottlenecks in the sales process?
- Is there a way to compare sales rep activity to coach underperformers?
- Is there integrated texting and email functionality?
- Does the system automatically measure customer satisfaction after a sale (such as Net Promoter Score or NPS)?
- Does the system give a clear view of how much money we could make from future sales?



Service Management

- Can the system help me manage service appointments and track repairs?
- Can the system create service reports to help me understand which technicians are performing well and which products require the most repairs?
- Can the system remind customers to come back for service?
- Does the system give me enough reporting information to manage warranty claims and reconciliations?
- Does the system give me a clear view of how much money we could make from future work orders?
- Does the system track work order cycle time so I always know how many orders are still waiting to be completed?



Reporting and Analytics

- Can the system generate reports on all aspects of the dealership, including sales, inventory, and service?
- Can the system provide real-time data on key performance indicators (KPIs)?
- Does the system have dashboards that automatically update and can be displayed on a screen on the wall in key areas of the dealership?
- Does the system allow for the customization of reports and dashboards?
- Does the system automatically email key reports to managers so metrics do not go unnoticed?



Accounting and Financial Management

- Does the system have built-in accounting, or can it integrate with my accounting software to streamline financial management?
- Does the system offer multi-location reporting?
- Does the system allow for easy viewing and access to the profitability of a particular department, product category, or product line?
- Does the system provide detailed financial reporting and tracking of key financial metrics?
- Can the system manage accounts receivable and accounts payable?
- Does the system have floor plan reporting?
- Can the system easily create operating budgets and track actual performance and variances?



Mobile Functionality

- Does the system have a mobile application that allows my team to perform key daily tasks (service writer, technician, salespeople, etc.)?
- Can the system accept credit card payments or capture a customer's signature on a mobile device?
- Can techs use their smartphone or tablet to clock in and out of labor lines, take relevant photos, and provide cause & correction without going back and forth to a computer?
- Does the system offer mobile inventory management?
- Does the system offer notifications that are visible on mobile devices and smartwatches?
- Does the system offer mobile texting and video calling?
- Does the system offer text and email payment options for customers?



Network & Security Infrastructure

- Does the system provide adequate security measures to protect sensitive data?
- Can user access be controlled and limited based on job roles?
- Does the system provide a log of user activity and changes made to data?
- Is the system hosted in the Cloud for secure access from anywhere?



Support and Training

- Does the system provide adequate training and support resources that fit the needs of my dealership, such as video training resources?
- Are there live trainers who can do 1-1 training online and/or in-person?
- Can the system be customized to fit the unique needs of my dealership?
- Is support available during the days and hours I need it, including weekends?
- Does the system provider have various methods for submitting and tracking a support incident, including telephone, email, web, chat, etc.?
- Are the training programs and resources provided by the system provider cost-effective?
- Do the system provider's trainers have real-world knowledge and dealership experience?



Pricing and Cost

- Is the pricing structure transparent and suitable for my needs?
- Is the quoting clearly laid out so I can compare it with other options?
- Are there financing options available? Are there savings to be had for paying quarterly or annually versus monthly?
- Is there a long-term contract? If so, is it auto-renewing?

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