
AUTOPROMOTOR · USER GUIDE

Leads and Enquiries

A quick guide to managing website enquiries and leads in Autopromotor, covering everything in this first release.

What is in this guide

Leads and Enquiries brings every website enquiry, and any leads you add yourself, into one place. This guide walks through each part of the feature so your team can get set up quickly.

01 The enquiry list

02 Sorting and filtering

03 Adding a lead yourself

04 The enquiry and lead detail page

05 Linking a lead to a sale, reservation or purchase

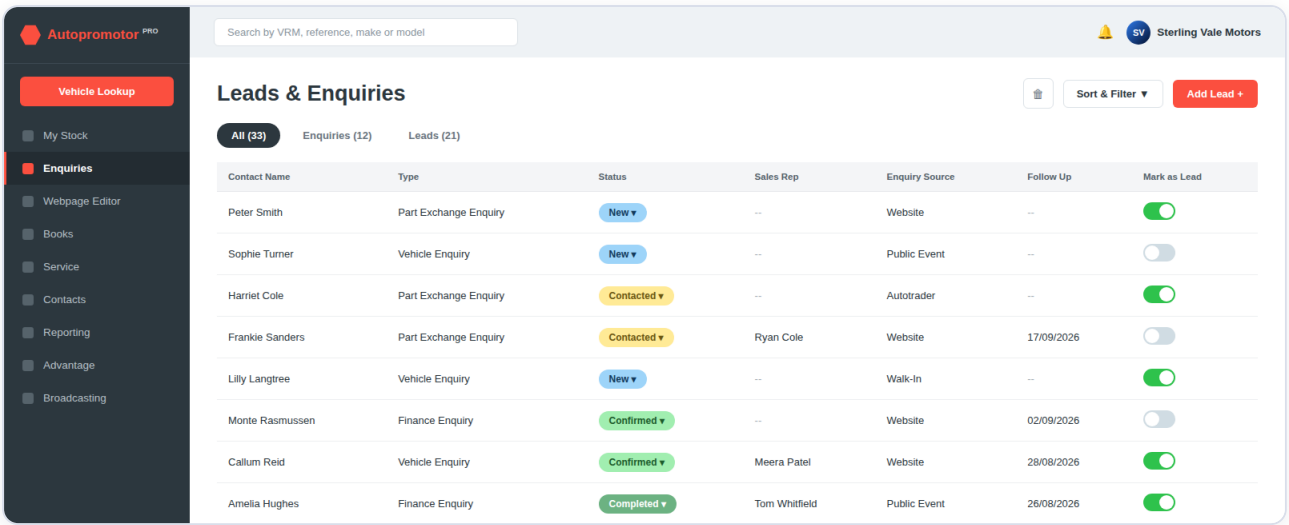
06 What is coming next

Good to know: this guide covers phase 1.0 of Leads and Enquiries. A few things, like linking back to a lead from a sale or reservation, are planned for a later phase once those pages get their new look.

SECTION 1

The enquiry list

This is where every enquiry and lead lives, in one list, newest first.



The enquiry list, showing the All, Enquiries and Leads tabs, plus the Sort & Filter and Add Lead actions. Names and dealer details shown are for illustration only.

Good to know: what you see depends on your user type. Managers see every enquiry and lead. Staff users only see the ones assigned to them.

Three tabs

You will land on the **All** tab by default. From there you can switch to:

- **Enquiries**, which shows anything that has not been marked as a lead yet
- **Leads**, which shows only the ones you have marked as a lead

What each row shows

Column	What it shows
Contact name	First and last name of the person who got in touch
Type	The type of enquiry. Captured automatically from the website form, or set by you for anything added manually
Status	Where the enquiry is in its journey, see below
Sales rep	Blank until someone is assigned from the detail page
Enquiry source	Set to Website automatically for online enquiries, or set by you when adding a lead
Follow up date	Blank until a follow up date is set from the detail page

Statuses explained

New

Contacted

Confirmed

Completed

Archived

Lost Sale

Every enquiry starts out as **New**. Move it through the other statuses as you work it, so everyone on your team can see where things stand at a glance.

Archived sends the enquiry to the bin. **Confirmed** and **Completed** both prompt you to link the lead to a sale, reservation or purchase, see section 5. You cannot set a status back to **New** once it has moved on.

Marking as a lead

You can mark any enquiry as a lead from the list. It will not change anything else about it today, but it feeds into reporting we are adding in a future release.

SECTION 2

Sorting and filtering

Find what you are looking for quickly, whether that is your newest enquiries or a specific customer.

Sort

The list opens sorted by date, newest first. You can apply one other sort at a time, in ascending or descending order, by:

- Contact name
- Type
- Status
- Enquiry source
- Follow up date
- Marked as lead

Filter

You can filter by date, using a set range or your own custom range:

All Time

Last 7 Days

Last 30 Days

Last 90 Days

This Month

This Year

Custom Range

You can also filter by status and by enquiry source. Both let you select more than one option at a time, so you could, for example, view everything that is either Contacted or Confirmed in one go.

Good to know: sorts and filters are not saved. If you leave the enquiry list page, they will reset back to the default the next time you come back.

SECTION 3

Adding a lead yourself

Not every lead comes through your website. Use Add Lead to log a walk in, a phone call, or anything else picked up offline.

Autopromotor PRO

Search by VRM, reference, make or model

Sterling Vale Motors

Vehicle Lookup

My Stock

Enquiries

Webpage Editor

Books

Service

Contacts

Reporting

Advantage

Broadcasting

Leads & Enquiries

Custom Lead

Select Enquiry Source:

Enquiry Source*

Select Enquiry Source

Enquiry Type*

Select Type

Vehicle Enquiry

Finance Enquiry

Test Drive Enquiry

Part Exchange Enquiry

General Enquiry

Service Enquiry

Vehicle Sourcing Enquiry

Newsletter Signup Enquiry

+ Add

+ Add

Create Lead

Picking an enquiry source and enquiry type when adding a lead. Dealer details shown are for illustration only.

What you will need

- **Enquiry source**, required. Pick from the existing list, or type a new one and it will be saved for next time
- **Enquiry type**, required. What kind of enquiry this is, for example Vehicle, Finance, Test Drive or Part Exchange
- **Vehicle of interest**, optional. Choose from your current stock
- **Part exchange details**, optional. Add these if the customer has mentioned a part exchange
- **Customer details**. Only first and last name are required, the rest is optional

Good to know: once you save, you will land straight on the lead's detail page, ready to add notes or assign a sales rep. It is automatically marked as a lead and shows up straight away on the Leads tab.

Adding a vehicle of interest

Search your stock by VRM, reference, make or model, then select the vehicle and add it to the lead. If the vehicle is not in stock, you can note it down instead rather than add it here.

The screenshot shows the 'Add Vehicle of Interest' modal in the Autopromotor system. The modal has a search bar at the top with 'BD19' entered. Below the search bar, a message states: 'Vehicle not in stock? Add it as a lead note'. A table displays vehicle details for a Ford Focus. The table has columns: Image, Stock Ref, VRM, Status, Make, Model, Colour, Year, Transm., Fuel, and Mileage. The row shows a car icon, Stock Ref 10842, VRM BD19 KLM, Status Active, Make Ford, Model Focus, Colour (grey dot), Year 2019, Transm. Manual, Fuel Petrol, and Mileage 41,250. At the bottom are 'Cancel' and 'Add' buttons.

Image	Stock Ref	VRM	Status	Make	Model	Colour	Year	Transm.	Fuel	Mileage
	10842	BD19 KLM	Active	Ford	Focus	●	2019	Manual	Petrol	41,250

Searching stock to add a vehicle of interest. Dealer and stock details shown are for illustration only.

Adding part exchange details

Enter the VRM, mileage and condition, then use VRM Lookup to pull in the full vehicle details automatically. You can also add a vehicle without a VRM if needed.

The screenshot shows the 'Part Exchange Vehicle' modal. It includes a 'Provide Autotrader Valuation*' dropdown set to 'Yes'. Under 'Vehicle Information', there are fields for 'VRM' (MK67 GHT), 'Mileage*' (58400), and 'Condition*' (Good). At the bottom right are buttons for 'I don't have a VRM' and 'VRM Lookup'. At the bottom are 'Cancel' and 'Add' buttons.

Adding a part exchange vehicle. Dealer and vehicle details shown are for illustration only.

SECTION 4

The enquiry and lead detail page

Open any row from the list, or a notification, to see the full picture and manage it from one place.

The screenshot shows the Autopromotor PRO interface. On the left is a dark sidebar with navigation options: Vehicle Lookup, My Stock, Enquiries (selected), Webpage Editor, Books, Service, Contacts, Reporting, Advantage, and Broadcasting. The main header includes a search bar, a notification bell, and the user 'SV Sterling Vale Motors'. The page title is 'Leads & Enquiries' with a sub-header 'Peter Smith'. The enquiry date is '04/09/26 (today)' with 'New' and 'Mark as Enquiry' buttons. The 'Notes' section shows a note from 'Erin Ali' dated '04/09/26 @ 12:07' with the text 'I spoke with Mr Smith and he is coming in on Saturday to test drive the vehicle.' and 'Edit'/'Delete' options. The 'Lead Information' section includes a table for 'Vehicle of Interest' (2012 Volkswagen Up) with fields for Registration Number (GY12YFE), Stock Number (10626), and Vehicle Price (£2,980). Below this is a 'Part Exchange Vehicle' section for a 'Vauxhall Astra' with fields for VRM (LV62CKK), Mileage (93,214), Condition (Excellent), Make (Vauxhall), Model (Astra), Derivative (1.7 CDTi Active Hatchback 5dr Diesel Manual Euro 5 (110 ps)), Colour (White), and Photos (three images of the car). The bottom section shows 'Enquiry Date' (04/09/2026, 11:04am), 'Subject' (Part Exchange), 'Message' ('Other than slight wear and tear on the interior, the vehicle is in perfect condition.'), 'Marketing Emails' (Yes), and 'Page Visited' (2012 Volkswagen Up 1.0 Move up, Hatchback 3dr Petrol Manual).

The enquiry detail page, showing notes and lead information. Names, vehicle and dealer details shown are for illustration only.

What you will see

Everything the customer submitted online: their subject and message, and the page they were browsing. Where it applies, you will also see the vehicle they enquired about, with its registration, stock number and price, plus details of any vehicle they want to part exchange, including its condition, mileage and photos.

What you can do

- **Assign a sales rep.** They will get a notification once assigned
- **Set a follow up date.** This then shows on the enquiry list
- **Add notes.** Each one is stamped with the date, time and your initials. You can only edit or delete your own most recent note, earlier notes stay as a record
- **Edit the customer's details**
- **Change the status, or mark it as a lead**

Customer Information

Edit

Title	First Name*	Last Name*
	Peter	Smith
County	Town	Postcode
		TN39 3LW
Address Line 1	Contact Type	Primary Phone
	Customer	07999 111234
Address Line 2	Mobile	Email Address
		petersmith1974@gmail.com
Address Line 3	Company Name	Marketing Emails
		Yes

Customer information, editable at any time from this page.

SECTION 5

Linking a lead to a sale, reservation or purchase

Turn a lead into the next step, without retyping the customer's details.

When you change a status to **Confirmed** or **Completed**, a window opens letting you link the lead to a sale, reservation or purchase of a vehicle. Confirming this creates that record for you and carries the customer's details straight over.

The screenshot shows the Autopromotor Pro web application. On the left is a dark sidebar with navigation links: My Stock, Enquiries (highlighted), Webpage Editor, Books, Service, Contacts, Reporting, Advantage, and Broadcasting. The main area has a search bar at the top and a section for 'Leads & Enquiries' featuring a lead named 'Harriet Cole'. A modal window titled 'Lead Follow Up Information' is open, containing the following fields:

- Follow Up Date (Optional):** A text input field containing '21 Sept 2026'.
- Assign Lead to Vehicle:** A dropdown menu showing 'Ford Focus - BD19 KLM - 10842'.
- Assign Lead to Purchase, Reservation or Sale:** A dropdown menu showing 'Sale'.
- Extra Notes:** A text area containing 'Coming in Saturday at 10am'.

Below the fields is a light blue informational banner: 'Setting a lead to reserved will mark the vehicle as reserved'. At the bottom of the modal are two buttons: 'Cancel' and 'Confirm'.

Linking a confirmed lead to a vehicle and a sale, reservation or purchase. Names and dealer details shown are for illustration only.

What you can add

- **Follow up date**, optional
- **Vehicle**, choose which vehicle the lead is being linked against
- **Purchase, reservation or sale**, choose which type of record to create
- **Extra notes**, optional. Anything you add here is saved as a timestamped note on the enquiry, the same as notes added from the detail page

Good to know: in this release, linking only works in one direction, from a lead to a sale, reservation or purchase. Linking back the other way is planned for a later phase, once those pages have their new look.

SECTION 6

What is coming next

Leads and Enquiries will keep growing. A couple of things already on the roadmap:

- Linking back to a lead from the sale, reservation or purchase pages, once those are rebuilt
- Reporting on leads, using the marked as lead data you are already capturing today

If you have questions or feedback on Leads and Enquiries, get in touch with your Autopromotor support contact.