

## SFX- Requesting ICO Retrain & vAuto New User Training

1. In SFX, navigate to the account (at the CA ID level) needing training:

The screenshot shows the SFX account page for 'GREG'S PROD TEST ACCT'. The account details are as follows:

Field	Value
Type	Dealer
Subtype	Independent
Business Status	CIO In Progress
CA ID	CA12775605
Account Name	GREG'S PROD TEST ACCT
Parent Account	
Ultimate Parent	
Phone	78964233
DMA	MONTGOMERY
Sub-Market	0
Website	
Legal Name	
Type	Dealer
Customer Classification	Unclassified
Client Status	

On the right side of the page, there are several notifications:

- There is currently a cancellation in progress**
- Confidential Change in Ownership (CIO) - Rules of Engagement**
  - Do Not Discuss Confidential CIO with anyone at the SELLING or BUYING Dealership
  - Do Not Disclose Confidential CIO information to anyone outside of Cox
  - When sharing details internally call out the CIO Rules of Engagement where applicable
- We found no potential duplicates of this Account.**
- Related List Quick Links**
  - Account Team (0)
  - Ultimate Parent Hierarchy (0)
  - Account Vendors (0)
  - Contacts (10+)
  - Referrals (0)
  - Users in Assigned Territories (10+)

2. Click “**New Opportunity**” in the upper right corner of the screen when you are on the Account in SFX.
3. Select “Create A New Opportunity”
  - a. Account Name: (this should populate for you with the Account you are on)
  - b. Deal Type: Choose “**Rooftop Direct**”
  - c. Opportunity Name: **Fill in a summary of what you need training on**
  - d. Close Date: Select **today’s date**
  - e. Stage: **Learn**
  - f. Opportunity Type: **Upsell**

The screenshot shows the 'New Opportunity' form in SFX. The form is titled 'New Opportunity' and has the following fields:

- Choose An Action:**
  - Work An Existing Opportunity
  - Create A New Opportunity
- Create an Opportunity:**
  - Account Name:** GREG'S PROD TEST ACCT
  - Opportunity Name:** vAuto: Provision T1, T2, and Photos
  - Deal Type:** Rooftop Direct
  - Close Date:** Feb 29, 2024
  - Stage:** Learn
  - Opportunity Type:** Upsell

A 'Next' button is located at the bottom right of the form.

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4. Click “Next” and the Opportunity will be created and re-redirect you to the **Opportunity**:

The screenshot shows the Salesforce Opportunity record page. At the top, there are navigation buttons: Follow, Edit, Delete, Add Competitor, Clone, New Quote, Sharing, New Brand Level Objective, and New Enterprise Objective. Below this, the account name is 'GREG'S PROD TEST ACCT', the close date is '2/29/2024', and the opportunity owner is 'Jon Phillips'. The main content area is divided into 'Details', 'Related', 'CPQ', and 'Seismic' tabs. The 'Details' tab is active, showing 'Opportunity Information' with fields for Opportunity Name, Account Name, Close Date, Type, Forecast Category, Pipeline, Deal Type, and Description. To the right, there are 'Stage Verifiers' and 'Activity' sections. The 'Stage Verifiers' section includes 'Related List Quick Links' for Products, Orders, CPQ Quotes, Competitors, Opportunity Team, and Referrals. The 'Activity' section has a 'New Task' button and a 'Create a task...' input field.

5. In the upper right corner of the Opportunity, click “Add Competitor.”
- Solution: choose either **Kelley Blue Book Instant Cash Offer** or **vAuto**
  - (if vAuto), Competitor Name: choose **No Competitor**
    - Kelley Blue Book ICO does not populate a Competitor Name field*
  - Click **Next**

The screenshot shows the 'Add Competitor' dialog box in Salesforce. The dialog has a title bar with a close button (X). Below the title, there are two dropdown menus. The first dropdown is labeled 'Solution' and has 'vAuto' selected. The second dropdown is labeled 'Competitor Name' and has 'No Competitor' selected. To the right of these dropdowns, there is explanatory text: 'Represents the general Cox solution or group associated with the opportunity competitor. The value chosen here will determine the sales category values available.' and 'The owning entity of the competitor brand. Choices available depend on Solution value chosen.' At the bottom right of the dialog, there is a 'Next' button. The background shows the Salesforce Opportunity record page with the 'Add Competitor' button highlighted in yellow.

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6. On the next screen:
  - a. Competitor Promotion Offered: **No**
  - b. Click **Next**

The screenshot shows a form titled "Add Competitor". It contains the following fields and instructions:

- \*Competitor Promotion Offered?**: A dropdown menu with "No" selected. To the right, it says "Did the competitor offer a promotion?".
- Competitive Rate**: An empty text input field. To the right, it says "Additional information on the promotion offered by the competitor".
- Below the input field, there is a note: "The rate offered by competitor. Could include MRR, OTC or blend depending on information shared."
- At the bottom right, there are two buttons: "Previous" and "Next".

7. You will be directed back to the main opportunity screen.

8. **"Description"** field- Please be sure to include all important training details in this section (e.g., Training POC, who needs training and what type of training, etc.). Once you have entered this info then click "Save".
  - a. *Please note: this field will be locked once the opportunity is Closed Won, so entering notes now is the best way to inform the Trainer what is needed.*

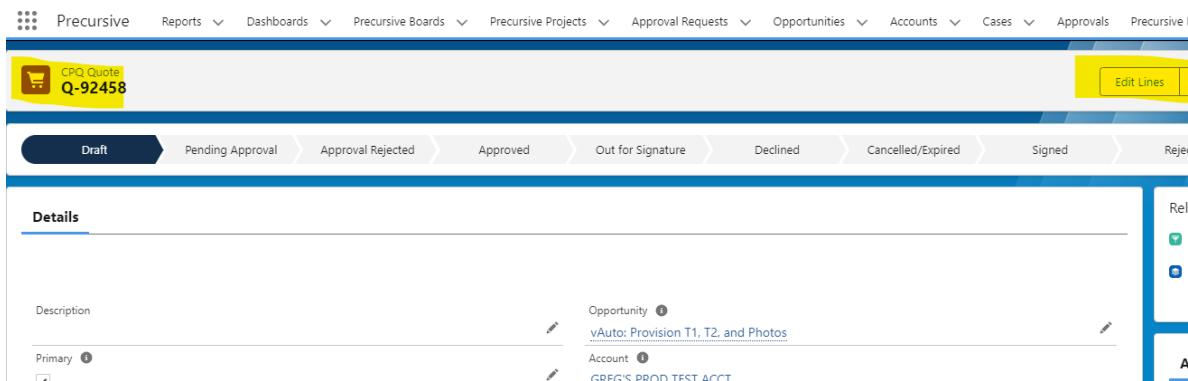
The screenshot shows the "Opportunity Information" form for an opportunity named "vAuto: Provision T1, T2, and Photos". The form is divided into several sections:

- Opportunity Information**:
  - \*Opportunity Name**: vAuto: Provision T1, T2, and Photos
  - \*Account Name**: GREG'S PROD TEST ACCT
  - \*Close Date**: 2/29/2024
  - \*Type**: Upsell
  - \*Forecast Category**: Pipeline
  - Deal Type**: Rooftop Direct
  - Description**: Jon Phillips needs training on Pricing & Appraisal, AutoWriter and Merch, and how to upload photos. His phone number is 555-555-5555
- Price Book**: COX Price Book
- Opportunity Owner**: Jon Phillips
- Amount**: (empty)
- \*Stage**: Learn
- Probability (%)**: 10%
- Loss Reason**: --None--
- Long Loss Reason**: (empty)

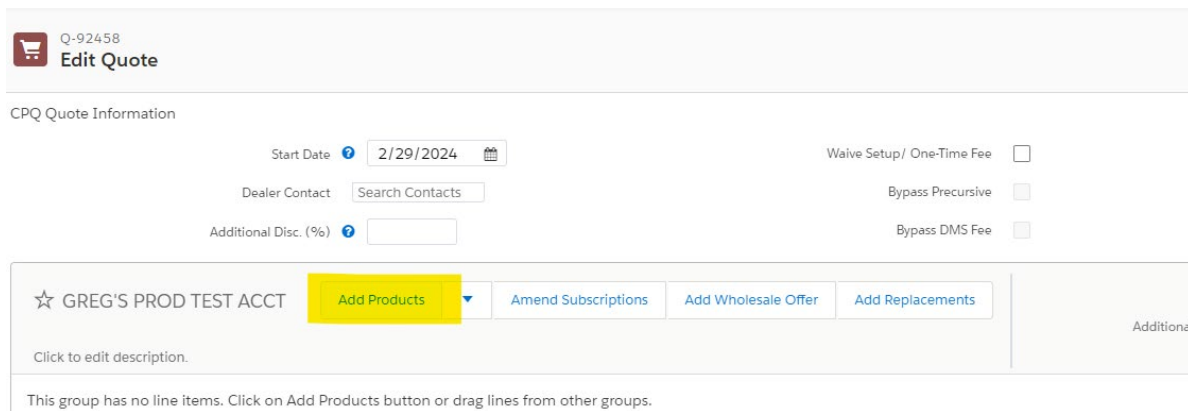
At the bottom of the form, there are "Cancel" and "Save" buttons. The "Save" button is highlighted in yellow.

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9. Click **“New Quote”** in the upper right corner of the Opportunity.
  - a. *You can skip adding a description here – it will not be visible to the Training team.*
10. You will be redirected to a screen for your **CPQ Quote**. In the upper right corner, click **“Edit Lines”**

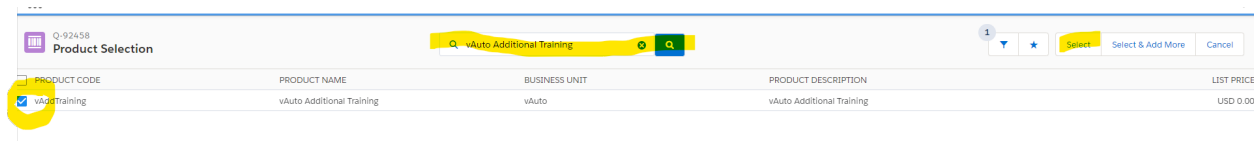


11. You will be directed into the CPQ Quote. Click **“Add Products”** in the middle of the screen:



- **IMPORTANT:** If, you are requesting an ICO Retrain, search for **ICO Additional Training**
- **IMPORTANT:** If you are requesting new user training for vAuto, search for **vAuto Additional Training**

12. Whichever product you need, select the Checkbox next to it and then click **Select** in the upper right corner



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13. After you have selected your product, you will be redirected back to the CPQ quote. Click **Save** in the upper right-hand corner.
14. You will be redirected back to the CPQ Quote and will need to add the **DEALER CONTACT** to the quote. You need to select the contact at the dealership needing training. If you cannot find the contact, it means they are not in SFX, and you will need to create a new contact.

Dealer Contact

Robert Claypoole

Show All Results for "Robert Claypoole"

Robert Claypoole  
GREG'S PROD TEST ACCT

+ New Contact

Contact Information

15. Once you have added the contact, you will have the ability to **“Create Order”** in the upper right-hand corner of the CPQ Quote. This will send the training request to either the vAuto training team or the ICO team for scheduling.

**COMPLETE**