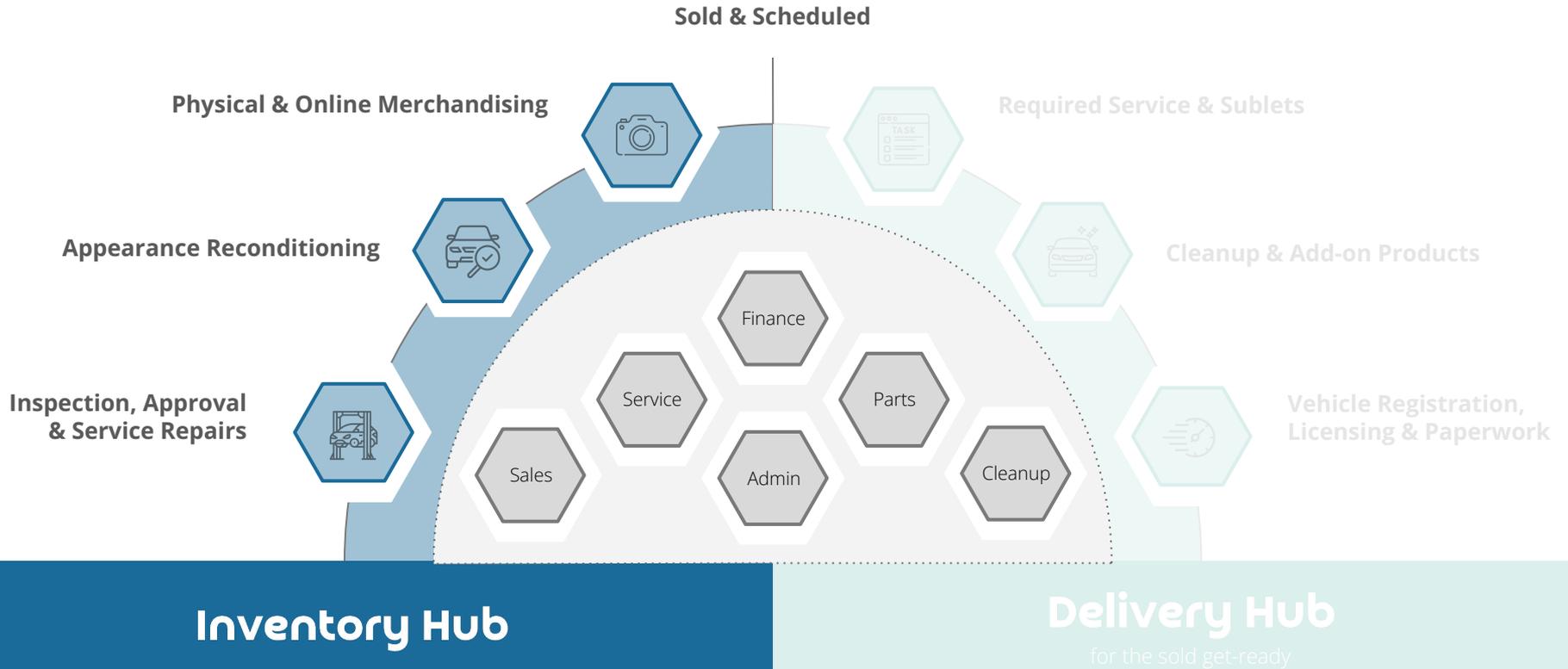


Inventory Hub

QUICK START GUIDE FOR USERS

INVENTORY HUB = FASTER FRONTLINE READINESS





Thank you for choosing Inventory Hub as your go-to solution for Frontline Readiness (FLR)! These next pages will guide you through system concepts and the 5 steps to FLR.

As always, if you have any questions or ideas please do not hesitate to contact us - support@dealerbydesign.ca



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Knowledge Base

get.dealerbydesign.ca/help

Book Online Training

get.dealerbydesign.ca/training



When added to the system as a user, you will receive a Welcome email - **be sure to click the [Sign In Now](#) button to validate your account and set your password.**

If you do not validate your account, you will not be able to login - even if you reset your password.



DEALER
BY
DESIGN

Didn't receive the Welcome email?

Check spam, then ask an Admin user to 'Resend Validation'

WHAT'S AHEAD

CORE CONCEPTS

Foundational ideas behind how Inventory Hub works and why it matters.

KEY FEATURES + UI CALLOUTS

High-level overviews of major features followed by visual breakdowns.

KEY ACTIONS + WALKTHROUGHS

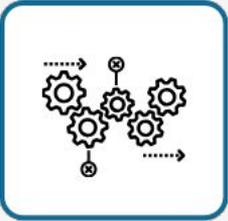
Explanations of core user actions paired with step-by-step instructions.

CORE CONCEPTS



VEHICLE LIFECYCLE STAGES

How vehicles move through key stages — from 'Approval Required' when it arrives in the feed, to 'Active' when approved, then to 'Archived' when sold and delivered.



PROCESSES BY VEHICLE TYPE

Processes are tailored by vehicle type (New, Used, Demo, Fleet) to reflect different operational needs through Task Plans



FRONT-LINE READINESS (FLR)

Establishes a clear milestone for when a vehicle is considered sale-ready, based on the completion of FLR-tagged tasks



USER ROLES

How different users interact with the system — including the Inventory Manager, a role critical to the success of Inventory Hub



APPROVAL & OVERSIGHT

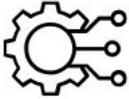
Inventory Managers oversee vehicle approvals, budgets, and service recommendations — ensuring oversight and cost discipline.



AUDITABILITY & ACCOUNTABILITY

All actions taken on a vehicle are tracked through the History Log, promoting transparency and traceability

KEY FEATURES + UI CALLOUTS



INVENTORY FEED

Ingests vehicle data via CSV or API to populate Inventory Hub. Can be configured to pull from DMS or Media Providers



INVENTORY DASHBOARD

Main UI for viewing, filtering, and managing vehicles.



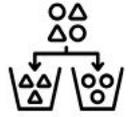
INVENTORY PROFILE

A centralized view of a vehicle, showing its status, tasks, service items, budget, and history — everything needed to reach Front-Line Ready.



VEHICLE LIFECYCLE BUCKETS

Tracks current state (Approval Required, Active, Archived).



VEHICLE TYPE CLASSIFIER

Assigns type (New, Used, Demo, Fleet), drives task plans and budgets.



TASK PLANS BY VEHICLE TYPE

Predefined, configurable task sets tied to each vehicle type.



SERVICE LINE-ITEMS

Work entries added by Service, marked as Required or Recommended.
Await Inventory Manager approval.



VEHICLE COST & BUDGETING (VCB)

For Inventory Managers to track purchase price, cost-to-FLR, and budget.



FRONT-LINE READY (FLR) TRIGGER

Automatically marks vehicle FLR once tagged tasks are completed



TASK LIST WATCHLISTS

Notifies selected users or roles when relevant task activity occurs.



HISTORY LOG

Audit trail of all changes made to the vehicle profile.

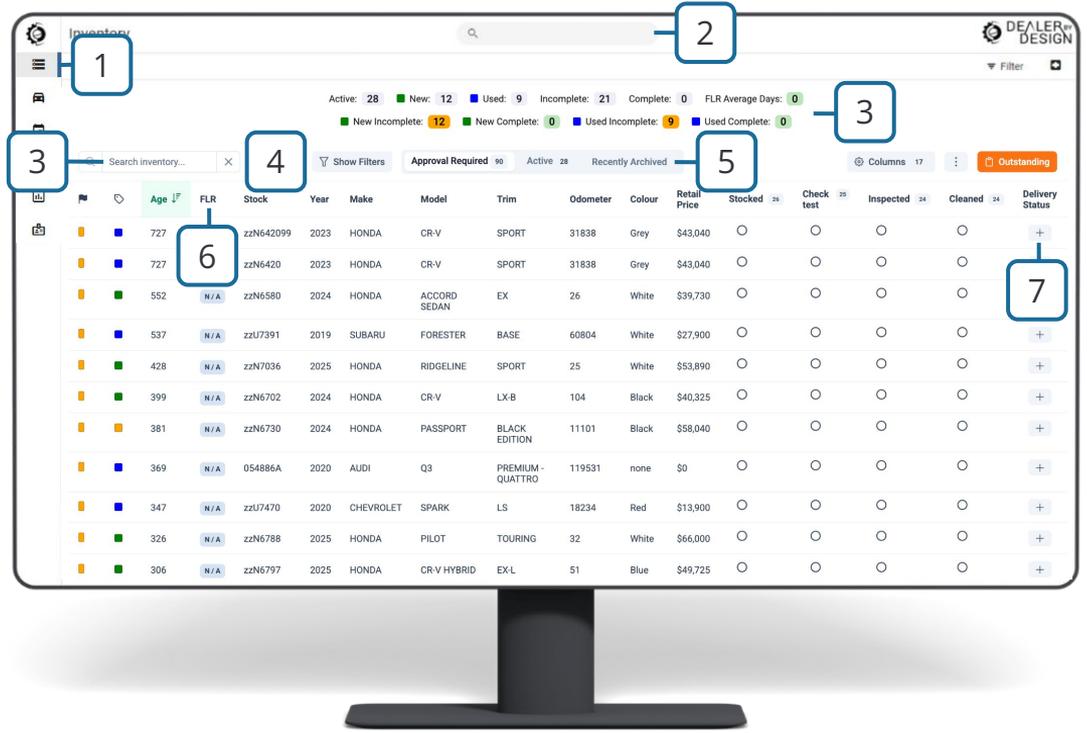


INVENTORY MANAGER ROLE

Grants authority to approve vehicles, budgets, and service items.

INVENTORY DASHBOARD

- 1 Access to Inventory Hub
- 2 Delivery + Inventory Hub Search Bar
- 3 Inventory Table Search
- 4 Inventory Table Filters
- 5 Vehicle Lifecycle Buckets
- 6 Front-Line Ready Indicator
- 7 Schedule/Jump to a Delivery



INVENTORY OUTSTANDING VIEW

- 1 Count of vehicles with outstanding tasks, by tasklist
- 2 Back to Inventory Dashboard
- 3 List of vehicles with outstanding tasks, by tasklist
- 4 Items displayed, per tasklist

Inventory - Outstanding

Outstanding Tasks by Tasklist: Inventory Manager: 0 Service Intake: 18 Parts: 2 Service Repair: 1 Detailing: 20

Back to Dashboard

Inventory manager (0)

Age	FLR	Stock	Condition	Year	Make	Model	Trim	Odometer	Exterior Color	Retail Price
No inventory items found.										

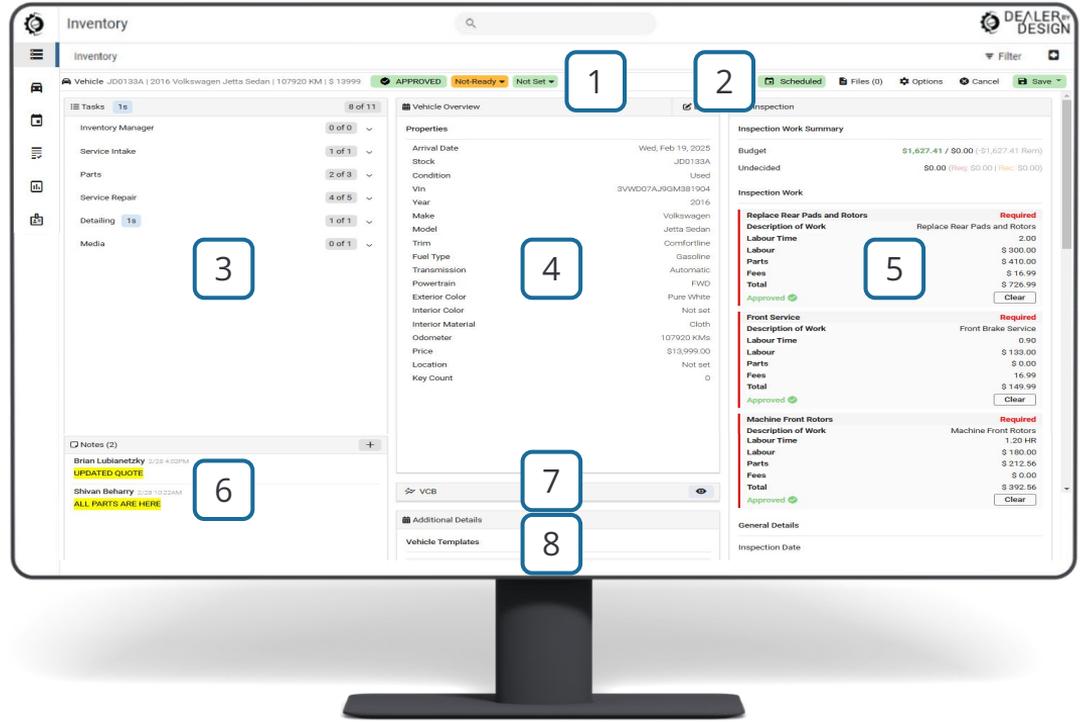
Items per page: 10

Service intake (18)

Age ↓	FLR	Stock	Condition	Year	Make	Model	Trim	Odometer	Exterior Color	Retail Price
28	28	UP9546	Used	2021	Hyundai	Elantra	Preferred	51792	Polar White	\$0
18	18	UP9580	Used	2024	Toyota	RAV4	LE AWD New Arrival Preferred AWD New Ar..	36040	Silver	\$35,799
18	18	UP9566	Used	2024	Hyundai	Tucson	Preferred AWD New Ar..	52566	Crystal White	\$32,799
17	17	UP9460A	Used	2018	Jeep	Wrangler JK	Sahara	126761	Bright White	\$0

INVENTORY PROFILE

- 1 Approval, FLR & Location easy to access toggles
- 2 **Delivery Hub** button
- 3 Task Lists
- 4 Vehicle Details
- 5 Service Line Items, added items are listed with controls
- 6 Notes, instead of emails
- 7 VCB Widget
Inventory Manager only
- 8 KEYper Widget



INVENTORY

VCB WIDGET

- 1 Days since first seen in feed
- 2 Price & Cost with CarPraze market differentials
- 3 Sum of all approved service line-items
- 4 Flooring cost calculated by new & used flooring rates
- 5 Budget spent vs allotted
- 6 To inventory in CarPraze
- 7 Carpraze Market Statistics

VCB / CARPRAZE

Vehicle Cost & Profit	
Price	▲ 4.2% \$21,000.00
Cost	▲ 2.6% -\$14,100.00
Approved Work Cost	-\$0.00
Flooring Cost	-\$0.00
Profit Margin	\$5,100.00
Vehicle Budget	
Budget Spent	5 0% (\$0.00 / \$3,000.00)
Undecided Work Cost	\$0.00
CARPRAZE 6 Open	
Appraisal Value	\$13,000.00
Retail Target	\$20,142.00
Trade Target	\$14,475.00
Cost to Market %	7 85%
Market Price %	95%
Price Position	8/16

VCB widget shown with optional CarPraze integration.
get.dealerbydesign.ca/carpraze for more info

KEY ACTIONS + WALKTHROUGHS



APPROVE VEHICLE

Ingests vehicle data via CSV or API to populate Inventory Hub. Can be configured to pull from DMS or Media Providers



SERVICE INTAKE

Main UI for viewing, filtering, and managing vehicles.



REVIEW & APPROVE LINE-ITEMS

A centralized view of a vehicle, showing its status, tasks, service items, budget, and history — everything needed to reach Front-Line Ready.



COMPLETE THE TASK PLAN

Tracks current state (Approval Required, Active, Archived).



ACHIEVE FRONT-LINE READINESS

Assigns type (New, Used, Demo, Fleet), drives task plans and budgets.



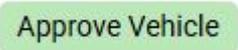
ARCHIVE

Predefined, configurable task sets tied to each vehicle type.

NEXT UP: STEP BY STEP INSTRUCTIONS

APPROVAL REQUIRED → ACTIVE

As vehicles appear on your feed, they will automatically be added to Inventory Hub!
By default, these vehicles require check in approval from an Inventory Manager.

- On the dashboard, click the tab 
- Select a vehicle on the list you want to get frontline ready (FLR)
- Click  located in the subheader
- Confirm price & cost. Set location, key count & budget
- Apply a task plan
- Click done, review, then save

After check in, the vehicle will be on the Active tab - on its journey to FLR!

INSPECTION & SERVICE LINE-ITEMS

After check in, departments can start completing assigned tasks. For Service, this is generally a PDI for new and safety inspection for used as initial steps.

If **recommended** or **required** service items are found during inspection, a line by line quote can be created and attached to the vehicle.

- Click **Edit** and navigate to the Inspection tab
- Click **Add Item**, select service, enter item information
- Repeat above as necessary
- Click done, review, then save

Need to add or change information about a service? **Read how in the SETUP GUIDE!**

REVIEW & APPROVE LINE-ITEMS

As line items are added by Service, Inventory Managers will be notified to **APPROVE** or **DENY**. When approved, tasks will be created for the Parts and Service Repair task lists. If line item approval is removed, so are any associated tasks that were created.

If needed, to review the timeline of changes for a specific vehicle:

- Click on a vehicle from the dashboard
- Click **Options** in the subheader, near the top right
- Click **History**

COMPLETE THE TASK PLAN

Employees assigned to a task list watchlist will receive notifications whenever tasks are delegated to them - like when an line item is approved.

Stay up to date with outstanding tasks with the real-time dashboard. Simply sort your task column! When sorting a task column, it will also sort old to new.

TASK COLUMN ICONS



No tasks assigned



Tasks assigned, not all complete



Tasks assigned, all complete

A vehicle can be front-line ready, but still have outstanding tasks depending on settings

FRONT-LINE READINESS

Once Service Intake (or Repair) is completed, Detail & Merchandising tasks are often the next priority. To reduce the time to frontline ready, by default, notifications are sent to the next task list in priority order.

Once frontline ready, be sure to set the Inventory View status dropdown from 'Not-Ready' to 'Ready'. This will change the FLR icon on the dashboard.

AT RISK



LESS THAN 1 DAY



OVER TARGET



MARKED READY



DAYS TAKEN

Need to have a vehicle recleaned after FLR? Manually add a task to a task list!