

AFTERSALES LEAD MANAGEMENT

OPERATIVE USER MANUAL

March 2026



INDEX

INTRODUCTION	<u>3</u>
LEAD MANAGEMENT PROCESS OVERVIEW	<u>6</u>
LEAD CREATION	<u>18</u>
LEAD QUALIFICATION	<u>20</u>
APPOINTMENT MANAGEMENT	<u>24</u>
CLOSING A NEGOTIATION	<u>27</u>
VEHICLES PAGE	<u>34</u>
MONITORING & KPI	<u>36</u>
MOBILE WEB APP	<u>45</u>
GLOSSARY	<u>52</u>
CONCLUSIONS	<u>55</u>



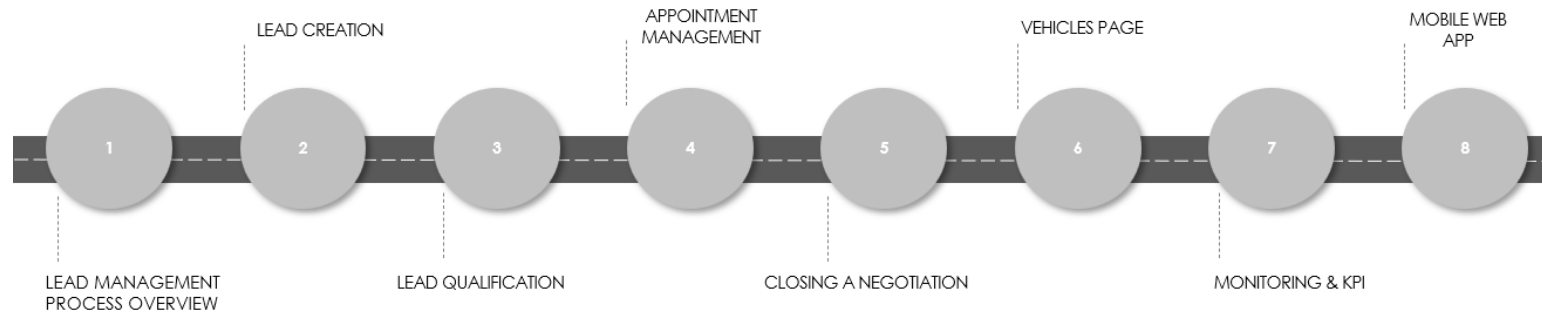
Introduction

Welcome to the new manual on how to support the Aftersales Lead Management process in Salesforce. Each topic can be selected from the Index to facilitate consultation of the document.

Salesforce is the official CRM tool for Maserati chosen for the complete management and conversion of Aftersales Leads. Maserati network Dealers can:

- Intercept the Leads generated spontaneously by Customers through available channels (CUSTOMER-DRIVEN Leads)
- Receive Leads generated centrally by Maserati based on current campaign targeting (HQ-DRIVEN Leads)

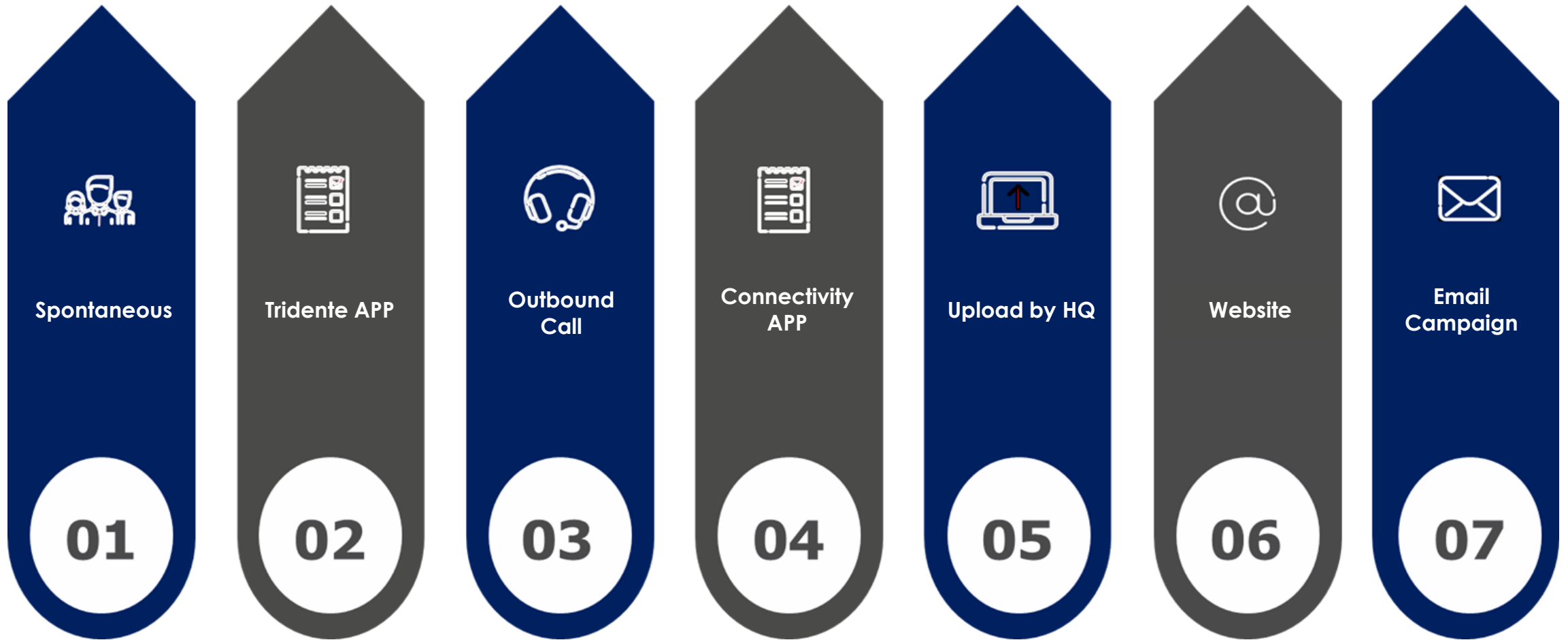
This manual provides a comprehensive overview of the process to support Dealers in the day-to-day Aftersales Lead system management. It consists of several sections that can be consulted separately:



To ensure the **best performance of Salesforce**, **Google Chrome** is the **recommended browser**.



Lead generation sources

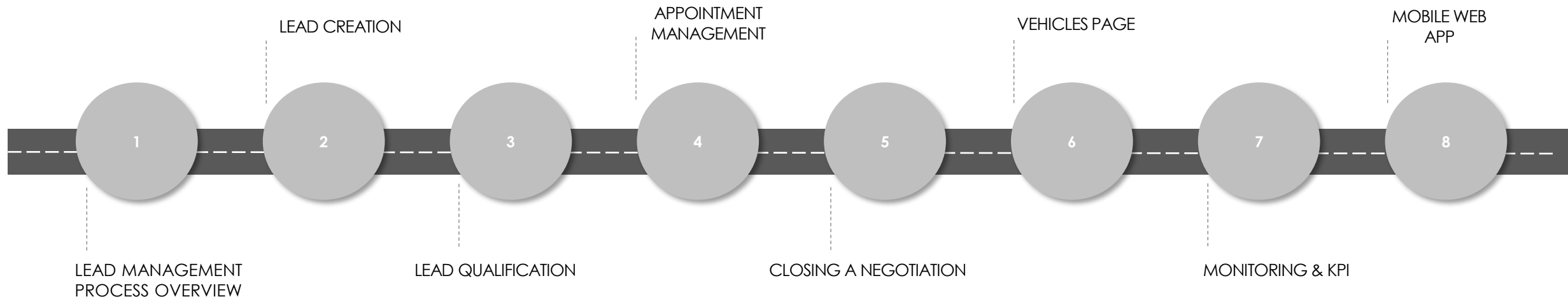


Maserati driven

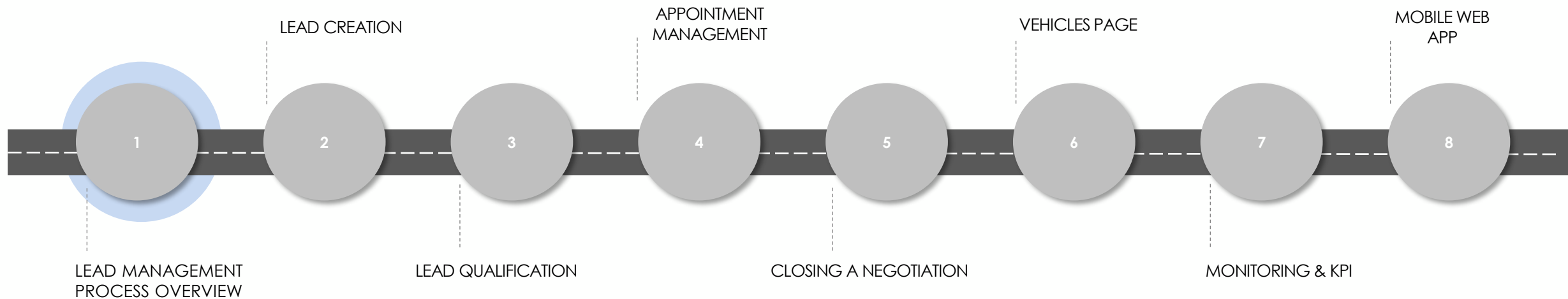
Customer driven



Manual navigation guide



Lead management process overview



ASLM Process – Introduction

The Aftersales Lead management process, is designed to:

- Improve the Maserati Customer Experience by using dedicated digital tools
- Increase workshop traffic and business opportunities for Dealers
- Increase brand loyalty and Customer satisfaction

A Lead is a ***business opportunity***

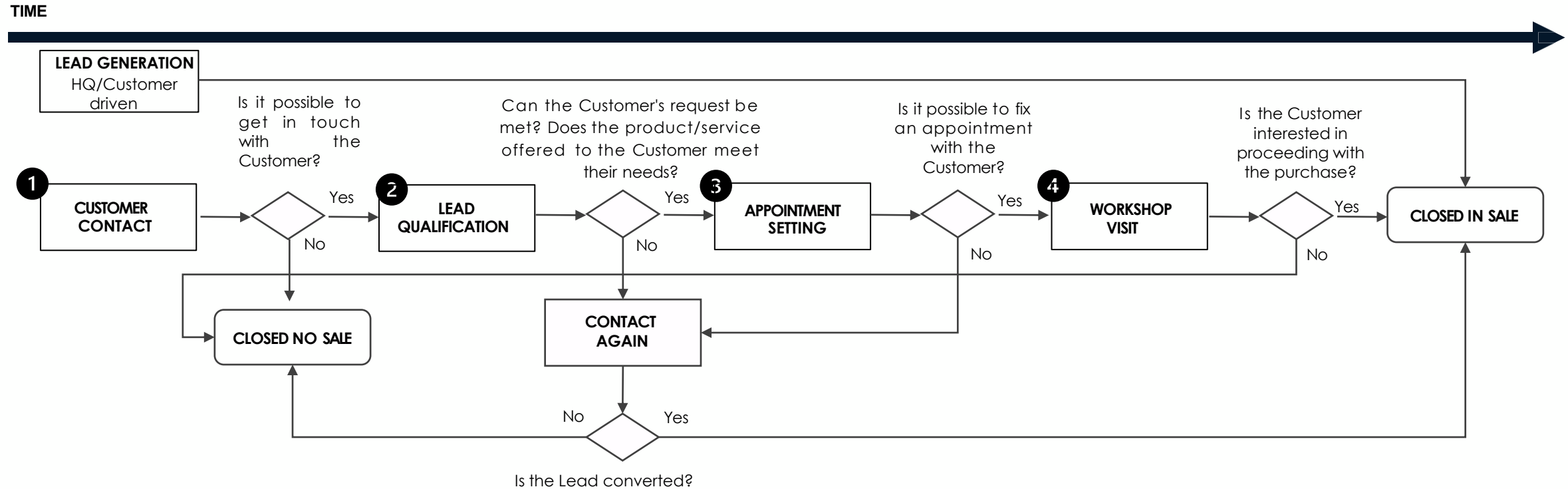
The objective for the Dealer is to convert Leads into ***sales of services and products***



ASLM Process – Overview

The Lead management process consists of several successive steps:

1. LEAD CONTACT – 2. LEAD QUALIFICATION – 3. APPOINTMENT – 4. WORKSHOP VISIT



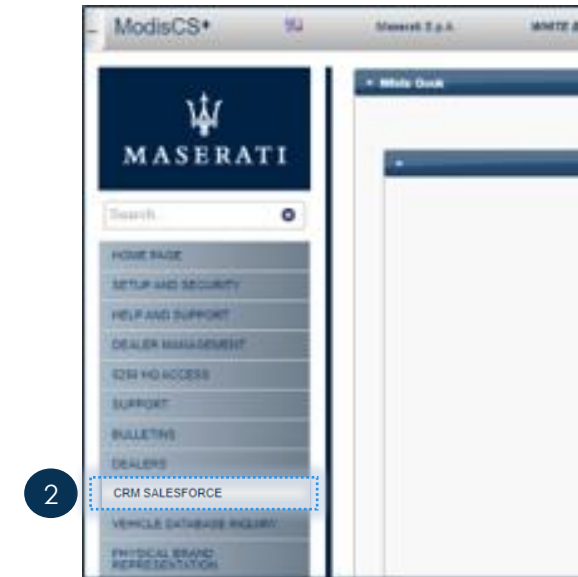
When managing the Leads, the aim is ideally to get the workshop to carry out the work or to sell a product/service. This is not always possible because going from one step to the next is possible only if the answer to each question is affirmative (◇). Please note that if a Lead is not managed within 60 days, it is automatically closed as "Lost Sale".



Login to Salesforce

To log in to Salesforce, you must first access Modis, click on the “CRM Salesforce” option on the left, and then select your SF profile.

1. Log in to MODIS CS+ using your own credentials
2. In the menu on the left, select CRM SALESFORCE to access the Salesforce home page.



If you have more than one profile, select the Aftersales profile to continue



Salesforce Homepage

Global search

Notifications

Tabs to access all CRM functions

Today's event

Search Customer

Record Count

After-sales Leads View "Assigned to Dealer"

Salesforce Manual

The screenshot shows the Maserati Salesforce homepage. At the top is a dark blue header with the Maserati logo on the left, a search bar in the center, and a user profile icon on the right. Below the header is a navigation bar with tabs: Home, Aftersales Leads, Vehicles, Reports, and Dashboards. The main content area is divided into several sections. On the left, there's a 'Today's Events' section showing a calendar entry for 06:30 PM with a link to 'Call UAT 001' and a date '02/09/2026, 07:30 PM'. Below this is a 'Search Customer in Maserati Database' section with input fields for Name, Surname, VIN, and Plate, and a 'Search' button. On the right, there's a 'Common Links' section with a 'Salesforce Manual' button. Below that is a 'Record Count' section featuring a donut chart with the number '821' in the center. A legend to the right of the chart lists various statuses with corresponding colored dots. At the bottom, there's a table titled 'Aftersales Leads - Assigned to Dealer' with columns for AS Lead Name, Created Date, Status, Source, AS Campaign, and Dealer Contact Att. The table contains four rows of test data.

	AS Lead Name	Created Date	Status	Source	AS Campaign	Dealer Contact Att
1	Test004 Test004	2/3/2026 5:25 PM	Assigned to Dealer	Spontaneous	Spontaneous Dealer	0
2	Test003 Test003	2/3/2026 5:25 PM	Assigned to Dealer	Spontaneous	Spontaneous Dealer	0
3	Test001 Test001	2/3/2026 5:25 PM	Assigned to Dealer	Spontaneous	Spontaneous Dealer	0
4	Test002 Test002	2/2/2026 9:06 AM	Assigned to Dealer	Spontaneous	Spontaneous Dealer	0



List View “Assigned to Dealer” 1/2

To access the list of leads waiting to be selected and managed, click the “Aftersales Leads” tab.

To modify the lead filters, click the arrow icon “”.

	AS Lead Name	Created Date	Status	Source	AS Campaign	Dealer Contact Attempt	Days from Lead creation
1	Test004 Test004	2/3/2026 5:25 PM	Assigned to Dealer	Spontaneous	Spontaneous Dealer	0	5
2	Test003 Test003	2/3/2026 5:25 PM	Assigned to Dealer	Spontaneous	Spontaneous Dealer	0	5
3	Test001 Test001	2/3/2026 5:25 PM	Assigned to Dealer	Spontaneous	Spontaneous Dealer	0	5
4	Test002 Test002	2/2/2026 9:06 AM	Assigned to Dealer	Spontaneous	Spontaneous Dealer	0	7

In the View menu, in addition to the list of leads with “Assigned to Dealer” status, the following views are available:

- **Closed in Sale:** the List View shows all leads with “Closed in Sale” status .
- **Closed No Sale:** the List View shows all “Closed No Sale” Leads, including the detailed reasons for the unsuccessful sale.
- **In Progress:** the List View shows all leads with “Assigned to Dealer” status with at least one “Dealer Contact Attempt” recorded.
- **Lost Sale:** the List View shows all leads with “Lost Sale” status.
- **Not Managed Yet:** the List View shows all leads with “Assigned to Dealer” status and no “Dealer Contact Attempt” recorded.

RECENT LIST VIEWS

✓ Recently Viewed (Pinned list)

- Service Dealers - Assigned to Dealer
- Service Dealers - Closed in Sale
- Service Dealers - Closed No Sale
- Service Dealers - In Progress
- Service Dealers - Lost Sale
- Service Dealers - Not Managed Yet

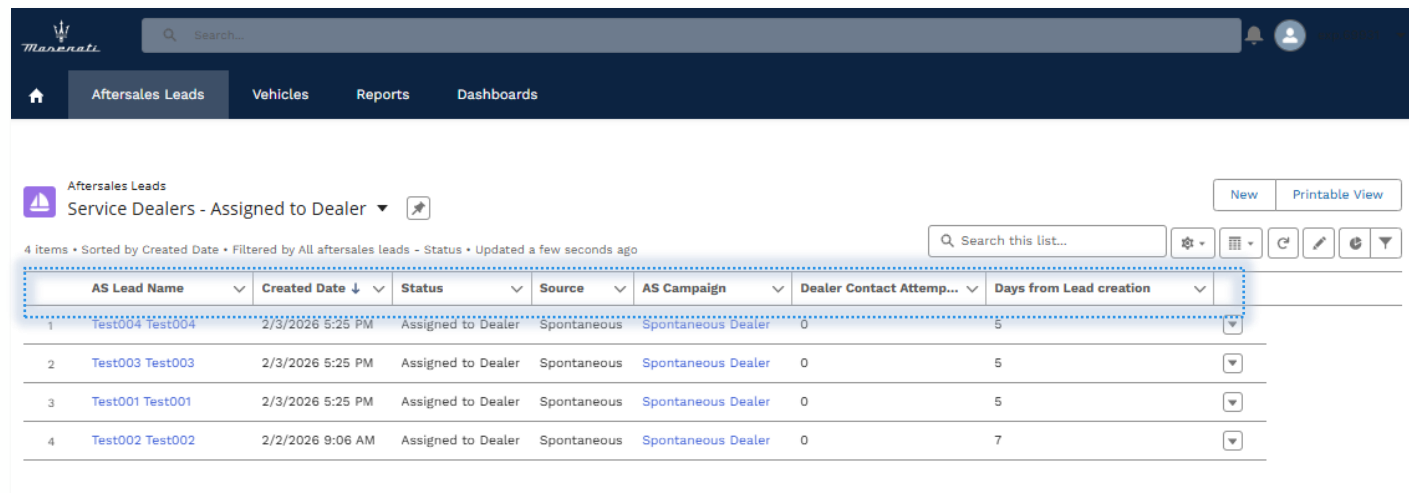


List View “Assigned to Dealer” 2/2

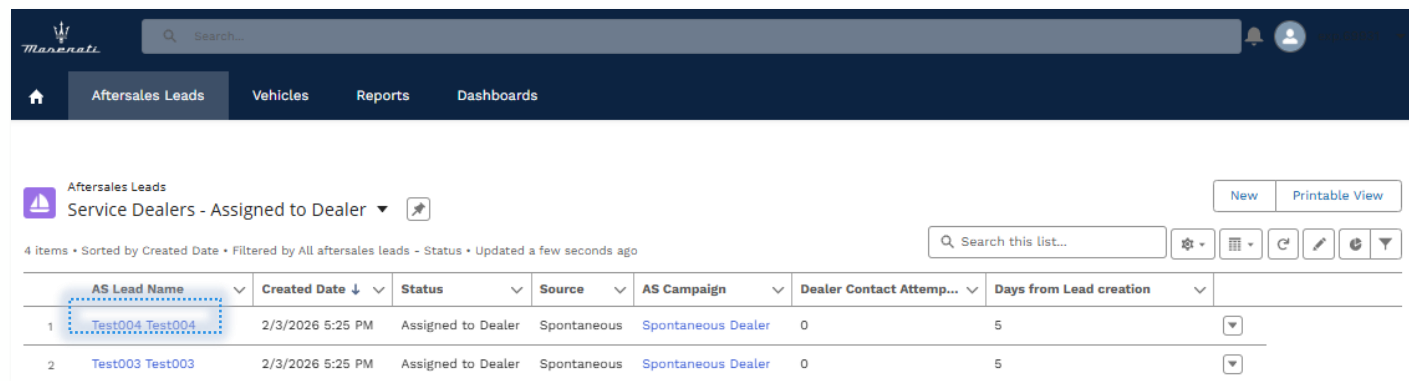
The list of Leads in “Assigned to Dealer” Status provides the main information about the Lead:

- **AS Lead Name:** name and surname of the Lead
- **Created Date:** The date on which it was created
- **Status:** This is always “Assigned to dealer” in this View
- **Source:** This indicates the source of the Lead, i.e., the channel through which it was generated
- **AS Campaign:** This indicates the respective Campaign (i.e.: Service Reminder / Seasonal Promo)
- **Dealer Contact Attempts Done:** Indicates the number of contact attempts done by the dealer
- **Days from Lead creation:** Indicates the number of days that have passed since the lead was created

To access the Lead page, simply click on the name in the **AS Lead Name** column.



	AS Lead Name	Created Date	Status	Source	AS Campaign	Dealer Contact Attemp...	Days from Lead creation
1	Test004 Test004	2/3/2026 5:25 PM	Assigned to Dealer	Spontaneous	Spontaneous Dealer	0	5
2	Test003 Test003	2/3/2026 5:25 PM	Assigned to Dealer	Spontaneous	Spontaneous Dealer	0	5
3	Test001 Test001	2/3/2026 5:25 PM	Assigned to Dealer	Spontaneous	Spontaneous Dealer	0	5
4	Test002 Test002	2/2/2026 9:06 AM	Assigned to Dealer	Spontaneous	Spontaneous Dealer	0	7



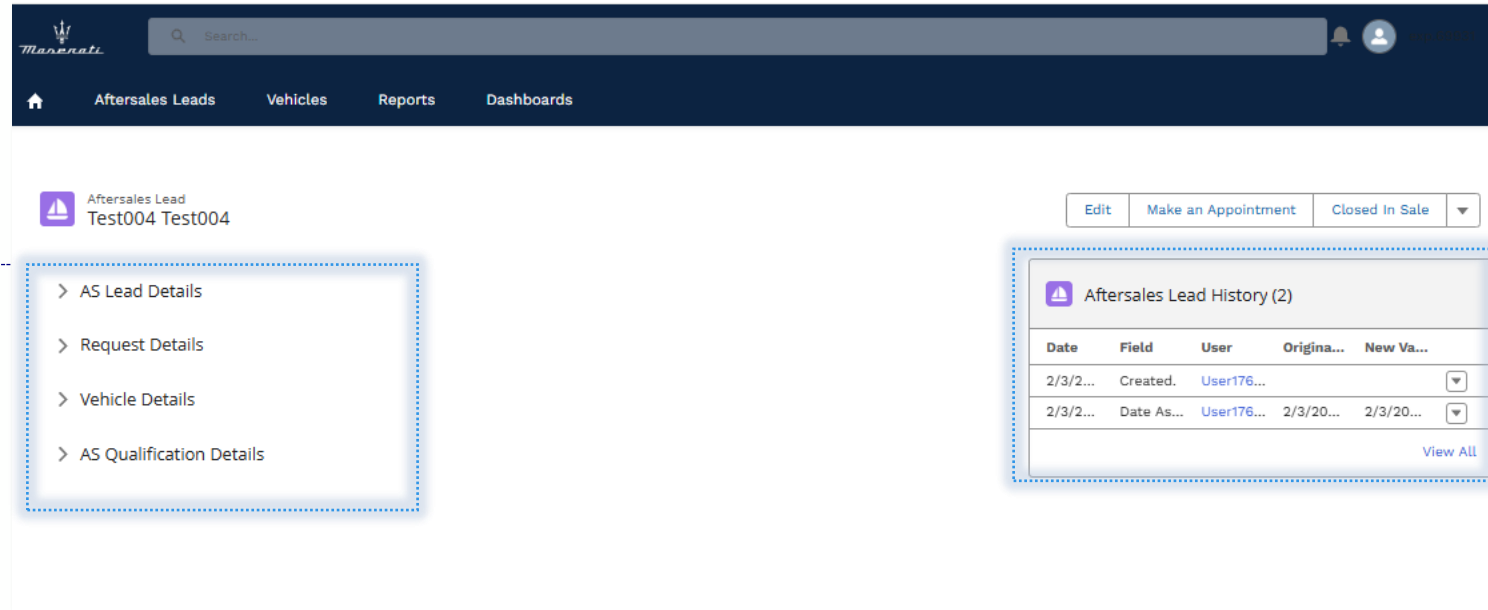
	AS Lead Name	Created Date	Status	Source	AS Campaign	Dealer Contact Attemp...	Days from Lead creation
1	Test004 Test004	2/3/2026 5:25 PM	Assigned to Dealer	Spontaneous	Spontaneous Dealer	0	5
2	Test003 Test003	2/3/2026 5:25 PM	Assigned to Dealer	Spontaneous	Spontaneous Dealer	0	5



Lead main page

The Lead main page is divided into 4 sections:

- **AS Lead Details**
- **Request Details**
- **Vehicle Details**
- **AS Qualification Details**



The “**Aftersales Lead History**” section that shows the history of the main changes made to the Lead during the management process is shown on the right side of the page.



To manage the Lead, you can use the **Action buttons**:

- Edit
- Make an Appointment
- Closed in Sale
- Closed No Sale
- Contact Again
- Printable view



Lead main page – “AS Lead Details”

The “**AS Lead Details**” section contains detailed information about the Lead generated and assigned:

- **AS Campaign:** this provides the campaign name
- **Source:** this provides information about the source of the Lead (i.e. web/digital, edm)
- **AS Lead Type:** provides information about the type of source of the lead
- **Recontacted:** this checkbox, if flagged, reminds the dealer to contact the Customer and suggest a new appointment.
- **Customer Profiling & Marketing consents** information

Aftersales Lead
notifica AS Lead 6 notifica AS Lead 6

Edit Make an Appointment Closed In Sale

AS Lead Details

Status	Direct Marketing
Assigned to Dealer	Yes
AS Campaign	Profiling
AS Campaign Notes	Service Booking - WEB
Source	Web
AS Lead Type	Customer Driven
Recontacted	☐
Master AS Lead	
Days from Lead creation	13
Customer	Customer

Request Details

First Name	notifica AS Lead 6	AS Lead Name	notifica AS Lead 6 notifica AS Lead 6
Last Name	notifica AS Lead 6	Country	Spain
Email Address		State	

Aftersales Lead History (6+)

Date	Field	User	Origina...	New Va...
2/21/20...	Dealer ...	internal...		2/21/20...
2/21/20...	Dealer ...	internal...		2/21/20...
2/18/20...	Created.	internal...		
2/18/20...	Owner	internal...	Internal...	AS CAR...
2/18/20...	AS Lea...	internal...		notifica...
2/18/20...	Record ...	internal...		Service...

[View All](#)



Lead main page – “Request Details”

The “**Request Details**” section contains a set of information of various nature:

1. **Customer information and contact details**
2. **Preferences expressed by the Customer** (Preferred Datetime 1-2-3) **regarding the appointment** and the Appointment date field in which to see the agreed appointment date:
 - “**Request for**” & “**Request details**” are information provided by the Customer at the time of the request.
 - The “**Customer notes**” provides information about notes leaved by the Customer at the time of the request.

The screenshot shows the 'Aftersales Lead' page for 'Test004 Test004'. The 'Request Details' section is highlighted with a blue dashed box. It contains the following fields:

Request Details	
First Name	AS Lead Name
Test004	Test004 Test004
Last Name	Country
Test004	Spain
Email Address	State
test004@test.invalid	Melilla
Contact Number	City
32432423	Madrid
Other Phone	ZIP
Preferred Language	Preferred Datetime 1
Spanish	
Request For	Preferred Datetime 2
Maintenance	
Request Details	Preferred Datetime 3
Appointment Date	Customer Notes
Recontacted Date	Additional Services
	Courtesy Car; Pick Up & Delivery

Numbered callouts: 1 points to the 'Request Details' section header, and 2 points to the 'Preferred Datetime 1' field.

Entering an appointment will send **2 emails to the Customer**: The first confirmation (immediately), the second reminder (the day before the appointment). The same **2 emails** are also sent **to the Dealer**.



Lead main page – “Vehicle Details”

The “**Vehicle Details**” section contains information about the car.

Note: **Only the VIN field can be filled in**, the other fields are filled in automatically.
Entering the VIN is **necessary to conclude the Lead management** with “**Closed In Sale**”.

Aftersales Lead
Test004 Test004

Edit Make an Appointment Closed In Sale

> AS Lead Details
> Request Details
✓ **Vehicle Details**

VIN
ZAMAS57B001373042

Model Description

Warranty Start Date
5/28/2021

Warranty End Date
5/28/2024

Avg KM Customer

Current Mileage

Vehicle Link
[ZAMAS57B001373042](#)

Current Warranty Description

Current Warranty Start Date

Current Warranty End Date

End of Ownership

> AS Qualification Details

Aftersales Lead History (2)

Date	Field	User	Original	New Value
2/3/2021	Created	User176...		
2/3/2021	Date Assigned	User176...	2/3/2021	2/3/2021

[View All](#)

The **VIN is already present for all HQ-DRIVEN** Leads (generated by Maserati).

For **CUSTOMER-DRIVEN Leads** the **VIN may not be present** because the Customer is not obliged to provide it.



Lead main page – “Qualification Details”

The “**Qualification Details**” section can be used to manage the contact and qualification phases of the Lead:

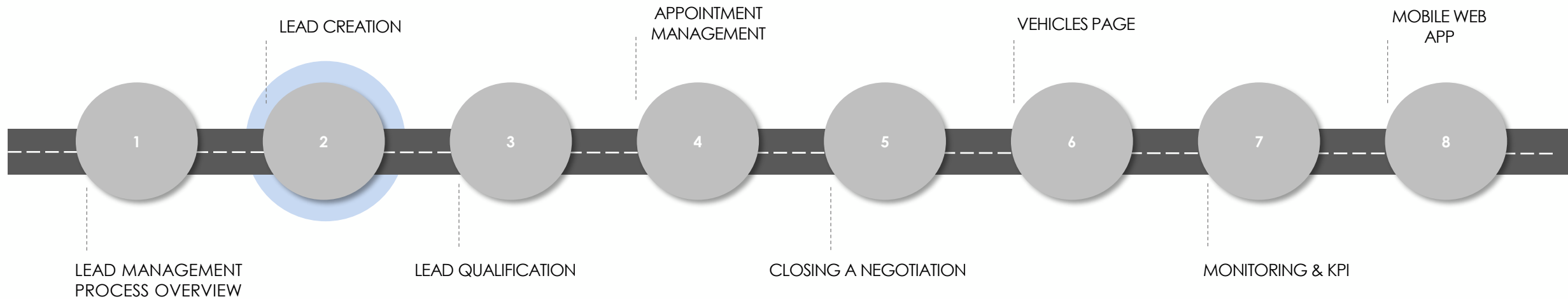
1. These fields are dedicated to entering **information relating to the contact phase**. You can enter up to 5 contact attempts in Salesforce, but you must record at least 1 contact attempt to change Lead Status.
2. “**Close no Sales Reason**” is dedicated to closing Leads for which no appointment could be fixed. The Close No Sale Status requires specifying the «Close No Sale Reason» for closing the Lead.
3. The field “**Lead Management Notes**” can contain the free notes of the dealer. The field is **mandatory to close the lead “In Sale”** without an appointment or “No Sale” with Close No Sale Reason – Other.

The screenshot displays the 'Qualification Details' section for an 'Aftersales Lead' (Test004 Test004). The interface includes a top navigation bar with 'Aftersales Leads', 'Vehicles', 'Reports', and 'Dashboards'. The main content area shows the lead details and a table for 'Aftersales Lead History (2)'. The 'AS Qualification Details' section is expanded, showing five rows for 'Dealer Contact Attempt' and 'Dealer Date Attempt'. Below this are fields for 'First Contact Attempt', 'First Contact Attempt Date', 'Lead Qualif. / Management Date', 'Close No Sale Reason', and 'Lead Management notes'. Three blue dashed boxes with numbered circles (1, 2, 3) highlight specific areas: box 1 highlights the 'AS Qualification Details' section, box 2 highlights the 'Close No Sale Reason' field, and box 3 highlights the 'Lead Management notes' field.

Date	Field	User	Original...	New Va...
2/3/2...	Created	User176...		
2/3/2...	Date As...	User176...	2/3/20...	2/3/20...



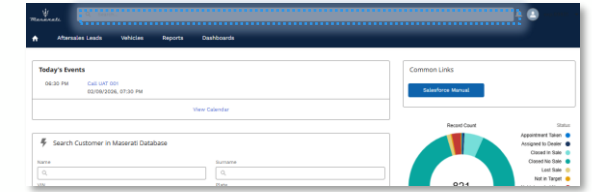
Lead creation



Lead Creation



Before creating a new lead, always check whether it **already exists** in Salesforce through the dedicated intelligent **global search tab** in Homepage. You can search for all **main profile data** (i.e., name, surname, e-mail address, mobile, etc.)



1. To create a new lead, click on the “Aftersales Leads” tab, then click on the “**New**” button on the resulting page.

New Aftersales Lead

AS Lead Details

- Status: New
- AS Campaign: --None--
- AS Campaign Notes: --None--
- Source: --None--
- Recontacted: ☐
- Master AS Lead: --None--
- Customer: --None--

Request Details

- * First Name:
- * Last Name:
- * Email Address:
- * Contact Number:
- * Other Phone:
- * AS Lead Name: Automatically filled in
- * Country: --None--
- * State: --None--
- * City:
- * ZIP:

Direct Marketing

- * Direct Marketing: --None--
- * Profiling: --None--
- * by Email: --None--
- * by Phone: --None--
- * by Post: --None--
- * by SMS/MMS: --None--
- * by Fax: --None--
- * by Social: --None--

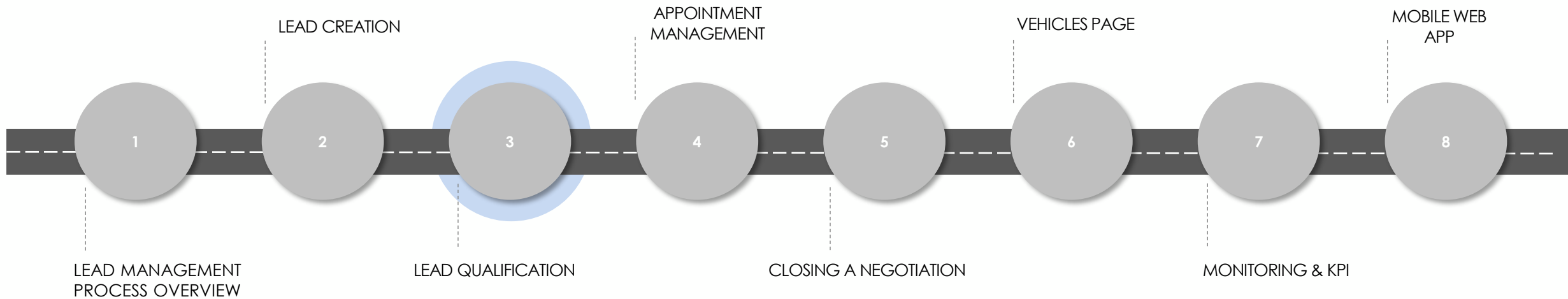
Buttons: Cancel, Save & New, **Save**

2. When the pop-up appears, fill in the **mandatory fields**, marked with an asterisk (*). Once filled in, these fields will turn yellow.

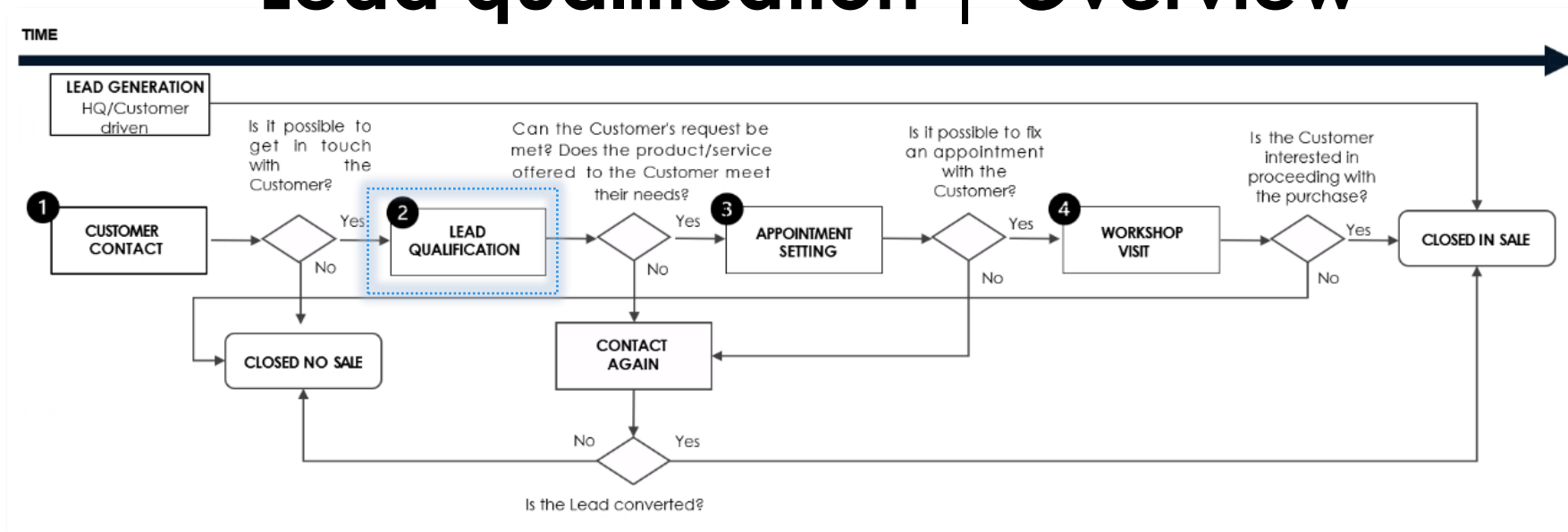
3. Click “**Save**” to complete the first step of the process.



Lead qualification



Lead qualification | Overview



The qualification process is a **key moment of the Lead management process** and requires the active involvement of the Customer to:

- complete the definition of the Customer's needs and requirements
- verify the customer's interest in the presented offer
- check the Customer's willingness to make an appointment with the Dealer

The qualification process starts when contact is made with the Customer and ends when all the elements necessary to be able to offer (or not) an appointment have been collected.

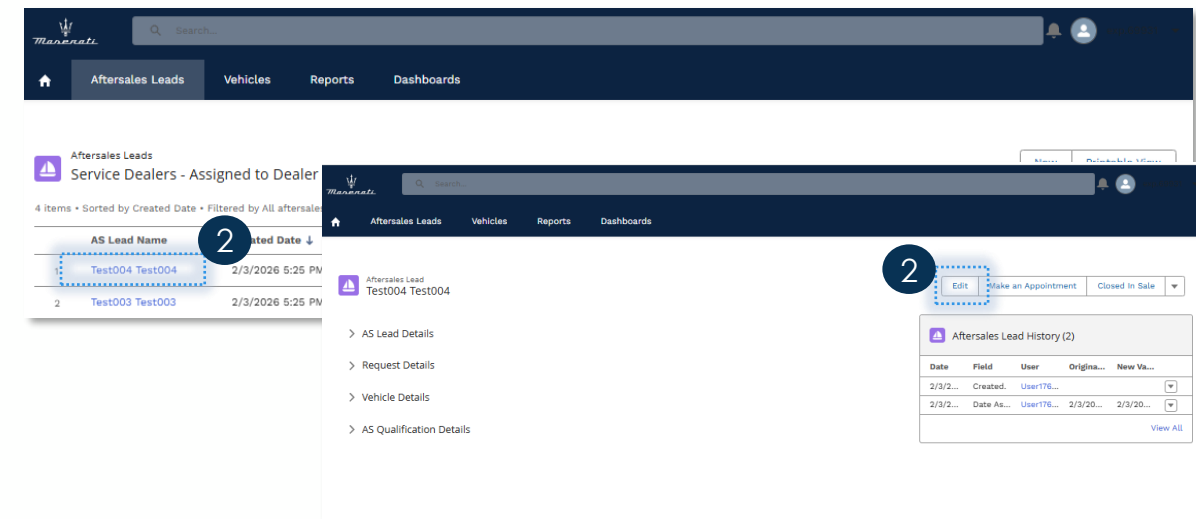
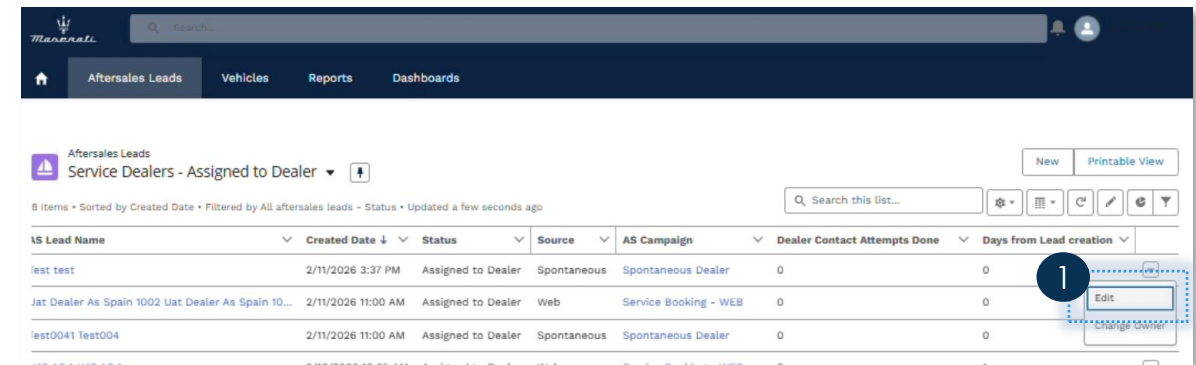
Using the Customer and vehicle information available in Modis , the Dealer can pre-qualify the Customer before contacting them to increase the likelihood of success.



Lead Qualification | Edit an existing lead

An existing Lead can be edited in two different ways:

1. You can edit a Lead directly from the **Aftersales Leads List View** by locating the desired record and selecting it from the list.
2. Alternatively, you can edit a Lead by clicking on the **Lead Name** on the list view to open the record page and then clicking the **"Edit"** button.
3. Updating the necessary fields.
4. Clicking **Save** to confirm the changes.



The screenshot shows the 'Edit Test test' form. A red dashed box with a circled '4' points to the 'Save' button at the bottom right. The form contains various fields for updating lead details, including 'AS Lead Details', 'Request Details', and 'Contact Information'.



Lead Qualification | Contact attempt

At least 1 contact attempt must be made and recorded (Dealer Contact Attempt 1) in Salesforce in the Qualification Details section of the Lead being managed.



1. Verify which **Available Channels** were selected during the Lead creation. If any changes are required, click the **pencil icon (Edit icon)** next to the field to update the selected channels.

Once the contact attempt has been completed, navigate to the **AS Qualification Details** section within the Lead record page > Click the **pencil icon (Edit icon)** next to the relevant contact attempt checkbox field.

2. Tick the checkbox to record that the contact attempt has been performed.
3. Click **Save** to confirm the update.
4. After saving, Salesforce automatically populates the corresponding **"Dealer Date Attempt #"** field with the date and time of the recorded attempt.

AS Qualification Details

Dealer Contact Attempt 1 ☒

Dealer Date Attempt 1 2/11/2026 3:57 PM

Note: If after repeated attempts appropriately distributed over time (and recorded in Salesforce) you are unable to make contact with the Customer, end Lead management with **"Closed No Sale"** (View Manual section: "Closing a Negotiation").

AS Lead Details

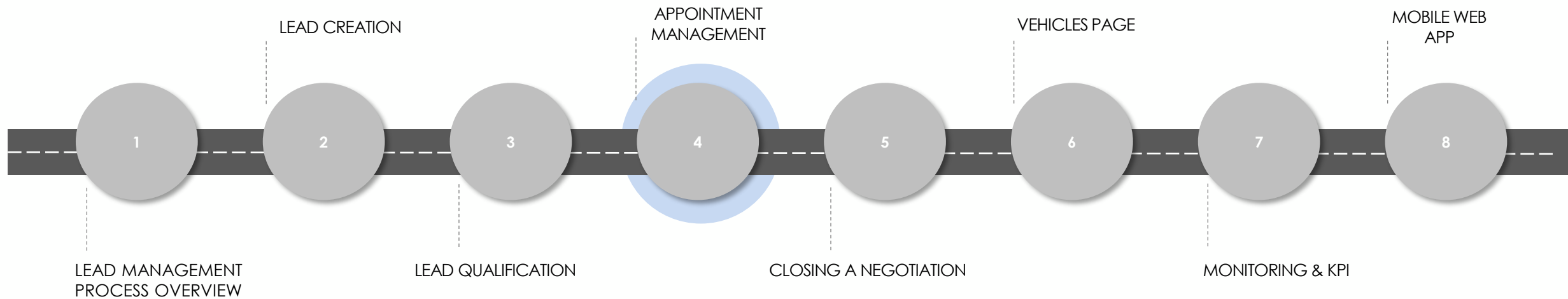
Direct Marketing ☒

AS Qualification Details

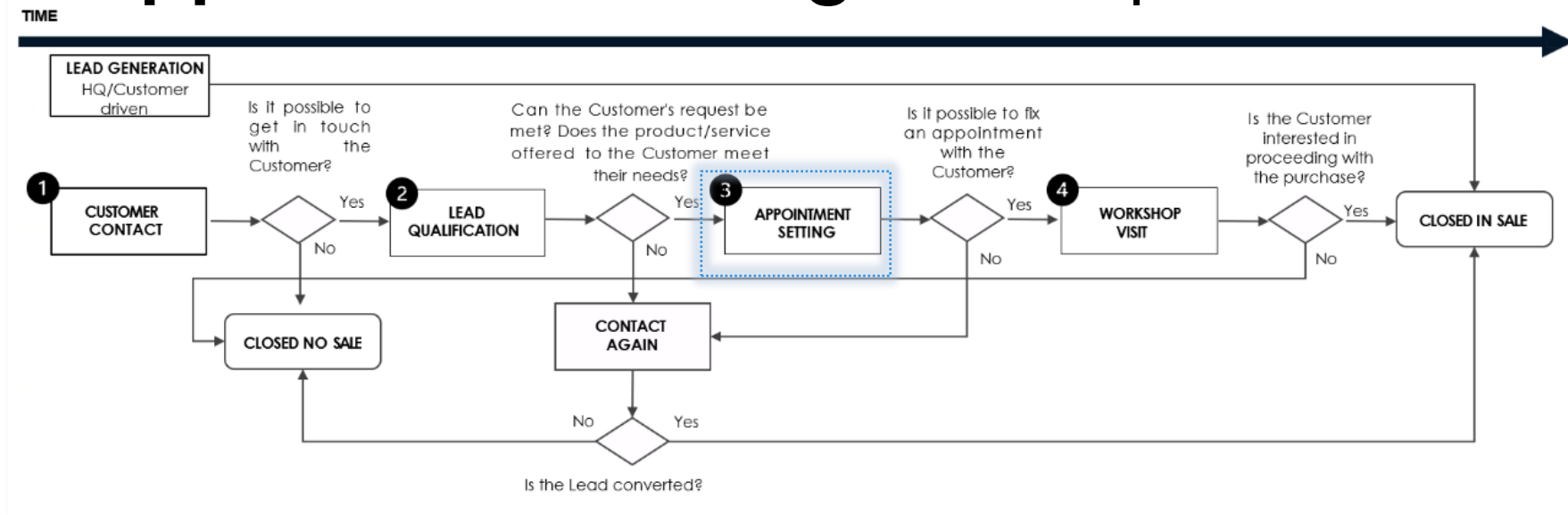
Dealer Contact Attempt 1 ☒



Appointment management



Appointment management | Overview



If the **Lead Qualification is successfully carried out**, i.e. all conditions are met to serve the Customer and the car:

- The Customer's car is included in offered/requested Campaign/Service
- The Customer is currently the owner of the associated car
- The timeframe for the request/offer can be respected

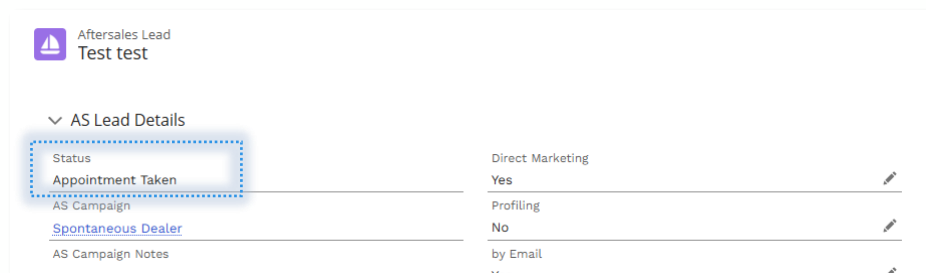
It is possible to proceed with the offer of an appointment agreed with the Customer.



Appointment management

1. To Schedule an Appointment, open the relevant Lead record page and click the **“Make An Appointment”** button.
2. **Select** the agreed appointment **date** and **time**.
3. Check the tick in the checkbox is inserted to **send a reminder** email to the Customer.
4. Click **Save** to confirm and schedule the appointment.

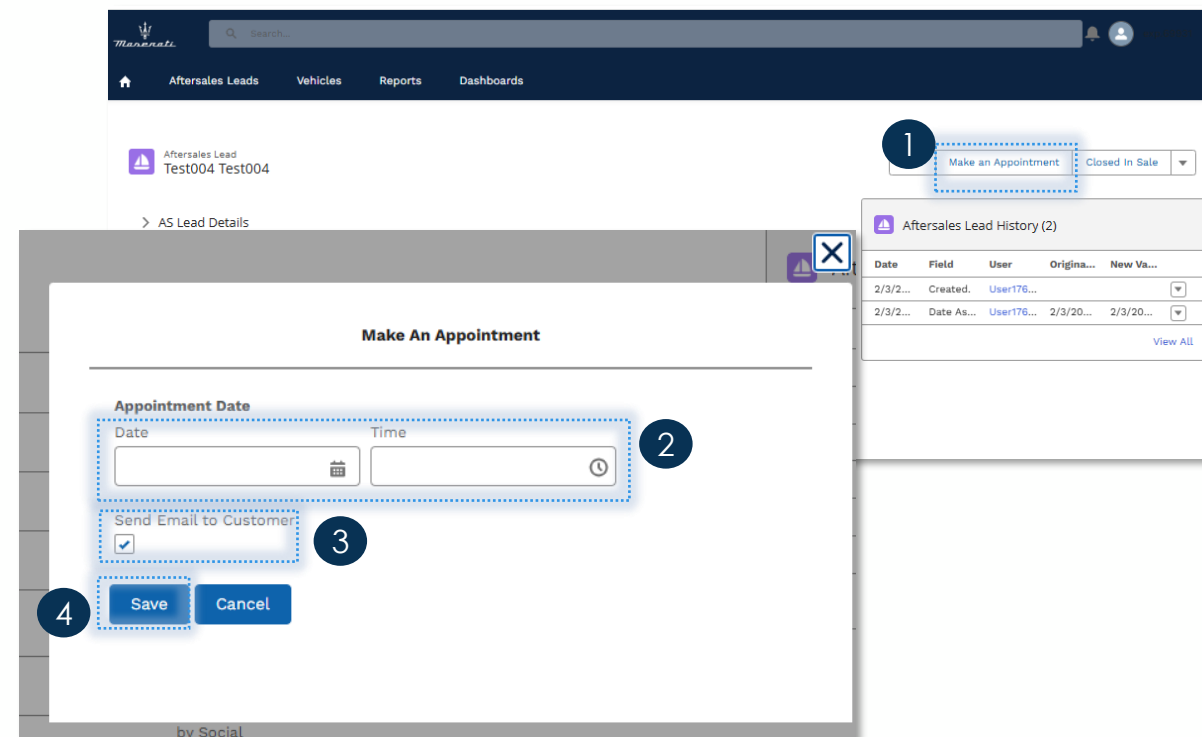
The Status will automatically change from “Assigned to Dealer” to **“Appointment Taken”**.



Aftersales Lead
Test test

AS Lead Details

Status	Direct Marketing
Appointment Taken	Yes
AS Campaign	Profiling
Spontaneous Dealer	No
AS Campaign Notes	by Email



Make An Appointment

Appointment Date

Date Time

Send Email to Customer:

Save Cancel

by Social

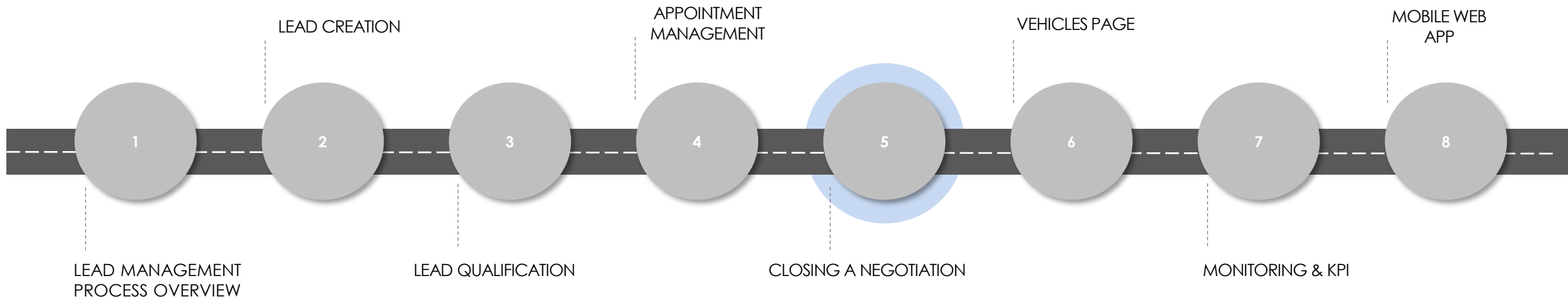
When the appointment is scheduled, checking the flag, Salesforce will send an **email confirming the appointment to the Customer**. A reminder email will be sent the day before the appointment. Two equivalent emails will **also be sent to the Dealer**.



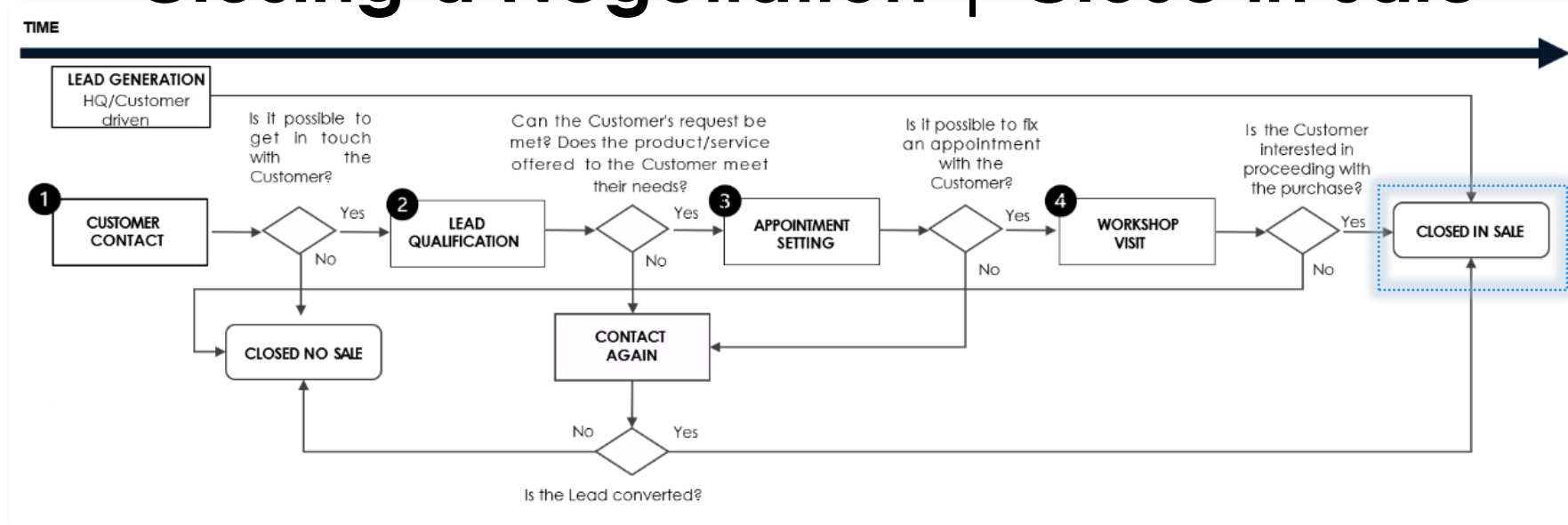
Note: If “Appointment Taken” is not updated within 60 days, the Lead Status automatically changes to **“Lost Sale”**.



Closing a negotiation

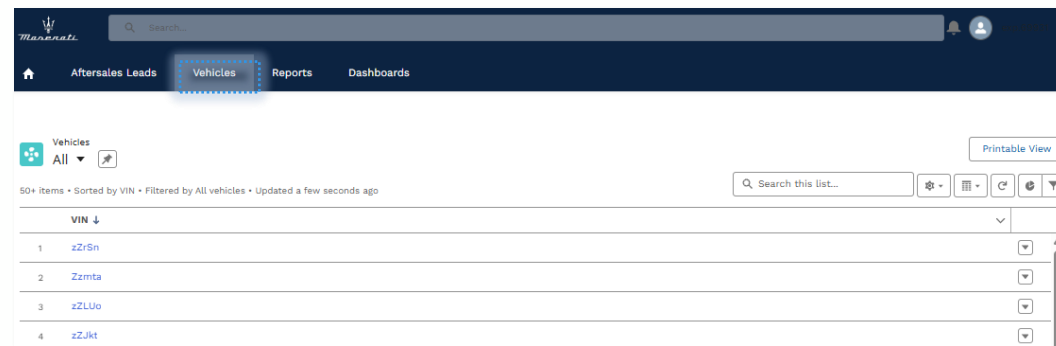


Closing a Negotiation | Close in sale



Once the **Customer's request is satisfied**, the lead can be closed as "Closed In Sale" by **entering a correct VIN as mandatory**.

If needed, you can consult the VINs associated with vehicles by accessing the "Vehicles" page from the Navigation Bar.



Closing a Negotiation | Close in sale

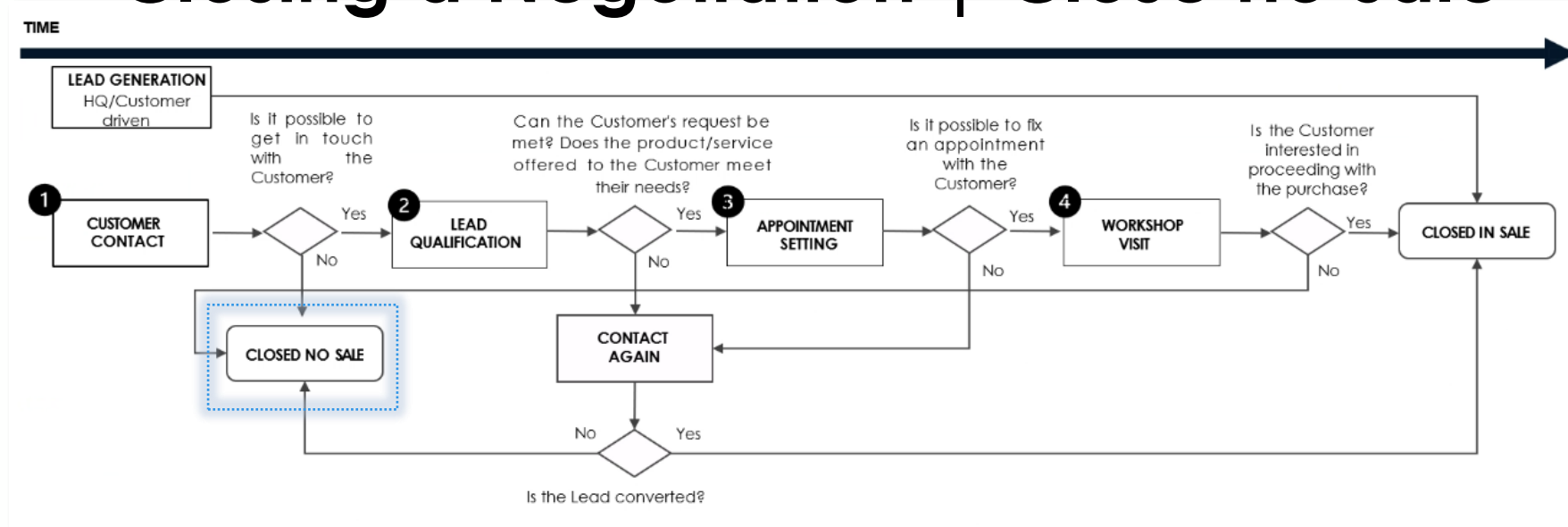
1. Navigate to the “**Vehicle Details**” section within the Lead record page and click the **pencil icon** (Edit icon) next to the **VIN field** to enter the correct VIN. Then click **Save**.
2. Click the “**Close In Sale**” button at the top right of the page.

After completing this action, the **Lead Status** is updated to “**Closed In Sale**.”

Date	Field	User	Origin...	New Va...
2/17/20...	Appoin...	AS CAR...		2/17/20...
2/17/20...	Calls...	AS CAR...		2/17/20...
2/17/20...	Status	AS CAR...	Assign...	2/17/20...
2/17/20...	Send E...	AS CAR...		2/17/20...
2/17/20...	Dealer ...	AS CAR...		2/17/20...
2/17/20...	Appoin...	AS CAR...	2025-G...	2/17/20...



Closing a Negotiation | Close no sale



A Lead must be closed as “**Closed No Sale**” in the following scenarios:

1. If, after repeated contact attempts appropriately distributed over time (and properly recorded in Salesforce), you are unable to reach the Customer.
2. If the qualification step results in a negative outcome.
3. If the conditions required to schedule an appointment are not met.

In all the above cases, the Lead management process must be ended by selecting “**Closed No Sale.**”



Closing a Negotiation | Close no sale

1. Open the relevant Lead record page and click the **"Close No Sale"** button (at the top of the page).
2. Select the **appropriate Reason** from the available options:
 - No privacy consent in DMS
 - Not eligible for product / offer
 - Trade in new vehicle
 - Not Current Owner / Vehicle Sold
 - Leasing / rental / trader
 - Owner is not driver
 - Customer declined the offer / quote
 - Wrong number / phone off / busy
 - Other
3. Click **Save** to confirm.

After saving, the **Lead Status is automatically updated** to **"Closed No Sale"**, and the Lead management process is ended.

Aftersales Lead
Test0061 Test0061

AS Lead Details

Status: Assigned to Dealer

Direct Marketing: Yes

Profiling: AS Campaign

Closed No Sale

Close No Sale Reason: --None--

Save Cancel

Aftersales Lead History (6+)

Date	Field	User	Origina...	Test0061
2/10/2...	First N...	AS CAR...	Test006	Test0061
2/10/2...	Last Na...	AS CAR...	Test006	Test0061
2/10/2...	AS Lea...	AS CAR...	Test00...	Test00...
2/10/2...	Created.	AS CAR...		
2/10/2...	Owner	AS CAR...	AS CAR...	AS CAR...
2/10/2...	AS Lea...	AS CAR...	Automa...	Test00...

View All

Notes:

- If the reason **"Other"** is selected, it is mandatory to complete the **"Lead Management Notes"** field before saving.
- If the reason **"Not Current Owner / Vehicle Sold"** is selected, it is mandatory to **enter the End Date of Ownership** in order to proceed and save the record.



Aftersales Lead
Test003 Test003

AS Lead Details

Status: Closed No Sale

Direct Marketing: Yes

Profiling: AS Campaign



Closing a Negotiation | Contact again 1/2

Even if a Lead has been closed as “**Closed No Sale**,” it is still possible to plan a future contact with the Customer.

A Customer who is not interested today may become interested at a later stage, especially if conditions or offers change. The Dealer may schedule a **call-back or follow-up contact** whenever there is a potential opportunity for a future sale of products or services.

1. Open the Lead record currently in “**Closed No Sale**” status and click the “**Contact Again**” button at the top of the record page.
2. Select the desired recontact date using the calendar.
3. Click **Save** to confirm.

The screenshot shows the Aftersales Leads system interface. The main page displays lead details for 'Test001 Test001' with status 'Closed No Sale'. A 'Contact Again' modal is open, showing a date selection calendar for February 2026. A 'Recontacted Date' input field is highlighted with a blue dashed box and a '1' in a blue circle. The calendar is highlighted with a blue dashed box and a '2' in a blue circle. The 'Save' button is highlighted with a blue dashed box and a '3' in a blue circle. An 'Aftersales Lead History' table is visible on the right, showing a list of leads with columns for Date, Field, User, and Original.

Date	Field	User	Original
2/12/20	Status	AS CAR...	Assigne...
2/12/20	Close N...	AS CAR...	Trade i...
2/12/20	Change...	AS CAR...	2/12/20...
2/12/20	Dealer ...	AS CAR...	2/12/20...
2/12/20	Created.	User176...	2/12/20...
2/12/20	Date As...	User176...	2/12/20...



Closing a Negotiation | Contact again 2/2

What Happens After Saving:

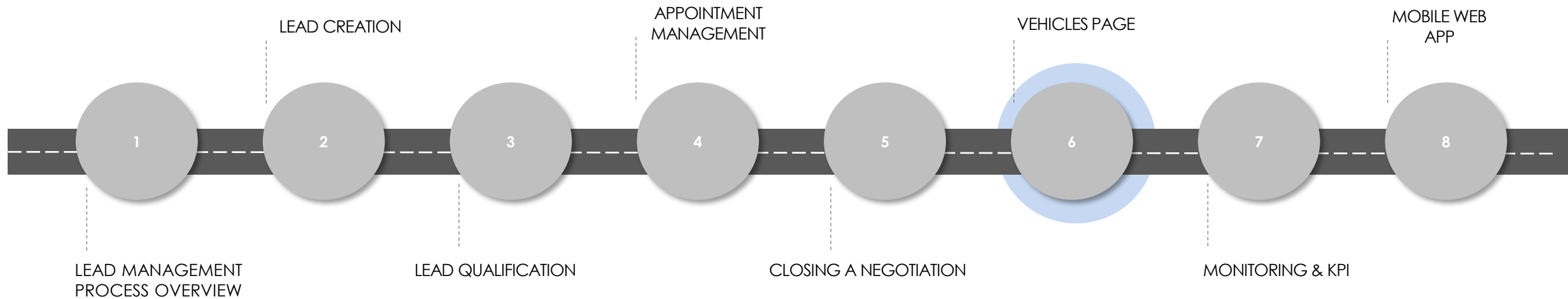
- The Lead Status remains “Closed No Sale” with:
 - Reason Category: “**Not Interested Now**”
 - Close No Sale Reason: “**Contact Again**”
- The current Lead management process is ended.
- Once the selected recontact date is reached, **Salesforce automatically creates a new Lead** with:
 - Status: “Assigned to Dealer”
 - The “Recontacted” checkbox flagged
- The new Lead can be found in the “Assigned to Dealer” List View.
- At this point, you can contact the Customer again and propose a new appointment.

The screenshot displays the Marshall CRM interface. The top navigation bar includes 'Aftersales Leads', 'Vehicles', 'Reports', and 'Dashboards'. The main content area is titled 'AS Qualification Details' and contains several fields for lead management, including 'Model Description', 'Warranty Start Date', 'Warranty End Date', 'Avg KM Customer', 'Current Mileage', 'Dealer Contact Attempt 1' through '5', 'First Contact Attempt', and 'First Contact Attempt Date'. The 'Close No Sale Reason' dropdown menu is open, showing 'Contact Again' as the selected option. The 'Lead Qualif. / Management Date' is set to '2/12/2026 10:11 AM'.

Note: The newly created Lead will **contain the name of the previous Lead in the “Master AS Lead” field**. By selecting this name, you can access and review all information related to the original Lead.



Vehicles page



Vehicles page | Overview

The Vehicle Page allows users to consult detailed information related to vehicles associated with Leads and Customers.

1. Navigate to the Navigation Bar and click on **“Vehicles.”**

Upon accessing the Vehicles section, the landing page displays a **list view** containing the **VINs** (Vehicle Identification Numbers).

2. From the list view, click on a specific **VIN** and you will be redirected to the **Vehicle Record Page**.

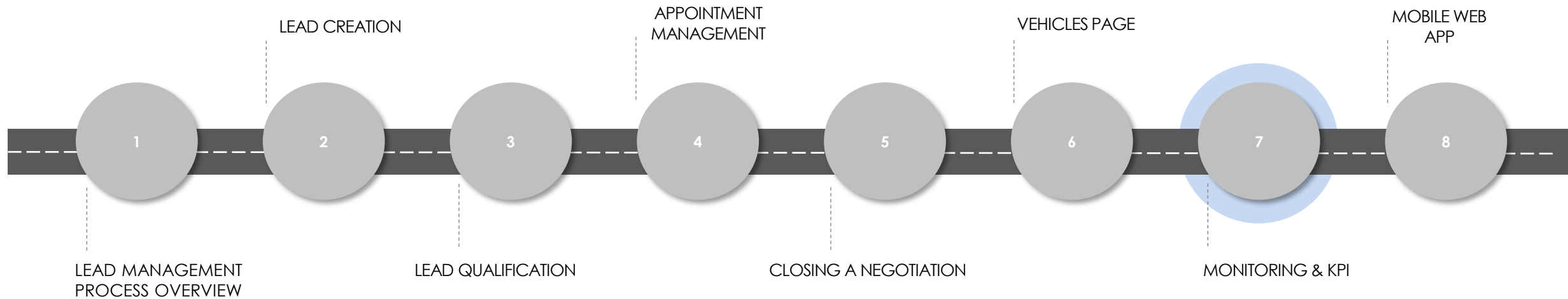
3. On this page, you can view:
 - Detailed vehicle information
 - Related records displayed on the right-hand side, including:
 - Ownerships
 - Opportunities
 - Warranties
 - Vehicle History

The screenshot displays the 'Vehicles' page in a web application. The top navigation bar includes 'Aftersales Leads', 'Vehicles' (highlighted with a red box and a red circle), 'Reports', and 'Dashboards'. Below the navigation bar, there is a search bar and a 'Printable View' button. The main content area shows a list of vehicles with columns for VIN, Model, and Status. A red box highlights the first row with VIN 'zZrSn', and a red circle with the number '2' is next to it. To the right of the list, a detailed vehicle record for the selected VIN 'zZrSn' is shown. This record includes sections for 'Tech Info', 'Production Info', and 'Financial Info'. On the far right, there are three summary cards: 'Ownerships (1)', 'Opportunities (1)', and 'Warranties (1)'. The bottom of the page features a footer with the company logo and contact information.

Note: The Vehicle Page is **consultative only**. It is **not possible to edit** any information or modify any elements within the Vehicle record.

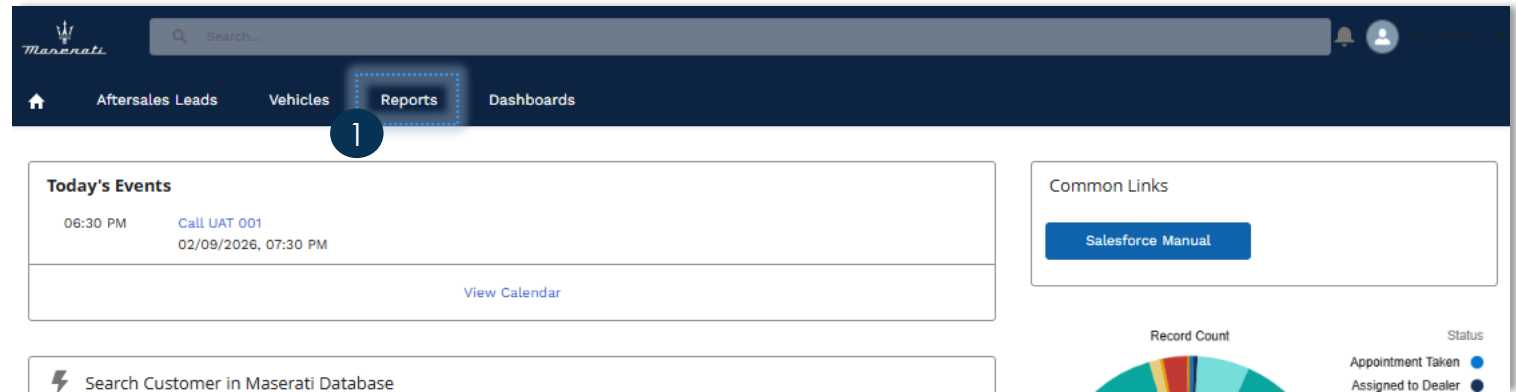


Monitoring & KPI



Monitoring & KPI | Reports management 1/3

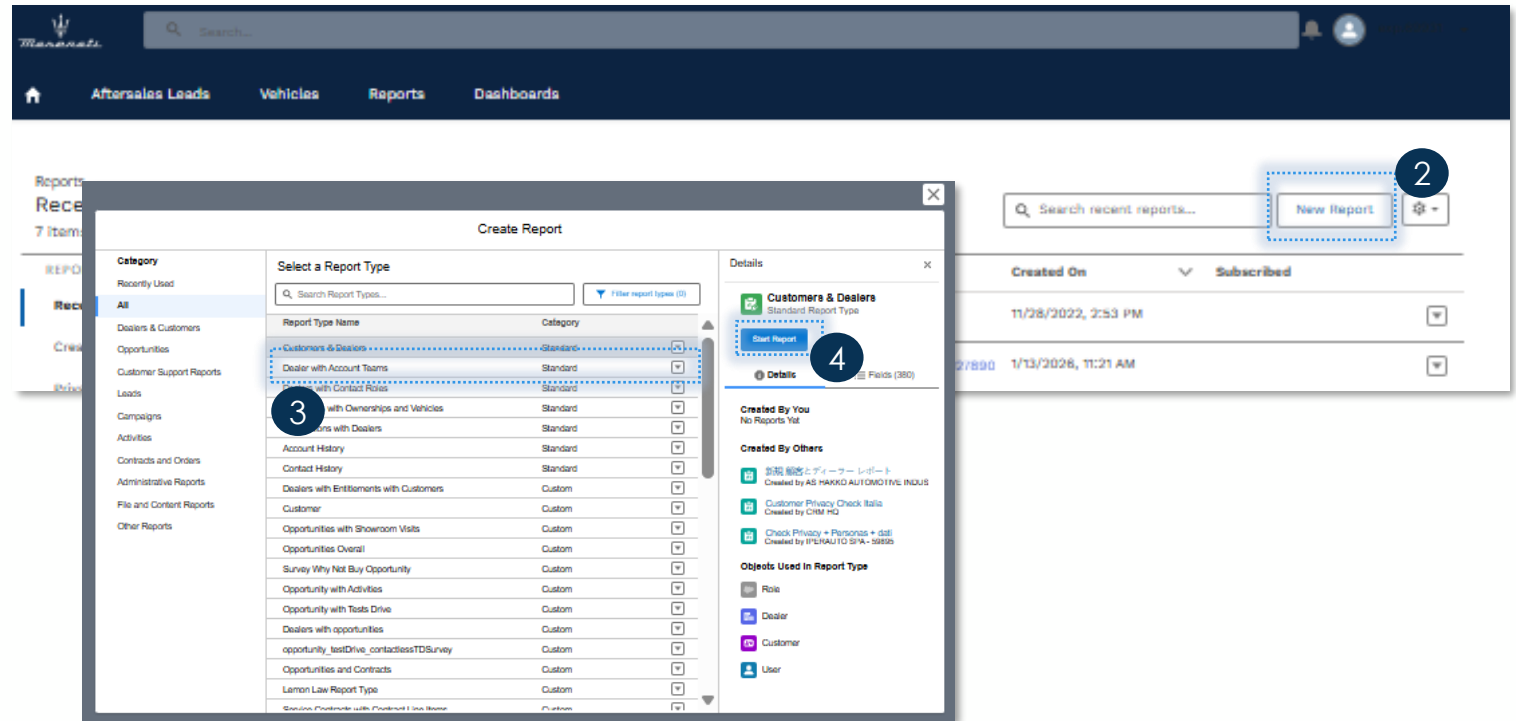
1. From the Salesforce homepage in the Navigation Bar, click on **Reports** to open the Reports home page.



2. In the Reports page, click **New Report**.

3. Select the **Report Type** according to the analysis you want to perform (i.e. Leads) and **click on the desired one**.

4. Click **Start Report**.



Monitoring & KPI | Reports management 2/3

5. **Select fields** to be included in the report columns. If necessary, create groups of rows / columns.

6. Select filters to include / exclude specific values (i.e. date, type of activity..etc) by clicking on **filter button**.

7. After making changes click on "**run**" button to refresh the report or "**save and run**" button to refresh and save the new version.

The screenshot shows the Marshall Aftersales Leads Report interface. The top navigation bar includes 'Aftersales Leads', 'Vehicles', 'Reports', and 'Dashboards'. The main content area displays a report titled 'New Aftersales Leads Report'. On the left, there is a 'Fields' panel with 'Groups' and 'Columns' sections. The 'Columns' section is highlighted with a blue dashed box and a callout '5', showing a list of fields with checkboxes: 'Aftersales Lead: AS Lead Name', 'Dealer Date Attempt 1', 'AS Campaign', 'Email Address', 'First Name', and 'Last Name'. The 'Filters' section is also highlighted with a blue dashed box and a callout '6', showing a search bar and a 'Filter' button. The main table displays a list of records with columns: 'Aftersales Lead: AS Lead Name', 'Dealer Date Attempt 1', 'AS Campaign', 'Email Address', 'First Name', and 'Last Name'. The table is previewing a limited number of records. In the top right corner, there are buttons for 'Save & Run', 'Save', 'Close', and 'Run', with a callout '7' pointing to the 'Run' button. The 'Run' button is highlighted with a blue dashed box.

	Aftersales Lead: AS Lead Name	Dealer Date Attempt 1	AS Campaign	Email Address	First Name	Last Name
1	TestINT TestINT001	2/2/2026 9:00 AM	Spontaneous Dealer	test@test001.invalid	TestINT	TestINT001
2	TRVLAs2x2o000000JZ#	11/25/2020 4 59 PM	AS Winter Promo	test@test.coma2x2o000000JZ#	Zydyi	Fgryfi
3	luAKGa2x2o000000JZgY	11/25/2020 12 47 PM	AS Winter Promo	test@test.coma2x2o000000JZgY	Tuvqtp	Dntfmd
4	SqBFa2x2o000000JZhC	11/24/2020 12 43 PM	AS Winter Promo	test@test.coma2x2o000000JZhC	Anugmh	Memkox
5	VNjHqa2x2o000000JZhq	11/16/2020 5 20 PM	AS Winter Promo	test@test.coma2x2o000000JZhq	Cdebgv	Rpqivr
6	sBGEQa2x2o000000JZJS	11/16/2020 5 22 PM	AS Winter Promo	test@test.coma2x2o000000JZJS	Bcqbca	Vdrwxw
7	pMlyka2x2o000000JZnU	11/26/2020 12 09 PM	AS Winter Promo	test@test.coma2x2o000000JZnU	Oghgta	Mnugmf
8	hjsrha2x2o000000JZnZ	11/25/2020 5 06 PM	AS Winter Promo	test@test.coma2x2o000000JZnZ	Livgzn	Phlfbn
9	LeLpwa2x2o000000JZnt	11/24/2020 12 50 PM	AS Winter Promo	test@test.coma2x2o000000JZnt	Noxapc	Anugmh
10	GGPeoa2x2o000000JZeN	11/25/2020 5 08 PM	AS Winter Promo	test@test.coma2x2o000000JZeN	Sldth	Dntfmd
11	xJcwSa2x2o000000JZom	11/26/2020 12 19 PM	AS Winter Promo	test@test.coma2x2o000000JZom	Olwqew	Thbdsd
12	lzfOPa2x2o000000JZp6	11/26/2020 10 32 AM	AS Winter Promo	test@test.coma2x2o000000JZp6	Gvkrdq	Exensd
13	kfYKga2x2o000000Ja46	11/24/2020 12 59 PM	AS Winter Promo	test@test.coma2x2o000000Ja46	Hsrnjp	Ulrloc
14	dOrmvra2x2o000000Ja4Q	11/27/2020 12 34 PM	AS Winter Promo	test@test.coma2x2o000000Ja4Q	Zpgyfq	Bmruax
15	BDGua2x2o000000Ja6W	11/24/2020 12 39 PM	AS Winter Promo	test@test.coma2x2o000000Ja6W	Hfkdg	Fgryfi
16	VndkLa2x2o000000Ja6b	11/26/2020 10 19 AM	AS Winter Promo	test@test.coma2x2o000000Ja6b	Exensd	Xlugjd
17	pZYmwa2x2o000000Ja6g	11/25/2020 12 16 PM	AS Winter Promo	test@test.coma2x2o000000Ja6g	Noxapc	Ldnliw
18	hRaCSa2x2o000000Ja6i	11/25/2020 5 04 PM	AS Winter Promo	test@test.coma2x2o000000Ja6i	Gdykmk	Ldnliw



Monitoring & KPI | Reports management 3/3

8. The report is created and the user can also **change the order of the columns** by dragging them within the report .

9. It is possible to export the report by clicking on the arrow next to Edit and select **"Export"**.

10. A pop up will open where you can choose the export view (formatted report is recommended) and click again on “**Export**”.

[Home](#)
[Aftersales Leads](#)
[Vehicles](#)
[Reports](#)
[Dashboards](#)

Report: Aftersales Leads
New Aftersales Leads Report

[Enable Field Editing](#)

[Add Chart](#)

[Edit](#)

8

Total Records

830

	Aftersales Lead: AS Lead Name	Dealer Date Attempt 1	AS Campaign	Email Address	First Name	Last Name
1	TRvLaa2x000000JZf#	11/25/2020 4:59 PM	AS Winter Promo	test@test.coma2x000000JZf#	Zyzyl	Fgryff
2	lUAKGa2x000000JZgY	11/25/2020 12:47 PM	AS Winter Promo	test@test.coma2x000000JZgY	Tuvqtp	Dntfmd
3	SqIBFa2x000000JZhC	11/24/2020 12:43 PM	AS Winter Promo	test@test.coma2x000000JZhC	Anugmh	Memkcx
4						

9

Save

Export

Export View

Details Only

Export only the detail rows. Use this to do further calculations or for uploading to other systems.

Format

Excel Format .xls

Encoding

ISO-8859-1 (General US & Western Eun

Cancel

Export

10



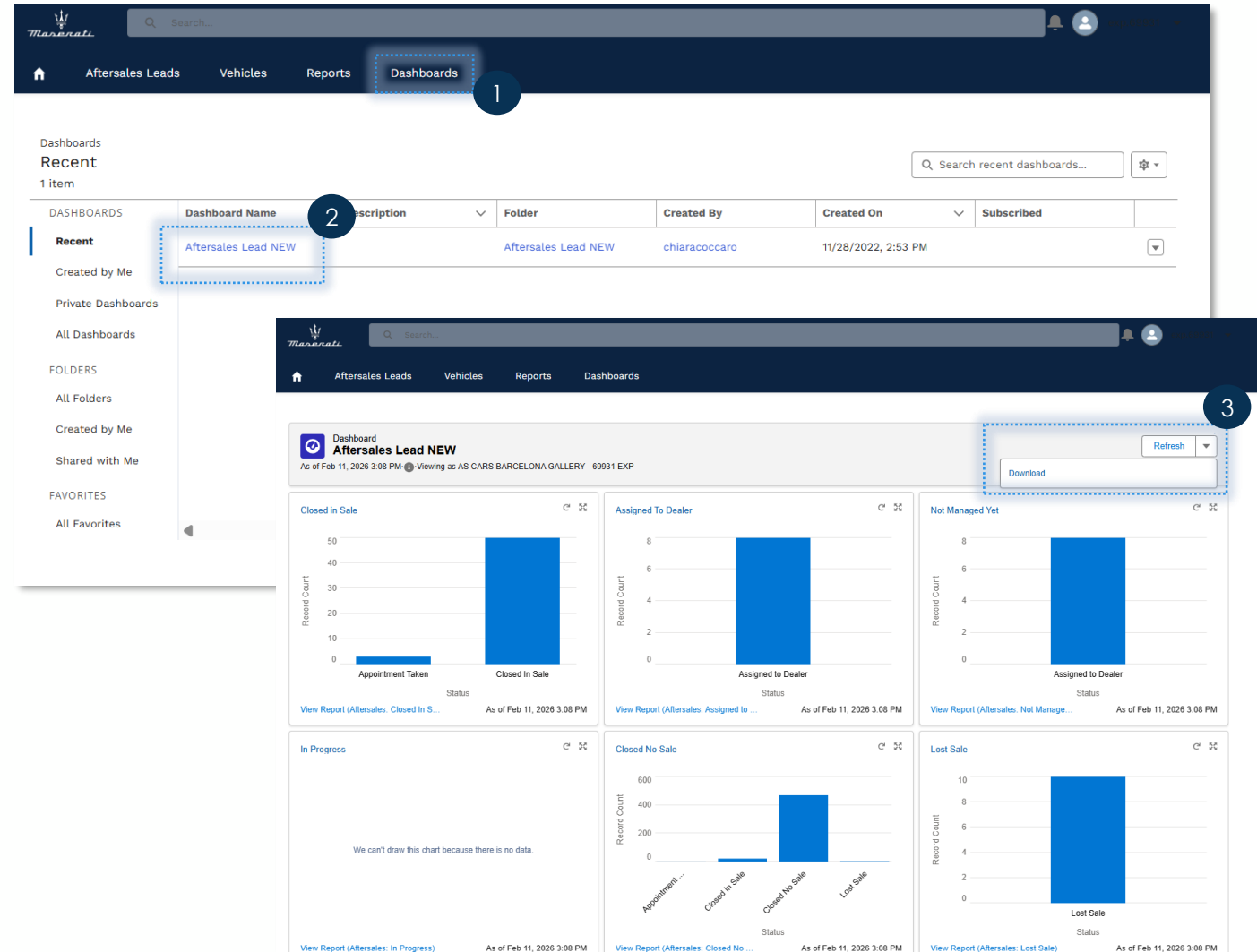
Monitoring & KPI | Dashboards

The **Dashboard** section provides a visual overview of key performance indicators and Lead management data.

1. To Access the Dashboard, navigate to the Navigation Bar and click on “**Dashboard.**”
2. To open a specific Dashboard, **click on the name** of the Dashboard you want to view.

3. Once you are on the selected Dashboard page, two action buttons are available:

- **Refresh**
Use this button to manually update the data displayed to ensure that the most recent data is shown.
- **Download**
Use this button to download the Dashboard.



Monitoring & KPI | SLA: Service Level Agreement

One of the key elements of Lead management is certainly the time factor.

Timely contact demonstrates the attention Maserati pays to its Customers and maximizes the Customer experience and loyalty.

The following SLAs have been implemented from 2022 to guarantee a level of Customer service in line with Maserati standards and to monitor performance in the management of the Aftersales Lead.



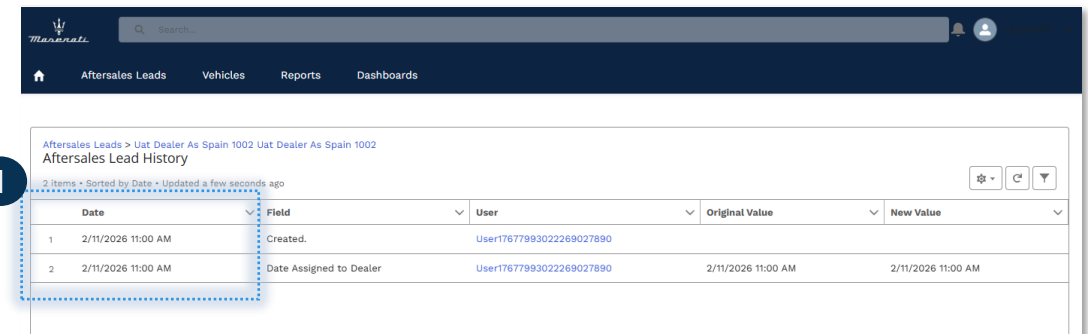
Monitoring & KPI | SLA 1: Time of first contact

This measures the Dealer's promptness to pick up Lead management and indicates the time elapsed between **when a Lead is assigned to the Dealer and the first attempt to contact the Customer.**

TARGET: 70% <= 1g (SLA: 70% of assigned Leads must be contacted within 24 calendar hours of assignment)

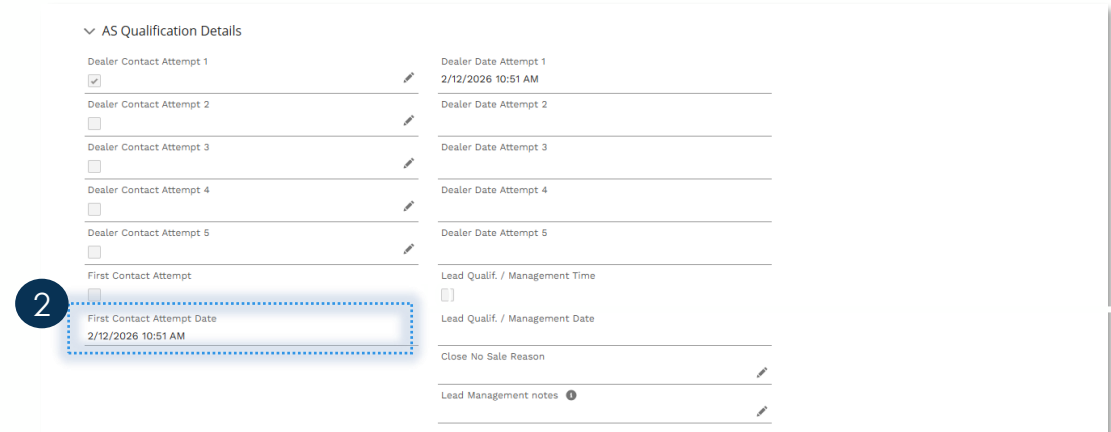
KPI measurement: Date/time of first contact attempt - Date/time of Lead assignment

1. The **date/time of assignment** is visible on the Lead page in the **Aftersales Lead History** section.



	Date	Field	User	Original Value	New Value
1	2/11/2026 11:00 AM	Created.	User17677993022269027890		
2	2/11/2026 11:00 AM	Date Assigned to Dealer	User17677993022269027890	2/11/2026 11:00 AM	2/11/2026 11:00 AM

2. The **date/time of the first contact** is visible on the Lead page in the **Qualification Details**.



AS Qualification Details

Dealer Contact Attempt 1 ☒ 2/12/2026 10:51 AM

Dealer Contact Attempt 2 ☐

Dealer Contact Attempt 3 ☐

Dealer Contact Attempt 4 ☐

Dealer Contact Attempt 5 ☐

First Contact Attempt ☐ 2/12/2026 10:51 AM

Lead Qualif. / Management Time

Lead Qualif. / Management Time

Close No Sale Reason

Lead Management notes



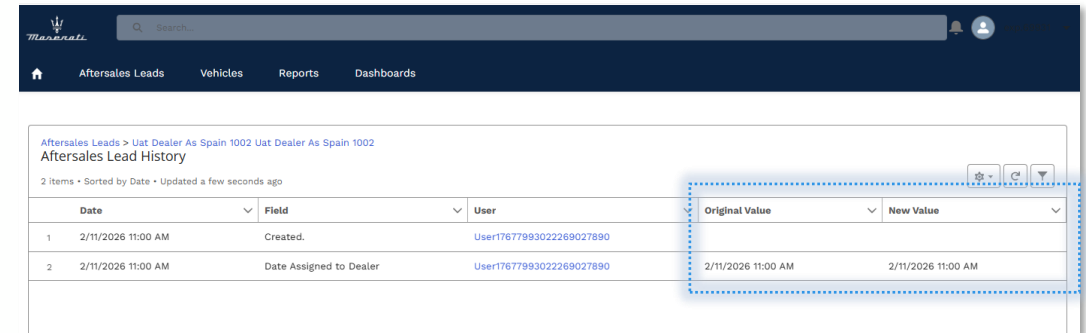
Monitoring & KPI | SLA 2: Qualification/Management time

This measures the Lead management time and expresses the time elapsed between when the **Lead is assigned to the Dealer and when the Lead is closed** (which occurs when a final Status is assigned*).

TARGET: 70% <= 10g (SLA: 70% of assigned Leads must be concluded within 10 calendar days of assignment)

KPI measurement: Date/time of Lead closure** - Date/time of Lead assignment

The assignment date/time and the closure date/time are visible on the Lead page in the Aftersales Lead History section



Date	Field	User	Original Value	New Value
2/11/2026 11:00 AM	Created.	User17677993022269027890		
2/11/2026 11:00 AM	Date Assigned to Dealer	User17677993022269027890	2/11/2026 11:00 AM	2/11/2026 11:00 AM

* Closed No Sale / Closed In Sale / Lost sale

** "Appointment Taken" is not a final Status. For this reason, the Dealer cannot close the Lead immediately after having scheduled the appointment and must respect the 10-day deadline. Please note that if "Appointment Taken" is not updated within 60 days, the Lead Status automatically changes to "Lost Sale". Entering a correct VIN is mandatory to close the Lead.



Monitoring & KPI | SLA 3: Fully managed Leads

This measures the number of **fully managed Leads** (in final Status*) in relation to the total number of Leads assigned during the previous 60 days.

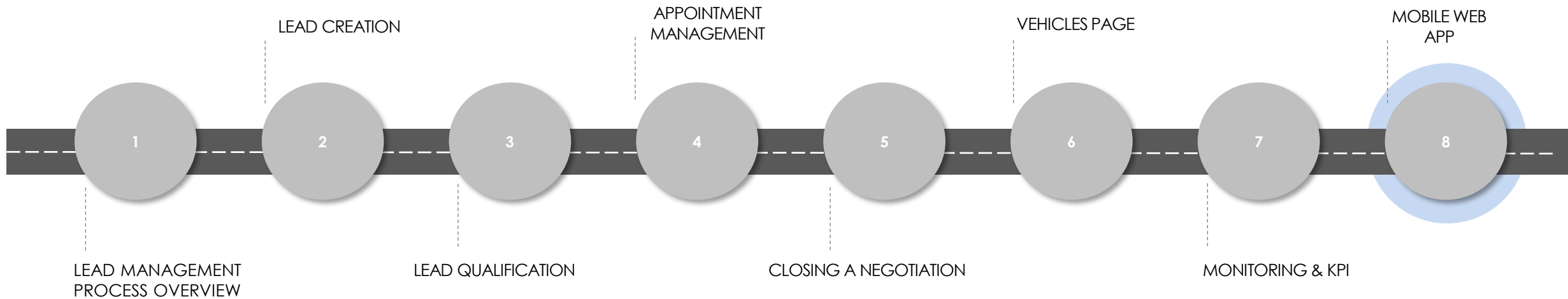
TARGET: 90% (90% of the Leads allocated in the previous 60 days must be in final Status* and therefore fully managed)

KPI MEASUREMENT: number of Leads in a FINAL Status / number of Leads assigned

* Closed No Sale / Closed In Sale



Mobile web app



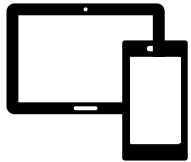
Salesforce mobile web app | Introduction



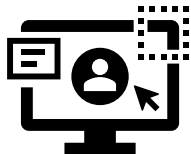
The Salesforce Mobile Web App is a **web-based application** and **does not require any download**. It can be accessed directly from a mobile browser **by logging in through MODIS CS+**. *For the best user experience and optimal performance, **Google Chrome** is the recommended browser.*



Access is supported on **both iOS and Android** devices.



The Mobile Web App is **available for smartphones and tablets**, with minor layout differences depending on the device.



Usage of the Mobile Web App is **recommended for users who are already familiar with Salesforce CRM functionalities**. For new joiners, it is recommended to start using Salesforce from the desktop version, following the CRM guidelines available in MODIS CS+.



Salesforce mobile web app | How to access

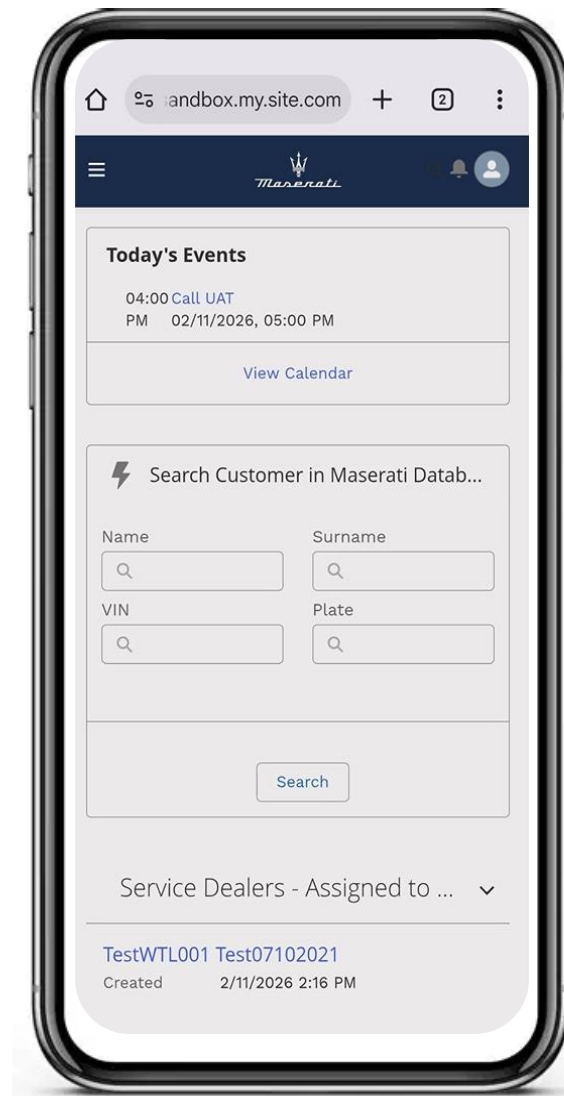


MODIS CS+

- ▶ To access the **Salesforce Mobile Web App**, users must:
- Open a **browser** on their device and access **MODIS CS+**.
 - Log in to **MODIS CS+**.
 - Click on the **CRM** tab.

The system **automatically redirects** the user to **Salesforce Experience Cloud Mobile Web App**.

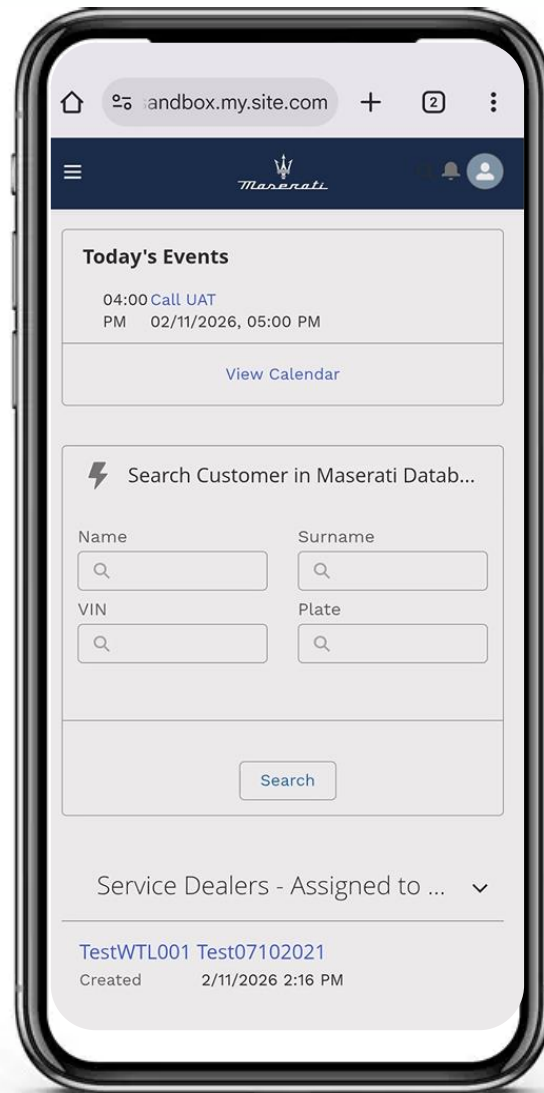
If you have more than one profile, select the Aftersales profile to continue



HOMEPAGE



Salesforce mobile web app | Features overview 1/2



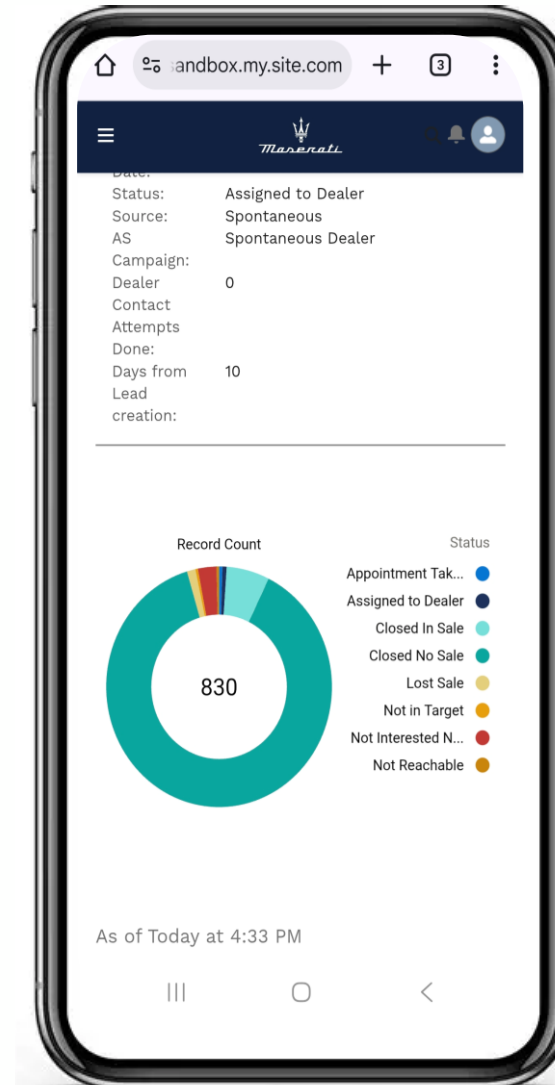
HOMEPAGE 1/2

Navigation Bar & Search

Today's Events

Search Customer

Lead List view

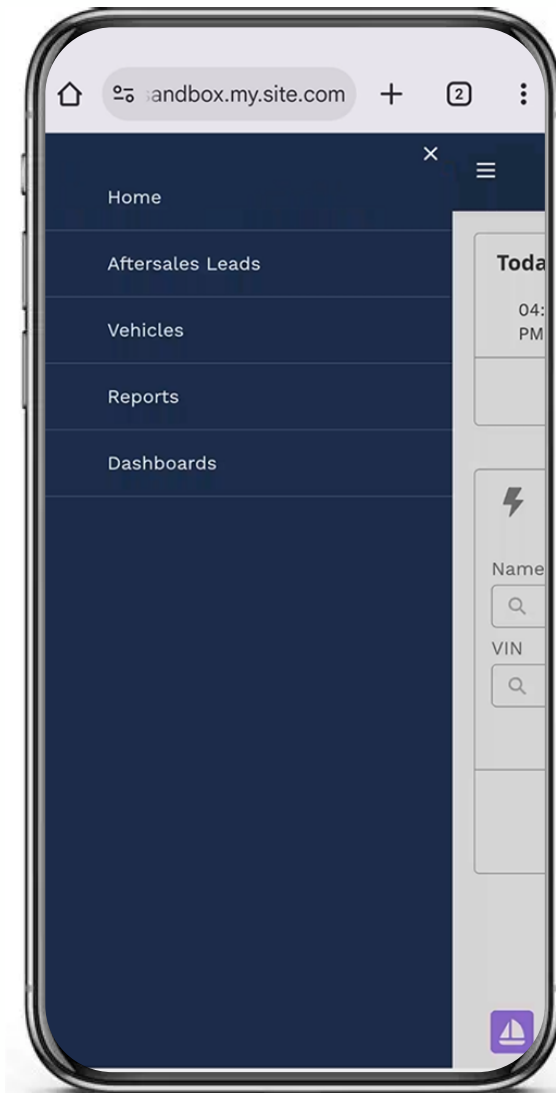


HOMEPAGE 2/2

Record Count



Salesforce mobile web app | Features overview 2/2



BURGER MENU



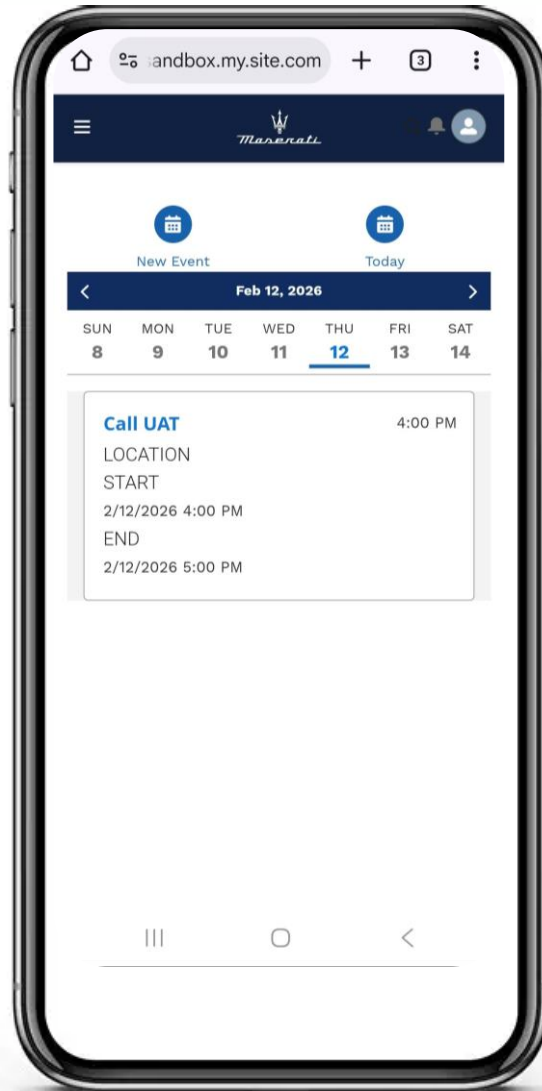
Navigation in the Mobile Web App is available through the **burger menu on the left side of the screen**. By opening the burger menu, users can access **the same main tabs available on the desktop version**:

- Home
- Aftersales Leads
- Vehicles
- Reports
- Dashboards

This ensures consistency between desktop and mobile navigation.



Salesforce mobile web app | Calendar

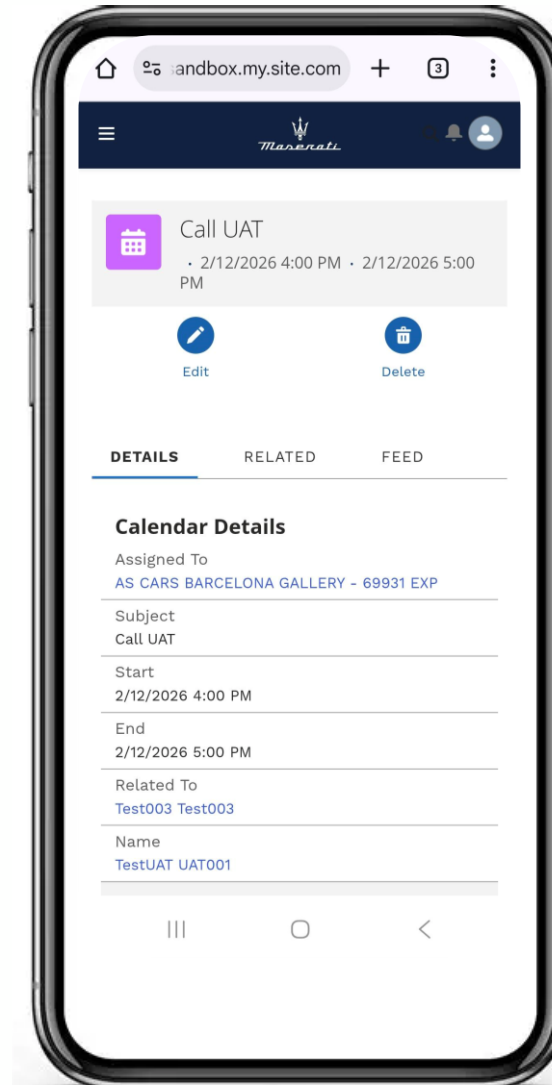


New Event

The **Calendar** allows users to manage appointments and activities.

From the Calendar page, it is possible to:

► **Create a new event** by selecting the desired date and time and entering the relevant details.

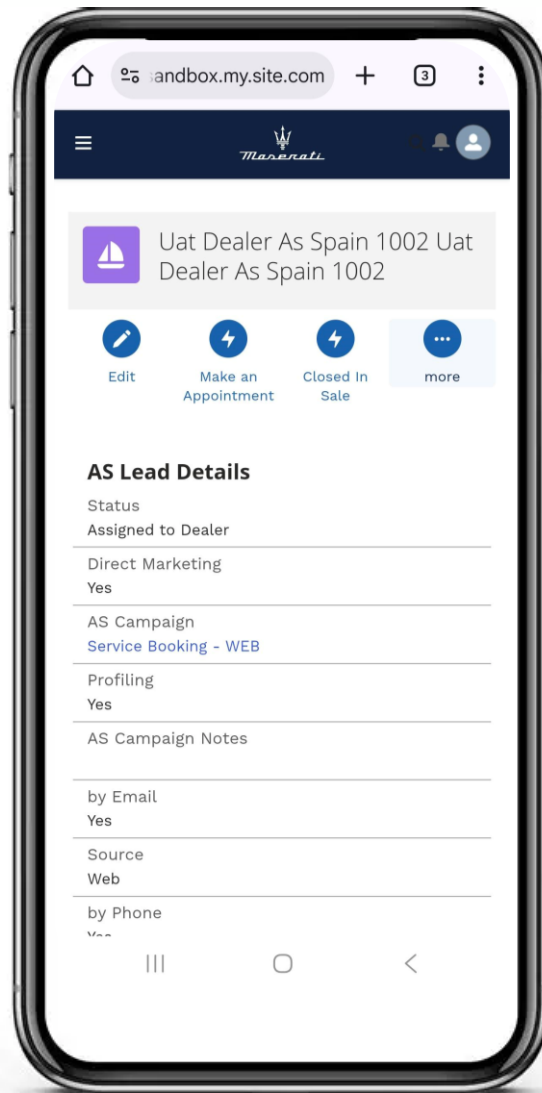


Existing event

► **Edit / Delete an existing event** by clicking on the scheduled activity and updating the necessary information.



Salesforce mobile web app | Lead view



Lead list view



When opening a specific object:

- Users can view the **List Views**, similarly to the desktop experience.
- By selecting a record from the list, they can access a **detailed view** of the record information.

From the record view, users can:

- **consult** all relevant information
- **edit existing records**
- **update fields** and manage ongoing activities

Note: On the Mobile Web App, **Creation of new records is not supported**. For creating new Leads, users must access Salesforce from the **desktop version**.



Glossary

Explanation of the terminology related to Aftersales Lead management



Glossary – Process overview

LEAD: Customer who is the owner of a Maserati car and who may be interested in using a product or service offered by your Maserati workshop or who makes an explicit request to be contacted because they are interested in a product/service. A Lead is a business opportunity for your dealership.

LEAD GENERATION process: the action of collecting from different channels and sources relevant data from an existing Customer who shows interest in Aftersales Services and Products.

HQ-Driven Lead: Maserati periodically reviews its fleet to identify Customers likely to benefit from targeted offers, even without an active request—for example, Service Reminder or Warranty End Reminder campaigns.

Customer-Driven Leads: created when a Customer submits a request via website forms or the Maserati Owner App. These must be prioritised.

AFTERSALES LEAD MANAGEMENT (ASLM) process: every Lead starts as 'Assigned to Dealer' and requires active management: contact, qualification, appointment and/or closure. Final statuses must be applied via Action Buttons and cannot be changed.

LEAD CONTACT: the first fundamental step. The goal is to turn interest into an opportunity. Contact should preferably be by phone unless the Customer requests otherwise. Attempts should be spaced across 2–3 days and at different times.

LEAD QUALIFICATION: the process of identifying the customer's needs and verifying whether they can be met. This requires direct contact to understand explicit or hidden needs.

LEAD APPOINTMENT: when a previously agreed appointment is logged in Salesforce, the Lead Status automatically updates to 'Appointment Taken'. This status is not final and expires after 60 days, so the Dealer must assign a final status: 'Closed In Sale' or 'Closed No Sale'.



Glossary – Lead status

STATUS (of the Lead): this provides an indication of the progress of the Lead in the management process. It can be initial, intermediate or final. Leads in final Status have been fully managed and require no further action. Leads in Initial and Intermediate Status require further action to be brought to the final Status.

Assigned to Dealer: all Leads, regardless of how they are generated or the type of campaign, are assigned to each Dealer in Salesforce. This is the main status under which Leads are managed.

Not Managed Yet: These are Leads with the status “Assigned to Dealer” for which no “Dealer Contact Attempt” has been recorded. No activity has yet been carried out.

In Progress: These are Leads with the status “Assigned to Dealer” that have at least one “Dealer Contact Attempt” recorded or are in “Appointment Taken” status. The management process has started but has not yet reached a final status.

Appointment Taken: identifies a Lead for which an appointment has been scheduled. It must be finalized as “Closed In Sale” or “Closed No Sale” within 60 days. Otherwise, if the Lead is not managed within 60 days, the Status automatically changes to “Lost Sale”.

Closed In Sale: all Leads with “Closed in Sale” status signaling a positive outcome of the lead management process. It requires dealer actively using the ACTION BUTTONS

Closed No Sale: all leads for which the “Closed No Sale Reason” field has been filled in signaling a lack of agreement in moving forward with the sales process. It requires dealer actively using the ACTION BUTTONS

Lost Sale: subgroup of Closed Lead automatically assigned by the system to Leads for which a final Status is not reached within 60 days of the assignment date.



Conclusion



You will find **this manual in the Salesforce homepage**, in the “Common Links” section



For any doubts, you can refer to crm@maserati.com



For any **questions** after the training or for any **issues** encountered during tool usage, that you cannot solve through manuals, please **open tickets** to **support in ModisCS+**.



THANKS

