eMaster™ USING THE SYSTEM

keyloop eMaster™
The data-driven digital tool designed to help you increase vehicle sales, finance renewals and customer retention

ALPHERA FINANCIAL SERVICES

WELCOME

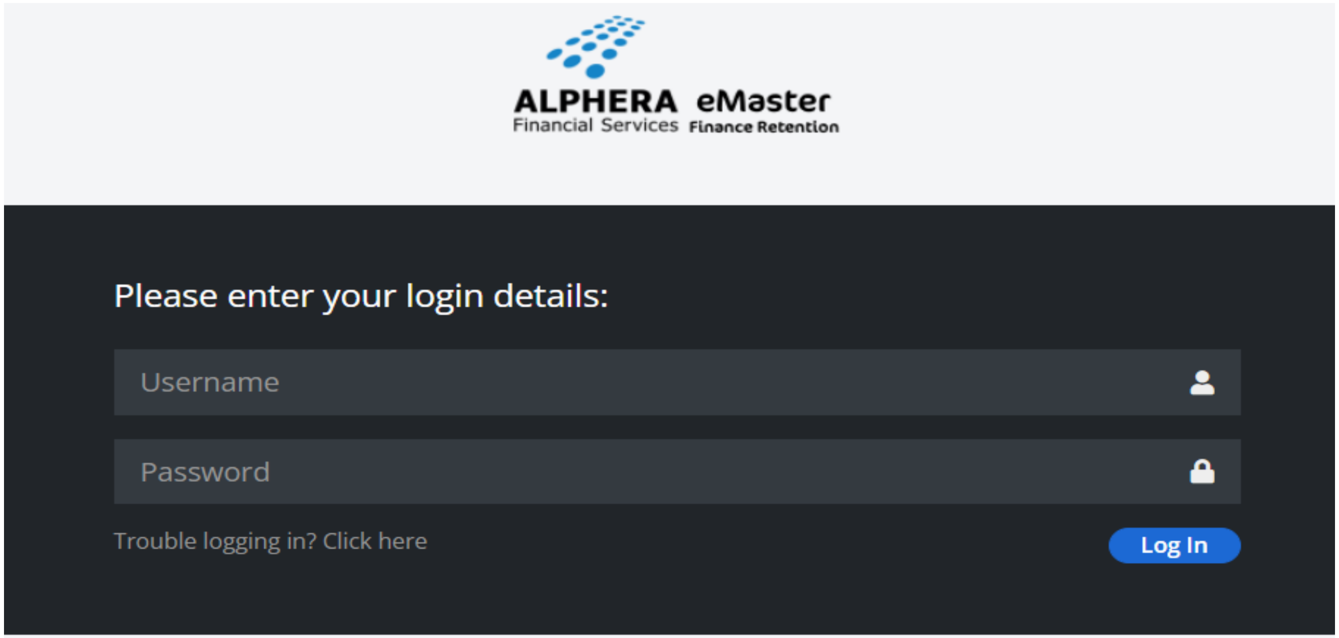
The **eMaster™** system provides you with a complete online customer retention solution which allows you to monitor and track all of your finance customers to ensure that you can resolicit them at exactly the right time. Whether it's an ongoing follow up program, a once off new car campaign or to find the right customer for a used car, eMaster™ will make the task simple and straightforward by using your live ALPHERA Finance data, which is updated daily, to target the **right customers**, with the **right product** with the **right deal** at the **right time**.

The system also allows you to put together new deals for both Select Finance and Hire Purchase Agreements, linking directly with data provided by ALPHERA Financial Services. This User Guide is designed to help you get the most from your system and will help answer any queries you may have.

Should you need any help please contact your ALPHERA Financial Services Regional Manager or send us your query via the system by clicking on the Help button found on the eMaster™ Menu screen.

CONTENTS

HOW TO LOG IN

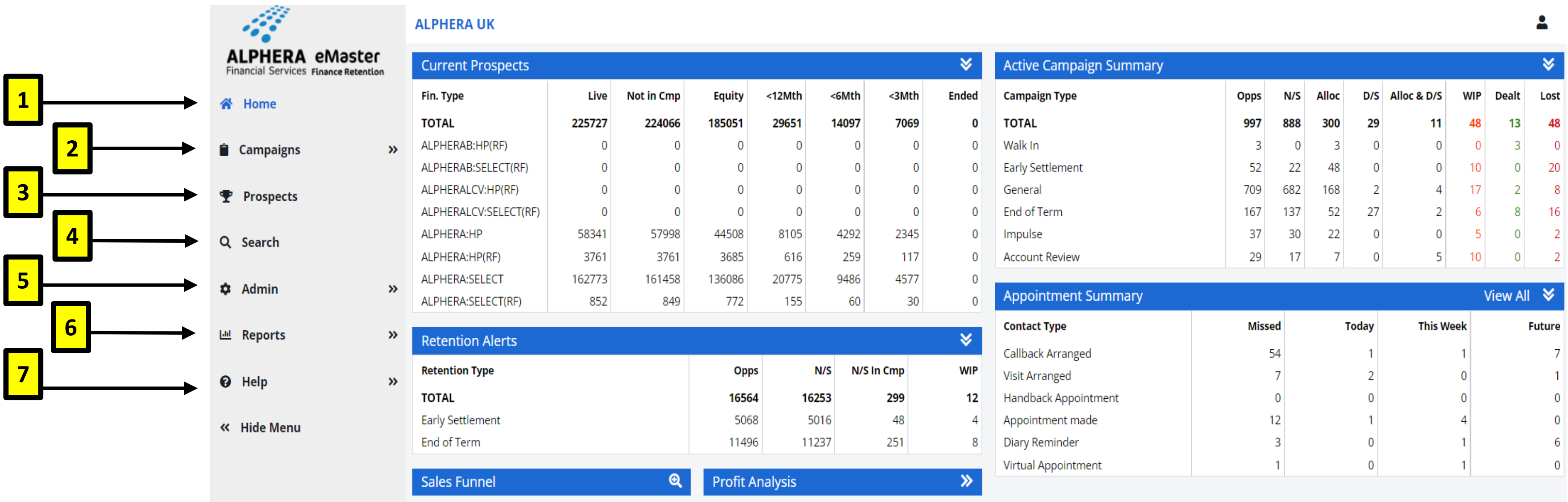


How to log in

Go to the website address that you have been given e.g., https://alpherauk.emasterglobal.com/
The home screen now appears.
Enter your **Username** (usually your email address) and **Password** that you have been provided with and click the **Login** button.
Language selection is available when opening the dropdown selection list.

If you forget your password, simply enter your **Username** and click the **forgotten password** link.

You will also be able to access our Sandbox environment to use the tool in a testing environment, without changing any live data.
To access Sandbox, go to https://sandbox-alpherauk.emasterglobal.com/ and enter in your normal login credentials.



MANAGERS DASHBOARD

eMaster™ Menu commands will direct the user to all necessary activity

1 **Home – Dashboard:** Main Menu of eMaster

2 **Campaigns:** Creating your Campaigns

3 **Prospects:** Here you will find your Customer list

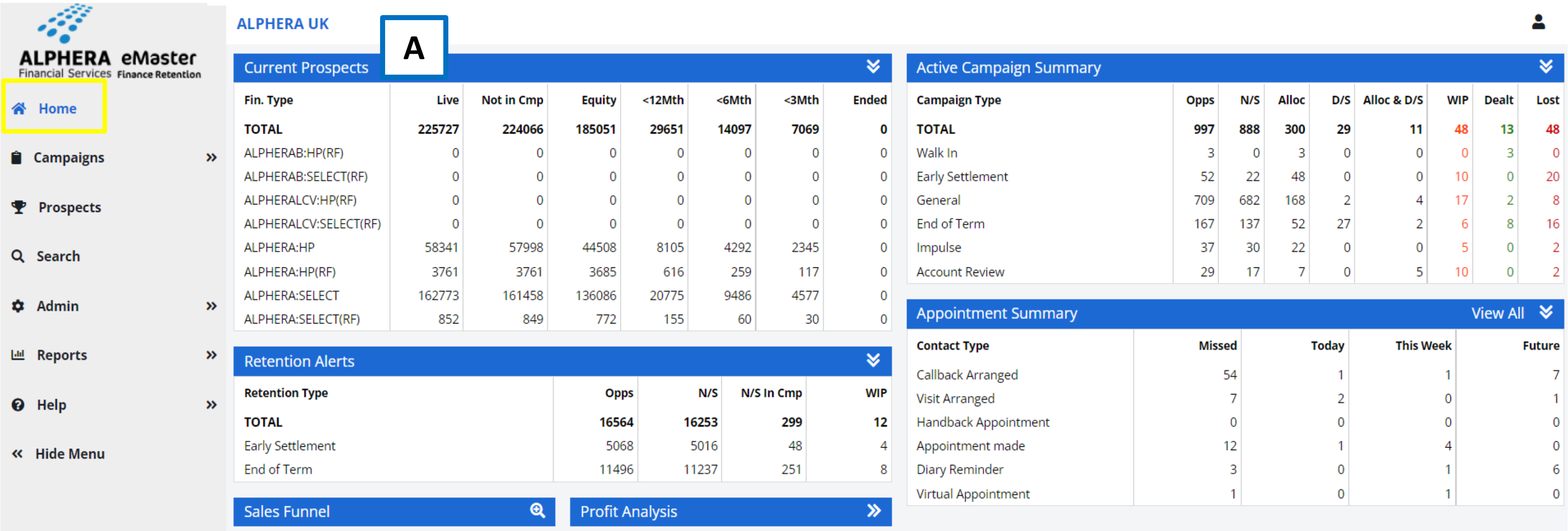
4 **Search:** Customer Search by Name or Registration Number

5 **Admin:** Helpful tools to optimize your work

6 **Reports:** Check your Activities

7 **Help:** Support, Training, News

MANAGERS DASHBOARD - HOME



Fin. Type	Live	Not in Cmp	Equity	<12Mth	<6Mth	<3Mth	Ended
TOTAL	**225727**	**224066**	**185051**	**29651**	**14097**	**7069**	**0**
ALPHERAB:HP(RF)	0	0	0	0	0	0	0
ALPHERAB:SELECT(RF)	0	0	0	0	0	0	0
ALPHERALCV:HP(RF)	0	0	0	0	0	0	0
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Retention Type	Opps	N/S	N/S In Cmp	WIP
TOTAL	**16564**	**16253**	**299**	**12**
Early Settlement	5068	5016	48	4
End of Term	11496	11237	251	8

Campaign Type	Opps	N/S	Alloc	D/S	Alloc & D/S	WIP	Dealt	Lost
TOTAL	**997**	**888**	**300**	**29**	**11**	**48**	**13**	**48**
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Early Settlement	52	22	48	0	0	10	0	20
General	709	682	168	2	4	17	2	8
End of Term	167	137	52	27	2	6	8	16
Impulse	37	30	22	0	0	5	0	2
Account Review	29	17	7	0	5	10	0	2

Contact Type	Missed	Today	This Week	Future
Callback Arranged	54	1	1	7
Visit Arranged	7	2	0	1
Handback Appointment	0	0	0	0
Appointment made	12	1	4	0
Diary Reminder	3	0	1	6
Virtual Appointment	1	0	1	0

A. CURRENT PROSPECTS

This displays a list of all of your current live ALPHERA Finance customers.

The finance agreement types are further split as follows on the top line horizontally:

- **Total Live Finance Cases**
- **Not in Campaign**
- **In Equity**
- **Less than 12 months to go**
- **Less than 6 months to go**
- **Less than 3 months to go**
- **Ended**

Click on any of the fields to create a campaign with those prospects pre-filtered.

MANAGERS DASHBOARD - HOME

ALPHERA Financial Services eMaster Finance Retention

- Home
- Campaigns »
- Prospects
- Search
- Admin »
- Reports »
- Help »
- « Hide Menu

Current Prospects

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Retention Alerts

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Sales Funnel

Profit Analysis

Active Campaign B

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Appointment Summary View All

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Helpful Tip

Click on any of the fields to create a campaign with those prospects pre-filtered.

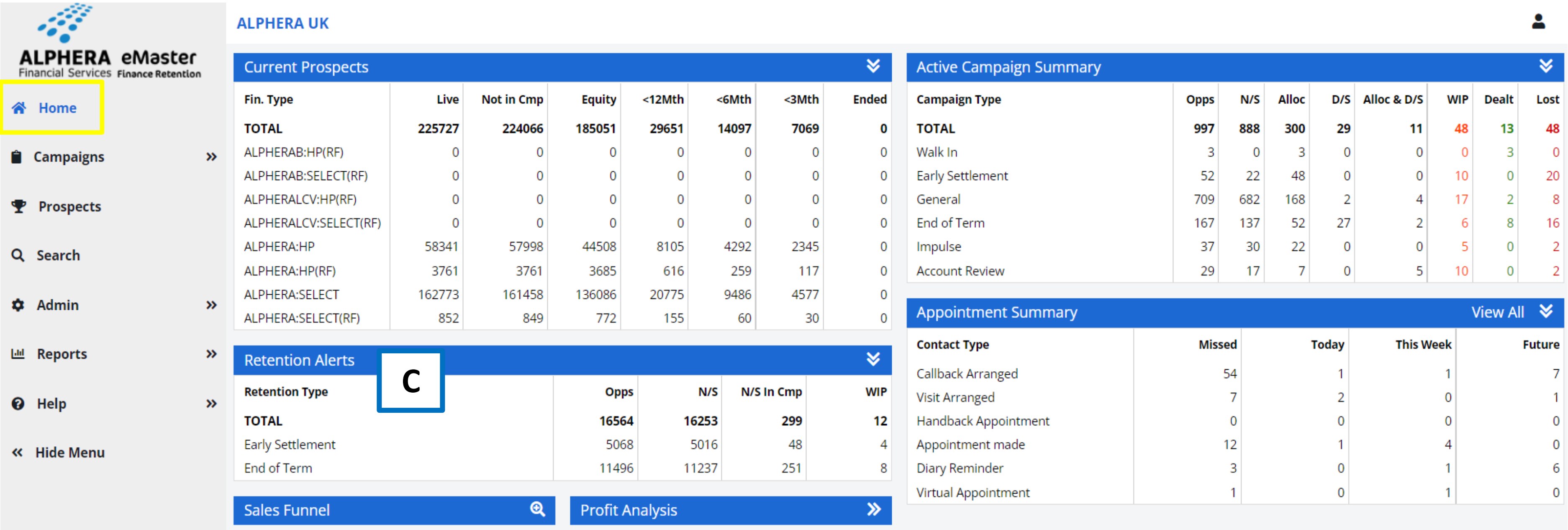
B. ACTIVE CAMPAIGN SUMMARY

This displays a summary of all current Active Campaigns and displays:

- **Leads: Total Opportunities split horizontally by Campaign Type**
- **Opportunities split further in columns for Non-Solicited/Not Started (N/S)**
- **Alloc: Number of opportunities allocated**
- **D/S: Number of opportunities with a 'Deal Stacked'.**
- **Alloc & D/S: Number of opportunities allocated and with a deal stacked.**
- **WIP: Work In Progress**
- **Dealt – Number of sales made**
- **Lost – Contacted and closed**

Note: The word 'campaign' does not mean that a customer received an email campaign, but rather the word 'campaign' should be linked to a finance offer being created. The offer would have been created either by ALPHERA Financial Services, or internally within the retailer.

MANAGERS DASHBOARD - HOME



ALPHERA eMaster
Financial Services Finance Retention

- Home
- Campaigns »
- Prospects
- Search
- Admin »
- Reports »
- Help »
- « Hide Menu

ALPHERA UK

Current Prospects

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Retention Alerts C

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Sales Funnel

Profit Analysis »

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Click on any of the fields to create a campaign with those prospects pre-filtered.

Helpful Tip

C. RETENTION ALERTS

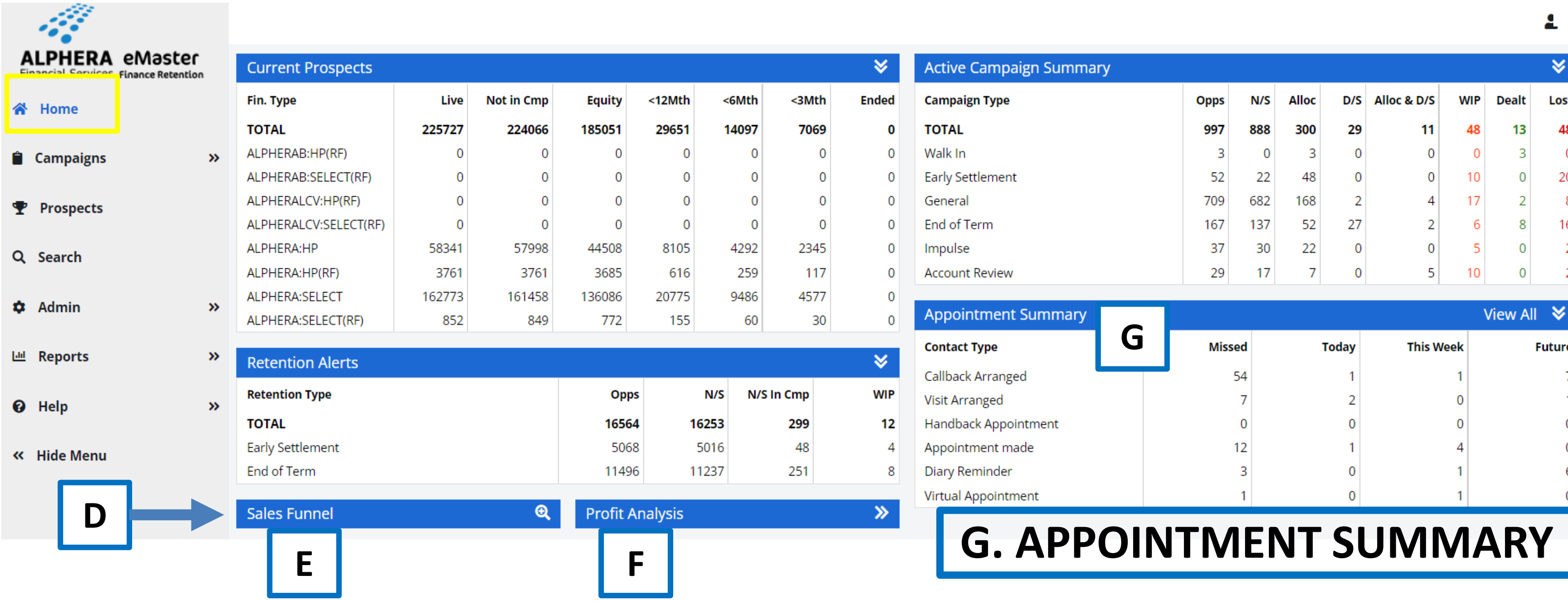
This section shows your EARLY SETTLEMENTS, END OF TERM and NATIONALLY created CAMPAIGNS.

End of Term (EOT) – When a customer has less than 6 month's to go on the existing finance, they will automatically drop in to the **RETENTION ALERT** box. If the retailer has not recorded that contact has been made with an EOT customer, within three months, the prospect will automatically be passed back to the RST/Safetynet.

Early Settlement – These requests will be sent by ALPHERA Finance to eMaster™ every hour. The opportunities are triggered as and when a customer requests a settlement by contacting ALPHERA Finance telephonically, or via the MyAccount self service portal.

National Campaigns - This will detail prospects who have been selected in a Nationally created campaign from ALPHERA Finance.

MANAGERS DASHBOARD - HOME



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Retention Alerts

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G. APPOINTMENT SUMMARY

This shows the real time status of appointments made and their current status.

Note: ***The performance relies on the capturing of information in the tool, for example, if a customer that was worked on is not closed by the retailer as 'SALE' the results will be inaccurate.***

D. KEY PERFOMANCE INDICATORS

The Key Performance Indicators can be filtered to show performance of all campaigns, or by filtering this section by using the arrow alongside **All Time**, choose a specific time frame to see campaign performance.

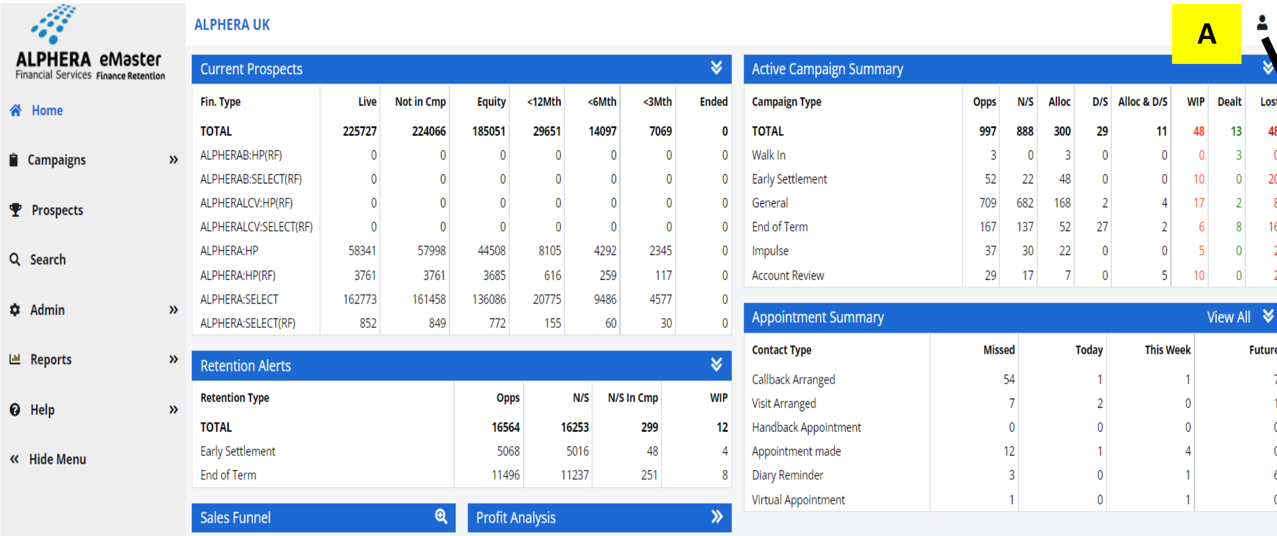
E. SALES FUNNEL

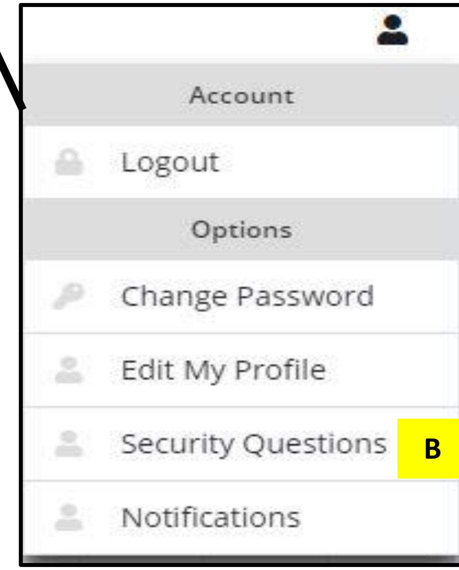
The sales funnel gives a snapshot of the performance from the set KPI. Use the magnifying glass, which when clicked, will give more deal related statistics.

F. PROFIT ANALYSIS

The profit analysis shows the performance relating to the KPI criteria selected, from Profit per Opportunity to Total Profit. The information is based on the profit entered into the tool by the user when updating the customer T-Card as 'SALE'.

OPTIONS





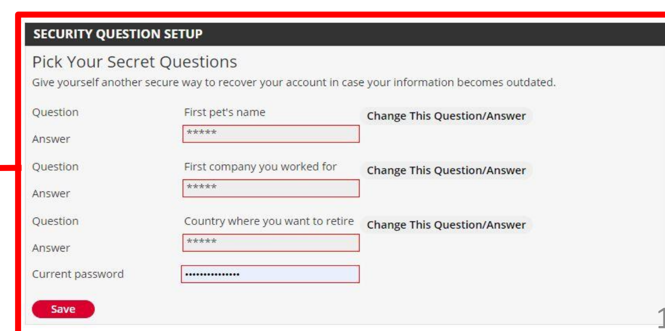
A. Clicking on the **USERNAME** in the top right hand side of the screen allows the user to change their password, profile or select which notification alerts they wish to receive by email.

To change the password click **Change Password**. Enter the existing password followed by the new one and click the **Save** button.

Edit My Profile allows the user to change their name, email address, job position, and depending upon user privileges, allows the user to change their **Hierarchy Level.**

Once the changes have been made, click the **Save** button.

B. It is recommended to add **Security Questions** to your account – this will save time if a password has been forgotten.



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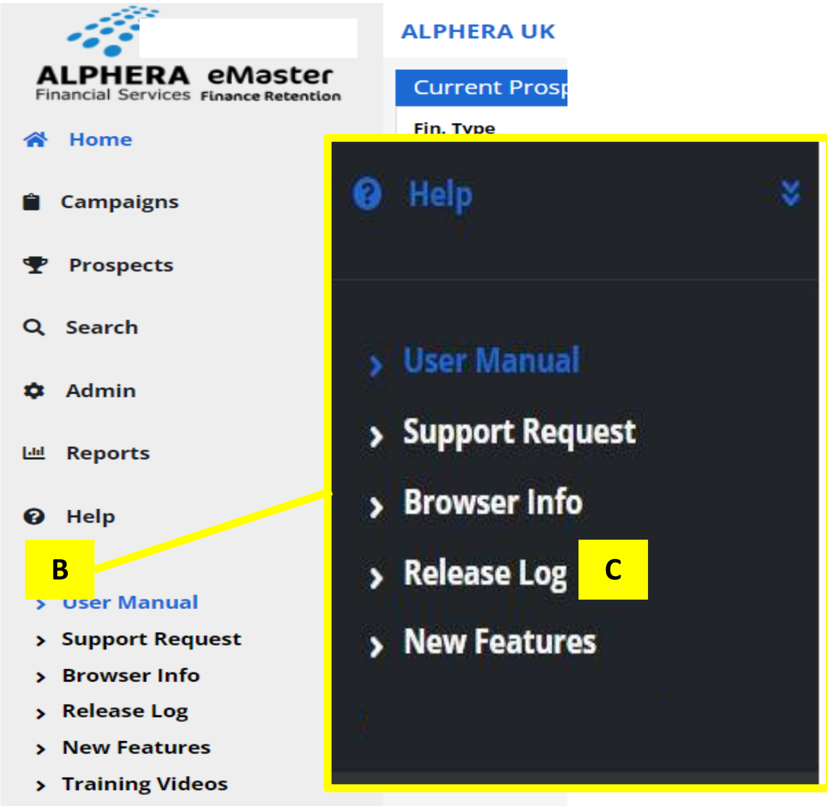


B. Under the help section in the menu bar you will find various other useful information such as:

Support Request if you need assistance with the system or a fault.

Browser Info you may be asked this by one of our support team if you have an issue.

Release Log will give details of the dates of new releases and bug fixes.

New Features is exactly what it says, if any new features are launched they will be published here.

C. RELEASE LOG

Here you can find a series of **Release dates for bug fixes and new features**

Release Log

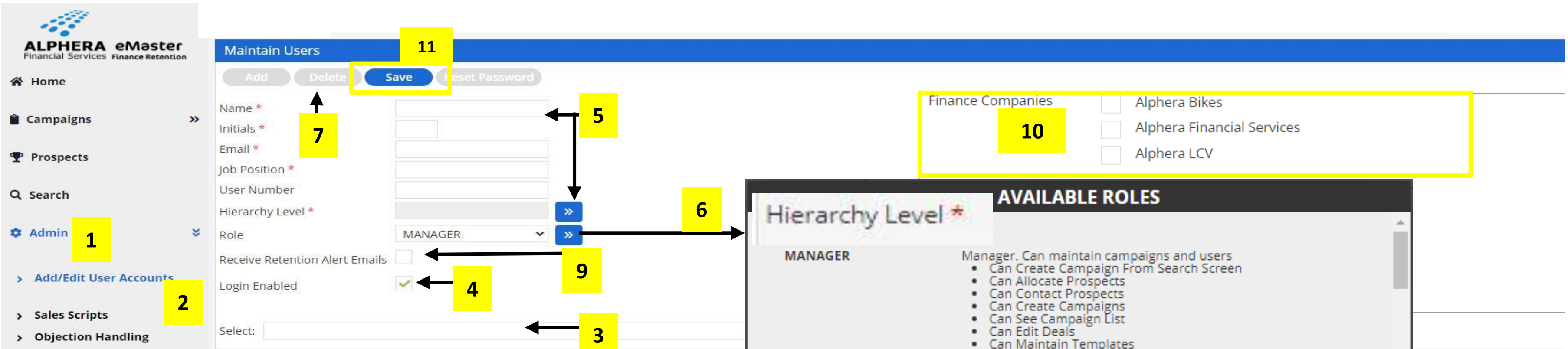
Release Date: 03/12/2021 Version: 3.41.47
Minor Bug fixes
New Feature - Add user email verification requirement to reduce failed email deliveries

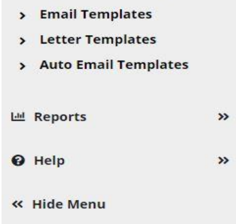
Release Date: 05/11/2021 Version: 3.21.43
Minor Bug fixes
New Feature - Display in T-Card which elements of a deal a customer has changed in eMasterPortal
New Feature - Link Reports Campaign Filter to Selected Hierarchy Level for easier filtering

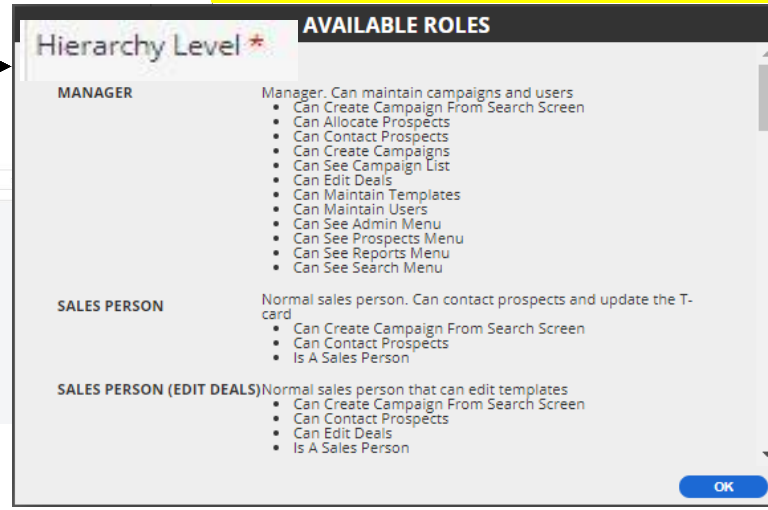
Release Date: 22/10/2021 Version: 3.21.41
Minor Bug fixes
Bug Fix - Keywords filter restricted to 250 characters
New Feature - Add Campaign status Column to Search screen results list
New Feature - Allow filter by city on Campaign Creation
New Feature - Add user email email and SMS placeholder
New Feature - Show deal from previous agreement for refinanced agreements

Release Date: 08/10/2021 Version: 3.21.39
Minor Bug fixes
New Feature - Added status filter to bulk message recipients
New Feature - Upgraded eMaster reporting module with new filters and layout

ADMIN – EDIT/ADD USER







Enables the user to perform a number of administration functions depending upon their user privileges (Access level set up).

1. Go to the Admin button on the menu bar.
2. Click on 'Add/Edit User Accounts' – A user is able to add or remove users.
3. Before adding a user, first check to see if the user is not already registered on eMaster. To confirm this, click on the 'Select' drop down list and search for the user name.
4. To reactive a user who is already loaded on the system, click alongside the 'Login Enabled' button so that the button turns green. *Users are automatically deactivated if their profile is inactive for more than 90 days.*
5. To add a new user, complete the Name, Initials, Email, Job Position and ID number. Click on the button next to the **Hierarchy Level** field and select the retailer/brand.
6. Select the users role from the **Role** dropdown list (clicking on the blue arrowed button alongside role will allow the user to view the various roles and the access level associated with each role).
7. To **Delete** a user, select the user from the bottom **Select** dropdown list. Once user name appears, click on the **Delete** button at the top of the screen.
8. Any changes to the user profile can also be done by selecting a user and making the required changes. After making the changes, click on the Save button.
9. A user can also be set up to receive emails notifying the user when a retention alert (Early Settlement opportunity) is received. Click on **Receive Retention Alert Emails.** Tick the box.
10. To complete the set up process, select the **Finance Companies** (brand) in top right side, as this determines what brand opportunities the user will have access to work on.
11. Once all updates are complete click the Save button

INTERNET BROWSERS

In order to run eMaster™, user must ensure they have **Internet Explorer 9 or above** (not running in 'Compatibility Mode') or an alternative modern browser (such as **Firefox** or **Google Chrome**).

Helpful Tip

eMaster™ uses modern technology to provide the optimum user experience. As such, it is not compatible with older web browsers, such as Internet Explorer 7 or earlier.

How to check your version of Internet Explorer:
Option 1
Visit www.whatismybrowser.com

Or Option 2

Open Internet Explorer as normal. From the menu bar at the top of the browser window, click 'Help' then choose 'About Internet Explorer' from the drop-down menu. A dialog box will appear similar to the example picture.

This example shows Internet Explorer 9.

What should I do if I am using Internet Explorer 8 or below?

You need to update to a newer version of Internet Explorer, or install an alternative browser such as Firefox or Google Chrome, as follows:

1. To update the version of Internet Explorer to the latest version for the computer (IE8 is the newest version available to Windows XP users – Windows Vista or Windows 7 users can upgrade to IE9), please use **Windows Update** or visit http://www.microsoft.com/ie

2. Alternatively (or for users using older versions of Windows, such Windows XP), download Firefox or Google Chrome:
   - Firefox: http://www.getfirefox.com
   - Google Chrome: http://www.google.com/chrome

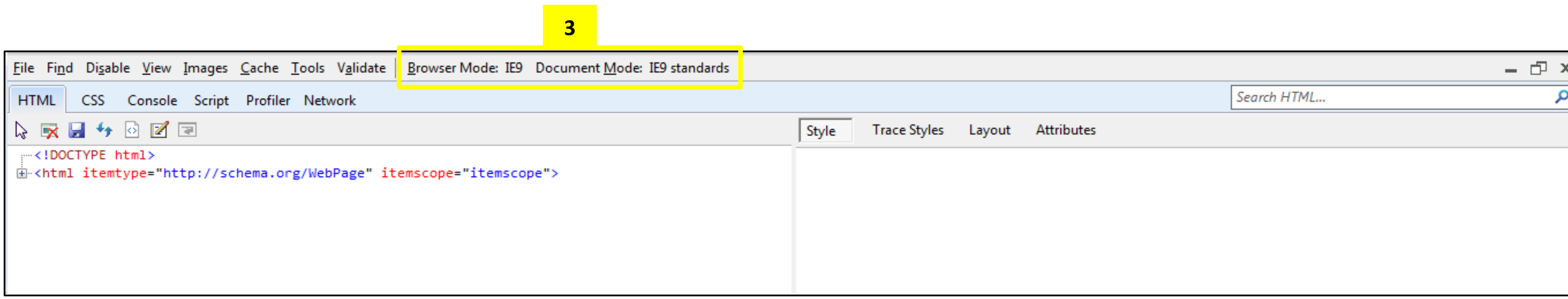
Note: Windows XP is no longer supported by Microsoft, therefore may pose a security risk. We would highly recommend that all users of Windows XP consider upgrading their operating system.

I am running Internet Explorer 9 or above, but am still having difficulties using eMaster™

It is possible that the Internet Explorer is running in compatibility view. To make sure this is turned off, follow the below instructions:

1. Open Internet Explorer as normal.

2. On your keyboard, press the F12 key to open Developer View. Your Internet Explorer window will open a panel at the bottom, similar to the one pictured below:



3. To the right of the menu, make sure that both ‘Browser Mode’ and ‘Document Mode’ are set to the sub vented same as your browser version as shown in the example. If they are not set up, click on each and choose the correct settings.

4. Press F12 on your keyboard to close Developer Tools.

5. Log into eMaster™ - everything should work OK now.   If you are still having difficulties, contact FISC at support@fisconline.co.uk