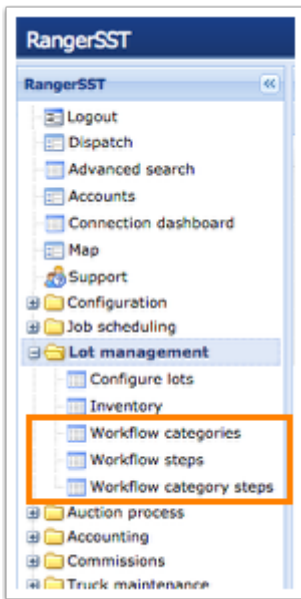


Using Storage Workflow

Ranger now allows customers to define and configure workflow processes within Lot Management. In this example, we will create a lien letter mailing process based on the value of a vehicle, define the specific actions for this workflow, and set up the timing for completing each step with visually displayed reminders on the Lot Inventory screen.

Notice additional menus items within the Lot management folder from the Main Menu.

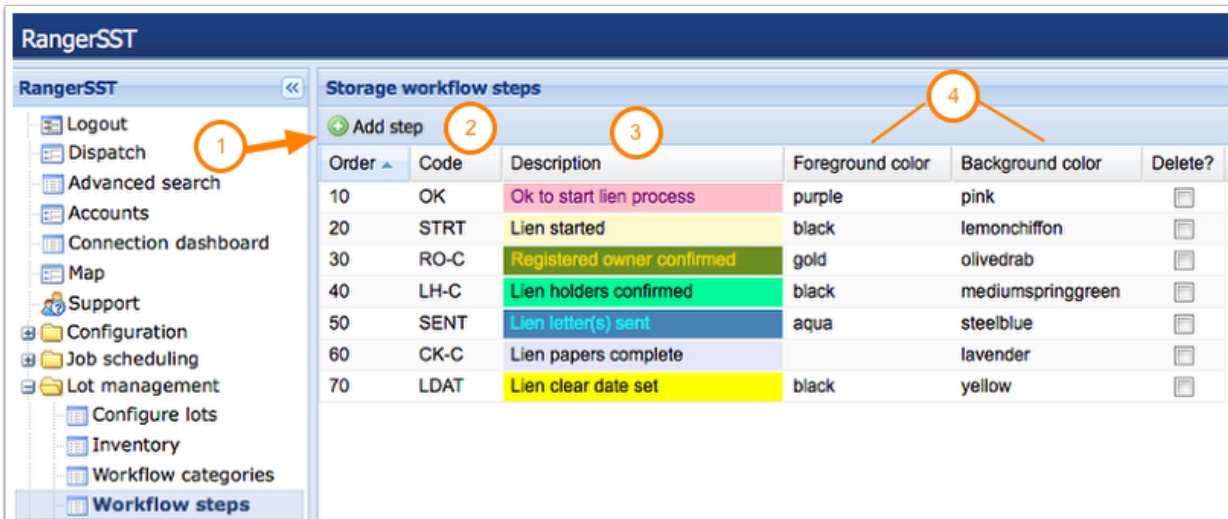


1. First, create the workflow categories for the lien process based on the value of the vehicle.

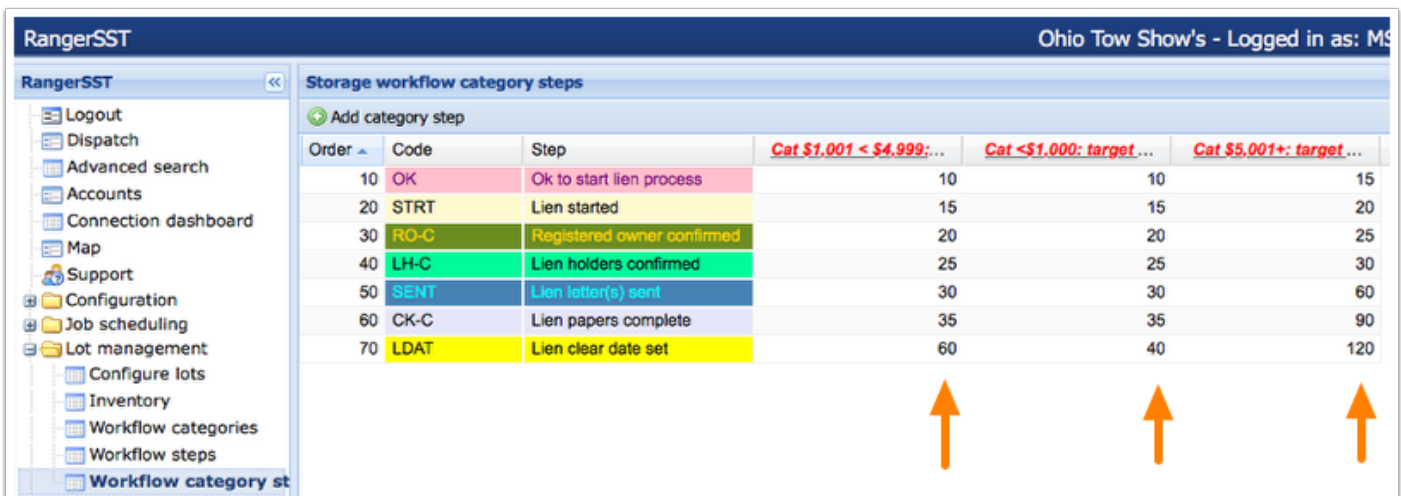
Code	Description	Storage charges days limit	Holds auto-released after days	Delete?
\$5,001+	Vehicles greater than \$5,001	120	120	<input type="checkbox"/>
<\$1,000	Vehicles < \$1,000 in value	15	120	<input type="checkbox"/>
\$1,001 < \$4,999	Vehicles \$1,001 < \$5,000 in value	30	120	<input type="checkbox"/>

Set up as many vehicle categories, storage charge limits, or holds released limits as mandated by your state, if applicable

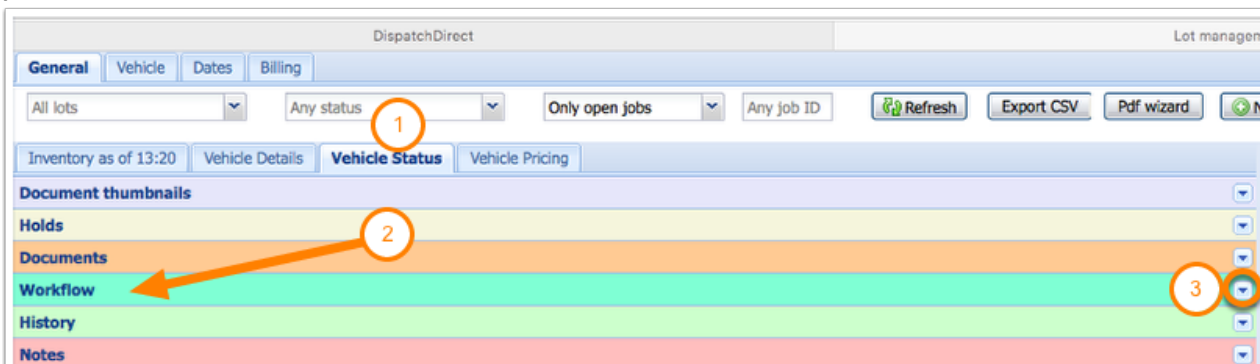
2. Create the workflow steps for your team to follow by creating a 4-character code and description of the step. If desired, configure the colors for each step, which will be displayed on the Lot inventory screen.



3. From the Workflow category steps menu, define the cumulative number of days at which to set the target date for each step. This will cause the Lot management screen to display the days-remaining countdown to the next status, the actual status, and the plan (target) status.



4. Note there is a new "Workflow" panel available in vehicle status. Click the triangle to open the panel.



5. Let's choose a vehicle from the lot and assign a workflow. Click on a vehicle and then on the vehicle status tab. Open Workflow and use the current category dropdown menu to choose appropriate \$ value from the predefined options, and click on Save selected.

The screenshot shows the DispatchDirect interface with the 'Vehicle Status' tab selected. The 'Workflow' section is active, and a dropdown menu is open for 'Current category'. The dropdown options are:

- None selected
- Test category with low limits
- Vehicles \$1,001 < \$5,000 in value
- Vehicles < \$1,000 in value
- Vehicles greater than \$5,001

The 'Save selected category' button is highlighted with a red circle (1). An orange arrow points to the dropdown menu.

6. You will see the target dates listed for each step in the process based on the vehicle value and the workflow process steps.

The screenshot shows the DispatchDirect interface with the 'Vehicle Status' tab selected. The 'Workflow' section is active, and the 'Current category' is set to 'Vehicles \$1,001 < \$5,000 in value'. The table below shows the target dates for each step in the process:

Order	Code	Target date	Completed date	Completed by
8	PENDING	07/15/2016		
9	ADMIT	07/15/2016		
10	OK	07/25/2016		
20	STRT	07/30/2016		
30	RO-C	08/04/2016		
40	LH-C	08/09/2016		
50	SENT	08/14/2016		
60	CK-C	08/19/2016		
70	LDAT	09/13/2016		

7. Click in the Completed date column next to the desired step and enter/choose a date to record. We have located and added the Lienholder as an interested party, so we will also record that date.

Order	Code	Target date	Completed date	Completed by
8	PENDING	07/15/2016		
9	ADMIT	07/15/2016		
10	OK	07/25/2016	07/25/2016	
20	STRT	07/30/2016	07/29/2016	
30	RO-C	08/04/2016	08/04/2016	
40	LH-C	08/09/2016	08-04-2016	
50	SENT	08/14/2016		
60	CK-C	08/19/2016		
70	LDAT	09/13/2016		

8. From the Lot inventory screen for this job, you see that our Actual status is LH-C as we've confirmed the lienholder. Our planned next status is to record the date we SENT the lien letter, which is due in 9 days (highlighted in yellow as it is getting closer). Within 5 days Next due changes to Red.

Started	Days	Next due	Actual sta...	Plan status
2016-07-15 14:28	20.9	9	LH-C	SENT

We will soon elevate changes in the default column order on the Lot inventory screen. The columns will, by default, be presented in a more logical order, so when this is elevated, your Lot management screen will look different. You can still move the columns to your preferred order. **Remember that frequently clearing your browser history, as recommended for better browser performance, will reset columns back to the new default.**