

Up Log Training Manual

Focused guide to customer-opportunity entry, visit-by-visit activity, salesperson rotation, customer status, and management use.

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TICK	SUMMARY	ACTIVITY	HOG	UP LOG	TRADE %	POT OF GOLD	LEADERBOARD	SETTINGS	USED CARS				Troy Duce
Up Log To Bottom Who's Up Up Log Stats EDMED Stats Turn Timer: 30 min 09/13/2026													
FRESH UPS 7 APPOINTMENTS 2 WRITE UPS 3													
--	SALESPERSON:	STATUS:	TURNED TO:	CUSTOMER:	NOTES:								
	Daniel Butsick	Appointment	--	MIKHAIL BOBKO	FB MARKETPLACE 25 G70								
9:00 AM	SALESPERSON:	STATUS:	TURNED TO:	CUSTOMER:	NOTES:								
	Jeremy Delaney	Timed Out	--	--	--								
9:30 AM	SALESPERSON:	STATUS:	TURNED TO:	CUSTOMER:	NOTES:								
	Bryan DeAnda	Timed Out	--	--	--								
10:00 AM	SALESPERSON:	STATUS:	TURNED TO:	CUSTOMER:	NOTES:								
	Kyrus Condon	Timed Out	--	--	--								
10:31 AM	SALESPERSON:	STATUS:	TURNED TO:	CUSTOMER:	NOTES:								
	Sam Wagner	Fresh Up	--	mike kaiser	getting info for wife thinking of bringing her in tomorrow								
10:43 AM	SALESPERSON:	STATUS:	TURNED TO:	CUSTOMER:	NOTES:								
	Jeremy Delaney	Timed Out	--	--	--								
11:13 AM	SALESPERSON:	STATUS:	TURNED TO:	CUSTOMER:	NOTES:								
	Bryan DeAnda	Fresh Up	--	Joanna NO LAST	Hated new Outback. Wouldnt consider anynpreowned								
11:16 AM	SALESPERSON:	STATUS:	TURNED TO:	CUSTOMER:	NOTES:								
	Kyrus Condon	Timed Out	--	--	--								
--	SALESPERSON:	STATUS:	TURNED TO:	CUSTOMER:	NOTES:								

1 What the Up Log Does

The Up Log can manage the salesperson rotation/order used by the dealership and records customer-facing activity throughout the day. Its reports are only as accurate as the individual visit records.

	FRESH UPS	APPOINTMENTS	WRITE UPS
	7	2	3

	SALESPERSON:	STATUS:	TURNED TO:	CUSTOMER:	NOTES:
--	Daniel Butsick	Appointment	--	MIKHAIL BOBKO	FB MARKETPLACE 25 G70
9:00 AM	Jeremy Delaney	Timed Out	--	--	--
9:30 AM	Bryan DeAnda	Timed Out	--	--	--
10:00 AM	Kyrus Condon	Timed Out	--	--	--
10:31 AM	Sam Wagner	Fresh Up	--	mike kaiser	getting info for wife thinking of bringing her in tomorrow
10:43 AM	Jeremy Delaney	Timed Out	--	--	--
11:13 AM	Bryan DeAnda	Fresh Up	--	Joanna NO LAST	Hated new Outback. Wouldnt consider anynpreowned
11:16 AM	Kyrus Condon	Timed Out	--	--	--
--	--	--	--	--	--

Up Log page example. Customer and employee data are obscured.

2 Fresh Up

Fresh means the customer's first in-person opportunity at the retailer for that particular deal. The customer can still be Fresh if they leave before contact. Fresh does not mean PG occurred.

3 PG - Power Greeting

PG means contact was made with the customer. It does not mean a product presentation occurred. If the customer enters the lot and leaves before anyone can say hello, PG should not be checked. If a dealership representative makes contact, even briefly, PG occurred.

4 Appointments

Appointment means the customer arrived because an appointment had been established. Mark an appointment Fresh only if it is actually the customer's first in-person visit for that deal.

If great follow-up gets a customer who has already visited back into the store, record the return as an Appointment only - not Fresh.

5 Fresh Appointment + Self-Generated

In most situations where an Appointment is also Fresh, the salesperson generated the first visit through a repeat customer, referral, social media, personal marketing, networking, or another configured source. Record Appointment + Fresh + Self-Generated + Source when all are true.

6 BDC First Visit

If the BDC schedules the customer's first visit and a salesperson receives the customer because it is their turn, record Fresh Up with the BDC box checked. Do not call the appointment salesperson self-generated.

The screenshot displays the Up Log entry form with the following fields and values:

- TIME:** --:-- --
- ALT:** Default
- SALESPERSON:** [Empty dropdown]
- STATUS:** Appointment
- TURNED TO:** None
- MANAGER:** None
- CUSTOMER:** TEST CUSTOMER
- PG:** ☒
- BDC UP:** ☐
- TEST DRIVE:** ☒
- WRITE UP:** ☐
- IN DRIVE?:** ☐
- APPRAISAL:** ☒
- SOLD:** No
- NOTES:** Add notes
- CUSTOMER STATUS:** None
- FRESH:** ☒
- SELF-GEN:** ☒
- SOURCE:** Referral

A dropdown menu for Customer Status is open, showing the following options:

- ☒ None
- ☐ Working
- ☐ Appointment Set
- ☐ Appointment Shown
- ☐ Sold
- ☐ Bought Elsewhere
- ☐ No Longer Shopping

Example Up Log entry controls. Dealership options may vary.

7 Record Activity on the Visit Where It Happened

Do not carry activity forward or backward between visits. Visit 1 might be Fresh + PG + Test Drive. If the customer returns later, does not test drive again, but is written up and sold, Visit 2 should show Write Up + Sold only.

8 Working & Bought Elsewhere

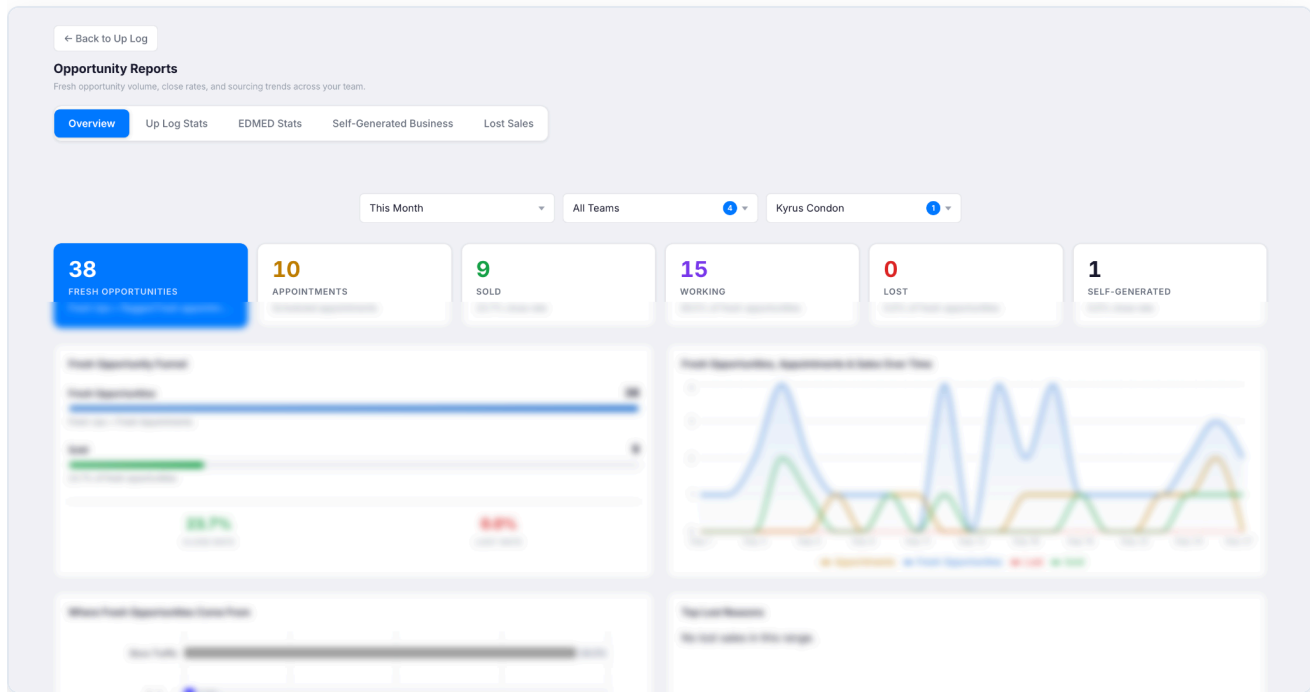
Working is for legitimate hot opportunities still being actively and consistently followed in the CRM. Bought Elsewhere is used when the customer tells the dealership they purchased elsewhere. Lost Reason, Reason Source, and Purchased From can be recorded when known. Do not guess.

The screenshot displays the DealSync CRM interface for a customer record. The top section includes fields for TIME, ALT, SALESPERSON, STATUS (Appointment), TURNED TO (None), and MANAGER (None). Below this is the CUSTOMER section with a text field for the customer name (TEST CUSTOMER) and checkboxes for PG, BDC UP, TEST DRIVE, WRITE UP, IN DRIVE?, APPRAISAL, and SOLD. A NOTES section with a text area is also present. The bottom section contains CUSTOMER STATUS (Bought Elsewhere), LOST REASON (a dropdown menu with options: Select..., Price / Competitor Offer, Warranty Offers, Vehicle Not Available, Trade Value, Payment, Credit / Financing, and Bought Different Brand), REASON SOURCE (a dropdown menu with Select...), PURCHASED FROM (a text field with Which dealer?), FRESH (checked), SELF-GEN (checked), and SOURCE (Referral). A + Add Row button is located on the left, and a To Top button is on the right.

Customer status and lost-sale controls example.

9 Opportunity Reports

Opportunity Reports can be filtered by time, team, and salesperson. Interactive metric boxes can open the individual opportunities included in the number, allowing management to move from a metric to the customers behind it.



Opportunity Reports example. Customer-level data are obscured.

10 Daily Sales Manager Use

Sales Managers should review each salesperson's activity daily to identify where they can add value to the salesperson or a current customer opportunity. The review should look for missed contact, process gaps, legitimate Working opportunities, appointments/returns that may need manager involvement, lost opportunities, and self-generated activity.

The purpose is to help today - not simply audit the salesperson after the outcome is already decided.

11 Quick Definitions

Fresh

First in-person visit for this particular deal.

Appointment

Customer arrived because an appointment was established.

Self-Generated

Salesperson created the opportunity; identify source.

TD

Test Drive on this visit.

TA

Trade Appraisal on this visit.

PG

Customer contact occurred.

BDC

BDC attribution; can coexist with Fresh.

Working

Hot opportunity actively followed in CRM.

WU

Write Up on this visit.

Sold

Sold result on this visit.

