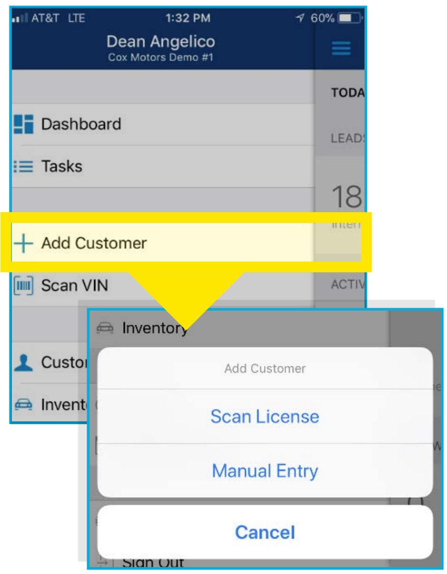
# Connect Mobile

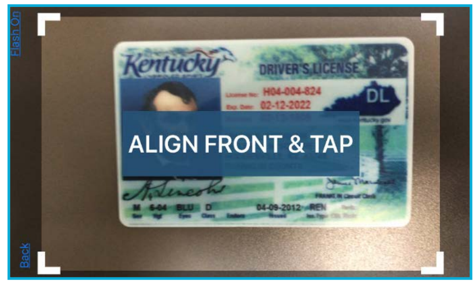
## Connect CRM Dashboard: Adding a Customer

Select *Add Customer* from the main menu dashboard then choose *Scan License* or *Manual Entry*.




## 1. Scan License

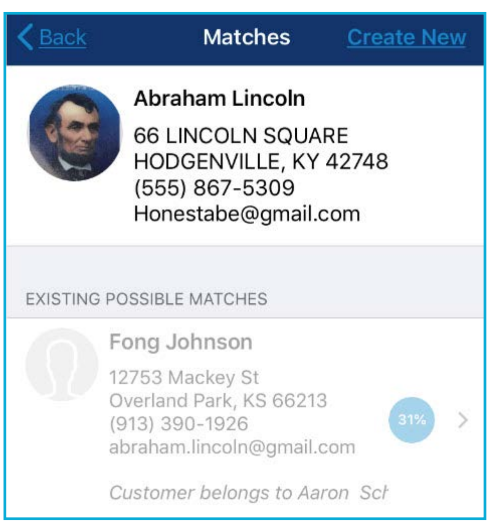
To scan the front of the drivers license, tap on the screen to capture the image and then select *Use Image* to continue. Repeat the same process for the back.





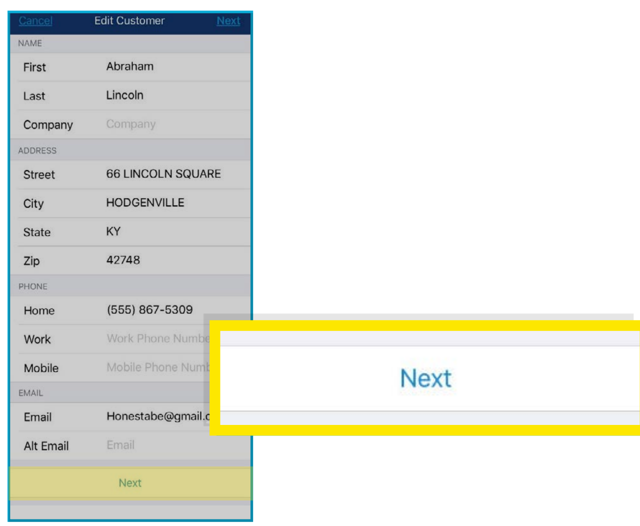
## 2. Confirming or Adding to the Customers Information

To create a new customer if the customer is not a match, click *Create New*. If the customer is already in the system, click on the profile below.




## 3. Editing the customer's information:

After selecting the customer or *Create New*, the edit screen will open. From this screen, update the customers information as needed and add any additional phone numbers and email addresses. Once complete, click *Next* to continue.

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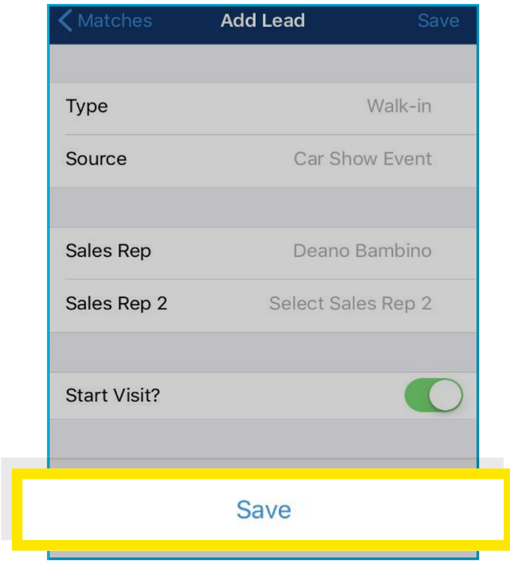
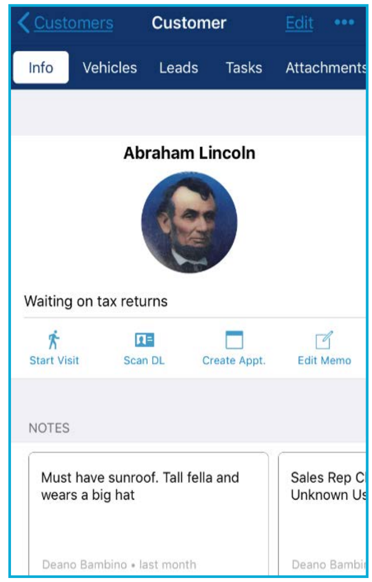
## 4. Lead Type & Lead Sourcing

After clicking *Next*, the *Add Lead* screen will appear. Enter the lead type, lead source, and hit *Save*.



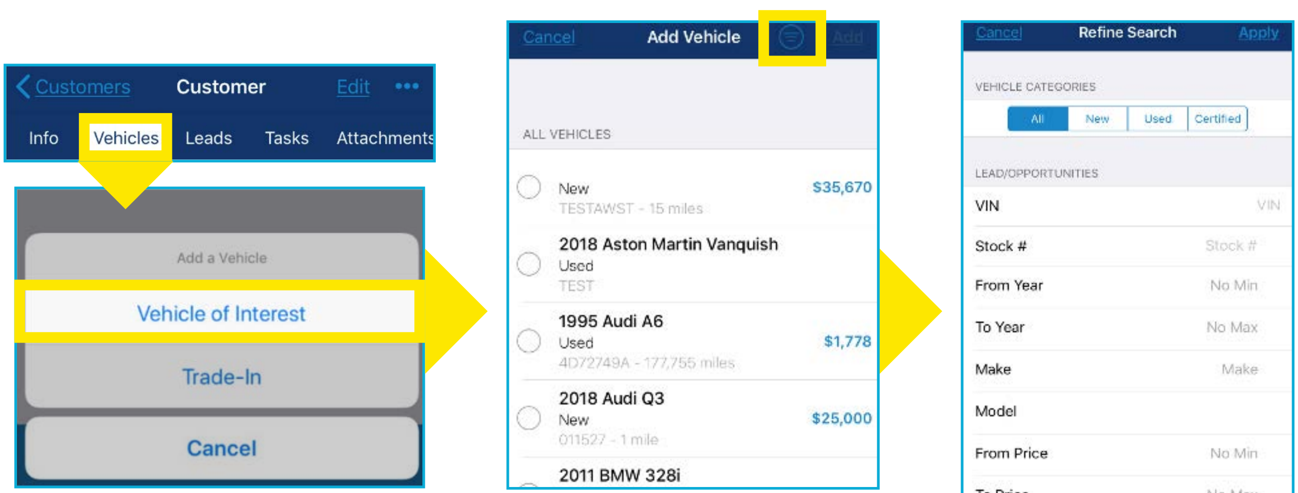

## 5. Customer Dashboard

The customer dashboard houses all the customer information similar to the desktop customer dashboard. From here appointments can be set, notes and the co-signer can be added, and activites can be performed.




## 6. Adding a Vehicle

There are two ways to add a vehicle of interest. Select from the inventory or by scanning the VIN.
To add a vehicle to the customer dashboard, click *Add Vehicle* at the bottom, select the vehicle of interest, select the vehicle from inventory, and click *Add*.




* Click here to use filters or search

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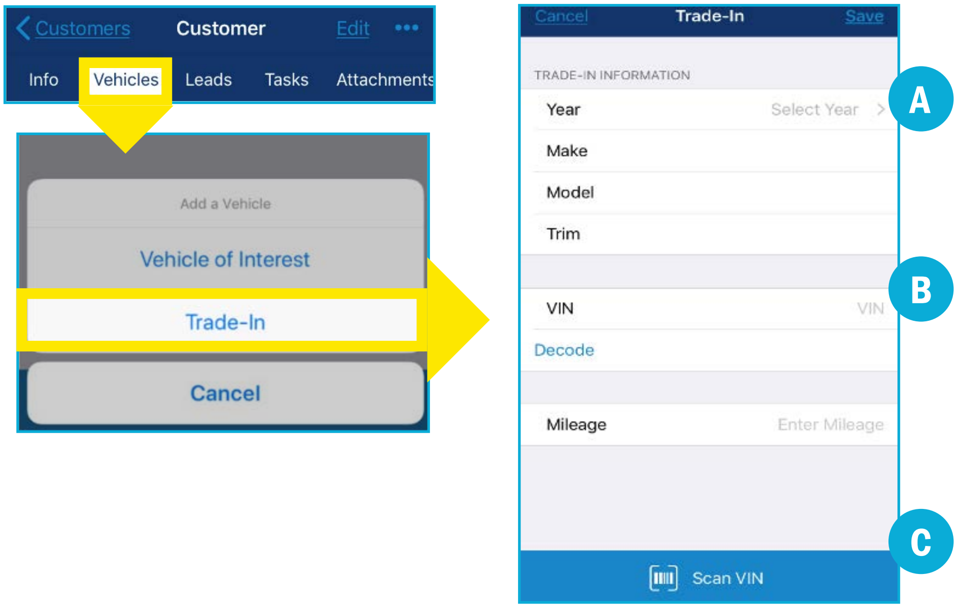
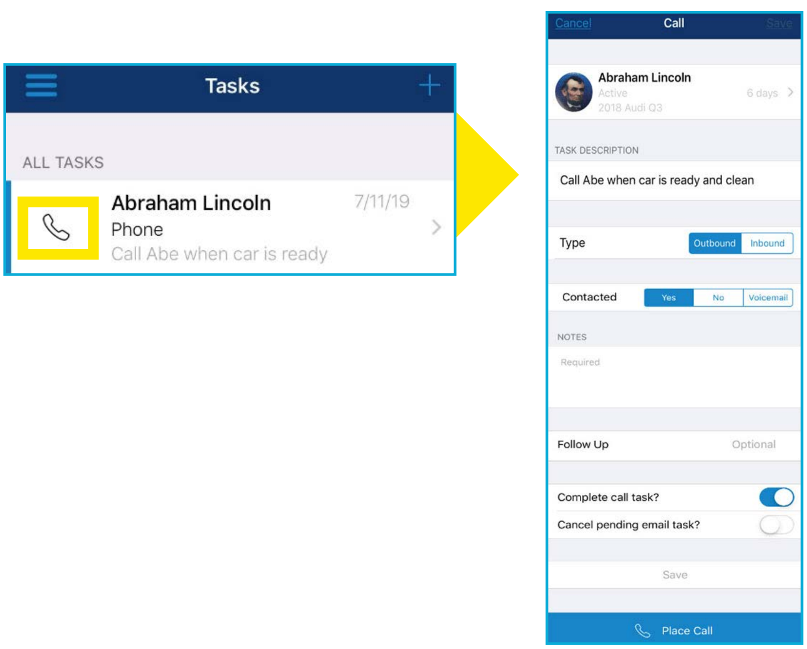
## 7. Adding a Trade

To add a trade in, click *Add Vehicle* at the bottom, select *Trade-In*, click the *Trade-In* tab. There are 3 different options for adding a trade: a) manually enter the information, b) inputting the Vin and click decode, or c) scan the Vin.

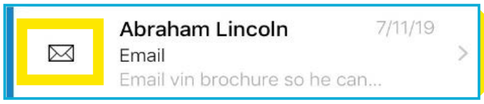


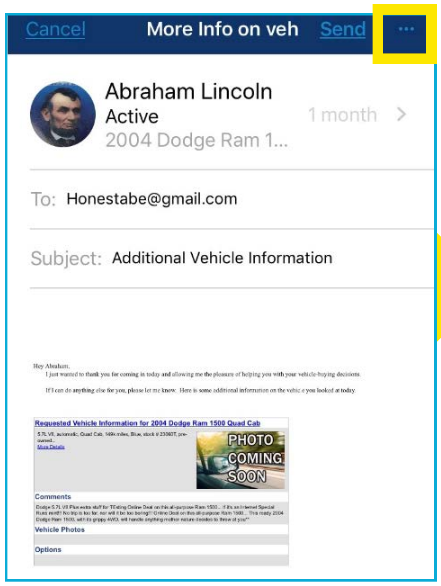

## 8. Completing Tasks

Tasks can be completed from the main menu or from the customer dashboard. To complete a **call task**, select the *Phone Icon* under the customer name. The log call screen will open. Place the call, log the information and select *Save*.

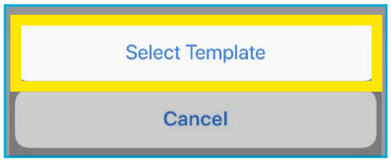


To complete an **email task**, click on the *Email Icon* under the customer name. The email screen will open. To access email templates, click the *three dots* on the top right corner, choose the template and hit *Select Template*. The template can be edited. Hit *Send*.

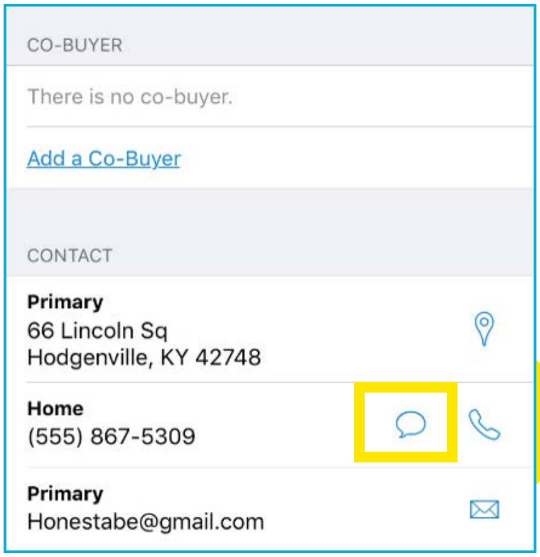


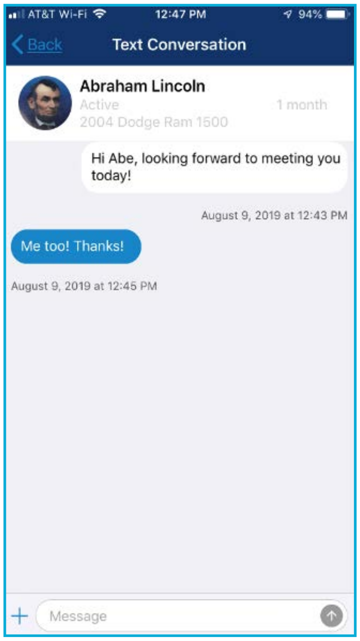




* Click the "..." to access templates



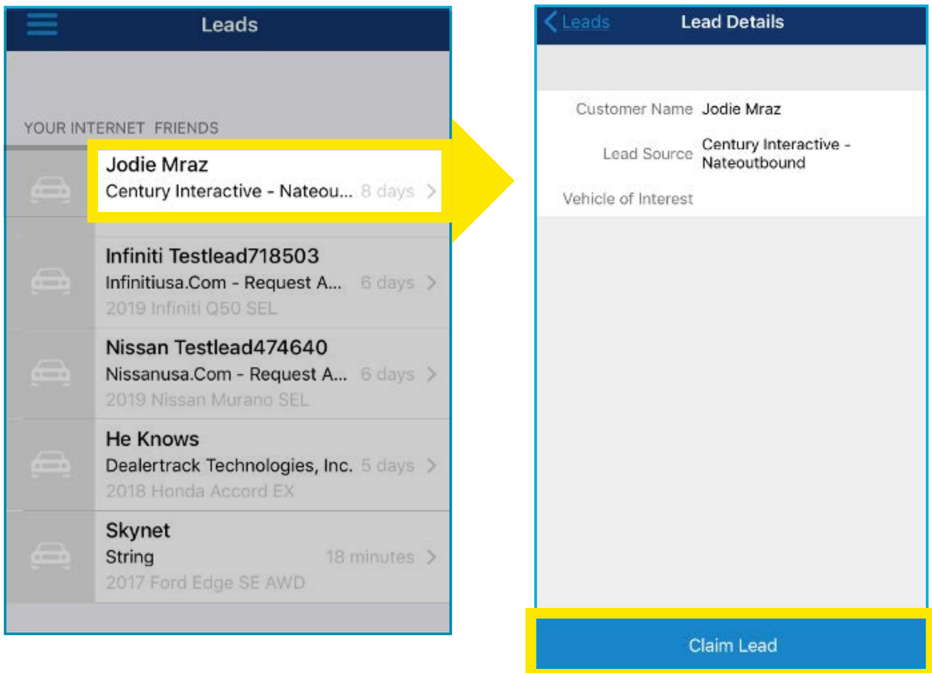

In order to **send a text**, the customer must first be opted in. Once the customer is opted in, the text bubble on the customer dashboard will be highlighted. Click on the *text bubble*, the text screen will open and begin the text.

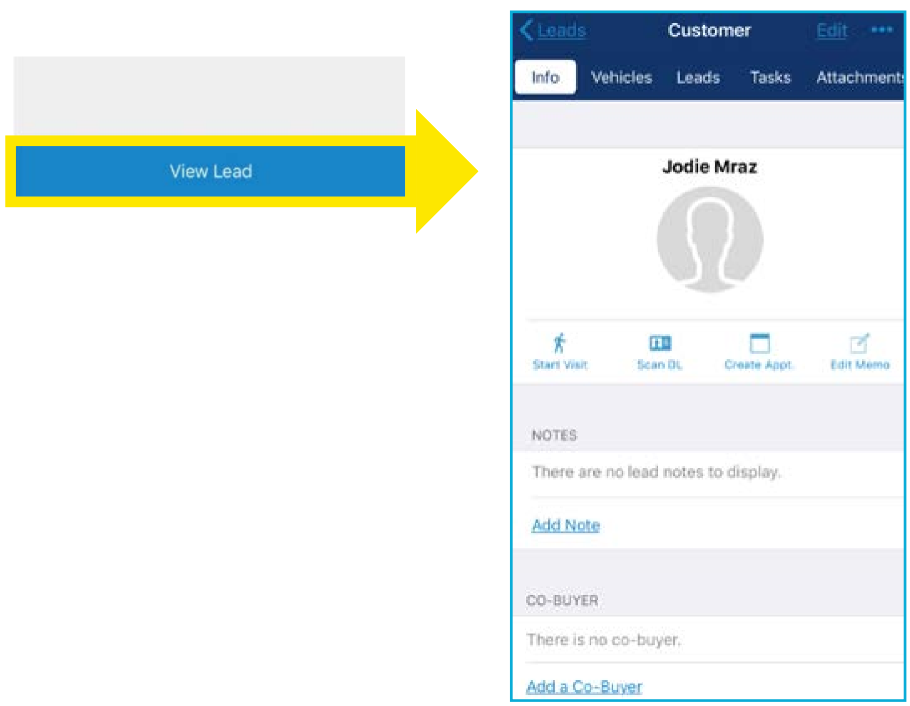


## 9. Leads Tab Main Menu

The lead bucket can also be accessed from here. To claim leads from the lead bucket, click on the lead to be claimed. Next click *Claim Lead* at the bottom. Click *View Lead* to access the customer dashboard then click on the *Tasks* tab on the customer dashboard to complete any necessary task associated with the lead.

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