Connect CRM Dashboard: Adding a Customer

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

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	Cancel					
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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*.

〈 Matches	Add Lead	Save
Tune		Malle in
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Source	Car Sho	w Event
Sales Rep	Deano E	Bambino
Sales Rep 2	Select Sale	es Rep 2
Start Visit?		
	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.

	Customers Customer						
Info Vel	nicles Lea	ads Ta	asks	Attack	nment		
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Waiting on tax returns							
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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*.





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.

stomers Customer <u>Edit</u>	eee <u>Cancel</u> Tra	de-In <u>Sav</u>
Vehicles Leads Tasks Attach	ments TRADE-IN INFORMATION	
	Year	Select Year
	Make	
Add a Vehicle	Model	
	Trim	
Vehicle of Interest		
Trade-In	VIN	VI
	Decode	
Cancel		
	Mileage	Enter Mileag

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.

Call

	Tasks		+	Abraham Lincoln
ASKS				2018 Audi Q3 TASK DESCRIPTION
	Abraham Lincoln	7/11/19		Call Abe when car is ready ar
>	Phone Call Abe when car is ready		>	Type Out
				Contacted Yes
				NOTES
				Required
				Follow Up
				Complete call task?
				Cancel pending email task?
				Save
				S Place Call

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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*.



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.

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CO-BUYER		<	Back	Text (Conversation	
There is no co-buyer.				Abraham Active 2004 Dodg	Lincoln le Ram 1500	1 month
Add a Co-Buyer				Hi Abe, lo today!	ooking forward t	o meeting you
CONTACT		Aus	Me too! Ti gust 9, 201	hanks! 9 at 12:45 PM	August 9,	2019 at 12:43 PM
Primary 66 Lincoln Sq Hodgenville, KY 42748	0					
Home (555) 867-5309	06					
Primary Honestabe@gmail.com						
		+	Mess	age		•



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.







