Salesperson Reference Guide
Tips to Adding Customers into VinConnect

1. Select the option for adding a new customer.

2. Choose the customer you want to add from the list.

3. Enter the customer's vehicle information.

4. Select the lead source and type.

5. Add the customer.
1. Check to See if the Customer is Already in the System:
   - **Search by Phone Number**: Type in a valid phone number and click on the binoculars icon to do a reverse White Pages lookup to save yourself from typing all customer information.
   - **Search by Zip Code**: Type in a zip code and click on the binoculars icon to search. This does a reverse lookup on the zip code again saving you from typing in city, state, and county.
   - Clicking *Find Customer* will start a search to see if the customer is already in VinConnect, if not you can instantly add a new customer.

2. Pick Customer:
   - If there is a potential match in VinConnect you will need to Select or Add New.
   - Click Select to add new opportunity to current customer, avoid re-typing customer’s profile, and avoid duplication, which potentially causes multiple tasks/processes triggering to that one customer.
   - Click Add New only if it is a brand new customer that is not a match to any other customer in the database.

   **Note**: This may require manager interaction if this it is not your customer. Can be easier to just notify manager and they can just update the customer’s profile to give you access to their record.

3. Find Vehicle:
   Type in the stock number or click Find to search and view details from your inventory.

4. Lead Source:
   How did the customer hear about you? Your chance to let management know what advertising is working to get more customers in front of you.

5. Lead Type:
   Determines what type of follow-up process will trigger in the system.
   - **Walk-In**: Customer is here in front of you. Showroom process does not trigger until the showroom visit is closed.
   - **Phone**: Customer is not here and starts the phone follow-up process.

**Must Haves for Add Customer**: Customer First Name, Customer Last Name, Lead Source (how did they hear about you?), Lead Type (Showroom or Phone).

*Note: VinConnect default settings. Dealer can choose to require email address and/or phone number before adding a customer.*
Customer Dashboard

<table>
<thead>
<tr>
<th>Status</th>
<th>Buyer/Co-Buyer</th>
<th>Created</th>
<th>Source</th>
<th>Vehicle</th>
</tr>
</thead>
<tbody>
<tr>
<td>Active</td>
<td>9/12/14</td>
<td>Truecar USA</td>
<td>2011 Ford F-150</td>
<td></td>
</tr>
</tbody>
</table>

**Lead Info**
- Status: Waiting for Prospect
- Sales Rep: John Doe
- BD Agent: None
- Manager: Jane Smith
- Created: 9/12/14 6:51p (27d)
- Source: Truecar (Usaa) (Internet)
- Contacted: No
- Attempted: 9/12/14 6:56p (0:05)

**Vehicle Info**
- Listed: 09/27/2014
- 2011 Ford F-150 (Certified)
- 4WD Truck (4 Door SuperCrew)
- Stock #: C637390
- 1FTFW1E1TBK97778
- 3.5L V6
- Automatic 6-Speed
- Odom: 55,636
- Color: Black
- Mfr code: W1E
- Location: Your Dealership

**Vehicle(s) of Interest**
Click to add additional vehicles of interest

**Trade-in Info**
(none entered)

**Buyer and Co-buyer Information:**
- Buyer
- Co-buyer

[Copy Buyer]
1. **Customer Information:**
   Click on the customer’s name to bring up their profile, as well as edit their information. Click on the additional information tab inside of the customer information screen to add customer’s credit app information.

2. **Vehicle Info:**
   Very important to always have a vehicle selected or manually type in year, make, model, so automated emails make sense.

3. **Trade-in Info:**
   Print Trade-In forms, push to VinConnect or 3rd Party Trade-In Appraisal tools, and links to Repeat Customer’s previous vehicles.

4. **Adding a Co-Buyer:**
   Click on *Copy Buyer* to add a co-buyer with the same contact information as the buyer or click on the *Add Co-Buyer* (2 faces) icon on the right to add a co-buyer that has different contact information from the buyer.

5. **Appointment:**
   Moves customer through the process and triggers alerts to remind you and the customer of the appointment.

6. **Visit:**
   Start the visit every time customer walks-in the dealer to move the customer through the processes.

7. **Wish List:**
   Don’t have the car the customer needs? Start a Wish List, and let VinConnect search daily to see if a car comes into inventory to meet your customer’s needs.

8. **Add New Lead:**
   Add additional opportunities to sell another vehicle to a repeat customer.

9. **Create Task or Alert:**
   Allows you to create a task for yourself or anyone at the dealership. Alert your managers of issues or get your co-workers to back you up on your day off.
Completing Tasks

### My Tasks

- **Status:** All Statuses

#### Lead Bucket (3)

<table>
<thead>
<tr>
<th>Customer</th>
<th>Source</th>
<th>Created</th>
<th>Bucket</th>
</tr>
</thead>
<tbody>
<tr>
<td>John Smith</td>
<td>Autofusion-Text</td>
<td>10/8 10:29 AM</td>
<td>Your Dealership Used Internet Team</td>
</tr>
<tr>
<td>John Smith</td>
<td>Autofusion-Text</td>
<td>10/8 10:32 AM</td>
<td>Your Dealership Used Internet Team</td>
</tr>
<tr>
<td>John Smith</td>
<td>Routeone Lic</td>
<td>10/8 11:26 AM</td>
<td>Your Dealership Used Internet Team</td>
</tr>
</tbody>
</table>

#### New Leads (0)

No leads to display.

#### Replies (2)

<table>
<thead>
<tr>
<th>Customer</th>
<th>Status / Source</th>
<th>Updated</th>
<th>Age</th>
</tr>
</thead>
<tbody>
<tr>
<td>John Smith</td>
<td>Delivered</td>
<td>10/7/14</td>
<td>13</td>
</tr>
</tbody>
</table>

- **Message:** You have received a new lead, call customer immediately. (dismiss) (Edit)
  - Assigned To: John Doe
  - Type: Lead Task

- **Message:** Email - email customer availability - details of the vehicle - confirm price and answer any questions/comments (dismiss) (Edit)
  - Assigned To: John Doe
  - Type: Lead Task

- **Message:** Reply to customer email (dismiss) (Edit)
  - Assigned To: John Doe
  - Type: Assigned Task

- **Message:** The prospect just viewed this email. (dismiss) (Edit)
  - Assigned To: John Doe
  - Type: Assigned Task

<table>
<thead>
<tr>
<th>Customer</th>
<th>Status / Source</th>
<th>Updated</th>
<th>Age</th>
</tr>
</thead>
<tbody>
<tr>
<td>John Smith</td>
<td>Active Lead</td>
<td>10/8/14</td>
<td>1</td>
</tr>
<tr>
<td>2010 Ford F-150 [N637245]</td>
<td>Drive By (Lot Up)</td>
<td>11:32a</td>
<td></td>
</tr>
</tbody>
</table>

- **Message:** Reply to customer email (dismiss) (Edit)
  - Assigned To: John Doe
  - Type: Assigned Task

#### Follow Ups (0)
1. New Leads:
New Internet (ADF/XML) Leads populate here. You must complete an outbound call or outbound email to stop the clock. (Automated emails DO NOT stop the clock!)

2. Email Reply from Customer:
Always respond and make sure you have the last word with the customer.

3. Phone Tasks:
   - Click Making or Receiving call
   - Click the number you dialed
   - Click if you Made Contact, Left Message, or No Contact.

   **IMPORTANT:** ENTER GOOD NOTES. If it’s not in VinConnect, it didn’t happen.
   - Click Save to save the call record and complete the call task.

4. Email:
   - (A) Select template and customize to the customer’s current situation.
   - (B) Add VinBrochure to quickly show details and pictures of primary vehicle of interest.
   - (C) Click on Insert Similar Vehicles to quickly show options to customer.

5. Alerts:
**DO NOT JUST DISMISS,** review customer’s dashboard:
   - Click on a customer, and look at the notes & history to see what is happening or how the customer is engaging with you.
   - Is a manager or other employee trying to alert you to a situation with this customer?
1. Quick Search:
   • **By Customer:** Type a last name, phone, email, or first initial & last name to find a customer in the database.
   • **By Inventory:** Type in a stock number, make, or model to quickly search your inventory.

2. Advanced Search:
   Use filters to search for lists of your customers to prospect and create new opportunities, based on specific timeframe, lead type, lead source, or vehicle.
   • **Not Recently Contacted:** Customers listed here have not been contacted in the past 2 weeks. Don’t let your customer fall through the cracks.
   • **Lease Prospects Dashboard:** List of customers whose lease is expiring within the next 180 days.

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![Screenshot of Quick Search and Advanced Search features](image)