

1. Adding User

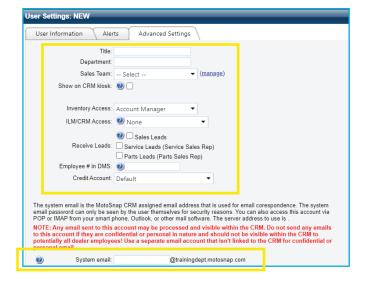
To add a user go to: Settings > User List > Add, from there, proceed to add the following:

	Training Departr #6546 Andrew Hughes view McPherson		0	Today	0 0 0 0 0 New Leads Activity Showhorn April	[Customer 🗸 Search	×	
CRM	Inventory Desking Commun		Campaigns	Webs	sites VinLens Insights Settings Admin			WalkM	e 🚺
ser List	ættings ∨ My Settings Users ∨ IL er Signatures	Wy Oravi Sett	ings + Dining					Ad	Id
	User Info	DMS ID	Inv. Access	Rcv Lds	CRM Access	_		Login	
✓ Gro edit	<u>eup: Admin</u> Dealertrack CorpTrainers (Dealertrack1) <u>dt@trainingdeot motosnap.com</u>	DLS	Inventory Manager		Admin (<u>view as</u>) Salesperson			5/27/20 6:23p	
edit	Donyelle Admin (donyelleadmin)		Account Manager		Admin (<u>view as</u>)				
edit	John Rower (JohnRower6546) JohnRower@trainingdept motosnap.com	1234	Salesperson				johnrower68@gmail.com	3/18/20 10:47a	
edit	Justin Admin (Justinadmin1)		Account Manager		Admin (<u>view as</u>) Manager			6/26/19 9:36a	
edit	Marcus Davis (Marcus6546) mdavis@trainingdept.motosnap.com	1316	Account Manager	Yes	Admin (<u>view as</u>)		marcusd@continentalmotors.com	2/20/20 10:32a	

- Username: First Initial/Last Name/Store Number (ex: Jsmith0001)
- Password: Minimum of 7 characters with at least 1 number and 1 capital letter.
- Email Signature must be added for every active employee in VinConnect. No emails without signatures!
- Hours: Very important if leads are being assigned based on reps schedules. Must update daily/weekly based on schedule.
- Title: Populates Auto Fill Fields in Email templates.
- Sales Teams: Gives the ability to separate employees into teams for reporting purposes.

Jser Information	Alerts	Advanced Setting	IS		
Username:			Hours	1	
Password:				T From	То
Confirm:			Monday [9:00 AM	8:00 PM
First Name:			Tuesday (9:00 AM	8:00 PM
Last Name:					0.00 FIVI
Email:	0		Wednesday (9:00 AM	8:00 AM
			Thursday (9:00 AM	8:00 PM
Work Phone:		ext	Friday	9:00 AM	8:00 PM
Cell Phone:					0.00110
Home Phone:			Saturday (9:00 AM	5:00 PM
Pager:			Sunday	v	
Fax:			Set to defaults		

- Email: Your current work email address. This is what you will use to recover your password and receive alerts.
- System Email: Your CRM email address. Include your first initial and last name (ex. Jsmith) Expand your name or add numbers when needed.
- Receive Leads: Will this person receive internet leads? Check the boxes that apply.
- Employee # in DMS: Not required when creating the user, but important to add if you have this information on hand.



Adding User : Inventory/ILM/CRM Access

What can they see and do?

Inventory Access	ILM/CRM Access
Salesperson: It allows the user to associate a customer with a vehicle. They can email options and photos to the customer. They can search for inventory but can't edit any vehicles. They don't havethe "Inventory" main tab or any of the reports.	Salesperson: This allows the user to add customers, send emails, clear tasks, and send information on vehicles. They cannot view other salesmen's customers by default. They can't flip ownership of leads. They don't have access to the desking, reports, service, or website tabs.
Inventory Manager: These users have the inventory tab and the reports. They can add photos and change details on the car as well as post to Craigslist and eBay and print window stickers and buyers guides.	Manager: These users can see information and customers belonging to others. They have the desking, reports, and campaigns tabs. They can flip ownership of customers and they can add users and change passwords for others.
Account Manager: These users have all the other functions plus they can see cost by default. Also, grants access to the Websites Tabs.	Admin: Full access to all settings within VinConnect, including ILM/CRM Settings. They can create or destroy at will.

*Exceptions for additional access can be granted. Please contact your Performance Manager or Support with questions.

Adding User : Selecting User Type What will the system tell me to do?

User types serve the purpose of title and role. They do NOT affect access. Primarily, roles are used to group similar users into categories. This allows tasks or actions to be assigned to a role based on your processes.

Example: The system can automatically assign a BD agent by choosing from all users that have BD agent selected as a user type.

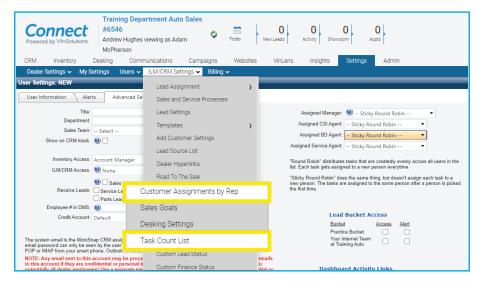
User Types	
Salesperson	
Internet Salesperson	
Manager	
BD Agent	
CSI Agent	
Service Agent	
BDC Dept. Manager*	
GM*	
GSM*	
Service Dept. Manager*	
Finance Manager	
Finance Dept. Manager*	
Dealer Principal*	
Orphan Salesperson*	
Orphan Service Customers*	
Internet Lead Bucket	
Operator/Receptionist	
Service Advisor	
* = Only one person can be this role	

2. Deleting User

As soon as someone leaves your dealership you should immediately change their password and delete their email so they can no longer access VinConnect or request to update their password to get back into VinConnect. To do this go to Settings > Users, and click Edit on appropriate user.

Before you delete the user, you should ensure that they have no outstanding follow-up tasks. You can remove their older task in bulk by going to Settings-> ILM/CRM Settings-> Task Count List.

You'll also need to reassign their customers to salespeople or the orphan bucket at Settings-> ILM/CRM Settings-> Customer Assignments by Rep. Also, ensure that you make the right decision regarding triggering the sales rep change process.



Drag and drop the users or the orphan bucket to the column on the right to have the leads assign equally amongst the selected users. Only check the trigger sales process if you want a task to fire for EVERY lead (usually you should not do this). Click Reassign once you're ready to distribute the leads to your selected users.

Reassign Le	eads	Sales Reps		Selected Reps	
This user has 3 custome	N5.	Alan Gholston		Allan Iverson	
	ame(s) from the left box to the right er is selected, the leads will be pin.	Anakin Skywalker		Alyson Burnett	
Sales Reps	Selected Reps	Andy Alvarez			
Alan Gholston	Allan iverson	Andy Riedel			
Anakin Skywalker	Alyson Burnett	Autumn Sales			
Andy Alvarez		Bat Woman			
Andy Riedel		bac woman	_		
Autumn Sales		Beth W			
Bat Woman		□ T .:			
Beth W	· ·	Trigger Process			
Trigger Process By checking this box, the triggered for this custome	Sales Rep Changed process will be er.	By checking this box, triggered for this cust		ep Changed process wil	l be
	Cancel Reassign			Cancel Reass	sign

Conne Powered by VinSc	#6546 Andrew Hughes McPherson	artment Auto Sales	Co Today	0 0 0 0 0 0	Connect Training Department Auto Sales #6554 #6554 Andrew Hughes viewing as Adam Tool Antre D New Leash Moder Hughes viewing as Adam Tool Antre D D CRM Inventory Desing Campaigns Websites VriLens Insights Settings Admin
CRM Invento	, o	nunications Campa	<u> </u>	ites VinLens Insights Settings Ac	Dealer Settings 🗸 My Settings Users 🗸 ILM/CRM Settings 🗸 Billing 🗸
	ay be different from the task count o erdue if it was supposed to be done		, the number of task	s is based on the number of actual tasks. On the CRM dashboard.	Customer Assignments by Rep User Types: Sales Rep Lead Status: Active
a task is considered ovi					to assign leads to different users.
User	r Name	Not Overdue	Overdue		
User		Not Overdue	Overdue		to assign leads to different users.
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Now you can delete the user out of VinConnect by going to Settings > Dealer Settings > Users, then click Edit

Con Powered by		t #6 And	546	s viewing as A	e	Today	0 New Leads	0 Activity	0 Showroom	0 Appts
CRM	Inventory	Desking	g Com	nmunications	Campaign	s Webs	sites VinLens	Insight	s Settings	s Admin
Dealer Set	tings 🗸	My Settings	Users 🗸	ILM/CRM	Settings 🗸 🛛 Bil	ling 🗸				
Dealers >> E	dit: Trainir	ng Departme	ent Auto Sa	les (VS #654	6)	_		_		_
	<u> </u>	Y	Y				Users & Groups)		
Dashboard Below is a list of	Main users for thi	Imports s dealership, n	Exports ot including yo	VinBuddy ourself. You can	Billing Setup edit or delete other	Invoices existing users,	or click "Add" to add a	new user to yo	our dealership.	
		s dealership, n	ot including yo	,				new user to yo	our dealership.	
Below is a list of	f users for thi		ot including yo	,				new user to yo	our dealership.	
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Check the box next to the dealerships you want to delete this user from. Click on the "Remove access from selected dealership" button and confirm "Ok" to delete the user.

1	Jimmy Ansell Edit	-		
Re	emove access from selected dealership			
-	Dealer ID		Dealer Name	Ilm Access
	□ 1✓ 6546		Cox Motors Demo	SalesPerson
			Training Department Auto Sales	Admin

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