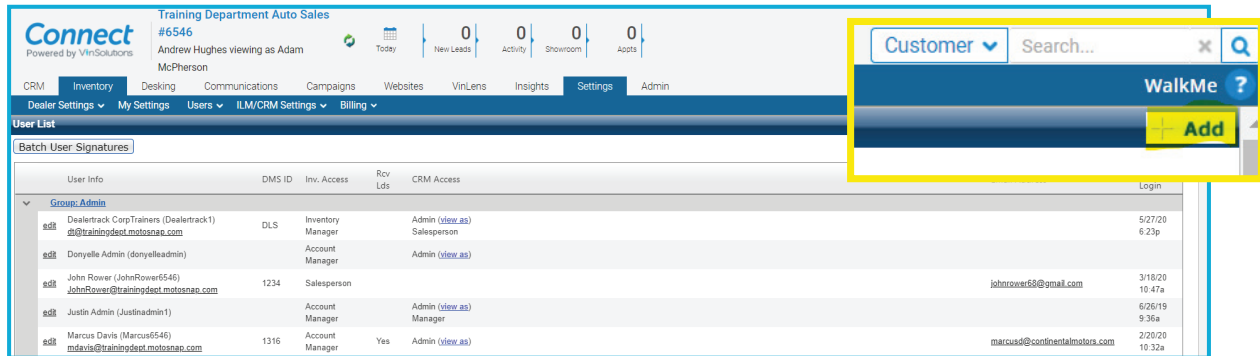


1. Adding User

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



- 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.
- 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.

The system email is the MotoSnap CRM assigned email address that is used for email correspondence. The system email password can only be seen by the user themselves for security reasons. You can also access this account via POP or IMAP from your smart phone, Outlook, or other mail software. The server address to use is

NOTE: Any email sent to this account may be processed and visible within the CRM. Do not send any emails to this account if they are confidential or personal in nature and should not be visible within the CRM to potentially all dealer employees! Use a separate email account that isn't linked to the CRM for confidential or personal email!

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 have the "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

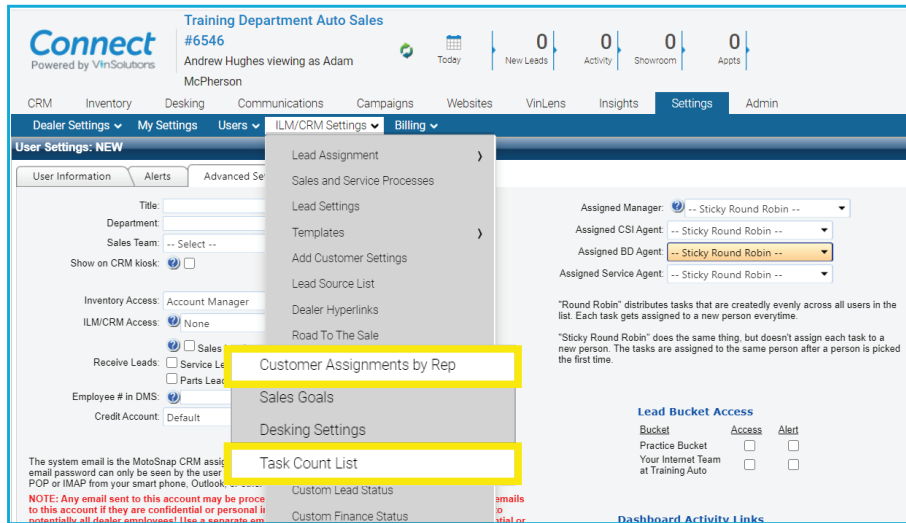
* = Only one person can be this role

2. Deleting User

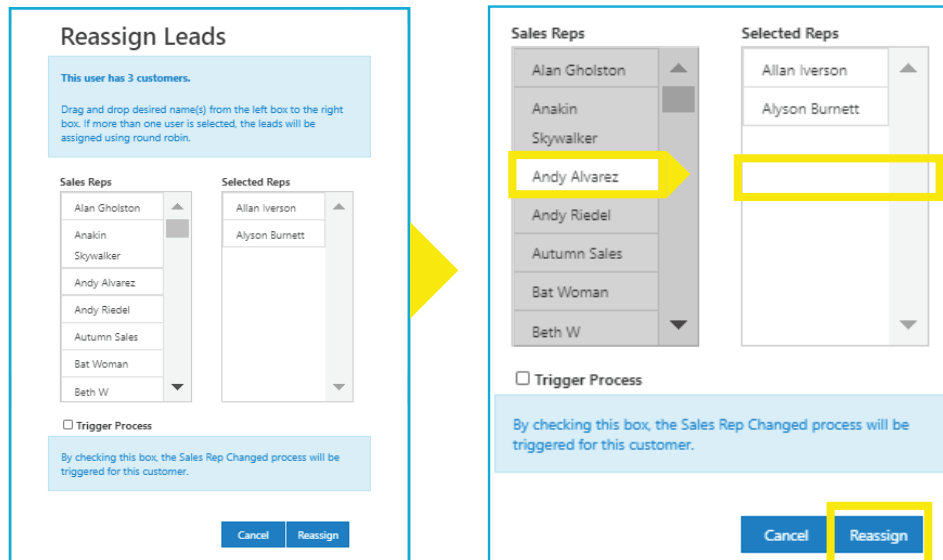
As soon as someone leaves your dealership you should immediately change their password and delete their email so they can no longer access VinConnect or request to update their password to get back into VinConnect. To do this go to Settings > Users, and click Edit on appropriate user.

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.



Training Department Auto Sales #6546
Andrew Hughes viewing as Adam
McPherson

CRM Inventory Desking Communications Campaigns Websites VinLens Insights Settings

Dealer Settings My Settings Users ILM/CRM Settings Billing

User Task Counts

NOTE: This number may be different from the task count on the CRM Dashboard. Here, the number of tasks is based on the number of actual tasks. On the CRM dashboard, a task is considered overdue if it was supposed to be done 36 hours ago.

User Name	Not Overdue	Overdue
amcpherson6546	0	5
Agholston1	0	1
amccabe15331	0	1
amccabe2	0	1

Training Department Auto Sales #6546
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Customer Assignments by Rep

Below is a list of users and the number of customers assigned to them. This list also includes how many customers are not assigned to a user. Select Reassign to assign leads to different users.

User Types: Sales Rep Lead Status: Active

Reassign	Rollback	Username	Customers	Reassign
		amcpherson6546	3	Reassign
		amccabe1	3	Reassign
		AlexMcCabe	2	Reassign
		aalvarez16546	3	Reassign

Now you can delete the user out of VinConnect by going to Settings > Dealer Settings > Users, then click Edit

Training Department Auto Sales #6546
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CRM Inventory Desking Communications Campaigns Websites VinLens Insights Settings Admin

Dealer Settings My Settings Users ILM/CRM Settings Billing

Dealers >> Edit: Training Department Auto Sales (VS #6546)

Dashboard Main Imports Exports VinBuddy Billing Setup Invoices Users & Groups

Below is a list of users for this dealership, not including yourself. You can edit or delete other existing users, or click "Add" to add a new user to your dealership.

+ Add

edit	Username	First Name	Access
	delvec2	Ryan	Account Manager
	admin6546	Dustin	Account Manager
	moosaadmin	moosa	Account Manager
	donyelleadmin	Donyelle	Admin
	PatrickAdmin1	Patrick	Admin
	mdtraining36546	Mark	AdmTraining

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.

Jimmy Ansell Edit

Remove access from selected dealership

Dealer ID	Dealer Name	Ilm Access
<input type="checkbox"/> 1	Cox Motors Demo	SalesPerson
<input checked="" type="checkbox"/> 6546	Training Department Auto Sales	Admin