Connect Release Notes

Release Date: April 19, 2016

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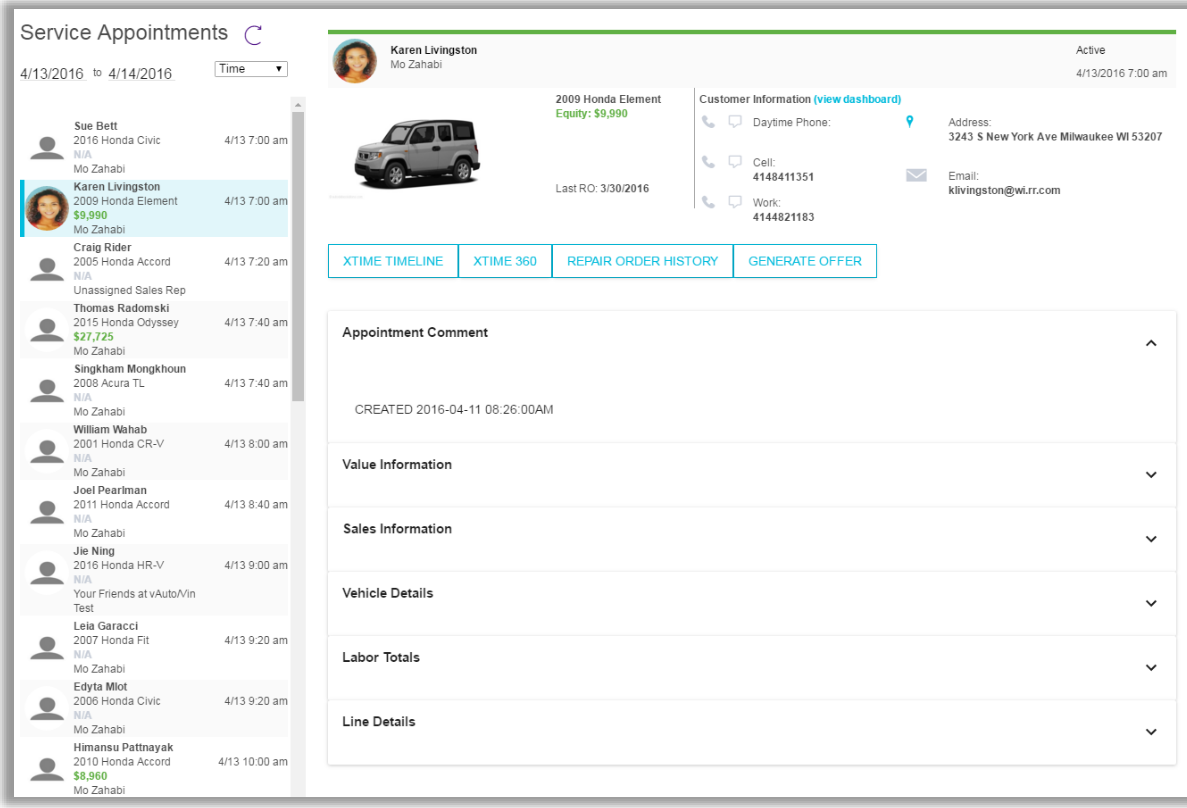
Service Appointment Dashboard

This new screen will allow staff in the dealership with Manager access to have better visibility of upcoming service appointments and information about them including:

- Customer information
- Vehicle Information
- Estimated Equity
- Current Sales Rep
- Appointment details
- Customer Value to the dealership
- Vehicle Sale Details

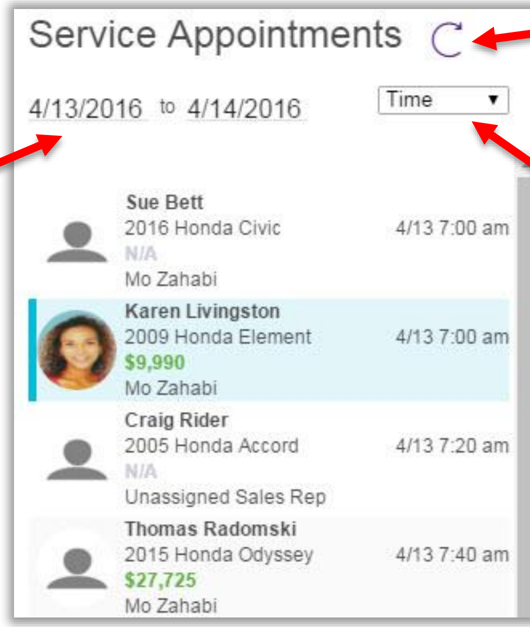


Your Performance Manager will work with you to enable this functionality for your business.

Service Appointment Dashboard

The service appointment dashboard is set up to show a list of the appointments in the left frame (master section). Selecting any of these records will display the details of that appointment in the right frame.

By default the screen will display appointment data for the current day and next day. The date range can be adjusted up to a 30 day time frame.



The refresh button will reload the data in the master section.

The list of appointments can be sorted by:

- Appointment Time
- Estimated Equity Amount
- Assigned Sales Rep

Within each record users will be able to see:

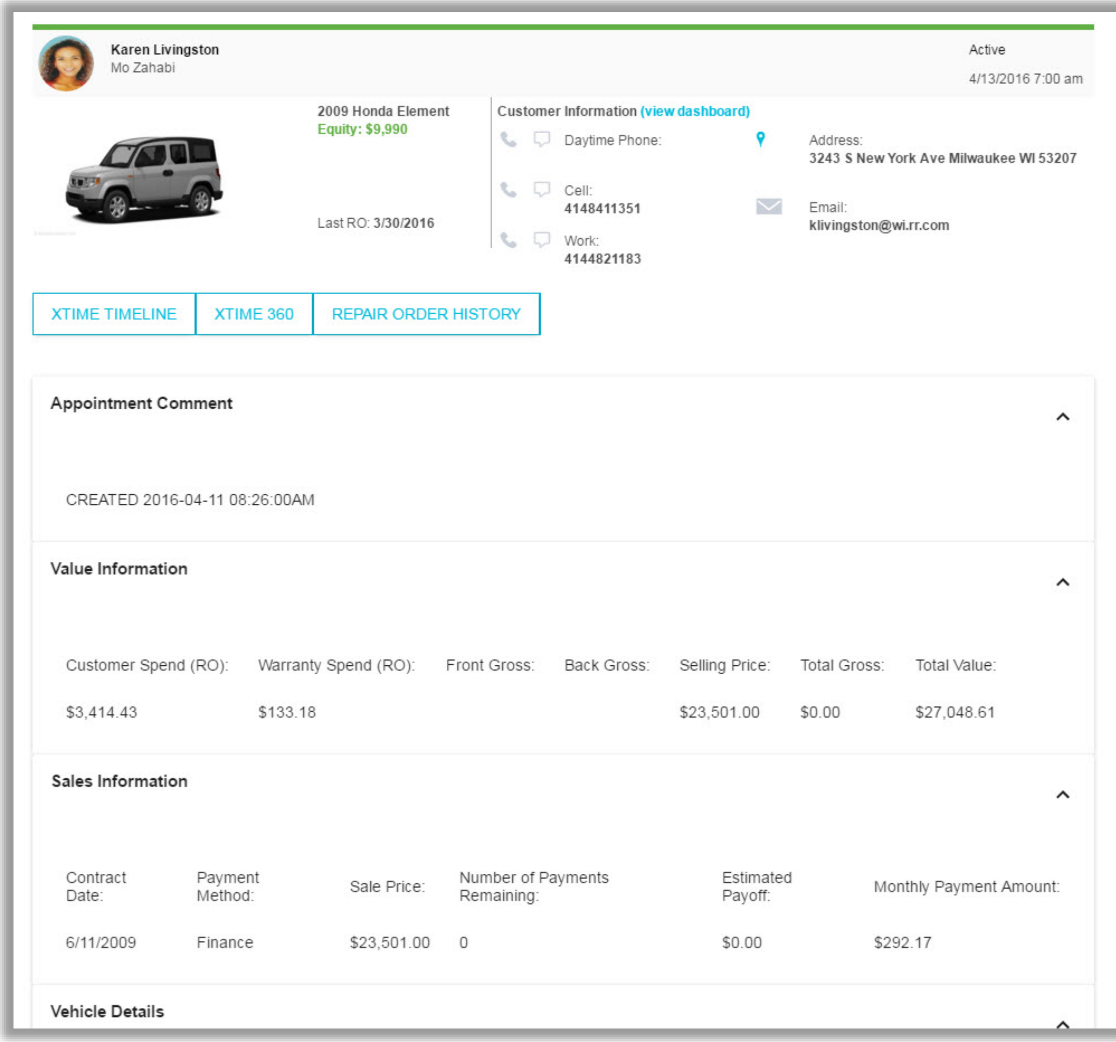
- Appointment Date & Time
- Customer License Photo if available
- Customer Name
- Vehicle Year, Make and Model
- Estimated Equity
- Assigned Sales Rep

Service Appointment Dashboard

Once a record has been selected, it will be displayed in the details section on the right side of the page. This is where users can see additional details about the customer, vehicle and the service appointment including:

- Vehicle information with a stock photo, estimated equity and RO history if available.
- Customer information including contact information and a link to the customer dashboard.
- Quick links to the Xtime Vehicle Timeline and Xtime Customer 360 View for users with Xtime access.
- Quick link to view the RO history on file for the vehicle.
- Additional information including the appointment comment, customer value information, vehicle sale information, vehicle details and service appointment line items if available.
- Link to customer address in Google Maps.

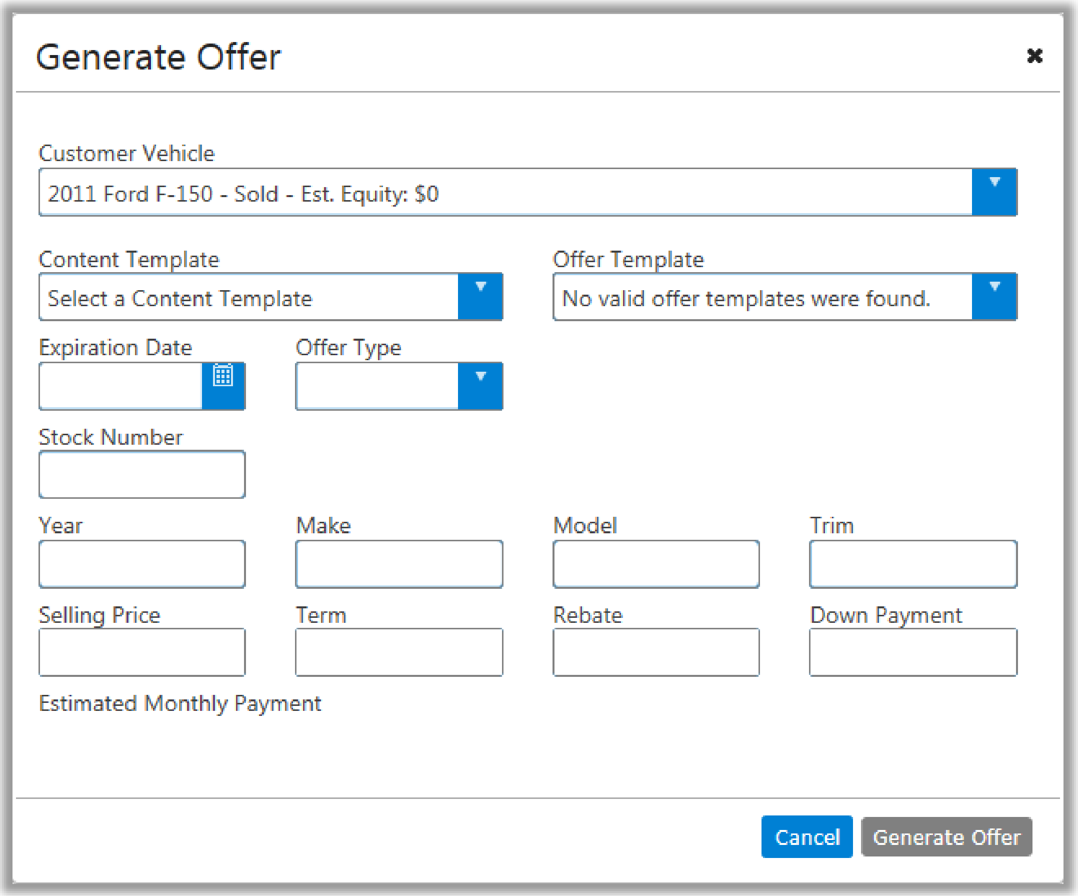
Future enhancements will allow for calls or emails to be placed directly from this screen.



Target

TargetPro Only: Users now have the ability to manually create or edit an offer when using Generate Offer from the Customer Dashboard. Salespeople must have the “Can Desk Deals” setting enabled.

Settings > Users > User List > Edit > Advanced Settings > Can Desk Deals

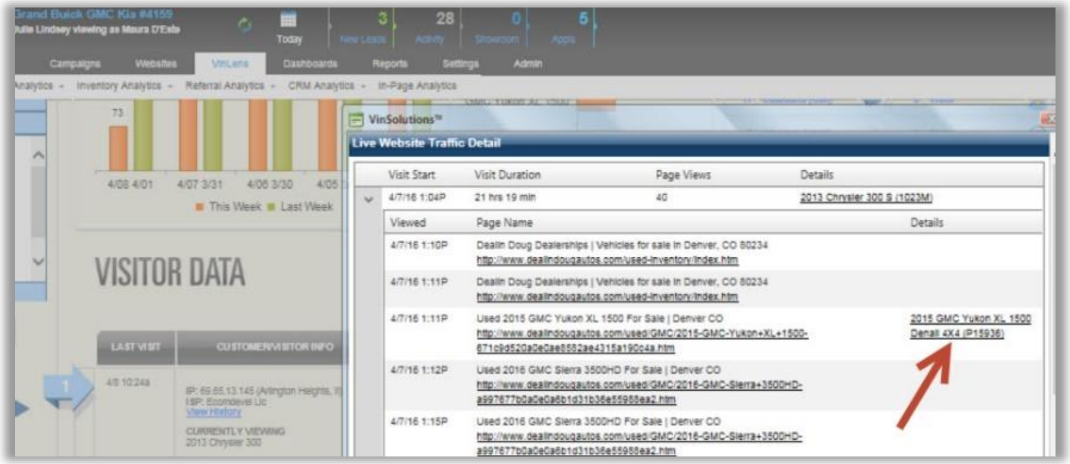


Target

Release date	Enhancements
4/12/16	Max events per day schedules more accurately when exporting to campaigns
3/29/16	Lease difference fields calculate properly when monthly payment is $0
3/29/16	Fixed bug where customers were receiving a campaign more than once.
3/30/16	Users now able to Export files to Excel.

VinLens/VinURL

Stock Numbers for vehicles viewed on Dealer.com websites with combined inventory now show in VinLens Live Website Traffic Detail. This can be found in the CRM account where the Dealer.com combined inventory website is configured.



Expected Release date	Description
4/12/16	VinLens Functionality was fully tested for Canadian Dealer.com websites and confirmed to have the same functionality as VinSolutions domestic websites with the exception of 1 bug. Canadian visitor map issues will be addressed in another ticket.
4/20/16	Pre and Post lead website activity for non-website ADF leads will display in the customer dashboard after customer clicks website backlink from CRM email.

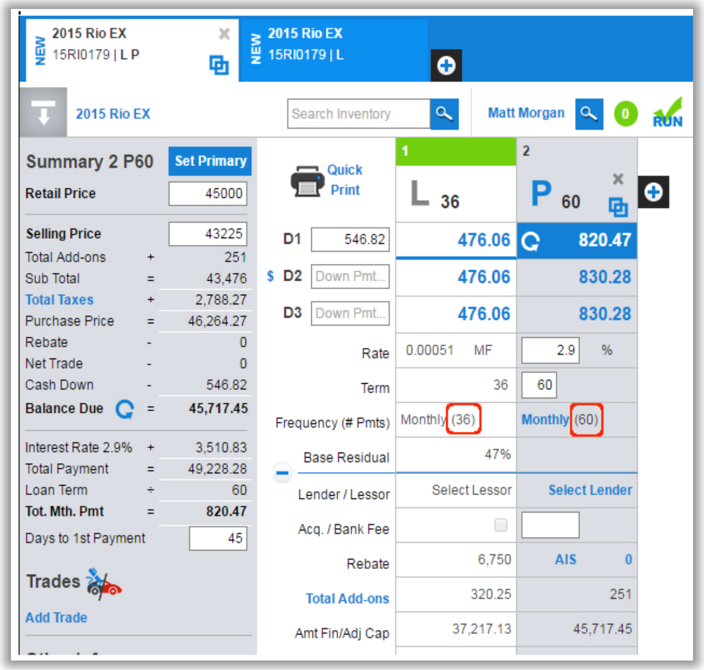
Communication Bug Fixes

Release Date	Description
4/1/16	Corrected bug which prevented some emails from forwarding out of CRM into SmarterMail.
4/1/16	Fixed error which was causing some inbound call tracking numbers to receive error message “Sorry, an application error has occurred, goodbye”
4/1/16	When a customer replies via SMS, tasks are now processing and an alert is delivered to the salesperson.
4/11/16	Update to API to accept new statuses from vendor which was causing errors on CarDashboard under SMS Settings.

Additional CRM Enhancements and Bug Fixes

Release date	Description
4/19/16	We removed the lead status and date range filter from the 'Find Duplicates' function on the Customer Dashboard, so now ALL potential duplicates are returned regardless of age or status. Previously, only leads that were active and less than 90 days old were considered.

Desking



To allow for various payment frequency options (bi-weekly, monthly, etc), the user interface will now calculate and display the count of payments in the desking scenario.

TFS#	Salesforce #	Release Date	Description
42106		4/19/16	The Rebate screen will now offer ‘Apply to Similar Scenarios’ capability

Unmatched email Inbox

When an email with attachments is matched to a customer dashboard from the Unmatched Inbox, the attachments will follow. They are accessed by opening the email on the customer dashboard.