

# **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

The screenshot displays the 'Service Appointments' dashboard. On the left, a list of appointments is shown for the dates 4/13/2016 to 4/14/2016. The selected appointment is for Karen Livingston, a 2009 Honda Element with an estimated equity of \$9,990, scheduled for 4/13 at 7:00 am. The right-hand side of the dashboard provides a detailed view for this appointment, including the sales rep's profile (Karen Livingston, Mo Zahabi), a photo of the vehicle, and customer information (address, phone, email). Below this, there are buttons for 'XTIME TIMELINE', 'XTIME 360', 'REPAIR ORDER HISTORY', and 'GENERATE OFFER'. The bottom section of the dashboard contains expandable sections for 'Appointment Comment', 'Value Information', 'Sales Information', 'Vehicle Details', 'Labor Totals', and 'Line Details'.


Customer Name	Vehicle	Equity	Appointment Date/Time	Sales Rep
Sue Bett	2016 Honda Civic	N/A	4/13 7:00 am	Mo Zahabi
<b>Karen Livingston</b>	<b>2009 Honda Element</b>	<b>\$9,990</b>	<b>4/13 7:00 am</b>	<b>Mo Zahabi</b>
Craig Rider	2005 Honda Accord	N/A	4/13 7:20 am	Unassigned Sales Rep
Thomas Radomski	2015 Honda Odyssey	\$27,725	4/13 7:40 am	Mo Zahabi
Singkhom Mongkhoun	2008 Acura TL	N/A	4/13 7:40 am	Mo Zahabi
William Wahab	2001 Honda CR-V	N/A	4/13 8:00 am	Mo Zahabi
Joel Pearlman	2011 Honda Accord	N/A	4/13 8:40 am	Mo Zahabi
Jie Ning	2016 Honda HR-V	N/A	4/13 9:00 am	Your Friends at vAuto/Vin Test
Leia Garacci	2007 Honda Fit	N/A	4/13 9:20 am	Mo Zahabi
Edyta Mlot	2006 Honda Civic	N/A	4/13 9:20 am	Mo Zahabi
Himansu Pattnayak	2010 Honda Accord	\$8,960	4/13 10:00 am	Mo Zahabi

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.

Service Appointments 

4/13/2016 to 4/14/2016

 <b>Sue Bett</b> 2016 Honda Civic N/A Mo Zahabi	4/13 7:00 am
 <b>Karen Livingston</b> 2009 Honda Element <b>\$9,990</b> Mo Zahabi	4/13 7:00 am
 <b>Craig Rider</b> 2005 Honda Accord N/A Unassigned Sales Rep	4/13 7:20 am
 <b>Thomas Radomski</b> 2015 Honda Odyssey <b>\$27,725</b> Mo Zahabi	4/13 7:40 am

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


 **Karen Livingston**  
2009 Honda Element 4/13 7:00 am  
**\$9,990**  
Mo Zahabi

# 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.*



**Karen Livingston**  
Mo Zahabi

Active  
4/13/2016 7:00 am

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2009 Honda Element  
Equity: \$9,990

Last RO: 3/30/2016

Customer Information ([view dashboard](#))

Daytime Phone: 📍 Address: 3243 S New York Ave Milwaukee WI 53207

Cell: 4148411351 ✉ Email: klivingston@wi.rr.com

Work: 4144821183

XTIME TIMELINE
XTIME 360
REPAIR ORDER HISTORY

**Appointment Comment** ^

CREATED 2016-04-11 08:26:00AM

**Value Information** ^

Customer Spend (RO):	Warranty Spend (RO):	Front Gross:	Back Gross:	Selling Price:	Total Gross:	Total Value:
\$3,414.43	\$133.18			\$23,501.00	\$0.00	\$27,048.61

**Sales Information** ^

Contract Date:	Payment Method:	Sale Price:	Number of Payments Remaining:	Estimated Payoff:	Monthly Payment Amount:
6/11/2009	Finance	\$23,501.00	0	\$0.00	\$292.17

**Vehicle Details** ^

# 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

### Generate Offer ✕

Customer Vehicle  
2011 Ford F-150 - Sold - Est. Equity: \$0

Content Template  
Select a Content Template

Offer Template  
No valid offer templates were found.

Expiration Date  

Offer Type

Stock Number

Year

Make

Model

Trim

Selling Price

Term

Rebate

Down Payment

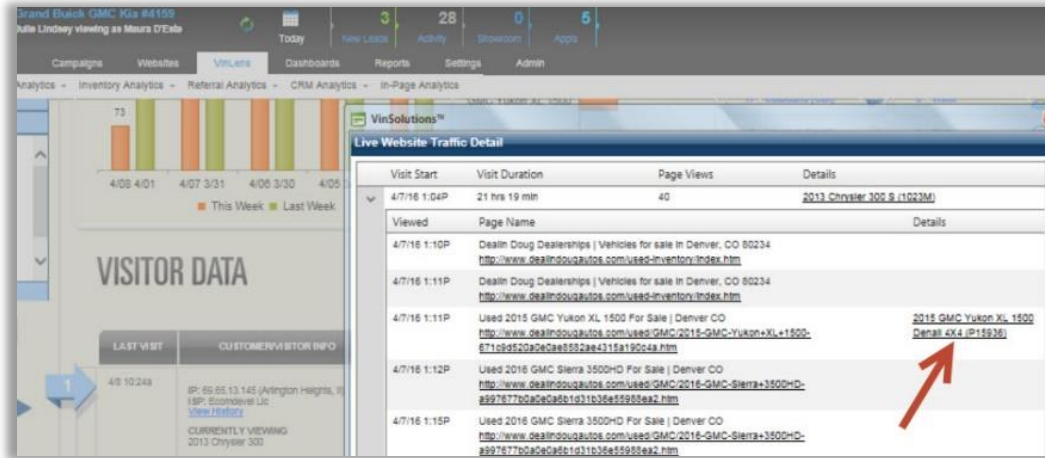
Estimated Monthly Payment

# 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

2015 Rio EX  
15R10179 | L P

Search Inventory Matt Morgan 0 RUN

Summary 2 P60 Set Primary

Retail Price 45000

Selling Price 43225

Total Add-ons + 251

Sub Total = 43,476

Total Taxes + 2,788.27

Purchase Price = 46,264.27

Rebate - 0

Net Trade - 0

Cash Down - 546.82

Balance Due = 45,717.45

Interest Rate 2.9% + 3,510.83

Total Payment = 49,228.28

Loan Term + 60

Tot. Mth. Pmt = 820.47

Days to 1st Payment 45

Trades Add Trade

Quick Print

	1	2
D1	546.82	476.06
D2	Down Pmt...	476.06
D3	Down Pmt...	476.06
Rate	0.00051 MF	2.9 %
Term	36	60
Frequency (# Pmts)	Monthly (36)	Monthly (60)
Base Residual	47%	
Lender / Lessor	Select Lessor	Select Lender
Acq. / Bank Fee	<input type="checkbox"/>	
Rebate	6,750	AIS 0
Total Add-ons	320.25	251
Amt Fin/Adj Cap	37,217.13	45,717.45

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
<a href="#">42106</a>		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.

