

Connect Jan. 2017 Release Notes

Following are the Connect CRM enhancements and fixes scheduled for release Jan. 19.

If you have any questions regarding these enhancements, please contact your VinSolutions performance manager or VinCare Support at 800.980.7488.

Service Appointments

- A new **Auto-Complete Service Appointment Leads** setting is available, which will allow Service Appointment Leads to be automatically marked as complete. When this setting is enabled, users will no longer be required to manually update records in **Connect**.

See related Knowledge Base article #1518.

- Admin and Manager level users now have the ability to cancel service appointments from the **Customer Dashboard** and **Service Appointments** page.

See related Knowledge Base article #1512 for Customer Dashboard or article #1513 for Service Appointments page.

Tasks

- Users will now be able to quickly **Assign Sales Rep** or **Create a Task** from the **Service Appointments** page list.

See related Knowledge Base article #1514 for Assigning a Sales Rep or article #1515 for Creating a Task.

- On the **Tasks** page, duplicate tasks will no longer show up from **Follow Ups** and **Service Tasks**.
- On the **Tasks** page and **VinDash**, the number of tasks and appointments will now match.

Leads

- In response to dealer feedback, the **New Opps** pie chart on the **Daily Activities** panel (**CRM > Dashboards**) will no longer include imported Service Leads.
- For Salespeople, on the **Tasks** and **Leads** page under **Recent Leads** the Sales, Service, and Parts Leads will now be grouped separately.
- For incoming Service Appointment Leads, Salespeople will no longer be incorrectly assigned as the Service Sales Rep.

Target

- Target contact columns and data fields have been added and combined. Some data fields will be applicable for United States and Canada, and some will be specific depending on the location.

See related Knowledge Base article #1524.

Connect Interface Updates

- In order to provide users with a more consistent appearance and functionality, as well as a simpler user experience, the **Connect** CRM will gradually be undergoing an interface update. Starting with the Jan. release users will begin to see cosmetic updates, such as a new logo, updates to the header color scheme, and text descriptions replacing icons. Although not all cosmetic changes will be communicated, any changes to functionality will be before being released.

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Desking

- When desking a new Jaguar or new Lincoln deal in Arkansas, Connecticut, Kentucky, Massachusetts, Rhode Island, Virginia, or West Virginia, the Ford Local Fee will now be applied based on the current Ford Local Fee calculations.