November Connect Release Notes

Following are the Connect CRM enhancements and fixes scheduled for release between Oct. 12 - Nov. 8.

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New and Enhanced Features

Reporting & Analytics Platform

Connect Reporting

- Connect users now have the ability to share reports with Field Trainers and Performance Managers (PM). In the **Connect Reporting: My List** section, select next to the report to be shared. To share reports with Field Trainers, select **RAPTraining** or for PMs select **RAPPM**.

Note: Shared reports should be named with a unique name including the Dealer number, to ensure that the reports can be easily found.

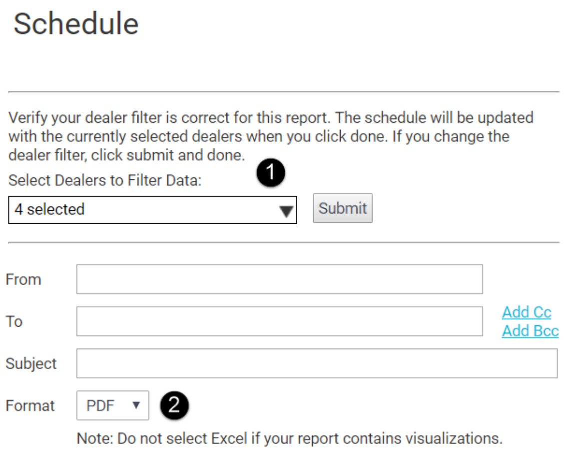
- With the monthly December Connect release we will be retiring the Classic Lead Source ROI report. Contact your Performance Manager to learn how to begin using the new Lead Source ROI report. The new Lead Source ROI report is located on the **Dealer Dashboards** under the **Leads** tab. It can also be added to a **User Dashboard**.

Note: If the **Leads Dashboard** is not in the list of **Dealer Dashboards** or the tab is not available, please contact your administrator for access.

Connect Reporting, Continued

- For dealerships with multiple rooftops, the Connect Reporting Scheduler ( ) pop-up now displays the number of selected dealers 1 to be included in the scheduled email.

Note: If the report contains visualizations (any type of graphic), select PDF as the Format type 2.



New and Enhanced Features

AIS

- To ensure better data matching and consistency across Connect and Desking, all dealers will be slowly updated to the latest version of AIS incentives integration. There will be no change to the current AIS functionality. Dealerships will be updated on a weekly basis between Nov. 14 – Dec. 12. Dealerships will receive an email informing them of when to expect their scheduled update.

  Dealers will be updated according to the following schedule:

  Nov. 14: Dealer numbers 0001-2999
  Nov. 21: Dealer numbers 3000-6999
  Nov. 28: Dealer numbers: 7000-8000
  Dec. 5: Dealer numbers: 8001-9000
  Dec. 12: All remaining dealer numbers

Other Features

- When a global user searches using the Quick Search in Connect, the search will now default to the Advanced Search rather than the Quick Search.
- When re-assigning an Unassigned customer from the **Customer Assignment by rep** page, the customer record will now update the sales rep to reflect the re-assigned sales rep.
- When a user sends an email, the spell check is now properly functioning.
- The **Service Appointments Dashboard** will no longer randomly disable.
- When a user has access to and marks a vehicle **No longer owned?** on a customer record, it will be automatically approved and sent to the **No Longer Owns Log**.