



# eLead CRM Basic Training

ELAND ONE

Welcome Suzuki BDCRep, Mon, Apr 21, 2014

Technical Support (877) 859-0195

First Coast Mercedes-Benz

Home + Add Log Scripts Leads On

Inventory

Prospects

Add Prospect

Add Prospect Wizard

Active

Inactive

Sold

Other

Source

Type

Begin Search

Scan License

Appointments For 4/21/2014

Show	N	Customer	Due	Salesperson	Confirm
	N	Paroni, Rick	10:00 AM	Salesperson, Suzuki	
	N	Redus, Mike	2:30 PM	Carnes, Kevin	
	N	Parker, Geraldine	5:00 PM	Salesperson, Suzuki	

Total Appts: 4 Confirmed: 2 Shown: 1 No Show: 0 Overdue: 1 Appts Sold: 0

First Name:

Last Name:

W-Phone:  850  Ext:

C-Phone:  850

H-Phone:  850

Worksheet:  - Select -

Search

Search Results:

## Add Prospect Wizard

There are two ways to get to the Add Prospect Wizard as highlighted by the yellow arrows.

**Today's Appointments** – All appointments for the dealership are displayed.

**Spinning Triangle** – Appears 4 hours before the scheduled appointment if it has not been confirmed.

- If the customer's name is highlighted, the appointment is overdue.

**Mark in Showroom** - You can mark a customer in the showroom by clicking on the icon of the man.

WELCOME ONE

Welcome Suzuki BDCRep. Mon, Apr 21, 2014

Technical Support (877) 859-0195

First Coast Mercedes-Benz

Cust. Home Add Search DeskLog Scripts Leads On

Letters New Lead Logout

Inventory

Prospects

Add Prospect Wizard

Begin Search

Scan License

First Name:

Last Name:

W-Phone:  850  Ext:

C-Phone:  850

H-Phone:  850

Workshop:  Select

Search

Appointments For 4/21/2014

Show	N/U	Customer	Due	Salesperson	Confirm
<input type="checkbox"/>	N	Paroni, Rick	10:00 AM	Salesperson, Suzuki	<input type="checkbox"/>
<input type="checkbox"/>	N	Redus, Mike	2:30 PM	Carnes, Kevin	<input type="checkbox"/>
<input type="checkbox"/>	U	Parker, Geraldine	5:00 PM	Salesperson, Suzuki	<input type="checkbox"/>

Total Appts: 4 Confirmed: 2 Shown: 1 No Show: 0 Overdue: 1 Appts Sold: 0

Search Results:

\*\* You must hit "Search" if manually typing in customer's name or scanning in driver's license to look for duplicate records.\*\*

## Adding Prospects

- 1. Reverse phone look up.** Enter number, then press the Phone button. eLead will search all 3 phone fields for you.
- 2. eLead Driver's License Scanner.** Will populate all customer's info, including photo, except phone number and email address.
- 3. Manually type in name.**

ELERO ONE Welcome Suzuki BDCRep, Mon, Apr 21, 2014 Technical Support (877) 859-0195 First Coast Mercedes-Benz Letters New Lead Logout

Home Add Search DeskLog Scripts Leads On

Inventory Prospects

Add Prospect Add Prospect Wizard Active Inactive Sold Other Source Type

Add Prospect Wizard

Begin Search Scan License

First Name: Carl  
Last Name: Stewart  
W-Phone: 850 Ext: C-Phone: 850 H-Phone: 850  
Worksheet: - Select - Search

Appointments For 4/21/2014

Show	N/U	Customer	Due	Salesperson	Confirm
N		Paroni, Rick	10:00 AM	Salesperson, Suzuki	
N		Redus, Mike	2:30 PM	Carnes, Kevin	
U		Parker, Geraldine	5:00 PM	Salesperson, Suzuki	
Total Appts: 4		Confirmed: 2	Shown: 1	No Show: 0	Overdue: 1
		Appts Sold: 0			

Search Results:

In Showroom	Match	Name	Home Phone	Primary Rep
	50%	Stewart, Aaron	404-351-3569	Stewart, Suzuki
	50%	Stewart, Armando	334-318-1766	Stewart, Suzuki
	50%	Stewart, Bill	770-818-9200	
	50%	Stewart, Bill	678-662-3287	Fisher, Ellen
	50%	Stewart, Brenda		
	50%	Stewart, Brenda	678-521-7157	
<input type="checkbox"/>	50%	Stewart, Calvin	850-888-0418	BDCRep, Suzuki
	50%	Stewart, Chris		Stewart, Suzuki
<input type="checkbox"/>	50%	Stewart, Cody		Salesperson, Suzuki
	50%	Stewart, Codyz		Stewart, Suzuki
	50%	Stewart, Daniel		Stewart, Suzuki

May have a match. Compare customer records by clicking "More Info" button.

No Match - Add New Sales Customer

Action

More Info New Sales

More Info New Sales

More Info New Sales

More Info New Sales

More Info New Sales

More Info New Sales

More Info Add Me

More Info New Sales

More Info Add Me

More Info New Sales

More Info New Sales


## Adding Prospects (Cont.)

If this is truly a new customer - click "No Match – Add New Customer"

If this is not a new customer and their sales rep is not available - click "Add Me" to view the customer's Opportunity Details Screen and assist without becoming primary rep for customer.


If you are re-upping an existing customer – click "New Sales" button.


## Customer Information


Prefix:  First:  Middle:  Last: \*  

Street 1:  Do Not Mail: ☐ Preferred: ☐

Street 2:

City:  County:  State:  Zip:  

Home #:   Do Not Call: ☐ Preferred: ☐

Cell #:  

Business #:  Ext:  Day  ☐ ☐

Primary Email:  Do Not Email: ☐ ☐

Secondary Email:

Birthday:  Dealer ID:  SSN:

## Vehicle of Interest

VIN:  Mileage:

New/Used:  Stock:

Year:  -Select-  Make:  -Select-

Model:  -Select- Trim:  -Select-

## Trade-In Information

VIN:


Year:  -Select- Make:  -Select-

Trim:  -Select- Transmission:  Automatic

Lender:  Payoff:


Insurance Company:  Policy Number:


## Opportunity Information

Salesperson:  -Select- \* 


BDC Manager:  -Select-

Desk Manager:  -Select-

Type:  -Select- \* 


Source:  -Select- \* 

Status:  New

Date In:  4/21/2014 

Time In:  01 PM  48

Next Activity:

Next Activity Date:  4/22/2014 

Next Activity Time:  01 PM  48

Work Sheet:  -Select-

Time Out:

## Creating a New Opportunity

Only the fields marked with a red asterisk are required. You can add more information as you build a relationship with your customer.

# Creating a New Opportunity- Customer's Address

When entering customer's address, there is no need to enter in city or state.

Enter zip code and click the blue house to the right.


**Add/Edit Prospect**

**Customer Information**

Prefix: First: Middle: Last:\*

Street 1:

Street 2:

City: County: State: Zip: 

Home #: Do Not Call: Preferred:

Choose the correct city and/or county for your customer. This will ensure you have the correct tax rate.


**Add/Edit Prospect**

**Customer Information**

Prefix: First: Middle: Last:\*

Street 1: Do Not Mail: ☐

Street 2:

City: County: State: Zip: 

Home #: Do Not Call: Preferred:

☐ ☐

Cell #:

Business #: Ext:

Primary Email:

City	State	County
DESTIN	FL	OKALOOSA CO <a href="#">Select</a>
SANDESTIN	FL	OKALOOSA CO <a href="#">Select</a>
<a href="#">NONE OF THE ABOVE</a>		

# Creating a New Opportunity – Customer's Email

Add/Edit Prospect

**Customer Information**

Prefix: First: Middle: Last:\*

Carl Stewart

Street 1:

Street 2:

City: County: State: Zip:

DESTIN OKALOOSA CO FL 32541

Home #: Do Not Call: Preferred:

850 Evening

Cell #: Do Not Call: Preferred:

850

Business #: Ext: Do Not Call: Preferred:

850 Day

Primary Email: Do Not Email:

sstewart@eleadcrm.com ✓

Secondary Email: Do Not Email:

university@eleadcrmc.om ✗

Birthday: Dealer ID: SSN:

**Green Check Mark** - You have entered a valid email address.

**Yellow Yield Sign** - The system was unable to validate email address.

**Red "X"** - There is most likely a typographical error.

# Creating a New Opportunity – Vehicle of Interest

**VIN** - Type in full VIN and press tab. The system will populate year, make, model, and trim. You will need to add mileage.

**Stock Number** – Type in stock # and press tab. The system will populate all info including mileage.

**Inventory Search** – Click on “Search” button.

- Ignore **solds**.

- Enter any partial info, click on vehicle of interest, vehicle info will populate including mileage.

**Vehicle of Interest** Search

VIN:

Mileage:

New/Used:

Year:  To:

Model:

Stock:

Make:

Trim:

**Trade-In Information**

VIN:

Mileage:

Year:  Make:  Model:

Trim:  Transmission:  Color:

Search Clear Search

☐ Generic ☒ New ☒ Used ☐ Show Only Sold Vehicles ☒ Ignore Sold Vehicles

Stock #:  VIN #:  Mileage:

Year:  Exterior Color:  MSRP:

Make:  Interior Color:  Price:

Model:  DMS Status:  Invoice:

Model Number:  Location:  Date:  Acquired:

Legend: ☐ Available ☐ Working in eDesk ☐ Sold to Customer ☐ Inbound Trade ☐ Outbound Trade


Matching Vehicles: 0 Column Configuration

Stock #	Year	Make	Model	Trim
---------	------	------	-------	------

**\*\* Make sure you update mileage before the sale.\*\***



# Creating a New Opportunity – Trade In Information

 Trade-In Information

VIN:		Mileage:	
Year:	-Select- ▼	Make:	-Select- ▼
Trim:	-Select- ▼	Transmission:	Automatic ▼
Lender:		Color:	-Select- ▼ [ec
Insurance Company:		Payoff:	
		Payoff Date:	
		Policy Number:	

Add **VIN**, press tab, vehicle info will populate.

You will need to add mileage and any other information you can obtain.

**\*\*MUST have accurate mileage for an accurate appraisal.\*\***

# Creating a New Opportunity – Opportunity Information

Business #:  850  Ext:  Day  ☐ ☐

Primary Email:  Do Not Email: ☐ ☐

Secondary Email:  ☐ ☐

Birthday:  Dealer ID:  SSN:

Year:  -Select- Make:  -Select- Model:  -Select-

Trim:  -Select- Transmission:  Automatic Color:  -Select- [edit]

Lender:  Payoff:  Payoff Date:

Insurance Company:  Policy Number:

## Opportunity Information

Salesperson  Phipps, Erin  \*

BDC Manager  -Select-

Desk Manager  -Select-

Type:  --Select--  \*

Source:  -Select-  \*

Status:  New

Date In:  4/23/2013

Time In:  11 AM  52

Next Activity:

Next Activity Date:  4/24/2013

Next Activity Time:  11 AM  52

Work Sheet:  - Select -

Time Out:

In Showroom ☐ Turned Over ☐ Write Up ☐ Demo ☐

Note:  Buying a car for his son going to LSU.

Save  Cancel

**Sales Team** – your name auto populates

**Notes** - Help build relationship with prospect.

**Up Type** – How the prospect contacted the dealership.

**Source Type** - How prospect heard about dealership.

**Next Activity** – How you will follow up with prospect.


Make sure you **SAVE** all info!!

# Opportunity Details Screen

**Opportunity Details**

[eBrochure](#)
[Email](#)
[Letter](#)
[Phone](#)
[Showroom](#)
[Schedule](#)
[Sales Quote](#)
[Credit App](#)
[5 Liner](#)
[Worksheet](#)
[Add Note](#)
[Print Info](#)
[Merge](#)
[Delete](#)

**CUSTOMER**


 [Scan](#)

Name: Carl Stewart  
Address: 123 Main Street  
DESTIN, FL 32541


Home #:  
Work #:  
Cell #: (850) 888-8888

Preferred Email: No Preferred Email Address  
Birthday:

Available for Call Center: ☒  
Last Modified:





**OPPORTUNITY** [Add Trade In](#)

 Vehicle: Used 2012 Mercedes-Benz GLK-Class Base (A7) GLK350 4dr All-wheel Drive 4MATIC  
WDCGG8HB8CF838190  
Stock #: PCF838190  
Trade:  
Sales Teams: Stewart, Suzuki - Primary Salesperson  
Uptype: Showroom Up  
Source: radio - 92.1  
Date/Time Due: 4/29/2014 11:30:00 AM  
Sales Status: New


In Showroom ☒ TO ☐ Write Up ☐ Demo ☐

[Contacts](#)
[Service](#)
[Relationships](#)
[Ins/Other](#)
[Lifetime Value](#)
[Vehicles](#)
[Audit Trail](#)
[Equity](#)

**Scheduled Contact Activities** [Delete All](#)

Due	Type	Assigned To	Comment	Action
4/29/2014 11:30:00 AM	 Immediate Call	Stewart, S		<a href="#">..</a> <a href="#">Complete</a> <a href="#">Edit</a>
4/29/2014 11:30:00 AM	 Immediate Email	Stewart, S		<a href="#">..</a> <a href="#">Complete</a> <a href="#">Edit</a>

**Completed Opportunity Activity History**

Date Completed	Activity Type	Outcome	Comments	Completed By	Action
4/29/2014 11:30:00 AM	 Showroom Up	Completed	May also get a C-Class.	Stewart, S	<a href="#">View</a>

**Sales Team** – Only Managers can add/remove staff.

**Sales Status** – Managers can make active, inactive, and sold. Salespeople can make active and possibly sold.

**Customer Information** – You can click any of the blue words on left and it will open the customer information edit screen.

# Opportunity Details Screen – eBrochure

Opportunity Details

eBrochure Email Letter Phone Showroom

CUSTOMER

Scan

Name: Carl Stewart  
Address: 123 Main Street  
DESTIN, FL 32541  
Home #:  
Work #:  
Cell #: (850) 888-8888  
Preferred Email: No Preferred Email Address  
Birthday:  
Available for CallCenter: ☒  
Last Modified:

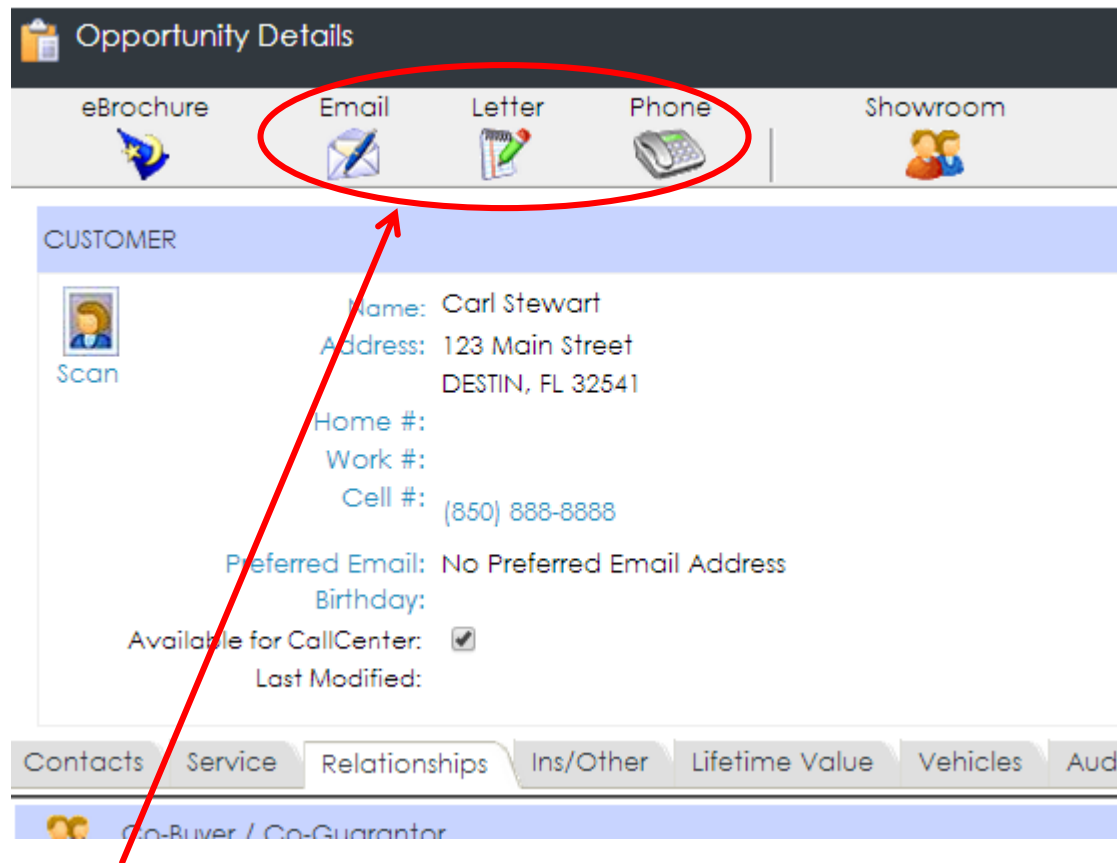
Contacts Service Relationships Ins/Other Lifetime Value Vehicles Audi

Co-Buyer / Co-Guarantor

**eBrochure** – Use to create personalized webpage for a specific vehicle or vehicle of interest.

**\*\* You can send multiple eBrochures and track which vehicle the prospect views. \*\***

## Opportunity Details Screen – Unscheduled Tasks



**Unscheduled Task Icons** – If you perform an unscheduled activity, you can add that activity to the prospect's record by clicking one of the icons.

# Completing Activities - Opportunity Details Screen

**Opportunity Details**

eBrochure Email Letter Phone Showroom Schedule Sales Quote Credit App 5 Liner Worksheet Add Note Print Info Merge Delete

**CUSTOMER**

Name: Carl Stewart  
Address: 123 Main Street  
DESTIN, FL 32541  
Home #:   
Work #:   
Cell #: (850) 888-8888  
Preferred Email: No Preferred Email Address  
Birthday:   
Available for CallCenter: ☒  
Last Modified:

**OPPORTUNITY**

Vehicle: Used 2012 Mercedes-Benz GLK-Class Base (A7) GLK350 4dr All-wheel Drive 4MATIC  
WDCGG8HB8CF838190  
Stock #: PCF838190  
Trade:   
Sales Teams: Stewart, Suzuki - Primary Salesperson  
UpType: Showroom Up  
Source: radio - 92.1  
Date/Time Due: 4/29/2014 11:30:00 AM  
Sales Status: New  
In Showroom ☒ TO ☐ Write Up ☐ Demo ☐

Contacts Service Relationships Ins/Other Lifetime Value Vehicles Audit Trail Equity

Scheduled Contact Activities

Due	Type	Assigned To	Comment	Action
4/29/2014 11:30:00 AM	Immediate Call	Stewart, S		Complete Edit
4/29/2014 11:30:00 AM	Immediate Email	Stewart, S		Complete Edit

Completed Opportunity Activity History

Date Completed	Activity Type	Outcome	Comments	Completed By	Action
4/29/2014 11:30:00 AM	Showroom Up	Completed	May also get a C-Class.	Stewart, S	View

**Process Activity**

Name: Norberto Bollenbach Work Phone: (404) 365-1766 ext: Email: TREYDAVID@NADAdemo.com  
Address: 5106 HEDDON WAY Home Phone: (404) 841-8361 Wanted Vehicle: Used (2015-) Toyota Corolla  
GAINESVILLE, FL 32604 Cell Phone: (404) 434-5548 Trade-In Vehicle: 2005 Mercedes-Benz C-Class

**Current Activity**

Activity: Immediate Email ☒ Be Back  
Completed By: Dominick, Salesperson  
Completed At: 09/16/2015  
Status: Working

☐ In Showroom ☐ Turned Over ☐ Write Up ☐ Demo ☐ Appraisal

Comments:

Change Current Activity

**Next Activity**

Activity: Email #2  
Due: 9/17/2015 10:20 AM  
Assign To: Dominick, Salesperson

Comments:

Send Email

**Complete Button** – Process Activity Screen  
**Edit Button** – Change Current Task Screen


**Change Current Task**

Current Task: Immediate Email Created By:   
Switch Current Task To: -- Select --  
Assign Current Task To: Salesperson Dominick  
Due: 09/03/2015 Hrs: 09 Min: 15 AM/PM: AM  
Comments:



Save

# Opportunity Details Screen – Opportunity Tabs


CUSTOMER






Name: Carl Stewart  
Address: 123 Main Street  
DESTIN, FL 32541  
Home #:  
Work #:  
Cell #: (850) 888-8888  
Preferred Email: No Preferred Email Address  
Birthday:  
Available for CallCenter: ☒  
Last Modified:

OPPO



Contacts Service Relationships **Ins/Other** Lifetime Value Vehicles Audit Trail Equity

	Co-Buyer / Co-Guarantor
Relationship	Name
CoBuyer	Stewart, Jazz
	Referral
Relationship	Name
	Households
Relationship	Name
Child	Stewart, Cody

**Service Tab** – Service done by date.

**Relationships Tab** – Add Co-Buyer, Referrals, Household Members

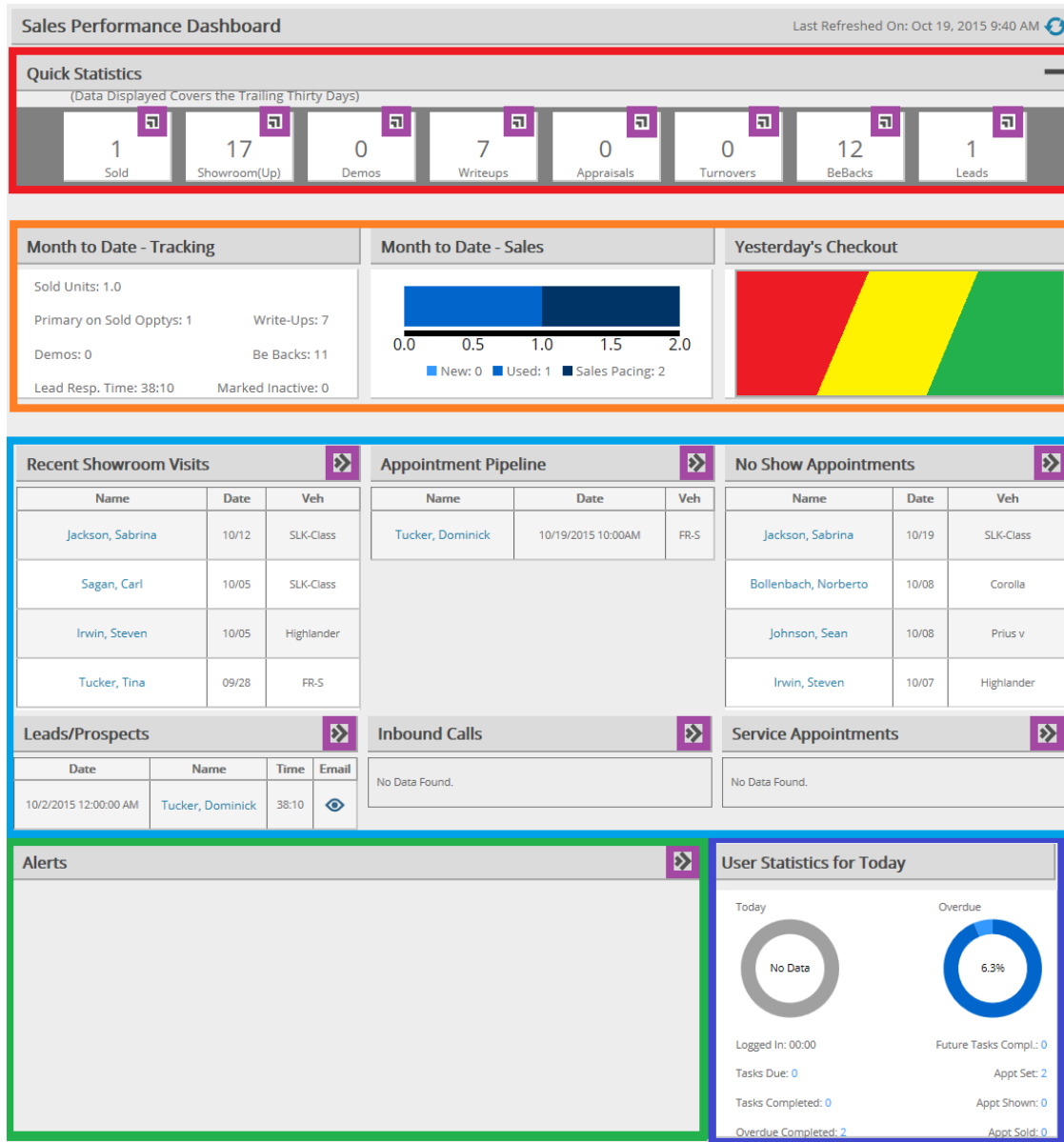
**Ins/Other** – Any additional information about the customer.

**Lifetime Value Tab** - Sales and itemized Service history for customer

**Vehicles Tab** – Displays vehicles owned, what has been serviced and vehicles they have traded.

**Audit Trail** – Records any changes that were made to the customer record and who made them.

# Sales Performance Dashboards



## Quick Stats

- This section contains various showroom statistics, including Sold, Showroom ups, and sales steps.

## Performance Tracking

- This section contains performance tracking statistics, including a red/yellow/green grade on yesterday's performance.

## Customer Statistics

- This shows customer statistics, including recent visits, appointments, leads and customers coming in for service.

## Alerts

- This section shows vehicle and equity alerts.

## User Statistics

- This shows eLead use statistics, including time logged in, tasks due and overdue and appointments.

## Drill Down

- All arrows associated with various statistics take you to a drill down report for that statistic.



# Organizer

WELCOME ONE

Welcome Suzuki Salesperson, Tue, Apr 29, 2014

Cust. [Search] Home + Add [Search] Scripts Leads On

Inventory

Prospects

Organizer

Daily  
Weekly  
Monthly  
Over Due

April 2014

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
WEEK 1	30	31	1	2	3	4	5
WEEK 2	6	7	8	9	10	11	12
WEEK 3	13	14	15	16	17	18	19
WEEK 4	20	21	22	23	24	25	26
WEEK 5	27	28	29	30	1	2	3
WEEK 6	4	5	6	7	8	9	10

Dashboards

Get to organizer by clicking "**Organizer**" on the left menu bar.

Can view by **Daily**, **Weekly**, **Monthly**, and **Overdue Activities**

You can also view **Daily Activities** by clicking on any day within the **calendar**.

**Overdue Activities** will show you overdue activities up to two weeks back.

# Completing Activities – Organizer

Print Page

Print

Organizer for: Salesperson Dominick

Show:
All

Status:
Open

Print 0 letters

Friday, October 9, 2015

Time	Due	Customer	Contact Due	Vehicle	Assigned To	Action
Before 9:00 AM	8:00 AM	Irwin, Steven Day: Eve:(877)859-0195 Cell:	NS Phone Follow Up	2012 Toyota Highlander	Dominick, Salesperson	Complete  Edit Oct 5 2015 2:48PM:buying a car for his daughter going to LSU
	8:30 AM	Bish, Bradley Day: Eve: Cell:(877)859-0195	Phone Follow Up	2015 Toyota Camry	Dominick, Salesperson	Complete  Edit Oct 14 2015 4:40PM:Mgr review bought elsewhere
9:00 AM						
10:00 AM	10:00 AM	Bollenbach, Norberto Day:(404)365-1766 Eve:(404)841-8361 Cell:(404)434-5548	Send Email	2015 Mercedes-Benz GLK-Class	Dominick, Salesperson	Complete  Edit Oct 8 2015 8:36AM:rescheduled from yesterday
	10:00 AM	Casselberry, Ryan Day: Eve:(850)777-0309 Cell:	Appointment	2015 Mercedes-Benz SLK-Class	Dominick, Salesperson	Complete  Edit Sep 14 2015 9:08AM:notes for current activity (Left Message)(Day Number)
11:00 AM						

Activities can be **completed** or **edited** right from the Organizer.

**Process Activity**

Name: Norberto Bollenbach  
Address: 5106 HEDDON WAY  
GAINESVILLE, FL 32604

Work Phone: (404) 365-1766 ext:  
Home Phone: (404) 841-8361  
Cell Phone: (404) 434-5548

Email: TREYDAVID@NADAdemo.com  
Wanted Vehicle: Used (2015-) Toyota Corolla  
Trade-In Vehicle: 2005 Mercedes-Benz C-Class

**Current Activity**

Activity: [Immediate Email](#) ☒ Be Back  
Completed By: [Dominick, Salesperson](#)  
Completed At: [09/16/2015](#)  
Status: [Working](#)  
☐ In Showroom ☐ Turned Over ☐ Write Up ☐ Demo ☐ Appraisal  
Comments:

**Next Activity**

Activity: [Email #2](#)  
Due: [9/17/2015](#)  
Time: [10](#):[20](#) [AM](#)  
Assign To: [Dominick, Salesperson](#)  
Comments:

[Change Current Activity](#)
[Send Email](#)

**Change Current Task**

Current Task: **Immediate Email**
Created By:

Switch Current Task To: [-- Select --](#)  
Assign Current Task To: [Salesperson Dominick](#)  
Due: [09/03/2015](#) Hrs: [09](#) Min: [15](#) AM/PM: [AM](#)  
Comments:

[Save](#)

# Preferences

Preferences Menu, Monday, November 2, 2015

Set preferences

Choose Row Color:

In Showroom

- Elead Today
- Prospects
- Monthly View Organizer
- ELEAD CRM Splash**
- Add Prospect Wizard
- Who's Logged In Dashboard
- eSales Agent Dashboard
- eSales Manager Dashboard
- Daily View Organizer
- Motivator Dashboard

Sold:

Left Showroom:

Over 45 Min:

Landing Page  
Menu Style

Landing Page

- The is your "Home Page" for the CRM.

Email Signature

☐ Always include my email signature in emails

Select a Merge Code..

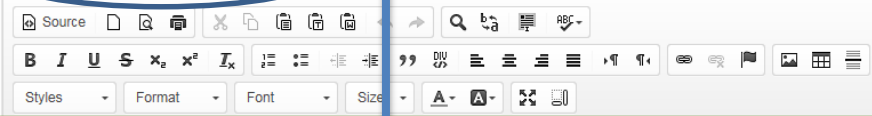
Insert

File Operations:



Insert Image

Check Spelling



Thank you,

Internet Stewart  
Internet Sales Rep  
<{DealershipName}>  
<{DealershipPhone}>



Signature

- This is your signature for emails sent from the CRM.

Application Settings

Management Escalation Contact Email Type:

☐ Work ☐ Personal ☐ Notification Address

Credit Application Contact Email Type:

☐ Work ☐ Personal ☐ Notification Address

Skate Contact Email Type:

☐ Work ☐ Personal ☐ Notification Address

Read Receipt Notification Email Type:

☐ Work ☐ Personal ☐ Notification Address

SMS Notification Email Type:

☐ Work ☐ Personal ☐ Notification Address

Update

Main Menu

Don't forget to click Update to save changes

# Contact Us

Technical Support (877) 859-0195

First Coast Mercedes-Benz

Letters Logout

Scan License

Appointments For 12/16/2014

Show	N/U	Customer	Due	Salesperson	Confirm
	N	Hutto, Iris	2:30 PM	Carnes, Kevin	<input checked="" type="checkbox"/>
	N	Giardina, Jason	4:00 PM	Salesperson, Suzuki	<input type="checkbox"/>
Total Appts: 3		Confirmed: 2	Shown: 1	No Show: 0	Overdue: 0
				Appts Sold: 0	

- Technical Support number is always at top, right on main eLead screen.
- Also, you can reach the Elead University Team Via the Contact Us section of the University.

Contact Us

Your Email

university@eleadcrm.com

Message

Send