

How to un-wind a CRM Sold deal:

1. Click on Prospects
2. Click on Sold
3. Locate customer (you may have to change date range at top of page)

Sold Prospects New 08/18/2015 08/25/2015

Letters E-M

Subject: Template:

<input type="checkbox"/>	Name	Date Sold	Phone
<input type="checkbox"/>	Richardson, Lovell	8/21/2015	(850)111-0925
<input type="checkbox"/>	Wickersham, Clay	8/20/2015	(850)888-0924
<input type="checkbox"/>	Woodring, Michael	8/18/2015	(850)222-0923
<input type="checkbox"/>	Worrell, Cliff	8/25/2015	(850)888-0929

Prospects

- Add Prospect
- Call Tracking
- Add Prospect Wizard
- Active >
- Inactive >
- Sold ←
- Other >
- Imported Lists >
- Source >
- Type >

4. Select the un-wind icon to the very right of the customer's name

Source

newspaper	
Getauto.com	
radio	
Getauto.com	

OR

1. Click on Reports
2. Click on Specialist tools
3. Click on eLead Confirm Sales Report

Report

- Daily Ups
- Deal Profit
- Deleted Customers by Date Range
- ELEAD CRM Confirm Sales ←
- Phone & Email Penetration

4. Locate customer
5. Select unwind icon to far right of customer's name

Reports

- All
- Favorites
- Activity
- Auto Pilot
- BDC
- Campaign Manager
- Core Performance
- Daily
- ELEAD Desking
- ELEAD RETAIL
- Internet Lead
- Service
- Specialist Tools ←
- Virtual BDC

Photo	Name	Date	Vehicle	Stock #	RMF ID	Gender	Salesperson	Unwind
<input type="checkbox"/>	Gordon, Derek	8/4/2015	1999 Ford Thunderbird	FA122211		S	Sekarsam, Suzy	
<input type="checkbox"/>	Bump, Diane	8/11/2015	2015 Mercedes Benz GLS Class	FA104134		S	Sekarsam, Suzy	
<input type="checkbox"/>	Conroy, Stephanie	8/6/2015	2015 Mercedes-Benz S-Class	FA187612		F	Carroll, Kevin	
<input type="checkbox"/>	Osborn, Fran	8/5/2015	1985 Ford Thunderbird	FA125571		I	Carroll, Kevin	
<input type="checkbox"/>	Han Veterinary Clinic, Dr. Nichole Ham	8/10/2015	1990 Nissan Sentra	WC100288		S	Sekarsam, Suzy	
<input type="checkbox"/>	Hughes, Herbert	8/12/2015	2015 Mercedes-Benz C-Class	FA001188		S	Sekarsam, Suzy	
<input type="checkbox"/>	Loc, Brandon	8/25/2015	2012 Nissan Armada	7N190278		S	Sekarsam, Suzy	
<input type="checkbox"/>	Moss, Renee	8/27/2015	2015 Mercedes-Benz S-Class	FA187612		F	Sekarsam, Suzy	
<input type="checkbox"/>	Richardson, Lovell	8/21/2015	1986 Mercury Mystique	WQ007881		S	Sekarsam, Suzy	
<input type="checkbox"/>	SHAW, Greg	8/19/2015	1997 Toyota Camry	VJ179268		I	Carroll, Kevin	
<input type="checkbox"/>	Wickersham, Clay	8/20/2015	2015 Mercedes-Benz C-Class	FA187612		I	Carroll, Kevin	
<input type="checkbox"/>	Wilkins, Mark	8/14/2015	1988 Toyota Corolla	WQ074716		S	Sekarsam, Suzy	
<input type="checkbox"/>	Woodring, Michael	8/18/2015	2015 Mercedes-Benz C-Class	FA187612		F	Sekarsam, Suzy	
<input type="checkbox"/>	Worrell, Cliff	8/25/2015	2015 Mercedes-Benz S-Class	FA187612		I	Carroll, Kevin	

** Please note that we do NOT unwind DMS sold deals without a DMS screen shot showing the vehicle is available and 'In Stock.'