Customer Retention Management (CRM)

Manager's Quick Start Guide

1 *Edit Display of DMS Salesperson Name*

This tool modifies the DMS Salesman information from the DMS download into a displayable format for use in the dealership's letter, phone, and email templates. To edit the DMS salesperson name, open the *Settings* tab, then click the *Edit Display of DMS Salesperson Name* link. Use the list box to select the name of the rep to modify, then click *Submit*. In the *Change Display Name* to box enter the name as it should appear in the CRM templates.

1. Select the name of the sales rep to be modified from the *Current Name Display* drop down list by clicking the down arrow to display the list of names and then selecting the name from the list. Then click *Submit* to continue.

2. Enter the name, as it should be displayed, in the Change *Display Name to* text box.

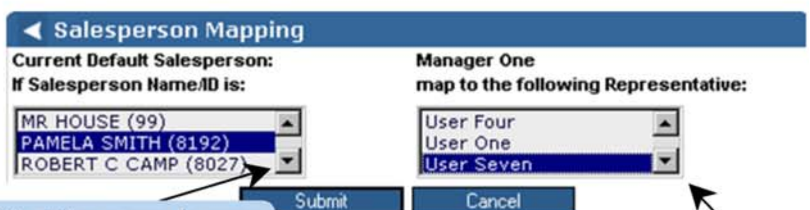
3. Click the *Submit* button to save and update the settings.

2 *Map DMS Salesperson to Current User*

Salesperson mapping allows manager's to "map" the name/id of a salesperson no longer with the dealership to a current user in the Web Control® system. This can be useful in assigning *Daily Work Plans* to existing representatives. Please note that this mapping does not remove or replace the original salesperson information on record, therefore reporting will not be effected.

When first logging onto the CRM system to map DMS sales reps, the system will prompt you to select a default salesperson, if no other salesperson is mapped this is the salesperson to which the mapping function will default. To reset the default DMS salesperson, delete the current default salesperson and select a replacement.

To map a DMS salesperson name to a sales representative, open the *Settings* tab on the CRM navigation bar, Under *User Administration* click the link to *Map DMS Salesperson to Current User.* From the *If Salesperson Name/ID is* list select the name to be mapped, from the *Map to the Following Representative* list select the rep to which the name will be mapped. Click *Submit* to save the setting.

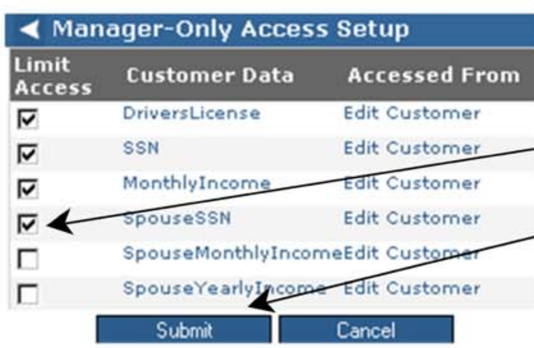


Select the name to map from the *If Salesperson Name/ID is* list.

Select the rep to which the name will be mapped, then click *Submit* to save the mapping.

3 *Manager Access Settings*

The Manage Access tool allows managers the option to limit access of sensitive customer data so that it is only viewable to managers. To restrict access to data elements that should only be available to managers, open the *Settings* page, then click the *Manager Access Settings* link under *User Administration*. Check the boxes corresponding to the items to be restricted. Click the *Submit* button to update and save the changes.



Restrict fields by checking the corresponding boxes.

Click *Submit* to update and activate restrictions.