

ISM Quick Start – Auto Manage

The Auto Manager function allows a manager to control where email leads are directed by the Web Control Internet Sales Management (ISM) system. Instead of the manager receiving all the mail and having to manually forward it, auto manager sorts and redirects the email to the preferred Users based on criteria specified by the manager. Only the main manager, the one having the sales@dealername.dealerspace.com email address in their account, should have Auto Manager configured. (Identified in Settings/Email Administration/List Dealer Email Accounts.) The System will not recognize an auto manager configured for additional Users.

Prospects	Organizer	Reports	Settings	Help			
< Current Ema	il Accounts for	AVV Honda				Back	
Ema Rene	Email Account Rene Hanada		Source				
james@avvhonda.dealerspace.com		Personal Email			2		
sales	sales@infinitidemo.dealerspace.com		Infiniti D License Scan Nissan D				

Multiple email filters may be configured. The location of the filter in the list will decide the order of importance of the filter. The top filter is the first extracted, the rest of the filters are extracted in order until the last in the list of filters is extracted. The filters must be arranged by the manager in order of importance.

Business hours and individual User schedules must also be configured. The system checks the User's schedule before assigning leads to them.

Configure / Edit Filters

To configure or edit an Auto Manager filter:

- 1. Click "Settings" at the top of the Web Control page.
- 2. Scroll down the Settings list to System Administration.
- 3. **Select** "Auto Manager" from the Settings listing. The Select Manager page appears.
- From the "Select a manager" drop down list on the "Auto Manager" screen, **select** the main sales manager on the system.



The Auto Manager Setup page with existing filters and new filter options appears.

< Auto Manager Set	up for Rene Hanada		B	90
III I ande Where Course t	- Found To AutoTundou Code		Edit	
II reads where source I	Delete			
	Add New Filter For Auto	o Manager		
All Leads Where:	Is Equal To:	Perform:	On User(s):	
elect Criteria ny takes fear tock Number tip Code source Time Frame Unterner Tune		Redirect © To: © Round Robin: ○	AVV Honda Ashley Parker Ernst Wehausen Ernst Wehausen Fred Priest Jorden Smith May Nanbancha Peggy Russel Bene Hanada	and the second s

- To <u>edit</u> an existing filter, click the corresponding "Edit" button. The selected filter will display on the "Edit Auto Manager Filter" screen. Modify the filter, then click "Submit".
- To <u>create</u> a new filter, **select** the criteria for the new filter at the bottom of the "Auto Manager Set Up" screen.

For Assistance contact AVV Technical Support at 614-839-7888 or send an email to ismsupport@avv.com

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- Select one of the options under "All Leads Where:". Depending on the selection, there may or may not be subcategories and options to choose from in the "is equal to" selection box.
- Select one of the options in "is equal to". Hold down the Ctrl key while clicking multiple choices to select more than one option. Additional subcategories and options may be displayed based on your selections. Choose those that best fit your filter intentions.
- 7. **Select** a "perform":option.
 - **Click** the button corresponding to "Redirect to" to simply move the leads to another user.
 - **Select** "Round Robin" to have the leads evenly distributed between two or more users.

Note: The scheduled days off settings will affect the round robins and redirects. If a user is scheduled off, the lead will be forwarded to that user's scheduled back up.

- Click the user(s) to be selected for this filter from the "on user(s)" scroll box, To select multiple users, hold down the Ctrl key on the keyboard while clicking the users from the list. Multiple users are an option only for round robin, redirect applies to a single user.
- 9. **Click** "Submit" to save and activate the auto manager filter. **Click** "Cancel" to return to the settings menu without saving the filter or edits.

Filter Order

If there is more than one filter in the Auto Manager, arrows will appear on the left side of each filter. The location of the filter in the list will decide the order of importance of the filter. The top filter is the first extracted, the rest of the filters are extracted in order until the last in the list of filters is extracted.

If the possibility exists that multiple filters will apply to individual leads, place the filters in order of importance with the most important filter listed first. Each filter can also be edited or deleted by clicking the "Edit" or "Delete" button.

Auto !	Manager Setup for Rene Hanada		Back
	All Leads Where Source Is Equal To AutoTrader Redirect To Ashley	Edit	1
	Parker.	Delete	(
	All Leads Where Year is Equal To CurrentYear Round Robin On User(s)	Edit	í
	Jordan Smith, Peggy Russel, Ernst Wehausen.	Dalets	i.
	All Leads Where Year Is Equal To Previous years Round Robin On User (s)Fred Priest, Sheldon Royston, May Nanbancha.	Edit	í
		Delete	1

Click the arrows to move the position of the filter up and down in the list.

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