

Mobile CRM

Pilot Documentation


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About Mobile CRM

CRM by DealerSocket is a new mobile CRM app that is the successor to DealerSocket Sales. The new CRM app improves on stability and user interface, while retaining much of DealerSocket Sales' functionality.

Opps

The **Opps** page  is the home page of CRM by DealerSocket. By default, the page shows the 20 most recently viewed customers below a Search bar. Tapping **Filters** allows you to sort the Opps page using the same filters as the Opportunities page in desktop CRM, allowing you to use this page to navigate to customer records, sales opportunities, service opportunities, and to-dos.

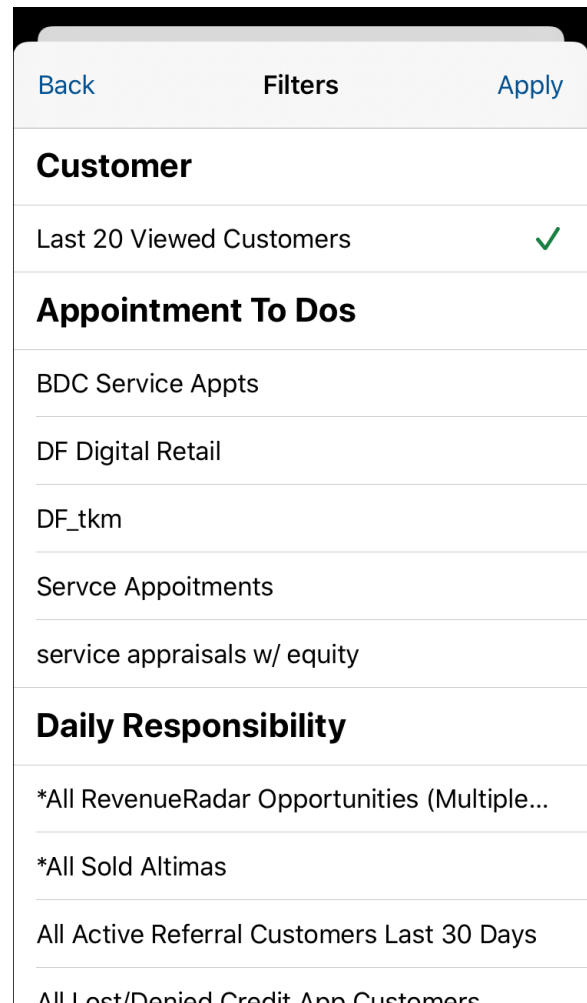
To choose a new filter, tap on the filter and then tap **Apply**. The chosen filter shows a **green check** icon  to confirm this is the filter that will be applied to the page.

From the Opps page, you can navigate to opportunities in several ways. When filtering the page by an opportunity filter, tapping any opportunity opens it. Alternately, you can open a customer record and either open an existing opportunity listed on the page, or create a new opportunity.

The Sales Opportunity page is broken into several sections:

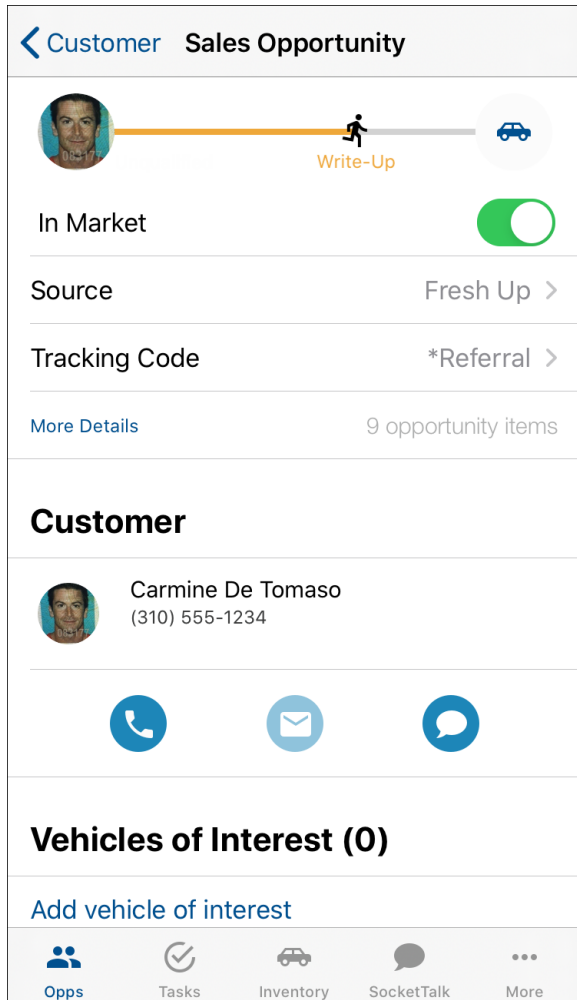
- Sales Opportunity details
- Customer details
- Vehicle of Interest
- Trades
- Activities
- Actions

When viewing opportunities, you can only edit the fields that you have the permission to edit in desktop CRM.



Sales Opportunity Details

The Sales Opportunities Details section allows you to change the opportunity status, source, tracking code, and other information about the opportunity itself.






To change the opportunity status, click the running man progress bar. This opens a list of opportunity status types. Tap one of the statuses to choose it, which puts a **green check** icon ✓ by the status. Tap **Save**.

To put the customer in not-in-market status, toggle the **In Market** switch off . A prompt appears to choose a reason why the customer is no longer in market. Choose a reason and tap **Save**.

Tap **More Details** to view all details that can be altered in this section. You can alter any of these details by tapping on it and choosing from the list that opens.

Customer

The Customer section gives options to call , email , or text  the customer by tapping on the communication icons. If the icon is faded, this means the customer record does not contain that type of communication information, or the customer has opted out of receiving that type of communication.

Vehicles of Interest

Vehicles of interest for the opportunity appear in this section, with the customer's top choice appearing first when there are multiple vehicles listed. You can easily change the top choice by swiping left on the vehicle that should be the new top choice.

To add a new vehicle of interest, tap **Add vehicle of interest**. This opens an inventory search page. You can search for inventory using the elastic search bar, or you can add a vehicle of interest by using the VIN scanner on the vehicle's VIN barcode.

Trades

Trades for the opportunity appear in this section. To add a new trade, tap **Add trade** and add vehicle information manually or by using the VIN scanner on the vehicle's VIN barcode.

Add additional information manually, such as **Odometer** mileage, **Payoff** left on the existing vehicle loan, and **Amount** of trade-in value. Tap the **Existing VSC** switch on if the vehicle has a vehicle service contract.

Activities

The Activities section records the sales checklist, work notes, and tasks associated with the opportunity. A number for each group shows how many items exist in that group.

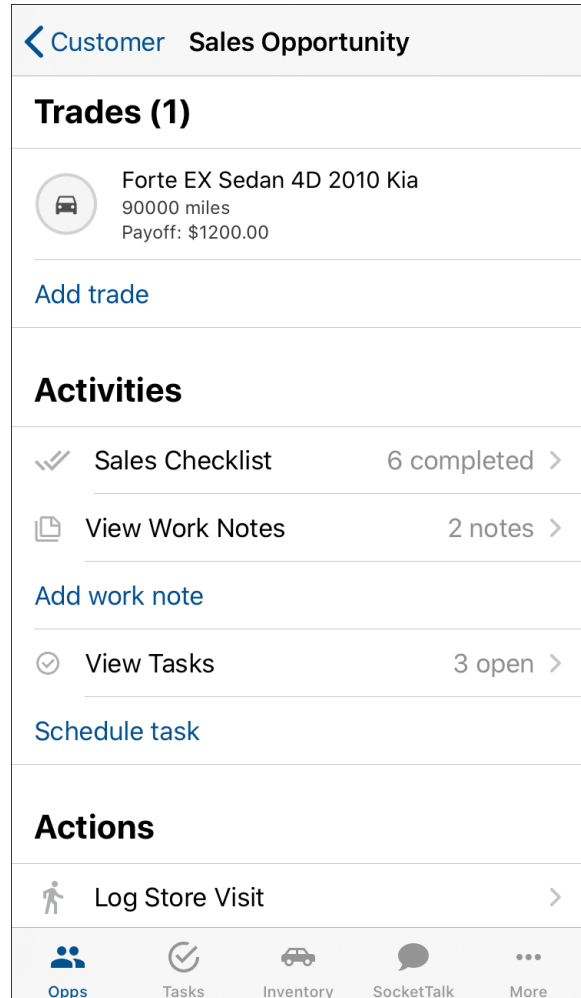
Tap **View Work Notes** to open a page that lists existing work notes. On this page, tap a work note to read it in full detail. To add a work note, tap the **add** icon **+** in the upper right corner. Type the work note and tap **Save**.

Tap **View Tasks** to open a page that lists open tasks and task history. Tap any open task to open the details for the task. To close the task, resolve the prompt in **red text** and tap **Complete This Task**. Some task types can be closed without making edits to the task page.

To add a new task, tap **Schedule Task**. On the Schedule Task page, choose the Assigned to, type, due date, and add any helpful comments. Tap **Save** to complete adding the task.


Actions

The Actions section allows you to log a store visit, phone call or other task, or to push to DMS.




[Customer](#) Sales Opportunity


Trades (1)

 Forte EX Sedan 4D 2010 Kia
90000 miles
Payoff: \$1200.00


[Add trade](#)

Activities

 Sales Checklist 6 completed [>](#)


 View Work Notes 2 notes [>](#)

[Add work note](#)

 View Tasks 3 open [>](#)

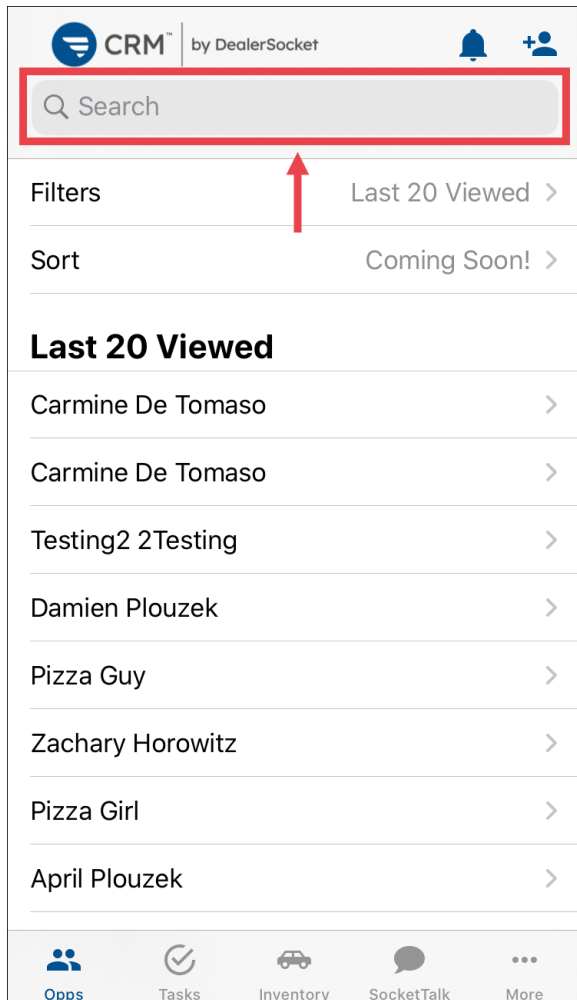
[Schedule task](#)

Actions


 Log Store Visit [>](#)

[Opps](#) [Tasks](#) [Inventory](#) [SocketTalk](#) [More](#)

Searching for Customers




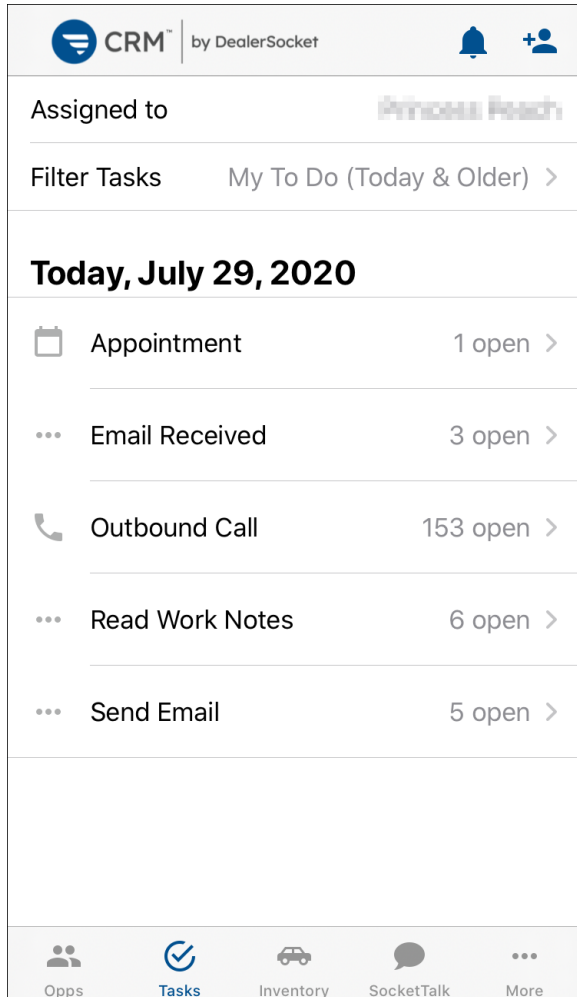
For customers who do not appear in the Last 20 Viewed list, the search is the best way to pull up their customer record. This is faster than searching through the list of opportunities, and it is especially helpful for managers who are likely looking for customers who are assigned to someone other than themselves.


The search bar appears at the top of the **Opps page** . Tap the Search bar and begin typing to begin an elastic search.

Elastic search pulls results for partially completed words. For example, searching for *mic bar* immediately pulls results for any customer name that contains the characters *mic bar*, including *Michael Barr*, *Michael Barnes*, and *Michelle Bartos*. Further down in the search results, customers appear who only partially match *mic bar*, such as *Mike Barr* or *Misty Bartlett*.

Tasks

The **Tasks** page  shows Tasks using the same filters as the Tasks page in desktop CRM. Task categories appear with a number to indicate how many tasks appear for each group.




Tap Filter Tasks to open a list of filters to choose from. To choose a new filter, tap on the filter and then tap **Apply**. The chosen filter shows a **green check** icon  to confirm this is the filter that will be applied to the page.

Tap a task category to open a list of tasks in that group. On the task category page, overdue tasks appear with a red circle around the task icon.


Tap any open task to open the details for the task. To close the task, resolve the prompt in **red text**, if necessary, and tap **Complete This Task**. Some task types can be closed without making edits to the task page.

Inventory

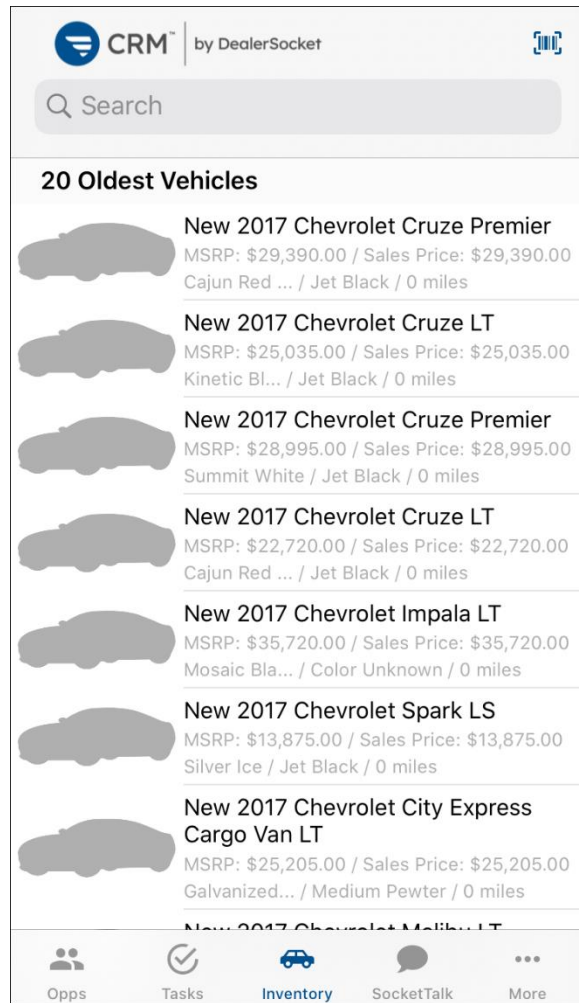
By default, the **Inventory** page  lists the 20 oldest vehicles on the lot.

You can search for vehicles in the dealership inventory using the elastic search bar.


Elastic search pulls results for partially completed words. For example, searching for *cam* immediately pulls results for any vehicle name that contains the characters *cam*, including Camrys, Camaros, and El Caminos. Further down in the search results, vehicles that loosely match the search terms appear, such as vehicles with exterior color Camellia Red Pearl.

You can also find a vehicle using the VIN Scanner on the vehicle's VIN barcode. Tap the **scanner** icon  to open the VIN Scanner and use the device's camera to scan the VIN barcode.

Tap any vehicle to open the vehicle details page. From this page, you can edit vehicle details or add a sales opportunity with the vehicle as the opportunity vehicle of interest.







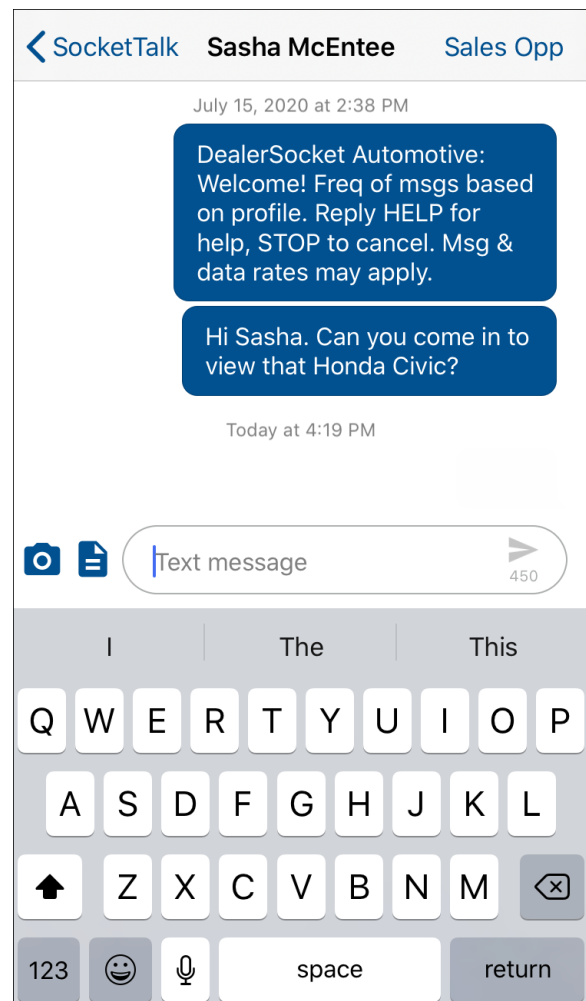
SocketTalk

The **SocketTalk** page  displays SocketTalk text conversations with customers. From here, you can view all incoming messages, or open conversations to continue them. The Search field at the top of the page filters the Recent Conversations list, to easily locate specific conversations.


Note: New SocketTalk conversations cannot be initiated from this page—they must begin from a Sales Opportunity.

Tap any conversation to open it. With a conversation open, you have many options:

- Tap **Sales Opp** to open the sales opportunity associated with the conversation.
- Type in the **text message** field to write a new message. You have 450 characters for each message. As you type, the counter in the field reduces to let you know how many characters you have left. Tap the **send icon**  to send the message.
- Tap the **camera icon**  to send a photo through SocketTalk. You can choose a photo from your device's gallery or open the camera to take a new photo.
- Tap the **template icon**  to browse templates. Tap on a template to load it into the text message field. Tap the send icon  to send the message.

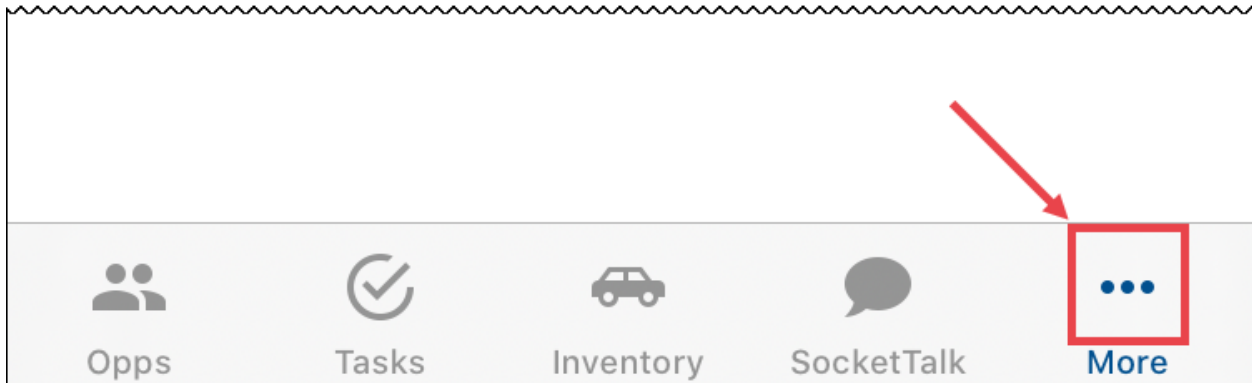


Notification Settings

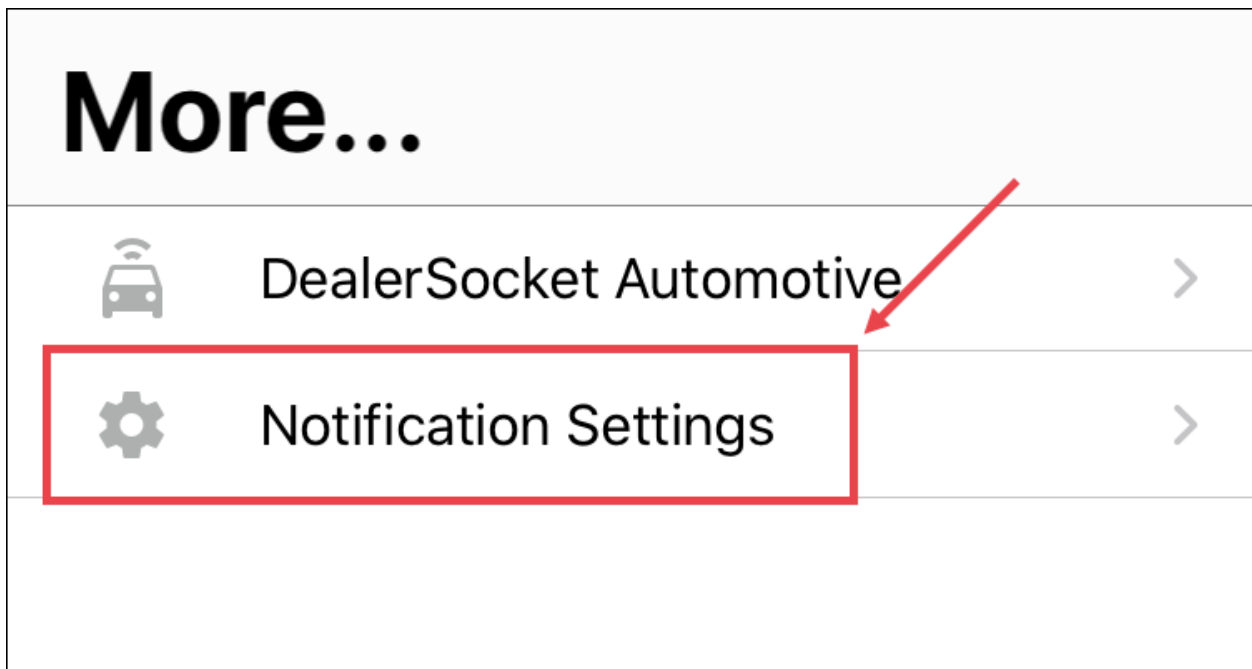
Notifications for CRM by DealerSocket are managed on two levels. In the app, you can choose which notifications you want to receive from the **More** page . You can customize how those notifications appear by using the native settings for your device.

To manage notification subscriptions



1. Tap the **More icon** .



2. On the More page, tap **Notification Settings** .

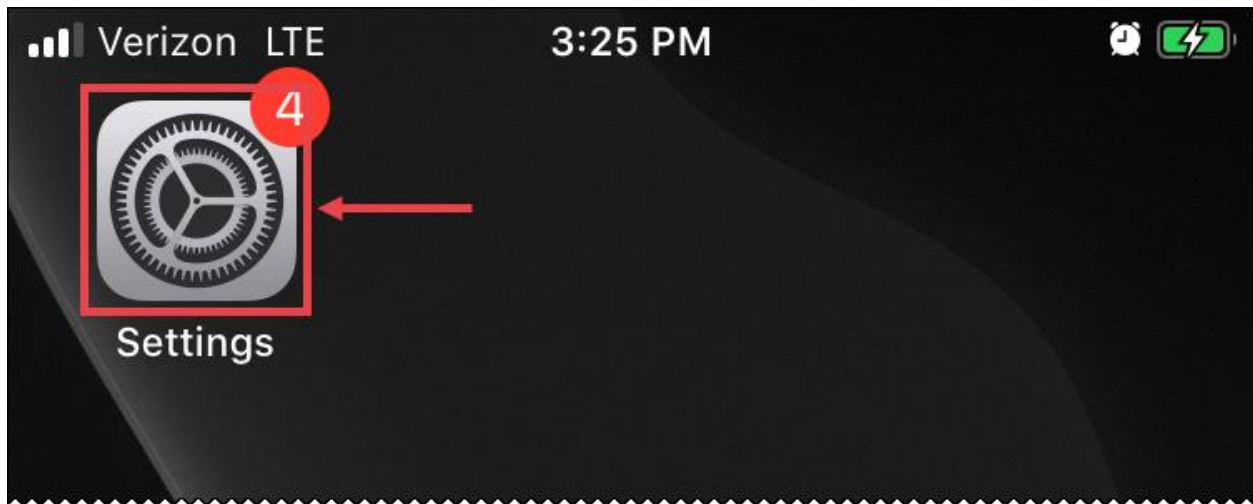


A list of notification types appears.

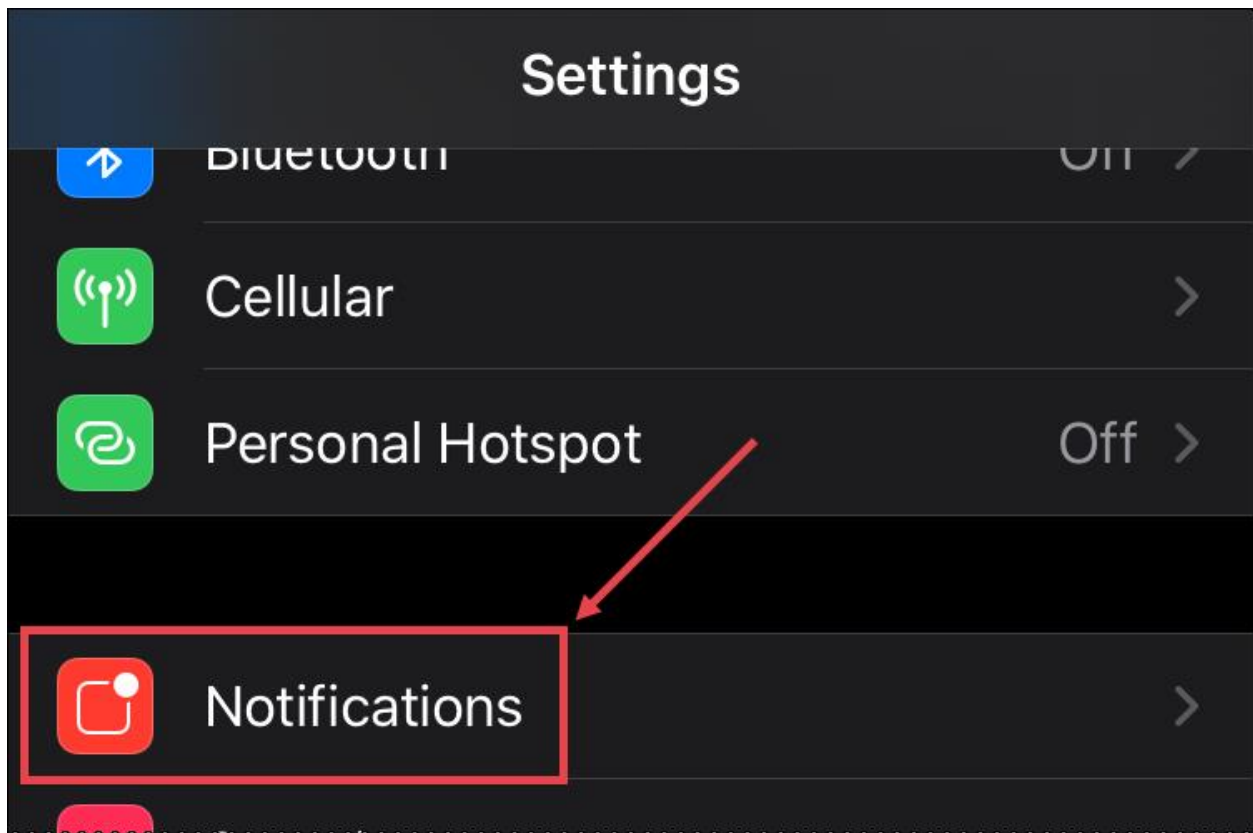
3. Toggle the **switch on**  for notifications you want, and toggle the **switch off**  for notifications you don't want.


To customize native notifications (iOS)

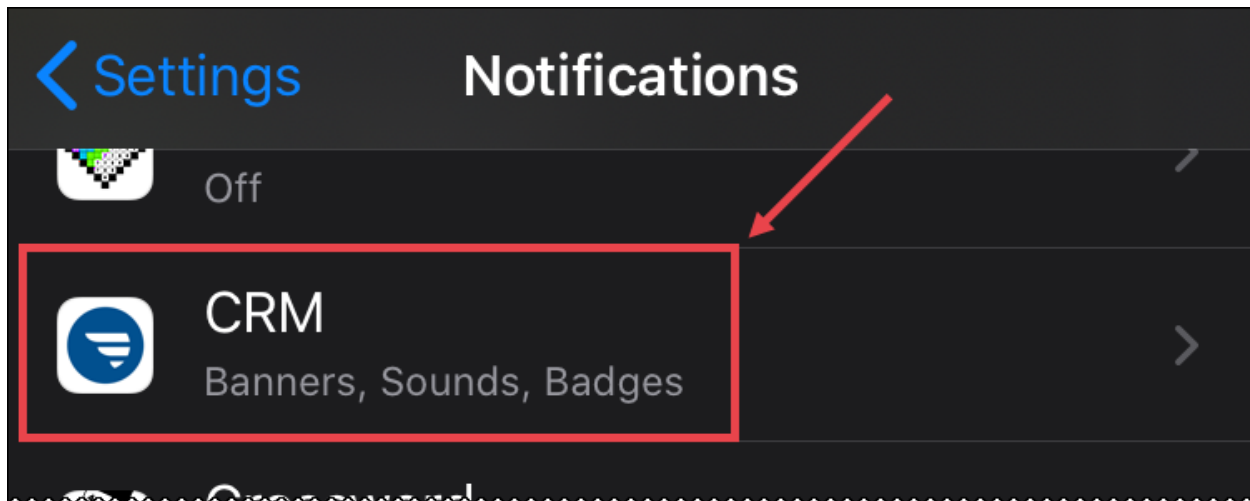
1. On your iOS device, tap **Settings** .



2. In the Settings page, tap **Notifications**.

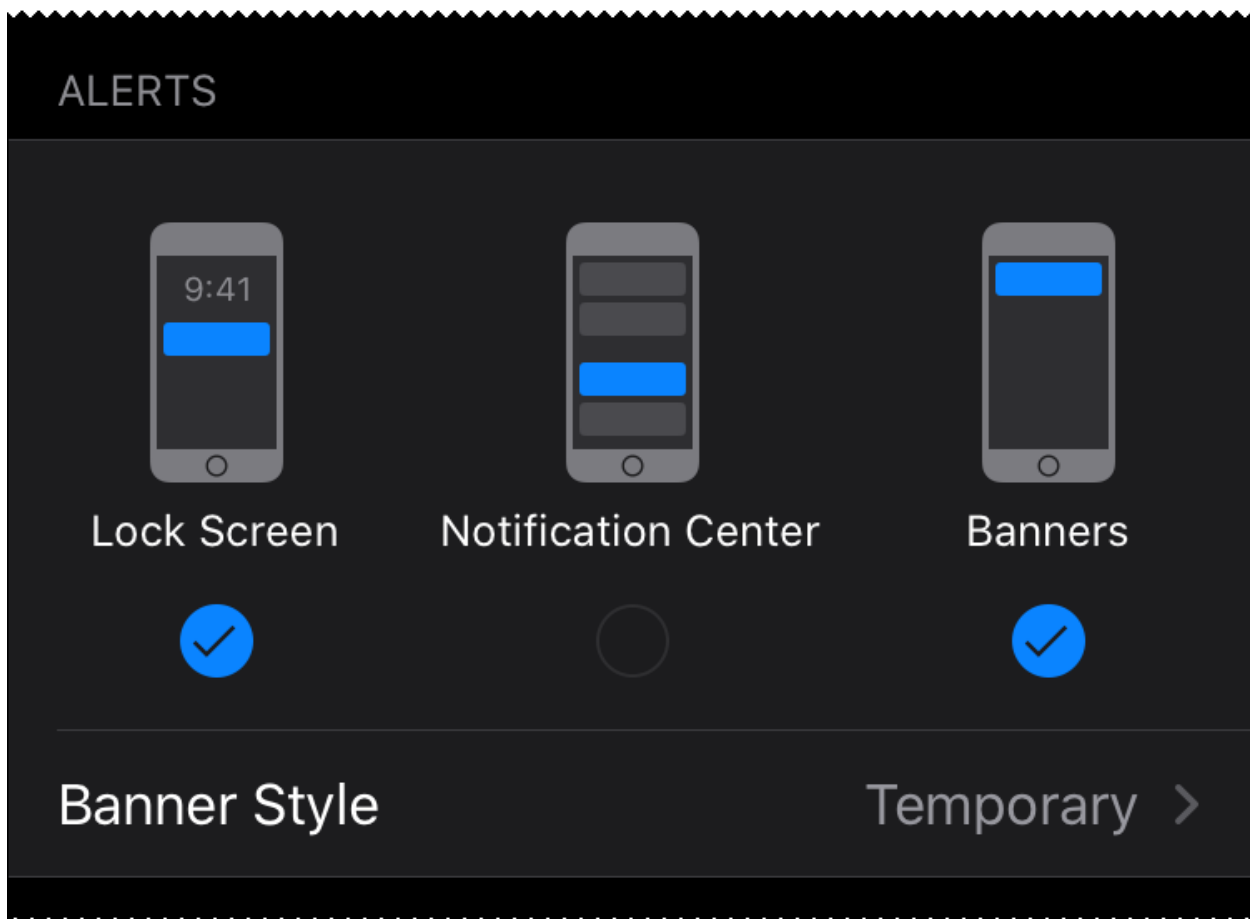


3. Scroll through the list of apps and tap **CRM** .







The notifications page appears.


4. In the Alerts section, **check** the ways you want notifications to appear and the others.



- **Lock Screen:** Notifications pop up when the device screen is locked.

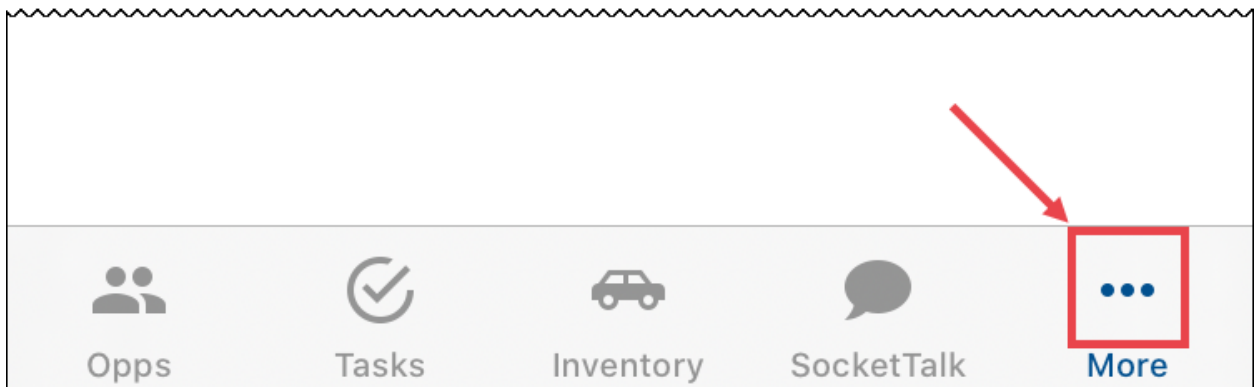
- **Notification Center:** Notifications appear in the list of notifications that are viewable when dragging down on the device screen.
 - **Banners:** Notifications pop up at the top of the screen when the device is in use and disappear after a set amount of time.
5. Use the toggle switch to turn **Sounds** on  or off .
 6. Use the toggle switch to turn **Badges** on  or off . Badges are the red circles that appear on the CRM app icon with a number indicating the number of current unread notifications.
 7. In the Options section, choose whether notifications show previews and how notifications are grouped.


Changing Dealerships

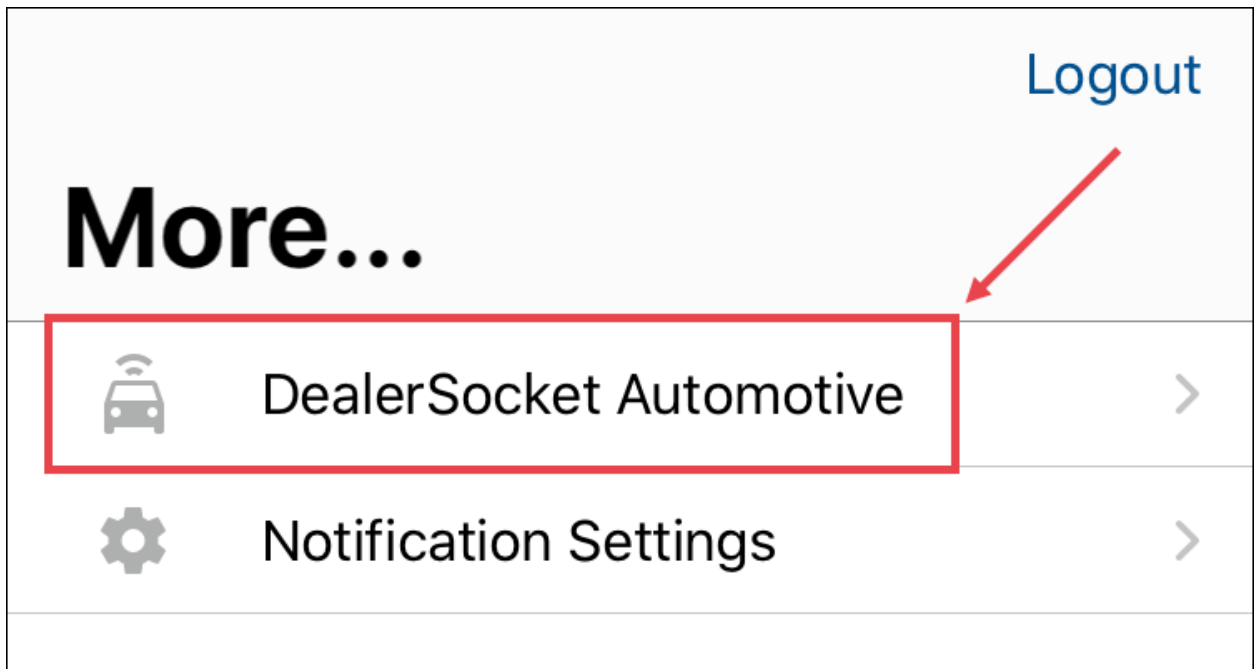
If you have access to multiple dealerships in CRM, you can swap between them using the **More** page .

To change dealerships

1. Tap the **More icon**  at the bottom of the app.



2. On the More page, tap the **dealership** .



A list of dealerships you can access appears.

3. Tap the name of the dealership you want to access.