

Mobile CRM

Pilot Documentation

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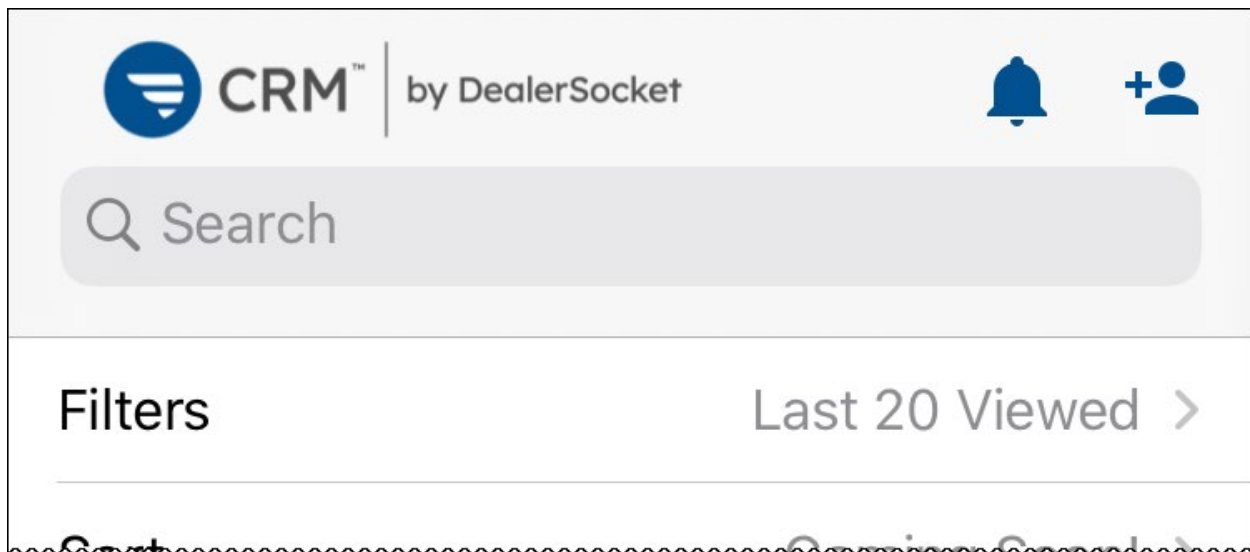
About Mobile CRM

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.

Searching for Customers


Before creating a new contact record in DealerSocket CRM, the best practice is to first search for the customer to prevent the creation of a duplicate record. This practice also helps make sure that the customer is not already working with another salesperson and that any communications the customer receives from the dealership are consistent.

The search bar appears at the top of the **Opps page** .




The search field uses elastic search, which pulls results for partially completed words. For example, searching for mic bar pulls results for any customer name that contains the characters mic and 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.

Opps

The **Opps page**  is the home page of CRM by DealerSocket. By default, the page shows the 20 most recently viewed customers below the Search bar. Tapping the Filters allows you to view Opportunities using the same filters as the Opportunities page in desktop CRM.

Back	Filters	Apply
Customer		
Last 20 Viewed Customers		✓
Appointment To Dos		
BDC Service Appts		
DF Digital Retail		


Tasks

The **Tasks page**  shows Tasks using the same filters as the Tasks page in desktop CRM.


Inventory

The **Inventory page** 


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.

SocketTalk



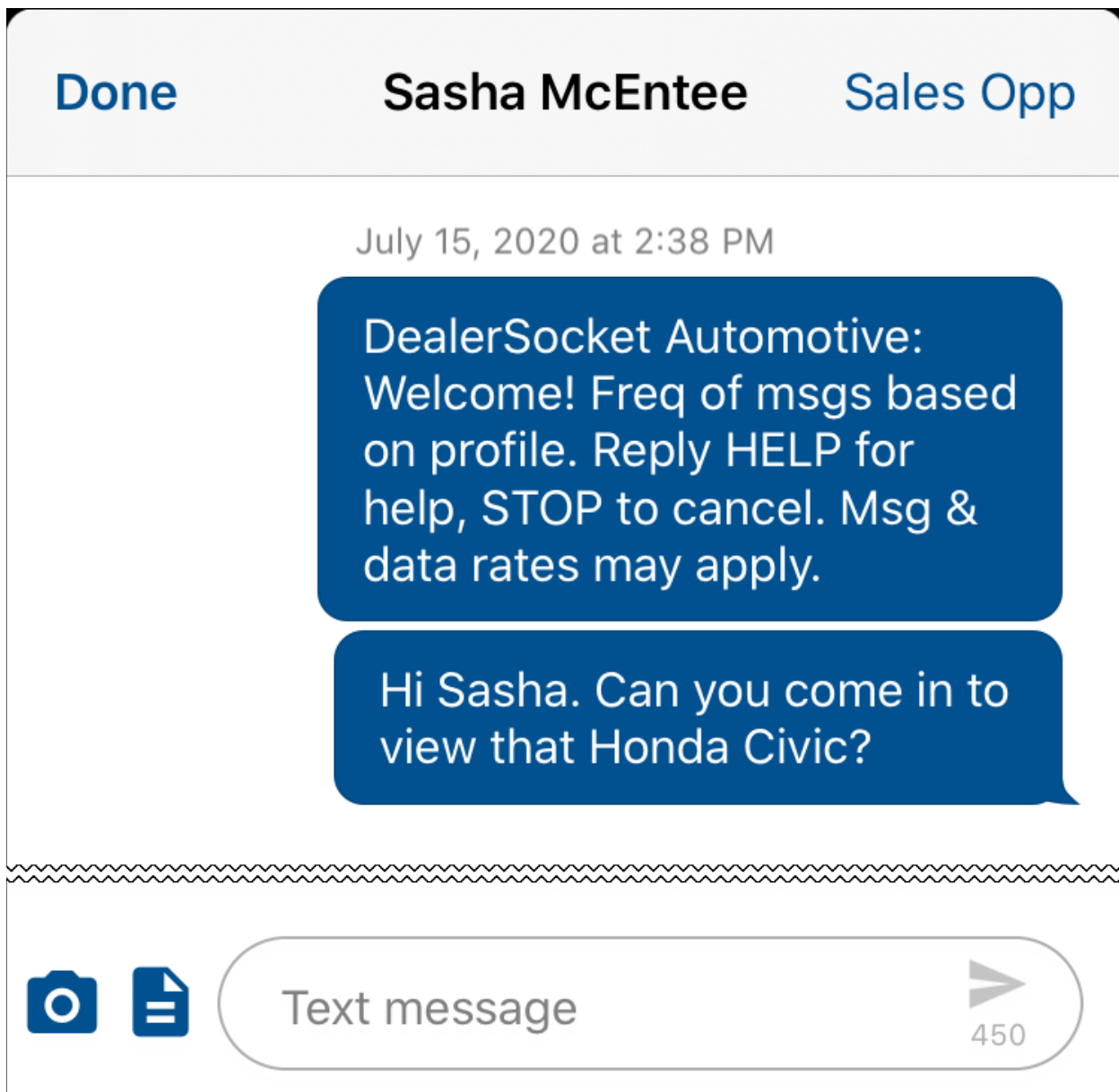
Recent Conversations (1)





Sasha McEntee
Hi Sasha. Can you come in to view t...
07/15/2020 2:39 PM

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

Tap any conversation to open it. Conversations appear in text message format, with your messages appearing in right-hand text bubbles and the customer's responses appearing in left-hand text bubbles.



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, and tap the send icon to send the message.

When your rep opts in your customer while on the phone, the appointment rate jumps 500%. And your compliant when opted in with SocketTalk!




All templates

eBrochure F150 2018

Increase in Appointments with Socket Talk

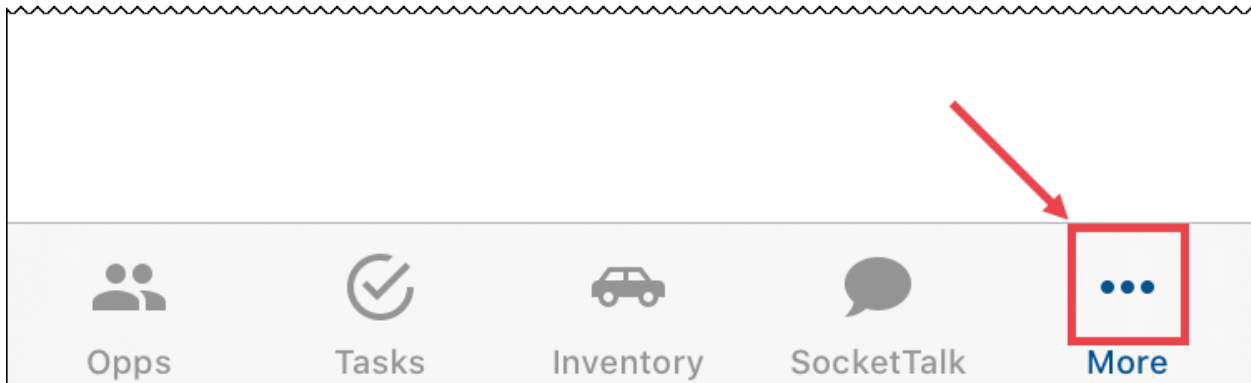
New Inventory

Notification Settings

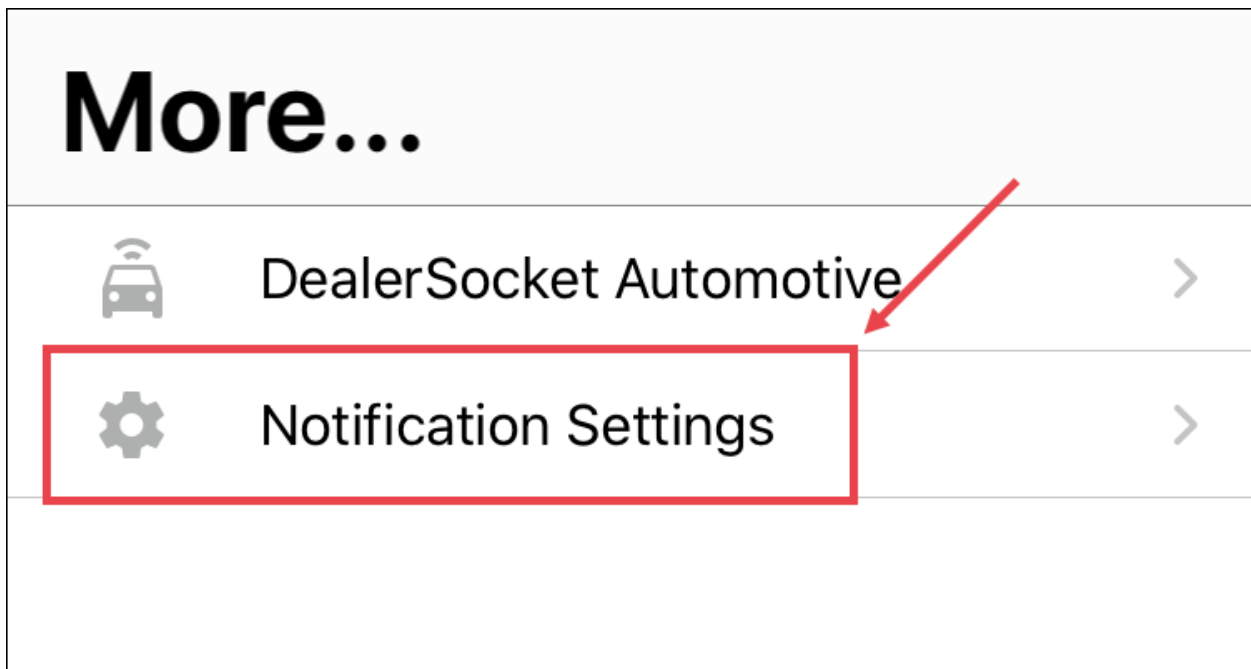
Notifications for CRM by DealerSocket are managed on two levels. In the app, you can choose which notifications you want to receive from the **More page** . You can customize how those notifications appear by using the native settings for your device.

To manage notification subscriptions



1. Tap the **More icon** .



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

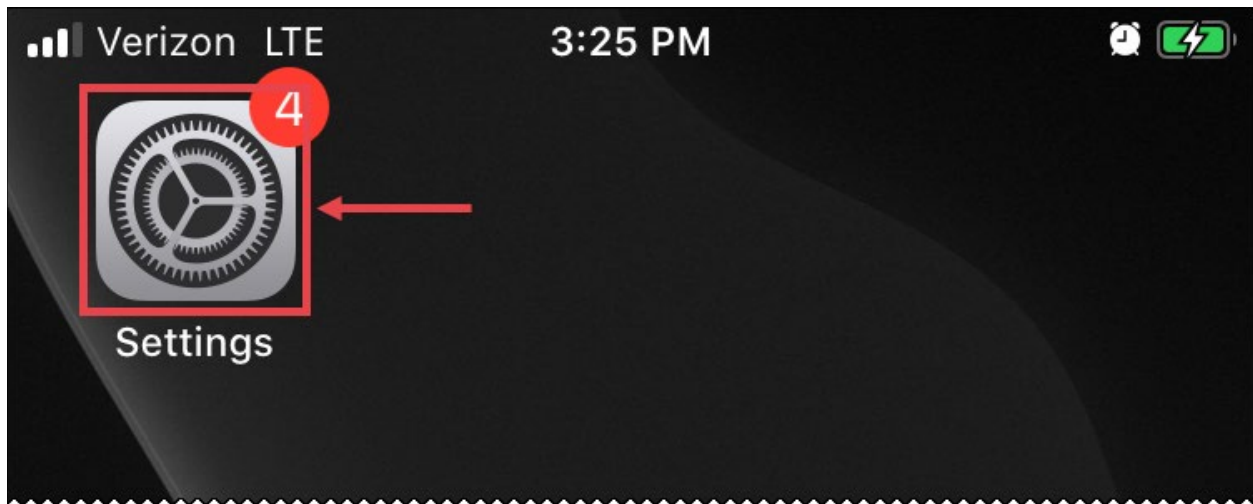


A list of notification types appears.

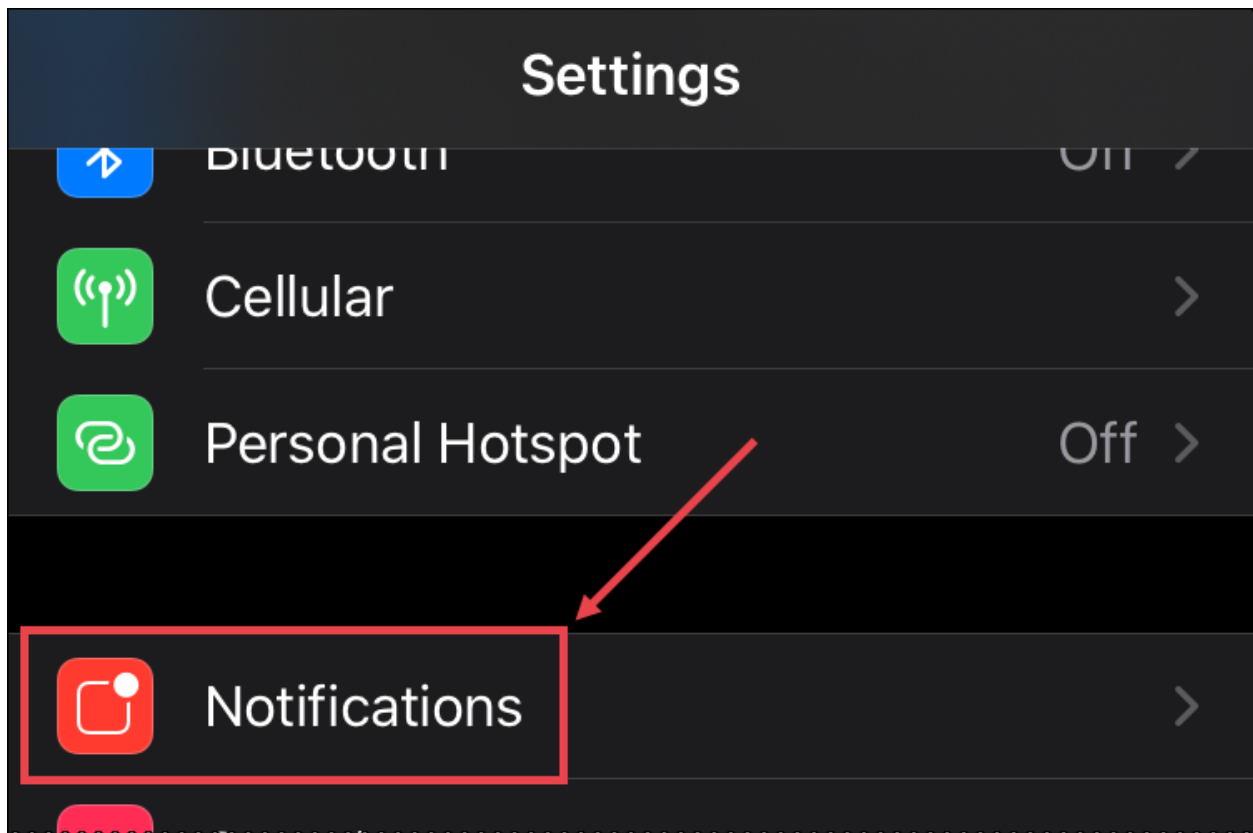
3. Toggle the **switch on**  for notifications you want, and toggle the **switch off**  for notifications you don't want.


To customize native notifications (iOS)

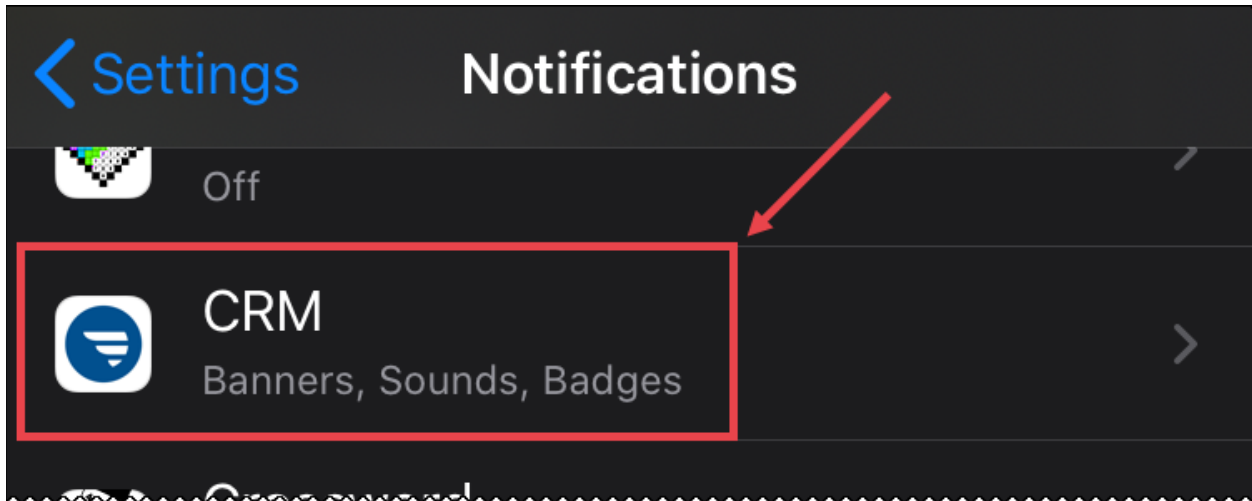
1. On your iOS device, tap **Settings** .



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

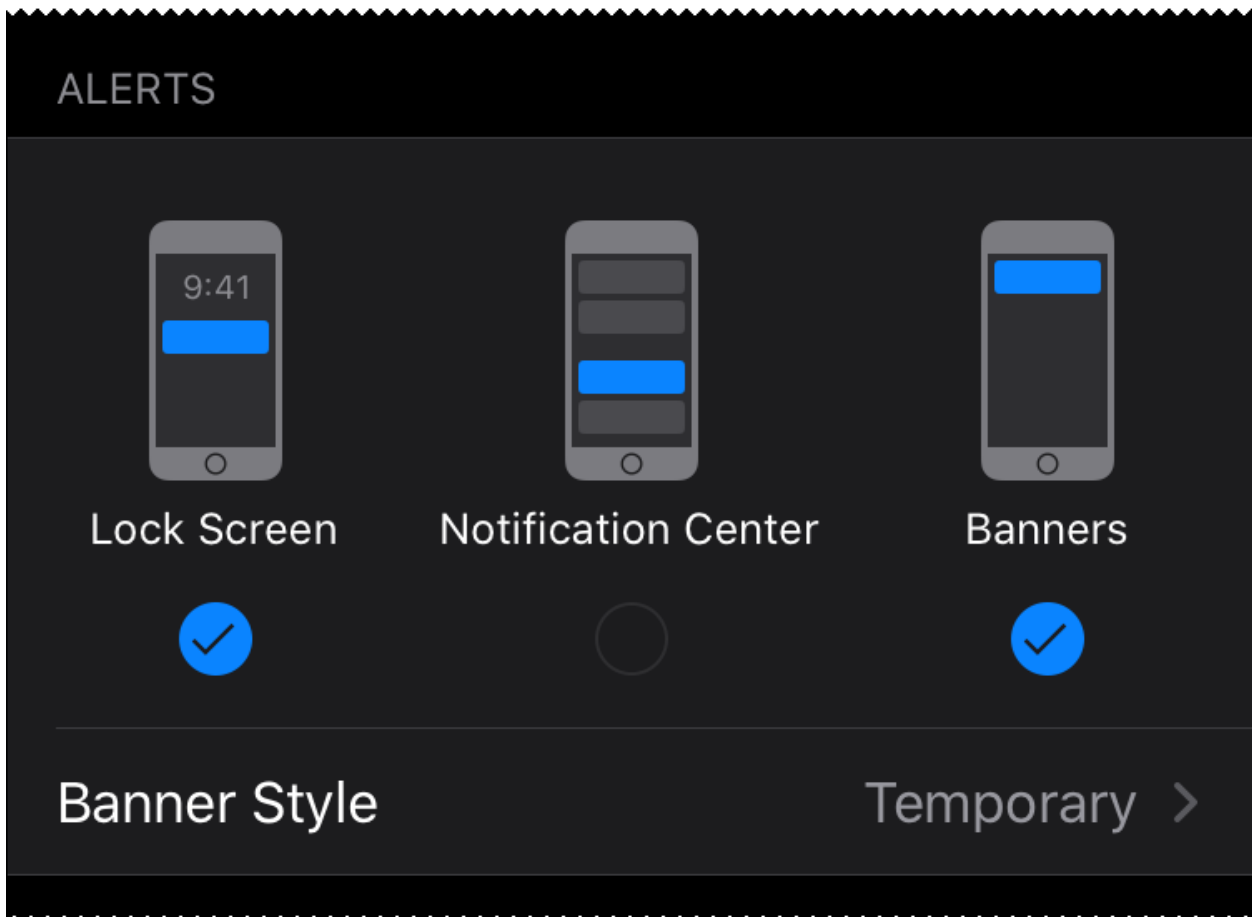


3. Scroll through the list of apps and tap **CRM** .







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.

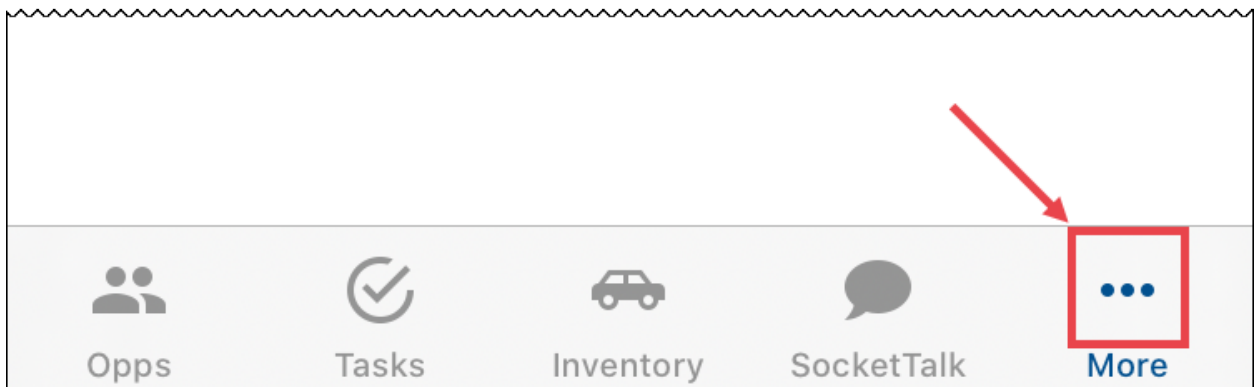
- **Notification Center:** Notifications appear in the list of notifications that are viewable when dragging down on the device screen.
 - **Banners:** Notifications pop up at the top of the screen when the device is in use and disappear after a set amount of time.
5. Use the toggle switch to turn **Sounds** 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

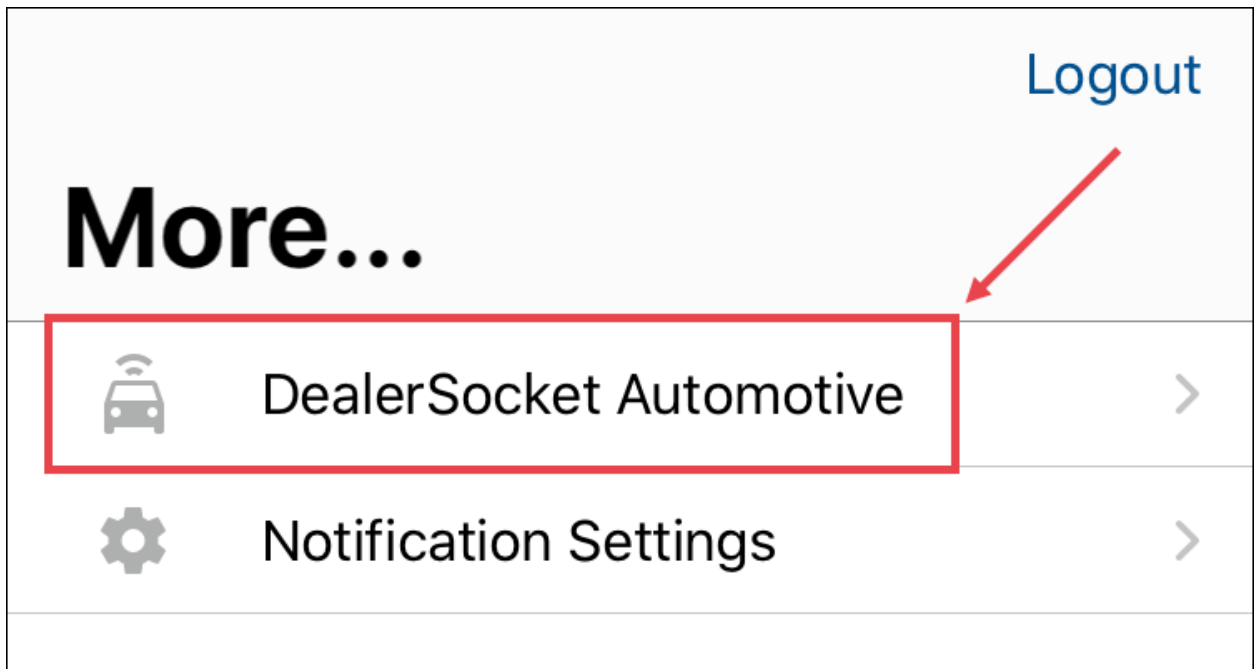
If you have access to multiple dealerships in CRM, you can swap between them using the **More** page **⋮**.

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.