

Chrysler Web Leads for ASI Finance Assistant

This document explains how to use Chrysler Web Leads with your AutoSoft Finance Assistant program. This integration allows you to pull your Internet leads from Chrysler Digital directly into the AutoSoft Finance Assistant program. Once pulled and assigned to a sales representative, the leads are automatically added to the traffic list, so you do not have to manually enter any of the lead information. It is all there for you. All you have to do is follow up on the lead and make the sale.

Setting up AutoSoft Finance Assistant for Chrysler Web Leads

To set up your AutoSoft Finance Assistant program for Chrysler Web Leads, you need to add your AutoSoft account number to the program, enter settings on the CRM tab in the system parameters, and link your result codes to a Chrysler-specific status.

Adding Your AutoSoft Account Number

First, you need to add your AutoSoft account number to the program.

1. From the menu bar at the top of the screen, click **Edit** and select **Account Number**.
2. Enter the ASI Account Number.
3. Click **OK**.



Completing the CRM Parameters

Next, you must enter settings on the **CRM** tab in the system parameters. This is where you set your automated e-mail preferences. This will determine if an e-mail message is automatically sent to a lead from the sales representative assigned to it. If you use automated e-mail messages, you will also create the default messages on the **CRM** tab.

1. From the menu bar at the top of the screen, click **Edit** and select **Parameters**. The Parameters screen appears.
2. Click the **CRM** tab.

The screenshot shows the 'Parameters' dialog box with the 'CRM' tab selected. The 'Select the source for WEB Leads' dropdown is set to 'Chrysler Digital'. The 'Auto Email Leads' checkbox is checked. The 'Lead Email Text' area is empty. The 'Subject Line of E-Mail', 'Email address sent from:', and 'Mail Server Name' fields are also empty. A note at the bottom of the dialog reads: 'The EMail text above will include the leads name and greeting as well as signature information. Do not add this information as it will be duplicated in the emails sent to prospects. This option is ONLY AVAILABLE FOR WEB LEADS.'

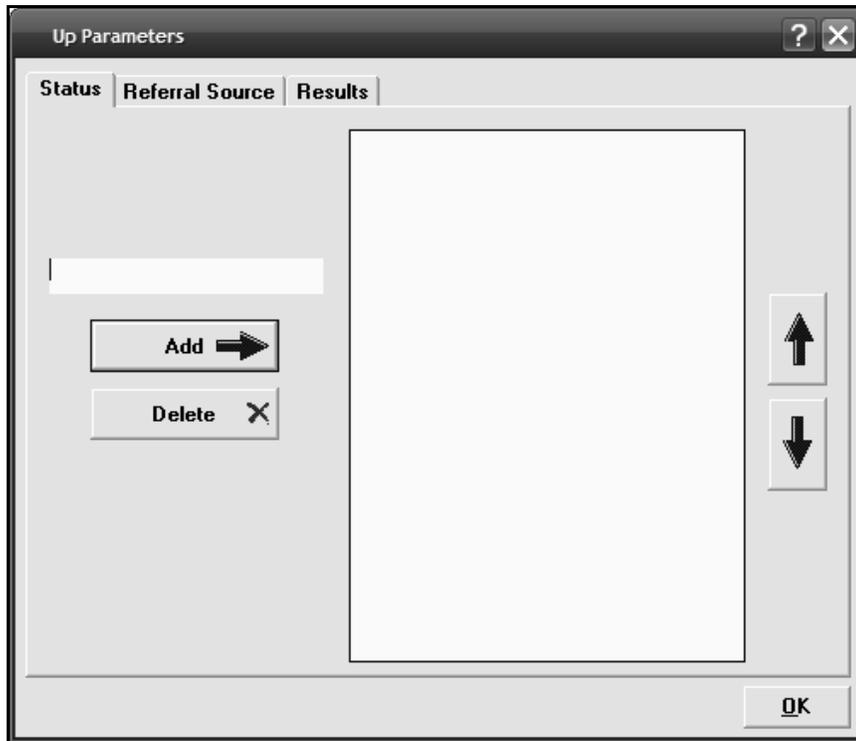
3. Select **Chrysler Digital** in the **Select the source for WEB leads** list. (If **Chrysler Digital** is not available, contact AutoSoft International.)
4. Next, you need to determine if you want an automated e-mail message sent to Web leads.
 - If you want to use the automated e-mail service, click the button in front of **Auto Email Leads** to select it. It should display a check mark. When a web lead is assigned to a sales representative, an e-mail message (including the information you will specify in the following steps) will automatically be sent to the lead.
 - If you do not want to use the automated e-mail service, leave the **Auto Email Leads** option unselected. It should display a minus sign. If you will not be using the automated e-mail service, skip to step 9.

5. Type the text you want to appear as the subject of the e-mail message in the **Subject Line of E-Mail** box.
6. In **E-Mail address sent from**, type the address you want to appear as the "From" address for the e-mail message. This does not have to be a real e-mail address. It serves only to provide a "From" address that can be included with the e-mail message that is generated.
7. The **Mail Server Name** box must contain the server name for your e-mail server. Your network administrator or hardware provider should be able to provide this information for you.
8. Use the **Lead Email Text** window to type the text you want the e-mail message to include. The message will automatically include a signature line that includes "Thank You," followed by the sales representative's name as it appears in the employee information entered in the program, so do not add any of this information.
9. Click **OK** to save the settings.

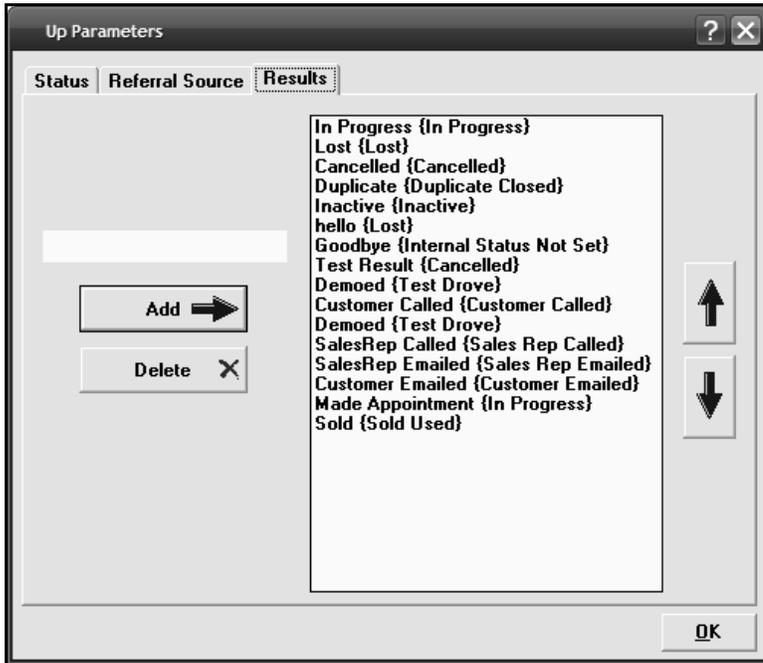
Creating the Chrysler-specific Status Code

Finally, the Chrysler lead integration requires lead dispositions to be sent back to Chrysler. In order for the dispositions to be sent, the result must be associated with a Chrysler-specific status.

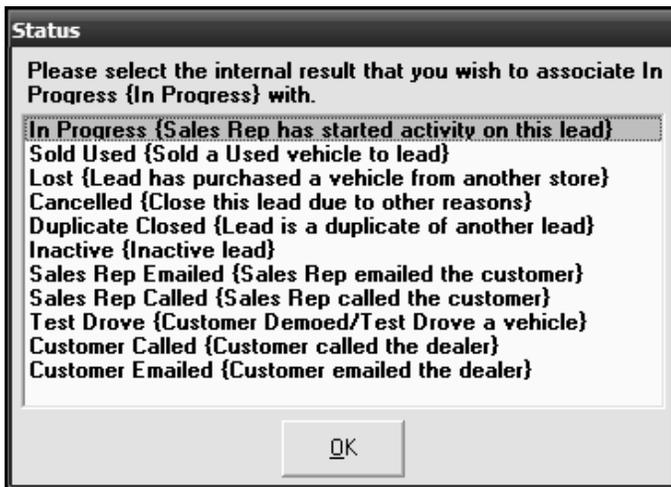
1. From the menu bar at the top of the screen, click **Edit** and select **Up Parameters**. The Up Parameters screen opens.



- Click the **Results** tab. This tab displays a list of results that can be applied to a lead. (Results can be added and removed from the list as needed.)



- Click the result you need to assign to a Chrysler-specific status.
- Right-click the result from the previous step, and select **Set Result Association** from the menu. The window that opens displays a list of statuses that can be assigned to the result.



- Click the status, and then click **OK**. The status will then be associated with the result. The status appears after the result name in curly brackets.
- Repeat these steps for all results. **All results MUST be associated with a status.**

Retrieving Chrysler Web Leads

The following steps explain how to acquire Chrysler Web Leads through Finance Assistant.

1. Click the **Traffic** button on the toolbar at the top of the screen.



2. On the Showroom Traffic toolbar, click the **Get Web Leads** icon (yellow lightning bolt).



3. The system will pull the leads. This may take a few minutes.
4. You will see a list of leads. Use the **SalesRep** list to assign a sales representative to each lead. A lead will remain in this "holding" list until it is assigned to someone.
5. Once you are finished assigning the leads, click **Save and Close**.
6. At this point, if you selected to use the automated e-mail service, an e-mail message will be sent to the lead from the assigned sales representative.
7. The lead will automatically be added to the sales representative's traffic list. The sales representative can click the **Referral** column to sort the leads by the referral source. This will group all of the Chrysler Digital referrals together so you can quickly identify them.
8. The sales representative manages the lead as he/she normally does.

Setting Result Codes

Use the following instructions to set the result (Chrysler status) for a lead.

1. Click the **Traffic** button on the toolbar at the top of the screen.
2. Select the lead to open.
3. Double-click the lead to open it. The lead information fills in on the Traffic screen.

4. Under **Result**, click to select the result you want to assign the lead. This will assign the Chrysler-specific status you assigned to the result to the lead.