AutoSoft GM OneSource

This document explains how to use GM OneSource with your AutoSoft Finance Assistant program. This integration allows you to pull your Internet leads from GM OneSource 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 don't have to manually enter any of the lead information. It's all there for you. All you have to do is follow up on the lead and make the sale.

Important: AutoSoft only provides GM OneSource integration through the AutoSoft Finance Assistant program. If your dealership currently does not use AutoSoft Finance Assistant and you are interested in using AutoSoft as your GM OneSource provider, please contact AutoSoft International at 1-800-427-4367 extension 1201.

Enrolling for OneSource

First, you must enroll in GM OneSource. This involves informing GM that you want to use GM OneSource and indicating that you will be using AutoSoft International as your OneSource provider. To enroll, you must either call GM *or* enroll online through DealerWorld.

Enrolling By Phone

If you choose to enroll by calling GM, you need to do the following:

1. Call **1-888-462-8976**.

2. At the prompt, select **1**.

3. Inform the representative that you want to use GM OneSource and that you will be using AutoSoft International as your OneSource provider.

Enrolling Through DealerWorld

If you choose to enroll through DealerWorld, you need to do the following:

1. Log on to DealerWorld.

2. Click the **Sales** tab.

3. Click the **GM Certified Internet Dealer** link.

4. Click the **Enrollment** tab.

5. Click **Edit Services** at the bottom of the screen.

6. Change your services to AutoSoft International.

Setting Up AutoSoft Finance Assistant For OneSource

To set up your AutoSoft Finance Assistant program for GM OneSource, you need to create a referral source for GM OneSource, and you need to enter settings on the CRM tab in the system parameters.
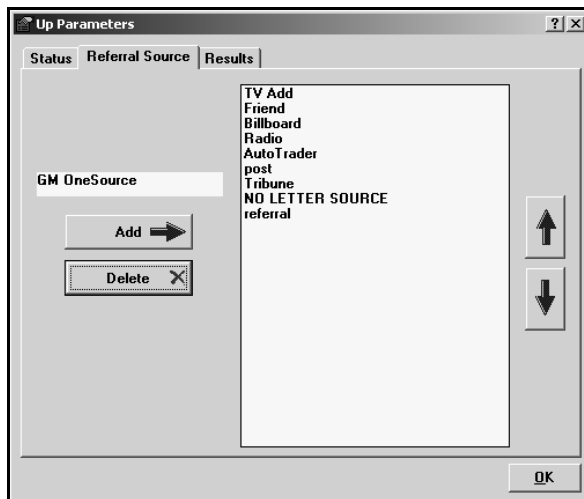
Creating the GM OneSource Referral

First, you need to create a referral source for GM OneSource. This will allow you to assign this referral source as the default referral source for all web leads.

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

1. On the Up Parameters screen, click the **Referral Source** tab.

2. In the blank box on the left side of the screen, type **GM OneSource** as the referral source. If the referral source already exists, do not add it again.

3. Click **Add**. The referral source will appear in the list on the right side of the screen.
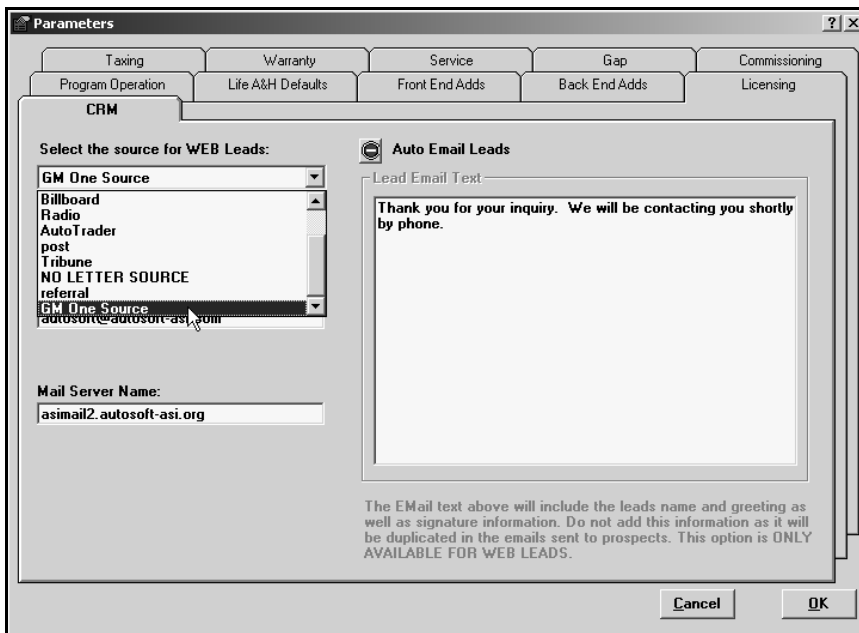
4. Click **OK**.

Completing the CRM Parameters

Once the GM OneSource referral source has been created, you enter settings on the CRM tab in the system parameters. First, you need to set your default web lead to GM OneSource. This allows you to quickly identify the GM OneSource leads so you can take the necessary actions with the lead. Next, you need to 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.

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

2. The Parameter screen appears and displays the **CRM** tab.

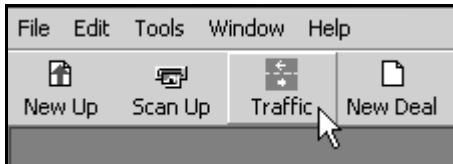3. Select **GM OneSource** in the **Select the source for WEB leads** list.

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. If you selected to use the automated e-mail service, 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 setting.

Pulling Leads

AutoSoft International will send your dealership an e-mail message indicating there are leads available through OneSource. You must then pull the leads and assign them to a sales representative.
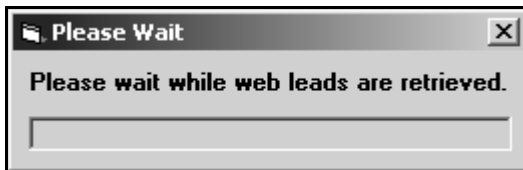
1. Click the **Traffic** button on the toolbar at the top of the screen.
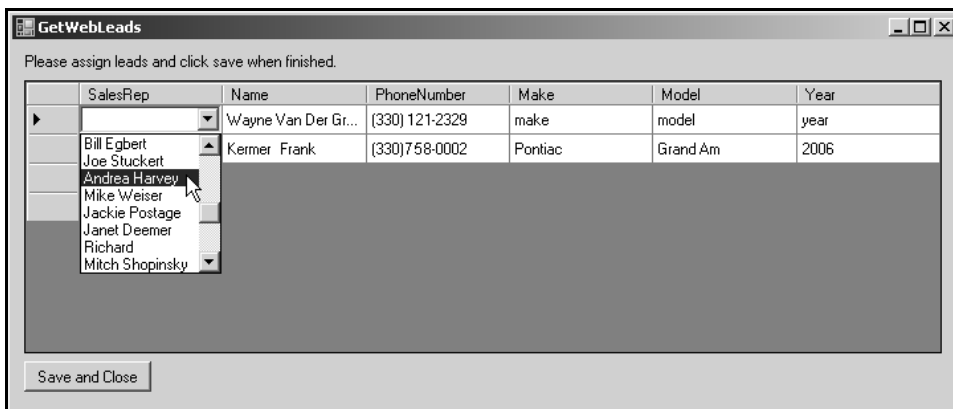

2. On the Showroom Traffic toolbar, click the **Get Web Leads** icon (yellow lightning bolt).
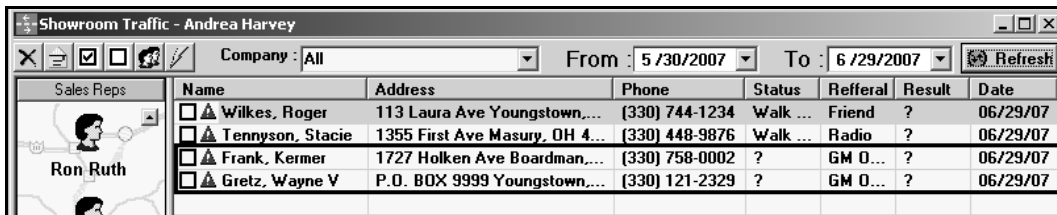

3. The system will pull the leads. This may take a few minutes.

4. You will see a list of leads from OneSource. 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 GM OneSource referrals together so you can quickly identify them.

Name	Address	Phone	Status	Refferal	Result	Date
Wilkes, Roger	113 Laura Ave Youngstown,...	(330) 744-1234	Walk ...	Friend	?	06/29/07
Tennyson, Stacie	1355 First Ave Masury, OH 4...	(330) 448-9876	Walk ...	Radio	?	06/29/07
Frank, Kermer	1727 Holken Ave Boardman,...	(330) 758-0002	?	GM O...	?	06/29/07
Gretz, Wayne V	P.O. BOX 9999 Youngstown,...	(330) 121-2329	?	GM O...	?	06/29/07

8. The sales representative manages the lead as he/she normally does.