

Step	Action	Description	Who
FILE TRANSFER:			
1	CRM & DMS Field Review	<ul style="list-style-type: none"> Dealer contact & ADS review the fields included in both CRM & DMS ADS will mark which fields should be exported 	ADS & Dealer
2a	Export data from CRM and DMS to CSV files	<ul style="list-style-type: none"> Use the following naming convention for files: Dealership Name_File Type [CRM OR DMS]_Date [format: DD.MM.YEAR] <i>Example:</i> Smith Auto_DMS_11.05.2024 	Dealer
3a	Upload CSV files to SFTP	[ADD SFTP ADDRESS HERE]	Dealer
OR			
2a+3a	ADS exports data from CRM and DMS	<ul style="list-style-type: none"> Dealer provides login credentials ADS exports data from CRM and DMS platforms 	ADS
DATA PROCESSING:			
4	Duplicate CSV files as backup	<ul style="list-style-type: none"> Backup is stored in a secure server Backup is deleted 10 days after the cleaned files are delivered 	ADS
5	Update customer records on both CRM and DMS	<ul style="list-style-type: none"> Customer contact information is updated 	ADS
6	Consolidate customer records on both CRM and DMS	<ul style="list-style-type: none"> Multiple records for the same customer are merged and consolidated into a single customer record on the CRM and DMS 	ADS
7	Duplicate records are removed	De-duplication, NCOA, Phone and Email Append	ADS
8	Quality Checks	Cass certification per USPS protocol	ADS
9	Cleansed CSV files are provided back to the dealer		ADS

Fields to be included in the data exports:

These fields will be updated:

- Name
- Address
- City, State, Zip
- Phone
- Mobile phone
- Email

These fields are for reference only:

- Purchase date
- RO date
- VIN
- Year, Make, Model
- Deal type (new/used)
- Sales person number
- RO number
- Term

Data files provided back to the dealer:

- Dealer will receive clean data files with updated contact details, and purged of all duplicate records
- Dealer will receive 4 separate CSV files back:
 - CRM – Updated Customer Records
 - CRM – Duplicate records that were removed*
 - DMS – Updated Customer Records
 - DMS – Duplicate records that were removed*
- Can be used to purge duplicates from the CRM and DMS: ADS will provide on-going support on each step.