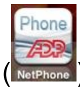
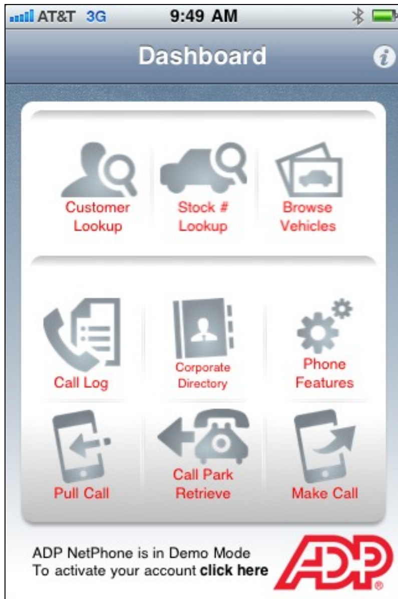
Launching the ADP NetPhone Mobile App

You can view short, informative videos at the following location: http://dealer4386.adpwebmarketing.com/index.cfm?action=dealerlink&Link=1454080

Launching NetPhone

1. Tap **NetPhone** (). The Dashboard screen displays.



The screen is divided into two areas:

Information Lookup and Lead Generation

- **Customer Lookup**: Search for a customer using customer's phone number.
- **Stock # Lookup**: Search for a vehicle and generate a lead, or add to an existing lead.
- **Browse Vehicles**: Search for a vehicle and generate a lead, or add to an existing lead.

Network Phone

Note: If you are a NetworkPhone Enterprise client, you may not see all of these buttons as noted.

- **Call Log**: View incoming, outgoing, and missed calls and make calls from this screen.
- **Corporate Directory**: Search for and/or call employees.
- **Phone Features**: Configure Do Not Disturb, Ring Reminder, Call Forwarding, and Network Phone settings.
- **Pull Call**: Pull an active call (Network Phone ASP customers only).
- **Call Park Retrieve**: Retrieve parked calls (Network Phone ASP customers only).
- **Make Call**: Dial a phone number.

Getting Back to the NetPhone Screen

1. Tap Home icon to go back to the dashboard.
2. If "Dashboard" displays in upper-left, tap to go back to the dashboard. When performing a multi-screen process (i.e., Customer Lookup), keep tapping the button in upper-left to get back to the dashboard.

Looking Up Customers Look-up a customer using the customer's phone number. The mobile app performs a DMS search first (ADP Drive); if the customer is not in the database, a reverse number look-up is performed through a 3rd-party product called Axiom.	**Looking Up a Customer** 1. On the dashboard, tap **Customer Lookup**. The Lookup screen displays. 2. Tap a 10-digit number and then tap **Search**. **Note**: You **must** enter a 10-digit number first; you cannot just tap **Search** to return all numbers nor can you enter a partial number (for example, 503-555). The Customer Lookup Information screen displays.
Editing the Current Lead Contact When creating a new lead, you may need to edit the information. Important! If a customer has an existing lead and you create a new lead and change any information for the current lead (that is not saved yet), it will NOT update the existing lead in the database. For example, you created a lead for Mr. Smith two years ago. He is turning in his lease and wants to purchase a new vehicle. He's moved, so you create a new lead with his new address. If you performed a Customer Lookup search, the search would return two results in the system – the lead you just created with the new address and the lead created two years ago with the old address.	**Creating a New Contact** 1. On the Customer Lookup screen, tap **Edit**. The customer's phone number screen displays. 2. Tap the section to edit. 3. Tap the field – keyboard displays at bottom of screen. 4. Make the changes, tap **Done** at the bottom, and then tap **Done** in the upper-right. The customer's phone number screen displays. 5. Tap **Save**. The Customer Lookup Information screen displays with the updated information.
Adding Contacts to Your iPhone Enter contacts to your iPhone using by creating a new contact or adding to an existing contact.	**Adding a Customer to Your Contacts** 1. On the Customer Lookup Information screen, tap **Add to Contacts**. The Info screen displays. You have two options: • **Create New Contact**: Tap to edit or delete the existing customer's contact information. 2. **Add to Existing Contact**: Tap to add the currently-selected customer to an existing contact (for example, Mrs. Smith to Mr. Smith). **Creating a New Contact** 1. On the Customer Lookup Information screen, tap **Add to Contacts**. The Info screen displays. 2. Tap **Create New Contact**. The New Contact screen displays. 3. Tap the field and make the changes using the keyboard and then tap **Done**. **Adding to an Existing Contact** 1. On the Customer Lookup Information screen, tap **Add to Existing Contact**. The All Contacts screen displays, which contains all saved contacts. 2. Tap the contact's name you want to add the selected contact to.

Generating a Lead

You can create a lead for an existing customer that is in your CRM. You can optionally add a vehicle to the customer lead. You can generate a lead from the following sources: Customer Lookup, Browse Vehicles, Stock # Lookup, and the Call Log.

For the Customer Lookup and Browse Vehicles, you perform the initial search and then enter the Lead screen. For the Call Log, you tap the number associated with the customer's phone number and then enter the Lead screen. These instructions provide more details.

Generating a Lead from Customer Lookup

1. Tap **Customer Lookup**. You can also generate a lead from a vehicle or contact; the sections that follow explain how.
2. Enter the 10-digit phone number of the customer whose lead information you want to change and click Search. The Customer Lookup Information screen displays.
3. Tap **Lead**. The Lead Generator screen displays.
4. Optional: If you need to edit the customer's information, tap **Edit**. The customer's information screen displays.
   - Tap the respective field and make the changes using the keyboard and then tap **Save**. The Lead Generator screen redisplays with the new information. This may take a few seconds to load as it pulls information from rooftops. By default, the cursor defaults to the Stock Number field. If you want to search by make, skip to Step 5.
   - Tap **Add** to add a vehicle to the lead. The Vehicle Lookup screen displays.
5. Tap the **Choose a Dealership** drop-down menu. The screen displays a dealership list.
6. Scroll through and highlight the dealership you want to search then tap **Select**.
7. Tap the Stock Number field if you know the stock number and tap Search. If you do not know the stock number, tap Go to Browse Vehicles. The Browse Vehicles screen displays.
8. Tap the Make drop-down menu. The screen displays a list of manufacturers that match the existing inventory with the number of available vehicles (for that manufacturer) in ( ).
9. Scroll through and highlight the manufacturer then tap **Select**.
10. Tap the Model drop-down menu.
11. Scroll through and highlight the model you want then tap **Select**.
    Tip: At this point, if there are multiple models, you can tap the Year and Trim drop-down menus, respectively, to make your search more granular. If you have a large dealership, this can help you fine-tune a search for a customer looking for a model with specific options.
12. Tap **See Results**. The Vehicle page displays. To learn about the vehicle, tap the following buttons:
    - **Details**: Tap to find out basic information on the vehicle, such as body, city and highway MPG, exterior/interior color, odometer reading, transmission, and VIN.
    - **Features**: Tap to display a list of all features.
    - **Lead**: Tap to generate a lead.

    Tip: To go back to the Vehicle page, tap Vehicle in the upper-left.
13. Tap **Lead**. The Lead Generator screen displays.
14. Verify the information is correct and then tap **Generate Lead**.

Generating a Lead from Stock # Lookup

1. Tap **Stock # Lookup**.
2. Scroll the list of dealerships and tap **Select** to select the dealership.
   Tip: If there is only one rooftop, the mobile app skips to Step
3. Tap the Stock Number field, tap the stock number, and then tap **Search**.
   Tip: You can also tap **Go To Browse Vehicles** to perform a more general search. The Vehicle page loads.
4. Complete Steps 3 through 14 in the above section, Generating a Lead from Customer Lookup.

Generating a Lead from the Call Log

1. Tap **Call Log**. You can also generate a lead from a vehicle or contact.
2. Tap the  in the row of the customer you want to generate a lead for.
3. Complete Steps 3 through 14 in the above section, Generating a Lead from Customer Lookup.

Editing a Lead's Information

You can edit a lead's information.

Editing a Lead's Information

4. Tap **Customer Lookup**.
5. Enter the 10-digit phone number of the customer whose lead information you want to change and click Search. The Customer Lookup Information screen displays.
6. Tap **Lead**. The Lead Generator screen displays with the customer and vehicle information.
7. Tap **Edit** in the Customer or Vehicle area.
8. Tap the area you want to change (name, street address, or city/state/zip code).
9. Tap the field and make the changes using the keyboard.
10. Tap **Done** in the lower-right. The Customer Information screen redisplays with the updated information.
11. Tap **Done** in the upper-right.
12. Tap **Save** on to save your changes. The Customer Information screen redisplays with the updated information.

Stock # Lookup

You can look-up a vehicle using the vehicle's stock number.

Looking Up a Stock Number

1. On the dashboard, tap **Stock # Lookup**. The Vehicle Lookup screen displays.
2. Tap the **Choose a Dealership** drop-down menu. The screen displays a dealership list.
   Note: If you only have one rooftop, you are not prompted to select a dealership and NetPhone displays the inventory for your single dealership.
3. Scroll through and highlight the dealership you want to search then tap **Select**.
4. Tap the Stock Number field and enter the stock number using the keyboard.
5. Tap **Search**. The corresponding Vehicle page displays. From here, you can view the vehicle's details and/or features, and generate a lead.

Browsing Vehicles

You can search a dealership's inventory using the Browse Vehicles. If you are a multi-site dealership, you can select which dealership's inventory to view.

Browsing a Dealership's Inventory

1. On the dashboard, tap **Browse Vehicles**. The Browse Vehicles screen displays.
2. Tap the **Choose a Dealership** drop-down menu. The screen displays a dealership list.
3. Scroll through and highlight the dealership you want to search then tap **Select**.
4. Tap the Make drop-down menu. The screen displays a list of manufacturers that match the existing inventory with the number of available vehicles (for that manufacturer) in ( ).
   Tip: At this point, you can tap **See Results** to see the available vehicles of that make. However, if you are a large dealership and the customer wants a specific model, you can make your search more granular by selecting model, year, and trim and *then* clicking **See Results**.
5. Tap **See Results**. The Vehicle page displays.
   Tip: If you did not select a specific model prior to tapping See Results, the Browse Vehicles page displays all vehicles for that manufacturer (for example, all Chevrolets and not a Chevy Corvette). To view an individual vehicle, tap the row that contains the vehicle you want to view.
   From here, you can tap the following buttons:
   - **Details**: Tap to find out basic information on the vehicle, such as body, city and highway MPG, exterior/interior color, odometer reading, transmission, and VIN.
   - **Features**: Tap to display a list of all features.
   - **Lead**: Tap to generate a lead.

   Tip: To go back to the Vehicle page, tap Vehicle in the upper-left.

Call Log

The Call Log shows each call record from your desk phone. The Call Log shows calls to/from the phone line(s) associated with the user created by an administrator.

Inbound calls display as ; outbound calls display with a . Missed calls display the customer's name in red font.

Viewing the Call Log

1. On the dashboard, tap **Call Log**. The Call Log screen displays. By default, the Call Log displays all calls. To view missed calls, tap **Missed**; to view inbound calls, tap **In**; and to view outbound calls, tap **Out**.

   Tip: At any point in time, tap **Refresh** ( ) to refresh the Call Log display.
2. To call a customer, tap the row that contains the call record of the customer you want to call. A popup displays, allowing you to tap **Cell Dial** to dial the call via the cell phone carrier or tap **Net Dial** to dial using the Network Phone ASP infrastructure (if available).
   Cell Dial lets you dial a phone number using the phone's cell carrier as the originating point for the call. **Cell Dial** cannot dial internal 4-digit numbers.

   Net Dial dials a phone number using your Network Phone ASP office line as the originating point for the call. **Net Dial** can dial any phone number including internal 4-digit extensions. When you tap **Net Dial**, you will receive a callback from the Network Phone ASP system. Upon answering this call the phone will begin to ring the called party.
3. Tap Cancel to cancel the call.

Corporate Directory

You can look up and dial contacts from your dealership's corporate directory.

Accessing the Corporate Directory

1. Tap **Corporate Directory**. The Directory screen displays.
2. Scroll the screen to find the number to call and then tap the individual's name. A popup displays, allowing you to tap **Cell Dial** to call their cellphone or tap **Net Dial** to dial from a net source.
   Cell Dial lets you dial a phone number using the phone's cell carrier as the originating point for the call. **Cell Dial** cannot dial internal 4-digit extensions.

   Net Dial dials a phone number using your Network Phone ASP office line as the originating point for the call. **Net Dial** can dial any phone number including internal 4-digit extensions. When you tap **Net Dial**, you will receive a callback from the Network Phone ASP system. Upon answering this call the phone will begin to ring the called party.

Managing Your Desk Phone Settings

You can control the status of your desk phone (Network Phone ASP customers only) using the NetPhone App on your iPhone, including do not disturb and call forwarding.

Configuring Network Phone

1. On the dashboard, tap **Phone Features**.
2. Tap **Network Phone**.
3. Ensure the slider is set to On for Network Phone.
4. Verify the Network Phone slider is on.
5. Verify the Answer Confirmation slider is set to **On**. By default it is; however, if you do not want Answer Confirmation on, slide the slider to **Off**.
6. Tap **Save**.

Changing Do Not Disturb on Your Desk Phone

1. On the dashboard, tap **Phone Features**. The Do Not Disturb status reflects what is currently set on the desk phone.
2. Tap the Do Not Disturb field.
3. Slide the Do Not Disturb slider to change the setting and then tap **Save**. When Do Not Disturb is **On**, calls to your desk phone will be forwarded directly to voice mail.

Ring Reminder

When Do Not Disturb is **On** and Ring Reminder is enabled, your Desk Phone rings once any time a call is received reminding you that Do Not Disturb is in effect.

1. On the dashboard, tap **Phone Features**.
2. Tap the Ring Reminder field.
3. Slide the Ring Reminder slider from **Off** to **On** and then tap **Save**.

Configuring Call Forwarding on your desk phone

1. On the dashboard, tap **Phone Features**.
2. Tap **Call Forwarding**. You can specify the number you want to forward calls to for the following three situations:
    - Always: Every call is forwarded number specified.
    - Busy: If your line is busy, call is forwarded to number specified.
    - No Answer: If you do not pick-up the call, call is forwarded to number specified.
      Note: If Call Forwarding is not enabled, calls are forwarded to voice mail (if available) for Busy, Call Forward, and/or No Answer.
3. Tap the field that corresponds to the ringing scenario (Always, Busy, or No Answer) you want to specify and slide the slider to **On**:
    - Always: Forwards the call whenever the phone rings to the designated number.
    - Busy: Forwards the call if the employee is on the line.
    - No Answer: Forwards the call to the designated number after the phone rings three times with no answer.
4. Tap **Save**,

Making a Call

You can dial a number using the phone’s cell carrier.

If you are a Network Phone ASP customer, you can use your cell phone to make calls as if they came from your desk phone.

Making a Call from the Dashboard

1. On the dashboard, tap **Make a Call**. The Make Call screen displays.
2. Tap the number you want to call. You have two options for making a call:
    - **Cell Dial** lets you dial a phone number using the phone’s cell carrier as the originating point for the call. Cell Dial cannot dial internal 4-digit extensions.
    - **Net Dial** is a phone number using your Network Phone ASP office line as the originating point for the call. Net Dial can dial any phone number including internal 4-digit extensions. When you tap **Net Dial**, you will receive a callback from the Network Phone ASP system. Upon answering the call, the phone begins to ring the called party.
3. Tap **Network Dial** or **Cell Dial** to make the call.

Pull Call (Network Phone ASP Customers Only) You can use your iPhone to seamlessly transfer a call in progress on your desk phone to your iPhone.	**Pulling Calls** 1. While you are on a call on your desk phone, tap **Pull Call**. A Dialing dialog displays, indicating a connection will be made shortly. 2. Tap **OK**. 3. When the call connects, tap in your voice mail passcode, followed by #. 4. When prompted for a number, tap ***11**. The call in progress on your desk phone will be seamlessly transferred to your cell phone.
Call Park Retrieve (Network Phone ASP Customers Only) You can pick up calls parked on your dealership's phone system using your iPhone.	**Retrieving Parked Calls** 1. Tap **Call Park Retrieve**. 2. When the call connects, enter your voice mail passcode, followed by #. 3. Tap ***88** then the park extension, followed by #. The call holding at the Park Extension entered will be retrieved to your iPhone.