

1-877-859-0195 Tech Support

Web address: <http://www.eleadcrm.com/evo2>

Username: _____ Password: _____

1. To Add a Prospect

Click the 'ADD' button at the top of the screen in the menu bar.



Enter a First and Last Name, Click Search and this will search for a match in *your* database, if there is no match, **Step 3** Click 'No Match Found – Add New Customer'.

Step 1

Step 2

Step 3

In Showroom	Match	Name	Home Phone	Primary Rep	Date In	Action
<input type="checkbox"/>	100%	Ieracitano, Thomas	229-251-2462	Ieracitano, Thomas	2022-08-01	More Info Add Me
<input type="checkbox"/>	50%	Whitt, Thomas	423-313-1531	Harris, Isaiah	2022-11-03	More Info Add Me
<input type="checkbox"/>	50%	Stinnett, Thomas	706-934-9759	Phillips, Tim	2022-08-31	More Info Add Me
<input type="checkbox"/>	50%	Holland, Thomas	334-740-8669	Langston, James	2022-07-30	More Info Add Me
<input type="checkbox"/>	50%	Np, Thomas	423-991-2970	Phillips, Tim	2022-07-27	More Info Add Me
<input type="checkbox"/>	50%	Finch, Thomas	423-505-2824	Mason II, Philip	2022-07-15	More Info Add Me
<input type="checkbox"/>	50%	BRUCE, THOMAS	423-667-0116	Caylor, Darren	2022-04-25	More Info Add Me
<input type="checkbox"/>	50%	FRANKS, THOMAS HENRY	423-595-0965	Mulkey, Glenn	2022-03-31	More Info Add Me
<input type="checkbox"/>	50%	Woo, Thomas	510-381-9085	Shadrick, Brittanie	2022-10-16	More Info New Sales
<input type="checkbox"/>	50%	Yarborough, Thomas	706-508-3064	Shadrick, Brittanie	2022-10-10	More Info New Sales

Look to see if there is a match to a record!!!

Add/Edit Prospect


Customer Information

Prefix: First: Middle: Last: * Suffix: Nickname:

Thomas Teracitano

Street 1: 100 main street


Street 2:

City: Valdosta County: GA State: Select Zip: 31602 

Home #: 706 Evening Do Not Call: Preferred:

Cell #: 706 Do Not Call: Preferred:

Business #: 229 251-2462 Ext: Dig Day Do Not Call: Preferred:

Primary Email: thomas@digitalcarguy.com  Do Not Email:

Secondary Email:

BirthDay: Dealer ID: SSN:

Note# 1
Click on
the House

Good eMail

Vehicle of Interest

VIN: Mileage:

* Class: Auto Truck New/Used: New Stock:

Year: -Select- To: -Select- Make: -Select-

Model: -Select- Trim: -Select-

VIN: Mileage:

Class: Auto Truck Year: -Select- Vehicle Type:

Make: -Select- Model: -Select-

Trim: -Select- Transmission: Automatic Color: -Select- [edit]

Lender: Payoff: Payoff Date:

Insurance Company: Policy Number: No Tax Credit:

Note#3 Click on the spy glass!

Note# 3 Enter the VIN for the trade!

Opportunity Information

Salesperson: * Type: --Select-- Next Activity:

BDC Agent * Source: Next Activity Date: 11/10/2022

Desk Manager * Status: New Next Activity Time: 12 PM 23

Date In: 11/9/2022 Time In: 12 PM 23 Time Out:

In Showroom Demo Write Up TO

Note# 4
Only fields marked with a
red * are required.
How many are on this page?

Comments:

Every 'Deal' has a story ! type your notes in here.

0 / 1500

Save Cancel

Opportunity Details

eBrochure | Email | Letter | Phone | Text Message | Schedule | Sales | Credit App | 5 Liner | Forms | Add Note | Print Info | Merge

CUSTOMER

Name: Thomas Ieracitano ID: 77718865

Address: LA FAYETTE, GA 30728

Home #:
Cell #: (229) 251-2462
Work #:

Preferred Email: thomas@digitalcarguy.com

BirthDay:

Avail for CallCenter:

Last Modified: 8/10/2022 10:23:31 AM

High Priority:

Text Preferred:

[Customer Search](#) [Reward Search](#)

OPPORTUNITY [+ Add Trade In](#)

Vehicle: New 2022 Chevrolet Silverado 1500 Custom 4x4 Crew Cab 5.75 ft. box 147.4 in. WB 3GCPDBEK5NG562956

Stock #: 30183

Trade:

Sales Teams: Ieracitano, Thomas - Primary Administrator
Gonzalez, Dominique - Primary Salesperson (inactive)
Hall, Tyler - Salesperson (inactive)
Mason II, Philip - Primary Desk Manager (inactive)

OpType: Internet Up

Provider: General Motors

Source: GM Dealer Web

Sub-source: Sincro - Request A Quote - Short Lead Form

Date/Time Due: 11/9/2022 1:45:00 PM

Sales Status: Working

ACE is currently engaged with this lead. [Disengage ACE](#)

In Showroom **Demo** **Write Up** **TO**

Any words in BLUE,
Are Links to open, edit and/or
make changes to the record.

Contacts | **Service** | **Relationships** | **Ins/Other** | **Lifetime Value** | **Vehicles** | **Audit Trail** | **Equity**

Scheduled Activities [Delete All](#)

Due	Type	Assigned To	Comment	Action
11/09/22 1:45 PM	Phone Call or Text	Ieracitano, T		+ Complete Edit

Completed Activity History

Date Completed	Activity Type	Outcome	Comments	Completed By	Action
8/01/22 11:51 PM	Active - Working	WebLink - GM Dealer Web		Ieracitano, T	N
10/29/22 11:20 AM	Text Message	Completed		System	View
9/14/22 12:26 PM	Inbound Call 00:21	Completed (706) 620-0265	http://www.carwars.com/review_x.cfm?cid=6000557405...	System	View Edit Delete
9/03/22 10:58 AM	GM Auto Emails #8	Complete	a quick note	http://www.carwars.com/review_x.cfm?cid=6000557405946&lid=147458&src=A9BA6518F54397775050F52A65A3D3FB188ADE4965	Edit Delete
8/24/22 10:55 AM	GSM Auto Emails #7	Complete	what our next step should be	http://www.carwars.com/review_x.cfm?cid=6000557405946&lid=147458&src=A9BA6518F54397775050F52A65A3D3FB188ADE4965	Edit Delete

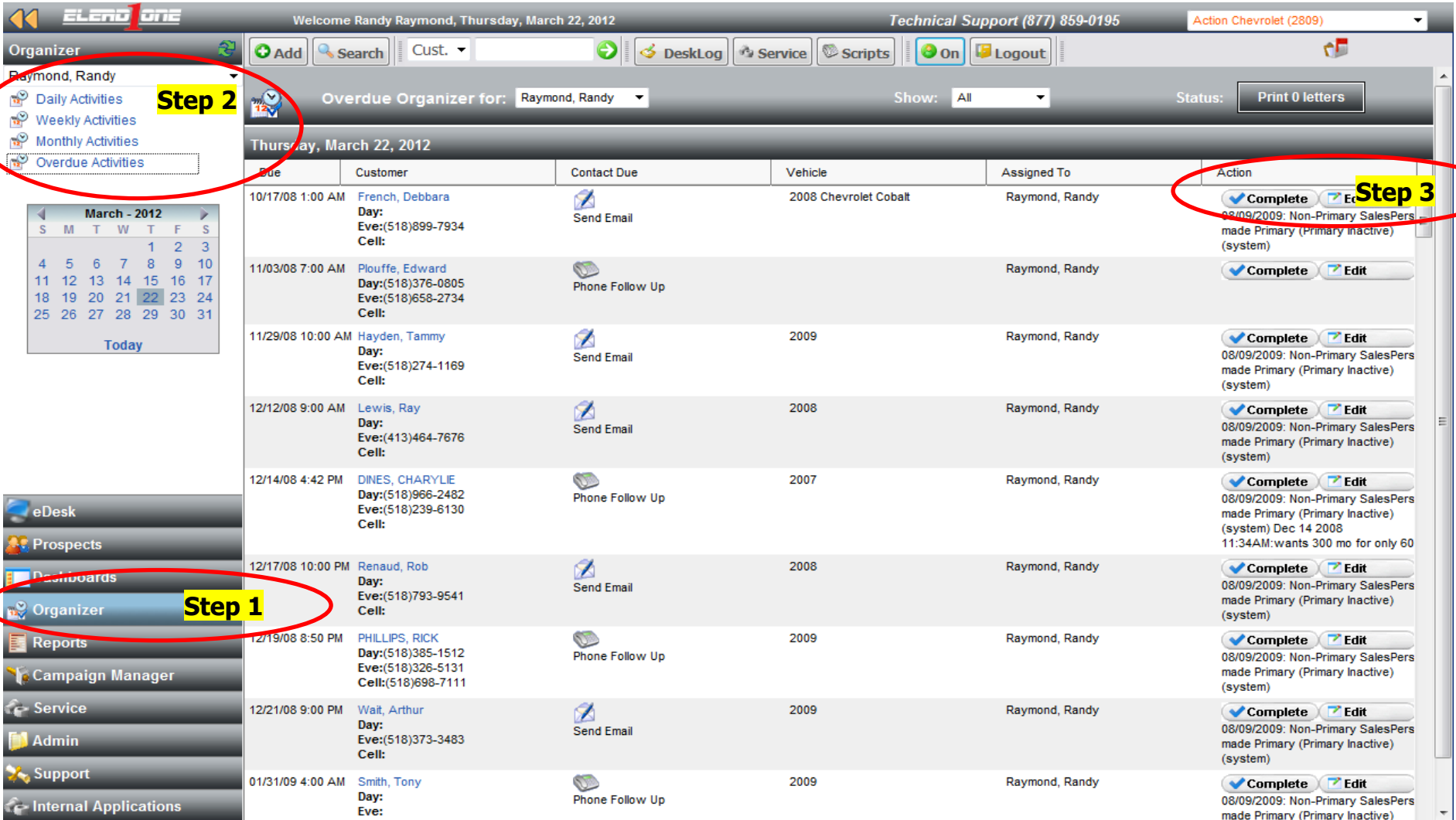
3. The Organizer, this is similar to a paper calendar or datebook organizing your schedule.

Step 1- To View the 'Organizer' click on the 'Organizer' menu tab.







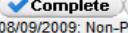

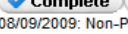





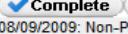

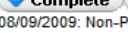

Step 2- Then, click on the 'Overdue Activities' to view your oldest scheduled uncompleted tasks.

Step 3- Click on the 'Complete' button to complete each task 

Throughout the day, Check your 'Organizer' and Click on the  button to complete the task.



The screenshot displays the ELERU ONE software interface. At the top, it says "Welcome Randy Raymond, Thursday, March 22, 2012" and "Technical Support (877) 859-0195". The "Organizer" menu is on the left, with "Overdue Activities" selected. A calendar for March 2012 is shown, with the 22nd highlighted. The main area shows a list of overdue activities for Thursday, March 22, 2012. Each activity row includes a due date, customer name, contact information, vehicle, assigned person, and action buttons. The "Complete" button is circled in red for each row, and the "Organizer" menu item is also circled in red.

Due	Customer	Contact Due	Vehicle	Assigned To	Action
10/17/08 1:00 AM	French, Debbara Day:(518)899-7934 Eve:(518)899-7934 Cell:	Send Email	2008 Chevrolet Cobalt	Raymond, Randy	 
11/03/08 7:00 AM	Plouffe, Edward Day:(518)376-0805 Eve:(518)658-2734 Cell:	Phone Follow Up		Raymond, Randy	 
11/29/08 10:00 AM	Hayden, Tammy Day:(518)274-1169 Eve:(518)274-1169 Cell:	Send Email	2009	Raymond, Randy	 
12/12/08 9:00 AM	Lewis, Ray Day:(413)464-7676 Eve:(413)464-7676 Cell:	Send Email	2008	Raymond, Randy	 
12/14/08 4:42 PM	DINES, CHARYLIE Day:(518)966-2482 Eve:(518)239-6130 Cell:	Phone Follow Up	2007	Raymond, Randy	 
12/17/08 10:00 PM	Renaud, Rob Day:(518)793-9541 Eve:(518)793-9541 Cell:	Send Email	2008	Raymond, Randy	 
12/19/08 8:50 PM	PHILLIPS, RICK Day:(518)385-1512 Eve:(518)326-5131 Cell:(518)698-7111	Phone Follow Up	2009	Raymond, Randy	 
12/21/08 9:00 PM	Wait, Arthur Day:(518)373-3483 Eve:(518)373-3483 Cell:	Send Email	2009	Raymond, Randy	 
01/31/09 4:00 AM	Smith, Tony Day: Eve:	Phone Follow Up	2009	Raymond, Randy	 

4. Completing Tasks - Below is an **Internet Lead**.

The first Activity labeled '**Current Activity**' to complete will be to send an email.

AKA; '**Stopping The Clock**'

Your system will automatically schedule the next Activity as a '**Phone Follow Up**'.

Clicking on the button '**Send Email**' will trigger completing the email (bringing up your '**Email Composer**') AND scheduling the '**Next Activity**' (which is defaulted to a '**Phone Follow Up**'). You control your schedule and **Organizer**.

Process Activity

Name: Debbara French	Work Phone:	Wanted Vehicle: New (2008-2008) Chevrolet Cobalt
Address: 38 LAKE SIDE DR	Home Phone: (518) 899-7934	Trade-In Vehicle:
MECHANICVILLE, NY 12118-3054	Cell Phone:	Email: deb1910@hotmail.com

Current Activity

Activity:* Send Email Be Back

Completed By:* Raymond, Randy

Completed At:* 3/22/2012

Status:* New

In Showroom Turned Over Write Up Demo

Comments:

Next Activity

Activity:* Phone Follow Up

Due:* 3/23/2012

06 : 00 PM

Assign To:* Raymond, Randy

Comments:

Change Current Activity
Send Email

Completed Opportunity Activity History

10/17/2008 1:04:00 AM		Active - New	WebLink - GM One Source	Raymond, R
Date Completed	Activity Type	Outcome	Comments	Completed By
12/20/2008 12:48:02 PM	Manual Email	Completed		miner, j View Edit Delete
12/8/2008 1:19:48 PM	Manual Email	Completed		miner, j View Edit Delete
10/17/2008 9:45:31 AM	Read Email	Completed		System View Edit Delete
10/17/2008 8:48:20 AM	Manual Email	Completed		Raymond, R View Edit Delete
10/17/2008 2:03:32 AM	Internet Up	Completed	Customer Day Phone: 0 Customer Night Phone: 0 Customer Address: 38 Lakeside Dr Customer City: Mechanicville Customer State: NY Customer ZipCode: 12118 Make: CHEVROLET Model: Cobalt Year: 2008 Additional Comments: Buying time frame: 30 days Payment Method: finance Down Payment: 0.00 Contact your GM Certified Internet Manager Jodi Schmidt at: ACTION CHEVROLET, SUBARU, GEO (518) 279-3400 795 HOOSICK RD TROY NY, 12180-6646 Trim: Cobalt Sport Se	Raymond, R View Edit

7. Manager Review 'T.O.' process enables the Salesperson to handoff to the Sales Manager via the **'T.O./Manager Review'**. Simply Complete a Task and assign the next task to your Manager, then change the Status to **'Manager Review'**

The screenshot displays the 'Opportunity Details' page for Rhonda Marshall. A 'Update Task' dialog box is open, showing the 'Change Current Task' section. The 'Current Task' is 'Phone Follow Up'. The 'Assign Current Task To' dropdown menu is open, listing salespeople: Patrick Porter, Nathan Bell, Micki Dabate, Thomas Finnick, Derek Langley, Mikayla McGee, Patrick Porter (highlighted), Roxie Schnoor, Phillip Scobel, and Alan Souza. The 'Date Due' is 10/2/2012. The 'Comments' field contains 'Bought elsewhere'. The 'Save' button is at the bottom of the dialog. In the background, the 'Step 1' button in the 'Action' column of the 'Completed Opportunity Activity History' table is circled in red. Other red circles and arrows point to the 'Comments' field, the dropdown menu, and the 'Save' button.

Step 2 - Salespeople- Leave Notes for your Sales Manager

Step 4 - Click 'Save'.

Step 3 - Find your Sales Manager name in the dropdown box.

Opportunity Details

eBrochure | Email | Letter | Phone | Showroom | Schedule | Worksheet | Credit App | Add Note | Print Info | Merge

CUSTOMER

Name: Rhonda Marshall
Address:
Home #:
Work #:
Cell #: (404) 501-9084
Preferred Email: No Preferred Email Address
Birthday:
Available for CallCenter:
Last Modified:
High Priority:

OPPORTUNITY + Add Trade In

Vehicle: New
Stock #:
Trade:
Sales Teams: Bell, Nathan - Primary Salesperson
UpType: Showroom Up
Source: drive by
Date/Time Due: 10/2/2012 5:47:00 PM
Sales Status: **Manager Review** ▼

Write Up Demo

Step 5 – Click on 'Sales Status', then select 'Manager Review'

Contacts | Relationships | Ins/Other | Lifetime Value | Service | Vehicles | Audit Trail

Scheduled Contact Activities

Due	Type	Assigned To	Comment	Action
10/2/2012 5:45:00 PM	Phone Follow Up	Porter, P	Bought elsewhere - Please delete	Complete Edit

Completed Opportunity Activity History

Date Completed	Activity Type	Outcome	Comments	Completed By	Action
10/1/2012 5:47:00 PM	Showroom Up	Completed	Showroom Up - Write Up customer is looking for a black on black fiat cabrio with heated seats ans soft top customer also has trade	Bell, N	View

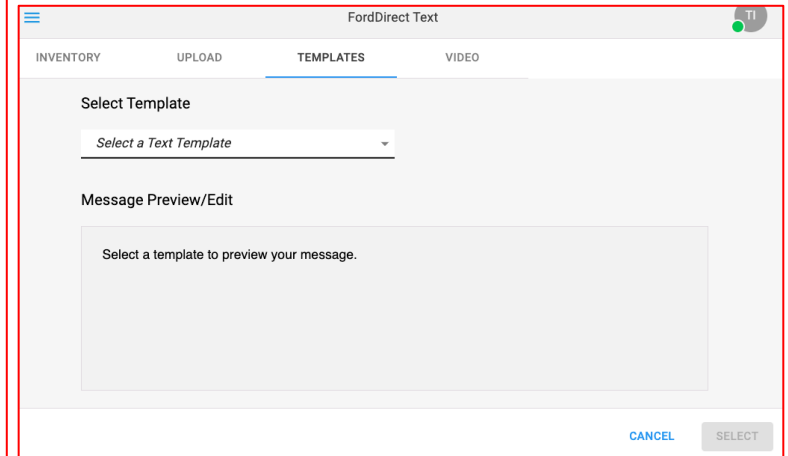
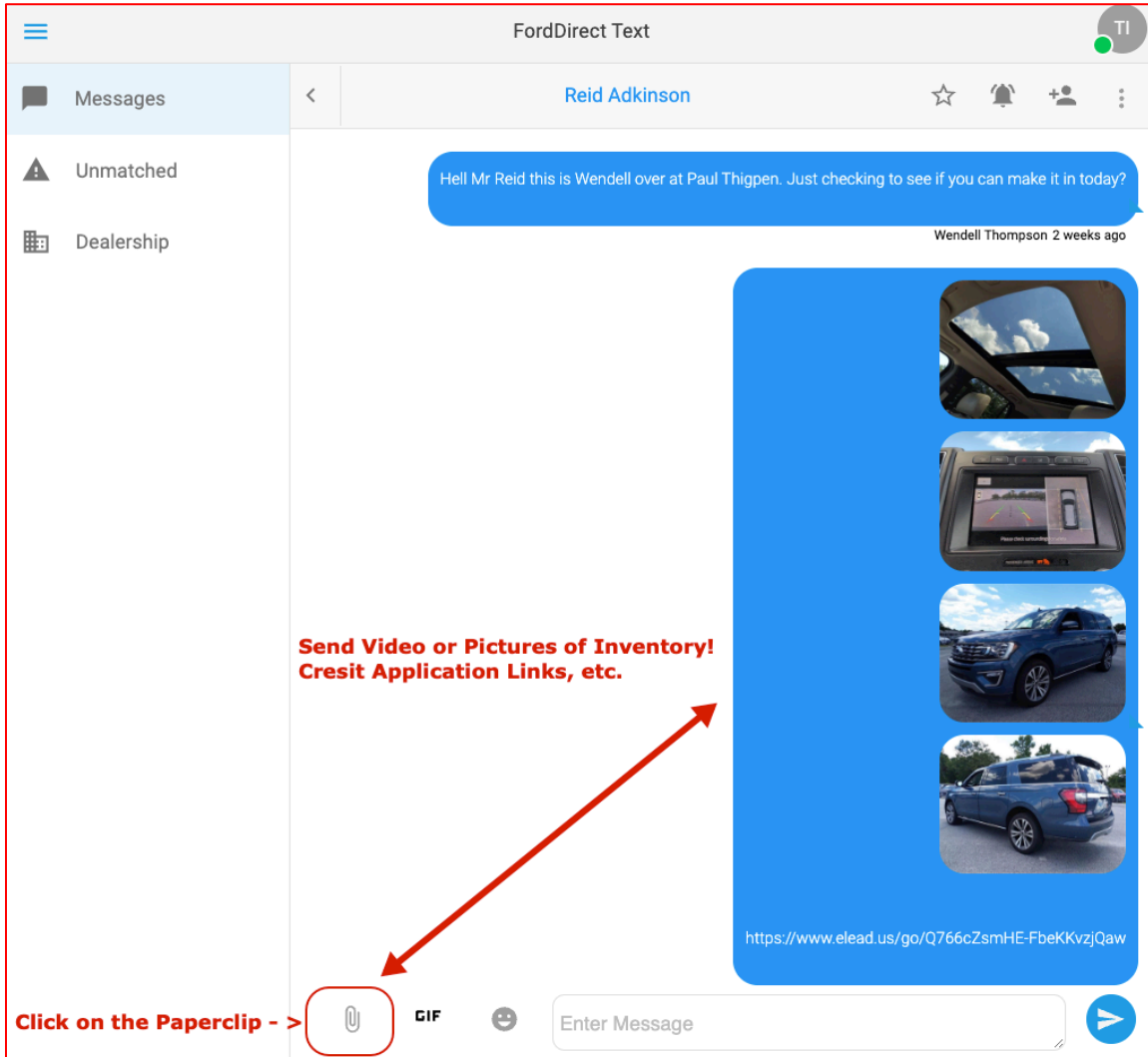
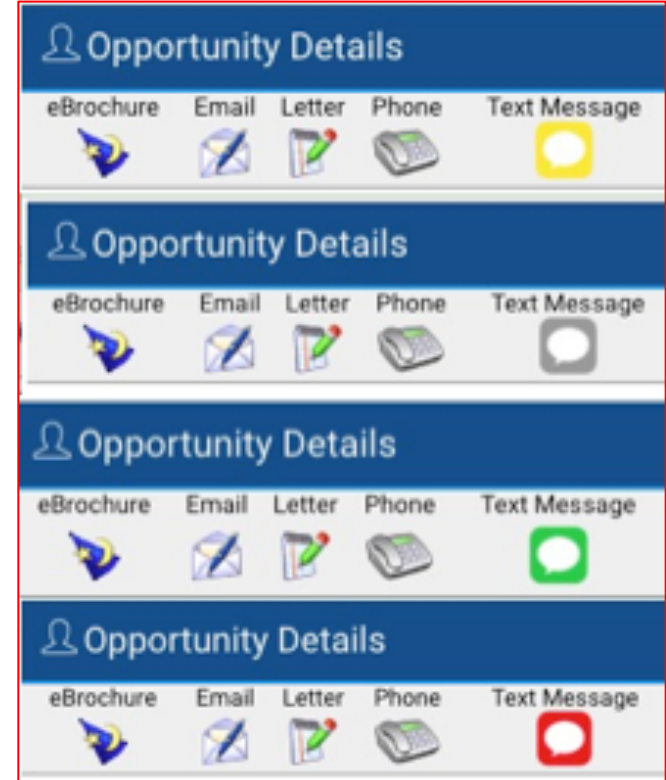
That's it ! Your Opportunity Record will be reviewed by your Sales Manager.

Text Pictures – Credit Application and more Steps and stages of texting a customer.

1 – send an Opt-In text by clicking on the Yellow Text Message Icon (icon is Yellow, then turns to Gray waiting for a response)

2 – Once your Opt-In is accepted (icon turns to green) you can send text, inventory, GIF's, credit application links and more!

Text Message stages.



Salesperson Skill Requirements

Salesperson: _____

- | | |
|--|---|
| <input type="checkbox"/> Add a Customer | <input type="checkbox"/> Text Message Customer (Pics/Video) |
| <input type="checkbox"/> Find Customers | <input type="checkbox"/> Add/Edit Wanted Vehicles -Trade(s) |
| <input type="checkbox"/> Mark In Showroom | <input type="checkbox"/> Schedule Appointment |
| <input type="checkbox"/> Add/Edit Buyer/Co-Buyer | <input type="checkbox"/> Enter a Credit Application |
| <input type="checkbox"/> Print Worksheets | <input type="checkbox"/> Print a Credit Application |
| <input type="checkbox"/> Present 9-Square | <input type="checkbox"/> T.O. to Manager Review |
| <input type="checkbox"/> Send e-mails | <input type="checkbox"/> Complete Overdue Activities/Tasks |
| <input type="checkbox"/> Send eBrochure | <input type="checkbox"/> Internet Lead-Stop the Clock |

Salesperson Signature: _____

Manager Signature: _____