

1-877-859-0195 Tech Support

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

Username: _____ Password: _____

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

First Name:
Last Name:
Business:
Email Address:
Zip:
H-Phone: 706
C-Phone: 706
W-Phone: 706 Ext:

Step 2

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

Step 3 No Match - Add New Sales Customer

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

Add/Edit Prospect


Customer Information

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

Thomas | | | leracitano | |

Street 1: 100 main street Do Not Mail: Preferred:

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: |

Birthdate: | Dealer ID: | SSN: |

Vehicle of Interest

Search 

VIN: | Mileage: |

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

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

Model: -Select- Trim: -Select-

Trade-in Information

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:

Opportunity Information

Salesperson: | Type: --Select--

BDC Agent: | Source: | Next Activity: |

Next Activity Date: 11/10/2022

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

Comments: Every 'Deal' has a story ! type your notes in here. 0 / 1500

Save Cancel

Note# 1 Click on the House

Note# 3 Click on the spy glass!

Note# 3 Enter the VIN for the trade!

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

Good eMail

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=A9BA6518F5439775050F52A65A3D3FR188ADF4965	Edit Delete
8/24/22 10:55 AM	GSM Auto Emails #7	Complete	what our next step should be		Edit Delete

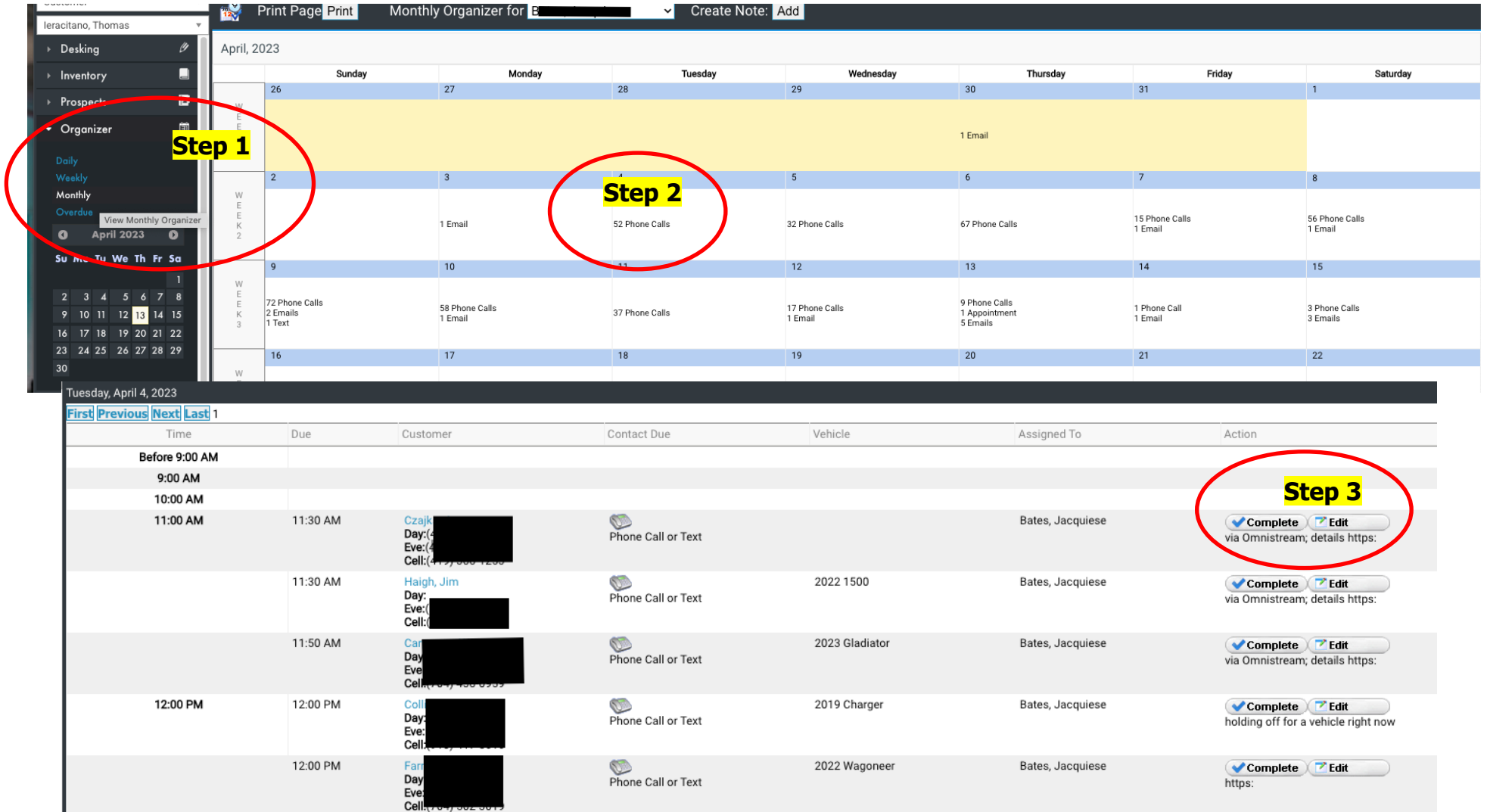
The Organizer, this is similar to a paper calendar or datebook organizing your schedule.

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

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

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

Throughout the day, Check your '**Organizer**' .



The screenshot displays the software interface for the 'Organizer' feature. On the left, a sidebar menu has the 'Organizer' option highlighted with a red circle and labeled 'Step 1'. The main area shows a monthly calendar for April 2023, with the date 'Tuesday, April 4, 2023' selected. A red circle around the date '4' is labeled 'Step 2'. Below the calendar, a task list is shown for Tuesday, April 4, 2023. The list includes tasks with 'Complete' buttons circled in red, labeled 'Step 3'. The tasks are:

Time	Due	Customer	Contact	Vehicle	Assigned To	Action
Before 9:00 AM						
9:00 AM						
10:00 AM						
11:00 AM	11:30 AM	Czajk	Phone Call or Text		Bates, Jacquiese	<input type="button" value="Complete"/> <input type="button" value="Edit"/> via Omnistream; details https:
	11:30 AM	Haigh, Jim	Phone Call or Text	2022 1500	Bates, Jacquiese	<input type="button" value="Complete"/> <input type="button" value="Edit"/> via Omnistream; details https:
	11:50 AM	Ca	Phone Call or Text	2023 Gladiator	Bates, Jacquiese	<input type="button" value="Complete"/> <input type="button" value="Edit"/> via Omnistream; details https:
12:00 PM	12:00 PM	Coll	Phone Call or Text	2019 Charger	Bates, Jacquiese	<input type="button" value="Complete"/> <input type="button" value="Edit"/> holding off for a vehicle right now
	12:00 PM	Fari	Phone Call or Text	2022 Wagoneer	Bates, Jacquiese	<input type="button" value="Complete"/> <input type="button" value="Edit"/> https:

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**.

<p>Current Activity</p> <p>Activity:* <input type="text" value="Phone call or Text"/> <input type="checkbox"/> Be Back</p> <p>Completed By:* <input type="text" value="ieracitano, thomas"/></p> <p>Completed At:* <input type="text" value="04/13/2023"/></p> <p>Status:* <input type="text" value="Manager Review"/></p> <p><input type="checkbox"/> Left Message <input type="checkbox"/> No Answer <input type="checkbox"/> Sent Text <input type="checkbox"/> Cell Number <input type="checkbox"/> Home Number</p> <p>High Priority: <input type="checkbox"/></p> <p>Comments:</p> <p>Enter notes Here - What you are doing Now!</p> <p>0 / 1500</p> <p><input type="button" value="Change Current Activity"/></p>	<p>Next Activity</p> <p>Activity:* <input type="text" value="Phone Call or Text"/></p> <p>Due:* <input type="text" value="4/13/2023"/></p> <p><input type="text" value="11"/> : <input type="text" value="15"/> <input type="text" value="AM"/></p> <p>Assign To:* <input type="text" value="ieracitano, thomas"/></p> <p>High Priority: <input type="checkbox"/></p> <p>Comments:</p> <p>Enter notes Here - What you want to do Next!</p> <p>0 / 1500</p> <p><input type="button" value="Complete Activity"/> Last Step!</p>
--	--

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'**

eleadcrm.com/evo2/fresh/eLead-V45/lead_track/eleadtoday/processtask.asp?TaskID=1021977311&loc=PInfo&loc2=PInfo&LIUID=3425194&LICID=15653

Name: Thomas Ieracitano Home Phone: (229) 251-2462 Email: ti@digitalcarguy.com
Address: Cell Phone: (229) 251-2462 Wanted Vehicle: Used (2019-) GMC Sierra 2500HD
Work Phone: Trade-In Vehicle:

Word Track

**Collect their email !
Answer the Customers Question, First!
Send a personal, meaningful response, make the human connection.**

Step 2 Click on the 'Activity Dropdown', Find 'Manager Review'.

Current Activity: Activity: Phone call or Text Be Back
Completed By: Ieracitano, thomas
Completed At: 04/11/2023
Status: Working
 Left Message No Answer Sent Text Cell Number Home Number
High Priority:
Comments: 0 / 1500

Next Activity: Activity: Manager Review
Due: 4/11/2023 11:15 AM
Assign To: Ieracitano, thomas
High Priority:
Comments: 0 / 1500

Change Current Activity Complete Activity

Step 1 - Salespeople- Leave Notes for your Sales Manager to review!

Step 4 - Click 'Complete Activity'. That is it!!!

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

leadcrm.com/evo2/fresh/eLead-V45/lead_track/NewProspects/OpptyDetails.aspx?IPID=79872026&IDID=85661589

Opportunity Details

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

CUSTOMER

Name: Thomas Ieracitano **ID:** 79872026

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

Preferred Email: ti@digitalcarguy.com
Other Email: thomas@digitalcarguy.com

Birthdate:
Last Modified: 4/12/2023 9:24:20 AM
High Priority:
Text Preferred:

OPPORTUNITY

Vehicle: Used 2019 GMC Sierra 2500HD Denali 4x4 Crew Cab 6.6 ft. box 153.7 in. WB
1GT12SEY6KF169819

Stock #: TIM11739

Trade:

Sales Teams: ieracitano, thomas - Primary Deskling Salesperson
Grainger, Patrick - Desk Manager
Coleman, Sarah - Primary BDC Agent (inactive)

UpType: Showroom Up
Source: drive by

Date/Time Due: 1/27/2023 3:15:00 PM
Sales Status: Manager Review

In Showroom **T.O.** **Demo** **Write Up**

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

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

Scheduled Activities

Delete All

Due	Type	Assigned To	Comment	Action
1/27/23 3:15 PM	Phone call or Text	Grainger, P		+ Complete Edit

Completed Activity History

Date Completed	Action	Comment	Action
11/29/22 5:16 PM	Active - Manager Review	LotTraffic - drive by	ieracitano, t N
4/06/23 12:30 PM	Prospect Email		View Edit Delete

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.

Step 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)

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

FordDirect Text

INVENTORY UPLOAD **TEMPLATES** VIDEO

Select Template

Select a Text Template

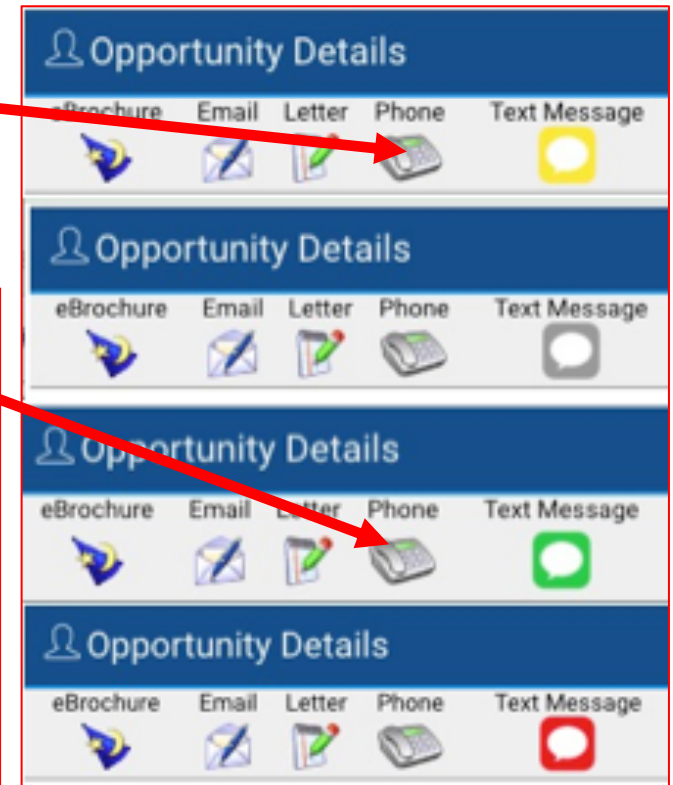
Step 1

Message Preview/Edit

Select a template to preview your message.

CANCEL SELECT

Text Message stages.



FordDirect Text

Messages

Unmatched

Dealership

Reid Adkinson

Hell Mr Reid this is Wendell over at Paul Thigpen. Just checking to see if you can make it in today?

Wendell Thompson 2 weeks ago

**Send Video or Pictures of Inventory!
Credit Application Links, etc.**

Click on the Paperclip - >

Enter Message

<https://www.elead.us/go/Q766cZsmHE-FbeKKvzjQaw>

Setting up your Text Message Alerts and Changing Your Password

Application Settings

Management Escalation Contact Email Type:
 Work Personal Notification Address

Credit Application Contact Email Type:
 Work Personal Notification Address

Skate Contact Email Type:
 Work Personal Notification Address

Pager Reply Notification Email Type:
 Work Personal Notification Address

SMS Notification Type:
 Work Personal Notification Address

- **Step 1** - click on the **Admin** button on the bottom left of the screen then,
 - **Step 2** -click on the **'CRM setup'** link
 - **Step 3** -click on **'Preferences'**
 - **Step 4** -click on **'Update'** at the bottom of the page to save changes.
- That's it ! You can turn this on/off at any time.

Choose your email type for pager reply notifications.

By checking the SMS Notifications box above, you agree to receive account notifications via SMS. Message frequency varies. Message and data rates may apply. You can text HELP at any time for assistance or STOP to cancel.

[Terms of Service](#)
[Privacy Policy](#)

[Update](#)
[Main Menu](#)

To change your password

- **Step 1** - click on the **Admin** button on the bottom left
- **Step 2** -click on the **'CRM setup'** link
- **Step 3** -click on **'Change Password'**

That's it !

Password Administration Thursday, April 13, 2023

Enter Your New Password.

All passwords must contain at least one number and one letter. Passwords must be at least five characters long, but no more than ten and cannot contain special characters.

Salesperson:

User Name:

Enter New Password:

Retype New Password:

[Change Password](#)

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 Deal Pack /Worksheets | <input type="checkbox"/> Print a Credit Application |
| <input type="checkbox"/> Present Numbers - 9-Square | <input type="checkbox"/> T.O. to Manager Review |
| <input type="checkbox"/> Send e-mails/ AutoQuote | <input type="checkbox"/> Complete/Find Overdue Tasks |
| <input type="checkbox"/> Send Video/CRM App | <input type="checkbox"/> Internet Lead - Stop the Clock |

Salesperson Signature: _____

Manager Signature: _____