

**LeadIT integration**

**CarloCRM 5.3**

## 1. LeadIT settings

During LeadIT configuration, it is necessary to define LeadIT access rights in the *Administration / LeadIT settings* area.

This offers the following configuration options:

- |                      |  |
|----------------------|--|
| Number:              | Number of accesses to download LeadIT  |
| Active:              | Enable LeadIT access   |
| Notification:        | Name of the CRM user to be informed of incoming leads with a task.   |
| XSF user / Password: | Access data for the OPEL Firewall  |
| User / password:     | User name and password for lead retrieval of the company   |
| Assignment:          | Storage location code to which the leads will be assigned in CRM   |
| Dealer:              | Dealer number (e.g., DE1000.00)  |
| E-mail:              | Overwrites the e-mail addresses information in LeadIT (persons who are directly informed by LeadIT of new e-mails) |
| Status:              | Indicates whether the access works or shows eventual error messages  |

All fields marked with (2) are related to the second establishment. The display of the number of entry options depend on the value of the first *Number* field.

At the end of the list, a GMAC dealer number is entered to issue financing requests and retrieve the corresponding response from the bank in CRM.

## 2. Lead assignment

Inquiries to LeadIT will be fetched by default automatically every 15 minutes. These will be listed under *Action/ Lead assignment*. The button *Fetch new leads* can be used to manually launch the process, for example, to retrieve status changes.

- Filter: Selection of submitted campaigns
- Type / channel: Service, sales, or GMAC
- Prospect / customer: Search for a specific record
- Import date:
- Source / Dealer:
- Status: Distinction between new and pending leads
- CC: Leads that were routed to the external call center
- Vehicle / VIN: Search for a specific vehicle

There are three options available for lead assignment:

- Adding a new customer (customer name field blank)

- automatic identification of customers with accurate name and address spelling with possibly data changes transfer (checkbox *Data overwrite*). New customers are listed with the numbers 1 to x and can be viewed here.
- manual customer search by entering customer or vehicle data (license plate and vehicle identification number) in the input field

Search: "do"			
Dobrzykowski, Ingo (4000); Koblenz - ZZB 1...1; 1_130026 00HB; 2_0test1 00HB	Doetsch, Werner (924); Silberstr. 6, Bad Soden - ZZB Markus Stumpf 1_4050, 1_4050; 1_102146 00HB	Dohr, Daniela (4287); Hohenzollernstr. 111b, Frankfurt - ZZB Markus Stumpf 1_4050, 1_4050, 1_107987 00HB	Domagalski, Gabi (3691); Raiffeisenstr. 2a, Bad Soden - ZZB Markus Stumpf 1_4050, 1_107269 00HB
Domagalski, Viktor (3806); Stellbachstr. 31, Hofheim - ZZB Markus Stumpf 1_4050, 1_4050; 1_107408 00HB	Dombrowski, Hans (5282); Amsehweg 10, Eppstein - ZZB Markus Stumpf 1_4050, 1_4050; 1_210640 00HB	Domogalla, Jennifer (1321); Schöne Aussicht 8a, Bad Soden - ZZB Markus Stumpf 1_4050, 1_4050; 1_103012 00HB	Donhauser, Toni (1162); Koblenzerstr. 45, Frankfurt - ZZB Markus Stumpf 1_4050, 1_4050; 1_102656 00HB

In the column *Action*, it will be decided how to progress the lead:

- No action: No action is taken
- Take over: Customer is assigned to the seller selected below
- Other / external link: External LeadIT site opens per customer

No.	Dealer	Campaign	Customer	Additional data	Action
1.		Opel GMAC Verträge - 210 Tage vor Vertragsablauf Date: 19.09.2011 Source: Opel, Type: sales	Doemski, Norbert Birkenweg 6, 23623 Ahrensböök Overwrite data New customer: Auto../00HB	Lead ID: 1991351 VIN: W0LOAHM759G05... Vehicle search	Admin2, Admin New No action take over No action Other/External link

### 3. Lead forwarding

Leads forwarded to a salesman can also be forwarded to another user. Therefore select a different user, chose take over and save.

### 4. Call center leads

If a lead is not processed by the dealership, it can be centrally managed and "taken away" from the dealer by OPEL. The lead is then processed by an OPEL Call center. If so, the corresponding lead is recognized and cannot be edited. This can happen in several phases.

### 5. LeadIT - CC leads

Further processing is only possible after the reassignment of a call center.

No.	Dealer	Campaign	Customer	vehicle	Interested in	Additional data	Action
1.	DE0621.00	Angebotsanfrage opel.de Date: 20.08.2009	Lenhart, Annika Hohlstr. 16, 67685 Schwedelbach Overwrite data New customer: Opel/00HB		Estimated replace date: 24.08.2009	Lead ID: 2590293 Quotation - Quotat.. Source: Opel, Type: Sales	Miller, Peter New No action ONL.: Miller, Peter External link

## 6. Display of lead information

The lead history can be directly viewed in the lead-container of the correspondence field. To directly view the current status of the leads, check the *Status* field. In addition to information on history information (new, contacts, test drive, offer, sales contract), the lead import date is also available.

## 7. Lead execution process

As described above, during the transfer of leads, it will be examined whether these are already being processed by the call center. For this purpose, a check is executed and documented.

In the current version of LeadIT, the status that the customer has opened will only be submitted to LeadIT if the seller clicks on the exclamation mark of the task in his/her PIM or on the customer correspondence.

There, the entire lead content is available.

Lead in the PIM of the salesman:

Date	Reminder	Name	Type	Subject	Description
14.05.2013 16:01	Reminder: 14.05.2013 16:01	Doemski, Norbert	all	Interest..	Source: ..
08.04.2013 14:36	Reminder: 08.04.2013 14:36	Kansy, Joachim		Interest..	Source: ..

Lead in correspondence of customer with follow-up:

No.	Date	Type	Cat.	Done	Inc./Outg.	Doc.	Subject	Description
	14.05.2013 16:01	formulars		✓ - Form	[-]	-	Neukunde Interessent	
	14.05.2013 16:01	Leads		✓ - Follow-up activity	[-]	-	Interested in	Source: Opel Date..
	14.05.2013 16:03	Leads	Link Configurator		[-]	-	Interested in	Source: Opel Date..

Click on exclamation mark:

14.05.2013 16:03 / Reminder: 15.05.2013 16:03: Interested in

Description:

Result: Not on the phone

Follow-up activity:  Not on the phone Follow-up activity

Source: Opel  
Date: 19.09.2011  
Campaign: 765 - Opel GMAC Verträge - 210 Tage vor Vertragsa

## 8. LeadIT - Correspondence entry

After a lead is finally closed in CRM (negative or positive), all customer data that was retrieved from the lead and possibly changed in CRM, is sent back to LeadIT and updated there. An extra browser-window from LeadIT will open, to add specific information needed to finally close the lead.

## 9. Uncalled leads

Go to *Action / LeadIT open leads* to view all leads for a given period and storage location, which are still in LeadIT and have not yet been downloaded to CRM.

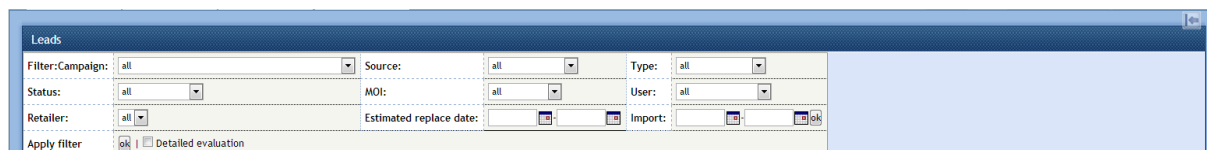
## 10. Integration of vehicle exchanges and contact forms

If previously configured by the dealership, requests from vehicle exchanges and contact requests from the company's own website are also displayed under the menu item *Action / LeadIT* with their own campaigns.

As the leads, they are distributed to the employees.

## 11. LeadIT - Report

Go to *Action / LeadIT Report* to download a report from the LeadIT portal. To that end, you must select a category, date, format, type, campaign, and the storage location. This report will be shown as a link (temp/leadreport.pdf). Click on the link to open the PDF file.



The screenshot shows a web interface titled "Leads" with a filter section. The filter section contains several dropdown menus and input fields:

Filter: Campaign:	all	Source:	all	Type:	all
Status:	all	MOI:	all	User:	all
Retailer:	all	Estimated replace date:		Import:	
Apply filter	<input type="checkbox"/> Detailed evaluation				

The report is part of LeadIT and CRM and has no influence on the design or contents of such report.