VinSolutions
VinConnect Release Notes

Release Date: February 10th, 2015
CRM Enhancements
CRM – New Leads Without Attempted Contact

- New CRM leads that haven’t had an attempted contact will now remain in the “new leads” section of a users task page (CRM -> Tasks) even if there are overdue tasks associated with that lead.

- Previously these unanswered leads would move to the overdue task section if a task assigned to them was considered overdue.
CRM – Sales Appointment Scheduled Process

- In the VinConnect sales processes (settings -> ILM/CRM settings -> Sales and Service Processes) there is a new option to create an event when a sales appointment is scheduled.

- Any of the standard follow-up events are available to be scheduled.
- Any task or event that is scheduled in this category will fire immediately when a sales appointment gets scheduled.
CRM – Deleted Showroom Visits

- A new report is available to track deleted showroom visits within VinConnect.
  - The report can be found in Reports -> CRM -> Customers -> Deleted Showroom Visits.

- The report can be adjusted to show all deleted showroom visits that were started within the given date range.
- Clicking on a customer name from this report will load the customer dashboard.
- Any deleted visits will be logged and noted in the customer notes and history.
In the new Active Leads Without Future Follow-Up view (CRM -> Leads -> Active Leads Without Future Follow-Up), you are now able to activate a custom process on the selected group of customers.

- First, select the group of customers who will be placed into the new process.
- In the “select action” menu, choose the option to “Set Custom Process”.
- Choose one of the available custom processes from the list to initiate the events in that process for the selected customers.
## Additional VinConnect Enhancements

- In the lead settings (Settings -> ILM/CRM Settings -> Lead Settings) the option is now available to trigger unresponded lead alerts and unresponded email replies alerts based on actual time or adjusted dealership hours.

- Customer birthday tasks will now populate the customer’s date of birth in the task description on the CRM task page and the customer dashboard.
Additional VinConnect Enhancements

- Hovering over the customer name in the appointments section on the manager dashboard screen will now display additional customer information.

- Users with high task counts will now only see the most recently created 300 tasks when accessing their task page. This will provide much faster page loading times for users with high task counts.

- When viewing a task page with over 300 tasks, the user will see the message: “The tasks being displayed on this page have been limited due to the high number of active tasks.”
VinDesking Enhancements
Desking Enhancements – AIS Purchase vs Lease

- When using AIS to create a new deal in desking 3.0 you will now be able to configure a different selling price for lease and purchase deals.

- Choosing to have different pricing for purchase and lease deals will create a scenario for each where pricing can be altered.
- These different prices will be reflected when comparing purchase and lease deals on the multi-scenario form.
Desking Enhancements – Multi Scenario Form Trade Evaluation

- The multi-scenario form in desking 3.0 has been enhanced to include trade evaluation information.
- This can be turned on or off by default within the proposal details tab within the print proposal settings page in desking.
- There is also an option for the trade recon items to be itemized when printing the multi-scenario form.
Desking Enhancements – Multi Scenario Form Service Contracts

- The multi-scenario form in desking 3.0 will now be able to display itemized service contract information.

- This can be turned on or off by default within the proposal details tab within the print proposal settings page in desking.
<table>
<thead>
<tr>
<th>VinCare Case #</th>
<th>Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>00651257</td>
<td>The Connecticut personal property tax will now correctly apply on a monthly basis.</td>
</tr>
<tr>
<td></td>
<td>Trade-in Evaluation information will now save after exiting the desking application.</td>
</tr>
<tr>
<td>01088765</td>
<td>Custom labels for doc and license fees will now print correctly on the quick print form in desking 3.0</td>
</tr>
<tr>
<td>01064738</td>
<td>All vehicles are now available to be selected when printing a multi-scenario form if the year, make, model and trim match that of another vehicle in the same deal.</td>
</tr>
<tr>
<td>609080</td>
<td>Global tax settings have been updated to allow the Missouri personal property tax to be added to lease deals.</td>
</tr>
<tr>
<td>667446</td>
<td>Tax settings for Washington and Idaho have been updated to correctly apply trade allowance tax credits.</td>
</tr>
<tr>
<td>1074751</td>
<td>Negative tax amounts will no longer be calculated when the value of the trade-in exceeds the selling price of the vehicle in the deal being worked.</td>
</tr>
</tbody>
</table>
Additional Enhancements & Fixes

These items have been added for your information and visibility into all items contained in the release.
### Additional Enhancements & Fixes

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<tbody>
<tr>
<td>1040486</td>
<td>After merging customer records users will be able to save changes that are made to lead information such as lead source and type.</td>
</tr>
<tr>
<td>1063471</td>
<td>Deleted showroom visits will no longer show in the results when running a custom report to view open showroom visits.</td>
</tr>
<tr>
<td>00691384</td>
<td>Trade-in ACV values will now populate correctly when printing custom forms from the trade-in screen in the customer dashboard.</td>
</tr>
<tr>
<td>00685392</td>
<td>Negative adjustments due to missing options will now correctly affect the Options Total on the KBB lending breakdown report.</td>
</tr>
</tbody>
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