

CAconnexion™ Version 1.1

RELEASE NOTES | MAY 25, 2010

OVERVIEW: CAconnexion™ is a web-based sales automation tool that allows dealerships to monitor salesmen activities. Developed off of the Splendid CRM platform, which is a market leader in CRM platforms, CAconnexion is a sales automation tool that helps a dealer:

- Enhance follow-up by tracking prospective and sold customers
- Keep salesmen accountable for their leads and sold customers
- Automatically load customer information from a dealership's DMS

CAconnexion integrates with our CAprospect™ and/or CRcontact™ products to ensure the optimal contact management program for prospects and sold customers.

PURPOSE: Version 1.1 has added enhancements asked for by our clients. Included are:

Reports:

- Added totals to all reports with subtotals by salesmen.
- Added salesman name and time of call or meeting scheduled to daily to do printout.
- Removed login status from Time Report and added "Time spent on CAconnexion" to allow management to view time spent on the system by their salespeople.

Customer Contact Pages

- Added ability to add any activity from the customer page including emails, calls, meetings, and tasks.
- Changed contact page so data can be saved and user will remain on that page.
- Changed "Order" heading to read "Vehicle Information" and "Save" button to read "Save Note".
- Added warning if entered vehicles or data is not saved before exiting page.
There is now only one save button for vehicle and contact information.
- Added a message to confirm that save has been completed.
- Fixed tab sequence in contacts page to logical zig-zag, left to right pattern.
- Added ability to list multiple vehicles on customer page.
- Disabled all fields that cannot be deleted.
- "New" button on all screens is now in red so it is more pronounced and easier to find.
- Changed customer default sort from first name to last name.
- The payoff amount is now a dynamic calculation and is always up-to-date.

Dashboard

- Removed all hyperlinks under all activities except for emails.
- When on a page other than page 1, user will now remain on that page after performing a status change or other task.

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RELEASE NOTES *continued*

Email Page

- Added ability to send emails to multiple customers and have the emails automatically linked to each customer emailed.
- Removed the “Select” contact page information.
- Emails will now show the name of the dealer as the sender.
- Added the ability to search emails sent by subject and contact.

Login Page

- Changed “forgot password” function to email the new password directly to the user.

Meeting Page / Calendar pages / Task page / Call Page

- Changed display of meeting or call times to show 15-minute breakdown.
- Added the customer name and removed the name of the communication piece in MyCalendar weekly and monthly views.
- Added ability to search manually-entered meetings, tasks, and calls by subject and contact.

Data Migration to Dashboard

- Warranty and service letters will no longer be visible on salesman dashboard.
- Salesman thank yous added to dashboard.
- Only one birthday per customer will be visible on the dashboard, even if there are multiple vehicles.

END-USER IMPACT: The enhancements made in Version 1.1 will be an improvement to usability of the product. No installation or other actions are needed by users.

CONTACT: For support call your service representative or the Customer Management Systems™ Help Line at 800-842-1820.