

CAconnexion™ Version 3.2

Release Notes | December 27, 2011

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 3.2 has added enhancements asked for by our clients. Included are:

- 1) Managers with "admin" credentials will be redirected to the MyCustomers page instead of the dashboard. This will allow all Managers a quick access to all prospects entered by the sales staff.
- 2) The Dashboard will now contain a "Mark as Completed" link replacing the check box. Users will find faster functionality once a task is completed.
- 3) A new My Appointments link replaces the Meeting Manager link. Users can easily and quickly create and manage appointments.
- 4) Quick links have been moved to a fly out drop down, for a better user experience. This new access will contain the following:

My Customers	My Appointments	My Calls	My Tasks
My Email	My Reports	My Calendar	
- 5) A new custom field called Prospect Rating has been added for your CRM contacts. All users can better manage their prospects with this feature. It will contain the following values:

1 – Hot	2 – Warm	3 – Cold	4 – Dead	5 - Sold
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- 6) The following sortable and searchable fields will be made available in your My Customer list in the following order:

Rating	Date	First Name	Last Name
Make	Model	Cust. Type	Pur.Type
Lease Exp. Date			

- 7) The list screens for My Appointments, My Calls, and My Tasks will have the following search fields:

Rating	Date	First Name	Last Name
Make	Model	Cust. Type	Status

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