

Eck Auto Group Internet / Business Development Training Checklist

Name: _____

Vin User: _____

Vin Password: _____

Vin #: _____

Gmail: _____

- Setup On Teams
- ADP Time Clock
- Chat
- Tour Building
- Confirm AutoFi Account

CRM Training

- ADP Time Clock
- Login To Vinsolutions Setup
 - Opt-in to receive notifications.
- Signature Created
- Setup Vin Schedule I will check out for lunch.
- Schedule (+30 -30)
- REVIEW TOOLBARS


- Review Daily Planner
- Review Lead Checklist
- Add Customer New Add To Existing
- Change Address / Phone / Rep / BDC
- Read Lead Click Link Read ADF
- Notes W.H.Y
- Find Duplicate Lead
- Find Previous Sold
- When is Merge needed?
- Make sure the number is in Cell Phone *(Templates)*
- Vehicle Of Interest Add Stock # *(Templates)*
- Understand UVI /PDI Location of vehicle
- Review BDC Tracker
 - Add Lead Assign Lead BDC Task 1&2
- Send Text Opt-in
- Send Email Opt-in
- Templates Text Email
- Digital Retailing Tool *(AutoFi / Fast Lane)*
 - Login Portal Dealer Website
- Change Custom Status
- Make A Call In The System *(See General Also)*
- Understanding Task *(See Reports)*
- Appointment Set Confirm
- Alerts
- Search Customer Top Right Recent Advanced
- Search Inventory Top Right Recent Advanced
- Inventory UVI PDI Lot Where Is It Located
- Advanced Search
 - # Stock# Name
 - Active Sold
- Add Trade
- DNCL Internal National
- Wishlist Assign Expiration Date 6 months
- Service Tabs

Autofi
User: _____

Password: _____

Chat/TradePending Login
User: _____

Password: _____

OEM Login
User: _____

Password: _____

Reports

- Duplicate Report
- Active Task Report
- Non-active Task Report
- Morning Leads Report Import Leads

BDC Tracker

- Appt X or 1 Clean Red Daily Not over 10 days
- Lead Tracker No Red By The End Of The Day
- Schedule

Notes: Cntrl SHIFT V (Paste without formatting)

Phone Scripts

- Call Structure
- Availability Script
- Known Vehicle

Make A Video

- Record Upload User Added To TradePending

General

- Phone: Answer Hold Transfer Voice-mail
- Voicemail Password _____
- HR Meeting
- Attendance / Callins / Lunches
- OEM Certified Associate Professional
- <https://tinyurl.com/app> web page shortener

I feel comfortable with the areas marked completed on this checklist and ready to work with live leads.

Rep

I have inspected this checklist, and I certify that we are ready to start working with live leads. _____ Manager Initials

