CRM/ILM ACCESS

CRM/ILM ACCESS	SALES	MANAGER	ADMIN
1. CRM TAB:	[blue]	[red]	[yellow]
A. DASHBOARD			
1. SHOWROOM ACTIVITY		[red]	[yellow]
2. DESK LOG		[red]	[yellow]
3. SOLD LOG	*Only if checked in user profile to mark customers sold.*	[red]	[yellow]
4. MESSAGE LOG		[red]	[yellow]
5. TRADE LOG		[red]	[yellow]
6. LAUNCH KIOSK		[red]	[yellow]
7. MY MOTOFACTORY		[red]	[yellow]
8. ADVANCED DESKING	*Only if checked in user profile to desk deals.*	[red]	[yellow]
9. LAUNCH CREDIT APP KIOSK		[red]	[yellow]
B. RECENT	[blue]	[red]	[yellow]
1. VIEWED CUSTOMERS	[blue]	[red]	[yellow]
2. VIEWED DEALS		[red]	[yellow]
3. ROUTE ONE		[red]	[yellow]
4. DEALER TRACK		[red]	[yellow]
5. DMS PUSH		[red]	[yellow]
C. TASK	[blue]	[red]	[yellow]
D. CALENDAR		[red]	[yellow]
E. EMAIL		[red]	[yellow]
F. LEADS *	*	[red]	[yellow]
1. SERVICE LEADS *(IF CHECKED FOR SERVICE DEPT IN USER ID)*	*	[red]	[yellow]
2. PARTS ORDER LEADS *(IF CHECKED PARTS DEPT UNDER THE USER ID)*	*	[red]	[yellow]
3. LEAD BUCKET *(IF DEALER USES A LEAD BUCKET)*	*	[red]	[yellow]
G. ADD CUSTOMER		[red]	[yellow]
H. CUSTOMERS		[red]	[yellow]
1. SEARCH	[blue]	[red]	[yellow]
2. SOLD CUSTOMERS	[blue]	[red]	[yellow]
3. RECENT OPPORTUNITIES	[blue]	[red]	[yellow]
4. RECENTLY CONTACTED	[blue]	[red]	[yellow]
5. NOT RECENTLY CONTACTED	[blue]	[red]	[yellow]
I. DISTRIBUTION	[blue]	[red]	[yellow]
J. MORE		[red]	[yellow]
1. WEBSITE FINANCE APPS		[red]	[yellow]
2. LETTERS		[red]	[yellow]
K. LINKS	[blue]	[red]	[yellow]
2. INVENTORY TAB – ACCESS OPTIONS ARE DIFFERENT SETTING IN ADVANCED USER SETTINGS.	*Only if access other than salesperson for inventory.*		
3. REPORTS – ACCESS TO ALL REPORTS IN THE SYSTEM	*Only if access to inventory higher than salesperson and only for Inventory Reports.*	[red]	[yellow]
4. SETTINGS		[red]	[yellow]
A. MY SETTINGS	[blue]	[red]	[yellow]
B. USERS		[red]	[yellow]
1. USER LIST		[red]	[yellow]
2. RECENT LOGINS		[red]	[yellow]
3. TIME CLOCK MANAGEMENT		[red]	[yellow]
4. MANAGE USER GROUPS		[red]	[yellow]
C. WEBSITES		[red]	[yellow]
1. MANAGE WEBSITES – ACCESS HAS TO BE SET IN WEBSITES		[red]	[yellow]
2. FINANCE APPS		[red]	[yellow]
3. DEALER VIDEOS		[red]	[yellow]
D. DEALER HOURS		[red]	[yellow]
E. ILM/CRM SETTINGS			[yellow]
1. LEAD ASSIGNMENT			[yellow]
2. LEAD SETTINGS			[yellow]
3. ADD CUSTOMER SETTINGS			[yellow]
4. CUSTOMER ASSIGNMENTS BY REP			[yellow]
5. LEAD SOURCE LIST			[yellow]
6. TEMPLATES			[yellow]
7. EMAIL STATIONERY			[yellow]
8. LETTER STATIONERY			[yellow]
9. LETTER SETTINGS			[yellow]
10. SALES PROCESSES			[yellow]
11. SALES GOALS			[yellow]
12. DESKING SETTINGS			[yellow]
13. TASK COUNT LIST			[yellow]
14. DEALER VIDEOS			[yellow]
15. MANAGE HYPER LINKS			[yellow]
16. RO OPCODES			[yellow]
17. ROAD TO THE SALE			[yellow]
E. SALES GOALS – ONLY IN THE MANAGER ACCESS ADMIN IS UNDER ILM/CRM SETTINGS		[red]	

INVENTORY ACCESS

INVENTORY ACCESS	SALESPERSON	INVENTORY MANAGER	ACCOUNT MANAGER
SEARCH FROM UPPER RIGHT OF SCREEN (NO INVENTORY TAB)	[blue]	[red]	[yellow]
INVENTORY FROM CUSTOMER DASHBOARD (NO INVENTORY TAB)	[blue]	[red]	[yellow]
INVENTORY TAB:		[red]	[yellow]
1. INVENTORY DASHBOARD		[red]	[yellow]
2. MANAGE INVENTORY		[red]	[yellow]
A. INVENTORY VIEWS		[red]	[yellow]
B. BATCH PRICE EDIT		[red]	[yellow]
C. REMOVED INVENTORY		[red]	[yellow]
D. VIEW CARFAX REPORT		[red]	[yellow]
E. RECENT UPLOADED VIDEOS		[red]	[yellow]
3. TRADE APPRAISAL		[red]	[yellow]
4. BUYERS GUIDE BACK		[red]	[yellow]
5. EBAY FUNCTIONS		[red]	[yellow]
A. ACTIVE LISTINGS		[red]	[yellow]
B. SOLD LISTINGS		[red]	[yellow]
C. EBAY SETTINGS		[red]	[yellow]
D. SAMPLE LISTINGS		[red]	[yellow]
REPORTS TAB		[red]	[yellow]
1. INVENTORY REPORTS ONLY		[red]	[yellow]
SETTINGS TAB:			[yellow]
1. DEALER SETTINGS			[yellow]
A. IP SECURITY			[yellow]
B. INVENTORY SETTINGS			[yellow]
2. MY SETTINGS			[yellow]
3. USERS			[yellow]
A. USER LIST			[yellow]
B. RECENT LOGINS			[yellow]
C. TIME CLOCK MANAGEMENT			[yellow]
D. MANAGE USER GROUPS			[yellow]
4. WEBSITES			[yellow]
A. MANAGE WEBSITES			[yellow]
B. FINANCE APPS			[yellow]
C. DEALER VIDEOS			[yellow]
D. TESTIMONIALS			[yellow]
5. DEALER HOURS			[yellow]
6. BILLING			[yellow]
A. INVOICES			[yellow]
B. ACCOUNT ACTIVITY			[yellow]