**Setting up a CRM or ILM** (using Bayshore C/D/J #3355 as a CRM example)

In Motosnap

Admin tab

Selected Dealer

CRM Admin Settings

System Settings

Click both boxes:

* ILM Enabled
* Full CRM Enabled

*Note: Clicking both boxes is for CRM ONLY! Click only ILM Enabled for ILM ONLY!*

Desking Settings

Click appropriate desking settings.

Desking – (Desking Light Project Piece) they can work deals within our system, but can’t push them anywhere.

Basic Desking with pushes – **DO NOT USE!**

Advanced Desking –They can push deals to Route One, Dealer Track and Their DMS.

Import Settings

**DO NOT** check mark the box for Import DMS Sales Data. The IM (Implementation Manager) will do that.

Import Start Date – Go back 5 years from current date, because we import 5 years of sold data.

Email Settings

- Creating email is based on website URL (example: [www.bayshorechryslerjeepdodge.com](http://www.bayshorechryslerjeepdodge.com))

1. System Email will be bayshorecjd.motosnap.com
2. Click register and DOMAIN ADDED will appear.
3. Copy address from the ADF Email Address starting at the @ symbol and then paste into domain exclusion box. SAVE (top right hand corner)

Admin tab

Support 2

Websites

(Default) >> Web Site

Type in dealership name and click +Add

~*This will take you to the website setup page~*

- Type in dealership name in Title: (ex. Bayshore Chrysler Jeep Dodge)

1. Check mark , Force AdvancedSearch2
2. Check mark, Use out to bath for no photo image:

Dealers tab

Click drop down and type in dealership name and click +Add

Domain Names tab

The domain name will be the dealership and then followed by .vinmanagersites.com

* + Example: bayshorecjd.vinmanagersites.com
  + Click +Add
  + Click Save

*~Hover over Support 2 and click on Copy Processes~*

Copy Processes

1650 is the ILM Template Account

1651 is the CRM Template Account

1. Copy From Dealer # (Use appropriate number for ILM or CRM here)
2. Copy To Dealer # (Use VinSolutions Dealer ID # here)
3. Click Select CRM – this will select all sales processes.
4. Click Copy Processes & Templates then Click Confirm and do it already!

Settings tab

ILM/CRM Settings tab

Templates

Manage Templates

*Scroll to the bottom of the page and click* Copy Templates *located on the left.*

Copy Templates

MotoSnap CRM Templates

Copy from: -or- Motosnap ILM Templates

Click both boxes for ***Copy Categories*** *and* ***Prevent Template Duplication***and Copy

Settings tab

Dealer Settings

Dealer Hours

~ Copy and paste dealer hours. SAVE

Setting tab

Dealer Settings tab

Inventory Settings

~Scroll to the bottom and on the bottom right checkmark the box ***Hi Res Enabled:***

~**SAVE**

Click Dealer Settings to go to the dashboard

1. Change ***Setup Status:***from New or Unknown to In Setup
2. ***DMS Name:*** Insert Appropriate DMS

Click *Main tab*

**Basic Information**

Verify phone numbers and enter dealers website (must use http://)

**Inventory Gallery Settings**

Fill in the following information:

Used ADF Leads Email: leads@bayshorecjd.motosnap.com

New ADF Leads Email: leads@bayshorecjd.motosnap.com

*It will always be* [*leads@....dealer.....motosnap.com*](mailto:leads@....dealer.....motosnap.com)

Click *Exports* tab. Exports are found in the Welcome Packet under Predefined Exports.

1. Click + next to all the (Free) vendors.
2. Click + to all of the dealers vendors.

**DO NOT ENABLE!**

Click *Billing Setup* tab

Enable the 4 checkboxes under the *Payment Type:* on the right.

* Auto decode used vehicle equipment
* Auto decode new vehicle equipment
* Enable Stock Photos across the system
* Enable Color Matched Stock Photos

Click Save (top right hand corner)

Websites tab

1. Click name of dealership in the upper left corner
2. Copy the entire address under the ***ADF Lead Email*** (ex. leads@ dealership.motosnap.com)
3. In the left column under ***Email*** paste the ADF Lead Email into boxes; ***General, Employment App*** and ***Body Shop***. In the right column, paste address in all boxes **except** the boxes denoted by n/a. **SAVE**

Settings tab

ILM/CRM Settings tab

Lead Settings

Email Links tab

Open a separate tab for the Dealer’s website

Copy and paste web links to the boxes.

* If a specified page is not found use the homepage URL.
* DO NOT complete Custom 1-3.

**SAVE – Yes, you want to permanently save these changes.**

Admin tab

Selected Dealer

Forms

**Forms** (forms are found in the welcome packet under Standard Forms)

* Select the form by clicking Edit and then click *Allow the current dealer to use this form?*
* **SAVE**
* If it is saved it will read *Yes* under *Avail To Dealer.*

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_