



ONLINE SHOPPER & Automatic Training Guide

Welcome to Online Shopper & Automatic!

In this Guide, you will learn how customers can experience our modern retailing product, Online Shopper, and how you can work the deal through Automatic!

[Join our Live Workshop!](#)

We wanted to make our Guide as interactive as possible! The following icons will appear throughout this Guide, so we want to introduce you to them here!



Home

Click the home button to navigate back to the Table of Contents (located on the next page). From the Table of Contents, you will be able to quickly view new sections.



How-To Summary

Look for our How-To's for a brief summary of specific features within Conversations!



Play a Video!

When you see this icon, follow the link to watch a video!



Best Practices

How to is important, but we didn't want to leave out the strategy!



Check Your Knowledge

We've set up knowledge checks along the way for you to test your know-how!

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Click the Titles Below to Navigate to That Section! 

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Click each section above to dive directly into a topic,
or start scrolling  to explore all that Automatic has to offer!

Customer Experience



Meet our shopper, Brooks. 🙌

Brooks is browsing your site looking for a car from his couch! Before contacting you he can select his favorite model, add upgrades, and adjust parameters to discover payment options!

From your website, your shoppers can add inventory to their garage to compare prices, add upgrades, and select the right bank rate offer for them.

When a customer clicks View Payment Options, this will prompt them to start their own garage.

The customer will then be asked to add in the following personal information: First & Last Name and either Phone Number or Email.

They will receive a Garage PIN via SMS or email (depending on the information they provided).



New 2022
Honda HR-V Lx AWD

YOUR PRICE IS LOCKED

- Exterior: Crystal Black Pearl
- Interior: Black

KEY FEATURES:



GET EPRICE

SHOW PAYMENT OPTIONS

Unlock Your Lowest Payments

Get Real-Time bank Offers On Your Payment

Compare Customized Payments vs. Similar Vehicles

Submit Instant Credit App & Skip The Paperwork

Your Name
Whose garage is this?

Your Garage Key
Come back to your customized payment offers anytime, on any device

Text Email

OPEN GARAGE

By clicking here, you authorize HONDA DEMO and its sellers/partners to contact you by texts/calls. We may include marketing and be by autodialer. Calls may be pre-recorded. You also agree to our Terms of Use and Privacy Statement. Consent is not required to purchase goods/services. [Terms of Use and Privacy Statement](#)

Already have a garage? [Sign In](#)

Enter Garage Key Code

We just texted the code to

1

UNLOCK GARAGE

[Hm...can you send again?](#) [Whoops, I entered the wrong information](#)



Customer Experience

Customized Payment

Adjusting the information shown right allows you to see an updated estimated monthly payment at the top of the window.

Customers can update:

- Payment Type
 - Finance
 - Lease
 - Cash
- Zip Code
- Term Length
- Annual Miles (if Lease is selected)
- Amount Due at Signing
- Credit Rating
 - They have the option to click “Don’t know your score?” to determine their credit score
- Trade In Information
 - A customer can manually enter an estimate



Trade-In Questions

The customer will be prompted to input their vehicle, the miles on that vehicle, how much they owe on the trade-in, and what condition the vehicle is in.




Customer Experience


Brooks's Garage

Payment Settings

Garage Settings



powered by ONLINE SHOPPER




New 2022 Honda HR-V Lx ...
3CZR06H37NM726594

\$409.48/month

May include estimated taxes and fees

EXPLORE MORE

★★★★☆




New 2022 Honda Civic Ha...
19XFL2H81NE005276

\$282.54/month

May include estimated taxes and fees

EXPLORE MORE

★★★★★



New 2022 Honda HR-V Sp...
3CZR06H15NM726351

Est. Total \$27,921.65

May include estimated taxes and fees

EXPLORE MORE

★★★★☆

+
Add a Vehicle to Compare

YOUR DEALS				
Your Base Price	\$24,145.00	\$25,510.00	\$26,095.00	
Payment Type	Finance	Lease	Cash	
Term	60 months	36 months	—	
Lease Mileage	—	12000 miles	—	
Amount Due at Signing	\$2,415	\$2,000	—	
Trade In Value	\$0	\$0	\$0	
Best Bank Offer	1.90%		—	
Upgrades	\$0.00	\$0.00	\$0.00	

In the Garage

Click “Add a Vehicle to Compare” to return to VRP and select another vehicle to add to your garage.

Within their garage, customers can:

- Compare payments side by side
- Click the stars to rank your vehicle in order from most to least favorite

Once in their garage, they can adjust their deal by clicking in the respective fields based on their Payment Type:

Finance

- Term
- Amount Due at Signing
- Trade In Value
- Best Bank Offer
- Upgrades

Lease

- Term
- Lease Mileage
- Amount Due at Signing
- Trade In Value
- Upgrades

Cash

- Trade In Value
- Upgrades



Customer Experience

Payment Settings

By clicking Payment Settings, customers can:

- Update their zip code
- Adjust their credit rating
- Find their credit score by clicking “Don’t know your score?”

This will change the monthly payment on all saved vehicles within the garage.

Garage Settings

By clicking Garage Settings, customers can:

- Sign Out
- Delete Garage

Customize All Payment Options

Adjust your preferences to change monthly payments on all saved vehicles in your garage.

Zip Code 60540
Look correct? This is our best guess based on your dealer.


Credit Rating Excellent Credit

550 600 650 700 750 800 850

[Don't know your score?](#)
Find your credit without impacting your score.

Brooks's Garage

- [Payment Settings](#)
- [Garage Settings](#)
- [Sign Out](#)
- [Delete Garage](#)



New 2022 Honda HR-V Lx ...
3CZRU6H37NM726594

\$409.48/month
May include estimated taxes and fees

[EXPLORE MORE](#)

★★★★★

HONDA

powered by **ONLINE SHOPPER**

YOUR DEALS	
Your Base Price	\$24,145.00
Payment Type	Finance ▼
Term	60 months ▼
Lease Mileage	—
Amount Due at Signing	\$2,415 ✎
Trade In Value	\$0 +
Best Bank Offer	1.90% + <small>Bank Financial Services</small>
Upgrades	\$0.00 +



Customer Experience

Step 1: Quick Credit App
To confirm your custom payment of \$282.54 / month, you just need to complete a credit application at the dealership.

Step 2: Vehicle Customized!
You decided on upgrades to personalize and protect your vehicle.

Step 3: Schedule Delivery or Pickup
Almost there! Let us know when you'd like to get your new ride, and review any items we will need before handing you the keys.

Final Steps

Click **Explore More > Continue Deal Online**

1. Get Credit Decision
 - Complete credit application or skip for now
2. Add/Edit Upgrades
 - Select upgrades for the vehicle or opt out
3. Edit Appointment
 - Choose a date and time range for an in person appointment

Customers can also choose to:

- Reserve a Vehicle
- Request Test Drive

Request Test Drive

The best way to choose the vehicle that's right for you is to get behind the wheel yourself.

Who Are You
Brooks Meyer

Preferred Contact Method
 Phone Email
 (708) 743-6625

Request an Appointment
 Pick a Date Pick a Time

Request Test Drive

By clicking here, you authorize HONDA DEMO and its sellers/partners to contact you by texts/calls which may include marketing and be by autodialer. Calls may be pre-recorded. You also agree to our Terms of Use and Privacy Statement. Consent is not required to purchase goods/services. Terms of Use and Privacy Statement

Reserve Vehicle

This vehicle is currently available to other shoppers, so if you're starting to get serious about it just let us know and we'll hold it for you for 48 hours!

Who You Are
Brooks Meyer

Contact Information
Email (708) 743-6625

Comments
Add additional comments
0 / 255 characters

RESERVE VEHICLE

By clicking here, you authorize HONDA DEMO and its sellers/partners to contact you by texts/calls which may include marketing and be by autodialer. Calls may be pre-recorded. You also agree to our Terms of Use and Privacy Statement. Consent is not required to purchase goods/services. Terms of Use and Privacy Statement





Check Your Knowledge

It's time to check your knowledge to see how you're doing!

1. To start a garage, a customer needs to click:
 - a. Create Garage
 - b. Make a Garage
 - c. Show Payment Options
 - d. Start Here!
2. What can customers do in their garage?
 - a. Compare payments side by side
 - b. Rank vehicles by awarding stars
 - c. Change the payment type from finance to cash
 - d. All of the above
3. To delete their garage, a customer should click...
 - a. Garage Settings
 - b. Payment Settings
 - c. More Options
 - d. The X in the top, right-hand corner
4. Which is not a step in continuing the deal online?
 - a. Add / Edit Upgrades
 - b. Get Credit Decision
 - c. Reserve Vehicle
 - d. Edit Appointment
5. What is the Garage PIN?
 - a. A code that can only be sent via SMS
 - b. A 5 digit code to unlock their garage via SMS or email
 - c. A code that can only be sent through email
 - d. A customer created password

Review

What we covered in this section:

Customer Experience of Online Shopper

Check your answers at the bottom of the page... how'd you do?

"I got them all right!"

Move on to the next section

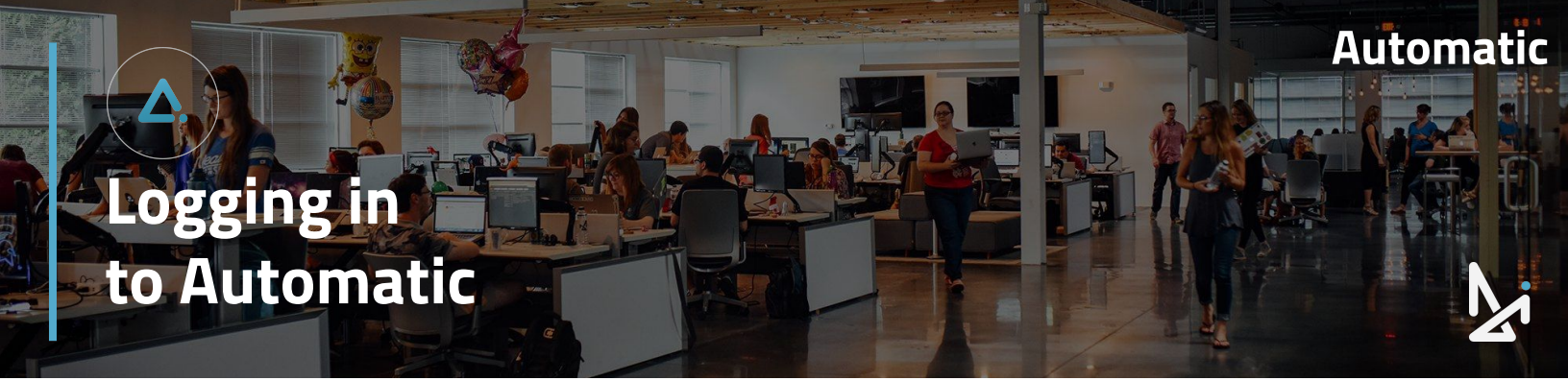
"I missed a few."

It might be good to review what you missed

"I missed most, if not all of them."

Review the content linked above





Logging in to Automatic



Meet Joe! Joe new at his Dealership, DI Motors, and has just been set up with a login for Automatic. In Automatic, he's able to access the garage made by customers like Brooks. Once he accesses a garage, he can work the deal and engage the shopper along the path to purchase.

To log in to Automatic, visit:

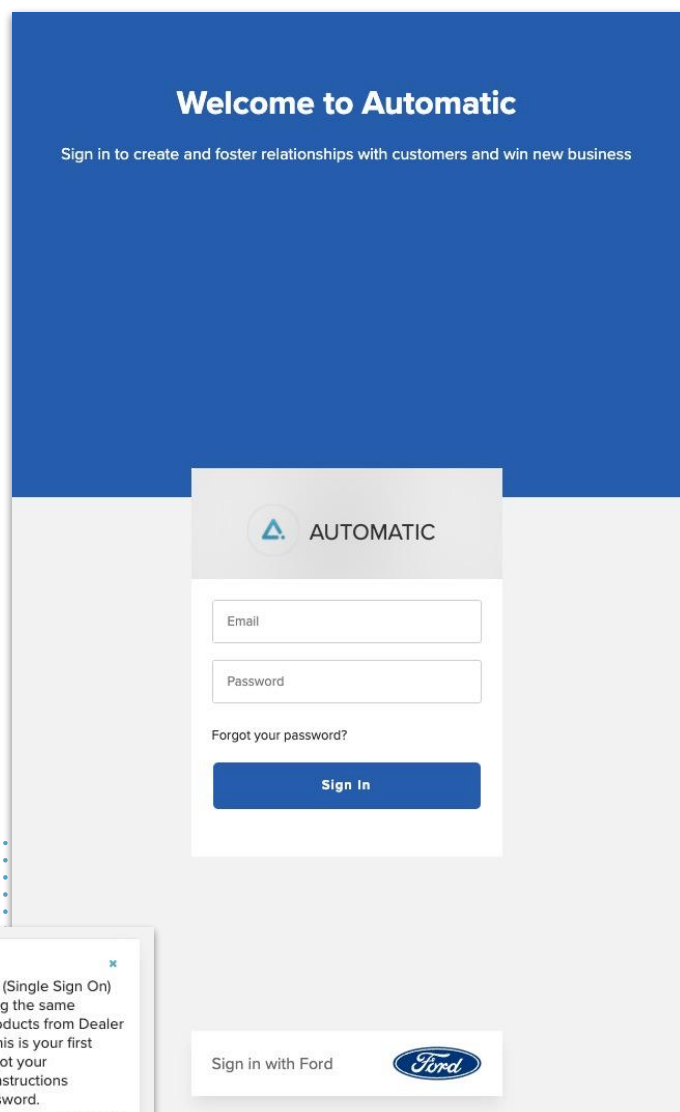
<https://automatic.dealerinspire.com>

If you've already been added as a user, your login will be your email address, and you can enter your password in the field below.

If you forgot your password, click "Forgot your Password", and you will receive a notification email to reset it.

If you have not been enrolled as a user, email onlineshoppersupport@dealerinspire.com so our team can create an account for you.

Once created, Online Shopper will email you to activate your account.



NEW Single Sign On

Automatic has now integrated SSO (Single Sign On) with CARS! You may now login using the same credentials used on many other products from Dealer Inspire, DealerRater, and CARS. If this is your first time, then you'll need to click "Forgot your password?" above and follow the instructions emailed to you to setup a new password.

2021-07-27

Best Practice:

Bookmark the URL! ☆

... to easily navigate back each time you log on!

Automatic does offer Single Sign On



Home Screen Navigation

Select a Dealership



Joe has successfully logged in to Automatic! 🎉

Before he can start viewing deals, he will need to select a specific dealership for whose deals he wants to view!

Once logged in to Automatic, if you are a Group Admin and have multiple dealerships within your auto group, you will see a dealership listings page when you login.

If this is the case, you will need to select a dealership before viewing any deals.

To select a dealership:

1. Click No Dealership Selected
2. Search for or scroll to find the Dealership for whose deals you would like to view
3. Select a Dealership

Once a dealership is selected, you will have the option to select Deals and Customers for that dealership.

The screenshot shows the Automatic web application interface. The top navigation bar is blue and contains the Automatic logo, a notifications bell, a dropdown menu currently set to "No Dealership Selected", and a user profile for "Joe Smith". Below the navigation bar, there is a sidebar with "Deals" and "Customers" options. The main content area features a "Filter" button and a "Search Dealerships" input field. A table lists several dealerships:

Dealer Name	Slug	Group	Brand	En
Chevrolet Demo	chevydemo	Demo Group	Chevrolet	En
	chevycanadademo	Demo Group	Canadian Chevy	DE
	forddemo	Demo Group	Ford	En

A dropdown menu is open from the "No Dealership Selected" button, showing a search bar and a list of dealerships under the "Demo Group":

- ✓ No Dealership
- Search input field
- Demo Group**
- Chevrolet Demo
- Chevy Canada Demo
- Ford Demo
- Honda Demo
- Hyundai Demo

Note, if you are only associated with one dealership, your deals will populate on the screen as soon as you login and this step will not be necessary.



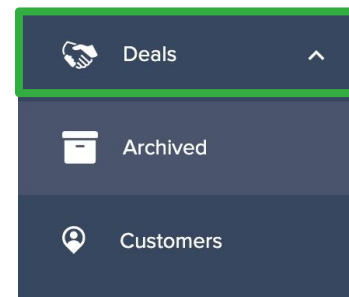
Home Screen Navigation

Deals Main Screen

Actions

1. **Quick Look** will open up an overview of that customer's garage. In the Quick Look, you can see:
 - a. The customer's email, phone number, self-reported credit score, and location
 - b. An overview of their garage including their primary vehicle and their trade in (if applicable)
 - The primary vehicle is the vehicle in the garage that has been given 5 stars by the customer
 - c. A summary of their activity, including Total Engagements (Text and Email)
2. **Go to Garage** will take you directly into the customer's Garage to be able to add new vehicles and/or work the deal
3. **Assign to Me** will quickly assign the Deal to you
4. **Garage Link** will copy the Magic Garage Link to send to a customer. This link will take a customer right into their garage, even on their cell phone

Please note: You will not see a notification that the Garage Link has been copied, but if you paste it, you will see that it did copy over!



Reese Kinsley

Email Reese@dealerinspire.com	Phone (303) 555-0107
Credit Score 790	Location UNKNOWN

Garage 3

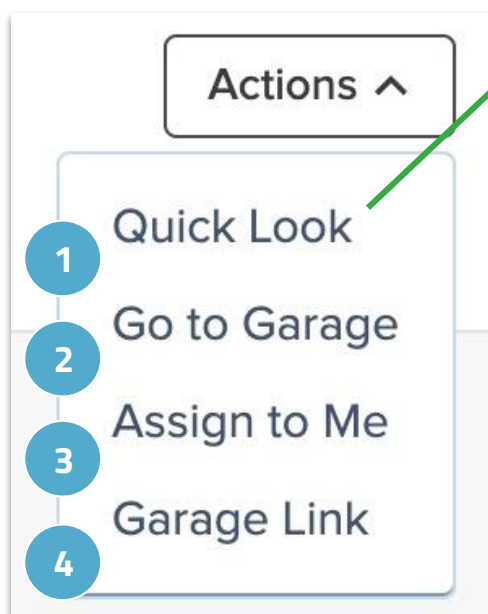
Primary Vehicle New 2022 Hyundai Kona N Line AWD \$29,020 MSRP \$230.30 / monthly lease	Trade 2010 Toyota Prius I Liftback 200,000 mi Good condition Est. Value: \$4,304
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[Open Garage >](#)

Activity

Created November 12	Latest 3 days ago
-------------------------------	-----------------------------

Total Engagements
Text: 0 Emails: 0

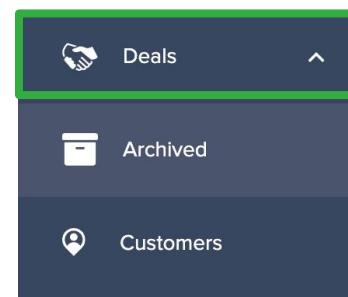


Home Screen Navigation

Deals Main Screen



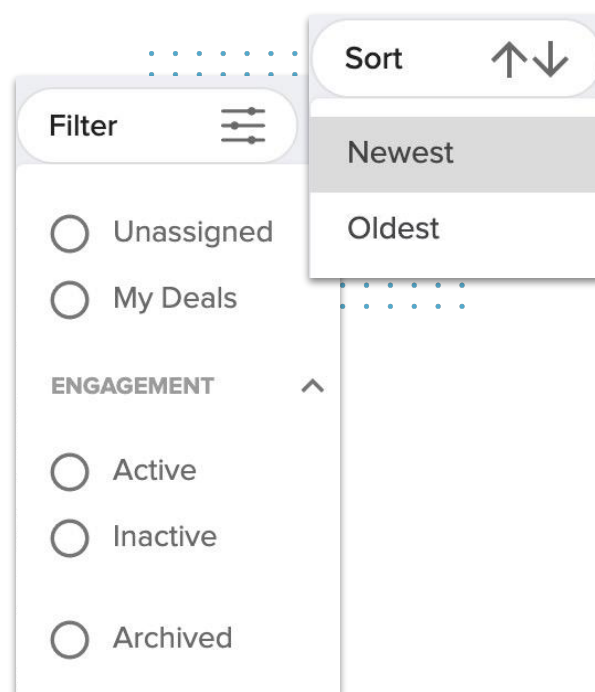
Joe would like to learn a bit more about navigating Deals in Automatic. He wants to be able to sort deals to view only the newest deals first, archive old leads, and assign deals to specific Agents!



Deals

When viewing your Deals, you can...

- Sort from Newest to Oldest or Oldest to Newest
- Filter by:
 - Unassigned
 - Your Deals
 - Engagement
 - Active
 - Inactive
 - Archived
- Search for a specific Deal by First/Last Name, Phone Number, Email, and VIN



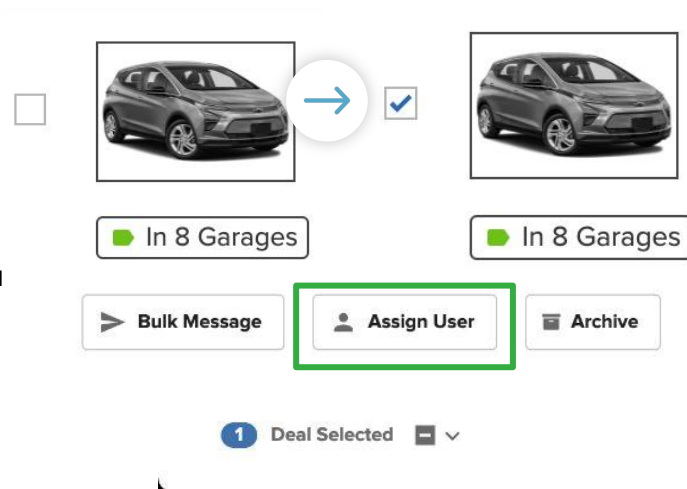
Assigning a Deal

Assigning to Yourself

1. Choose Actions
2. Assign to Me
3. Once selected, your name will populate under the customer name

Assign to Any User

1. Check the box to the left of the deal (note that you can select multiple deals at once)
2. Click assign user in the bottom panel
3. Select the teammate you'd like to pass the deal to
4. Once selected, the name will populate under the customer name

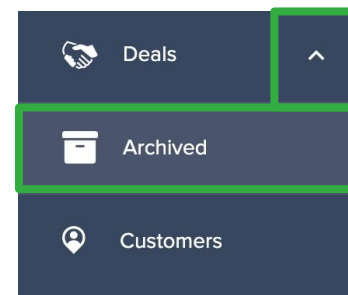


Home Screen Navigation

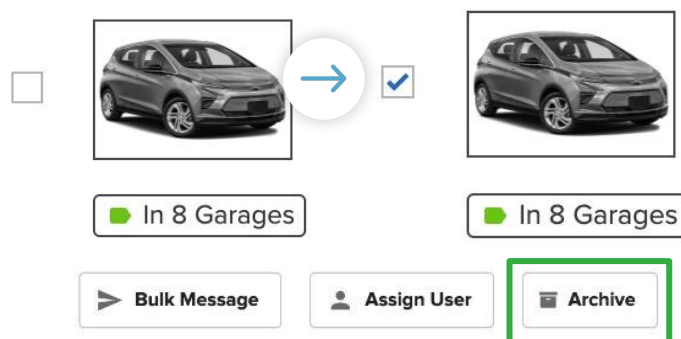
Archived Deals

Archiving a Deal

1. Check the box next to a deal, or multiple deals
2. Click Archive
3. Select Okay



Archived deals will be removed from this list view so that you only see active leads.

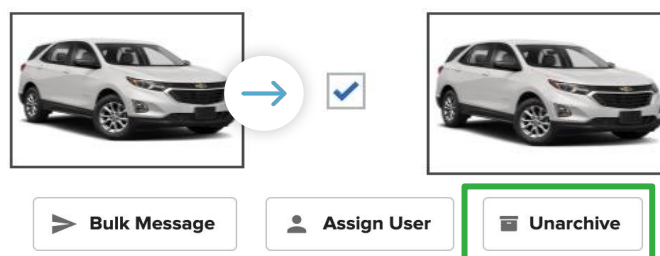


Unarchiving a Deal

1 Deal Selected

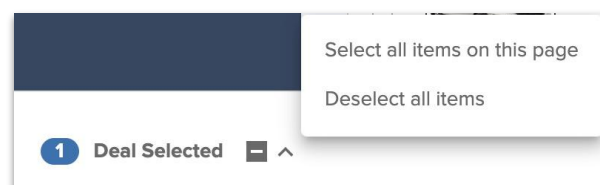
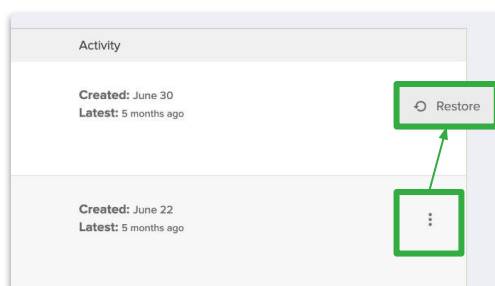
Option A

1. Click the drop down arrow next to Deals
2. Click Archived
3. Check the box next to the lead's name, or select multiple leads
4. Click Unarchive



Option B

1. Click the drop down arrow next to Deals
2. Click Archived
3. Click the three dots (⋮) located to the right and click Restore



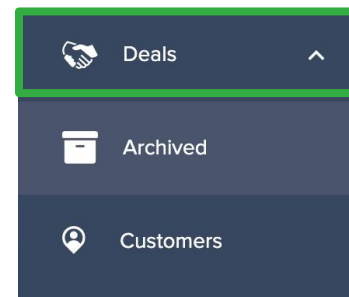
Note: You can easily select all items on this page or deselect all items that are checked.



Home Screen Navigation Customers



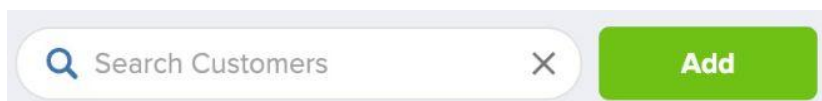
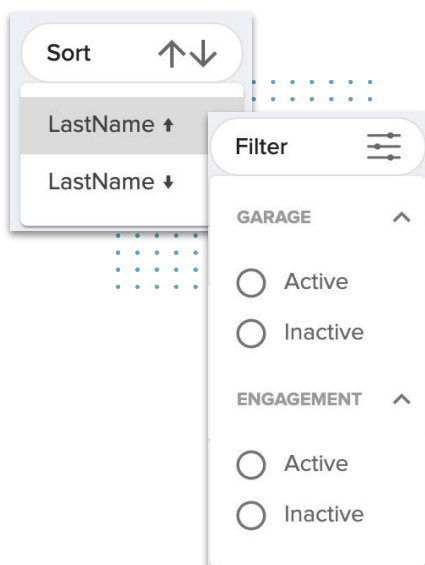
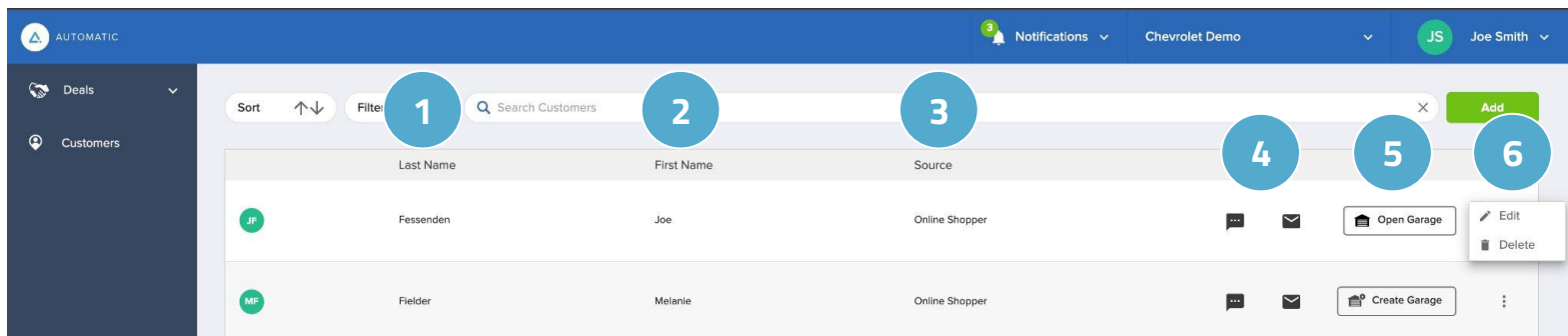
Joe has a handle on Deals, but now would like to find out more information about navigating Customers in Automatic. He wants to be able to find a customer who just created a garage and update their information!



Click into the Customers section to view customers that exist in Automatic.

On this screen you will see the following:

1. Customer Last Name
2. Customer First Name
3. Source: where the lead came from
4. Text Engagement & Email Engagement
5. Open or Create Garage
6. The three dots (⋮) to edit or delete a user



Additionally, you will be able to:

- Sort by Last Name (shown left)
- Filter by Active/Inactive Garages and Active/Inactive Engagement (left)
- Search for a customer via Name, Email, or Phone Number (above)
- Add a customer (above)





Check Your Knowledge

It's time to check your knowledge to see how you're doing!

1. What does the Garage Link via Actions do?
 - a. Generates a link to your website
 - b. Generates a link to Online Shopper
 - c. Generates a link to Automatic
 - d. Generates a link that, when clicked, takes a shopper right back to their garage
2. To archive a deal, click...
 - a. Actions > Archive
 - b. The checkbox next to the photo > Archive
 - c. The dropdown arrow next to Deals > Archived
 - d. Nothing, you cannot archive deals
3. The Activity column shows...
 - a. when a customer logged in
 - b. when a customer signed out
 - c. when a garage was deleted
 - d. when a garage was created and last engaged with
4. The primary vehicle is...
 - a. the most expensive vehicle in a customer's garage
 - b. the vehicle in the garage that has been given 5 stars by the customer
 - c. the first vehicle added into the garage
 - d. their trade in vehicle
5. If the customer does not have a trade in, what will appear in Automatic?
 - a. Please reach out to customer
 - b. No Trade Added
 - c. Missing Trade In
 - d. Vehicle Not Available

Review

What we covered in this section:

Logging in to Automatic
 Home Screen Navigation
 Select a Dealership
 Deals Main Screen
 Archived Dealers

Check your answers at the bottom of the page... how'd you do?

"I got them all right!"

Move on to the next section

"I missed a few."

It might be good to review what you missed

"I missed most, if not all of them."

Review the content linked above



Home Screen Navigation

Customize My View



Joe wants to customize what he sees on both the Deals screen and the Customer section so that he only gets the information that is most relevant to him. 🙄

By customizing his view, he can set up different views for different occasions!

You have the ability to customize what you see, whether you are viewing deals on the Home Screen or viewing Customers.

The Deals Screen will default to show:

- Vehicle Image
- Customer Information
- Trade
- Activity

When viewing Customers, you will see:

- An Avatar, showing their initials
- Last Name
- First Name
- Source

If you do not need to see all of this information, you can customize your view by scrolling down and clicking **Customize My View** in the bottom, left-hand corner of the screen.


 **Customize My View**

Options ✕

- Vehicle ⋮
- Customer Information ⋮
- Trade ⋮
- Activity ⋮

Save Options

View Options

 **Customize My View**


**Deals
Customization**

Options ✕

- Avatar ⋮
- Last Name ⋮
- First Name ⋮
- Source ⋮

Save Options

View Options

 **Customize My View**

**Customer
Customization**



Home Screen Navigation

Customize My View

Options ×

Vehicle ⋮

Trade ⋮

Customer Information ⋮

Activity ⋮

Save Options

View Options

You can rearrange the order in which the items appear on your screen by clicking six dots to the right and dragging the item into a new location.

Uncheck the box for any details that you do not wish to see. This will get removed from the screen.

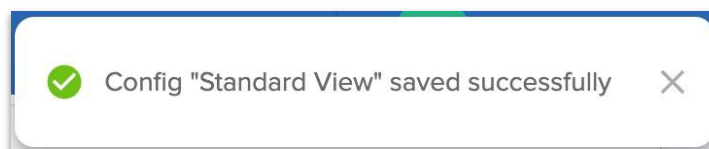
The Home Screen will update in real time and customize which details appear.

If you'd like this to be a permanent view

1. Click "Save Options"
2. Create a name for this view in the Name field
3. Click Save

You will see a notification in the top right corner that your list view has been saved successfully.

Deals Customization



Save Options ×

Name

Also save search

Save

Back

Save Options

View Options ×

No Trade View 🗑️

Standard View 🗑️

Delete All

Back

View Options

If you've created multiple list views you can select the one you want to see by clicking View Options.

As you create your unique list views, your list will appear here. And you can toggle between them in View Options.

Click the trash icon to delete a saved list view.



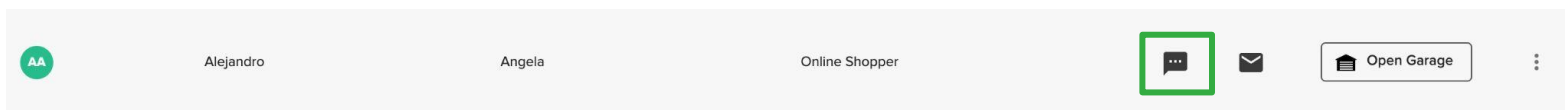
Home Screen Navigation Text Engagement



Joe is looking to reach out to customers who have recently re-engaged with their garages. He knows that his customers are more likely to respond to text message, so he needs to learn more about how to engage customers via SMS through Automatic!

Whether you are on the Home Screen or viewing Customers, Text Engagement allows you to send a text message right to your shopper.

Click the message icon within the row of the customer that you'd like to contact.



This will open up the Text Engagement Portal on the right side of the screen.

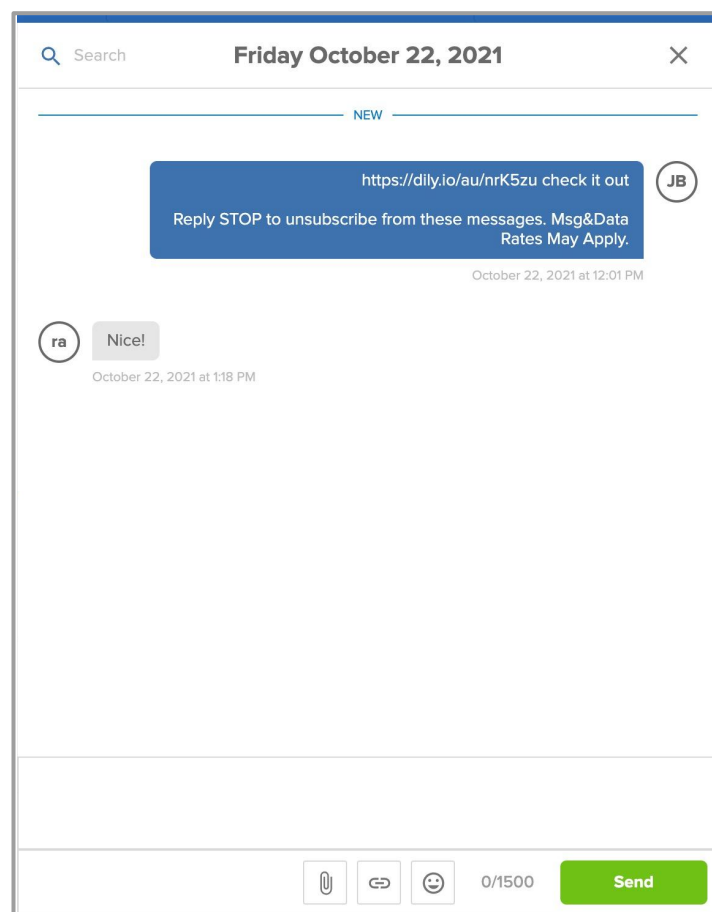
When you first greet your shopper, they will have the option to opt out of the text message conversation by replying STOP.



Best Practice:

Been a few days since recent activity?

Consider adding a new vehicle in that customer's garage. Then send a text with the garage link to get that shopper right back into the car buying process!



Home Screen Navigation Text Engagement

It's not just text that you can send!

The screenshot shows a text messaging interface. At the top, there is a row of various emojis. A green circle labeled 'c' is positioned at the end of this row. Below the emojis is a section for attachments, containing a photo of a store interior, with a green circle labeled 'a' next to it. The main text input area contains the message: "Hi Frank! 😊 Thanks for speaking with me the other day. I found another vehicle that might interest you. I put it into your garage. Take a look: <https://dily.io/au/ksffTr>." A green circle labeled 'b' is next to the link. At the bottom, there are three icons: a paperclip (labeled '1'), a link icon (labeled '2'), and a smiley face (labeled '3'). To the right of these icons is a character count "171/1500" and a green "Send" button.

You can also...

- 1. Attach Files** → Attach a file from your computer, for example a photo or a video.
- 2. Add Garage Link** → The hyperlink icon here will generate the shopper's garage link into the text message field here. You can conveniently get them back into their garage through a text message to re-engage that shopper. This even works if the customer is on their cell phone!
- 3. Toggle Emoji Selector** → Click the smiley face icon to open emojis. Make your messages more engaging!

Note the following:

- Attached files will appear above the text
- The garage link will load as a hyperlink in the message. When customers click the link, it will take them directly into their garage!
- When you click the emoji icon, the available list of emojis will appear above your message.

When you are ready to send your message, click **Send**.




Home Screen Navigation

Bulk Message



Joe wants to reach out to multiple customers who have not been in their garage in a week to get them re-engaged in the car buying process! In order to save time, he can bulk message several users and even send them their own garage link to get them each back into their garage.


Customer Information



Brooks Kinsley

👤 Joe Smith

● In 2 Garages



Jay Boehm

🚫 Unassigned

Bulk Message

Assign User

Archive

Within the Bulk Message:

- You can choose to send to additional users by clicking the drop-down arrow next to the To: field
- Clicking the Garage Link will populate {{ deal.garageLink }} into the body of the text
 - When sent, it will send a link that will take each customer to their own garage
- Emojis are also available in Bulk Messaging
- Note your limit of 1500 characters

To Message Multiple Customers at once:

1. Select multiple deals by checking the boxes to the left of the vehicle picture
2. Click Bulk Message at the bottom of the screen
3. Type your message
4. Send

Compose New Bulk Message

TO Customers: 2 selected

TO Customers: 2 selected

Kinsley, Brooks
Boehm, Jay
Search

- Aguilera, Christina
- Album, Aly
- Allen, Bill
- altier, ryan
- altier, Ryan
- Altier, Josie
- Altier, Ryan
- Anagnostopoulos, Georgia
- Anderson, Janet
- Andrews, Ron
- Anselmo, Benjamin
- Baker, Bianca
- Balise, Todd

Type your message here!

0/1500
Send



Home Screen Navigation

Email



Joe has found that he also needs to be able to email clients, because not everybody has provided a phone number. Luckily, Automatic allows Joe to email customers without leaving the page. He can even easily get customers back into their garage and re-engaged in the car-buying process!

Whether you are viewing Deals or Customers, you can reach out to customers via Email without leaving Automatic. You be able to email customers who have provided an email address.

Click the email icon within the row of the customer that you'd like to contact.



This will open up the Email Engagement Portal on the right hand side of the screen, where you will see a history of your correspondence.

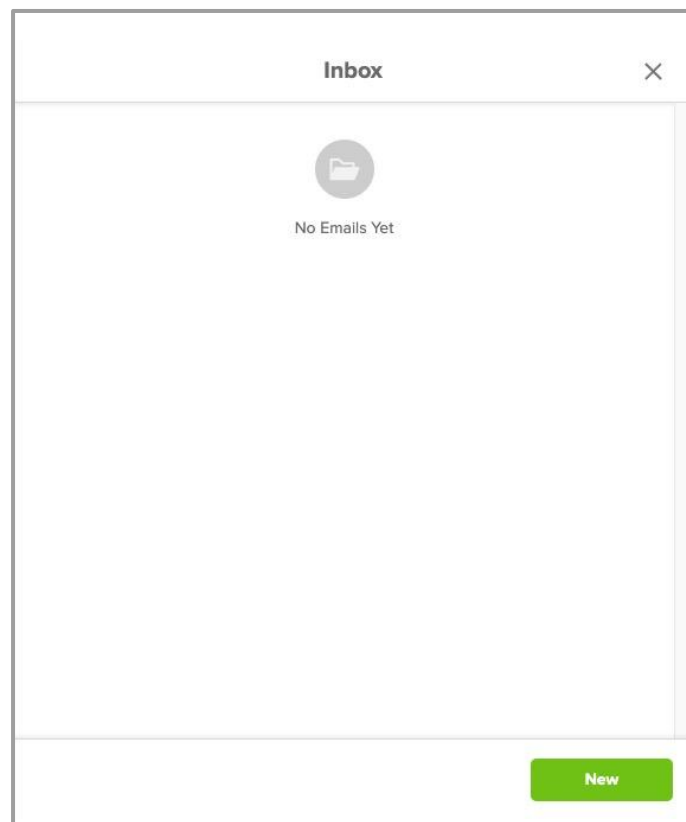
If no emails have been sent, you will see, “No Emails Yet”.

To draft an email, click “New” in the bottom right-hand corner of the screen.



Best Practice:

Be Genuine: Be a human being with emotions, not a cold-hearted copy & paste robot. Address your customer by name. Write a thoughtful response, and show them that you care about their experience as much as they do.



Home Screen Navigation

Email

Once you have selected New, it will prompt you to the Compose New Email window.

You will see:

1. The shopper's email (pre-populated)
2. A subject field
3. A field to type the body of your email
4. A trashcan icon to delete your email
5. Tools in drafting your email:
 - Attach Files
 - Toggle Formatting Toolbar
 - Add Garage Link
 - Toggle Emoji Selector



How-To Summary:

1. Click the Email Icon
2. Select New
3. Add Subject
4. Draft Email
5. Click Send

The screenshot shows the 'Compose New Email' interface. At the top left is a back arrow and 'Inbox'. At the top right is a close 'X' icon. The main title is 'Compose New Email'. Below the title, there are five numbered callouts:

- 1**: Points to the 'TO' field containing 'jksmith@dealerinspire.com'.
- 2**: Points to the 'SUBJECT' field containing 'Type Your Subject Here!'.
- 3**: Points to the email body text area, which contains a placeholder image, the text 'Hello,', a paragraph of text, a link 'https://dily.io/au/7i6gmC', another paragraph, and a sign-off 'Best Regards, Joe'.
- 4**: Points to a trashcan icon at the bottom left of the email body area.
- 5**: Points to the 'Send' button at the bottom right of the email body area.

 The bottom of the screen features a formatting toolbar with options for 'Normal', 'B', 'I', 'U', and alignment options. Below the toolbar is an emoji selector with various emojis. At the very bottom, there is a trashcan icon, a 'Send' button, and a 'Send' button with a paperclip icon.



Home Screen Navigation Email

Within your email draft, note the following:

- Attached files will appear above the text
- The garage link will load as a hyperlink in the message. When customers click the link, it will take them directly into their garage!
- The Formatting Toolbar will pull here
- When you click the emoji icon, the available list of emojis will appear above your message.

*No Email Listed?

- If the To: field is blank, the shopper has not provided an email address to you through their garage
- You cannot add in an email from the Compose New Email screen
- If an email is provided to you at a later time, please edit the customer information from their garage, or through the Customers tab

The screenshot shows an email compose interface. At the top, there is a navigation bar with a back arrow, the text 'Inbox', and a 'Compose New Email' button with a close 'X' icon. Below this, the 'TO' field contains the email address 'jksmith@dealerinspire.com'. The 'SUBJECT' field contains the placeholder text 'Type Your Subject Here!'. A small profile picture of a woman is shown next to the 'TO' field, with a green circle 'a' overlaid on it. The main body of the email contains the text: 'Hello, It was a pleasure speaking with you today! As promised I've included the link to your garage so you can access it at home and make changes as needed: <https://dily.io/au/7i6gmC> I'm looking forward to working with you. Please reach out if you have any questions and I'll check in with you in a few days. Best Regards, Joe'. A green circle 'b' is overlaid on the hyperlink. At the bottom, there is a formatting toolbar with options for 'Normal', bold (B), italic (I), underline (U), bulleted list, numbered list, and indent. A green circle 'c' is overlaid on the list options. Below the toolbar is an emoji picker with various emojis, and a green circle 'd' is overlaid on it. At the very bottom, there is a trash icon, an attachment icon, a text color icon, a link icon, an emoji icon, and a 'Send' button.



Home Screen Navigation

Email

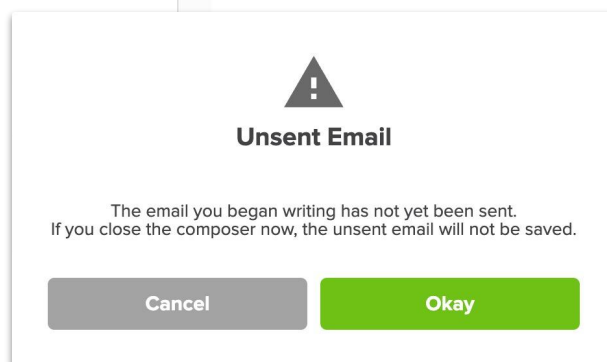
If you have to step away from drafting your email, it's best to leave the screen as is.

Clicking:

1. The X
2. "← Inbox"
3. The trash can icon

... will prompt the "Unsent Email" message, notifying you that your work will not be saved

- Click "← Inbox" to return to view all emails that have been sent back and forth with this shopper
- To read previous emails, click into one of the emails listed in your Inbox



As promised I've included the link to your
take changes as needed:

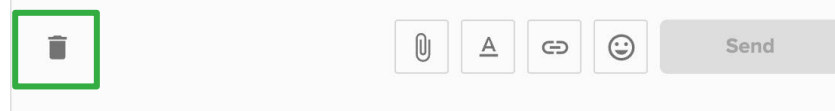
please reach out if you have any questions



Best Practice:

Sign Off With Your Name & Title

A great tip for any relationship, be it business or personal, is to just be yourself! Always sign your reply with your own name and title so shoppers know that there are great people behind your brand that they can work with to buy their next vehicle.





Check Your Knowledge

It's time to check your knowledge to see how you're doing!

- In which screens can you customize your view?
 - The Deals Screen
 - The Customer Screen
 - Both a & b
 - None of the above
- Which is true of Text Engagement?
 - You can only send text
 - The Text Engagement Portal will open in a new window
 - The customer will have the option to opt out by replying STOP
 - Messages delete after 24 hours
- What does `{{ deal.garageLink }}` do in Bulk Message?
 - It will send a link that will take each customer to their own garage
 - It will send everyone a link to your site
 - It resets a customer's garage
 - It unlocks deals in customers' garage
- Which of the following is available in Email, but not in Text?
 - Attach Files
 - Toggle Formatting Toolbar
 - Add Garage Link
 - Toggle Emoji Selector
- What is the word count limit for text messages?
 - 100
 - 280
 - 5000
 - 1500

Review

What we covered in this section:

Home Screen Navigation

Customers

Customize My View

Text Engagement

Bulk Message

Email

Check your answers at the bottom of the page... how'd you do?

"I got them all right!"

Move on to the next section

"I missed a few."

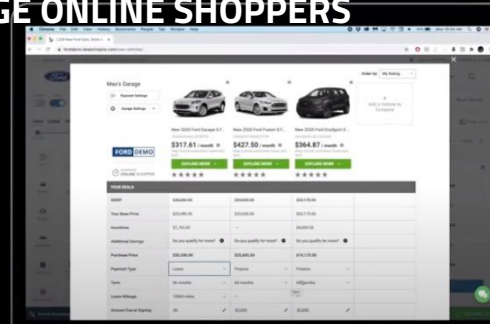
It might be good to review what you missed

"I missed most, if not all of them."

Review the content linked above

HOW TO MAGICALLY RE-ENGAGE ONLINE SHOPPERS

ONLINE SHOPPER
CUSTOMER ENGAGEMENT PARTNER CONTENT



In the Garage: Overview





Joe has access to view and edit a shopper's garage. This will help Joe efficiently update the customer's contact information, or even add inventory to their garage based on what their garage looks like!

The Online Shopper Garage and the Garage in Automatic are two different sides of the same coin. You'll notice that the same vehicles are in both garages. This allows for engagement and instant communication regarding the updates you make on the shoppers behalf.

There are three ways to enter a customer's garage:


1. Click on the vehicle's image
2. Click on the customer's name in Automatic
3. Click Actions > Go to Garage.


	Customer Information	Trade
<input type="checkbox"/>  In 2 Garages	Brooks Kinsley	2010 Toyota Prius I Liftback \$4,304 to \$4,620
<input type="checkbox"/>  In 4 Garages	Jay Boehm Unassigned	2016 Volkswagen Golf 1.8T SEL PZEV Hatchback \$12,754 to \$13,693


Once you've entered the garage, you will have access to a summary of the customer:


- First/Last Name
- Email
- Phone Number
- Address
- Credit score, where applicable
- Assigned Agent (it will stay blank until an Agent is assigned)

You can assign a deal out to a specific teammate by clicking on the "Assigned To" dropdown menu on the left.


BK Brooks Kinsley 


Email
brooks@dealerinspire.com 

Phone Number
(303) 555-0107 

Address
UNKNOWN 

Credit
790

Assigned To
Joe Smith 

Assigned To




In the Garage: Overview

Share via Text

Send for Signature

Print Deal

Share with Garage

Save Edits



New 2022 Hyundai Kona N Line AWD

Stock #: 7H20580
Financing: \$230.30 / monthly



New 2022 Hyundai Kona SEL AWD

Stock #: 7H20553
Financing: \$301.76 / monthly



Financing: \$884.34 / monthly

Add Vehicle

VIN

Cancel Add

+ Add Vehicle

- You can also see the specific vehicles they have saved in their garage
- Click + Add Vehicle to add a vehicle by VIN to the customer's garage

Top Navigation in the Garage

Share Via Text

- Pulls up the Text Engagement window with the Magic Garage Link pre-populated

<https://dilly.io/au/CwL6sL>

25/1500 Send

Send for Signature

- Available if you have an email address on file for the customer
- Sends a digital **intent to purchase** document
- The shopper will receive notification in their garage that you have sent this document for their signature
- They can sign it and return it with a copy of their Drivers License and Insurance Card

Print Deal

- Opens an itemized list of that vehicle's deal in a new tab
- This will breakdown all of the relevant information for that specific deal

Share With Garage/Save Edit

- The shopper will be notified of the changes you've made within their deal

Best Practice:

If you notice a trend of vehicles that the customer is selecting, add another and send a Text with the Magic Garage Link to re-engage the shopper! Call their interest to the newest changes you've made!

Note that an intent to purchase document is not a contract and includes disclaimers explaining that.

Agent View: Adjusting the Deal









As an Agent, Joe can modify anything in the garage that your shopper also has access to edit, like contact information, or even adding vehicles. As mentioned on the page prior, Joe has the ability to even add a vehicle in the customer's garage based on their interests.

Adjusting the deals means you can change details within a vehicle in the garage.

Adjust:

- From Finance, Lease, or Cash
- Term Length
- Down Payment
- Bank Rate Offer
- Selling price
- Upgrades
- Finance and Insurance
- Incentives

 <p>Pre-Owned 2019 Chevrolet Cruze LT FWD Sedan Stock #: PH51681 Financing: \$258.17 / monthly</p>	 <p>Pre-Owned 2019 Chevrolet Cruze LT FWD Sedan VIN: 1G1BE5SM7K7146793 Stock: PH51681</p>	<p>Frank's Trade In View Estimate ></p> <p>Vehicle: 2009 Chevrolet Malibu LTZ Odometer: 24000 mi Condition: Good Value: \$6,250 to \$6,710</p>																								
 <p>New 2022 Chevrolet Bolt EUV LT FWD SUV Stock #: N12978 Financing: \$459.59 / monthly</p>	<p>Automatic Payment Calculations <input checked="" type="checkbox"/></p> <p><small>Turn off Automatic Payment Calculations if you prefer to use Manual Payment Calculations and custom edit the payment information below.</small></p>																									
 <p>Pre-Owned 2020 Chevrolet Malibu LT FWD Sedan Stock #: PH51657 Financing: \$316.91 / monthly</p>	<p>The Deal</p> <p> <input checked="" type="radio"/> Finance <input type="radio"/> Cash </p> <table border="1"> <tr> <td>Term Length</td> <td>60 months</td> <td>Selling Price</td> <td>\$22,000</td> </tr> <tr> <td>Est. Yearly Mileage</td> <td>-</td> <td>Trade-In</td> <td>\$6,250 est.</td> </tr> <tr> <td>Down Payment</td> <td>\$3,350</td> <td>Upgrades</td> <td>-</td> </tr> <tr> <td>Bank Rate Offer</td> <td>3.74% Together C.U.</td> <td>Finance & Insurance</td> <td>-</td> </tr> <tr> <td>Taxes</td> <td>\$1,102.51</td> <td>Incentives</td> <td>-</td> </tr> <tr> <td>Fees</td> <td>\$605.50</td> <td>Payment</td> <td>\$258.17 / monthly</td> </tr> </table>		Term Length	60 months	Selling Price	\$22,000	Est. Yearly Mileage	-	Trade-In	\$6,250 est.	Down Payment	\$3,350	Upgrades	-	Bank Rate Offer	3.74% Together C.U.	Finance & Insurance	-	Taxes	\$1,102.51	Incentives	-	Fees	\$605.50	Payment	\$258.17 / monthly
Term Length	60 months	Selling Price	\$22,000																							
Est. Yearly Mileage	-	Trade-In	\$6,250 est.																							
Down Payment	\$3,350	Upgrades	-																							
Bank Rate Offer	3.74% Together C.U.	Finance & Insurance	-																							
Taxes	\$1,102.51	Incentives	-																							
Fees	\$605.50	Payment	\$258.17 / monthly																							
 <p>New 2022 Chevrolet Silverado 1500 LTD LT 4WD Pickup Stock #: N07104 Financing: \$789.50 / monthly</p>																										
 <p>Pre-Owned 2020 Toyota Corolla LE FWD Sedan Stock #: PH51686 Financing: \$287.54 / monthly</p>																										

When these fields are adjusted, they will affect and update the final payment section, the last field.

Payment

\$381.08 / monthly



Best Practice:

Work the deal and re-engage the customer with any changes that you have made!

This should be a collaborative experience!



Manager View: Customizing the Deal



Since Joe is a Manager in Automatic, Joe will have all the abilities that the Agent view has, plus more! As a Manager, Joe will have the power to toggle off Automatic Payment Calculation to work the deal in Manual Mode.

Only Managers have the ability to toggle back and forth between **Automatic Payment Calculation** and **Manual Mode**.

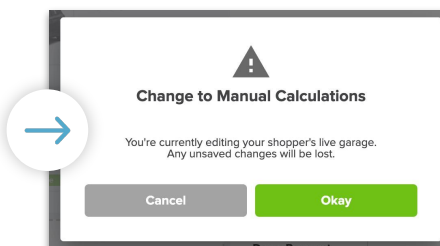
Managers can cross-reference against the desking tool to make each payment penny perfect.

To Customize the Deal as a Manager

1. Switch the toggle next to Automatic Payment Calculations
2. Select Okay

Automatic Payment Calculations

Turn off Automatic Payment Calculations if you prefer to use Manual Payment Calculations and custom edit the payment information below.



3. You will see the following fields show up below:
 - a. Best Offer
 - b. Trade-In
 - c. Upgrades
 - d. Finance & Insurance
 - e. Taxes
 - f. Incentives
 - g. Fees

Best Offer	▼
Trade-In	▼
Upgrades	▼
Finance & Insurance	▼
Taxes	▼
Incentives	▼
Fees	▼



Click the drop-down arrow next to each section to expand and customize as a Manager.

Manager View: Customizing the Deal

Best Offer

- Adjust the lender and the percentage value

Trade In

- Change the trade-in balance, trade-in allowance, and the cash difference

Upgrade

- Add new by clicking + Add Upgrade
- Add an upgrade by typing the name of the applicable accessory, and enter the price accordingly

Finance & Insurance

- Add new by clicking + Add Product
- Adjust or add any finance or insurance options, like extended warranty, gap coverage, or service packages

Tax

- Add new by clicking + Add Tax
- The sales tax will auto-populate based on the zip code the customer uses in their profile
- You have the ability to adjust their zip code accordingly, if needed

Incentives

- Add new by clicking + Add Incentive
- Give your incentive a name and value;
Example: Recent Grad Incentive

Fees

- Add new by clicking + Add Fee
- Fees associated with your dealership should be automatically synced with Online Shopper already
- Make changes to an existing fee

Best Offer

Lender	Value
DI Motor Finance	2.5 %

Trade-In

Year	2010	Make	Toyota
Model	Prius	Trim	I
Odometer	200000 mi	Condition	Good
Estimated Value	\$4,304.00	Trade-in Allowance	\$ 0
Trade-in Balance	\$ 0	Cash Difference	\$ 0

Upgrades

Name	Value
Environmental Protection Package	\$ 545

Finance & Insurance

Name	Value
	\$ 0

Taxes

Name	Value
Sales Tax @ 7.00%	\$ 1303.97

Incentives

Name	Value
	\$ 0

Fees

Name	Value
Acquisition Fee	\$ 695
First Monthly Payment	\$ 230.3



Note that if you are in Lease or Cash, it will change what you may be able to customize.

Manager View: Customizing the Deal

Don't Forget!

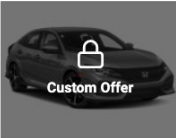
 Share with Garage

 Save Edits

- When making manual edits, be sure to save your changes by clicking Save Edits/Share with Garage
- This will push the custom offer directly to your shopper
- Also note: Sending a custom offer locks the shopper out of editing that vehicle within their garage. They will see a CTA that says “View My Custom Offer”

Jill's Garage

[Payment Settings](#)
[Garage Settings](#)

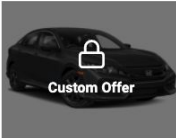


Custom Offer

New 2021 Honda Civic Hatchback
SHHF7H46MU218504

\$147.31 / month
This custom offer is being provided by the dealership. Please see dealership for details.

[VIEW CUSTOM OFFER](#)




Custom Offer

New 2021 Honda Civic Hatchback
SHHF7H64MU207762

\$377.21 / month
This custom offer is being provided by the dealership. Please see dealership for details.

[VIEW CUSTOM OFFER](#)



Custom Offer

New 2021 Honda Civic Hatchback
SHHF7H42MU212540

\$314.56 / month ⓘ
May include estimated taxes and fees

[EXPLORE MORE](#)

HONDA
powered by ONLINE SHOPPER

★★★★★

YOUR DEALS			
Your Base Price	\$25,095.00	\$25,455.00	\$25,490.00
Payment Type	Lease	Finance	Finance
Term	24 months	72 months	72 months
Lease Mileage	15000 miles	—	—
Amount Due at Signing	\$4,000	\$2,510	\$2,510
Trade In Value	\$3,738	\$0	\$3,738
Best Bank Offer	American Honda Finance Corp.	3.50% Cap One	2.90%
Upgrades	\$908.00	\$0.00	\$0.00

If you toggle back to the Automatic Payment Calculations:

- It will revert back to the original, default numbers
- The customer will then be able to adjust the fields on their end



How-To Summary:

1. Switch off Automatic Payment Calculations
2. Make adjustments to the deal
3. Click Save Edits
4. Reach out to shopper!



Best Practice:

The next month's incentives will populate automatically on unlocked garages - not on custom offers.

We recommend working with your team to set a time, like the end of the month, to go through and unlock those custom offers.





Check Your Knowledge

It's time to check your knowledge to see how you're doing!

- To add a vehicle into a customer's garage, you need to add:
 - a link to the VDP
 - the garage PIN
 - a VIN
 - an image of the vehicle from your site
- Which of the following is not a way to access a customer's garage in Automatic?
 - Click Customers > Access Garage
 - Click the vehicle's image
 - Click the customer's name on the deals screen
 - click Actions > Go to Garage
- Who can toggle off Automatic Payment Calculations?
 - Agents
 - Managers
 - The Customer
 - Anyone with access to a garage
- The Tax within a deal...
 - cannot be altered
 - auto-populates based on the zip code provided
 - does not affect the payment calculation
 - must be manually entered
- By clicking Save Edits or Share with Garage...
 - A customer will be locked out of adjusting fields in their garage
 - The deal will be reset
 - The customer will get a text
 - The customer will need to log out and back in to see changes

Review

What we covered in this section:

In the Garage

Agent View: Adjusting the Deal

Manager View: Customizing the Deal

Check your answers at the bottom of the page... how'd you do?

"I got them all right!"

Move on to the next section

"I missed a few."

It might be good to review what you missed

"I missed most, if not all of them."

Review the content linked above



HOW TO RENEW LEASES WITH MAGIC GARAGE LINKS

Year/Make	MSRP	MSRP	MSRP
2021 Ford EcoSport	\$16,999	\$16,999	\$16,999
2021 Ford Bronco SE	\$364.96	\$364.96	\$364.96
2021 Ford Escape SE	\$458.04	\$458.04	\$458.04

Creating a Customer & Garage



Joe just got a call from a customer interested in buying a vehicle. Joe can capture the lead in Automatic by creating a customer and even create a garage for that customer. This way, he can share the garage information with the customer and work collaboratively with them in selecting the vehicle that is right for them!

To Create a Customer and Garage

1. Click Customers
2. Select Add
3. Fill out the Customer Information

The following fields are **required**:

- a. First Name
- b. Last Name
- c. Email
- d. Phone
- e. Zip Code

You may also choose to fill out:

- f. Preferred Name
- g. Country
- h. Street
- i. City
- j. State

Add Customer

First <input style="width: 95%;" type="text"/>	Email <input style="width: 95%;" type="text"/>
Last <input style="width: 95%;" type="text"/>	Phone <input style="width: 95%;" type="text"/>
Preferred Name <input style="width: 95%;" type="text"/>	
Country USA ▼	
Street <input style="width: 95%;" type="text"/>	
City <input style="width: 25%;" type="text"/>	State <input style="width: 25%;" type="text"/>
	Zip Code <input style="width: 25%;" type="text"/>

Cancel
Save ▼

The zip code is required and very important for estimating taxes and fees

Once all of the required information has been filled out, the Save button will appear green.

4. Click the drop-down arrow to the right of Save
5. Select Save & Create Garage
6. Enter a VIN for the new garage

Create Garage

Enter VIN

Cancel
Create

Cancel
Save ▲

Save & Create Garage

Note: You can just press Save for now, and at a later time go to Customers > Create Garage





Profile



Joe wants to review that the information in his profile is accurate. He will need to navigate to his Profile and save any changes he made along the way.

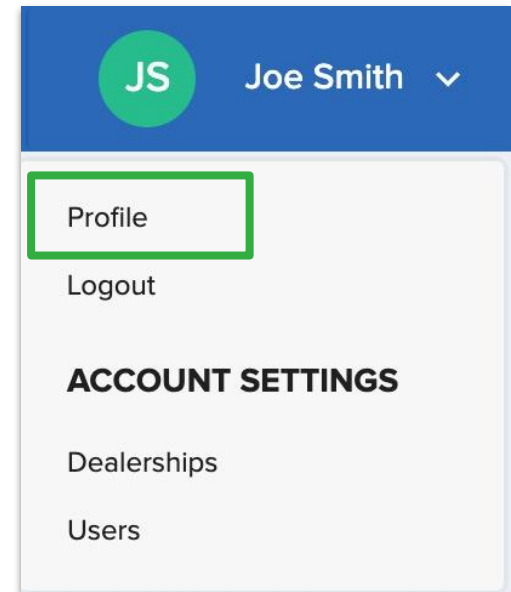
To update your Profile,

1. Click your name in the top right-hand corner of the screen
2. Choose Profile
3. Update:
 - a. First Name
 - b. Last Name
 - c. Email
 - d. Voice Number → this number is used for voice communications
 - e. Text Number → the auto-generated number used for text communications and cannot be edited
 - f. Personal Number → this is where we will send alerts
4. Dealership and Role settings
5. Save your changes

When dialed, this number will forward to the voice number. The call will forward to the dealership's main number when no user voice number exists.

Note you can click **+ Add Dealership** to see the deals for another dealership in your group.

Choosing the **⊗** will remove that dealership from your profile so that you will no longer be able to see deals for that site.



You can also choose to Logout by clicking your initials.

My Profile

First
Joe


Last
Smith

Email
estillman@dealerinspire.com

Voice Number
() - - - -

Text Number

Personal Mobile
() - - - -



Dealership	Role	
Chevrolet Demo	Dealer Admin	<input checked="" type="checkbox"/>
Ford Demo	Dealer Admin	<input type="checkbox"/>
Honda Demo	Dealer Admin	<input type="checkbox"/>
Training Sandbox	Group Admin	<input type="checkbox"/>
Hyundai Demo	Dealer Admin	<input type="checkbox"/>
+ Add Dealership		

Cancel Save



Account Settings: Garage PIN & Alerts



Joe wants to create a personalized message when a customer receives a PIN to their garage. He also would like to be alerted to his personal number when a customer replies.

Through Automatic, you have the ability to configure alerts when a message is received, customize the response sent with a customer's garage PIN, and enable shoppers to text back to the automated message.

Garage PIN

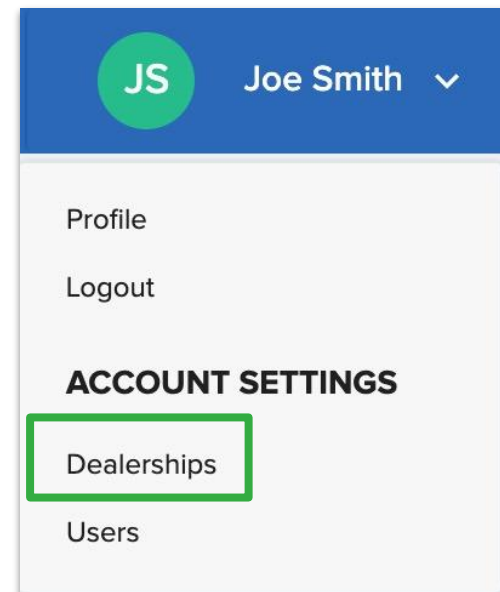
To adjust these settings:

1. Click your name in the top right corner of the screen
2. Click "Dealerships"

You should see your dealership listed, and if you are associated with multiple dealerships, you will need to select the dealership you would like to adjust the settings for.

From here:

3. Choose the three dots (⋮) on the right hand side
4. Select "View"



Dealer Name	Slug	Group	Brand	Email Status	
Chevrolet Demo	chevydemo	Demo Group	Chevrolet	Enabled	⋮
Chevy Canada Demo	chevycanadademo	Demo Group	Canadian Chevy	Disabled	⋮
Ford Demo	forddemo	Demo Group	Ford	Enabled	⋮

The screen shown above will list the Dealer Name, Slug, Group, Brand, and whether Email through Automatic has been enabled. Email through Automatic must be turned on and can be enabled by clicking the three dots (⋮) as well.



Account Settings: Garage PIN & Alerts

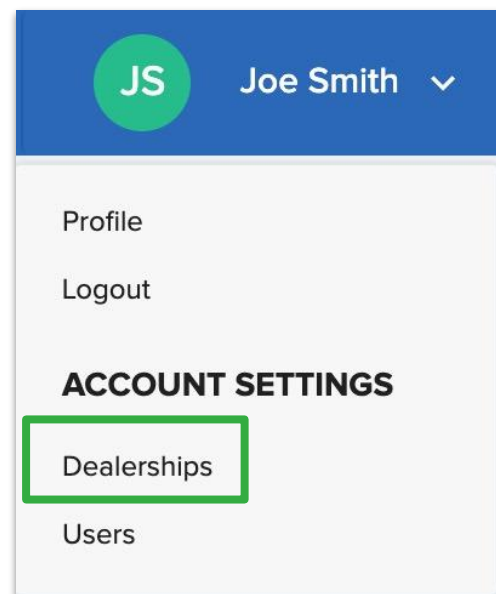
You will be brought to a new screen.

From here:

5. Click to expand Engagement Configuration

The first setting you can adjust refers to the Garage PIN that is sent to the shopper. Previously, the PIN was sent by a number that, if responded to, the dealer could not receive.

Now we have the option to allow shoppers to reply to that text message and for dealers to receive their response. If you would not like to receive responses from the Shoppers once their PIN is sent, please leave the toggle in the off position.



Dealership Information >

Engagement Configuration >

Text Notifications >



Engagement Configuration

Garage PIN

Configuration of your Garage PIN for Online Shopper.

Allow replies from PIN Validation message.

Text

Preview: Hello! Your Garage PIN is [number]. We're here to help you through this journey. You can reply to this message if you need anything. Thank you!

Create Message

Click in the box that says "Create Message" and begin drafting your response!

You will see a preview of the message above, updated in real time.

Customize the Message That Is Sent with the PIN



Account Settings: Garage PIN & Alerts

Alerts

Below the Garage PIN, you will see a section for Alerts.

By enabling Alerts, you will be notified via SMS when a text message is received.

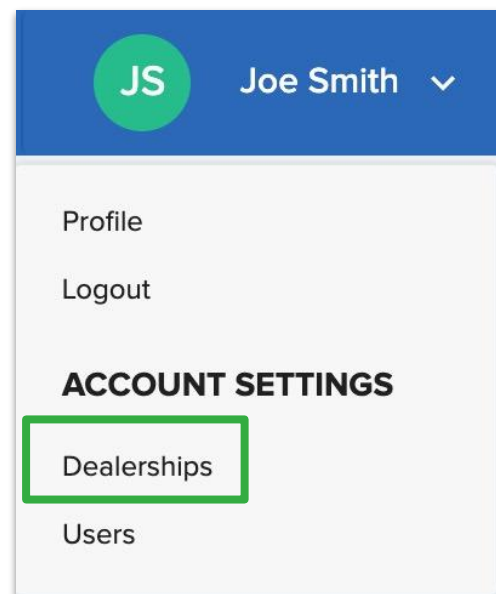
The alert message will contain:

- the customer name
- the message

Note: To turn on this feature, first ensure the dealer user has added a personal mobile number for their alerts to be sent to. See our section on [Profile Set Up](#) for more information on how to do this.

To turn on this feature:

1. Click to expand the Text Notifications section
2. Click the toggle to the on position to enable alerts



Dealership Information >

Engagement Configuration >

Text Notifications >

Text Notifications

Do you want notifications when a customer replies?

Users assigned to customers will always receive notifications.

Enable Notifications



Text Notifications

Do you want notifications when a customer replies?

Users assigned to customers will always receive notifications.

Enable Notifications



Customer Reply Alerts

- Alert All
 Alert Specific Users

Users: None ▾

Search Users

- Choose Alert All if you want all of the dealer users alerted.
- Choose Alert Specific Users if you want only specific dealer users alerted when a customer replies.



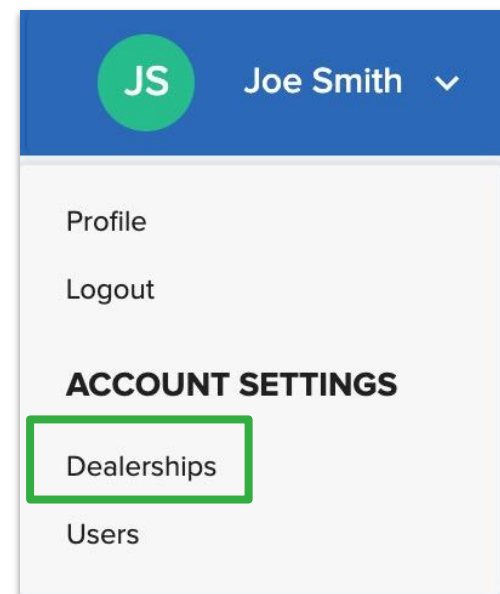
Account Settings: Garage PIN & Alerts

From here you can choose which type of deals will generate alerts: assigned or unassigned.

- Assigned alerts will only notify the dealer teammate assigned to this deal when a text has been received
- Unassigned alerts will notify users when a customer with an unassigned deal replies

You have the option to choose both if you want alerts going to dealers for both unassigned and assigned deals.

Make sure to Save changes to activate these new settings in the bottom right hand corner.



Text Notifications

Do you want notifications when a customer replies?

Users assigned to customers will always receive notifications.

Enable Notifications

Customer Reply Alerts

- Alert All
 Alert Specific Users

Users: None

Cancel

Save



How-To Summary for Garage PIN:

1. Click your name
2. Select Dealerships
3. Click the three dots (:) > View
4. Click Engagement Configuration
5. Switch the Toggle



How-To Summary for Alerts:

1. Click your name
2. Select Dealerships
3. Click the three dots (:) > View
4. Click Text Notifications
5. Switch the Toggle
6. Customize Alerts



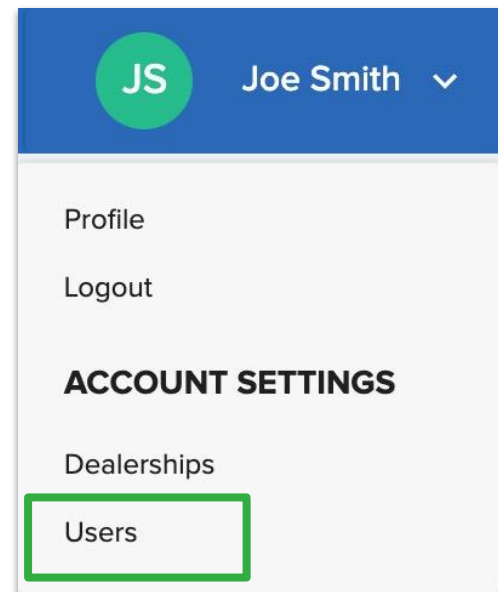
Account Settings: Adding Users



Joe recently hired some new employees to his dealership. He will need to create new users to be able to work the leads that are coming in to Automatic.

To add a new user:

1. Click on your name in the top right corner of the screen
2. Click "Users"
3. Click Add User
4. Fill out the appropriate information (First/Last Name, Email, Voice Number if desired, Personal Mobile if desired, Dealership, and Role)
5. Click Save



Add User

First

Last

Email

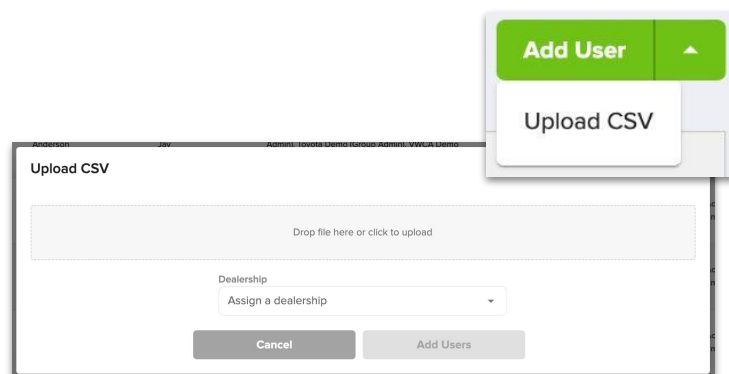
Voice Number

Text Number

Personal Mobile

Dealership Role

[+ Add Dealership](#)



Note that you can choose the drop-down arrow to Upload a CSV



Account Settings: Adding Users

User Roles

- User roles are selected when a user is created
- Regardless of role type, users will be able to see deals in the backend of Online Shopper
- The user role determines which deals they can view, and what additional capabilities they have in the backend of Online Shopper
- Users can only create new roles that are at an equal or lesser level. Example: *A Manager can make another Manager an Agent user, but a Manager cannot create a Dealer Admin user.*

JS Joe Smith ▾

- Profile
- Logout
- ACCOUNT SETTINGS**
- Dealerships
- Users**

Roles	Capabilities
Group Admin	<ul style="list-style-type: none"> • Has visibility to all dealerships deals within their dealer group • Can update that group's dealership addresses and phone numbers • Can create new users of any level for any dealership location that they have access to • Can create a dealer admin user for each dealership to manage each location
Dealer Admin	<ul style="list-style-type: none"> • Can manage an individual dealership's users by creating new users, editing users, and disabling or deleting them • Can only edit that dealership's address and phone number
Manager	<ul style="list-style-type: none"> • Can access all deals • Can create other manager and agent users, and manage those users • Can work in the Automatic and Manual screens and customize when in Manual • Will have access adjust blank fields in the following areas while in a Garage: Upgrades, Finance & Insurance, Taxes, Incentives, Fees
Agent	<ul style="list-style-type: none"> • Can access their deals • Can make edits when the Automatic toggle is on • Pass deals to Managers



Notifications



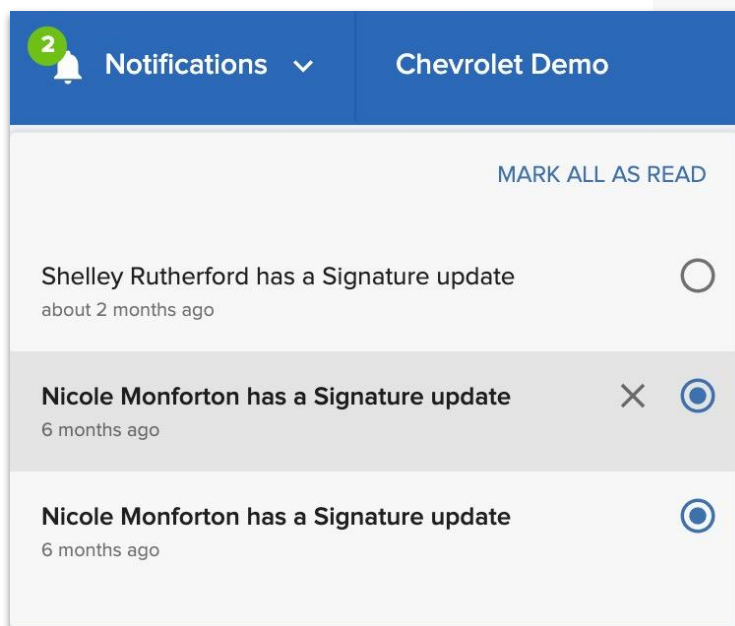
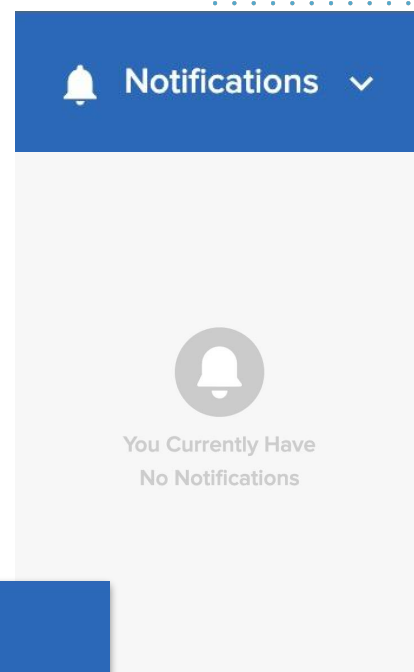
Joe noticed that he has a green notification next to the bell icon in the top navigation bar.

What you'll be notified on:

When a customer has returned a Signature, you will receive a notification in the top navigation bar.

You can:

- Mark all as read
- Individually select each circle to mark as read/unread
- Press X to remove the notification





Check Your Knowledge

It's time to check your knowledge to see how you're doing!

1. To allow customers to respond to the Garage PIN message, click...
 - a. Dealerships > Email > Settings
 - b. Your name > Dealerships > Dealership Information
 - c. Dealerships > Customers
 - d. Your name > Dealerships > Engagement Configuration
2. Under Text Notifications in the Account Settings, you can...
 - a. delete notifications
 - b. change the text emojis
 - c. enable notifications when a customer replies
 - d. disable all text messaging
3. Which type of user role can create a user that is a Dealer Admin?
 - a. Group Admin
 - b. Dealer Admin
 - c. Manager
 - d. a & b
 - e. b & c
4. Which of the following cannot be edited?
 - a. Text Number
 - b. Personal Number
 - c. Email
 - d. Voice Number
5. Which is not a required field when adding a customer in Automatic?
 - a. Zip Code
 - b. Email
 - c. State
 - d. First/Last Name

Review

What we covered in this section:

Creating a Customer and Garage Profile

Account Settings

Garage PIN & Alerts

Adding Users

Notifications

Check your answers at the bottom of the page... how'd you do?

"I got them all right!"

- Move on to the next section

"I missed a few."

- It might be good to review what you missed

"I missed most, if not all of them."

- Review the content linked above





Congratulations!



Joe has all he needs to understand the customer journey through Online Shopper!

He can also work the deal by logging into Automatic. He knows how to customize deals, create customers and garages, re-engage shoppers in the car buying process, and collaborate with customers!

Learn More!

Learn about Conversations

Do you have Conversations, our advanced messaging platform?

Check out our Training Guide for the following:

- Agent: For those answering chats
- Admin: For anyone leading the Conversations charge
- Mobile: Learn to answer chats on the go

Learn about Prizm

If you are an Admin, you can answer chats just like an Agent, but have access to additional features in the backend.

As an Admin, you will have the ability to add users, access reporting, take over chats, and even customize the look and feel for the customer chatting on your site!

I need to reach a Trainer!

Have a question or looking for additional resources or training?

Reach out to a Trainer!

Email us at trainers@dealerinspire.com and someone will reach out!

