CRM Link: eLead CRM (and Ford Direct)

Overview

CRM Data is a critical source of Data which the AutoLeadStar CDXP utilizes across various marketing and sales solutions (including CRM Link, Acquire, Nurture) in order to connect and enhance interactions and customer engagements as well as populate the AutoLeadStar Data Lake.

Connecting your CRM to the CDXP

Keep in mind a few very critical points:

1. IF your Dealership *shares one CRM between more than one Dealer rooftop*, custom and extended setup for CRM Link may be required.

2. IF we encounter *issues or bugs with your CRM* (we get it, software isn't always perfect) we are beholden to the ques and SLAs of your CRM provider and therefore extended setup of your CRM Link may be required.

3. Please *make sure the CRM credentials you share with your Customer Success Manager actually work*, as in, you have tried and successfully logged into your CRM with the credentials.

4. Secondly, please *make sure those credentials have access to the relevant reports listed below*. Providing updated credentials with the required permissions for the reports below will enable us to set up your CRM Link more quickly and efficiently.

Permissions and Reports

Each CRM is built differently and has a different set up for the reports it can create. Our system identifies the best reports and pulls metrics from those reports accordingly. The list below describes which reports we use inside of the ***eLead CRM (also Ford Direct)***:

APPOINTMENTS

The login you provide to AutoLeadStar should have full access to the Sales Appointment Log.

LEADS

The login you provide to AutoLeadStar should have full access to the Advanced Search in order to pull Lead information.

SALES

The login you provide to AutoLeadStar should have full access to the Dealership Sold Details in order to pull customer information on those entities marked as SOLD.

OTHER

The login you provide to AutoLeadStar must be able to export reports so that we can pull this data into our platform on a regular basis.

It is also critical to ensure that your eLeadCRM is set up to reactive leads after a certain period of time. This allows us to pull audiences and engage colder, older leads inside your CRM. ***Read here to learn how this particular configuration should be set up.***

Time to Completion

If your Customer Success Manager is provided with up to date logins, which have the necessary access and permissions to all the reports and abilities listed above, then we endeavor to complete all CRM Link setup within 3 business days.

*Exceptions to this are listed above, **see critical points**.*