

# Sales & Customer Management Pro



A CRM built to operate at full efficiency for a seamless customer experience



**Are you a General Manager** seeking to manage leads in a single, unified workflow? Take your leads from start to finish with a streamlined, easy-to-use system at a price that makes sense for you.



## Superior Customer Experience

Integrated CRM for a customer-centric workflow with organized records all in one place

- Manage leads and configure automation to track and assign tasks before and after the sale, from click-to-curb
- Communicate efficiently using dealer-specified criteria with templates via call, text or email
- View consolidated customer history and create customizable reports to manage all lead and customer activity.



## One Unified Platform

Manage customer activity across your entire dealership from within your DMS—no more duplicate entries.

- Provide efficient quotes with knowledge of open ROs, cost-of-sale adjustments and recap functionality
- Embedded F&I Menu and digital contracting with provider integration
- Complete deals and share vehicle history reports on any device, from anywhere on the lot
- Keep your F&I department secure with features that document OFAC compliance, red flag, privacy notice, risk-based pricing and adverse actions





# Level-Up Your Sales & Customer Management



## Features Overview

### Tier: SCM Lite



#### Easy Customer Management

Add, search and manage customer relationships from any device, any time



#### Simplified Desk Deals

Access real-time inventory, repair orders and easily configure taxes and fees from multiple devices



#### Diverse Deskings

Create deals with multiple interest rates or terms, different insurance combinations, fees or down payments



#### Personalized Payment and Vehicle Scenarios

Create payment options that fit each customer's budget in a side-by-side view



#### Loan Choices

Installation, Balloon, Single Payment, Ford Flex Buy and more



#### Integrated Taxes

Access detailed tax updates on each deal in every state



#### Robust Integrations

Support credit checks such as RouteOne, 700 Credit and CUDL from one platform



#### Real-Time eRating

View products and services for the vehicle being sold with direct-from-provider rates



#### Provider-Specific eContracting

View and input data into a live eContract from the provider to print, sign and submit



#### Compliance Price Caps

System logic prohibits dealer from selling products higher than the regulated maximum price

### Tier: SCM Pro

Everything in Lite, plus:



#### Direct Communication

Email, text or call customers with ease and track all interactions from the Customer Record



#### Consume Third-Party Leads

Receive leads from your third party lead providers, automatically parsed and added to the database



#### Streamlined Workflow, Responsive Design

Work leads from the desk, through appointments and on the lot, taking advantage of one simple platform view from any device



#### Custom Lead Assignment Rules

Ability to track internet leads, floor traffic and phone-ups



#### Contact Templates

Create uniform messaging and eliminate redundancy by creating email and text templates with auto-fill merge fields



#### Lead Analytics and Communication Reporting

Independently owned, with decades of industry experience, Autosoft understands the challenges you face. Rely on our expert, in-house support team who will get you up and running quickly and set for success. We'll help you rise above the competition with accurate customer data that will enable you to better identify sales opportunities and tailor customer experiences. Visit [autosoftdms.com](https://autosoftdms.com)