



KELLEY

CREATING A NEW CUSTOMER AND DEAL (DESKTOP)



BoF

JLR

KAM

KC

StK

TKB

TKC

TKV

85

18

17

35

1

2

3

4

Sales Pipeline

+ Add Filter

29

378

Engaged

287

3

7

967

Visit

919

9

709

Proposal

665

2

8

64

Sold

44

17

Snooze

0

Snaps

9

Videos

14

Hit List

3. Enter Customer information (Name, phone number, email address) into search bar



Thomas Dent



2. Make sure no filters are selected



1. Make sure all the dealerships are highlighted

Thomas Dent

Tom Kelley Buick GMC

Thomas Dent

Tom Kelley Volvo Cars

Thomas Dent

Kelley Chevrolet

Thomas Dent

Jaguar Land Rover of Fort ...

Thomas Dent

Tom Kelley Cadillac

~~Thomas Dent~~

~~Kelley Chevrolet~~

Tommy Dent

BMW of Fort Wayne

4. Review results that match the search criteria you are looking for

NOTE: Unlike Elead, customers will have a profile at each dealership they have submitted a lead to or purchased a vehicle from.

You need to make sure to create a New Deal in the correct dealership. If a profile does not currently exist, you will need to create a new customer.

BoF

JLR

KAM

KC

StK

TKB

TKC

TKV

46

4

17

33

1

2

>>

Sales Pipeline

+ Add Filter



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TKV

Sales Pipeline

+ Add Filter

28

6. Enter Customer Contact Information

Store

First Name

Last Name

Company

Phone

Email

Kelley Chevrolet

Thomas

Dent

Company

(260) 417-0034

Email

Add New Customer

Open Deals

Customers

TD

Thomas Dent · Kelley Chevrolet

thomaswdent@gmail.com · (260) 417-0034 · 1811 VANDERBILT DRIVE · Fort Wayne, IN 46845

AF

NOTE: If the system identifies a possible existing profile, it will appear below. Select this profile if the data matches.

95

Delivered

201

17 Snooze

0 Snaps

8 Videos

14 Hit List

BoF

JLR

KAM

KC

SK

TKB

TKC

TKV

Sales Pipeline

+ Add Filter

Open Deals

Customers

Thomas Dent

Add New Customer

TypeIndividualFirst NameThomasLast NameDent

EmailCell Phone(260) 417-0034Home Phone

AddressCityStateZIP

StoreKelley ChevroletSourceDescriptionSalespeopleBDC

Interested VehicleTrade-In

CANCELADD CUSTOMER

8. Complete the customer data fields

9. Insert interested vehicle

mail

Email

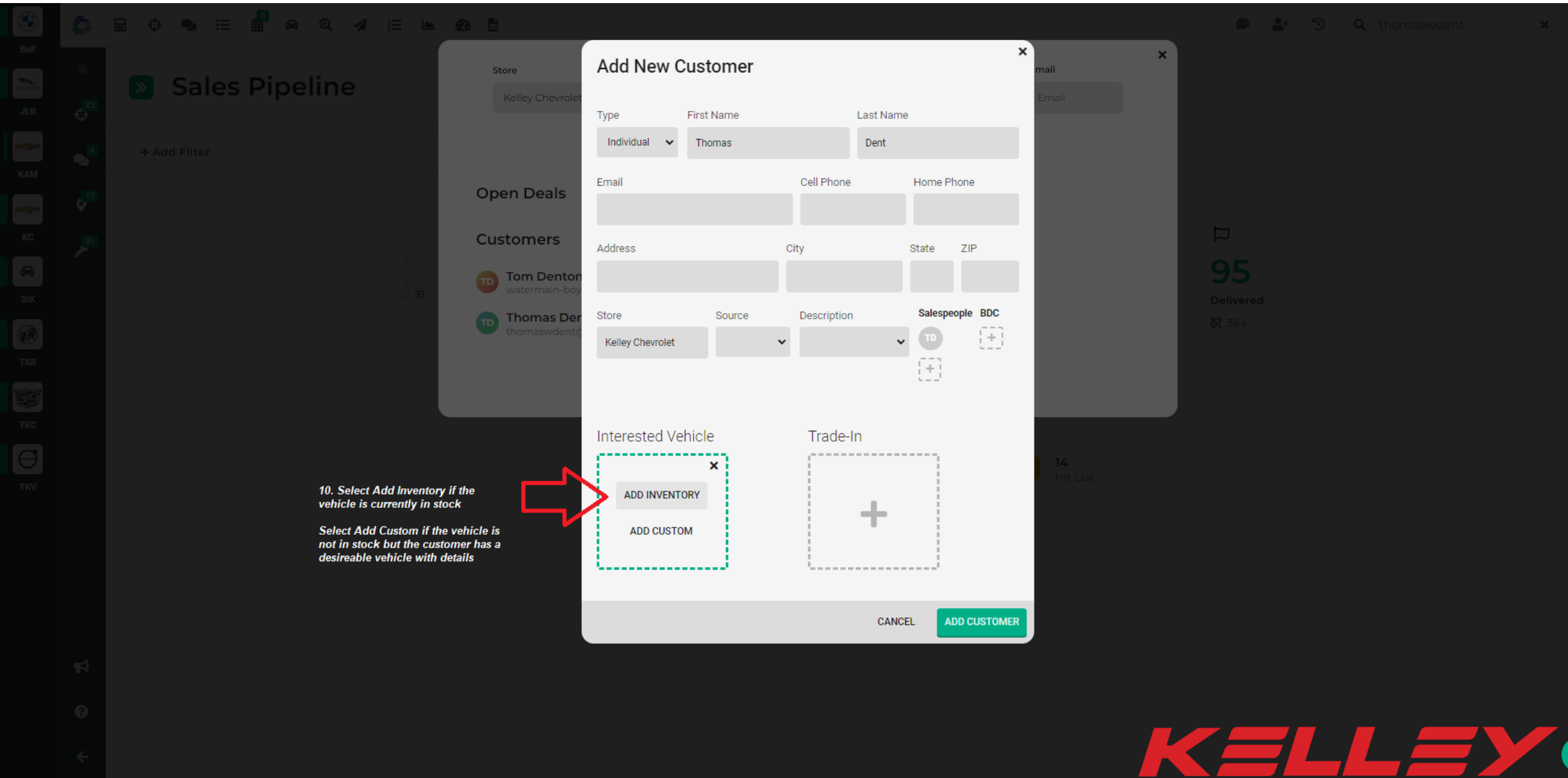
95

Delivered

201

14

Hit List



×

Add New Customer

Type

Individual ▾

First Name

Thomas

Last Name

Dent

Email

Cell Phone

Home Phone

Address

City

State

ZIP

Store

Kelley Chevrolet

Source

▾

Description

▾

Salespeople

TD

BDC

+

Interested Vehicle

×

ADD INVENTORY

ADD CUSTOM

Trade-In

+

CANCEL

ADD CUSTOMER

10. Select Add Inventory if the vehicle is currently in stock

Select Add Custom if the vehicle is not in stock but the customer has a desirable vehicle with details

Inventory

Store Status Price Make Model Year Color Mileage Trim Engine
Body Style Drivetrain

Clear All

Search inventory

11. Search KAG inventory by stock number, year, make, or model

Recently Added

1113 Vehicles

NEW 2A4017

2024 GMC Sierra 2500HD

4WD Crew Cab 159" Denali Ultimate

Tom Kelley Buick GMC



12. Select Add to Deal



Add to Deal

View Details

NEW 2A4018

2024 GMC Sierra 2500HD

4WD Crew Cab 159" Denali

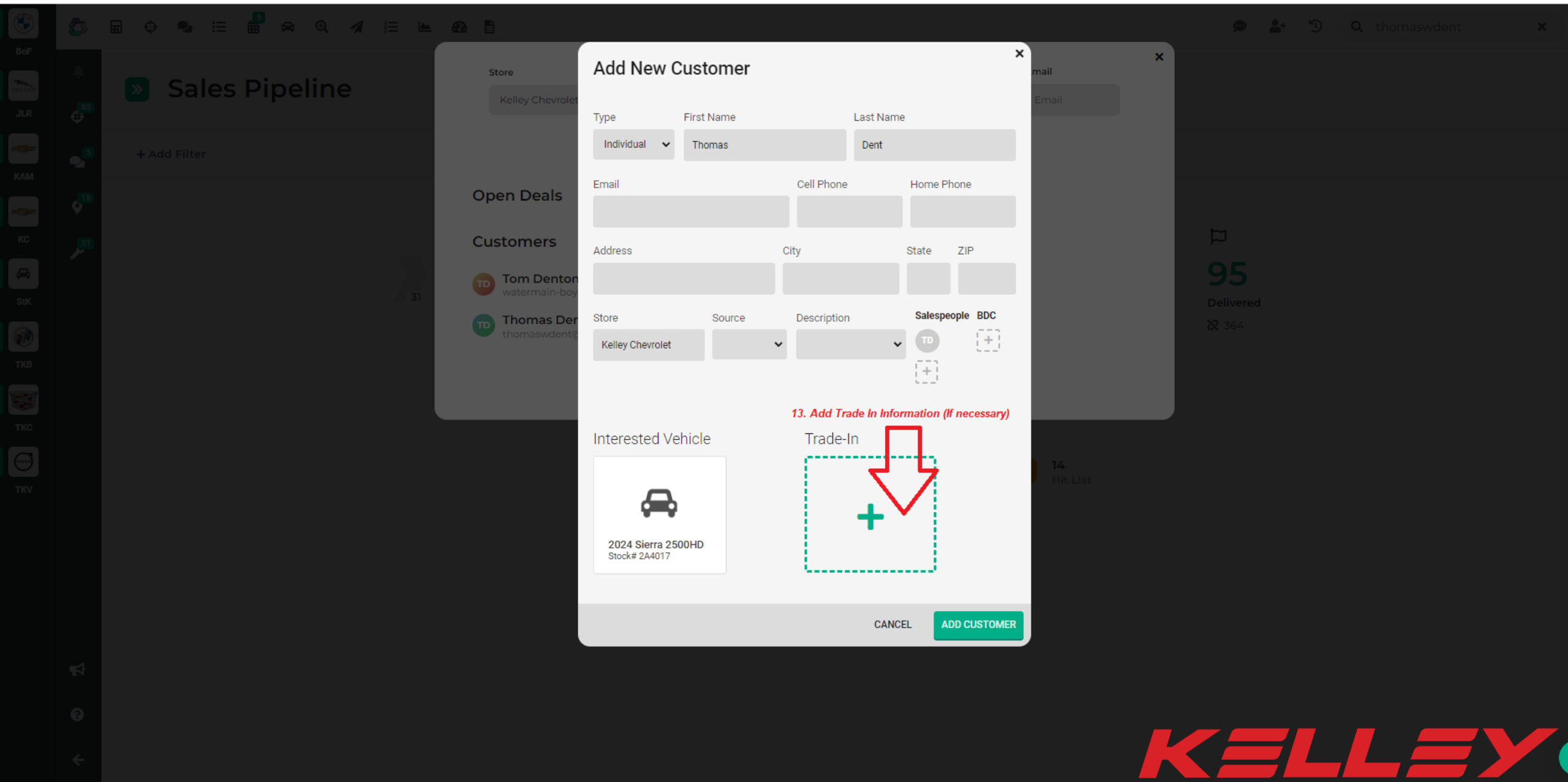
Tom Kelley Buick GMC

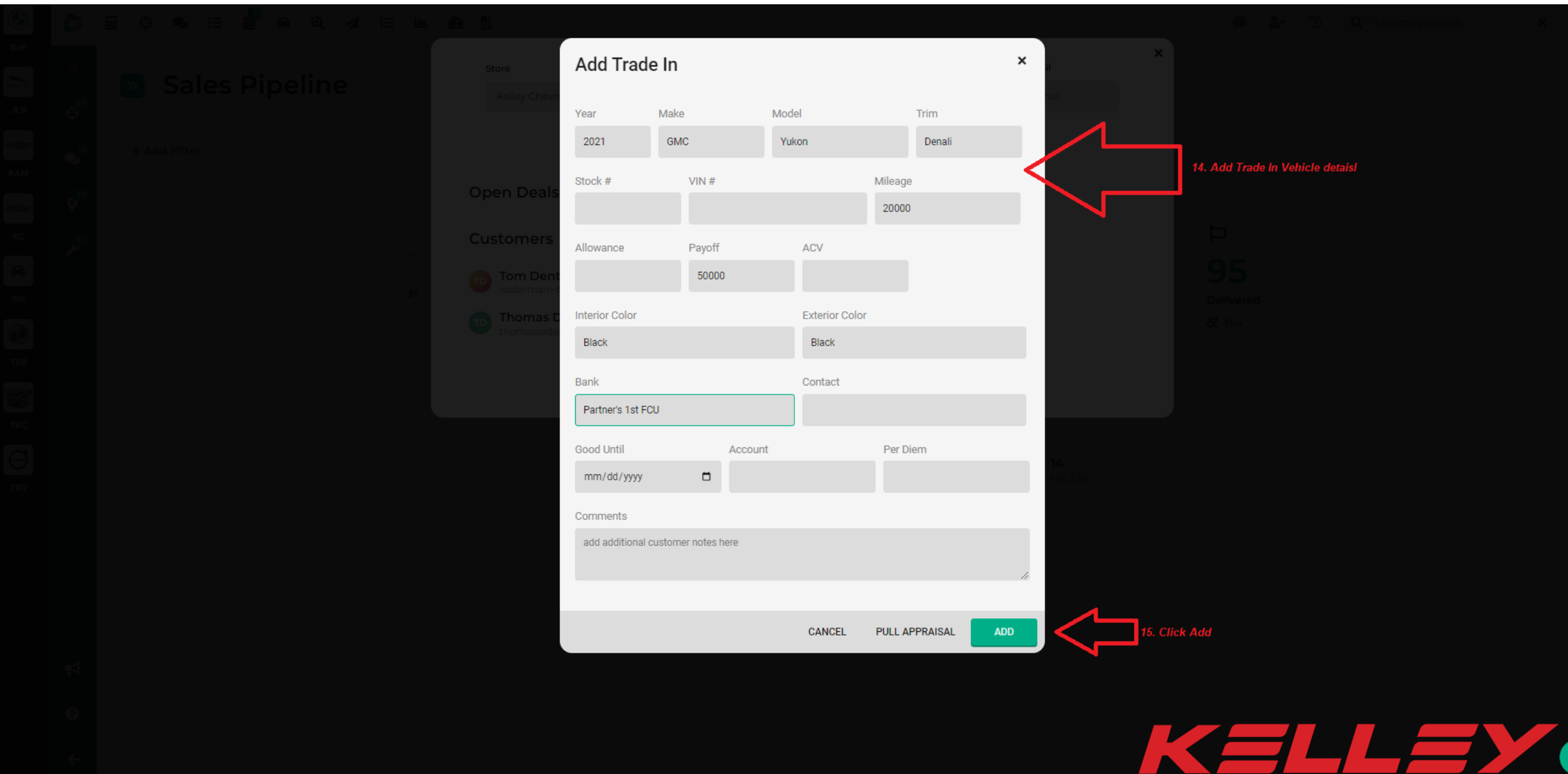


Titanium Rush Me...
Jet Black

Four Wheel Drive
8 Cylinder Engine

0 mi





Add Trade In

Year Make Model Trim

2021 GMC Yukon Denali

Stock # VIN # Mileage

20000

Allowance Payoff ACV

50000

Interior Color Exterior Color

Black Black

Bank Contact

Partner's 1st FCU

Good Until Account Per Diem

mm/dd/yyyy

Comments

add additional customer notes here

CANCEL

PULL APPRAISAL

ADD

14. Add Trade In Vehicle details

15. Click Add

Questions?

- ▶ Tommy Dent
- ▶ 260.417.0034
- ▶ Tdent@KelleyAuto.com

