

KELLEY
MOVING A DEAL FROM SOLD TO DELIVERED
 DriveCentric



[+ Add Filter](#)

 2. Make sure no filters

3. Click here



1. Make sure only your store is highlighted

 4 Snooze

0
Snaps

0
Videos

8
Hit List

+ Add Filter

Engaged 55 Visit 19 Proposal 18 Sold 11 Delivered 11

11 Sold

CUSTOMER	STORE	VEHICLE	DATE SOLD	SOURCE	NEXT TASK	SOLD STATUS	DEAL SALES 1	PHONE COUNT	TEXT COUNT	EMAIL COUNT	VIDEO COUNT
S S2 Architects Llc	Tom Kelley Cadillac		Tue, Jun 13, 2023	Showroom	No Follow-up	Sold	ZW Zach Washington	-	-	-	-
G G & L Corporation	Tom Kelley Cadillac	2021 Cadillac Escalade ESV	Mon, Jun 12, 2023	Phone	No Follow-up	Sold	JA Jason Alt	-	-	-	-
RM Rhonda Miller	Tom Kelley Cadillac	2018 GMC Yukon	Sat, Jun 10, 2023	Internet	No Follow-up	Sold	Ben Gavin	-	-	-	-
AK Amber Kidd	Tom Kelley Cadillac	2023 Cadillac XT6	Wed, Jun 7, 2023	Showroom	No Follow-up	Sold	Jackson Russell	-	-	-	-
JB Jason Beery	Tom Kelley Cadillac	2019 Cadillac CT6	Tue, Jun 6, 2023	Showroom	No Follow-up	Sold	Ben Gavin	-	-	-	-
TC Tyler Chalfant	Tom Kelley Cadillac	2023 Cadillac XT5	Tue, Jun 6, 2023	Showroom	No Follow-up	Sold	Ben Gavin	-	-	-	-
RM Rhonda Miller	Tom Kelley Cadillac	2018 GMC Yukon	Tue, Jun 6, 2023	Internet	No Follow-up	Sold	Ben Gavin	-	-	-	-
DG Dan Gajewsky	Tom Kelley Cadillac	2024 BMW X5	Mon, Jun 5, 2023	Internet	No Follow-up	Sold	Jackson Russell	-	-	-	-
RM Roger Muselman	Tom Kelley Cadillac	2023 Cadillac Escalade	Mon, Jun 5, 2023	Showroom	No Follow-up	Finance	JA Jason Alt	-	-	-	-
KG Kathy Grepke	Tom Kelley Cadillac		Mon, Jun 5, 2023	Phone	No Follow-up	Ordered	Ben Gavin	1	-	-	-
JK James Kelley	Tom Kelley Cadillac		Tue, May 23, 2023	Showroom	No Follow-up	Finance	JK Jim Kelley	-	-	-	-

BoF

JLR

KAM

KC

SK

TKB

TKC

TKV

Sales Pipeline

+ Add Filter

Engaged 55 Visit 19 Proposal 18

11 Sold

CUSTOMER	STORE
S2 Architects Llc	Tom Kelley Cadillac
G & L Corporation	Tom Kelley Cadillac
Rhonda Miller	Tom Kelley Cadillac
Amber Kidd	Tom Kelley Cadillac
Jason Beery	Tom Kelley Cadillac
Tyler Chalfant	Tom Kelley Cadillac
Rhonda Miller	Tom Kelley Cadillac
Dan Gajewsky	Tom Kelley Cadillac
Roger Muselman	Tom Kelley Cadillac
Kathy Grepke	Tom Kelley Cadillac
James Kelley	Tom Kelley Cadillac

Activity

NOTE

Type your note

PLANNED

You have no upcoming tasks.

+ SCHEDULE TASK

PAST

ALL 4 TASKS 0 APPTS 0 NOTES 0 SERVICE 0 PROPOSALS 0 3RD PARTY 0 LOGS 6

👍 Sold • Ben Gavin • Saturday at 3:20 PM

Customer has been sold.

📄 Proposal • Jun 1, 2023 at 7:00 AM

Deal moved to "Proposal."

+ Deal Created • May 26, 2023 at 7:53 PM

Internet : GM Dealer Web - DO - Get ePrice - Us

Deal

ukon #62673C1

Get ePrice - Us

Deal

es

In

App

Done In

Roadmap

Documents

Desk

→ Push

👍 Mark as Unsold

🛑 Snooze

✕ Dead

↔ Transfer

Push Deal

DMS

SEARCH

Credit

PUSH ROUTEONE

DONE

6. Select Search

Review the current customers in the DMS and look for a match to the data in the deal you just worked in the CRM

NOTE: In this case, it appears the only matching attribute of the CRM Data (at top) and those currently in the DMS is the name. Being a fairly common name, we should add a new customer.

Search DMS

RM Rhonda Miller
rmiller1231@icloud.com • • ,

4 Results

ADD AS NEW CUSTOMER

- | | | | |
|-----|----|--|-------|
| 80% | RM | RHONDA MILLER
rmd112318@gmail.com • (260) 341-5010 • 6936 LONDONDERRY LN • FORT WAYNE IN, ... | MATCH |
| 64% | RM | RHONDA MILLER
RONAERNA@EMBARQMAIL.COM • (260) 481-4500 • 6150 S 030 W • WOLCOTTVILLE I... | MATCH |
| 64% | RM | RHONDA MILLER
• (260) 724-9620 • 1103 N 2ND • DECATUR IN, 46733 | MATCH |
| 64% | RM | RHONDA MILLER
• (260) 223-2600 • 2520 YEARLING CT • DECATUR IN, 46733-1157 | MATCH |

DONE

7. Select Add as New Customer

Sales Pipeline

+ Add Filter

Engaged 65 Visit 18 Proposal 18 Sold 11

11 Sold

CUSTOMER	STORE
S2 Architects Lic	Tom Kelley Cadillac
G & L Corporation	Tom Kelley Cadillac
Rhonda Miller	Tom Kelley Cadillac
Amber Kidd	Tom Kelley Cadillac
Jason Beery	Tom Kelley Cadillac
Tyler Chalfant	Tom Kelley Cadillac
Rhonda Miller	Tom Kelley Cadillac
Dan Gajewsky	Tom Kelley Cadillac
Roger Muselman	Tom Kelley Cadillac
Kathy Grepke	Tom Kelley Cadillac
James Kelley	Tom Kelley Cadillac



Activity

NOTE

Type your note

Push Deal

DMS

PUSHING

8. Wait while system pushes to DMS

Credit

PUSH ROUTEONE

DONE

PLANNED

You have no upcoming tasks.

+ SCHEDULE TASK

PAST

ALL 20 TASKS 0 APPTS 0 NOTES 0 SERVICE 0 PROPOSALS 0 3RD PARTY 0 LOGS 28

Sold • Jackson Russell • Wednesday at 4:19 PM

Customer has been sold.

Check-Out • Jackson Russell • May 30, 2023 at 10:08 PM

The customer was checked out of the store.

Visit • May 30, 2023 at 9:08 PM

Deal moved from "Engaged" to "Visit."

- Deal
- les
- In
- App
- Work In
- Roadmap
- Documents
- Desk
- Push
- 👍 Mark as Sold
- 🛌 Snooze
- ✕ Dead
- ↔ Transfer

BoF

RM

JLR

KAM

KC

SK

TKB

TKC

TKV

← Sales Pipeline

+ Add Filter

Engaged 55 Visit 19 Proposal 18 Sold 11

11 Sold

CUSTOMER	STORE
S2 Architects Llc	Tom Kelley Cadillac
G & L Corporation	Tom Kelley Cadillac
Rhonda Miller	Tom Kelley Cadillac
Amber Kidd	Tom Kelley Cadillac
Jason Beery	Tom Kelley Cadillac
Tyler Chaifant	Tom Kelley Cadillac
Rhonda Miller	Tom Kelley Cadillac
Dan Gajewsky	Tom Kelley Cadillac
Roger Muselman	Tom Kelley Cadillac
Kathy Grepke	Tom Kelley Cadillac
James Kelley	Tom Kelley Cadillac

Activity

NOTE

Type your note

PLANNED

You have no upcoming tasks.

+ SCHEDULE TASK

PAST

ALL 5 TASKS 0 APPTS 0 NOTES 0 SERVICE 0 PROPOSALS 0 3RD PARTY 0 LOGS 9

Push To DMS - Initial • Tommy Dent • Today at 8:59 AM

The deal (412265) and the buyer (379180) were pushed to the CDK (Atlas) DMS.

Sold • Ben Gavin • Saturday at 3:20 PM

Customer has been sold.

Proposal • Jun 1, 2023 at 7:00 AM

Deal moved to "Proposal."

Customer: # 379180

Vulcon #62673C1

Get ePrice - Us

Deal

es

In

App

Check In

Roadmap

Documents

Desk

→ Push

👍 Mark as Unsold

🛌 Snooze

✕ Dead

↔ Transfer

Push Deal

✕

DMS

☑ Successfully pushed.

DMS Deal ID: 412265

DMS Customer ID: 379180

Credit

PUSH ROUTEONE

9. Select Done

↓

DONE

NOTE

- ▶ For the deal to move from Sold to Delivered in your Pipeline, you will need to wait for the DMS to Sync with the CRM. This occurs 3 times per day.
- ▶ If you do not see a deal move through after 24 hours, please contact Tommy Dent.

THANK YOU

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