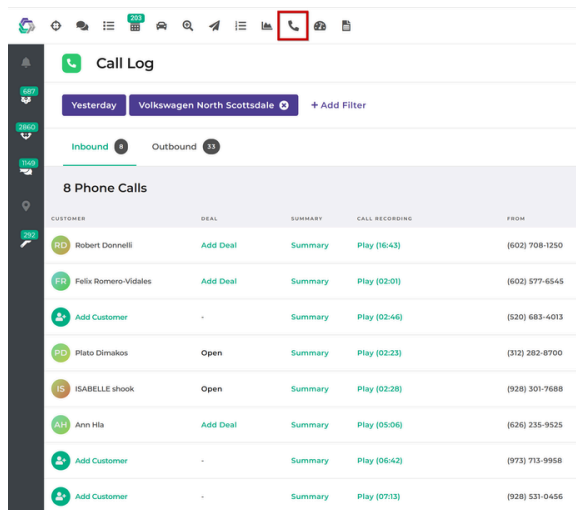


DriveCentric Auditor Checklist

Manage Call Log

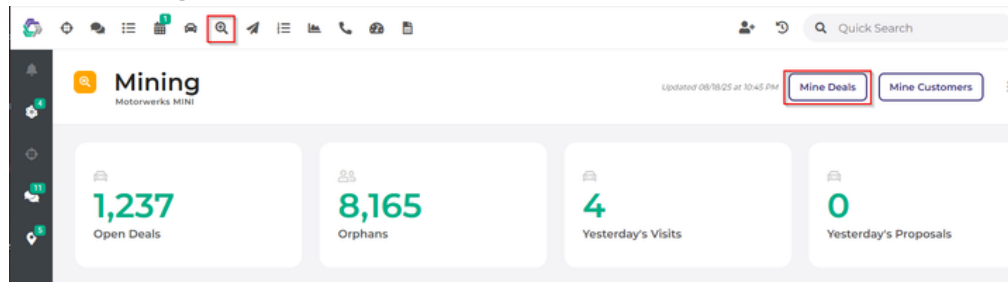


CUSTOMER	DEAL	SUMMARY	CALL RECORDING	FROM
Robert Donnell	Add Deal	Summary	Play (16:43)	(602) 708-1250
Felix Romero-Vidales	Add Deal	Summary	Play (02:01)	(602) 577-6545
Add Customer	-	Summary	Play (02:46)	(520) 683-4013
Plato Dimakos	Open	Summary	Play (02:23)	(312) 282-8700
ISABELLE shook	Open	Summary	Play (02:28)	(928) 301-7688
Ann Hla	Add Deal	Summary	Play (05:06)	(626) 235-9525
Add Customer	-	Summary	Play (06:42)	(973) 713-9958
Add Customer	-	Summary	Play (07:13)	(928) 531-0456

- Review “Summary” for all inbound calls with “Add Deal” or “-” in the DEAL column. If it is an opportunity to do business, click “Add Deal” or “Add Customer” (which will also add a new deal) if there is no name associated yet.

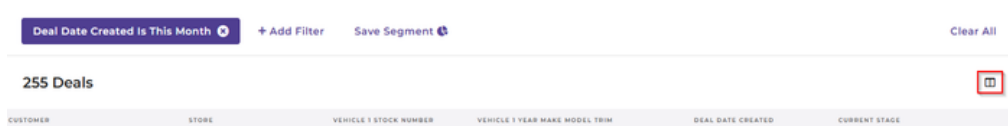
Merging Customers/Deals

Data Mining → Mine Deals



1,237	8,165	4	0
Open Deals	Orphans	Yesterday's Visits	Yesterday's Proposals

+ Add Filter → “Deal Date Created” → This Month (or Last Month depending on audit timeframe)
Customize columns to match the list below



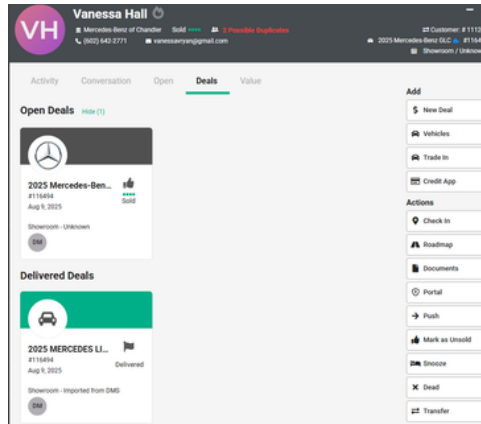
CUSTOMER	STORE	VEHICLE 1 STOCK NUMBER	VEHICLE 1 YEAR MAKE MODEL TRIM	DEAL DATE CREATED	CURRENT STAGE
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Scan for duplicates by filtering by each of the columns you added by clicking on the column header.

Shannon	Acton	(602) 317-6100	Shannon.acton15@gmail.com	Open
Shannon	Acton	(602) 317-6100	Shannon.acton15@gmail.com	Delivered

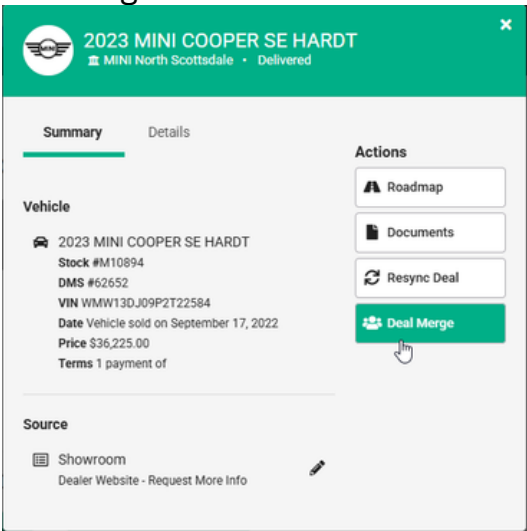
Selected	Reset
Customer	
Customer First Name	×
Customer Last Name	×
Cell Phone	×
Customer Email	×
Deal Status	×
Dead Reason	×
Vehicle 1 Year	×
Vehicle 1 Model	×
Deal Date Created	×

Open the Customer Card and click on “Possible Duplicate” at the top to begin the merge process.



If there’s no duplicate customer record, just a duplicate deal:

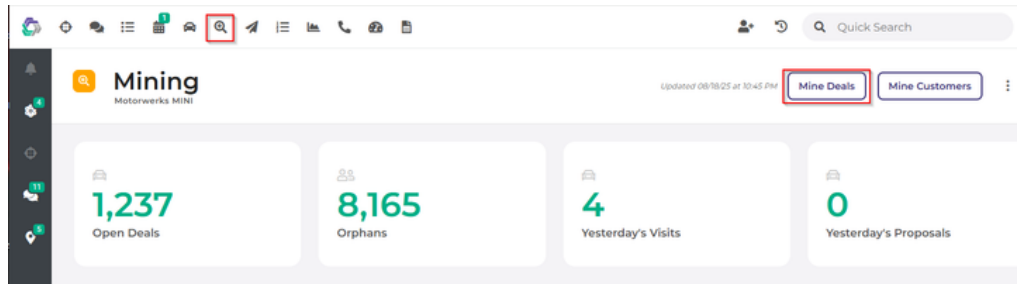
- If both deals are in an open status, open one and mark dead for one of the 6 reasons* below
 - * Bad Contact Info
 - Bad Lead or ILM
 - Dealer Purchase
 - Handraiser / Tradeshow
 - Service / Parts Lead
 - Test Lead
 - Transferred
- Finding a duplicate where one deal is “open” and the other “dead”, look to the dead reason. If it is one of these 6 reasons*, no further action is needed.
- Finding a duplicate where one deal is “open” and the other “dead”, look to the dead reason. If it is NOT one of these 6 reasons*, click through to profile → Deals → click open the deal deal → Rescue → mark Dead for one of the 6 reasons* noted above.
- If one deal is open and the other delivered, click through to the customer record → Deals → open the delivered deal → Deal Merge



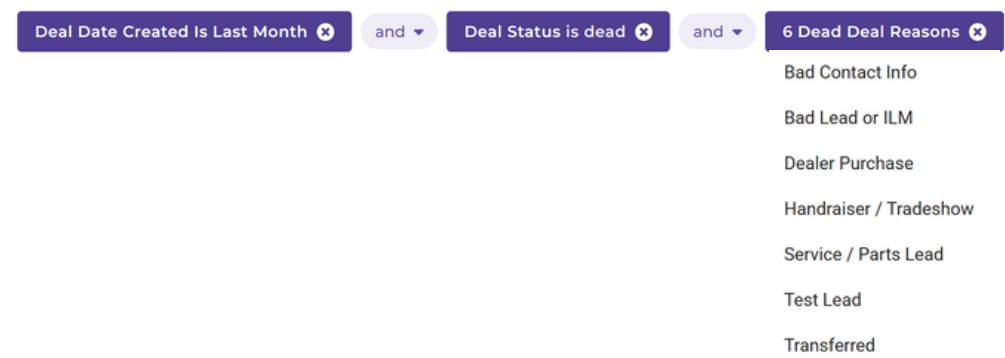
DriveCentric Post-Audit Checklist

Bad Lead Audit

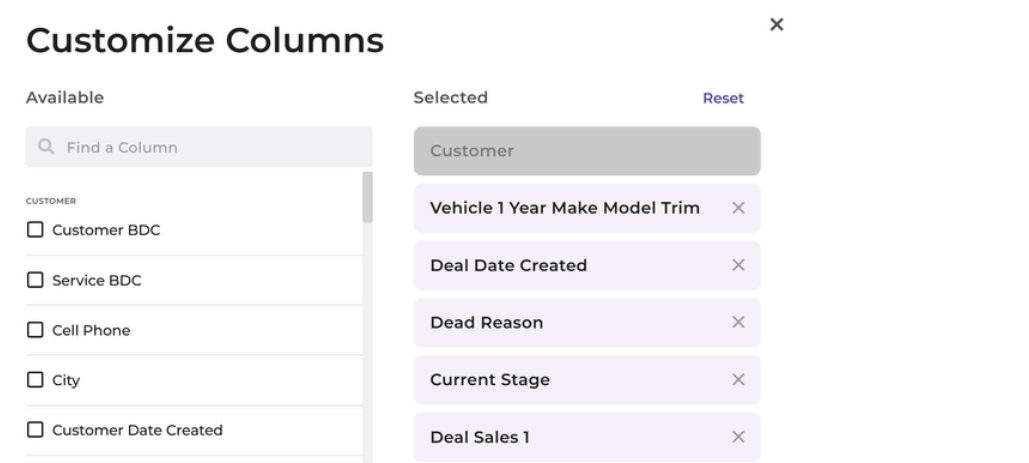
Open Data Mining



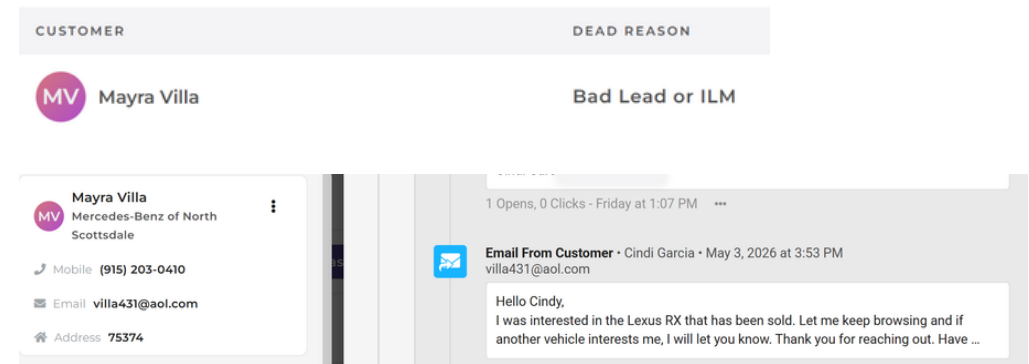
Filter as such (select “current month” when applicable)



Click the book icon to customize columns



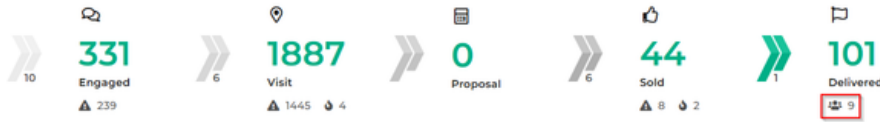
Spot check validity of bad lead claim. Expl: This lead was marked dead due to “bad lead” but the customer is engaged and still in the market for a vehicle:



DriveCentric Post-Audit Checklist

Reconcile Sold Deals

Go to the Sales Dashboard and click on the people icon underneath the “Delivered” stage. This brings up all Sold Deliveries that may have a duplicate in the system.



Click “Select” → Next if you determine they are the same client

MERGE
First, select the duplicate you would like to merge.

STEP 1 OF 3

33%

Current Profile

R

Delivered

Robson Communities, Inc.

EMAIL
jg.robinson@me.com
paula.robinson@robson.com

PHONE
(480) 895-9200
(602) 499-6404
(480) 895-4260

ADDRESS
9532 E RIGGS RD
Sun Lakes, AZ 85248

Delivered Deal

DELIVERED DATE	DEAL NUMBER	INTERESTED VEHICLE
May 7, 2026 - 6:00 PM	85887	2026 Lexus TX Stock #C016942 • VIN #5TDAAB66T5074906

Possible Duplicates 1 1

99%

Robson Communities, Inc.

No Open Deal

Selected

EMAIL
jg.robinson@me.com

PHONE

(480) 895-4260 • (602) 499-6404 • (480) 895-9200 • (480) 883-2715

ADDRESS

9532 E Riggs Rd Sun Lakes, Az 85248

DEAL NUMBER

84917

SALES

95

Ignore Duplicates

Next

If it is not the same customer, click “Ignore Duplicate”