

# LEAD MANAGER

**SPEND LESS TIME MANAGING YOUR LEADS  
& MORE TIME CLOSING SALES**



## What is Lead Manager?

Lead Manager allows you to have more control and insight into the leads you receive and allows you to assign and monitor progress within your dealership. Lead Manager can be accessed within TraderTraxx, the same location as your inventory management, performance metrics, and Market Insights. This tool eliminates the need to bounce between multiple systems to manage your business - offering single platform simplicity for attracting, generating, and managing leads.

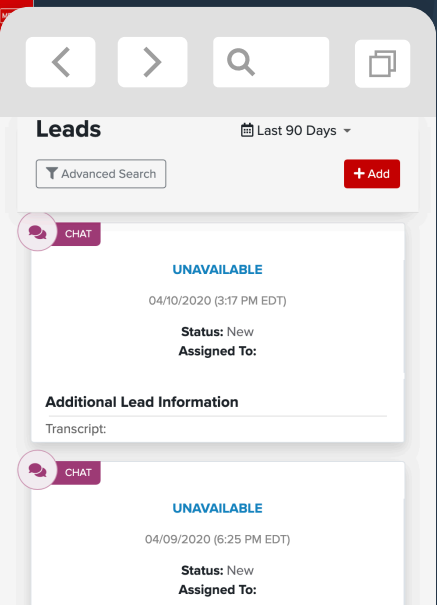
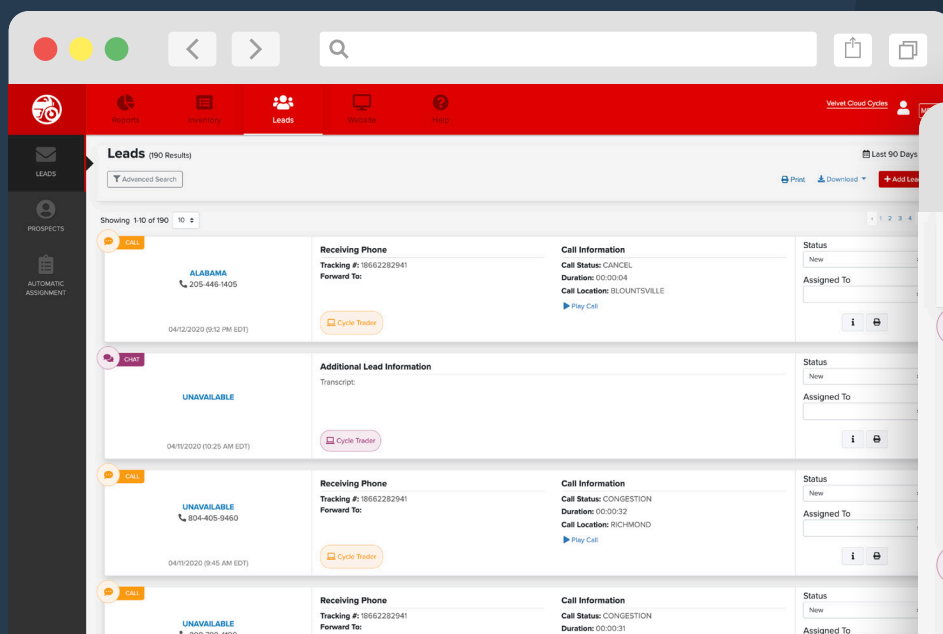
**Note:** By design, not all users in your TraderTraxx account will have access to Lead Manager by default. To grant access to specific users an admin on the account must check "Lead Manager" in the user's User Profile settings page. On this same page, the admin on the account will be able to decide whether or not the individual should receive email notifications when new leads come in.

## Where can I access Lead Manager?

Lead Manager can be found in your TraderTraxx platform for easy access. You will find the tool in place of the "Customers" tab that is located in the top navigation of TraderTraxx. This will now say "Lead Manager." You will no longer see the "Phone Calls, Emails, Messages" tabs on the left-hand side of the page, as this has all been reorganized. Now, you are now just one click away from seeing consolidated Phone Calls, Emails, Text Message, and Chat messages.

## How can I view my list of leads?

When you click on Lead Manager, you will see all leads in a list view, arranged in chronological order - newest leads first. Emails, phone calls, chats, texts, and manually-input leads will all be shown in this list and are denoted by different colors and icons. In their collapsed state, the leads will provide high-level information, such as status, assignee, and model of interest (when available).

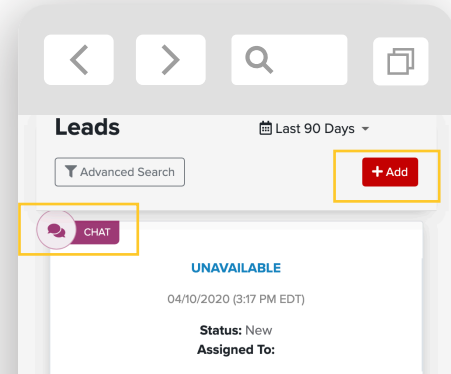


## How can I determine where the lead came from?

From this view, you will also be able to see which source the lead came from, shown at the bottom of the lead card in a colored, rounded rectangle/oval.

## How can I manually enter a lead?

You can simply click the “Add Lead” button at the top-right of the lead list view and fill out the appropriate details.



## How do I get more information on a specific lead?

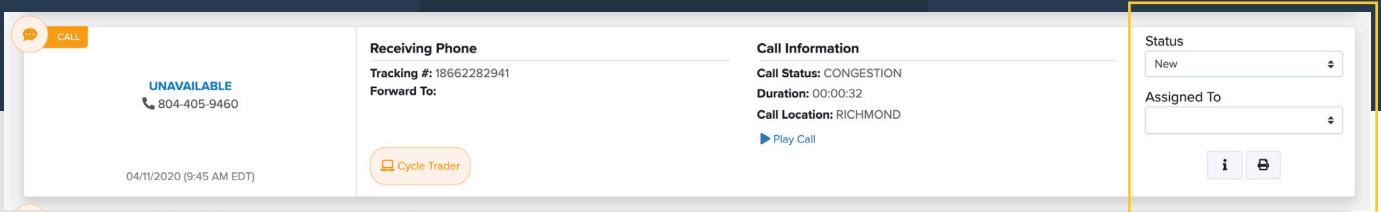
Click the name of the lead or click the “i” icon towards the bottom-right corner of the lead card to expand the lead for more information including notes, the full message that the prospect left in the lead form, Lead Enrichment info, as well as from which unit the prospect submitted their lead. You will also be able to add or edit first and last name, address, preferred contact method, work details, etc.

## What is the lead “Status” and how should I use it?

The “Status” is used to communicate the status of a lead record to the sales representative or manager who may be working or assigning a lead. The status defaults to “New” when it has yet to be worked or assigned.

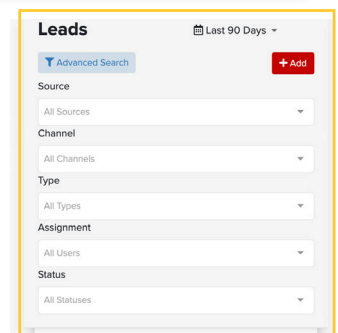
## How do I change the status or the assignment of a lead?

To change a lead’s status, you can simply click the “Status” field from the leads list view or the lead detail view and make a selection. The same can be applied to change who the lead is assigned to. The status of a lead will help when filtering all leads and gives sales managers a high-level understanding of your dealership’s sales pipeline.



## How do I filter a lead?

We have built-in filtering options to allow you to narrow down the exact leads you would like to see in Lead Manager. At the top of the lead list view, there is an “Advanced Search” button which will open the filtering options. You can filter by the lead’s source (website or marketplace,) the channel (email, phone call, text, walk-in,) the type of lead (finance, parts, service, etc.) who the lead is assigned to, and the status of the lead.



## Can I automatically assign a lead?

Yes, the Automatic Assignment feature allows you to create “rules” applied to incoming leads based on certain criteria. To get started setting these rules up, you will need to click “Automatic Assignment” from the left-hand menu. From there, you will choose a lead type with the provided drop-down menu and click “Add Rule.” Once the rule has been created, you can add assignees to the row. Multiple employees can be assigned to a single lead type. If this happens, the leads will be assigned in a “round-robin” fashion. This means that the first lead of that type will automatically be assigned to the first name on this row. The second lead of that type will then be assigned to the second name on that row. The lead assignments will continue to rotate in the same order until a name is removed or added to the row.

