CRM Link: Dealer Socket CRM

Overview

CRM Data is a critical source of Data which the Fullpath CDXP utilizes across various marketing and sales solutions (including CRM Link, Acquire, Nurture) in order to connect and enhance interactions and customer engagements as well as populate the Fullpath Data Lake.

Connecting your CRM to the CDXP

Keep in mind a few very critical points:

1. IF your Dealership *shares one CRM between more than one Dealer rooftop*, custom and extended setup for CRM Link may be required.

2. IF we encounter *issues or bugs with your CRM* (we get it, software isn't always perfect) we are beholden to the ques and SLAs of your CRM provider and therefore extended setup of your CRM Link may be required.

3. Please *make sure the CRM credentials you share with your Customer Success Manager actually work*, as in, you have tried and successfully logged into your CRM with the credentials.

4. Secondly, please *make sure those credentials have access to the relevant reports listed below*. Providing updated credentials with the required permissions for the reports below will enable us to set up your CRM Link more quickly and efficiently.

Permissions and Reports

Each CRM is built differently and has a different set up for the reports it can create. Our system identifies the best reports and pulls metrics from those reports accordingly. The list below describes which reports we use inside of the ***Dealer Socket.***

The login you provide to Fullpath must be able to: ***1)*** *Create Reports and* ***2)*** *Add an* ***external*** *phone number for 2 Step Verification (this should configured in a way that allows a phone number Fullpath may setup and use to authenticate, external to your number).*

APPOINTMENTS

The login you provide to Fullpath should have full access to the Activity Summary Report

LEADS

The login you provide to Fullpath should have full access to the List Builder in order to pull Lead information.

SALES

The login you provide to Fullpath should have full access to the Gross Profit Report in order to pull customer information on those entities marked as SOLD.

OTHER

The login you provide to Fullpath must be able to export reports so that we can pull this data into our platform on a regular basis.

Time to Completion

If your Customer Success Manager is provided with up to date logins, which have the necessary access and permissions to all the reports and abilities listed above, then **we endeavor to complete the CRM Link setup within 3 business days.**

*Exceptions to this are listed above, **see critical points**.*