



## CRM Link: VinSolutions

CRM Data is a critical source of Data which the Fullpath CDXP utilizes across various marketing and sales solutions 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:

You will need to provide Fullpath with *independent login credentials*, i.e. a username and password that will be used only by Fullpath for the purposes of CRM Link. This ensures that we can continually maintain the connection between your CDXP and your CRM without interruption of service.

1. Please *make sure the CRM credentials you share with Fullpath are accurate*. We ask that you complete a test sign in using the credentials you intend to share with Fullpath prior to sending them to your Implementation and/or Customer Success Manager; keeping in mind that this sign in is **case sensitive**.
  - o **Please note:** It is essential that the credentials provided to Fullpath are case sensitive. If any capital/lowercase letters are provided to Fullpath incorrectly, it may cause connection errors.
2. IF your Dealership *shares one CRM between more than one Dealer rooftop*, custom and extended setup for CRM Link may be required.
3. IF we encounter *issues or bugs with your CRM* (we get it, software isn't always perfect) we are beholden to the queues and SLAs of your CRM provider and therefore extended setup of your CRM Link may be required.
4. IF you have *any IP restrictions on the account* please remove them or contact the Fullpath team to discuss.
5. 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 VinSolutions CRM.

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 be configured in a way that allows a phone number *Fullpath may setup and use to authenticate, external to your number*).

In order for Fullpath to create the reports for Appointments, Leads, and Sales we have to have Edit access to Custom Reporting for our VinSolutions login. You can enable this permission in the Reporting Settings menu in VinSolutions, found in the screenshot below:

The screenshot shows the VinSolutions CRM interface. The top navigation bar includes CRM, Inventory, Desking, Communications, Campaigns, Websites, VinLens, Insights, and Settings (highlighted with a red box). Below this is a sub-menu with Dealer Settings, My Settings, Users (highlighted with a red box), Sales Goals, and Billing. The 'Reporting User Setup' section is visible, with a dropdown menu open for 'Users'. The dropdown menu includes User List, Recent Logins, Manage User Groups, Marketing Admin, and Reporting Settings (highlighted with a red box). Below the dropdown is a table with columns for Allow Access, Allow Edit, Feature, First Name, Last Name, and User Access. The 'Reporting Settings' row has the 'Allow Edit' checkbox checked.

Allow Access	Allow Edit	Feature	First Name	Last Name	User Access
<input type="checkbox"/>	<input type="checkbox"/>	Manage Vehicles	Auto	Lead	Account Manager
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Custom Reporting	Auto	Lead	Account Manager

In this menu, make sure that the Allow Edit box is checked in the Custom Reporting line for our login, as shown below:

Allow Access	Allow Edit	Feature Search Feature	First Name Search First Na	Last Name Search Last Na	User Access Search User Ac	User Name auto
<input type="checkbox"/>	<input type="checkbox"/>	Manage Version Sharing	Auto	Lead	Account Manager	autoleadstar14319
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Custom Reporting	Auto	Lead	Account Manager	autoleadstar14319
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Connect Reports and My Dashboard	Auto	Lead	Account Manager	autoleadstar14319

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## APPOINTMENTS

The login you provide to Fullpath should have full access to Insights and be able to create reports therein.

## LEADS

The login you provide to Fullpath should have full access to Insights and be able to create reports therein.

## SALES

The login you provide to Fullpath should have full access to Insights and be able to create reports therein.

## 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 VinSolutions CRM Link setup within 5 business days.

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