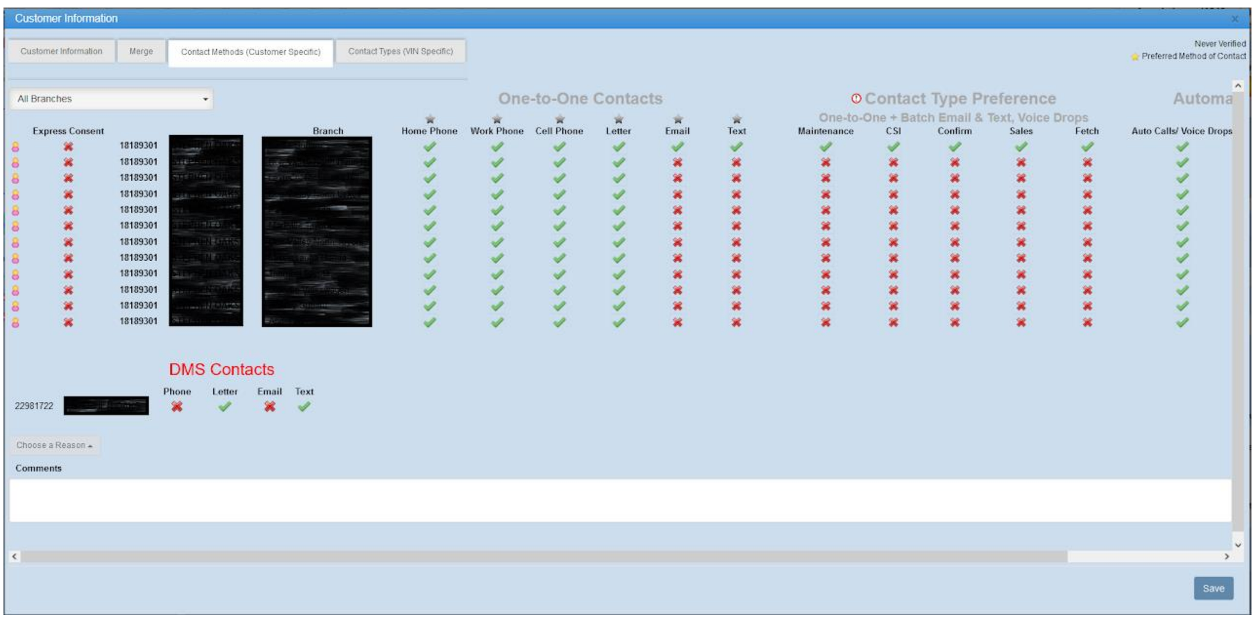
Turn Off by Branch

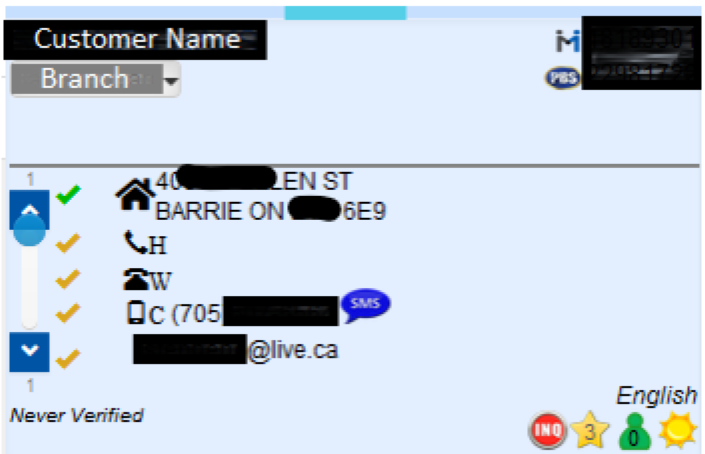
We have implemented a brand-new feature across all databases called “Turn Off by Branch”. This feature is now standard DealerMine functionality, **<u>but only impacts those databases that have a branched setup</u>**. We now allow you to manage contact preferences at the branch level rather than the customer level, so you have more flexibility and control over which branches are allowed to contact customers and by what methods.

For customer profiles belonging to a branched store, the customer information popup will now look as follows (*note, the available branches displayed are based on user access*):

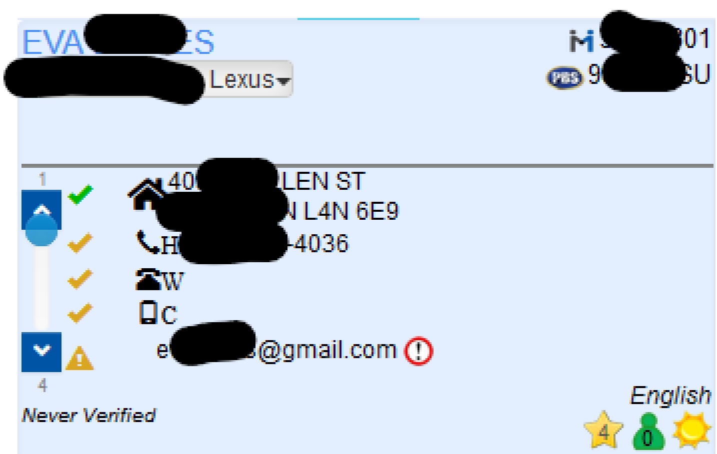


If a customer calls branch 1, for example, and asks to no longer receive emails, you can turn off email for branch 1 without affecting the ability of other branches to send emails. The functionality is otherwise the same as it always was, you are simply managing it at the branch level now rather than having one set of preferences that must be used across branches.

The 2nd main change is to the customer profile itself:



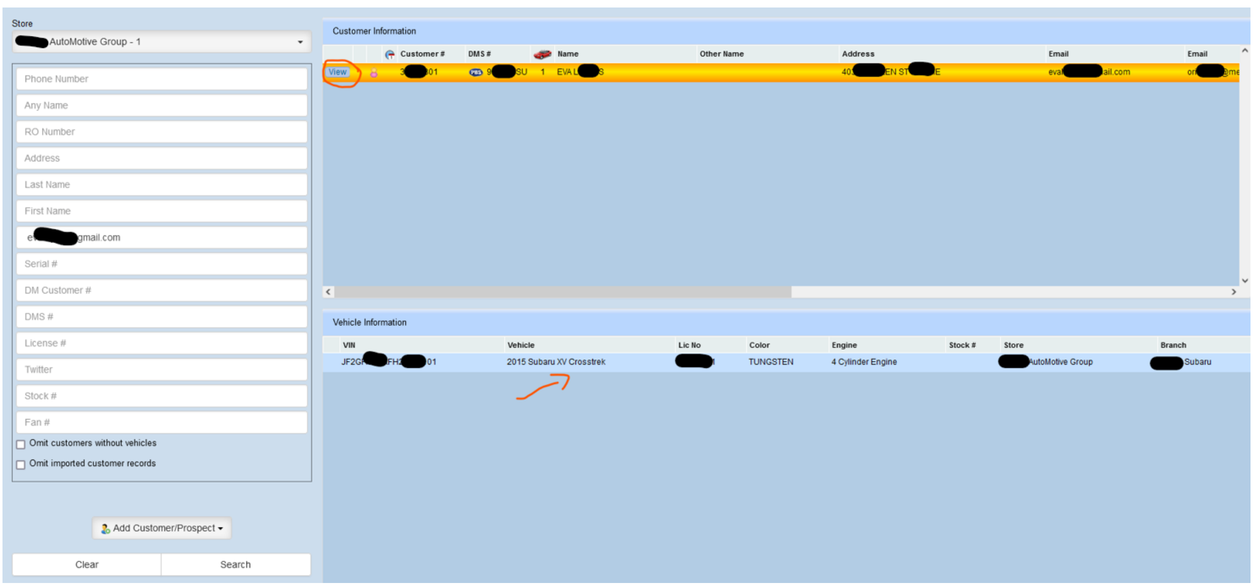
You will note that there is now a drop-down menu under the customer's name. This is to identify the branch information that is being displayed regarding contact preferences, since they can now be different from one branch to another. In the attached screenshot, the green/amber check marks identify the turn off/contact preferences for this customer for the Subaru branch only. If you want to know if they can be contacted on behalf of a different branch, select the branch from the drop-down to see the contact preference icons. Here is the same customer but with a Lexus branch selected:



It's important to be sure that the contact preferences being displayed are the ones for the correct branch being inquired. For example, if they called to speak to the Lexus branch, ensure the Lexus branch is selected in the drop down. This is more important for Outbound calls to ensure you are contacting customers via appropriate methods that have not been turned off, therefore abiding by CASL and DNC legislation.

To make this as smooth as possible, anytime you access a customer profile via an inquiry that has a branch attached, we will default the profile drop-down to the correct branch. This means if you reach a customer profile by pulling from call select, clicking from the appt schedule, web leads, traffic log, fetch etc… it will properly default to the correct branch based on where you inquired from.

The one thing to take note of is when using the Search function. Currently, when you search a customer, the result looks something like this:



Typically, users would click the “View” button under “Customer Information” to access the customer profile. **<u>Going forward, we highly recommend users now access the customer profile by double clicking anywhere on the vehicle row under “Vehicle Information”</u>**. The reason being, clicking on the customer row (View button) is not branch specific, and will therefore default the profile drop-down to the 1st branch the user has access to. Whereas, if you click the vehicle row to access the customer profile, this is branch specific and will therefore default the drop-down to the correct branch.