

TargetCRM Mobile App



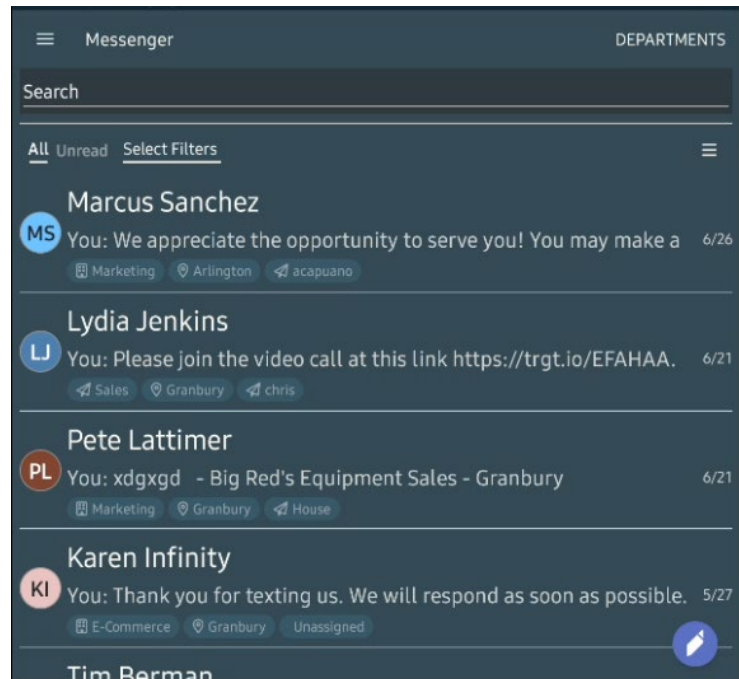
As part of your TargetCRM/Notify360 solution, you have the option of using our free TargetCRM smartphone app, available for Apple® and Android® devices. The app can be found in the related app stores, you will login using the same *user*, *password*, and *dealer #* used to access your DMS and TargetCRM/Notify360 web.

Mobile Tools

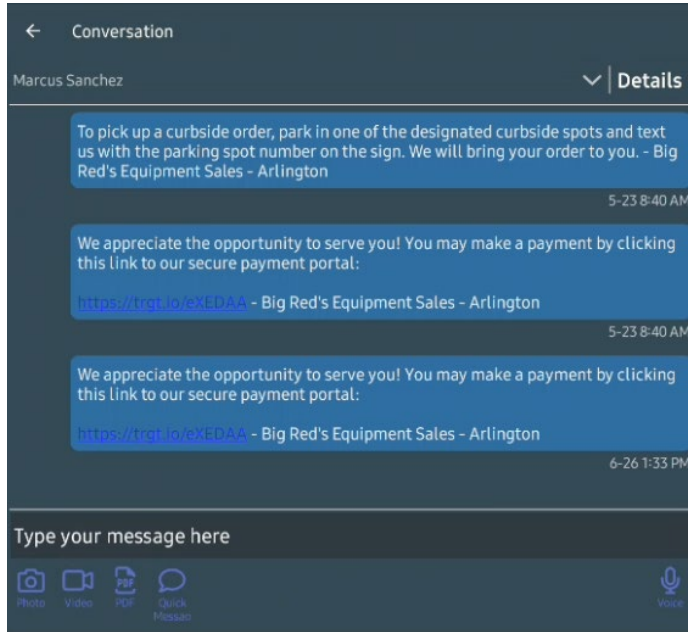
Messenger

This screen allows you to view all ongoing conversations with your customers, and respond to them in real-time from your mobile device.

- The **Departments** button allows you to limit your display to text messages from the correct department.
- The *Search* field allows you to find messages by customer name or phone number.
- You can choose to view All messages, Unread messages, or Select Filters to use the same filters you can find in other TargetCRM/Notify360 screens.
- The stylus button allows you to start a new message by looking up the customer, and starting a text.



TargetCRM Mobile App



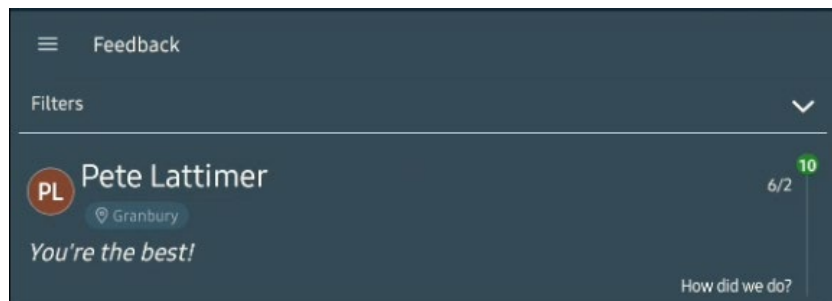
Once you select a message, the conversation display on your screen, and you can type in your message. You also have a variety of other tools:

- The Details button will open the customer's details on screen.
- The buttons at the bottom of the screen will allow you to attach a Photo from the camera or gallery, send a Video or invite the customer to a video call, attach a PDF, access your Quick Messages or use Voice to text.

When new messages arrive your app can send you notifications.

Feedback

Your **Feedback** screen allows you to view results from your customer satisfaction **Surveys** from your mobile device. Your mobile app can send you a notification when a new survey arrives.

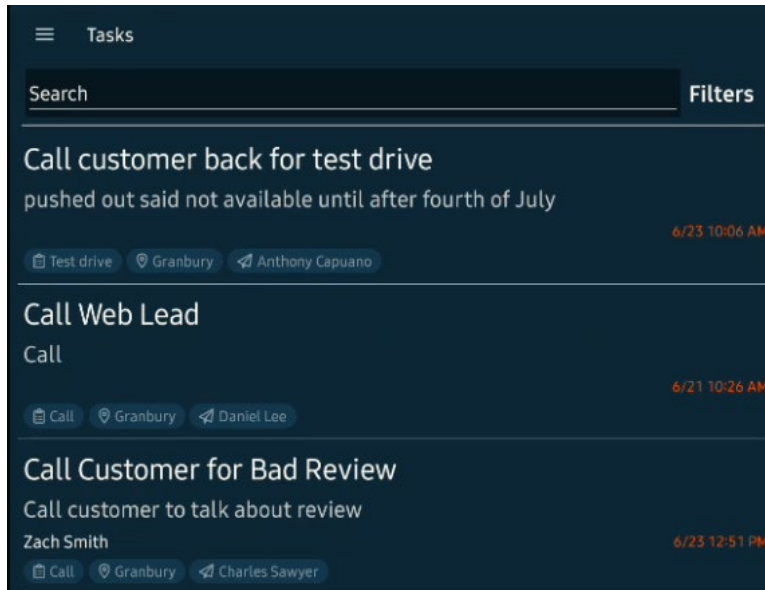


Here you can view the customer who completed the survey, what score they gave you, when they completed the survey, their comment, and which location they are a customer at (if applicable). These results can be Filtered to display the relevant results.

TargetCRM Mobile App



Tasks



Your **Tasks** screen will display tasks that have been assigned at your business. New tasks assigned to you can send app notifications, and you can use the Filters to view only the tasks relevant to you.

- In each task you can view the task name and comments, what kind of task it is, who it is assigned to, and which location it is for.
- Each task also includes the date and time it is due.
- After selecting a task you can Reschedule it or mark it as Done.
- You can also use the plus sign button to add a new task from mobile.



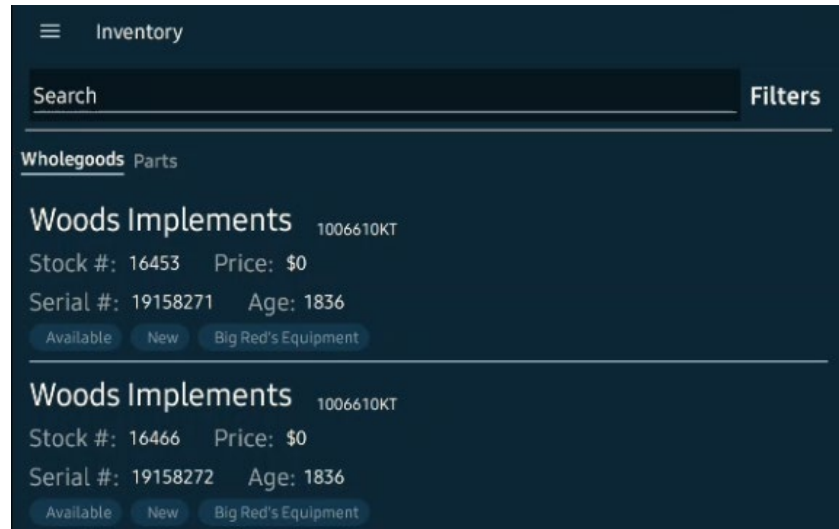
TargetCRM Mobile App



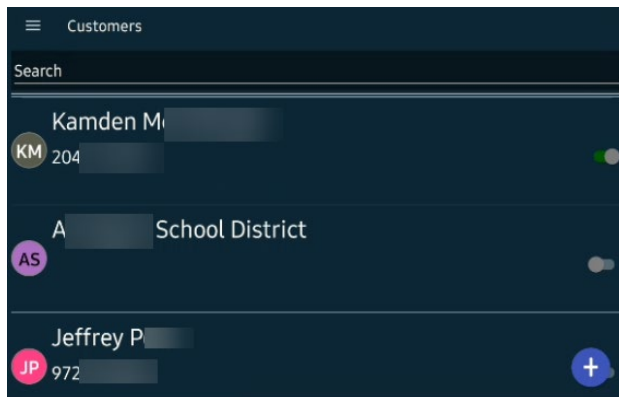
Inventory

Your **Inventory** screen allows you to view, *Search* and *Filter* through *Wholegoods* and *Parts* that you have on file inside TargetCRM/Notify360 and your DMS.

This can allow you to check your current stock when away from your computer.



Customers



Your **Customers** screen allows you to view and edit the same customer records that you can access from inside TargetCRM/Notify360 or your DMS.

- The slider to the right controls whether the customer is opted-in for marketing **Broadcasts** and **Surveys**.
- You can use the *Search* bar to find specific customers, and the plus sign button to add a new customer record.
- Opening a record displays all customer information available from TargetCRM/Notify360.

TargetCRM Mobile App



Deals

The **Deals** screen grants you remote access to all your TargetCRM/Notify360 **Deals** pipelines. From here you can *Search* for a deal, or Filter your results to only the deals that matter most to you.

- Similar to the standard TargetCRM/Notify360 **Deals** screen, drag a deal card into a new stage, or open the deal to make edits.
- To add a new deal from mobile you can use the plus sign button.
- Changes made to deals via the mobile app will sync with TargetCRM/Notify360 immediately (assuming a steady internet connection).

☰ \$530,682.60 - 38 Deals

RELOAD

Search

Filters

Current Pipeline: Sales

☰

New Lead	Contacted	Demo	Quoted
\$51,000.00 4 Deals	\$111,000.00 7 Deals	\$71,199.99 6 Deals	\$192,195.62 7 Deals
Matt Lowery - Zturn Matt Lowery ☰ 1 task scheduled Anthony Capuano \$10,000.00 10d	Tim Berman Tim Berman ☰ 0 task scheduled House Account \$0.00 21d	Ronny Naylor - Ronny Naylor ☰ 1 task scheduled Andrea Dixon \$20,000.00 21d	cody trahern cody trahern ☰ 0 task scheduled Brett Bagwell \$80,000.00 105d
Rocky Flores - Diesel unit Rocky Flores ☰ 0 task scheduled Brett Bagwell \$40,000.00 31d	Michael D. Cooper Michael D. Cooper ☰ 2 task scheduled Dennis W Taylor \$2,500.00 105d	Lydia Jenkins Lydia Jenkins ☰ 0 task scheduled House Account \$5,000.00 275d	Larry Brunson - WON - Zturn Simplicity Larry Brunson ☰ 1 task scheduled Brett Bagwell \$40,000.00 135d
PAUL SYPTAK - Diesel unit PAUL SYPTAK ☰ 0 task scheduled	Robert Walker - 25ft white Robert Walker ☰ 0 task scheduled	Larry Hale Tractor Larry Hale ☰ 1 task scheduled	Landon Brown Web lead Landon Brown +