

ID Drive Work Flow 700Credit Generated Lead

Sales

- Lead Created for ID Drive through 700Credit Promotion SalesForce Lead Notes
- Opportunity for ID Drive is created SalesForce Task
- Complete ID Drive Dealer Agreement Request Form
https://elendsolutions-ouqbg.formstack.com/forms/id_drive_dealer_agreement_request_form. For groups there is an add on form
- Update Opportunity stage to "Pending Closed Won"
- ID Drive Opportunity marked closed won, AFTER dealer has completed ELEND Contract.
- Create Additional Opportunities for Add On Products
- Insert Information from Confirmation Email or EMAIL into Ancillary. (NEED INSTRUCTIONS)
- Create ancillary select ID Drive, also select add on products dealer would like in **SAME** ancillary. Be sure to capture correct Implementation and Training contacts.

Compliance

- Enter Pricing for add on's ONLY Elend is billing for Scanners
- Make sure if QQS we enter Bundle Pricing, QQI Is Bundles and ID Verification is per Transaction

Elend

- Elend will send agreement, copy sales team and management
- Once Dealer is Signed, they will schedule kickoff and invite 700Credit implementation team

Setup

- Setup ancillary products, send id's over to ELEND
- Move to implementation queue

Setup

- Setup ancillary products, send id's over to ELeND
- Move to implementation queue



Implementation

- Once Assigned, task created with ID Drive instructions
- Send Welcome Email
- Obtain Install date from Elend
- Call customer and ensure install date is accurate
- After Install, make sure products are being ordered and delivered consistent with the ancillary and customers expectations
- QSI & ID Verification Should be Automated with every scan. QQI is manual
- If none ordered CROSS SELL
- Verify they seeing results in ELeND.
- Make sure they are aware of indicators in ELeND

SalesForce Task

ID Drive Work Flow Elend Generated Lead

Sales

- Lead Generated for ID Drive by Elend
- Opportunity for Add on products only
- ~~Complete ID Drive Dealer Agreement Request Form~~
~~https://elendsolutions-ouqbg.formstack.com/forms/id_drive_dealer_agreement_request_form~~. For groups there is an add on form
- ~~ID Drive Opportunity marked closed won, AFTER dealer has completed ELENd Contract.~~
- ~~Create Additional Opportunities for Add On Products~~
- ~~{Insert Information from Confirmation Email or EMAIL into Ancillary. (NEED INSTRUCTIONS)}~~
- Create ancillary select ID Drive, also select add on products dealer would like in SAME ancillary after dealer has signed eLend Agreement. Be sure to capture correct Implementation and Training contacts.

SalesForce Lead Notes



Lead

PD Test Lead Source 700Credit

Details Related DocuSign Activity

Company	Dealership	Lead Status	Open
Name	PD Test Lead Source 700Credit	Type	ID Drive
Title		Taken By	
Test Distribution Checkbox	<input type="checkbox"/>	Lead Owner	Ken Hill
Lead Source	Web Form - 700Credit		
Affiliate			
Distribution Text Formula			
Distribution Value			
Powerform New Customer	<input type="checkbox"/>		
Formula Test Checkbox	<input type="checkbox"/>		
Account Time Zone			

Contact Information

Address	1213 Main City, AL 12345	Phone	(123) 456-7777
Website		Email	test@test.com
		Mobile	

Notes Section

Notes	asdf *** SPECIAL LEAD INSTRUCTIONS ***. 700Credit Generated lead for ID Drive . Sell them on the benefits of the scanner bundled with our additional services. Automated QSI, our favorite, every scan is prescreened and score is shown in elend platform. or Automated IDV, automatically run does IDentity verification with a Synthetic ID check with results displayed in elend software as an option or QQI, consumer opts in at time of scan and prequalification is run, Do not create an opportunity for the IDDrive, only opportunity for add ons.
Reasons Not Interested	

Details Related DocuSign Activity

Company	Dealership	Lead Status	Open
Name	PD Test eLend facing form new	Type	ID Drive
Title		Taken By	

Test Distribution Checkbox	<input type="checkbox"/>	Lead Owner	 Ken Hill
----------------------------	--------------------------	------------	--

Lead Source	Web Form - ELEND / ID Drive
Affiliate	ELEND / ID Drive

Distribution Value	
Powerform New Customer	<input type="checkbox"/>
Formula Test Checkbox	<input type="checkbox"/>
Account Time Zone	

▼ Contact Information

Address	1213 Main City, HI 12345	Phone	(123) 456-7777
---------	-----------------------------	-------	----------------



Website		Email	test@test.com
		Mobile	

▼ Notes Section

Notes	asdfawe *** SPECIAL LEAD INSTRUCTIONS *** ID Drive lead from ELEND. Elend has sold their IDDrive scanner and dealer is interested in the add on products Automated QSI, our favorite, every scan is prescreened and score is shown in elend platform. or Automated IDV, automatically run does IDentity verification with a Synthetic ID check as an option or QQI, consumer opts in at time of scan and prequalification is run,
Reasons Not Interested	

▼ Lead Information

Additional Products to Sell with ID Drive

700credit.lightning.force.com/lightning/r/Task/00T1T0000AsSFvIUQW/view?ws=%2Fflightning%2Fr%2FOpportunity%2F0061T00000yAstuQAC%2Fview

Apps | Yahoo Mail | Salesforce | 700Dealer | 700Dealer Test Box | AuditBoard | Agiloft | SP - ODE Home | MyAnalytics | HESAA Welcomes Y... | ufrsdcalendar | 700C Public System... | DT migration forms... | Reading list

700Credit

Search...

700 Admin (Lightni... | Reports | DealerTrack Migration | Vetted DT Access TR... | autoapr - Search | AutoAPR | 700Credit Test Accou... | 700Credit Test Accou...

700Credit Test Ac... | Addition... | 700Credit Test Account-NewOne

Details | Related

Task Information

Subject	Additional Products to Sell with ID Drive	Status	Not Started
Type	Task	Priority	High
Due Date	1/10/2022	Name	
Assigned To	Ken Hill	Related To	700Credit Test Account-NewOne
Created By	Ken Hill, 1/10/2022 5:00 PM	Call Object Identifier	
Reminder Set	No reminder is set	Related Who Type	
Process Used		Related To Type	Opportunity
Related Record Type	Opportunity	WhoID 18-Digit ID	
Type of Related Record	Opportunity	# of Tasks	1.00
Related Lead Source	Called in for Information	Initial Engagement	<input type="checkbox"/>
Call Time - Minutes	0	Discovery	<input type="checkbox"/>
Widget Task	0.00		
Implementation Wrap Up Codes			
Implementation Wrap Up Sub Codes			
Call Duration			

Comments Related to Task

Comments	You have created an ID Drive Opportunity. Remember to Sell Automated QuickScreen, Automated ID Verification or Manually initiated prequalification. Create opportunities for each product that customer is interested in. Also only one Ancillary for ID Drive and add on other products to be setup for.
Time Zone	
Last Modified By	Ken Hill, 1/10/2022 5:00 PM
Task Completed Time	

History | Recent Items | HTML Email Status

ID Drive Ancillary Assigned, ELe...Process Builder | Salesforce

700credit.lightning.force.com/lightning/r/Task/00T1T0000AvMziuUQC/view?ws=%2Fflightning%2Fr%2FAncillary_Products_Setup__c%2Fa091T00000WPTJvQAP%2Fview

AppsYahoo MailSalesforce700Dealer700Dealer Test BoxAuditBoardAgiloftSP - ODE HomeMyAnalyticsHESAA Welcomes Y...ufsdcalendar700C Public System...OT migration forms...Reading list

700Credit

Search...

700 Admin (Lightni...DashboardsDealerTrack MigrationCompliance Dashbo...CM - TOTAL Complet...700Credit Test Accou...700Credit Test Accou...Ken Test ID Drive An...

Ken Test ID Drive ...ID Drive...Ken Test ID Drive Ancillary

DetailsRelated

Task Information

Subject	ID Drive Ancillary Assigned, ELe...Follow up Tasks	Status	Not Started
Type	Task	Priority	High
Due Date	1/11/2022	Name	
Assigned To	Stephanie Desrosier	Related To	Ken Test ID Drive Ancillary
Created By	Ken Hill, 1/11/2022 10:44 AM	Call Object Identifier	
Reminder Set	No reminder is set	Related Who Type	
Process Used		Related To Type	Ancillary Products Setup
Related Record Type		WhoID 18-Digit ID	
Type of Related Record		# of Tasks	1.00
Related Lead Source	None	Initial Engagement	
Call Time - Minutes	0	Discovery	
Widget Task	0.00		
Implementation Wrap Up Codes			
Implementation Wrap Up Sub Codes			
Call Duration			

Comments Related to Task

Comments	Send Welcome Email. Call Elend and obtain installation dates, notify ELe...that you would like to be included in those calls. Call Dealership make sure they understand ELe...Expectations. Verify products that they have ordered along with ID Drive, if they have not cross sell. Automated QuickScreen, Automated ID Verification with Synthetic Fraud and manual prequalification. Once up and running verify they are seeing results and product indicators in ELe...and can view product data.		
Time Zone		Interaction Details Link	
Last Modified By	Ken Hill, 1/11/2022 10:44 AM	Call Result	
Task Completed Time			

HistoryRecent ItemsHTML Email Status