

## Dealersocket Process for NOT OWNED Vehicles

- If customer advises that they **no longer own the vehicle**:
  - Search for the entity in Dealersocket
  - Under the “Vehicle Records” section of the entity, locate the vehicle, click on the 3 dots on the right hand side and select “Change Ownership Status” option and select Yes to confirm and save.

The screenshot displays the Dealersocket interface for a customer named Mr. Shayne Wilson (Customer ID 3124). The interface is divided into several sections:

- Customer Profile:** Located on the left, it includes tabs for CUSTOMER, CONNECTIONS, and LOYALTY. The CUSTOMER tab is active, showing a profile for Mr. Wilson with fields for Attention, Joint Name, Special Notes, M, Home Phone, and W. A "PRIVATE" label is visible.
- All Open Tasks (1):** Below the customer profile, it shows an "Email Received" task. The email is from "Open / Service Reminder Bucket" and was received on 04/06/2019 at 10:31:49 AM. It includes an attachment and a note: "NEW EMAIL RECEIVED FROM CUSTOMER. PLEASE CHECK WORKNOTES."
- Vehicle Records:** On the right, the "VEHICLE RECORDS (1)" tab is selected, showing 1 open RO and 2 closed. Below this, a list of vehicles is displayed. The first vehicle is a "2012 Holden Captiva" with status "Owned". It was last serviced 2 months ago. A dropdown menu is open next to the vehicle, showing options: "Change Ownership Status" (highlighted with a red box) and "Delete Vehicle".

**This will stop Dealersocket from sending any communication to the customer regarding that vehicle including future Service reminders and anniversary reminders.**