

DEALERSHIP CRM ADMINISTRATOR CHECKLIST

Run the Daily jobs every morning, the Weekly jobs on Monday, the Monthly jobs in the first week of the month and the Quarterly jobs once a season. Tick each job when it is done and note anything you changed. Name every lead source with the rules on the Naming rules page, and keep the Lead source register current so the next administrator inherits a map.

CHECKLIST

	Cadence	Area	Job	Where in LeadLocate	Notes
☐	Daily	Lead sources	Check that every lead source delivered as expected today.	Lead Source Settings: Last Lead Received	
☐	Daily	Lead sources	Read the Activity Log for any delivery marked Parse failed, Feed inactive or Intake unknown.	Lead Source Settings: Activity Log	
☐	Daily	Leads	Assign any lead that has no owner.	Leads view	
☐	Daily	Workspace	Clear overdue appointments, reminders and to-dos.	Workspace	
☐	Daily	Phones	Check missed calls and voicemails from the day before have an owner.	Calls, communications timeline	
☐	Weekly	Data	Merge duplicate records.	Merge Duplicate Records	
☐	Weekly	Users	Review new users and anyone who left. Switch off departures the same day.	User Management: Disable, Switch off	
☐	Weekly	Routing	Confirm the round robin rotation matches who is on the floor this week.	Round robin settings per person	
☐	Weekly	Phones	Read the call alerts and flag calls for coaching.	Call Alerts, Alert Keywords	
☐	Weekly	Quality	Spot check five new leads for source, owner and first text.	Lead record and timeline	
☐	Weekly	Quality	Send a Quality Control Request for any LeadLocate lead with a dead number.	Quality Control Requests	
☐	Monthly	Lead sources	Compare every lead source against the register. Pause any that stopped delivering.	Lead Source Settings: Active	
☐	Monthly	Templates	Read every first text, email and voicemail for expired offers, old names and wrong hours.	Automated Templates	

	Cadence	Area	Job	Where in LeadLocate	Notes
☐	Monthly	Follow-up	Check each drip ends with a clear next step or a Lost Reason.	Follow Up Processes	
☐	Monthly	Reporting	Review lost reasons and statuses by source and by salesperson.	Reports on the dock	
☐	Monthly	Data	Read the validation dots on new leads by source.	Phone Validator, Email Validator	
☐	Monthly	Compliance	Import any opt out list kept outside the CRM.	DNC Blacklist	
☐	Monthly	Data	Review the Trash Bin and restore anything deleted by mistake.	Trash Bin	
☐	Monthly	Managers	Confirm manager copies on each source and the Default Manager Copies.	Lead Source Settings	
☐	Quarterly	Users	Review every user's access across the CRM, Inventory Link, SecureWebX and the account portal.	User Management, User Access	
☐	Quarterly	Users	Check the role, Quick Access PIN and notifications on every user record.	User Management: Edit User	
☐	Quarterly	Statuses	Review the lost reason list, custom statuses and tags. Write a one line definition for each.	Lost reason list, custom statuses	
☐	Quarterly	Lead sources	Test every lead source end to end with a lead you send yourself.	Lead Source Settings: Activity Log	
☐	Quarterly	Phones	Check the Forward Calls To ring list, greetings, business hours and the virtual receptionist.	Phone settings	
☐	Quarterly	Phones	Review the Alert Keywords list.	Alert Settings	
☐	Quarterly	Email	Confirm email domain authentication, and again after any domain or email change.	Email settings	
☐	Quarterly	Calendar	Check booking links, booking hours and team availability on each calendar.	Calendar Settings	
☐	Quarterly	Training	Book training for new hires and refresh anyone struggling.	Schedule Training, Live Training, video library	

NAMING RULES

Rule	Example	Notes
☐ Start with one channel word: Website, Marketplace, OEM, Phone, Chat, Social, Event, Referral, Walk In.	Marketplace	
☐ Then the provider or form, in the provider's own spelling.	Marketplace Cars.com	
☐ Add a detail only when it changes how you judge the source.	Marketplace Cars.com Used	
☐ No people and no dates in a name.	Website Trade Form	
☐ Thirty characters or fewer.	Phone Radio Spot	
☐ One source, one name, for good. Pause a source instead of renaming it.	Untick Active	
☐ Tracking numbers carry the same name as the source.	Phone Radio Spot	
☐ Leads LeadLocate delivers keep LeadLocate as the source.	LeadLocate	

LEAD SOURCE REGISTER

	Feed Label	Channel	Provider contact	Intake address or number	Lead Assignment	Manager copies	Active	Owner
☐	Website Main Form	Website			Round Robin		Yes	
☐	Website Trade Form	Website						
☐	Marketplace (provider)	Marketplace						
☐	Phone (campaign)	Phone						
☐	Chat (provider)	Chat						
☐	Event (name)	Event						
☐	Referral	Referral						
☐								
☐								

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