FEATURE DETAIL SHEET

Shiftix Cloud and DealerCRM, feature by feature

88 capabilities across 18 categories, showing what each product offers. A companion to the two-page summary.

CAPABILITY	SHIFTIX CLOUD	DEALERCRM
PRICING & TERMS		
How to get pricing	✓ Plans listed; contact Sales for a quote	– No — every deal is a custom proposal
Contract terms	✓ 5 and 10 User Packs are month to month; ask Sales about Enterprise terms	– Signed agreement; term set at signing
Paid add-ons	✓ None for phone, texting or AI; Shiftix Service is optional	✓ Enhanced Video, Partner API, App One connection
ONBOARDING		
Time to go live	✓ Go-live date set together once your data and integrations are confirmed	◉ ~45–60 days from signing; booked weeks out
TRAINING		
When training starts	✓ From the start of onboarding, on your own data, before go-live	◉ After a ~45–60 day wait, then a 4-day go-live week
Practice environment	✓ Sandbox copy of the dealer's own migrated leads	◉ Generic walkthroughs and click-through practice
What's taught	✓ Built around the dealer's own Revenue Leak Audit findings	✓ How to use each screen
Role-based tracks + certification	✓ Sales rep, BDC, manager and service advisor tracks, each ending in a certification	– Not described
In-app manual and lessons	✓ Shiftix Academy: lessons for every feature, Aria answers how-to questions in the app	✓ 90-lesson in-app manual with AI video and practice runs
In-the-moment coaching	✓ Aria coaches inside the workflow; Signal turns real call mistakes into micro-lessons	◉ AI help and Call Goals during calls
New-hire onboarding	✓ Adding a user starts their track automatically; manager sees progress	◉ Self-serve manual
Proof training worked	✓ Day 30/60/90 review: response time, follow-up rate, BlindSpot dollars before vs after	– Not published
Training languages	✓ English + Spanish	◉ English

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✓ Yes ◉ Partial – No, or not listed publicly

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TRAINING (CONT.)		
Cost	✓ Included; remote, no travel	◉ Included; on-site travel billed as pass-through
SUPPORT		
First line of support	✓ Aria support in the app: knows the dealer's setup, fixes settings with approval, one tap to a person	✓ Chat with a person
Hours	✓ Phone + chat during dealer hours, including Saturdays; urgent issues 24/7	◉ Chat anytime, phone in business hours, 24/7 if down
Proactive issue detection	✓ Shiftix alerts the dealer first: silent lead source, broken DMS or inventory feed, failing texts	◉ Status page with 1-minute checks
Named account owner	✓ One named Revenue Advisor with a monthly BlindSpot review: dollars recovered, top leaks, plan	✓ Dedicated support rep + Performance Manager benchmarking
Transparency	✓ Status per integration, public changelog, dealer roadmap voting	◉ Status page and incident log
Accountability	✓ Month-to-month user packs	– Signed agreement
AI		
AI assistant	✓ Aria AI assistant: drafts, summaries, next steps, Q&A on your CRM	✓ OliviaAI across every channel and screen
Autonomy control	✓ Aria Drive per rep: Park / Assist / Drive / Cruise (Drive/Cruise Pro+)	✓ 3 modes per rep/lead: draft, send-after-delay, fully autonomous
Instant lead reply	✓ Automatic, by text and email (Professional+)	✓ Yes, all channels including voice
AI voice — answers calls	✓ Aria answers the store's and each rep's numbers, immediately or after a set number of rings, with after-hours handling and transfers to your team. Calls are recorded and transcribed, with a summary and next steps on the record	✓ OliviaAI answers every missed/after-hours call; books from live calendar
AI voice — outbound calls	✓ Aria outbound caller engages the customer and offers live transfers to the team	✓ OliviaAI dials, converses, books and transfers
AI lead scoring	✓ 0–100 lead score (Professional+)	✓ Prioritized My Day + lifecycle triggers

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AI (CONT.)		
Languages	✓ We can work with your team to add your preferred interface language. Contact us to confirm coverage, timing, and pricing.	✓ 44 languages out of the box across voice, text and email, with English side-by-side
Reads photos/videos customers send	✓ Aria Vision: Aria reads customer photos and videos — trade-in condition, odometer miles, VIN, window stickers and stock numbers fill into the record; videos are transcribed and summarized	✓ Yes — trade photos, stickers, VINs, damage
Plain-English dashboards	✓ Plain-English dashboards with roll-up metrics, and Ask Aria answers questions about your data	✓ Dashboard Studio + ask-the-database
Human approval by default	✓ Built in on every plan (rep sends)	✓ Configurable
PHONE & MESSAGING		
Business phone system	✓ Numbers, routing, click-to-call, recording, transcription (Professional+)	✓ Full native phone on desktop + mobile; replaces Podium/Grasshopper
Outbound calls come from your dealership's own local numbers, with your dealership name registered for caller ID.	✓ Outbound calls come from your dealership's own local numbers, with your dealership name registered for caller ID.	✓ DealerIdentify on every outbound call
Two-way SMS / MMS	✓ Yes (Professional+)	✓ Yes
Outbound calls come from your dealership's own local numbers, with your dealership name registered for caller ID.	✓ Outbound calls come from your dealership's own local numbers, with your dealership name registered for caller ID.	✓ Branded RCS: dealer name, logo, verified badge, vehicle cards, appointment passes
Facebook leads + Messenger	✓ Facebook Lead Ads / Instant Form leads sync in automatically, and Messenger inbox messages are managed and replied to in the app	◉ Messenger messages in the inbox; no Facebook Lead Ads / Instant Form sync described
Instagram + WhatsApp DMs	✓ Instagram and WhatsApp DMs integrated, managed and replied to in the app	✓ Yes, in the same thread
Unified social inbox (comments, DMs, reviews)	✓ Comments, direct messages and reviews from every connected social platform in one inbox, read and replied to in the app	✓ DMs from Messenger, Instagram and WhatsApp plus review replies; social post comments not described
Website live chat	✓ Yes (Professional+)	✓ AI chat on eBrochures + dealer site
Conversation intelligence / coaching	✓ Signal Call Intel: call summaries, objections, win/loss, rep coaching	✓ Live operator co-pilot, risk red-flags, call quality

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PHONE & MESSAGING (CONT.)		
Coaching tips after each call	✓ Coaching tips after calls, from Signal call analysis	– Not described (coaching analytics and live co-pilot)
TCPA / opt-out handling	✓ STOP keywords, auto first-message disclosure	✓ AI opt-out intent detection, consent audit trail, quiet hours
EMAIL		
Basic CRM email	✓ Every plan	✓ Yes
Rep mailbox sync	✓ Mailbox sync for Office 365 and Gmail	✓ Mailbox Sync (M365/Google), sends from real Sent folder
Bulk / campaign email	✓ Aria Campaigns (Mailchimp + Constant Contact): CRM-built smart audiences, plain-English campaigns drafted by Aria, event-triggered emails, opens and clicks on the record, revenue per campaign — sent from the dealer's own account	✓ Plain-English AI campaign builder inside DealerCRM only
CRM		
Core CRM (leads, pipeline, tasks, calendar)	✓ Yes, every plan	✓ Yes
Google Calendar sync	✓ Listed	– No — own calendar only
AI next steps + summaries on the record	✓ Aria 'next steps' on every lead, updated from each touch, plus conversation and call summaries	✓ 5–6 sentence relationship summary regenerated after every touch
License scan	✓ Yes (OCR)	✓ Yes
Floor log / up system	✓ Floor log and up system	✓ The Tower: self-writing floor log, up rotation
Team leaderboard	✓ Yes, every paid plan	✓ Yes + gamification rings/badges
Document repository	✓ Document repository for customer, deal and dealership files	✓ Confidential documents vault for licenses, pay stubs and credit apps; PDF form templates
Google Drive + OneDrive files	✓ Upload, list, download and share files from the dealer's Google Drive and OneDrive inside Shiftix, kept in sync when files change	– Not described

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DESKING & DEALS		
Deal quoting	✓ Deal quoting with state and county taxes, fees, trades, finance payments and printable quotes	✓ AutoPencil 2: 50-state tax, finance/lease/balloon
Digital quotes + deposits	✓ Customers accept quotes online, then go to the dealer's payment link for a deposit	✓ DealRoom remote desking at certified, data-ready stores; deposits stay person-led
Credit pulls (700Credit)	✓ 700Credit integration for customer credit pulls	✓ Embedded credit pulls
Lender programs + e-sign	– No	✓ 212+ lender programs with rates and residuals, in-house e-signature
Multi-unit deals	✓ Multi-unit deals (boat + motor + trailer) and multiple stock numbers on a single quote	✓ Multi-collateral deals on one payment (e.g. two machines + a trailer)
Payments	✓ Invoicing + card processing, deposits, text-to-pay	✓ Managed payment processors
INVENTORY		
Inventory feeds	✓ DMS / FTP / Dealer Spike, Interact RV, BoatWizard, vAuto...	✓ Website feed + DMS pulls
Own vehicle catalog / VIN decode	– No	✓ Own catalogs, VIN decode, window stickers
Market pricing / comps	◉ Price-change tracking per VIN	✓ 5.9M-listing market tracker, reprice recommendations
Price-drop alerts to shoppers	✓ Yes	✓ Yes (lifecycle marketing)
Customer interest matching	✓ Yes	✓ Wishlist matching on every new arrival
MARKETING		
Paid ad performance (Google + Meta)	✓ Google Ads and Meta ads spend, impressions, clicks and cost per lead, tied to the real leads they produced in the CRM	✓ Ad-source attribution for calls and leads; no ad spend, impressions or clicks described

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MARKETING (CONT.)		
Review requests	✓ Review Builder triggers automatically on closed ROs and sold vehicles: thumbs up goes to review sites, thumbs down to a feedback form, every response lands in the CRM. Google reviews sync in and can be answered from Shiftix, and negative feedback triggers follow-up. Review-site and competitor monitoring depends on the sites you connect	✓ Post-purchase survey sends happy customers to Google/Facebook and flags unhappy ones; AI replies to reviews
Partner referral QR codes	✓ Partner QR codes and posters, a public referral form and a partner portal with its own login; referrals credited on the lead; reward rules (flat or % of sale, paid at lead, appointment or sold, with caps) and an approve-and-pay ledger with CSV export; pending rewards void if the deal falls through	– Not described
Social media analytics	✓ Likes, comments, shares, views, reach and followers across Facebook, Instagram and YouTube in one dashboard, with best-post and engagement-rate reporting	– Not offered (social DMs only)
Auto-post inventory to social	✓ New arrivals and price drops post automatically to Facebook, Instagram and other connected platforms, with Aria-written captions	– Not offered
Website conversion score	✓ Results from our 28-check website lead-conversion audit are loaded into Shiftix, and the gaps feed BlindSpot	– Not offered (tells dealers to keep their SEO partner)
Loyalty program	– No	✓ Tiered loyalty tied to ROs
Video	✓ Personalized video messages	✓ Walkarounds, live video chat, AI-made walkarounds (add-on)
SERVICE		
Service department tools	✓ Shiftix Service add-on: scheduling, check-in, DVI, approvals, text-to-pay	◉ Service history display + cross-sell flags only
REPORTING		
Revenue-leak monitoring	✓ BlindSpot (Professional+) + free Revenue Leak Audit	– Not offered

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REPORTING (CONT.)		
Response-time & rep reporting	✓ Yes	✓ Second-level response leaderboards, wall monitors
MOBILE		
Mobile	✓ Mobile-friendly view on any phone, with push alerts	✓ Native iOS, Android, tablets, watch
INTEGRATIONS		
DMS	✓ 26 DMS targets listed; any DMS that provides connections	✓ CDK two-way; Reynolds pull-only; others partial or restricted
Accounting	✓ QuickBooks, Xero	✓ QuickBooks
Automation tools	✓ Zapier, Make, Pipedream, Slack	– Not listed
Open API	✓ REST, OAuth, webhooks, API keys	✓ Partner API (paid add-on) + read-only MCP server
SECURITY		
Encryption, audit logs, tenant isolation	✓ Yes	✓ Yes (95+ permissions)
SOC 2	◉ SOC 2 readiness in progress; no report issued yet	– Declines to claim any certification
SSO	◉ Enterprise SSO (Entra ID), scoped during setup	◉ Listed, no detail
VERTICALS		
Industries	✓ Auto, RV, marine, powersports + Shiftix B2B	✓ Auto, RV, marine, powersports, golf carts live; 12 marketed
OTHER CAPABILITIES		
Duplicate merge	✓ Merge duplicate leads and keep their full history	✓ Cautious duplicate matching on import
Delivery scheduling	✓ Delivery calendar and post-sale handoff	– Not described
Service estimate approvals	✓ Customers approve service estimates line by line, with inspection photos and video	– Not offered

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OTHER CAPABILITIES (CONT.)		
Owner recaps	✓ BlindSpot fix tracking and monthly owner recaps from your Revenue Advisor	– Not offered
B2B proposals	✓ Proposals and packages for business-to-business sales	– Not offered

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