FEATURE DETAIL SHEET

Shiftix Cloud and DealerDock, feature by feature

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

CAPABILITY	SHIFTIX CLOUD	DEALERDOCK
PRICING & TERMS		
How to get pricing	✓ Plans listed; contact Sales for a quote	– Bundled in a marketing retainer
Contract terms	✓ 5 and 10 User Packs are month to month; ask Sales about Enterprise terms	– Requires a Blackbear Marketing retainer
Paid add-ons	✓ None for phone, texting or AI; Shiftix Service is optional	✓ No per-seat fees or add-ons for the basics
ONBOARDING		
Time to go live	✓ Go-live date set together once your data and integrations are confirmed	– Not listed
TRAINING		
When training starts	✓ From the start of onboarding, on your own data, before go-live	✓ Team trained during setup
Practice environment	✓ Sandbox copy of the dealer's own migrated leads	– Not listed
What's taught	✓ Built around the dealer's own Revenue Leak Audit findings	✓ Step-by-step guides for every screen
Role-based tracks + certification	✓ Sales rep, BDC, manager and service advisor tracks, each ending in a certification	– Not listed
In-app manual and lessons	✓ Shiftix Academy: lessons for every feature, Aria answers how-to questions in the app	◉ Help center with a guide for every screen
In-the-moment coaching	✓ Aria coaches inside the workflow; Signal turns real call mistakes into micro-lessons	– Not listed
New-hire onboarding	✓ Adding a user starts their track automatically; manager sees progress	– Not listed
Proof training worked	✓ Day 30/60/90 review: response time, follow-up rate, BlindSpot dollars before vs after	– Not listed
Training languages	✓ English + Spanish	– Not listed

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CAPABILITY	SHIFTIX CLOUD	DEALERDOCK
TRAINING (CONT.)		
Cost	✓ Included; remote, no travel	✓ In the retainer
SUPPORT		
First line of support	✓ Aria support in the app: knows the dealer's setup, fixes settings with approval, one tap to a person	✓ Support from the people who build it
Hours	✓ Phone + chat during dealer hours, including Saturdays; urgent issues 24/7	– Not listed
Proactive issue detection	✓ Shiftix alerts the dealer first: silent lead source, broken DMS or inventory feed, failing texts	– Not listed
Named account owner	✓ One named Revenue Advisor with a monthly BlindSpot review: dollars recovered, top leaks, plan	– Not listed
Transparency	✓ Status per integration, public changelog, dealer roadmap voting	– Not listed
Accountability	✓ Month-to-month user packs	– Tied to the marketing retainer
AI		
AI assistant	✓ Aria AI assistant: drafts, summaries, next steps, Q&A on your CRM	✓ Scout assistant, AI daily focus list
Autonomy control	✓ Aria Drive per rep: Park / Assist / Drive / Cruise (Drive/Cruise Pro+)	◉ Team approves what gets sent
Instant lead reply	✓ Automatic, by text and email (Professional+)	◉ AI replies to website chat
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	– Not listed; AI answers website chat
AI voice — outbound calls	✓ Aria outbound caller engages the customer and offers live transfers to the team	– Not listed
AI lead scoring	✓ 0–100 lead score (Professional+)	✓ Lead score and hot, warm, cold labels

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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.	– Not listed
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	– Not listed
Plain-English dashboards	✓ Plain-English dashboards with roll-up metrics, and Ask Aria answers questions about your data	✓ Scout answers questions about your numbers
Human approval by default	✓ Built in on every plan (rep sends)	✓ Team stays in charge of what gets sent
PHONE & MESSAGING		
Business phone system	✓ Numbers, routing, click-to-call, recording, transcription (Professional+)	◉ Logs calls from Quo or 3CX
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.	– Not listed
Two-way SMS / MMS	✓ Yes (Professional+)	✓ Two-way texting from your number
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.	◉ Texts from your dealership number
Facebook leads + Messenger	✓ Facebook Lead Ads / Instant Form leads sync in automatically, and Messenger inbox messages are managed and replied to in the app	✓ Facebook and Instagram lead ads
Instagram + WhatsApp DMs	✓ Instagram and WhatsApp DMs integrated, managed and replied to in the app	◉ Instagram lead ads; DMs not described
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	– Not listed
Website live chat	✓ Yes (Professional+)	✓ Website chat with AI, sales and service
Conversation intelligence / coaching	✓ Signal Call Intel: call summaries, objections, win/loss, rep coaching	– Not listed

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CAPABILITY	SHIFTIX CLOUD	DEALERDOCK
PHONE & MESSAGING (CONT.)		
Coaching tips after each call	✓ Coaching tips after calls, from Signal call analysis	– Not listed
TCPA / opt-out handling	✓ STOP keywords, auto first-message disclosure	◉ Unsubscribes and bounces handled
EMAIL		
Basic CRM email	✓ Every plan	✓ Email from your own domain
Rep mailbox sync	✓ Mailbox sync for Office 365 and Gmail	✓ Gmail and Outlook
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	✓ Email and text blasts, automations
CRM		
Core CRM (leads, pipeline, tasks, calendar)	✓ Yes, every plan	✓ Yes
Google Calendar sync	✓ Listed	✓ Google and Outlook calendar sync
AI next steps + summaries on the record	✓ Aria 'next steps' on every lead, updated from each touch, plus conversation and call summaries	✓ AI daily focus list for each rep
License scan	✓ Yes (OCR)	– Not listed
Floor log / up system	✓ Floor log and up system	◉ Round-robin assignment by department
Team leaderboard	✓ Yes, every paid plan	◉ Team views
Document repository	✓ Document repository for customer, deal and dealership files	✓ Files and notes on customers and deals
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 listed
DESKING & DEALS		

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DESKING & DEALS (CONT.)		
Deal quoting	✓ Deal quoting with state and county taxes, fees, trades, finance payments and printable quotes	✓ Quotes with fees, trade-in and financing
Digital quotes + deposits	✓ Customers accept quotes online, then go to the dealer's payment link for a deposit	◉ Quote becomes a sales contract
Credit pulls (700Credit)	✓ 700Credit integration for customer credit pulls	– Not listed
Lender programs + e-sign	– No	– Not listed
Multi-unit deals	✓ Multi-unit deals (boat + motor + trailer) and multiple stock numbers on a single quote	◉ Boat, motor, trailer units; multi-unit quotes not described
Payments	✓ Invoicing + card processing, deposits, text-to-pay	– Not listed
INVENTORY		
Inventory feeds	✓ DMS / FTP / Dealer Spike, Interact RV, BoatWizard, vAuto...	✓ DealerSpike and BoatWizard imports
Own vehicle catalog / VIN decode	– No	◉ Build-a-Boat configurator
Market pricing / comps	◉ Price-change tracking per VIN	– Not listed
Price-drop alerts to shoppers	✓ Yes	– Not listed
Customer interest matching	✓ Yes	✓ Tracks units each shopper viewed
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 cost per lead in monthly report

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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	✓ Google review requests by text or email
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	◉ Lot-sign QR codes with scan counts
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	◉ Content calendar; Blackbear manages posts
Auto-post inventory to social	✓ New arrivals and price drops post automatically to Facebook, Instagram and other connected platforms, with Aria-written captions	– Not listed
Website conversion score	✓ Results from our 28-check website lead-conversion audit are loaded into Shiftix, and the gaps feed BlindSpot	◉ Website and Google Business metrics
Loyalty program	– No	– Not listed
Video	✓ Personalized video messages	– Not listed
SERVICE		
Service department tools	✓ Shiftix Service add-on: scheduling, check-in, DVI, approvals, text-to-pay	◉ Service chat and appointment types
REPORTING		
Revenue-leak monitoring	✓ BlindSpot (Professional+) + free Revenue Leak Audit	◉ Report flags where follow-up slipped

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REPORTING (CONT.)		
Response-time & rep reporting	✓ Yes	✓ Dashboards and team views
MOBILE		
Mobile	✓ Mobile-friendly view on any phone, with push alerts	◉ iPhone app
INTEGRATIONS		
DMS	✓ 26 DMS targets listed; any DMS that provides connections	✓ Lightspeed
Accounting	✓ QuickBooks, Xero	– Not listed
Automation tools	✓ Zapier, Make, Pipedream, Slack	◉ HubSpot, Gravity Forms, WordPress
Open API	✓ REST, OAuth, webhooks, API keys	– Not listed
SECURITY		
Encryption, audit logs, tenant isolation	✓ Yes	– Not listed
SOC 2	◉ SOC 2 readiness in progress; no report issued yet	– Not listed
SSO	◉ Enterprise SSO (Entra ID), scoped during setup	– Not listed
VERTICALS		
Industries	✓ Auto, RV, marine, powersports + Shiftix B2B	✓ Marine first, plus powersports
OTHER CAPABILITIES		
Duplicate merge	✓ Merge duplicate leads and keep their full history	– Not listed
Delivery scheduling	✓ Delivery calendar and post-sale handoff	✓ Delivery appointments and reminders
Service estimate approvals	✓ Customers approve service estimates line by line, with inspection photos and video	– Not listed
Owner recaps	✓ BlindSpot fix tracking and monthly owner recaps from your Revenue Advisor	✓ Plain-English Performance Report

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OTHER CAPABILITIES (CONT.)		
B2B proposals	✓ Proposals and packages for business-to-business sales	– Not listed

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