FEATURE DETAIL SHEET

Shiftix Cloud and PSX Ascend, feature by feature

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

CAPABILITY	SHIFTIX CLOUD	PSX ASCEND
PRICING & TERMS		
How to get pricing	✓ Plans listed; contact Sales for a quote	– Not published
Contract terms	✓ 5 and 10 User Packs are month to month; ask Sales about Enterprise terms	– Not published
Paid add-ons	✓ None for phone, texting or AI; Shiftix Service is optional	– Not listed
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	– Not listed
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	– Not listed
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	– Not listed
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

PSX Ascend details are based on public information on psxascend.ai as of Nov 5, 2026. "Not listed" means we could not find it published. Features in both products change often, so please confirm details.

✓ Yes ◉ Partial – No, or not listed publicly

CAPABILITY	SHIFTIX CLOUD	PSX ASCEND
TRAINING (CONT.)		
Cost	✓ Included; remote, no travel	– Not listed
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 requests by category, plus phone
Hours	✓ Phone + chat during dealer hours, including Saturdays; urgent issues 24/7	◉ Business hours; 4-hour response target
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	– Not published
AI		
AI assistant	✓ Aria AI assistant: drafts, summaries, next steps, Q&A on your CRM	✓ ALMA lead assistant
Autonomy control	✓ Aria Drive per rep: Park / Assist / Drive / Cruise (Drive/Cruise Pro+)	◉ Team stays in control; modes not published
Instant lead reply	✓ Automatic, by text and email (Professional+)	✓ ALMA: 24/7 text and email follow-up
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	◉ ALMA call workflows; details not published
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+)	✓ Opportunity score on every customer

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CAPABILITY	SHIFTIX CLOUD	PSX ASCEND
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	– Not listed
Human approval by default	✓ Built in on every plan (rep sends)	✓ Team stays in control
PHONE & MESSAGING		
Business phone system	✓ Numbers, routing, click-to-call, recording, transcription (Professional+)	◉ Virtual numbers listed in support
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+)	✓ Text follow-up
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
Facebook leads + Messenger	✓ Facebook Lead Ads / Instant Form leads sync in automatically, and Messenger inbox messages are managed and replied to in the app	– Not listed
Instagram + WhatsApp DMs	✓ Instagram and WhatsApp DMs integrated, managed and replied to in the app	– Not listed
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+)	– Not listed
Conversation intelligence / coaching	✓ Signal Call Intel: call summaries, objections, win/loss, rep coaching	– Not listed

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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	– Not listed
EMAIL		
Basic CRM email	✓ Every plan	✓ Email follow-up
Rep mailbox sync	✓ Mailbox sync for Office 365 and Gmail	– Not listed
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	✓ AMP marketing automation
CRM		
Core CRM (leads, pipeline, tasks, calendar)	✓ Yes, every plan	✓ Yes
Google Calendar sync	✓ Listed	– Not listed
AI next steps + summaries on the record	✓ Aria 'next steps' on every lead, updated from each touch, plus conversation and call summaries	✓ Next-action visibility
License scan	✓ Yes (OCR)	– Not listed
Floor log / up system	✓ Floor log and up system	– Not listed
Team leaderboard	✓ Yes, every paid plan	◉ Team accountability views
Document repository	✓ Document repository for customer, deal and dealership files	◉ CRM forms and documents
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	– Not listed
Digital quotes + deposits	✓ Customers accept quotes online, then go to the dealer's payment link for a deposit	– Not listed
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	– Not listed
Payments	✓ Invoicing + card processing, deposits, text-to-pay	– Not listed
INVENTORY		
Inventory feeds	✓ DMS / FTP / Dealer Spike, Interact RV, BoatWizard, vAuto...	✓ Capture and channel syndication
Own vehicle catalog / VIN decode	– No	– Not listed
Market pricing / comps	◉ Price-change tracking per VIN	✓ Aging and pricing views
Price-drop alerts to shoppers	✓ Yes	– Not listed
Customer interest matching	✓ Yes	✓ Matches shopper intent to units
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	◉ Marketing services; spend view not published

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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	– Not listed
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 listed
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 listed
Auto-post inventory to social	✓ New arrivals and price drops post automatically to Facebook, Instagram and other connected platforms, with Aria-written captions	◉ Channel syndication
Website conversion score	✓ Results from our 28-check website lead-conversion audit are loaded into Shiftix, and the gaps feed BlindSpot	◉ Website quality standards on its sites
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	– Not listed
REPORTING		
Revenue-leak monitoring	✓ BlindSpot (Professional+) + free Revenue Leak Audit	– Not listed as a tool

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REPORTING (CONT.)		
Response-time & rep reporting	✓ Yes	✓ Response and coverage by rooftop
MOBILE		
Mobile	✓ Mobile-friendly view on any phone, with push alerts	◉ Mobile inventory capture
INTEGRATIONS		
DMS	✓ 26 DMS targets listed; any DMS that provides connections	– Not listed
Accounting	✓ QuickBooks, Xero	– Not listed
Automation tools	✓ Zapier, Make, Pipedream, Slack	– Not listed
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	✓ Powersports, marine and RV
OTHER CAPABILITIES		
Duplicate merge	✓ Merge duplicate leads and keep their full history	✓ Record matching across stores
Delivery scheduling	✓ Delivery calendar and post-sale handoff	– Not listed
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	– Not listed

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

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