Dealer Editing FAQ

1. Dealer Editing
2. Permission
3. Contact Information
4. Business
5. Owner

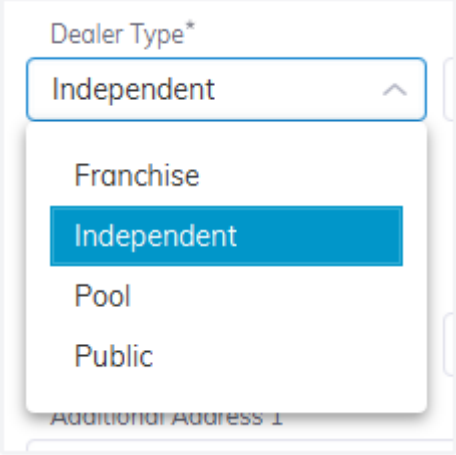
- Dealer Editing
- Permission
- Contact Information
- Business
- Owner

Dealer Editing

Under Dealer Profile you can use the Dealers - Filters icon to filter which dealer types appear in the Dealer Profile application. At the top of the Dealer Profile application, you'll see 3 icons; The one you need is the funnel shape icon for filtering by Dealer Type and Status.

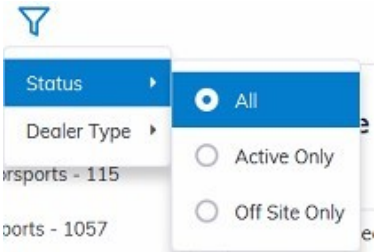
Select the Funnel shape icon > 'Dealer Type' > then select the types you want to see;

- **Public -** Select if you wish to view all Public vehicle dealers
- **Pool -** Select if you want to view all Pool vehicle dealers
- **Franchise -** Select if you want to view all Franchise accounts
- **Independent -**Select if you want to view all Independent Accounts

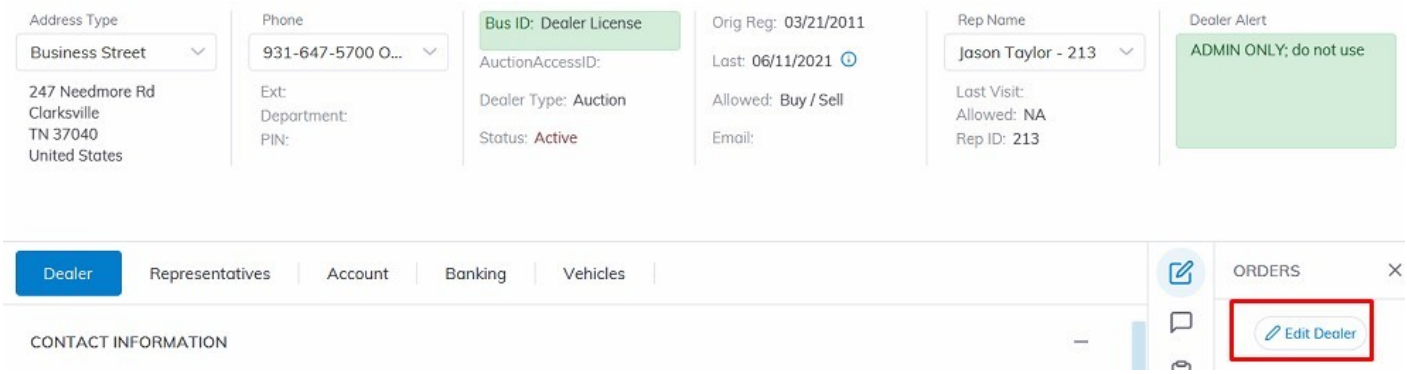


Select the Funnel shape icon > 'Status' > then select the types you want to see;

- **All** - Select if you want to view All Dealers
- **Active Only** - Select if you want to view Active accounts only
- **Off-Site Only** - Select if you want to view Off-Site accounts only.



Edit Dealer button - This allows users to change Dealer Information.



Select

'Edit Dealer'

Click 'Save' when you have completed editing the dealer.

Note: Before issuing the Edit Dealer Order, ensure you have selected the dealer you want to edit and that your login has permission for the Edit Dealer order.

The Edit Dealer form has 4 groups of information to edit; **Contact Information**, **Permission**, **Business,** and **Owner**.

The Summary information:

- **Contact Information:** The Business Address, Phone number, Email Address, and Dealership Logo Image.
- **Permission:** Buyer and Seller Permission where you can add or remove payment methods. e.g. cash, debit, credit, checks, wire, etc.
- **Business:** This section the type of business the dealer is as well as what type of taxes are applied to this business.
- **Owner:** Detail information of the Business Owner and Seller Check deductions
- **Streaming:** section is system generated no change can be made here.

Permission

Payment Methods

Select Payment Type for use in **Seller Settlement**.

Cash, Check, Draft and Wire

Select Payment Type for use in **Buyer Settlement**.

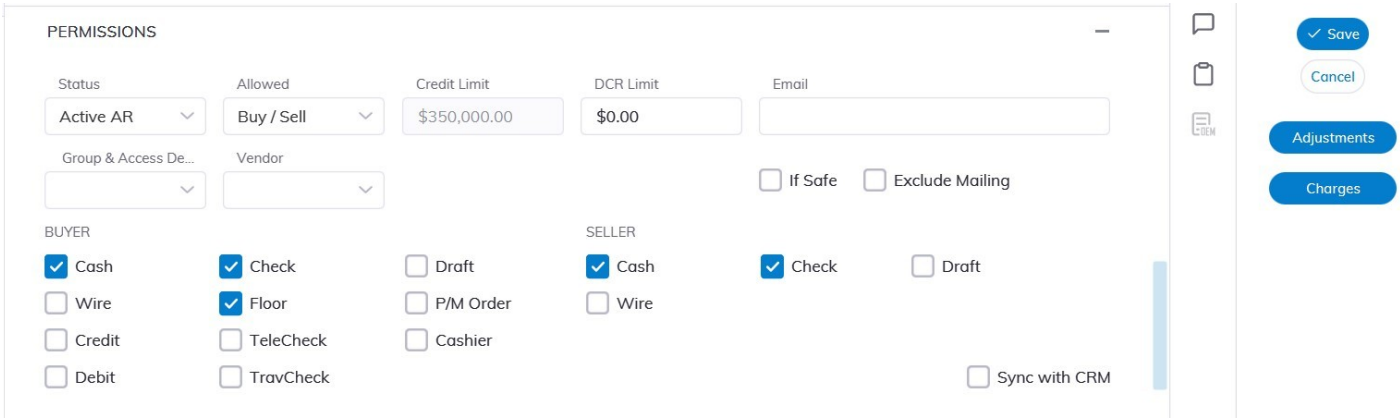
Cash, Check, Credit,

Debit, Wire, P/M Order,

Draft, Floor Plan, TeleCheck,

Travelers Check, Cashier

Click 'Save' to Save.



Permissions

NA - No Buying and No Selling. The Dealer and its Reps will not be able to Register Vehicles for Sale or Check-in as a Buyer for any Sale.

Buy - Buying Only. The Dealer and its Reps may obtain a Bid badge through Rep Check In, although they will not be able to Register Vehicles for Sale.

Sell - Selling Only. The Dealer and its Reps may Register Vehicles for Sale, although they will not be able to Check-in as a Buyer.

Buy / Sell - Buying and Selling. The Dealer and its Reps may Register Vehicles for Sale as well as Check in as a Buyer.

Pre Reg - Pre Registration is used to indicate the Dealer Registration is incomplete and permission for Buying and Selling is not granted.

Marketing - Marketing is used to indicate the Dealer Registration is for Marketing purposes only and permission for Buying and Selling is not granted.

- **Exclude Mailing:** Setting the 'Exclude Mailing' value to true (clicking the check box) will exclude this dealer from being included in the Mailing Label report.

Permissions are set at both the Dealer and Representative levels. The Dealer over-rides the Rep.

Note: Settings of NA or Buy will prevent any Vehicle from being ' Checked In ' to a sale.

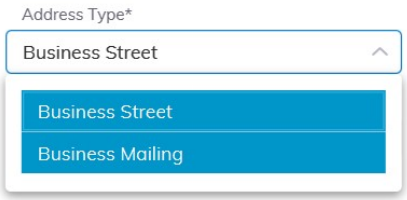
Contact Information

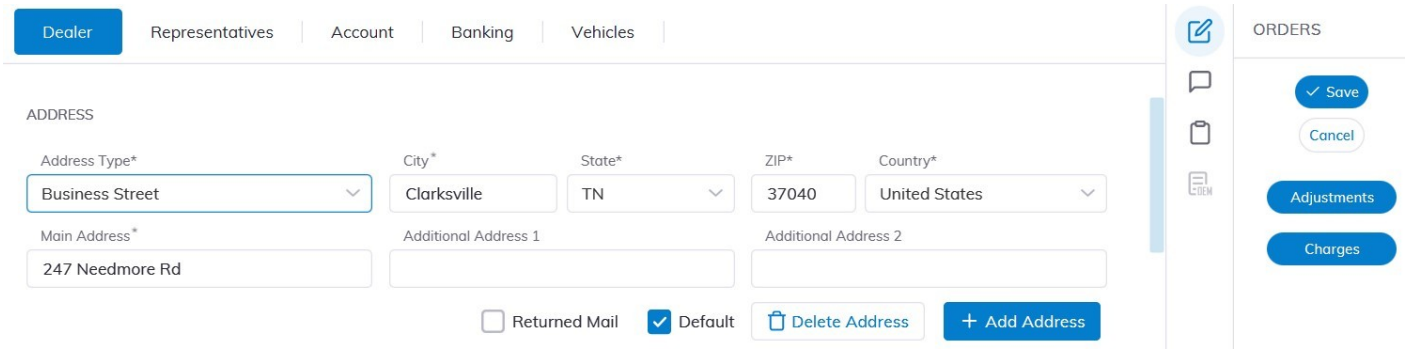
Change Address

Select the Address Type: e.g. Business Mailing, Business Street, Main Office Street, etc.

Change Address Information

Click 'Save' to Save.





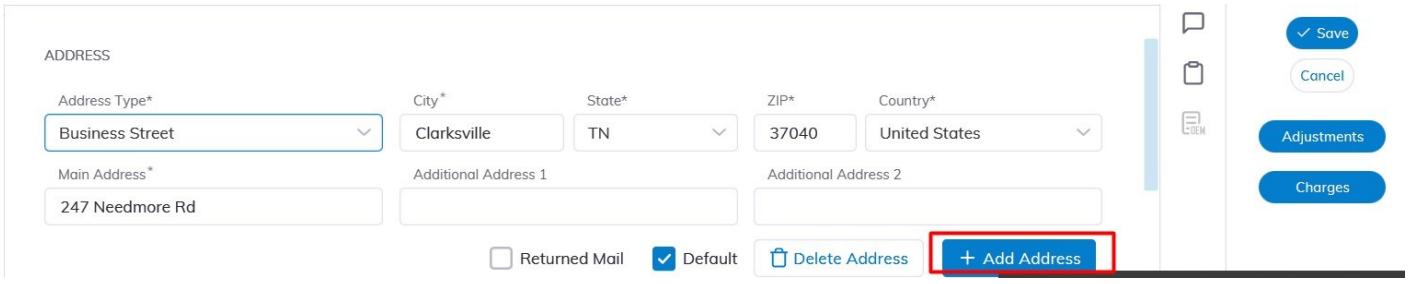
Add New Address

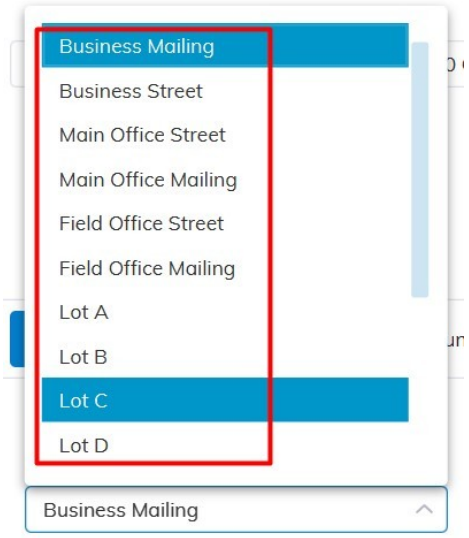
Select the 'Add Address’ button

Choose the Address Type: e.g. Business Mailing, Business Street, Main Office Street etc.

Add Address Information

Click 'Save' to Save.



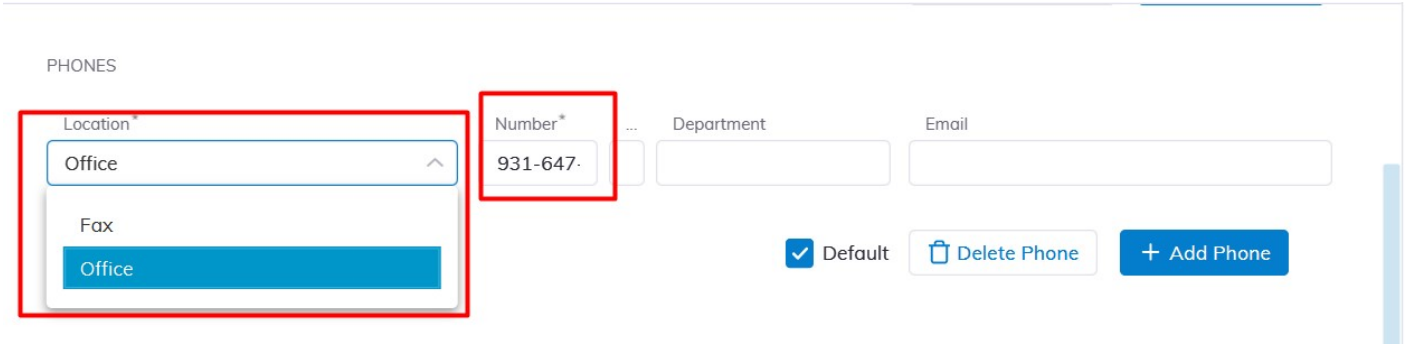


Change Phone Number

Select the Phone location: e.g. Office, Fax, Mobile, etc.;

Change Telephone Information e.g. 931-647-5555

Click 'Save' to Save.



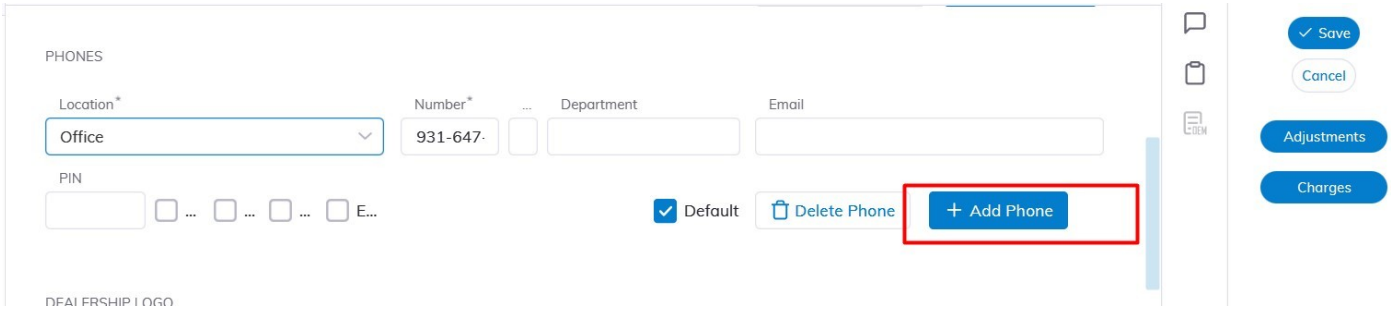
Add New Phone

Select the 'Add Phone' button

Select the Phone location: e.g. Office, Fax, Mobile, etc.;

Add Telephone Information e.g. 931-647-5555

Click 'Save' to Save

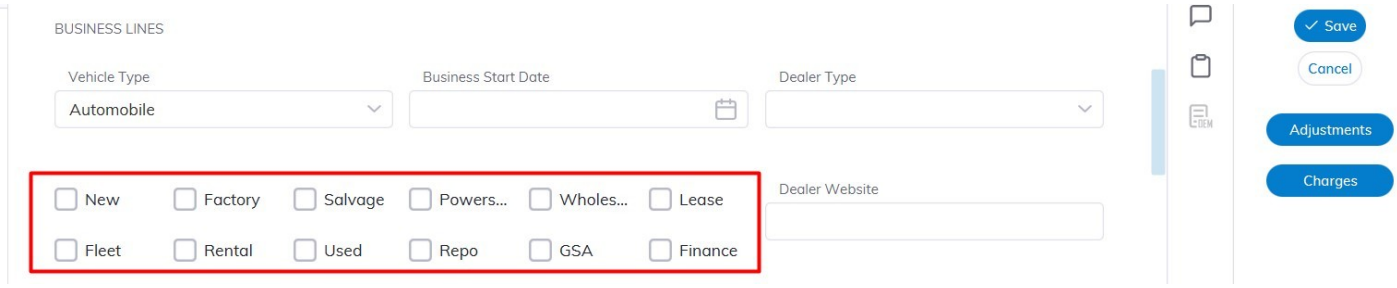

PHONES
Location*
Office
Number*
931-647-
...
Department
Email
PIN
...
...
...
E...
Default
Delete Phone
+ Add Phone
DEALERSHIP LOGO
Save
Cancel
Adjustments
Charges

Business

Under the Business Section of Edit Dealer

Business Lines

Options available for selection: New, Fleet, Factory, Rental, Used, Lease, Salvage, Repo, GSA, Finance, Wholesale, etc.

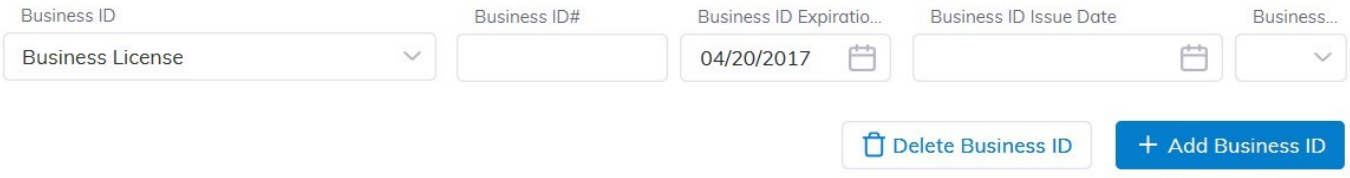


Business Details

Select one of several types:

- **Business License**
- **Dealer License**
- **Sales Tax Certificate**
- **Dealer Master Tag**

Type the Business ID Expiration, Business ID#, and Business ID State.

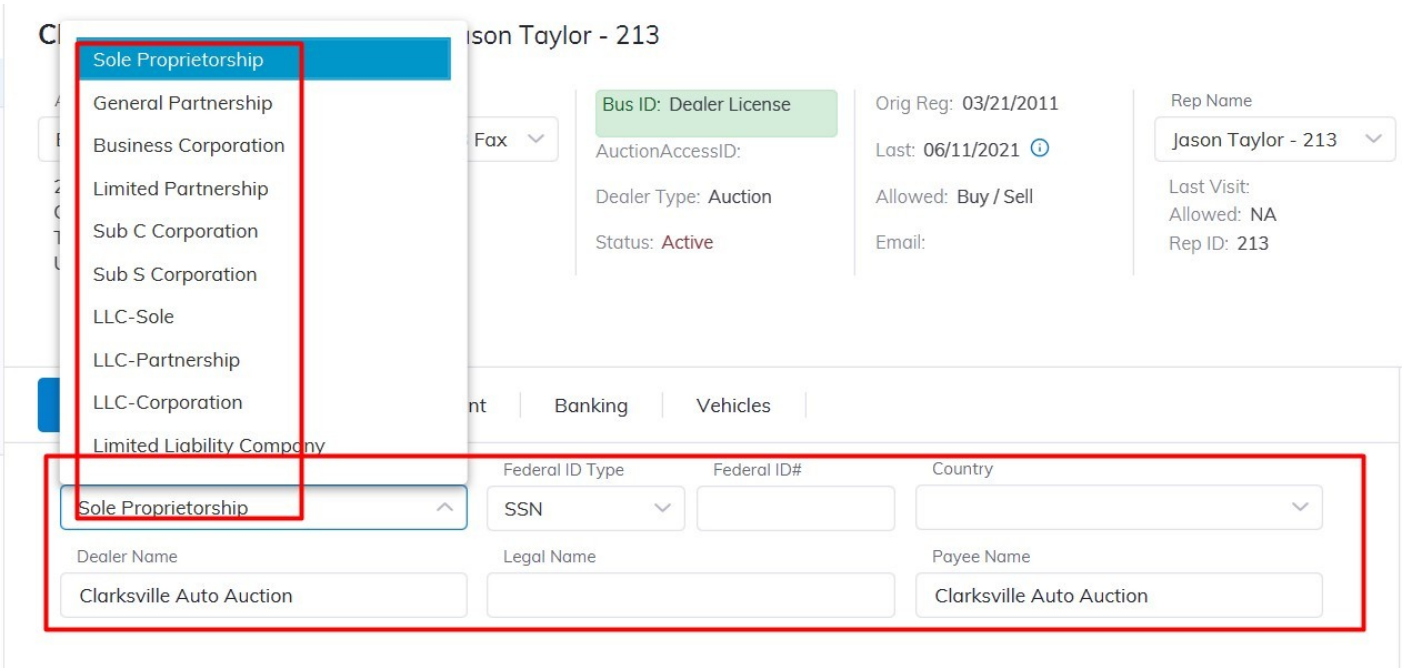


When editing the Business Information, you can select any one of the types of Business structure:

- **Business Corporation**
- **Sole Proprietorship**
- **General Partnership**
- **Limited Partnership**
- **LLC-Sole**
- **LLC-Partnership**

- **LLC-Corporation**

Etc.



Fill in the other fields:

- **Legal Name**
- **Dealer Name**
- **Federal ID Type - SSN or EIN (depending on corporation type)**
- **Federal ID#**
- **Country**
- **Payee Name**

Click 'Save' to Save.

Insurance

Fill in the other fields:

- **Insurance Company**
- **Insurance Policy#**
- **Insurance Policy Expiration Date**
- **Bonding Company Name**
- **Bonding Policy Number**
- **Bonding Policy Expiration Date**
- **Bond Credit Limit**
- **Resale Certificate**
- **Resale Certificate Expiration Date**

INSURANCE

Insurance Company	Insurance Policy#	Insurance Policy Expiration Date
Auto Auction Agency	123-456879	08/31/2023

Bonding Company Name	Bonding Policy Number	Bonding Policy Expiration Date
Auction Bonding Agency	123-9923456768	08/31/2023

Bond Credit Limit	Resale Certificate	Resale Certificate Expiration Date
$20,000,000.00	123-7877799922	08/31/2023

Save
Cancel
Adjustments
Charges

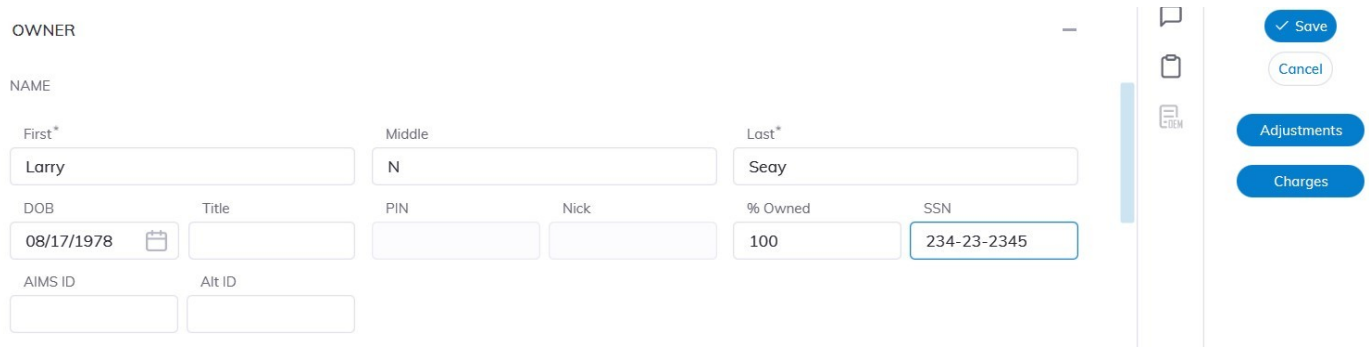
Owner

The owner section is where the Business Owners' info is entered.

Fill in the other fields:

- **First Name**
- **Middle Name**
- **Last Name**
- **Title**
- **SSN**
- **DOB**
- **Percentage Ownership**

Click 'Save' to Save.



The **Seller Check Deductions** reflect the Auction's policy regarding which amounts are deducted from a Seller's check' versus those billed to the Seller's Accounts Receivable. The Dealer specific settings allow an Auction to have a different policy for different Dealers. Settings apply to any and all Seller Check issued to a Dealer.

Any charge, adjustment, or fee associated with a vehicle may be subject to Seller Check Deductions.

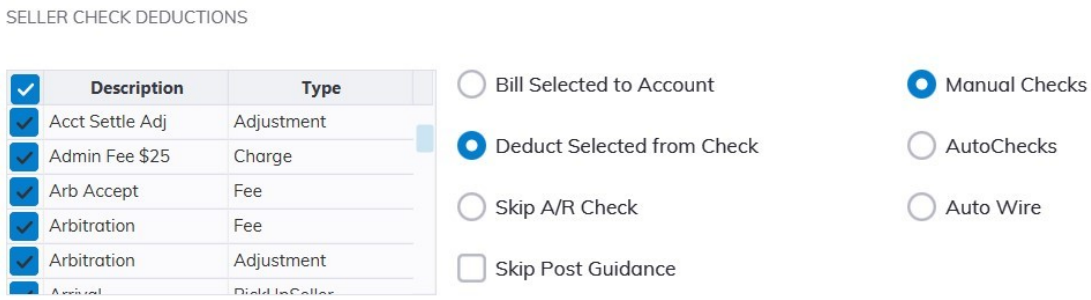
Selecting:

- **'Bill Selected to Account':** means any selected charges, adjustments, or fees are guided to the account during Sell Settle.
- **‘Deduct Selected from Check’:** means any selected charges, adjustments, or fees are guided from the account during Sell Settle.

Automated checks or wires may be set up for the individual dealer.

NOTE: Contact AMS support before setting this control to Automatic

Click 'Save' to Save.



Condition Report

Select the down at the following fields: choose the CRC template to use

- **Automobile**
- **Marine**
- **RV**
- **Powersports**

Click 'Save' to Save.

This setting will determine which Condition Report Configuration (CRC) is used for a Condition Report. Through the use of the CRC; a Condition Report's content may be customized to meet the needs of a particular Dealer.

