

Dealer Editing FAQ

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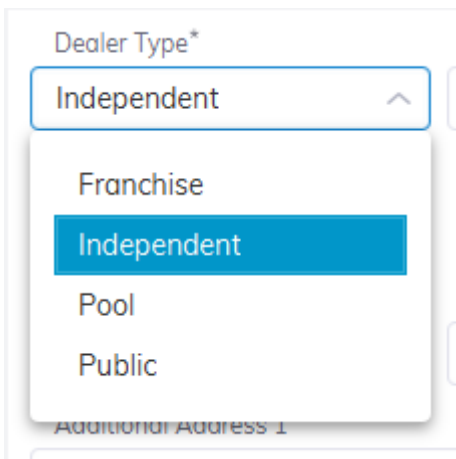
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Dealer Editing

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.

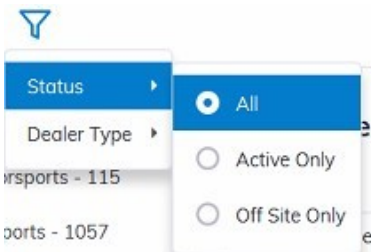
Select the Funnel shape icon > 'Dealer Type' > then select the types you want to see;

- **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.

Address Type Business Street 247 Needmore Rd Clarksville TN 37040 United States	Phone 931-647-5700 O... Ext: Department: PIN:	Bus ID: Dealer License AuctionAccessID: Dealer Type: Auction Status: Active	Orig Reg: 03/21/2011 Last: 06/11/2021 Allowed: Buy / Sell Email:	Rep Name Jason Taylor - 213 Last Visit: Allowed: NA Rep ID: 213	Dealer Alert ADMIN ONLY; do not use
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Dealer
Representatives
Account
Banking
Vehicles

✎
ORDERS
×

CONTACT INFORMATION

Edit Dealer

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

Status	Allowed	Credit Limit	DCR Limit	Email
Active AR	Buy / Sell	\$350,000.00	\$0.00	
Group & Access De...	Vendor			
				<input type="checkbox"/> If Safe <input type="checkbox"/> Exclude Mailing

BUYER

<input checked="" type="checkbox"/> Cash	<input checked="" type="checkbox"/> Check	<input type="checkbox"/> Draft
<input type="checkbox"/> Wire	<input checked="" type="checkbox"/> Floor	<input type="checkbox"/> P/M Order
<input type="checkbox"/> Credit	<input type="checkbox"/> TeleCheck	<input type="checkbox"/> Cashier
<input type="checkbox"/> Debit	<input type="checkbox"/> TravCheck	

SELLER

<input checked="" type="checkbox"/> Cash	<input checked="" type="checkbox"/> Check	<input type="checkbox"/> Draft
<input type="checkbox"/> Wire		
		<input type="checkbox"/> Sync with CRM

Save Cancel Adjustments Charges

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.

Address Type*

Business Street ^

Business Street

Business Mailing

Dealer | Representatives | Account | Banking | Vehicles

ADDRESS

Address Type* Business Street

City* Clarksville State* TN ZIP* 37040 Country* United States

Main Address* 247 Needmore Rd

Additional Address 1

Additional Address 2

Returned Mail Default

ORDERS

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.

ADDRESS

Address Type* Business Street

City* Clarksville State* TN ZIP* 37040 Country* United States

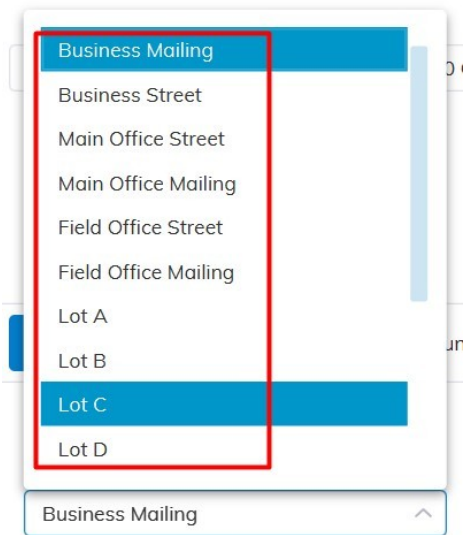
Main Address* 247 Needmore Rd

Additional Address 1

Additional Address 2

Returned Mail Default

ORDERS



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.

PHONES

Location*	Number*	...	Department	Email
Office	931-647-			
Fax				
Office				

Default

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* Number* ... Department Email

PIN E...

Default



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 LINES

Vehicle Type: Automobile

Business Start Date: [Calendar Icon]

Dealer Type: [Dropdown]

Dealer Website: [Text Field]

New Factory Salvage Powers... Wholes... Lease

Fleet Rental Used Repo GSA Finance

Buttons: Save, Cancel, Adjustments, Charges

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.

Business ID: Business License

Business ID#: [Text Field]

Business ID Expiration: 04/20/2017

Business ID Issue Date: [Calendar Icon]

Business ID State: [Dropdown]

Buttons: Delete Business ID, Add Business ID

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.

Jason Taylor - 213

Bus ID: Dealer License

Orig Reg: 03/21/2011

Rep Name: Jason Taylor - 213

Last: 06/11/2021

Dealer Type: Auction

Allowed: Buy / Sell

Status: Active

Email:

Last Visit: Allowed: NA

Rep ID: 213

nt | Banking | Vehicles

Federal ID Type: SSN | Federal ID# | Country

Dealer Name: Clarksville Auto Auction | Legal Name | Payee Name: Clarksville Auto Auction

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.

OWNER

NAME

First*	Middle	Last*			
Larry	N	Seay			
DOB	Title	PIN	Nick	% Owned	SSN
08/17/1978				100	234-23-2345
AIMS ID	Alt ID				

Save
Cancel
Adjustments
Charges

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.

SELLER CHECK DEDUCTIONS

<input checked="" type="checkbox"/>	Description	Type
<input checked="" type="checkbox"/>	Acct Settle Adj	Adjustment
<input checked="" type="checkbox"/>	Admin Fee \$25	Charge
<input checked="" type="checkbox"/>	Arb Accept	Fee
<input checked="" type="checkbox"/>	Arbitration	Fee
<input checked="" type="checkbox"/>	Arbitration	Adjustment
<input checked="" type="checkbox"/>	Arbitration	Adjustment

Bill Selected to Account

Deduct Selected from Check

Skip A/R Check

Skip Post Guidance

Manual Checks

AutoChecks

Auto Wire

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.

CONDITION REPORT TEMPLATES

Automobile	Marine
<input type="text" value="CAMS II"/>	<input type="text" value="CAMS II"/>
RV	Power Sports
<input type="text" value="CAMS II"/>	<input type="text" value="CAMS II"/>
<input type="checkbox"/> Alternate I...	<input type="text"/>