Dealers FAQ

1. Show Details
2. Dealer Order
3. Dealer Activation

- Show Details Button
- Dealer Orders
- Dealer Activation

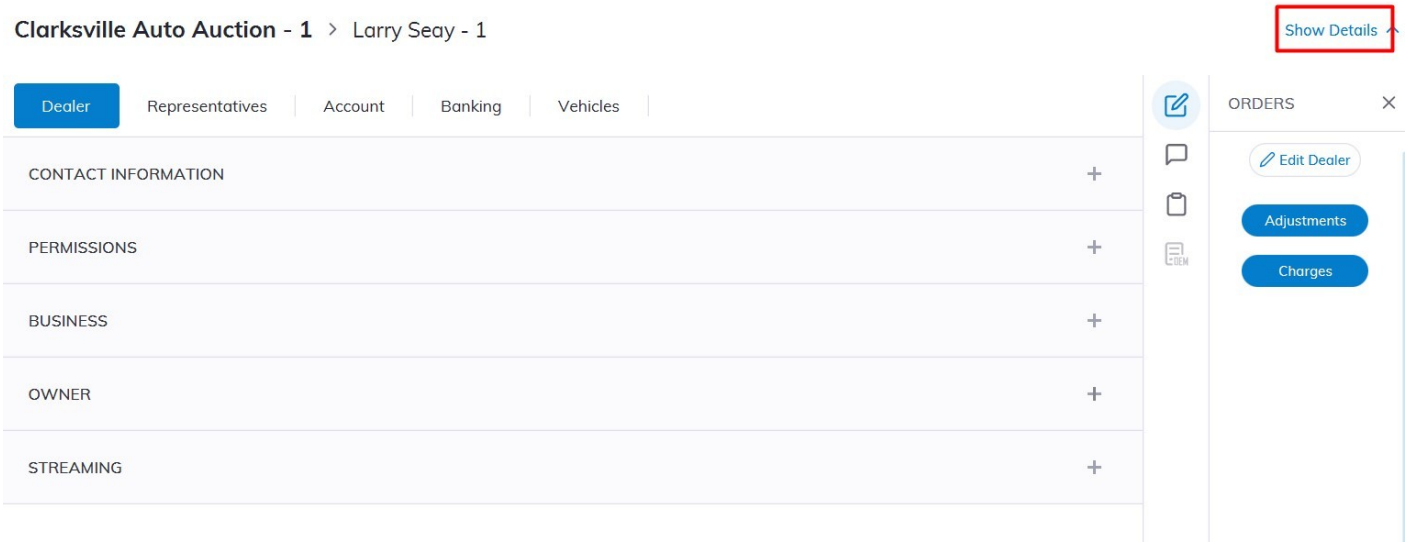
Show Details Button

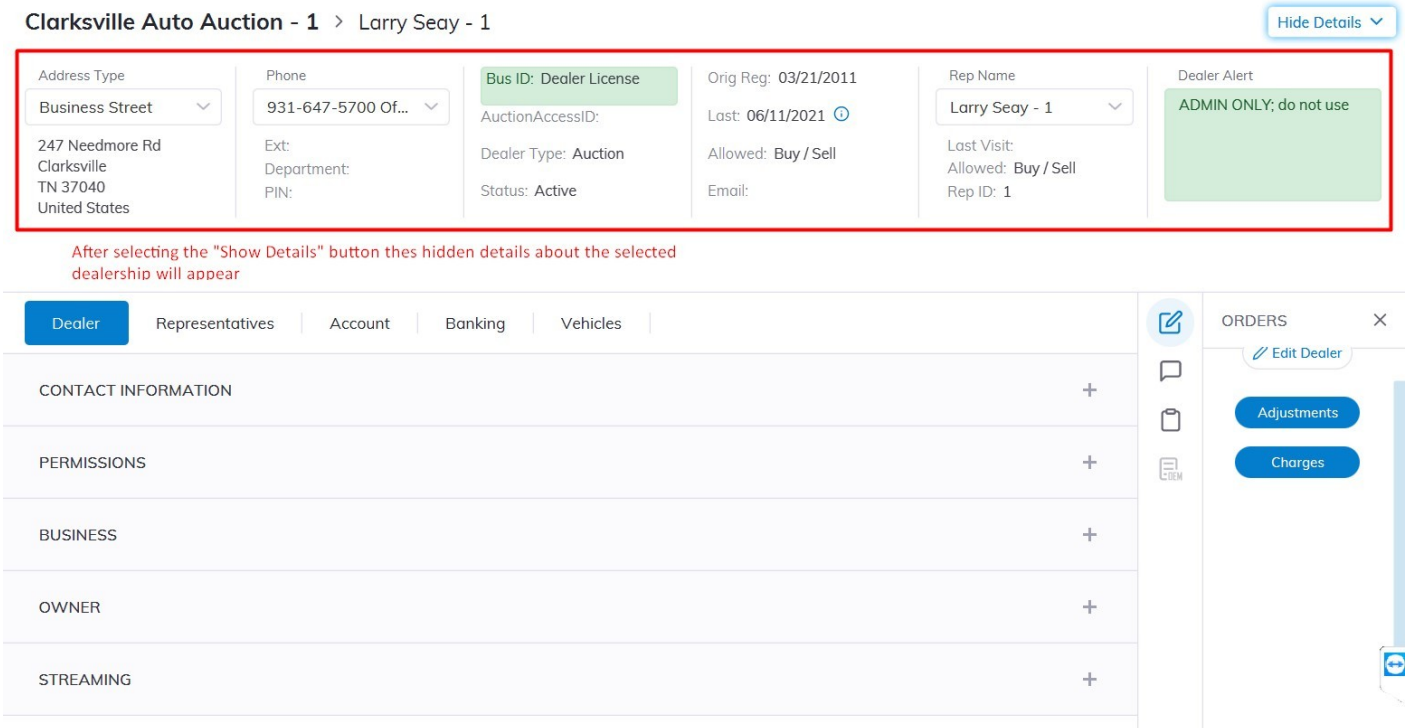
Show Details button: This button unhides hidden details about the Dealer selected.

Select

- **'Show Details'**

Note: Before selecting Show Details, ensure you have selected the dealer you want to view.





Dealer Orders

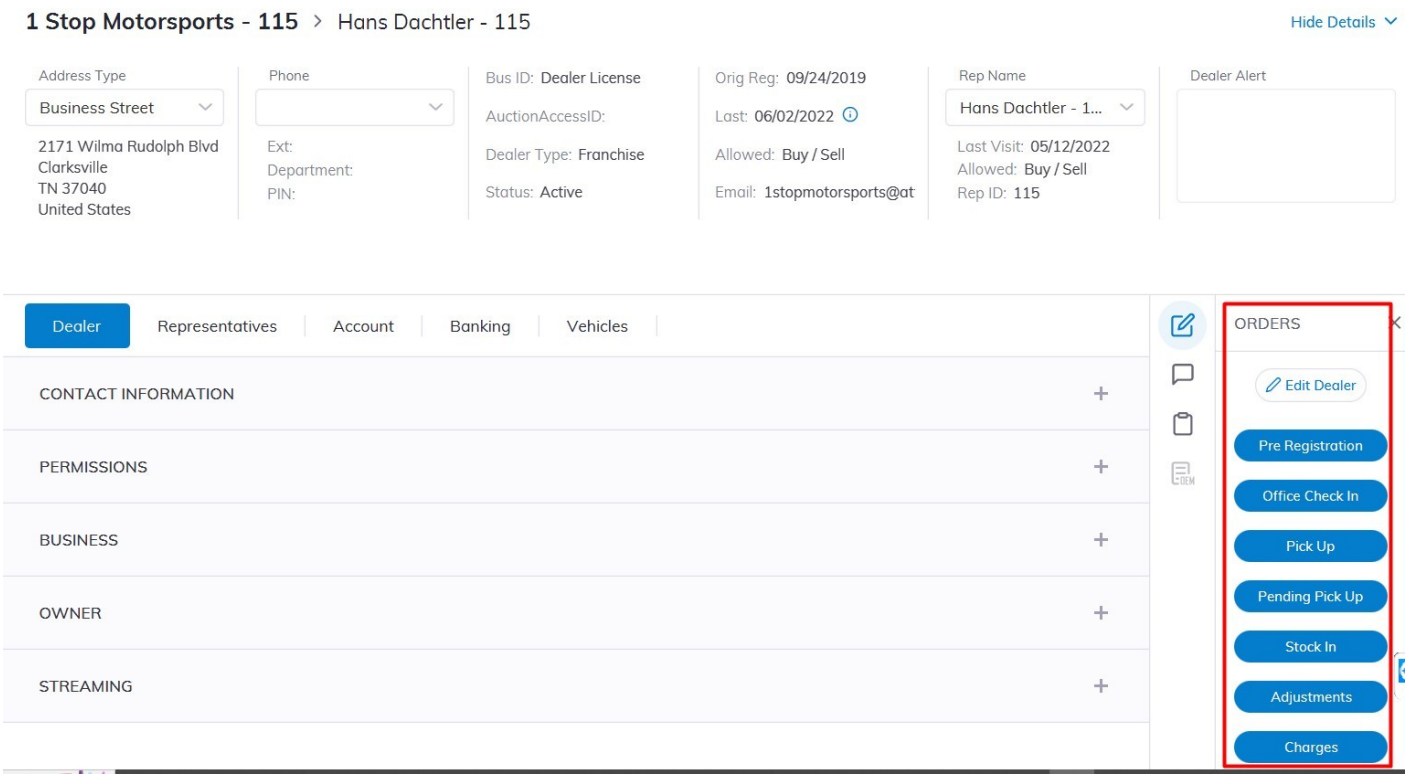
Dealer Orders

On the right-hand side of the Dealer Profile Application, you can select and choose any of the following Dealer Orders to execute.

- **Adjustments**
- **Charges**
- **Edit Dealer**
- **Office Check In**
- **Pending Pick Up**
- **Pick Up**
- **Pre Registration**
- **Stock In**

Click the Order button to launch the application window.

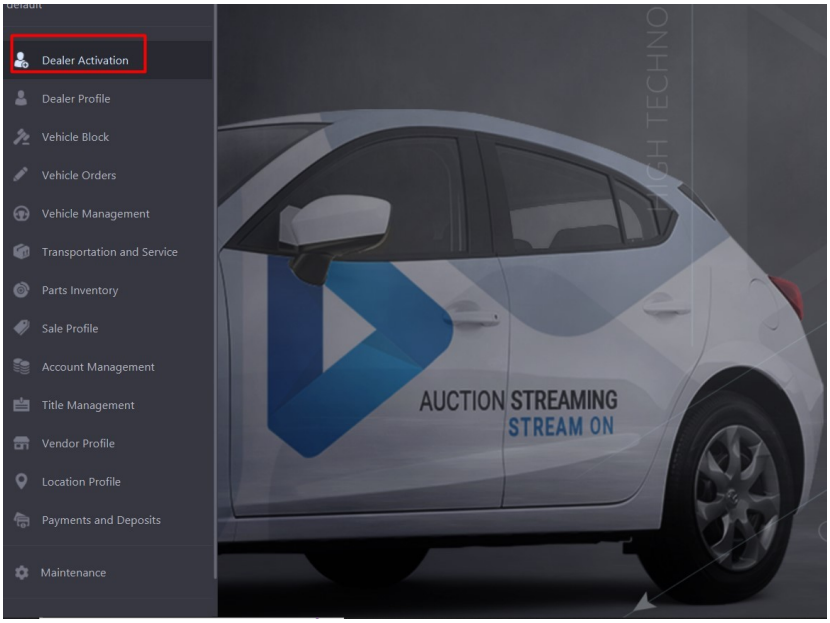
Note: Before issuing any of these Orders - make sure you have selected the correct dealer.



Dealer Activation

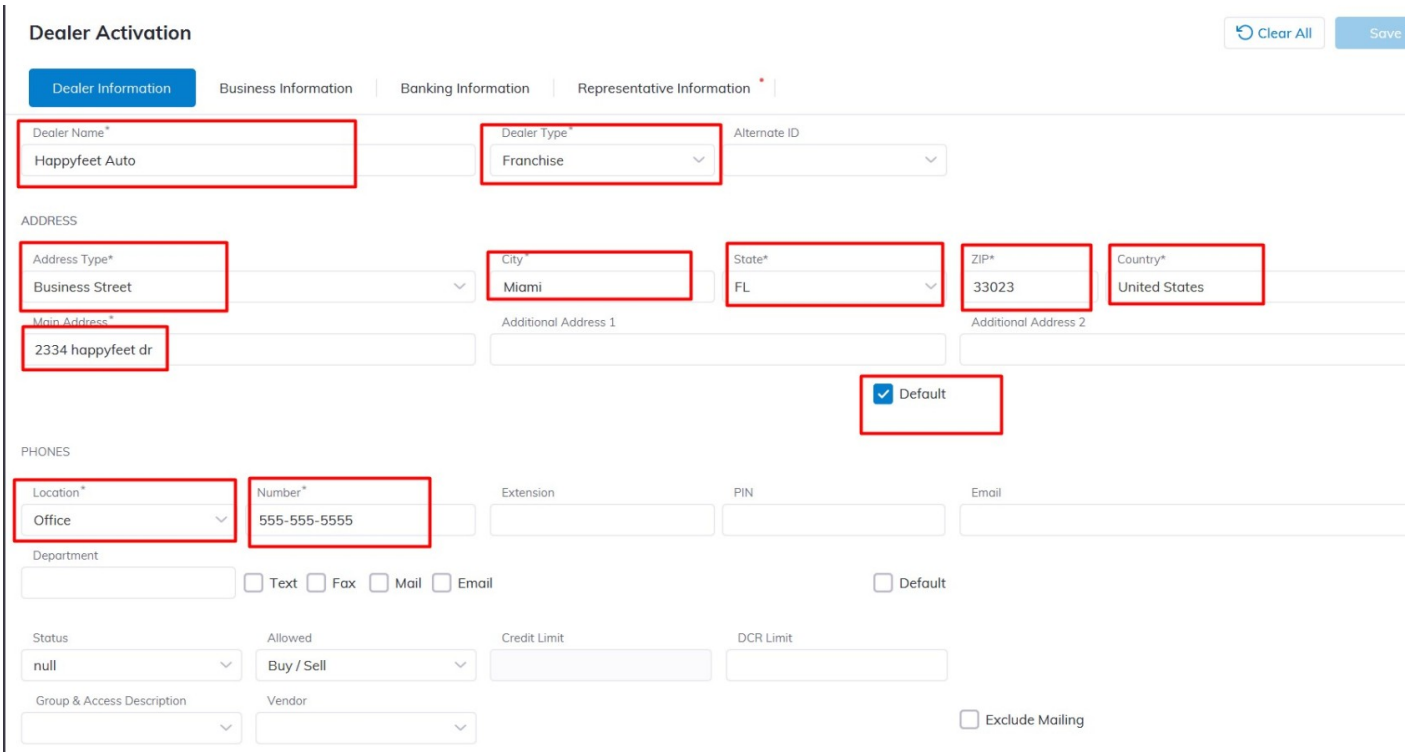
Dealer Activation

Select Dealer Activation from the main menu to launch the wizard that is used to add a new Dealer account.



When the Dealer Activation wizard pops up you will be on the

Dealer Information Tab



Input the following to create the new Dealer.

- **Dealer Name** (Name of the Dealership)
- For the **Dealer Type** Please select from the Dropdown menu:

Dealer Type (franchise, Public, Pool, or Independent)

- **First Name**
- **Last Name**
- For the Address **Location** field please select from the Dropdown e.g. Business street or Main
- **City**
- **State**
- **ZIP**
- **Country**
- **Main Address**

Check the Default checkbox to make this address the Default on this Dealership Account.

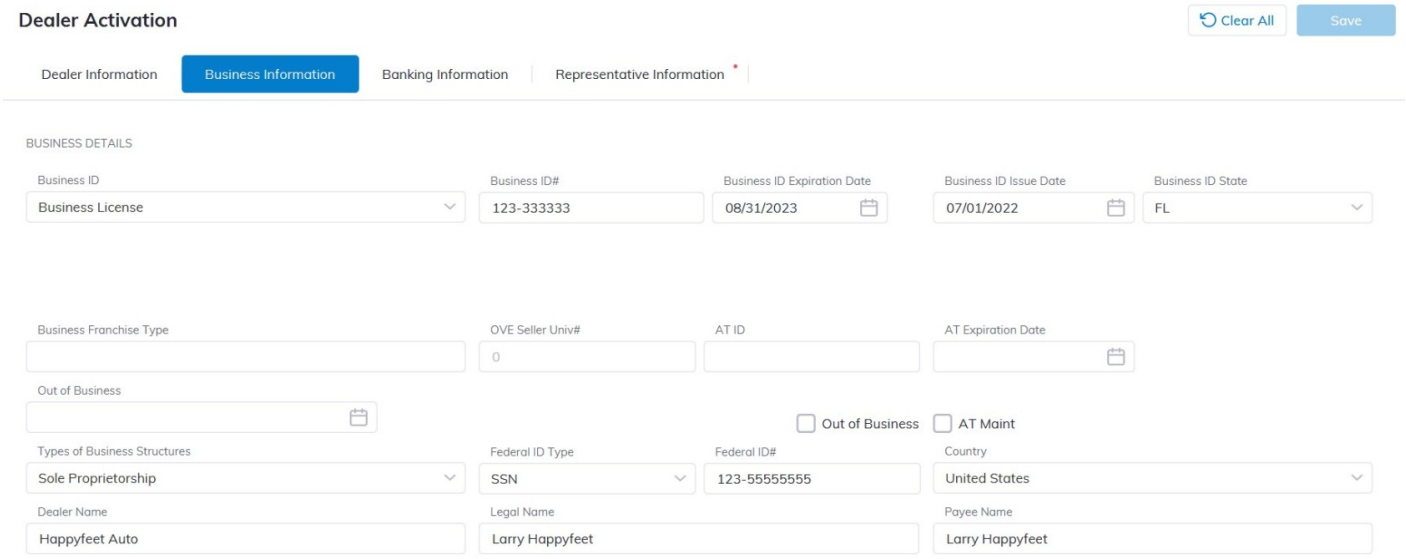
- **Phone**: for the Location field select from the Dropdown e.g. Main, Business, Office, or Headquarters then type the number in the number filed e.g. 555-555-5555

Status: choose the status that best reflects the business

Allowed: The default is Buy/Sell however you can choose the permission you want the Dealership to have here.

Buyer and Seller payment method: Here you choose the method of payment this Dealershuseill used e.g. Cash, Check, Credit, Debit, Wire, etc.

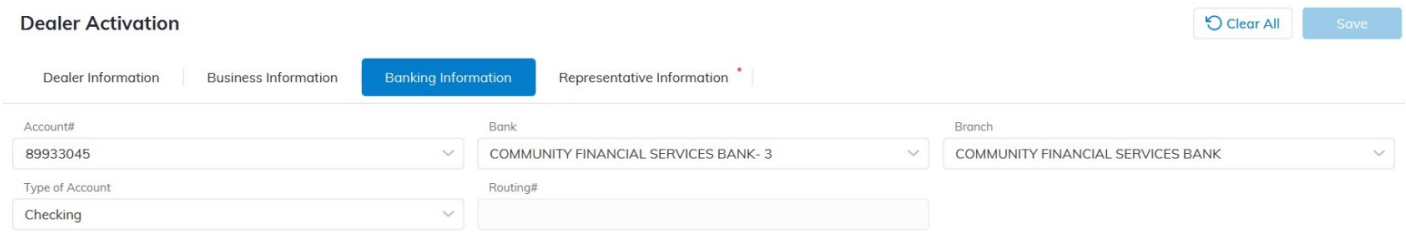
Business Information Tab



Input the following under the Business tab for the new dealer:

- **Business ID**
- **Business ID#**
- **Business ID State**
- **Business ID Exp.**
- **Business ID Issue Date**
- **Type of Business Structures**
- **Federal ID type**
- **Federal ID#**
- **Country**
- **Dealer Name**
- **Legal Name**
- **Payee Name**

Banking Information Tab

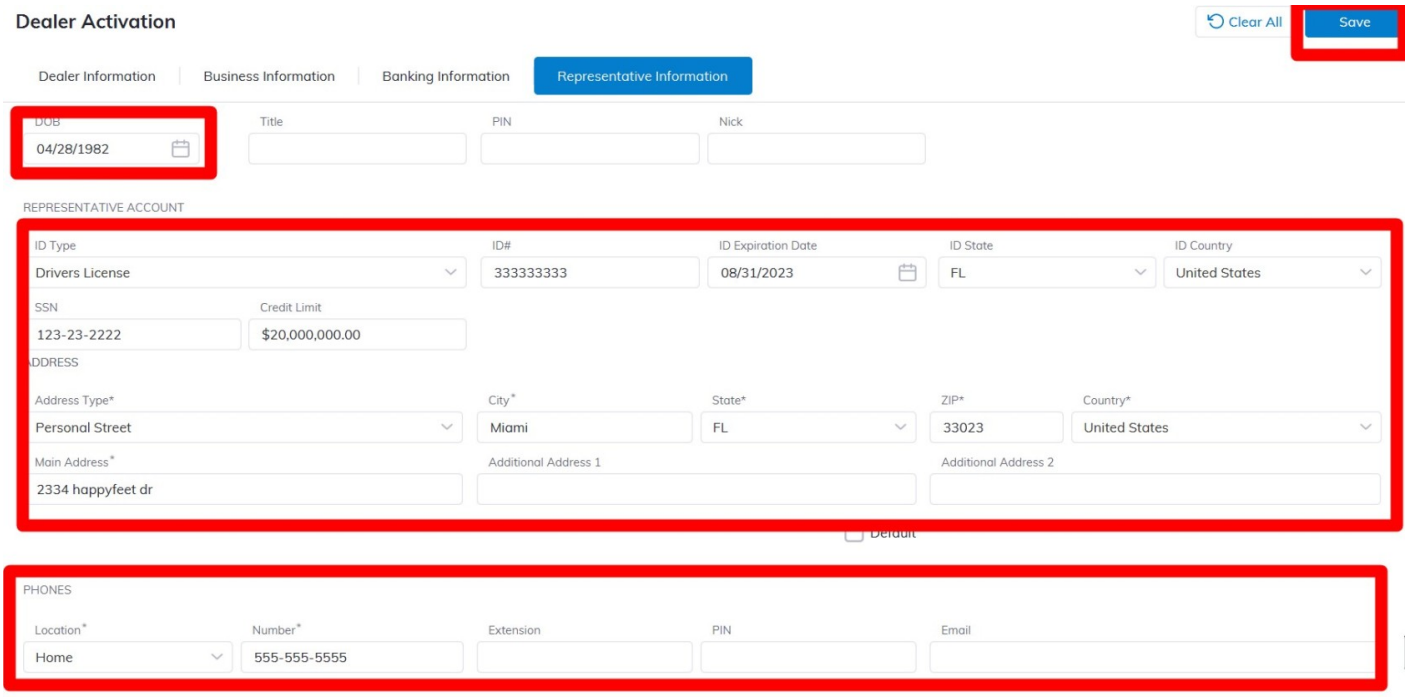


Input the following under the Banking Information tab for the new dealer:

- **Account#**
- **Bank**
- **Branch**
- **Type of Account e.g. Checking, Draft, or floor**

Representative Information Tab

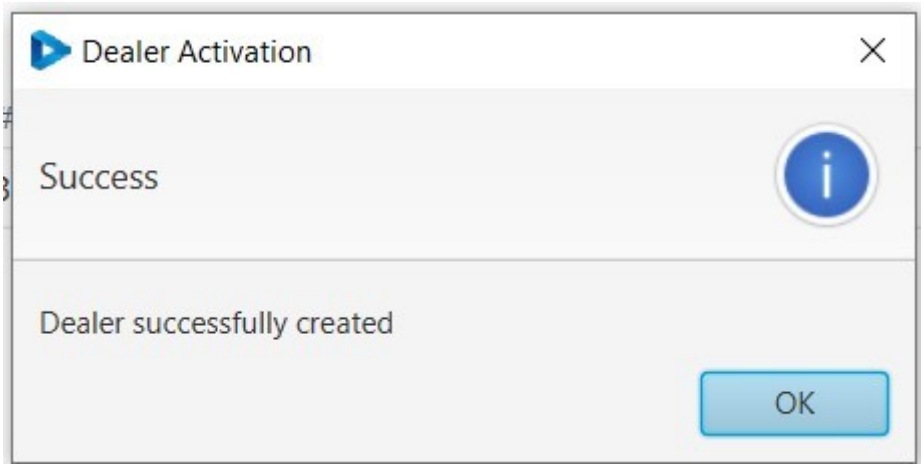
Input the following under the Representative Information tab for the new dealer:



- **First Name**
- **Last Name**
- **Date of Birth**
- **ID Type** e.g. Drivers license, Passport, State ID, etc.
- **ID#**
- **ID Expiration Date**
- **ID State**
- **ID Country**
- **SSN#**
- **Address type** (For the Address if the representative has a different address you can use or you can use the Dealership Address as default for the Rep Account.)
- **City**
- **State**
- **ZIP**
- **Country**
- **Main Address**
- **Phone Location** (You can add Office number, mobile, or Home)
- **Phone Number**

- **Email**

Click 'Save' to Save an alert window will inform you that the new Dealer was successfully created



Independent Dealer Activation

Public Entity Dealer Activation