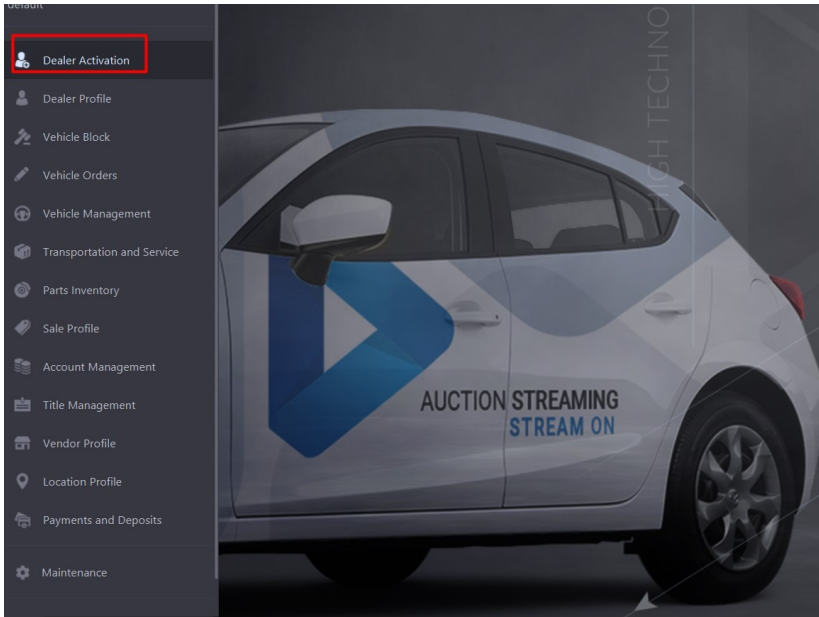


Dealer Activation

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

Dealer Activation Clear All Save

Dealer Information | Business Information | Banking Information | Representative Information *

Dealer Name* Dealer Type* Alternate ID

ADDRESS

Address Type* City* State* ZIP* Country*

Main Address* Additional Address 1 Additional Address 2

Default

PHONES

Location* Number* Extension PIN Email

Department Text Fax Mail Email Default

Status Allowed Credit Limit DCR Limit

Group & Access Description Vendor Exclude Mailing

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

Dealer Activation

[Clear All](#)[Save](#)[Dealer Information](#)[Business Information](#)[Banking Information](#)[Representative Information *](#)

BUSINESS DETAILS

Business ID Business License	Business ID# 123-333333	Business ID Expiration Date 08/31/2023	Business ID Issue Date 07/01/2022	Business ID State FL
Business Franchise Type	OVE Seller Univ# 0	AT ID	AT Expiration Date	
Out of Business	<input type="checkbox"/> Out of Business		<input type="checkbox"/> AT Maint	
Types of Business Structures Sole Proprietorship	Federal ID Type SSN	Federal ID# 123-55555555	Country United States	
Dealer Name Happyfeet Auto	Legal Name Larry Happyfeet	Payee Name Larry Happyfeet		

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

Dealer Activation

[Clear All](#)[Save](#)[Dealer Information](#)[Business Information](#)[Banking Information](#)[Representative Information *](#)

Account# 89933045	Bank COMMUNITY FINANCIAL SERVICES BANK- 3	Branch COMMUNITY FINANCIAL SERVICES BANK
Type of Account Checking	Routing#	

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:

Dealer Activation [Clear All](#) [Save](#)

Dealer Information | Business Information | Banking Information | **Representative Information**

DOB: 04/28/1982 Title: PIN: Nick:

REPRESENTATIVE ACCOUNT

ID Type	ID#	ID Expiration Date	ID State	ID Country
Drivers License	333333333	08/31/2023	FL	United States
SSN	Credit Limit			
123-23-2222	\$20,000,000.00			
ADDRESS				
Address Type*	City*	State*	ZIP*	Country*
Personal Street	Miami	FL	33023	United States
Main Address*	Additional Address 1	Additional Address 2		
2334 happyfeet dr				

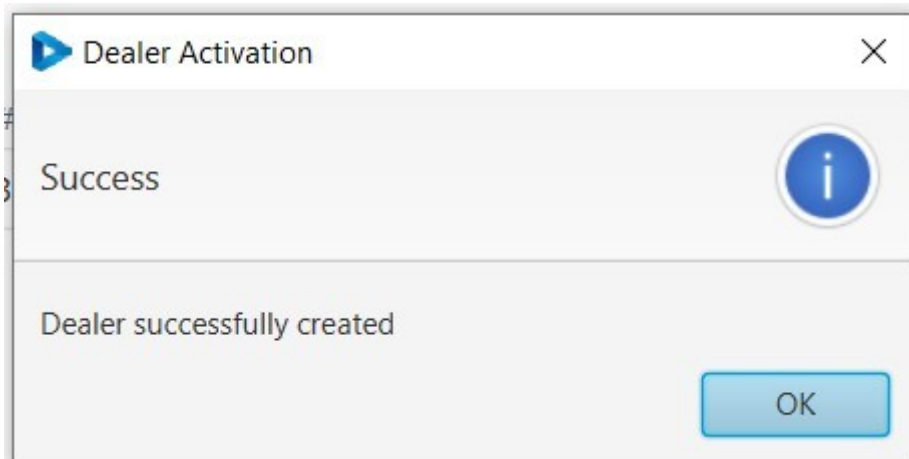
PHONES

Location*	Number*	Extension	PIN	Email
Home	555-555-5555			

- **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

Revision #4

Created 17 August 2022 16:59:16

Updated 2 November 2022 18:22:18