

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			SELLER		
<input checked="" type="checkbox"/> Cash	<input checked="" type="checkbox"/> Check	<input type="checkbox"/> Draft	<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"/> Wire		
<input type="checkbox"/> Credit	<input type="checkbox"/> TeleCheck	<input type="checkbox"/> Cashier			
<input type="checkbox"/> Debit	<input type="checkbox"/> TravCheck				<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.

Revision #4

Created 16 August 2022 18:52:51

Updated 20 October 2022 19:57:39