Appendix K Dealertrack

The Dealertrack integration allows you to transfer deal information to the Dealertrack Website. You will then log in to the Dealertrack Website, enter any additional information, and submit the credit application.

Dealertrack Integration Setup Verification

Autosoft's Customer Support Center will set up the integration between your FLEX DMS F&I account and Dealertrack to allow you to transfer deal information to Dealertrack. **You do not need to take any steps to set up the integration.** You can, however, verify that the integration has been established. To verify the account, follow these steps:

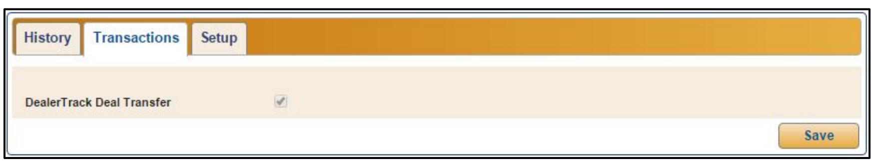
1. Click the **Admin** link in the top right corner of the screen above the blue navigation bar.

2. Click the **Integrations** tab in the blue navigation bar.

3. From the Integrations list in the left navigation panel, click **Dealertrack**.

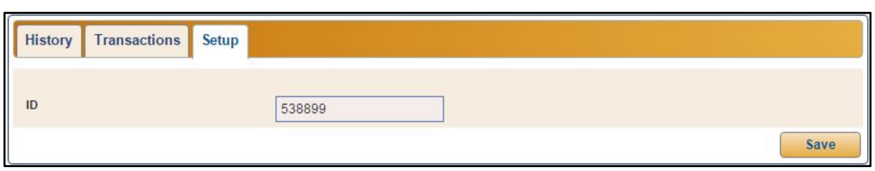
4. Click the **Transactions** tab and verify that the **Dealertrack Deal Transfer** box is checked.

   If the Dealertrack Deal Transfer box is not checked, contact a FLEX DMS F&I support representative in the Autosoft Customer Support Center for assistance.



5. Click the **Setup** tab and verify that the ID assigned to your dealership by Dealertrack appears in the **ID** field.

   If the ID field is empty, contact a FLEX DMS F&I support representative in the Autosoft Customer Support Center for assistance.



Submitting Deal Information

You will use the **Integrations** link on the Deal menu to transfer the deal information. This process simply transfers the deal information to Dealertrack. You must log in to the Dealertrack Website to complete and submit the credit application.

1. Create the deal.

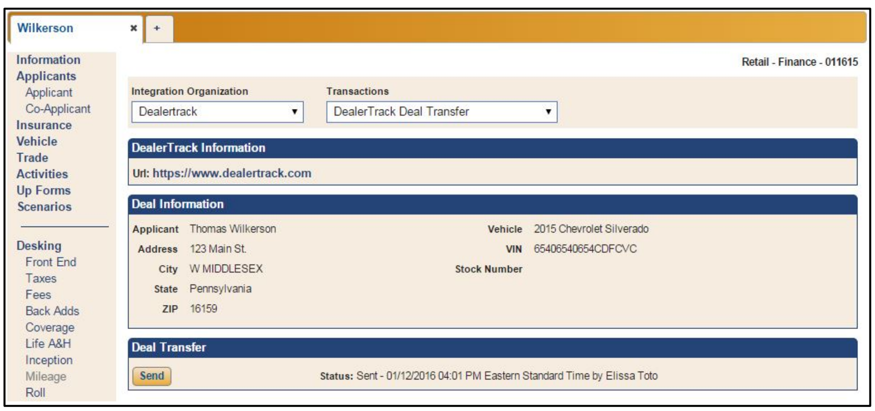
2. Click **Integrations** in the left navigation panel.

3. In the **Integration Organization** drop-down menu, select **Dealertrack**

4. Select **Dealertrack Deal Transfer** in the **Transactions** list.

5. In the Deal Transfer section, click **Send**.

6. The deal information will be sent, and the status will read, “Sent,” followed by the time stamp for the transfer.



If the information contains errors, the status will read, “Rejected,” followed by the time stamp for the transfer, and the program will display an error message identifying the information that must be corrected. Correct the information and resend the deal.

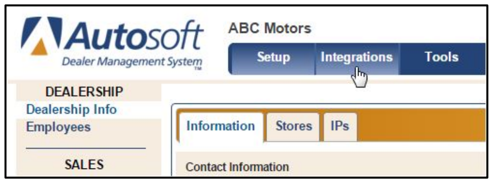
7. Click the URL in the screen’s **Dealertrack Information** section to go to the log in page of the Dealertrack Website. You will need to review the deal information and enter any necessary additional information. The credit application is not complete until you finish submitting it through Dealertrack Website.

Reviewing the Dealertrack Transaction Log

Users with administrative rights (those who can access the setup) can review the Dealertrack transaction log. This allows you to review which deals were successfully transmitted and which deals did not go through. You can submit deals from the log as needed.

1. Click the **Admin** link in the top right corner of the screen above the blue toolbar.

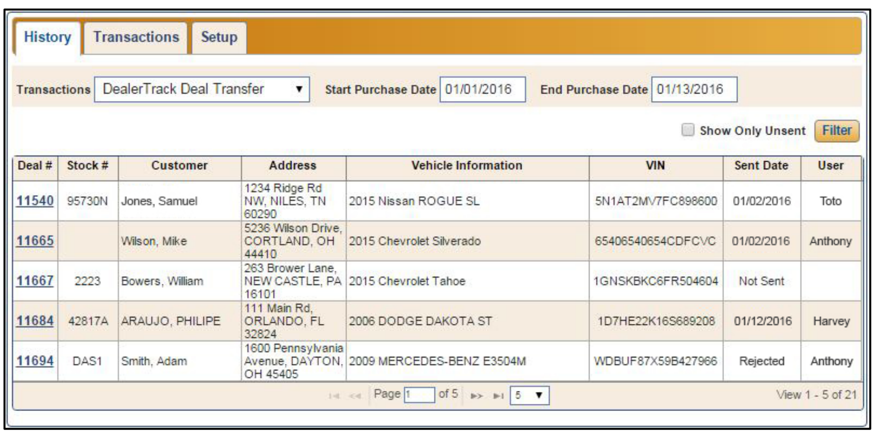
2. Click the **Integrations** tab in the blue navigation bar.



3. Click **Dealertrack** in the Integrations list in the left navigation panel.

4. The **History** tab displays all the open deals.

5. The **Sent Date** column identifies the date the deal was sent. The column displays “Not Sent” for deals that have not been submitted or “Rejected” for deals that Dealertrack did not accept.



6. You can filter the list using the **Start Purchase Date** and **End Purchase Date** fields.

7. To view only the deals that have not been sent to Dealertrack, check the **Show Only Unsent** box and click **Filter**.

8. Click a deal in the list to view a summary of the deal information.

9. You can click **Send** to submit the deal right from this screen.