Appendix M TriVIN

FLEX DMS F&I integrates with TriVIN. Through the integration, you can select the deals you wish to register, and FLEX DMS F&I will save the information to an XML file. TriVIN can then pick up the file from the designated directory.

TriVIN Integration Setup Verification

Autosoft's Customer Support Center will set up the integration between your FLEX DMS F&I account and TriVIN to allow you to share information to TriVIN. **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. In the blue navigation bar, click **Integrations**.

3. From the Integrations list in the left navigation bar, click **TriVIN**.

4. Click the **Transactions** tab.

5. Ensure that the **TriVIN Send Deal** box is checked and click **Save**.
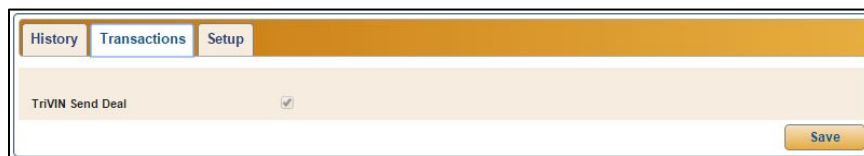
Generating the TriVIN XML Files

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

2. In the blue navigation bar, click the **Integrations** tab.

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

4. The **History** tab displays closed deals.

5. The system lists the deals from the beginning of the current month to date. You can edit the date range as needed by typing the desired dates in the **Start Purchase Date** and **End Purchase Date** fields or clicking in the fields to open a calendar from which you can select the appropriate dates.

6. Click to check the **Save** box in front of the deals you wish to send.

7. Click **Save Selected**. You can also click **Save All Unsaved** if you wish to save all the displayed deals to the xml file.

8. The file will be downloaded. Depending on your Web browser setting, you will access the file in one of two ways.

   In the first method, a download button will appear at the bottom left corner of your Web browser window. Click the download button to open the file.

   In the second method, a dialog box will open after you click one of the save options. Click to select **Open with**, and click **OK**.
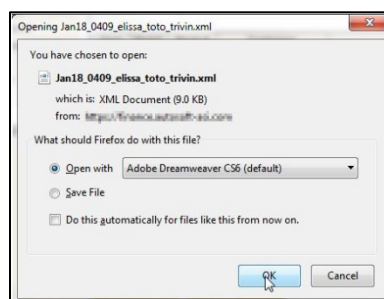
9. In either method, the file will open in the default XML editor for your computer, which will most likely be your Internet browser.

10. Click **File**, and select **Save As**.

11. In the **Save As** dialog, make sure the **Save In** location displays the designated folder. TriVIN designates this location. You must ensure you are saving the XML files in this location in order for TriVIN to pick up the files.

12. Click **Save**.

13. The **Saved** column on the TriVIN integration screen will identify the file name used for the file, which consists of the date and user name for the user who generated the XML file.

   The list defaults to the first five employees in your dealership based alphabetically on last name. To expand the list, click the down arrow beneath the list and choose a different number of employees to display from the drop-down menu. If the employee does not appear on the first page of the expanded list, use the directional arrows beneath the list to navigate to the appropriate employee listing.