

## 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.



The screenshot shows a web interface with three tabs: 'History', 'Transactions', and 'Setup'. The 'Transactions' tab is selected. Below the tabs, there is a section labeled 'DealerTrack Deal Transfer' with a checked checkbox. A 'Save' button is located at the bottom right of the section.

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.



The screenshot shows the same web interface as the previous screenshot, but now the 'Setup' tab is selected. The 'ID' field is populated with the value '538899'. A 'Save' button is located at the bottom right of the section.

## 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.

The screenshot shows a web interface for a user named 'Wilkerson'. On the left is a navigation menu with options: Information, Applicants, Applicant, Co-Applicant, Insurance, Vehicle, Trade, Activities, Up Forms, and Scenarios. The main area has two dropdown menus: 'Integration Organization' set to 'Dealertrack' and 'Transactions' set to 'DealerTrack Deal Transfer'. The top right corner displays 'Retail - Finance - 011615'.

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.

This screenshot shows the same interface as the previous one, but with additional information displayed. Below the dropdown menus, there are three sections:
 

- DealerTrack Information**: Shows the URL 'https://www.dealertrack.com'.
- Deal Information**: A table with the following data:
 

Applicant	Thomas Wilkerson	Vehicle	2015 Chevrolet Silverado
Address	123 Main St.	VIN	65406540654CDFCV/C
City	W MIDDLESEX	Stock Number	
State	Pennsylvania		
ZIP	16159		
- Deal Transfer**: Contains a 'Send' button and a status message: 'Status: Sent - 01/12/2016 04:01 PM Eastern Standard Time by Elissa Toto'.

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.

Deal #	Stock #	Customer	Address	Vehicle Information	VIN	Sent Date	User
<a href="#">11540</a>	95730N	Jones, Samuel	1234 Ridge Rd NW, NILES, TN 60290	2015 Nissan ROGUE SL	5N1AT2MV7FC898600	01/02/2016	Toto
<a href="#">11665</a>		Wilson, Mike	5236 Wilson Drive, CORTLAND, OH 44410	2015 Chevrolet Silverado	65406540654CDFCVC	01/02/2016	Anthony
<a href="#">11667</a>	2223	Bowers, William	263 Brower Lane, NEW CASTLE, PA 16101	2015 Chevrolet Tahoe	1GNSKBK06FR504604	Not Sent	
<a href="#">11684</a>	42817A	ARAUJO, PHILIPPE	111 Main Rd, ORLANDO, FL 32824	2008 DODGE DAKOTA ST	1D7HE2K16S689208	01/12/2016	Harvey
<a href="#">11694</a>	DAS1	Smith, Adam	1600 Pennsylvania Avenue, DAYTON, OH 45405	2009 MERCEDES-BENZ E3504M	WDBUF87X59B427966	Rejected	Anthony

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.

History
Transactions
Setup

Transactions DealerTrack Deal Transfer
Start Purchase Date 01/01/2016
End Purchase Date 01/13/2016

Show Only Unsent Filter

Deal #	Stock #	Customer	Address	Vehicle Information	VIN	Sent Date	User
11540	95730N	Jones, Samuel	1234 Ridge Rd NW, NILES, TN 60230	2015 Nissan ROGUE SL	5N1AT2M77FC898600	01/02/2016	Toto
11665		Wilson, Mike	5236 Wilson Drive, CORTLAND, OH 44410	2015 Chevrolet Silverado	65406540654CDFCVC	01/02/2016	Anthony
11667	2223	Bowers, William	263 Brower Lane, NEW CASTLE, PA 16101	2015 Chevrolet Tahoe	1GNSKBK06FR504604	Not Sent	
11684	42817A	ARAUJO, PHILIPPE	111 Main Rd, ORLANDO, FL 32824	2006 DODGE DAKOTA ST	1D7HE22K16S689208	01/12/2016	Harvey
11694	DAS1	Smith, Adam	1600 Pennsylvania Avenue, DAYTON, OH 45405	2009 MERCEDES-BENZ E3504M	WDBUF87X59B427966	Rejected	Anthony

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**DealerTrack Information**  
 Uri: <https://www.dealertrack.com>

**Deal Information**  

Applicant William Bowers	Vehicle 2015 Chevrolet Tahoe
Address 263 Brower Lane	VIN 1GNSKBK06FR504604
City NEW CASTLE	Stock Number 2223
State Pennsylvania	
ZIP 16101	

**Deal Transfer**  

Send
Status: Not Sent