



# DEALERVAULT<sup>®</sup>

by AUTHENTICOM<sup>™</sup>

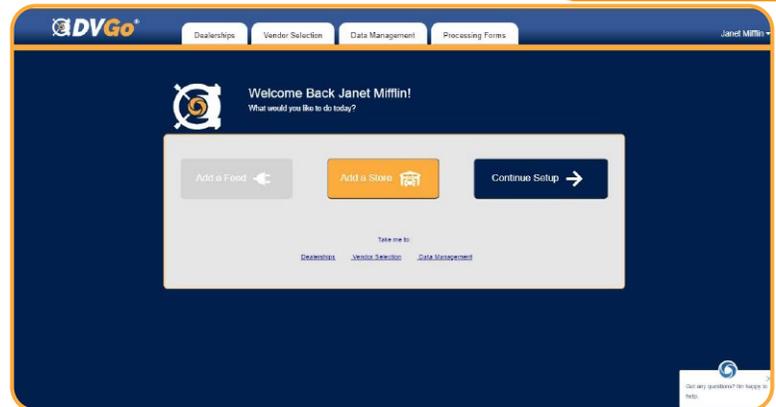
## DEALER USER GUIDE

The image displays two overlapping screenshots of the Dealer Vault system. The top screenshot shows the main navigation menu with options: Home, Group Management, Data Management (with a dropdown arrow), and Michael Scott (with a dropdown arrow). A question mark icon is visible in the top right corner. The bottom screenshot shows a user dashboard for 'Dunder Mifflin Motors' with a 'Data Opt-Out' section. It includes a 'State Consumer Opt-Out' form and a table with one entry: 'Cargill Chevrolet Buick GMC Inc.' Below the table, it says 'Showing 1 to 1 of 1 entries'. There is also an 'Individual Consumer Opt-Out' section. The dashboard header for 'DVGo' includes tabs for 'Dealerships', 'Vendor Selection', 'Data Management', and 'Processing Forms'. A personalized welcome message reads 'Welcome Back Janet Mifflin! What would you like to do today?'. Action buttons include 'Add a Feed' (with a plug icon), 'Add a Store' (with a car icon), and a partially visible 'Continue' button. At the bottom, there are links for 'Dealerships', 'Vendor Selection', and 'Data Management' under the heading 'Take me to:'.

<b>User Registration</b>	3
<b>Main Header Navigation</b>	4
DealerVault Dashboard	5
Authorization Bar	5
<b>Add Feeds</b>	6
<b>Edit Feeds</b>	7
<b>Pending Activities Page</b>	8
Feed Approval Icon	8
Feed Approval Through Email	9
Cancel Feed Icon	9
<b>Completed Feeds Page</b>	10
Show Deactivated Feeds	10
Feed Activation Toggle	10
<b>Data Content Summary</b>	11
<b>View Reports Page</b>	12
<b>Group Management Page</b>	13
<b>Mapping</b>	14
<b>Data Opt-Out</b>	15
<b>User Management Page</b>	17
Edit Profile	18
Reset Password	18
Disable/Enable User	18
<b>Add User/Role Definitions</b>	19
Group Admin	19
Store Access	19
Store Admin	19

## What is DVGo?

DVGo is DealerVault's onboarding and DMS setup tool. It allows dealers to create their Dealer Group account on the DealerVault platform with accuracy and gives them control and visibility into their DMS setup. Through our guided interface, dealers can set up which dealership locations they are managing, and receive customized DMS configuration instructions which expedites the data collection process. DVGo serves as a resource for dealers to revisit setup documentation and receive troubleshooting tips for disruptions in their data flow.



## Benefits of DVGo

- Ensure accurate dealership information is collected
- Visibility into the data extraction process
- Easily setup additional stores using a guided interface
- Control over what file types/vendors are setup
- Electronically sign DMS forms using DocuSign

## Getting Started

1.

ENTER YOUR  
EMAIL ADDRESS  
AND CREATE  
YOUR PASSWORD

2.

VERIFICATION  
EMAIL  
SENT TO  
YOUR INBOX



Please verify your  
email address

We have sent you a verification email.  
Please check your inbox and click the  
verification link in the email. Once you have  
verified your email, you can log in here:

Sign In

If you do not receive an email, check your  
spam folder or contact DealerVault Support.

support@dealervault.com

1-866-289-3283

3.

### VERIFY YOUR EMAIL ADDRESS

Go to your inbox and follow the link to verify your email address.



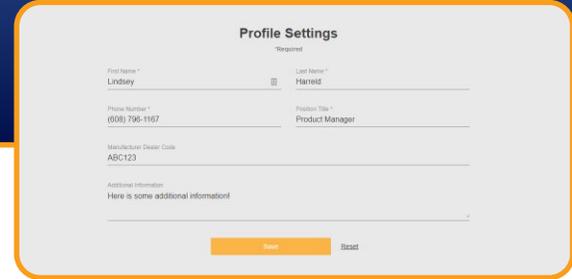
Welcome to DealerVault!

Thank you for signing up. Please verify your email address by clicking the following link: [Confirm my account](#).  
If you are having any issues with your account, please don't hesitate to contact us by replying to this mail

4.

### ENTER USER PROFILE SETTINGS

Fill out the User's contact information and add any additional information.



**Profile Settings**  
\*Required

First Name \* Lindsey  
Last Name \* Harrod

Phone Number \* (000) 796-1167  
Product Title \* Product Manager

Manufacturer Dealer Code ABC123

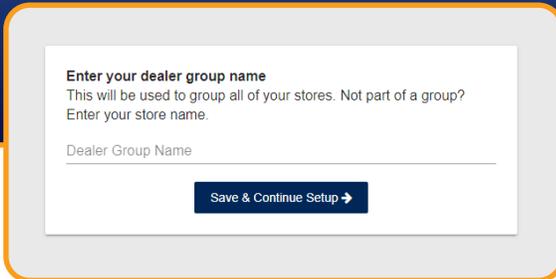
Additional Information  
Here is some additional information

Save Reset

5.

### ENTER YOUR DEALER GROUP NAME

This will be used to group all of your stores. Not part of a group? Enter your store's name.



**Enter your dealer group name**  
This will be used to group all of your stores. Not part of a group? Enter your store name.

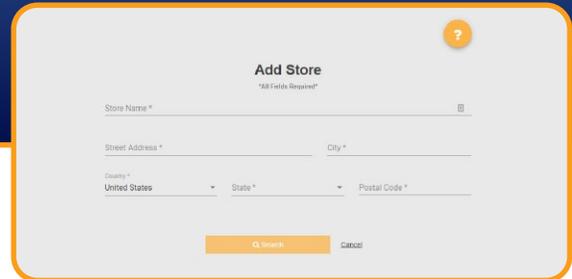
Dealer Group Name

Save & Continue Setup →

6.

### ADD STORE

Enter your first store's name and address information.



**Add Store**  
\*All Fields Required

Store Name \*

Street Address \* City \*

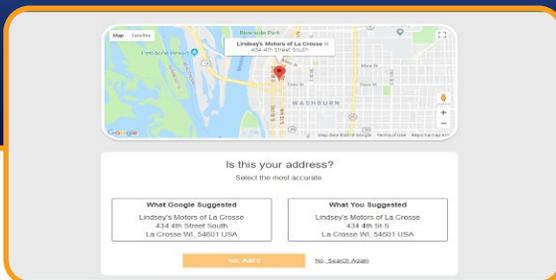
Country \* United States State \* Postal Code \*

Search Cancel

7.

### VERIFY YOUR STORE ADDRESS

Choose the most accurate address between what Google suggests or the address entered.



Is this your address?  
Select the most accurate

**What Google Suggested**  
Lindsey's Motors of La Crosse  
434 4th Street South  
La Crosse WI, 54601 USA

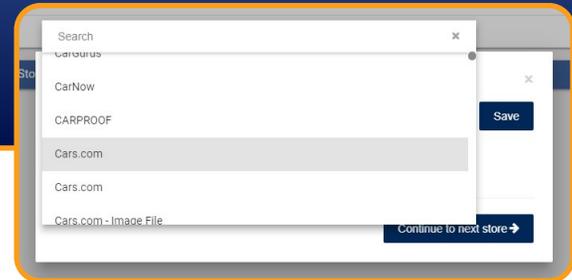
**What You Suggested**  
Lindsey's Motors of La Crosse  
434 4th St S  
La Crosse WI, 54601 USA

Yes, that's it No, Search Again

8.

### ADD YOUR VENDORS

Select and add vendor affiliations to your store. You can add multiple vendors per store profile.



Search

CarNow  
CARPROOF  
Cars.com  
Cars.com  
Cars.com - Image File

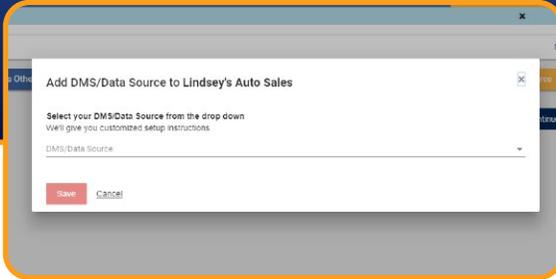
Save

Continue to next store →

9.

## ADD DMS/ DATA SOURCE

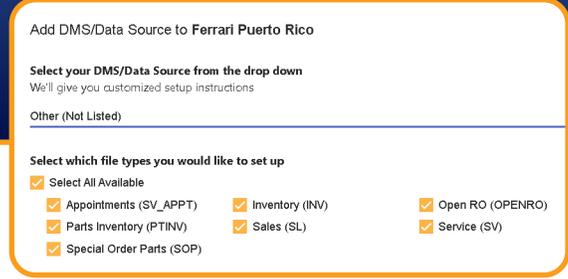
Select your DMS/Data Source(s) from the drop down menu and configure settings.



10.

## ADD YOUR FILE TYPES

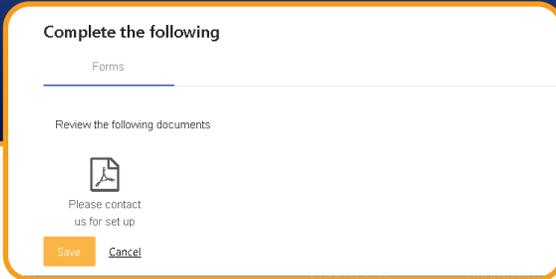
Select all, or choose the specific file types to associate with your DMS/Source Selection.



11.

## DOCUMENTS AND FORMS

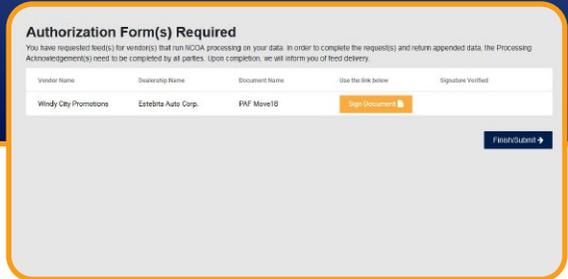
Download important documents and forms and enter credentials where applicable.



12.

## AUTHORIZATION FORMS

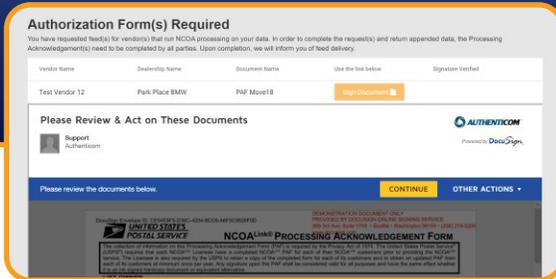
Some programs need additional processing, these must be completed before submission.



13.

## REVIEW AND DOCUSIGN

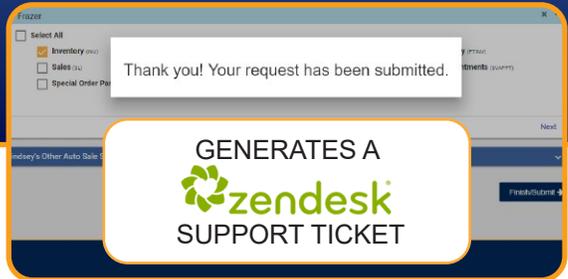
Use DocuSign within DVGo to authorize additional processing to your data.



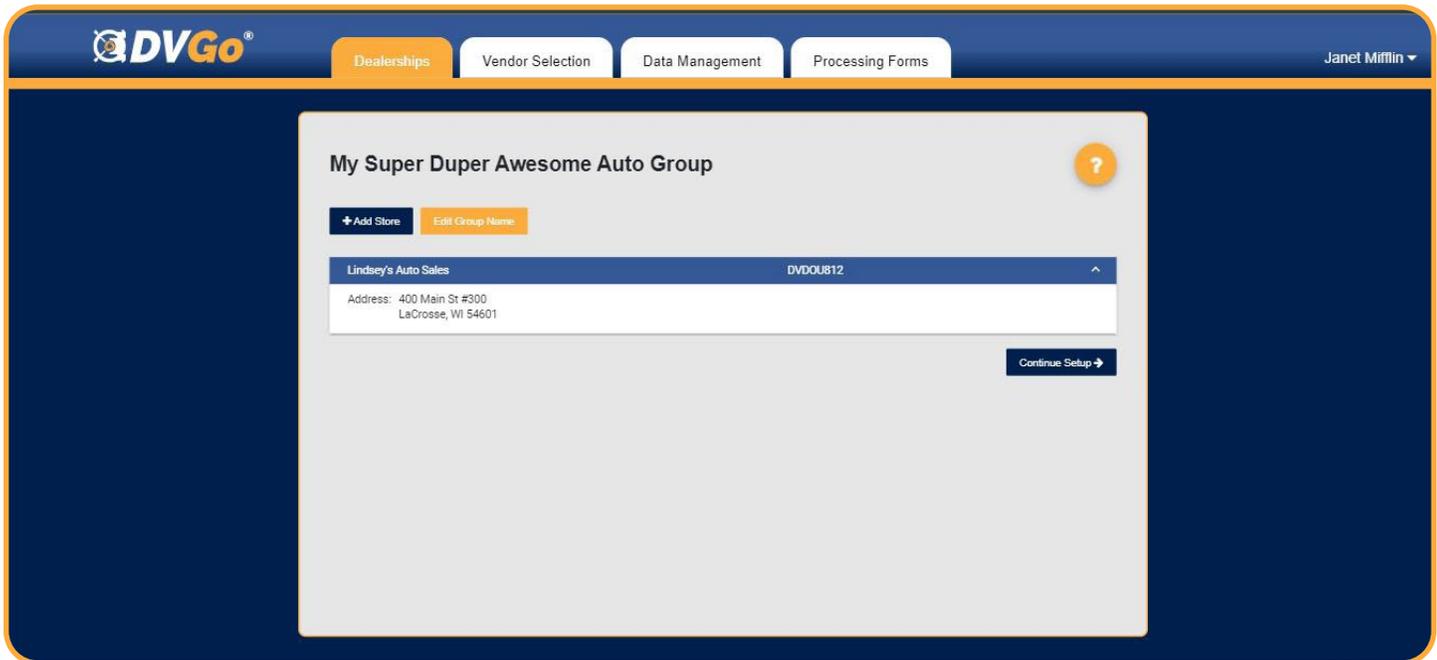
14.

## SUBMIT REQUEST

When you submit your request our internal staff is notified and will begin data integration.



## MANAGING YOUR DEALERSHIPS WITH



Once you've set up your first store, managing your data is easy. DVGo's intuitive tab system follows the flow of the DVGo setup process that allows you to take control of your data delivery connections. Under the Dealership tab, you can add stores to your list by entering and verifying your store addresses. DVGo even double checks your address entry against Google to reassure you that it's right the first time.

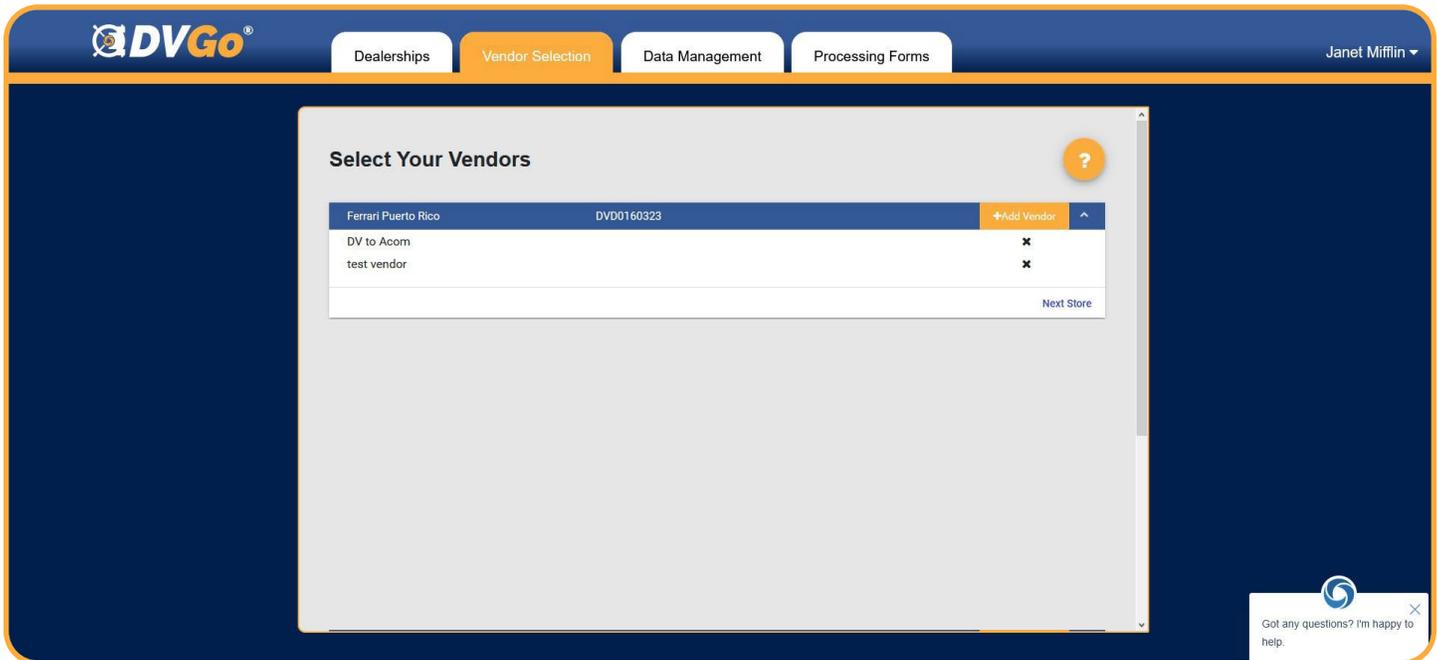
### +Add Store

The +Add Store button will bring you back to step 6 in the onboarding process. After the address is verified, DVGo will add another manageable store to your list.

### Edit Group Name

The Edit Group Name button gives you access to edit your dealer group name. If you are not part of a group, use your dealership name.

## MANAGING YOUR VENDORS WITH



A vendor sells you a program that will help you sell more vehicles or improve the operations of your dealership. They need data to make that program work. The Vendor Selection tab gives you access to manage your store/vendor relationships. Under each store, you will find a list of the associated vendors. You have the freedom to add or remove as many vendors as needed per store.

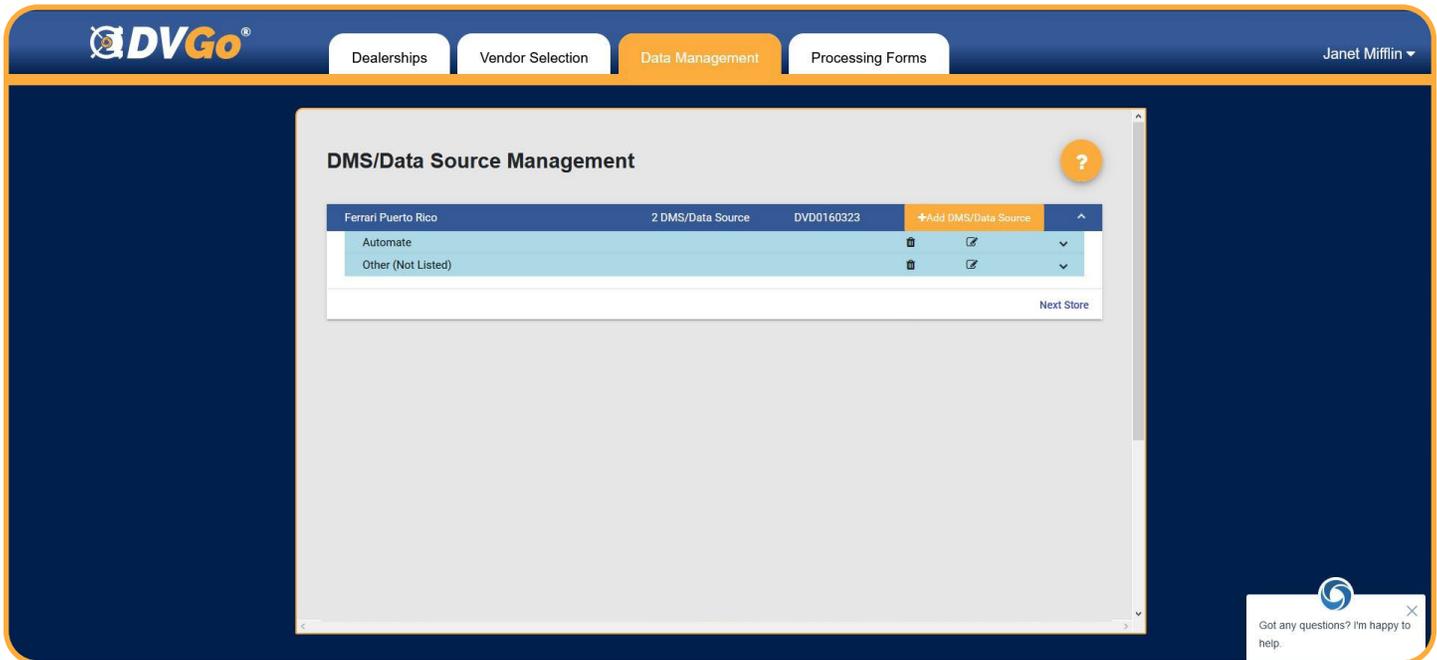
**+Add Vendor**

The +Add Vendor button opens a drop down menu with a list of affiliated vendors to choose from. Add as many as needed per store.

**X**

The X is the symbol used throughout DVGo as an indicator that you can remove the item from the list. You will be asked to verify these actions to ensure that no mistakes are made with the edit.

## MANAGING YOUR DATA WITH



DVGo will help you set up extractions from your DMS by providing you the instructions and authorization forms needed to get your data flowing! Technical set up requirements, such as credentials or FTP connection settings, can also be managed on this tab. It is important to note that some of these processes can take time. If you need to log off to complete these steps, you can pick up where you left off the next time you sign in.

**+Add DMS/Data Source**

The +Add DMS/Data Source button will bring up a drop down menu with associated DMS connections. You can select and add as many sources as necessary per store.

**X**

Removes DMS/ Data Source from store listing. You will be asked to verify the action before removing the source from your store setup.

## MANAGING YOUR FILE TYPES WITH



Add DMS/Data Source to Ferrari Puerto Rico ×

Select your DMS/Data Source from the drop down

We'll give you customized setup instructions

Other (Not Listed) ▾

Select which file types you would like to set up

Select All Available

Appointments (SV\_APPT)

Inventory (INV)

Open RO (OPENRO)

Parts Inventory (PTINV)

Sales (SL)

Service (SV)

Special Order Parts (SOP)

Choosing your file types by DMS/Data Source per store allows you to manage what kind of data your vendors will receive from each DMS/ Data Source through the data acquisition process. DealerVault is a one-time setup process. The benefit of selecting all available file types for your DMS/Data Source is that it will allow you to activate future vendor feeds as you grow your business.

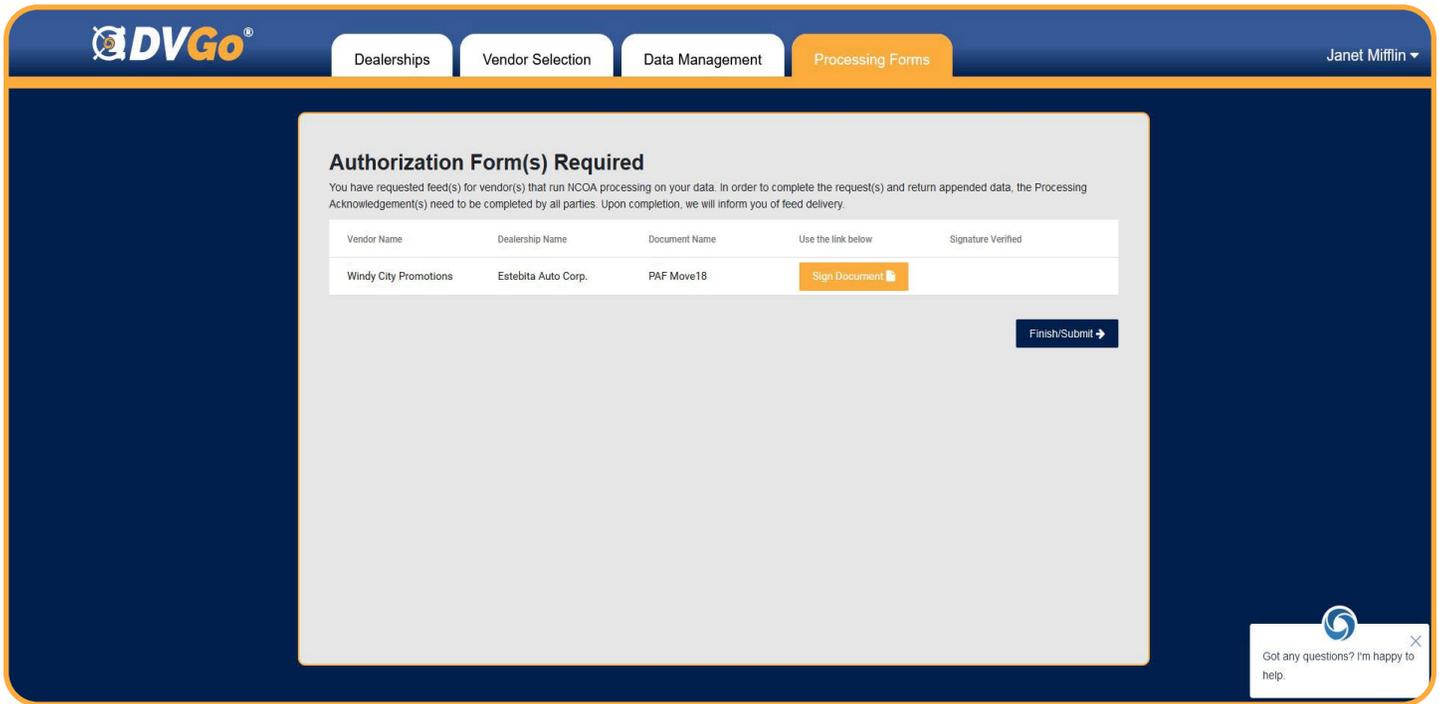
After you've made your selections and hit the submit button, DVGo creates a support ticket that tells our team to begin processing your data. If additional information or assistance is needed from the dealership, our team will work with you directly.



Select All Available

Save time on future vendor integrations by selecting all available file types from your DMS/Data Source during setup.

## PROCESSING AUTHORIZATION FORMS WITH



The screenshot shows the DVGo web application interface. At the top, there is a navigation bar with the DVGo logo on the left and the name 'Janet Miffin' on the right. Below the navigation bar are several tabs: 'Dealerships', 'Vendor Selection', 'Data Management', and 'Processing Forms'. The 'Processing Forms' tab is currently selected. The main content area displays a section titled 'Authorization Form(s) Required'. Below the title, there is a paragraph of text explaining the requirement for NCOA processing. A table follows, listing vendor and dealership information. The table has five columns: 'Vendor Name', 'Dealership Name', 'Document Name', 'Use the link below', and 'Signature Verified'. The first row contains the following data: 'Windy City Promotions', 'Estebita Auto Corp.', 'PAF Move18', a 'Sign Document' button, and a 'Signature Verified' column. Below the table is a 'Finish/Submit' button. In the bottom right corner, there is a small chat bubble that says 'Got any questions? I'm happy to help.'

Vendor Name	Dealership Name	Document Name	Use the link below	Signature Verified
Windy City Promotions	Estebita Auto Corp.	PAF Move18	<a href="#">Sign Document</a>	

DVGo will help you make sure that you get all the proper Authorizations initiated before starting ... Dependency Vendor Program Selection and Sales and/or Service File Types selected with additional NCOA processing to data feed for historical deliveries.

**Sign Document**

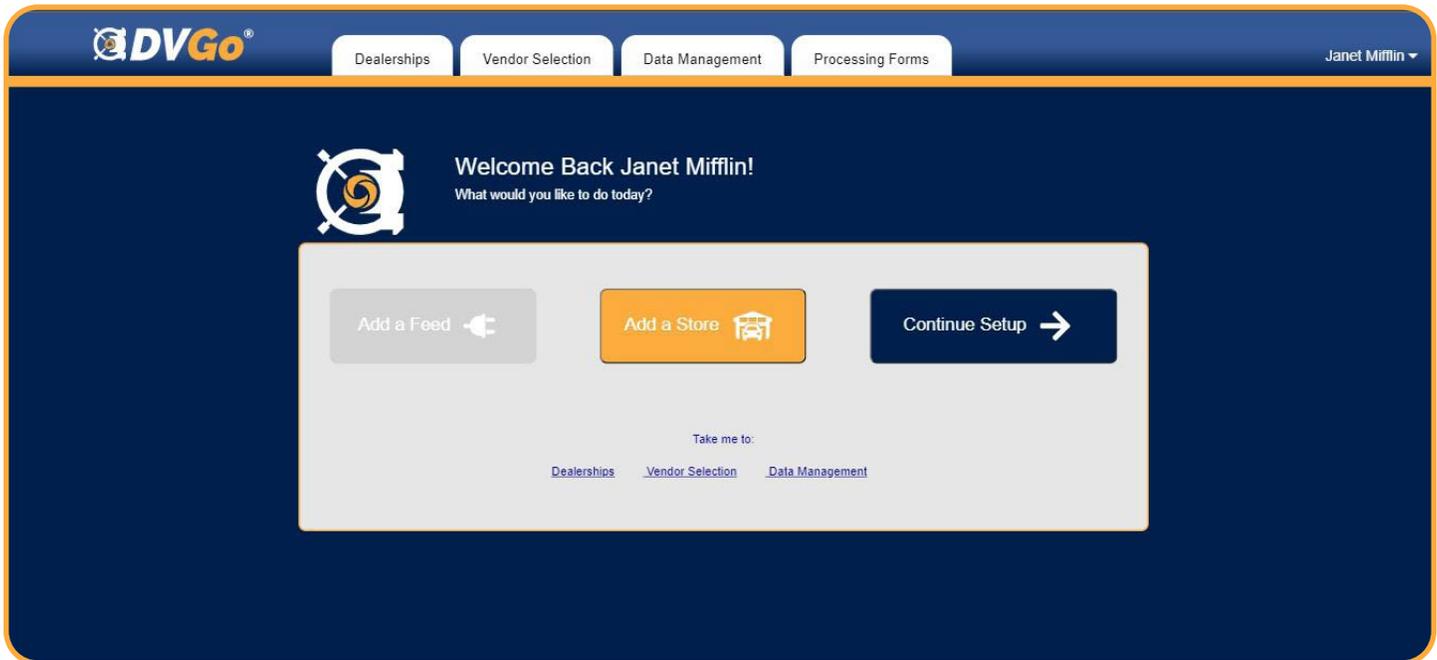


The +Add DMS/Data Source button will bring up a drop down menu with associated DMS connections. You can select and add as many sources as necessary per store.

**Finish/Submit**

Removes DMS/ Data Source from store listing. You will be asked to verify the action before removing the source from your store setup.

## WELCOME BACK TO



DVGo will help you set up extractions from your DMS by providing you the instructions and authorization forms needed to get your data flowing! Technical set up requirements, such as credentials or FTP connection settings, can also be managed on this tab. It is important to note that some of these processes can take time. If you need to log off to complete these steps, you can pick up where you left off the next time you sign in.

Add a Feed 

The +Add DMS/Data Source button will bring up a drop down menu with associated DMS connections. You can select and add as many sources as necessary per store.

Add a Store 

The +Add DMS/Data Source button will bring up a drop down menu with associated DMS connections. You can select and add as many sources as necessary per store.



- Dashboard
- Store Summary
- Group Management
- Data Management ▾
- Janet Mifflin ▾

-- Change Store -- ▾

## Primary Navigation



**Notification Center**  
Currently for expiring PAFs only



**Knowledge Hub**  
Tips, tricks, and information



**Logout**

**Dashboard** Login and have immediate focus on the action's that require your attention.

**Store Summary** View and/or edit feeds for a particular store.

**Group Management** View and/or edit feeds for all the stores in your group.

**Data Management**

- Data Opt-Out** Remove all customer and co-buyer information for state or individual opt-outs.

**Mapping** Allows you to customize field mappings based on the fields in your DMS.

*NOTE: "Mapping should only be edited by someone with experience."*

**User Options**

- User Management** Add users, manage permissions per store, assign roles, and reset passwords.  
*Group or Store Admins only.*

**Edit Profile** Edit your profile and contact information.

**Change Password** Change your personal user password.

**Logout** Logout ends your DealerVault session.

**Change Store** Change the active store being viewed.

## Dunder Mifflin Motor Group

### Dashboard

#### Feed Approvals Needed

**39**

Review Feeds

#### Connection Health



View Connections



#### Quick Links



Add a Store



Add a Feed



Contact Us

The first thing you'll see in the DealerVault Dealer portal is the dashboard. The dashboard gives you a quick look at all the actionable items that require attention. This easy access panel eliminates large volume of notifications headed to your inbox, making it easier for dealerships to get right to the task at hand, giving you more time to focus on your business.

### Feed Approvals Needed

**39**

Review Feeds

The +Add DMS/Data Source button will bring up a drop down menu with associated DMS connections. You can select and add as many sources as necessary per store.

### Connection Health



View Connections



The +Add DMS/Data Source button will bring up a drop down menu with associated DMS connections. You can select and add as many sources as necessary per store.

### Quick Links



Add a Store



Add a Feed



Contact Us

The +Add DMS/Data Source button will bring up a drop down menu with associated DMS connections. You can select and add as many sources as necessary per store.

## Add Feeds

Add Feed

### Select Vendor Program

Clicking the Add Feed button on the home page will bring you to the vendor program selection page. Find your vendor program by using the search index or by scrolling through the drop-down menu. Once you've found your vendor program, highlight it and click submit.

#### Mickey's Auto - Mickey's Mini's

##### Select Vendor

Premier Vendor Vendor not listed? [Add Vendor](#)

Show Premier Vendors Only

- Chopped Soup
- Windy City Promotions (Revenue Explosion, Windy Mallers)
- ABC Auto 123 Service (1, 2, New Program)
- Account Override Delegate (Program 1, Program 2, Program 3)
- Advent v2
- Clever Trever (All For One and One For All, The Big Gun)
- Cool Cars
- DealerTurn Delegate
- DealerVault FTP with folder

#### Mickey's Auto - Mickey's Mini's

##### Add Sample Test Delegate 2 Feed

[Change Vendor](#)

Active	Feed Description	Fields	Filters	Stores	Program
<input checked="" type="checkbox"/>	Appointments - Daily - No Historical	Fields	Filters	Stores	
<input checked="" type="checkbox"/>	Inventory - Daily - No Historical	Fields	Filters	Stores	
<input checked="" type="checkbox"/>	Open RO - Daily - No Historical	Fields	Filters	Stores	
<input checked="" type="checkbox"/>	Sales - Daily - 4 Years Historical	Fields	Filters	Stores	
<input checked="" type="checkbox"/>	Service - Daily - 4 Years Historical	Fields	Filters	Stores	

Submit

Cancel

### Select File Types

The next screen shows you what file types the vendor is looking for to fulfill the program. You'll see a Feed Description which tells you the file type, the frequency of the delivery, and how much historical data is needed. Select the file types you wish to activate and hit submit for default feed settings. If you do not want default settings, you can edit feeds down to field, filter, or store level.

### Select Vendor Program

Clicking the Add Feed button on the home page will bring you to the vendor program selection page. Find your vendor program by using the search index or by scrolling through the drop-down menu. Once you've found your vendor program, highlight it and click submit.

#### Authorization Form Required for Puerto Rico Auto Dealers

You requested to add a feed to a Vendor that runs NCOA processing on your data. In order to complete this request and return appended data, a Processing Acknowledgement form needs to be completed by all parties. Upon completion, we will inform you of the feed delivery.

Document Name	Dealership Name	Use the link below	Signature Verified
PAF Move18	Tom's Toyota Super Store	<a href="#">Sign Document</a>	

Done! Select Finish to send the completed document.

OTHER ACTIONS

999 3rd Ave, Suite 1700 • Seattle • Washington 98104 • (206) 219-0200

**UNITED STATES POSTAL SERVICE** NCOALink® PROCESSING ACKNOWLEDGEMENT FORM

The collection of information on this Processing Acknowledgement Form (PAF) is required by the Privacy Act of 1974. The United States Postal Service® (USPS) requires that each NCOA™ Licensee have a completed NCOA™ PAF for each of their NCOA™ customers prior to providing the NCOA™ service. The Licensee is also required by the USPS to retain a copy of the completed form for each of its customers and to obtain an updated PAF from each of its customers at minimum once per year. Any signature upon this PAF shall be considered valid for all purposes and have the same effect whether it is an ink-signed hardcopy document or equivalent alternative.

**LIST OWNER**

I, the undersigned, an authorized representative of:

Company Name:

Address:

City:  State:  ZIP+4:

Telephone Number:  FAX:  E-mail Address:

## Edit Feeds



You can edit Pending Activities or Completed Feeds at any time by clicking on the Edit (Pencil) Icon!

## Edit Fields

The Edit Fields icon gives you access to edit all aspects of your feed information for either your pending activities or current feeds. You will be brought to a field summary page where you can select which fields you want to include/exclude from that specific vendor's feed delivery.

Vehicle	VIN Explosion	Amounts	Miscellaneous	Standard
<input checked="" type="checkbox"/> Year	<input checked="" type="checkbox"/> Interior Color Code	<input checked="" type="checkbox"/> Accessory Code		
<input checked="" type="checkbox"/> Model Number	<input checked="" type="checkbox"/> Trim	<input checked="" type="checkbox"/> Accessory Description		
<input checked="" type="checkbox"/> Exterior Color	<input checked="" type="checkbox"/> Transmission	<input checked="" type="checkbox"/> Accessory Cost ▲		
<input checked="" type="checkbox"/> Stock Number	<input checked="" type="checkbox"/> Cylinder	<input checked="" type="checkbox"/> Accessory Retail ▲		
<input checked="" type="checkbox"/> Vehicle Type	<input checked="" type="checkbox"/> Weight	<input checked="" type="checkbox"/> Accessory Invoice ▲		
<input checked="" type="checkbox"/> Vehicle Status	<input checked="" type="checkbox"/> Description ▲	<input checked="" type="checkbox"/> Package Code ▲		
<input checked="" type="checkbox"/> Inventory Date	<input checked="" type="checkbox"/> Vehicle Style	<input checked="" type="checkbox"/> Location ▲		
<input checked="" type="checkbox"/> Purchase Date ▲	<input checked="" type="checkbox"/> Engine	<input checked="" type="checkbox"/> Certification		
<input checked="" type="checkbox"/> Sold Date ▲	<input checked="" type="checkbox"/> Fuel Type	<input checked="" type="checkbox"/> Certification Number ▲		
<input checked="" type="checkbox"/> VIN	<input checked="" type="checkbox"/> MPG	<input checked="" type="checkbox"/> Sales Code		
<input checked="" type="checkbox"/> Make	<input checked="" type="checkbox"/> Standard Equipment ▲	<input checked="" type="checkbox"/> Wholesale ▲		

## Edit Filters

Vendors occasionally provide filters for your feeds. The program may only want data for a specific make or request finalized sales only. The filters selected to apply to your feed ensure you're only sending the data necessary to fulfill your vendor's requirements.

**Test Vendor 12 Inventory Feed Details**

Fields | **Filters** | Stores | Delivery

**Vendor Filters**

Finalized sales only ⓘ

**Description:**  
Deal Status is I

**Formula:**  
[Deal Status] = 'I'

**Test Vendor 12 Inventory Feed Details**

Fields | Filters | **Stores** | Delivery

• Indicates Required Field

**Available Stores:**

Search

- Pluto Porsches
- Clarabelle's Chryslers
- Pete's Motors
- Jack's Jeeps

**Edit Feed for Stores:**

- Mickey's Minis
- Donald's Dodges

>

>

<

## Store Select

Save duplicated time and efforts by editing your feeds and applying the changes to multiple stores at one time. By clicking Stores on the file type screen, you can select which stores you wish to apply the feed to. This will request feeds and make changes to all stores selected for that particular vendor's file type.

### Pending Activities

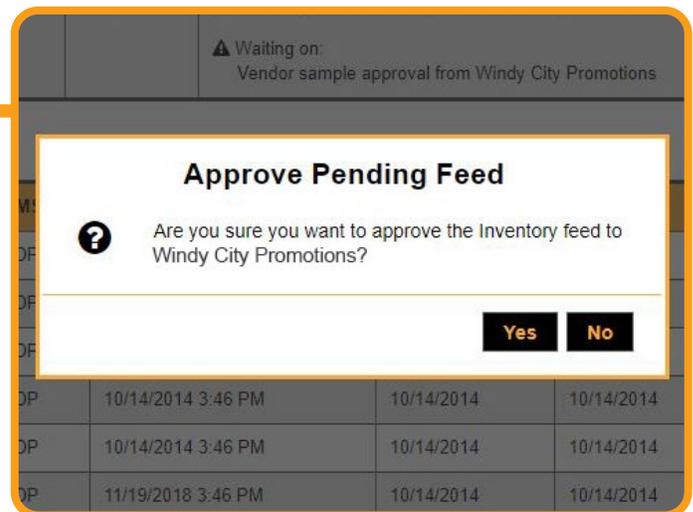
Vendor	Feed Type	Type	Notes	Action
My Whatever Delegate	Open RO	Delivery Setup	[11/07/2018] Jamie Theis requested Open RO feed to My Whatever Delegate [11/07/2018] Jamie Theis approved the feed	✓ ✎ 🗑
📍 Windy City Promotions	Inventory	Delivery Setup	[10/24/2018] Shi Zeng Her requested Inventory feed to Windy City Promotions [10/24/2018] Shi Zeng Her approved the sample file and feed  ⚠ Waiting on: Vendor Dealer ID from Windy City Promotions Vendor sample approval from Windy City Promotions	✓ ✎ 🗑

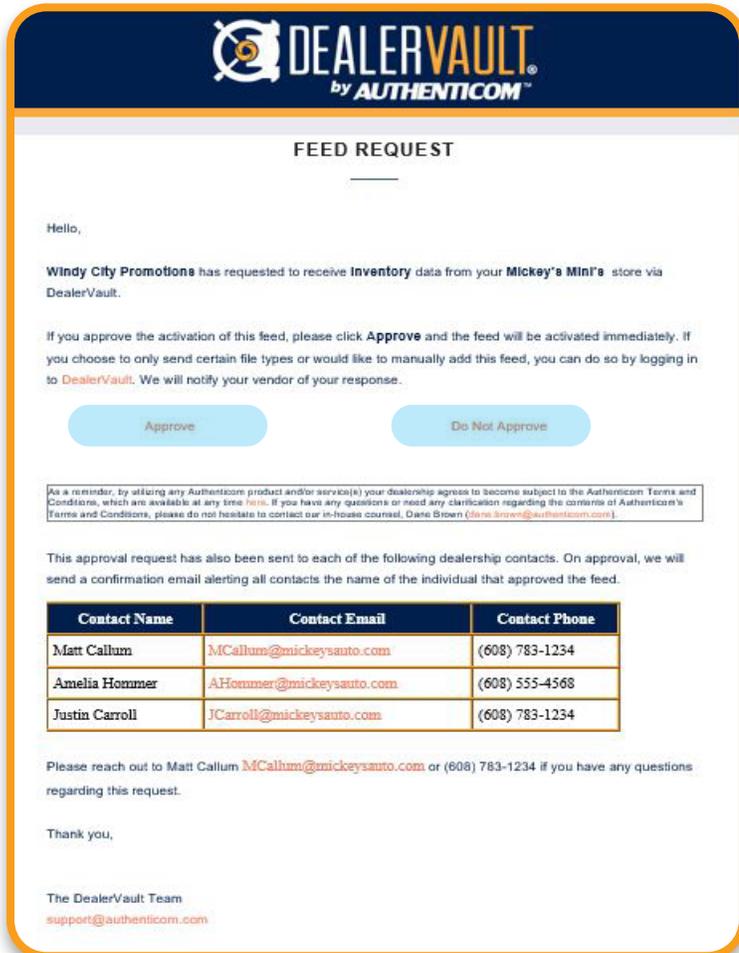
## Pending Activities

This section is a summary of all pending feed requests waiting for a call to action before feeds can be activated. Monitor the feed types you've recently requested or cancel the pending request by clicking on the trash icon. You can also edit that feed prior to approval by clicking on the pencil/edit icon. Change the fields that are sent, apply filters, and include data from multiple stores within your dealer group. Edit icon (pencil) explained on [page 7](#).

### ✓ Feed Approval Icon

Clicking the Feed Approval Icon will give the user the option of approving the feed. A confirmation window will pop up to ensure that the action isn't made in error. We record the approval information and send a notification to both the dealer and vendor contacts. Once the feed is approved, the feed will move to your completed feeds section. This will initiate data delivery to your vendor per the next designated delivery scheduled.





**FEED REQUEST**

Hello,

**Windy City Promotions** has requested to receive **Inventory** data from your **Mickey's Mini's** store via DealerVault.

If you approve the activation of this feed, please click **Approve** and the feed will be activated immediately. If you choose to only send certain file types or would like to manually add this feed, you can do so by logging in to DealerVault. We will notify your vendor of your response.

[Approve](#) [Do Not Approve](#)

As a reminder, by utilizing any Authenticom product and/or service(s) your dealership agrees to become subject to the Authenticom Terms and Conditions, which are available at any time [here](#). If you have any questions or need any clarification regarding the contents of Authenticom's Terms and Conditions, please do not hesitate to contact our in-house counsel, Diane Brown ([diane.brown@authenticom.com](mailto:diane.brown@authenticom.com)).

This approval request has also been sent to each of the following dealership contacts. On approval, we will send a confirmation email alerting all contacts the name of the individual that approved the feed.

Contact Name	Contact Email	Contact Phone
Matt Callum	<a href="mailto:MCallum@mickeysauto.com">MCallum@mickeysauto.com</a>	(608) 783-1234
Amelia Hommer	<a href="mailto:AHommer@mickeysauto.com">AHommer@mickeysauto.com</a>	(608) 555-4568
Justin Carroll	<a href="mailto:JCarroll@mickeysauto.com">JCarroll@mickeysauto.com</a>	(608) 783-1234

Please reach out to Matt Callum [MCallum@mickeysauto.com](mailto:MCallum@mickeysauto.com) or (608) 783-1234 if you have any questions regarding this request.

Thank you,

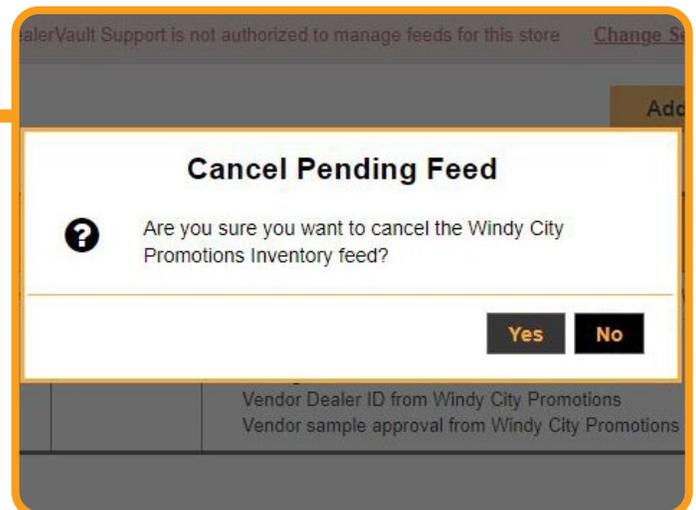
The DealerVault Team  
[support@authenticom.com](mailto:support@authenticom.com)

## ✓ Feed Approval Through Email

When a vendor requests a feed for your dealership and your dealership is already setup in the DealerVault system, we will send you a feed approval request. Dealers simply need to approve or decline the request to activate feeds. This notification includes approval links directly in the email and is sent to all DealerVault contacts we have on file for the location. As soon as someone from the dealership has made their selection, the feed will be activated or the request will be canceled. Vendors will receive a confirmation of this request with a list of the dealership contacts the notice was sent to for follow-up.

## Cancel Pending Feed

Clicking the Cancel Pending Feed (trash icon) will give the user the option of canceling the feed before the connection has been established. A confirmation window will pop up to ensure that cancellation isn't made in error. Clicking yes will remove all information regarding this feed from the DealerVault system. A new feed will have to be requested to replace it.



alerVault Support is not authorized to manage feeds for this store [Change St](#)

**Cancel Pending Feed**

**?** Are you sure you want to cancel the Windy City Promotions Inventory feed?

[Yes](#) [No](#)

Vendor Dealer ID from Windy City Promotions  
Vendor sample approval from Windy City Promotions

**Current Feeds**
  Show Deactivated Feeds

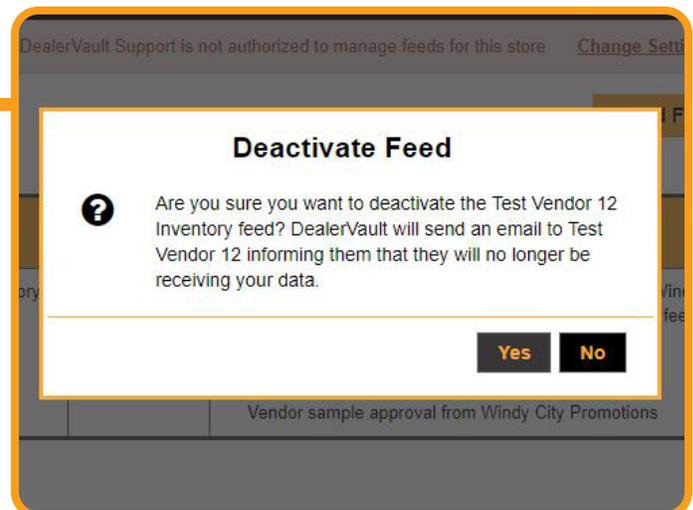
Vendor	Feed Type	Schedule	First Delivery	Last Delivery	Record Count	Action
My Whatever Delegate	Service	Daily at 12:00 AM				 
 Test Vendor 12	Inventory	Daily at 1:15 AM				 
Vendor With Images	Inventory	Daily at 12:00 PM	08/22/2018 5:01 PM	08/23/2018 2:38 PM	279	 
Vendor Without Images	Inventory	Daily at 12:00 PM	08/22/2018 5:01 PM	08/23/2018 2:37 PM	279	 

## Current Feeds

This section allows you to monitor all of your approved feeds for your store. Completed feeds are separated by Vendor and Feed Type. DealerVault allows you to monitor and track how frequently your vendors are getting your data including the first and last time we delivered data to your vendor and how many records were sent in that delivery. Dealers always have the control to edit their feeds and can even deactivate or reactivate feeds to control the flow of data to their vendors. Click [Show Deactivated Feeds\\*](#) to add deactivated feeds to your list view. Edits made to current feeds will be applied to the next scheduled delivery. The Edit Feed icon (pencil) is explained on [page 7](#).

## Feed Activation Toggle

Control whether or not your feeds are actively delivering to your vendor. A confirmation window will pop up to ensure that deactivation isn't made in error, and a notification will be sent to your vendor letting them know they will no longer be receiving your data. Click [Show Deactivated Feeds\\*](#) to see your deactivated listings in the completed feeds section. Click the red toggle on a deactivated feed to reactivate the feed and resume sending data after vendor approval. **Note: You cannot reactivate a feed if data is lagging over 30 days.**



### Data Content Summary

Data Type	DMS	Last Polled	Data Start	Data End	Key Date
Service	Autosoft	04/16/2015 10:50 AM	03/16/2015	04/15/2015	Close Date
Sales	DealerTrack	04/17/2015 10:49 AM	03/17/2015	04/17/2015	Contract Date
Open RO	DealerTrack	04/21/2015 1:44 PM	03/26/2015	04/21/2015	Open Date
Appointments	M&M	04/16/2015 12:30 PM			Appointment Date
Inventory 	CarPod	04/16/2015 12:29 PM			N/A

## Data Content Summary

This section lists all the available data types that you have active in DealerVault. Having all available file type connections established simplifies the activation of feeds to current and future vendors. The second column shows the DMS system we receive your data from. Last Polled shows the date and time we last received your data. Data Start and Data End show the range of data that we have on file. If a vendor requires a historical file for their program, we'll check to see if we have enough of your data stored in our system to fulfill that request. Key Date shows what date the file type uses to indicate the generation of a new record.

**NOTE:** If data is not current, it is considered **lagging**. We will either request you push a file, or that we receive a new file from your DMS provider.

**Authorized**

✓ DealerVault Support can make changes for this store upon request [Change Settings](#)

**Not Authorized**

⚠ DealerVault Support cannot make changes for this store [Change Settings](#)

## Authorization Bar

Under the store name, you'll notice either a green or red bar which tells you whether or not you've authorized DealerVault support to assist managing your feeds. Authorized or not, no change will ever be made to your account without your approval. If the bar is green, DealerVault Support can manage your feeds on your behalf. If the bar is red, you've chosen to manage your feeds without support assistance. You can change authorization permissions by clicking on the [Change Settings](#) link.

## Mickey's Dealership Group - Mickey's Minis

### Reports

1. Vendor Name:  2. Feed Type:  3. Begin Date:  4. End Date:

Exported File	Delivery Type	Delivery Date	Poll Date	Record Count
<a href="#">123DVD12345_20181115_0233_SL.txt</a>	Regular	11/15/2018 2:34 AM	11/14/2018 9:17 PM	3
<a href="#">123DVD12345_20181114_0233_SL.txt</a>	Regular	11/14/2018 2:34 AM	11/13/2018 9:17 PM	3
<a href="#">123DVD12345_20181113_0233_SL.txt</a>	Regular	11/13/2018 2:33 AM	11/12/2018 9:15 PM	4

## View Reports

DealerVault's Reporting feature enables you to track all of your vendor deliveries back 90 days. You can download and view the exact file that was sent to your vendor. If there are any discrepancies, you can easily find and verify what your vendor received using the DealerVault reporting feature.

Click View Reports on the home screen to go to the Reports page. Use the drop-down menus to choose the Vendor Name and Feed Type you wish to view. Set the date range and click **Get Report** to generate a list of reports. Simply double click on the link in the exported file column to open and view the report.

**NOTE:** The date range is set at a default of one month. To extend the date range click **Begin Date** and select up to 90 days worth of reporting history. **End date** is preset to the current date.

## Mickey's Auto Group

### Group Management

⚠ DealerVault Support is not authorized to manage feeds for all stores [Change Settings](#)

Show Premier Vendors Only  Show Deactivated Feeds ?

Store Name ▲	Vendor ▲	Feed Type ▲	Feed Status ⇅	DMS ⇅	First Delivery ⇅	Last Polled ⇅	Last Delivery ⇅	Record Count ⇅	Action ⇅
Otto's Autos	Pat's Program	Sales	Complete	ABC	04/13/2018	02/15/2018 12:26 PM	04/13/2018 2:12 AM	89	
Otto's Autos	Pat's Program	Service	Complete	ABC	04/13/2018	02/15/2018 12:55 PM	04/13/2018 2:12 AM	684	
Mickey's Minis	Mark's Marketing Program	Service	Complete	ABC	01/01/2018	01/30/2018 5:37 PM	11/15/2018 1:01 AM		
David's Dodges	Roy's ROI Program	Sales	Complete	ABC	03/29/2018	11/16/2018 12:45 AM	11/16/2018 1:48 AM	2	
David's Dodges	Roy's ROI Program	Service	Complete	ABC	03/29/2018	11/16/2018 12:59 AM	11/16/2018 1:47 AM	31	
	Mark's			ABC	03/29/2018	11/16/2018	11/15/2018		

## Group Management Page

Group Management gives you a snapshot of your entire DealerVault account. Use Group Management to view and take action on all of your feeds across multiple stores. Monitor which feeds you have active, deactivated, the last time data was delivered, and much more!

Use the search bar to narrow your search to a specific store or vendor. It's a powerful tool that indexes every column shown excluding the actions. Click a header to sort on that column in the table. Hold the shift key and click an additional column header to sort on multiple columns.

**Export to CSV**

Export an entire summary of your account direct to your browser's download folder for offline viewing!

### Edit Global Mapping for Address Line 1

Vendor

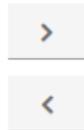
N/A

Move fields into the Used Fields list to build the DealerVault delivery field available for your Vendors. To use multiple fields you will need to identify the order of precedence of the fields as well as the aggregation method DealerVault should use.

#### Available Fields

Search

- ADDRESS2
- APPT-DATE
- APPT-TIME
- APPT.ID
- BIRTH-DATE
- BLOCK.DATA.SHARE
- BLOCK.EMAIL
- BLOCK.MAIL
- BLOCK.PHONE
- CASS STD CART



#### Used Fields

1 ADDRESS



#### Aggregation Type

- None
- First Non-blank 
- Concatenate 
- Formula 

#### Preview

ADDRESS

**Submit** **Cancel**

## Mapping

The Mapping section provides visibility into which DMS fields are being used for each delivery field. You have the ability to edit the mapping of a delivery field to a specific field of your choice from your DMS. Your current DMS fields will be listed under “Available Fields”. Mappings are available for each file type you have setup on DealerVault.

DealerVault wishes to express that mapping gets very technical and “should only” be edited by someone with DMS mapping experience.

# Data Opt-Out

Opt-Out +

- Data Management ▾
- Data Opt-Out
- Mapping

DealerVault now provides you with the ability to manage data share preferences for your customers. After selecting Data Opt-Out from the drop down menu, you have the option of State Consumer Opt-Out or Individual Consumer Opt-Out.

**Important Note:** Even if the customers are opted out in your DMS, all requests will need to be applied via the Data Opt-Out tool to ensure removal of customer data from future deliveries.

State Opt-Out

Customer data from the state and dealership(s) selected will be excluded prior to next delivery.

Select available State California ▾

<input type="checkbox"/>	Dealership Name
<input type="checkbox"/>	Cargill Chevrolet Buick GMC Inc.
<input type="checkbox"/>	Dwight's Dodges and Used Car Emporium
<input type="checkbox"/>	Jim's Jeeps and Repair
<input type="checkbox"/>	Dunder Mifflin Motors

Submit
Cancel

## State Consumer Opt-Out

The State Consumer Opt-Out selection removes all residential customer and co-buyer data for the selected state prior to the next data delivery to your vendor partners. Each store selected will have this feature applied. Once it is set, it is actively removing all customer and co-buyer information for the states selected from all future vendor deliveries.

## Individual Consumer Opt-Out

The Individual Consumer Opt-Out selection will prompt you to enter customer information to be added to a master list of removed customers for that specific store. You will be asked to confirm the customer's identity after clicking submit to verify the correct data is being withheld from your vendor partner on future deliveries.

Individual Consumer Opt-Out

Dealership Name Cargill Chevrolet Buick GMC Inc. ▾

Customer Address \* 465 Hathaway Rd.

Full Name \* Jim Davis

City \* Sherman

Email Address GarfieldLives2020@

State CA

Customer # 042591

Opt-Out Individual Consumer

<input type="checkbox"/>	Customer #	Name	Address	Email	Phone	Dealership Name
<input checked="" type="checkbox"/>	042591	Jim Davis	465 Hathaway Rd.	GarfieldLives2020@softkitty.com	920-415-2961	Cargill Chevrolet Buick GMC Inc.

Confirm
Cancel

## Data Opt-Out

### State Consumer Opt-Out

Opt-Out +

Dealership Name	Address	State	Opt-Out Date	Action
Cargill Chevrolet Buick GMC Inc.	1225 N Main St	CA	11/26/2019 6:18:52 PM	

Showing 1 to 1 of 1 entries

### Individual Consumer Opt-Out

Opt-Out +

Customer#	Dealership Name	Name	Address	Email	Phone	Opt-Out Date	Opt-Out Reason	Action
68424	Cargill Chevrolet Buick GMC Inc.	Kelsey Grammar	1 PREMIER CT	KGrammar@NOTREAL.COM	(516) 361-2771	11/25/2019 3:47:17 PM	Individual	
97339	Cargill Chevrolet Buick GMC Inc.	Chelsey Handler	25 WHITNEY GATE	CHandler@SHOWONNFLx.COM	(631) 678-2431	11/20/2019 4:56:07 PM	State	

## Opt-Out Summary Page

This master list provides you the visibility you need to verify your customer's data has been removed from future vendor deliveries. The Opt-Out Reason column will populate with "Individual" or "State" based on the

**NOTE: Individual Opt-Out requests override State Opt-Out requests. If the State Consumer Opt-Out is ever removed, the Individual Consumer Opt-Out remains intact.**



### Trash Icon

You can opt-in a consumer or state at any time by clicking the trash can icon.



### Disclaimer:

The Data Opt-Out tool manages opt-out requests, but does not ensure compliance. For more information on CCPA & other data laws, please consult your legal counsel.

## Mickey's Auto Group - Mickey's Minis

### User Management

 Show Disabled Users

Name	Email Address	Phone	Admin	Roles	Last Login	Action
Abe Anderson	<a href="mailto:abe.anderson@mickeys.com">abe.anderson@mickeys.com</a>	(608) 793-5596	Group	Default		
Bonny Bennett	<a href="mailto:bonny.bennett@mickeys.com">bonny.bennett@mickeys.com</a>	(050) 308-0503	Group	Approves Feeds	11/12/2018 4:38:46 PM	
Carl Carson	<a href="mailto:carl.carson@mickeys.com">carl.carson@mickeys.com</a>	(866) 289-3283	Group	Approves Feeds	11/12/2018 2:12:33 PM	
Daisy Dugget	<a href="mailto:daisy.dugget@mickeys.com">daisy.dugget@mickeys.com</a>	(608) 793-1389	Group	Default		
Ellie Engelson	<a href="mailto:ellie.engelson@mickeys.com">ellie.engelson@mickeys.com</a>	(888) 123-4567	Group	Approves Feeds	8/3/2018 4:30:37 PM	
Frank Franzen	<a href="mailto:frank.franzen@mickeys.com">frank.franzen@mickeys.com</a>	(608) 790-1200	Group	Default	11/16/2018 3:24:27 PM	
Gary Grayson	<a href="mailto:gary.grayson@mickeys.com">gary.grayson@mickeys.com</a>	(608) 123-4567	Group	Approves Feeds		
Harold Hanson	<a href="mailto:harold.hanson@mickeys.com">harold.hanson@mickeys.com</a>	(123) 456-7890	Group	Default		
Izzy Inland	<a href="mailto:izzy.inland@mickeys.com">izzy.inland@mickeys.com</a>	(608) 796-1167	Group	Approves Feeds	11/15/2018 2:42:07 PM	

Add User

## User Management Page

User management is available for DealerVault Group and Store Administrators. This page serves many functions when it comes to managing your team's permissions and contact information. Here you can manage the roles of users if you have specific personnel who should receive approval notifications or have everyone defaulted for all notifications. This page is also used to make sure that all user contact information is current.

You can modify user permissions to your highest tier of access. This page also helps you assist your team with password access should someone forget or have difficulty logging in. You can also disable a user's access to keep up with changes in your organization.

## Edit Profile



The pencil icon means edit throughout DealerVault, and in this instance, you've been given access to edit all aspects of your user's information. Update your contact information, modify role assignments, and regulate the user's store or group level permissions. Click submit and your changes are saved to the user profile.

**Edit Profile** \* Indicates Required Field

Email Address:

• Full Name:

• Phone Number (digits only):

• Role:  ⓘ  
\*Selecting default will reset all roles

Group Admin

Group Admins have admin rights and access to all stores

## Disable/ Enable User



Clicking on this toggle will either enable an old user's permissions or disable the current user. If the toggle is green, the user is active. If it's grayed out, the user is disabled. When disabling a user, there will be a confirmation box for this action to ensure this change was not made in error. A notification will generate to all store and group administrators.

**Disable User**

❓ This action will generate a notification to the group and store administrators. Are you sure you want to disable the account for Abe Anderson?

If so, please select the reason for disabling this account:

## Change Password



Clicking on the Reset Password (key) icon will generate a password reset link and send it to the user's inbox. The link provided in the email will reroute them back to the portal where they can change/update their new password.

**Password Reset Request**

Please confirm you wish to request a password reset?

### Add User

• Indicates Required Field

• Email Address:

• Confirm Email Address:

• Full Name:

• Phone Number (digits only):

Role:  
Approves Feeds ⓘ

Group Admin

Store Name	Store Access	Store Admin
Otto's Autos	<input type="checkbox"/>	<input type="checkbox"/>
Mickey's Minis	<input type="checkbox"/>	<input type="checkbox"/>

## Add User / Role Definitions

Enter the user contact information requested by the form and choose their role. If a user has an Approves Feeds role, only this user will receive feed approval notifications. Default users receive all notifications regarding the account unless there is a designated Approves Feeds user for the store/group, in which case Default users will not receive approval notifications.

### Group Admin

Group-Level administrative permissions. Group admins can add or disable users, change user permissions, add/edit/and deactivate feeds for all stores, and can determine which stores the other DealerVault users have access to.

### Store Access

Allows the user access to store functions, such as adding and deactivating feeds, but does not permit access to add or modify users.

### Store Admin

A hybrid of store access and group admin. Store admin has all the function of store access, but also has administrative permissions similar to group admin. The difference is store admin only has access to certain stores, rather than your entire dealership group.