



DEALER PORTAL ACCESS

Seller Information	
Dealer Name:	Dealer Email:
Phone:	Dealer#:
Agent:	Agent Email:
Agent Cell:	Agent#:

Seller Personnel		
POSITION	NAME	EMAIL
Owner/Principal:		
GM:		
F&I:		
F&I:		
F&I:		
F&I:		
Office Mgr:		
Office Personnel:		
Office Personnel:		
Service Contact:		



DEALER PORTAL ACCESS ROLES

Category	Rule	Contract View Only	F&I	Office Staff	Owner	Service
Contracts	Can Look Up, View and Regenerate Contracts	x	x	x	x	x
	Can View Contracts, Lienholder, Billing Status, Open Cancellation Quote		x	x	x	
	Can View Cancellation Refund Totals On Cancel Quote		x	x	x	
	Can VOID Pending Contracts		x	x	x	
Contract Quotes	Can View, Add and Submit Contracts Can Edit Retail and Discount Retail Down To Remit, Advanced Mark Up and Base Mark Up		x	x	x	
	Can Discount Retail Down To Remit, Below Remit and Override Retail Price Limits				x	
Remittance	Can View and Submit Contract Remittance Can View Dealer Reports On Website			x	x	
Settings	Can View F&I Markup Settings		x		x	
	Can View and Edit Base Markup and F&I Markup				x	
	Can View Retail Price Limits				x	
	Can View and Edit Retail Price Limits		x		x	
	Can Edit Contract Quote Templates		x	x	x	