GM DTAP/DCDE User Reference Guide

VinSolutions Connect CRM

Introduction

VinSolutions is partnering with General Motors to help GM Dealers improve the sales experience by enabling dealers to quickly access data offered directly from General Motors in VIN CONNECT.

The Dealer Customer Data Exchange (DCDE) program, commonly referred to as DTAP (Dealer Technical Assistance Program), provides participating dealers with enhanced information about General Motors customers. This information, from GM and made available in Connect, includes customer information, repair history, Reward Card status, Incentives, Invoices, Vehicle Location services and access to GM Drive Growth information. *NOTE: There are no personnel access restrictions available for this information. All Managers, Sales Persons', etc., will be able to view this information.*

This document contains information on how to enroll in the DCDE program and instructions for accessing the information in VinSolutions CRM, Connect.

GM DCDE– Feature Listing

Table of Contents

Enrollment Instructions

The following pages describe the process for enrolling your dealership in this program. This will allow you obtain access to DTAP Premium Features.

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DCDE Enrollment Instructions

If you are interested in participating in this free program, you first need to complete two agreements located on GM's Global Connect website. The procedures for completing these forms are listed below. Once you have completed and signed the online forms, please send an email informing us that you have completed the process to (vin.support@coxautoinc.com).

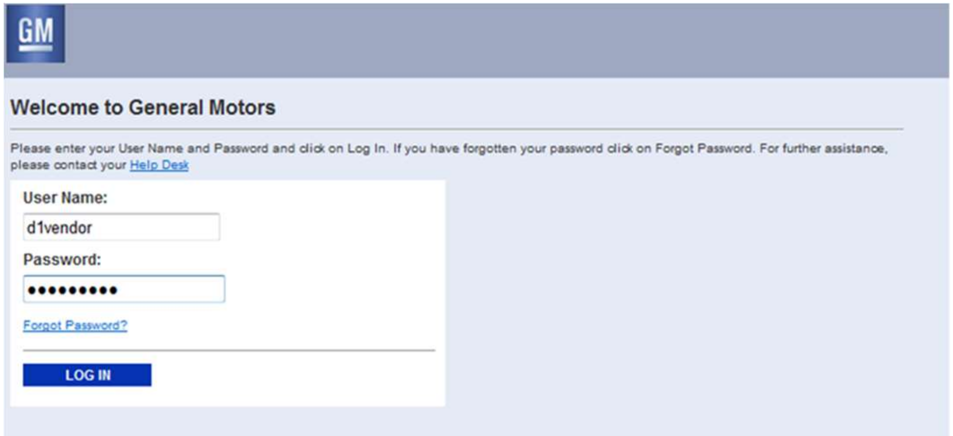
To ensure accuracy, PLEASE INCLUDE THE FOLLOWING INFORMATION:

- CONTACT NAME, CONTACT EMAIL
- CONTACT PHONE NUMBER
- VIN DEALER ID NUMBER
- BAC CODE

Upon receipt of your notice, we will work with GM to complete the enrollment process. Please note that this process can take up to 30 days. We will notify you when the DCDE services have been enabled for your dealership.

Step 1 - Navigate to: Global Connect

Step 2 - Enter **User Name** and **Password** and select "**LOG IN**".



Enrollment Instructions – Forms Completion

Step 3 – Dealer Completes online forms:

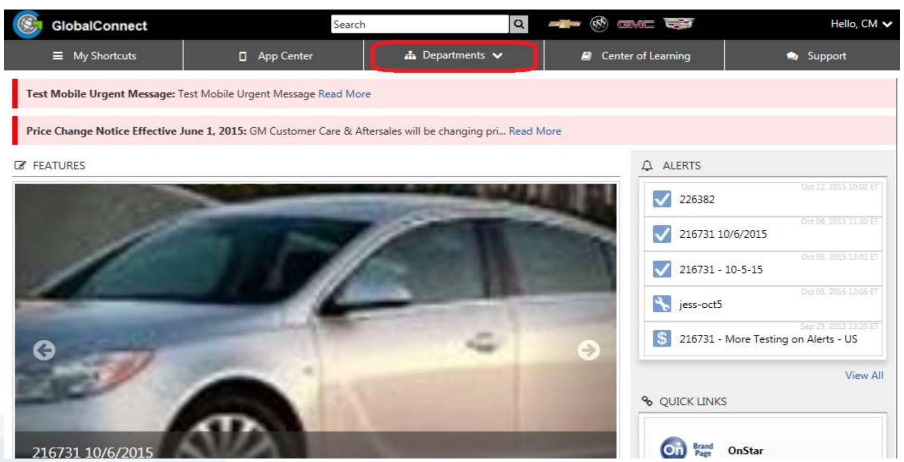
NOTE: The dealership user accessing and updating the enrollment forms must be assigned the “Dealer Principle” or “Executive Manager” role within VSP to access and update the Online Enrollment Forms. If there are questions on who at the dealership are assigned these roles, identify and contact the Partner Security Coordinator (PSC) for the dealership to identify the person who has these roles and can make needed changes.

A. Vendor Selection Form (Formerly the Third Party Data Sharing Agreement)

B. Dealer Data Share Participation Agreement

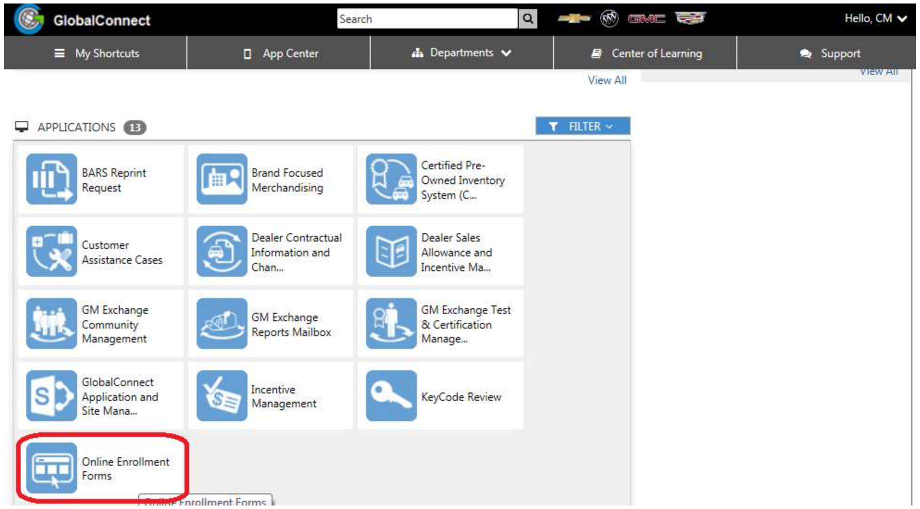
NOTICE: Although you may have previously completed these forms, they have changed and must be updated before the enrollment process can be completed.

Step 3. - From the landing page navigate to the center tab on the page, select Departments then select “Business Office” from the drop list.



Enrollment Instructions – Forms Completion

A listing of Business Office applications appears.



If dealership user is unable to see Online Enrollment Forms icon: The dealership user trying to access and update enrollment forms **must** be assigned the "**Dealer Principle**" role or "**Executive Manager**" roles within VSP to see and access and update the Online Enrollment Forms. If unable to see the forms icon, please identify and contact the Partner Security Coordinator (PSC) for the dealership to identify the person who has these roles assigned. Then work with users that have access to make needed enrollment form changes indicated in the steps below.

Step 3.1 - On the Business Office Page find and select "**Online Enrollment Forms**" icon.

Step 3.2 - On the Online Enrollment forms page select the "**Vendor Selection Form**" link.

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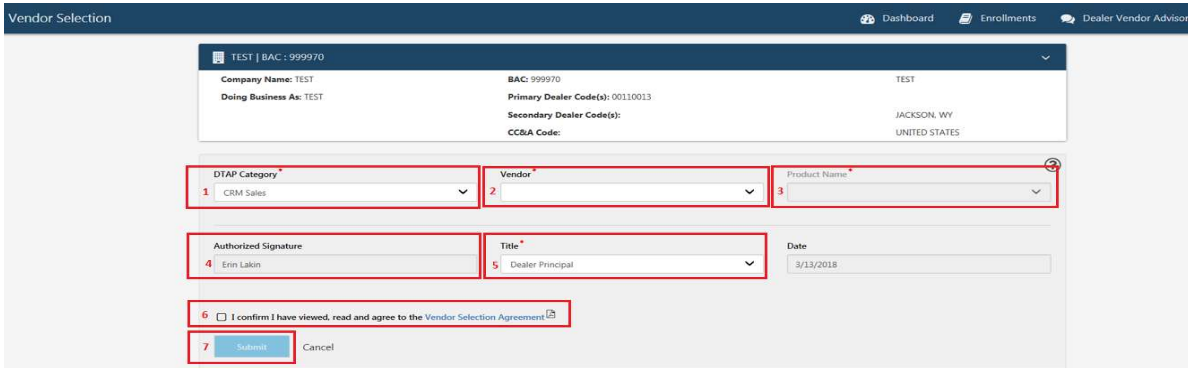
Enrollment Instructions – Forms Completion

Step 3.3 - On the Vendor Selection Form the enter relevant information as illustrated below, then select "Submit".



To complete setup for this Dealer CRM Leads integration, both CRM Sales and CRM Service DTAP Categories must be set for the dealership.

NOTE: If Both DTAP CRM Sales, and CRM Service is set and is accurate for the dealer from previous updates, no action is required by the dealer. If only one category is set and accurate, then setup for the other category will still need to be completed.

1. Select and set the DTAP Category for CRM Sales or CRM Service that your dealership uses. If the dealer has not set either CRM Sales, or CRM Service categories, then the dealer will need to repeat the steps listed in this section to set both (perform 2 submissions). Example: First select and set "CRM Sales" and then repeat the same steps for "CRM Service".

2. After selecting the DTAP category, select your vendor's name of which you are doing business with from the Vendor drop down list.

3. Select the DSP Product Name from the Product Name drop down list.

4. Authorized Signature is pre-populated based on your login.

5. Select your Title from the drop-list.

6. Review the Vendor Selection Agreement, then Check the "Agreement Acknowledged" box.

7. Click on the "Submit" button.

8. **Repeat as necessary to complete for both CRM Sales and CRM Service.**

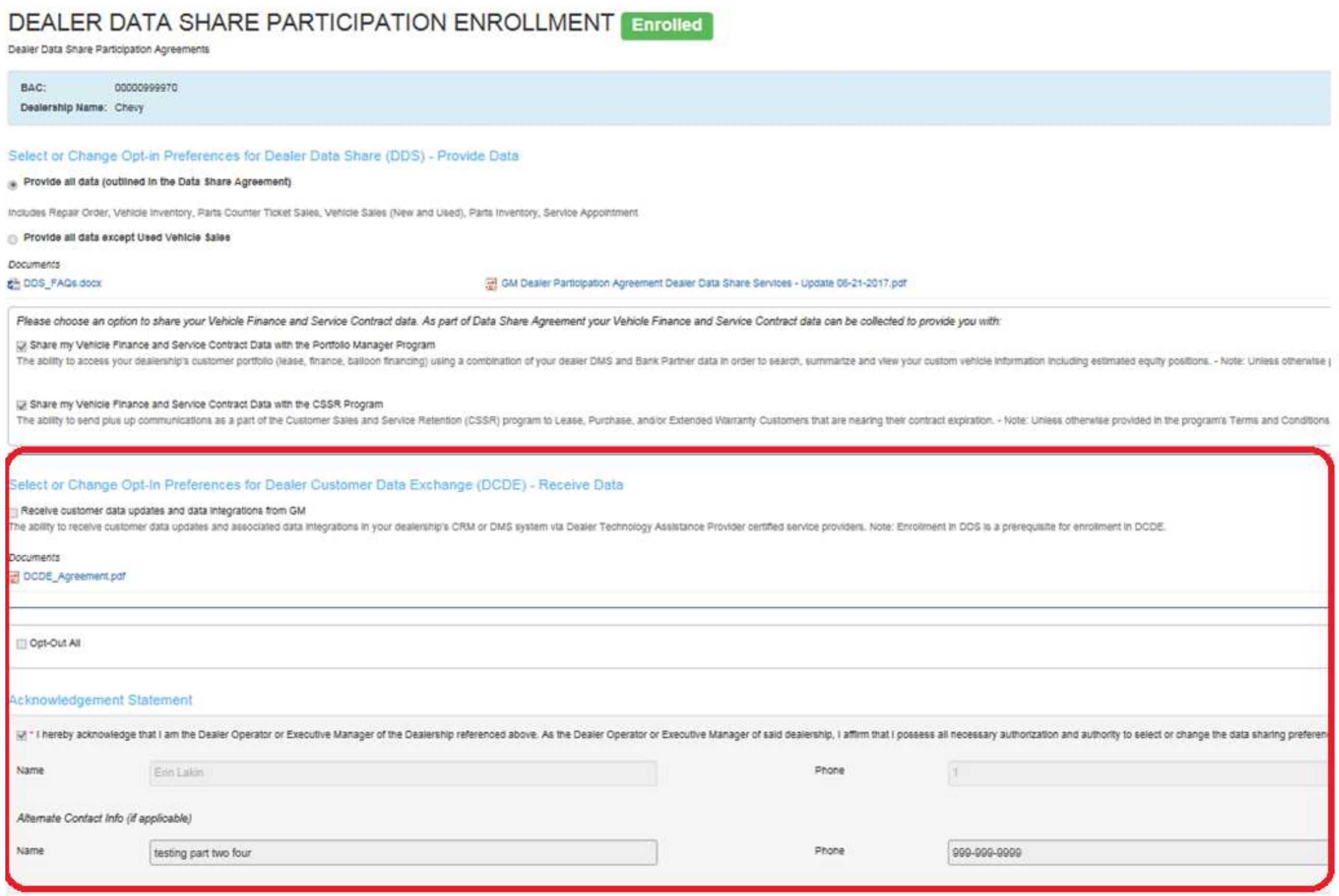
Enrollment Instructions – Forms Completion

Step 3.4 - Navigate back to the Online Enrollment forms page, and select "**Dealer Data Share Participation Agreements**" link.

Step 3.5 – If you have **NOT** already Enrolled your dealership in Dealer Customer Exchange Program, follow the steps indicated below to enroll. To determine if you are enrolled open the form to check your dealerships status.

Enrollment Instructions – Forms Completion

If NOT enrolled: There will be **no check mark** next to "**Receive customer data updates . . .**" on the **Dealer Data Share Participation Enrollment form.** To Enroll enter relevant information in the middle section of the form (See steps and close-up below), then click the "**Save**" button.


DEALER DATA SHARE PARTICIPATION ENROLLMENT Enrolled

Dealer Data Share Participation Agreements

BAC: 0000099970

Dealership Name: Chevy

Select or Change Opt-in Preferences for Dealer Data Share (DDS) - Provide Data

Provide all data (outlined in the Data Share Agreement)

Includes Repair Order, Vehicle Inventory, Parts Counter Ticket Sales, Vehicle Sales (New and Used), Parts Inventory, Service Appointment

Provide all data except Used Vehicle Sales

Documents

DDS_FAQs.docx

GM Dealer Participation Agreement Dealer Data Share Services - Update 06-21-2017.pdf

Please choose an option to share your Vehicle Finance and Service Contract data. As part of Data Share Agreement your Vehicle Finance and Service Contract data can be collected to provide you with:

Share my Vehicle Finance and Service Contract Data with the Portfolio Manager Program

The ability to access your dealership's customer portfolio (lease, finance, balloon financing) using a combination of your dealer DMS and Bank Partner data in order to search, summarize and view your custom vehicle information including estimated equity positions. - Note: Unless otherwise

Share my Vehicle Finance and Service Contract Data with the CSSR Program

The ability to send plus up communications as a part of the Customer Sales and Service Retention (CSSR) program to Lease, Purchase, and/or Extended Warranty Customers that are nearing their contract expiration. - Note: Unless otherwise provided in the program's Terms and Conditions

Select or Change Opt-In Preferences for Dealer Customer Data Exchange (DCDE) - Receive Data

Receive customer data updates and data integrations from GM

The ability to receive customer data updates and associated data integrations in your dealership's CRM or DMS system via Dealer Technology Assistance Provider certified service providers. Note: Enrollment in DDS is a prerequisite for enrollment in DCDE.

Documents

DCDE_Agreement.pdf

Opt-Out All

Acknowledgement Statement

* I hereby acknowledge that I am the Dealer Operator or Executive Manager of the Dealership referenced above. As the Dealer Operator or Executive Manager of said dealership, I affirm that I possess all necessary authorization and authority to select or change the data sharing preferen

Name: Erin Lakin

Phone: 1

Alternate Contact Info (if applicable)

Name: testing part two four

Phone: 999-999-9999

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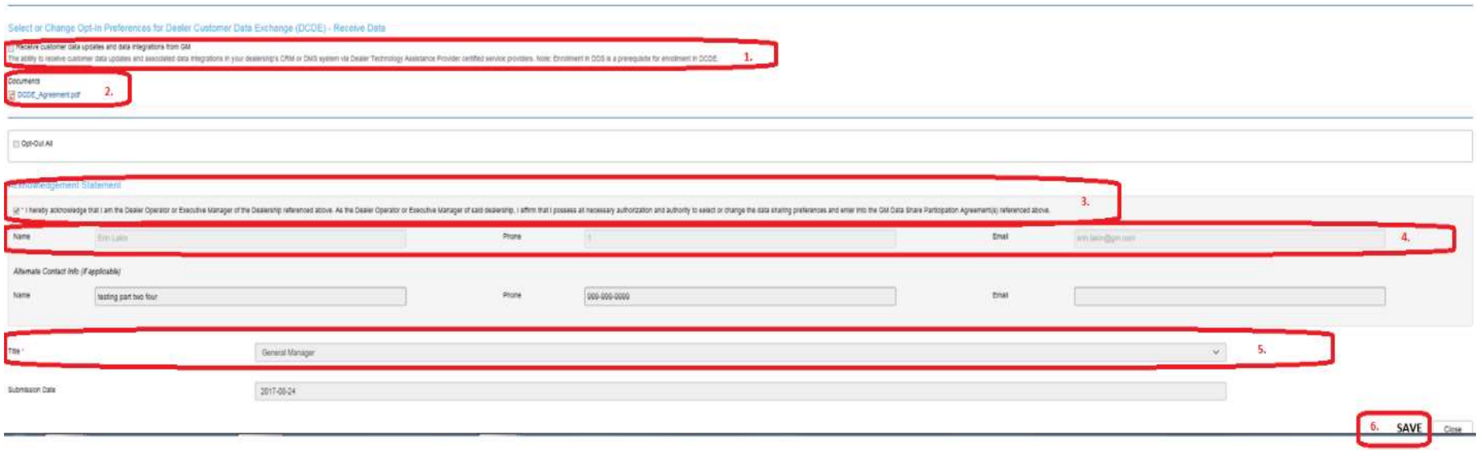
Enrollment Instructions – Forms Completion

Below is a close-up view of the specific section highlighting the steps to update the form and to enroll:



In the Select Change Opt-In Preferences for Dealer Customer Data Exchange (DCDE) – Receive Data section.

1. In the "**Select or Change Opt-In Preferences . . .**" section **check the box** next to "**Receive customer data updates and data integrations from GM**"

2. View DCDE Agreement PDF under the "**Documents**" section of enrollment form.

3. After reviewing the DCDE Agreement PDF, in the "**Acknowledgment Statement**" section of the form, **Check the box** next to "* **I hereby acknowledge . . .**" statement.

4. Confirm name of user modifying form (The name is pre-populated by form). Enter Phone and Email as needed into form.

5. Select the appropriate title of the person modifying the form from the "**Title** *" menu drop down.

6. Click the Save button.

7. You are now enrolled DCDE to receive customer data from GM!

Enrollment Instructions – Forms Completion

Step 3.6 – Your Dealership Online Enrollment Forms have been completed! Notify VinSolutions via email at vin.support@coxautoinc.com that you have completed the online enrollment forms.

To ensure accuracy, PLEASE INCLUDE THE FOLLOWING INFORMATION:

- CONTACT NAME, CONTACT EMAIL
- CONTACT PHONE NUMBER
- VIN DEALER ID NUMBER
- BAC CODE

Once we receive your email confirming the completion of the online forms, VinSolutions will work with GM to complete the enrollment process. Upon receiving confirmation from GM (up to 30 days) your dealership has been authorized to participate in the DCDE program, VinSolutions will enable the service in Connect and notify you via email. Instructions that provide an overview of DCDE functionality in Connect will also be provided.

Connect User Guide

The following pages provide instructions for accessing the information provided by the GM DCDE programs in Connect.

This information includes customer information, repair history, Incentives, GM Reward Card status, Invoices, Vehicle Location services and GM Drive Growth information.

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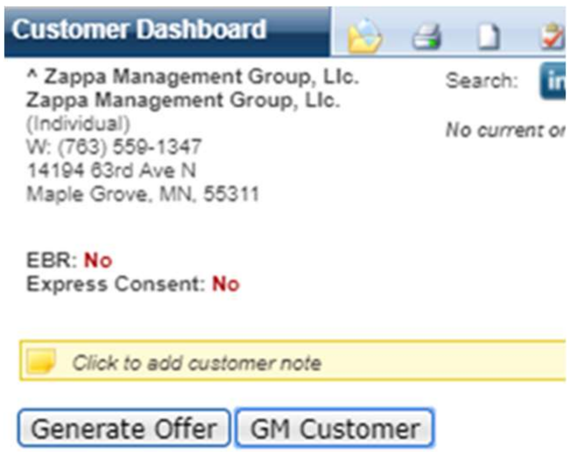
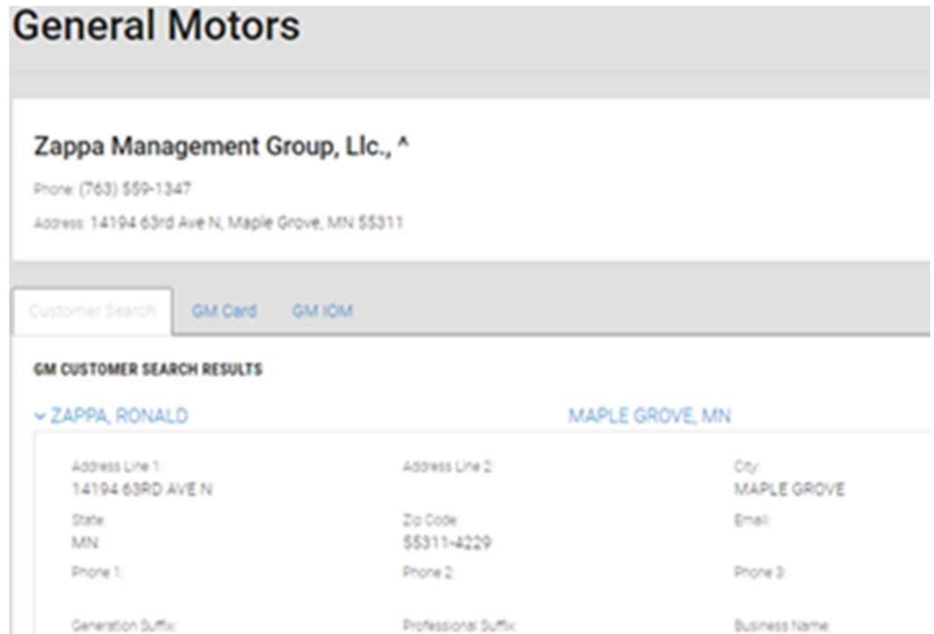
Customer, GM Card and Incentives

Customer Information, GM Card Status and Vehicle Incentives (GM IOM) can all be found by selecting the GM Customer button on the Customer's Dashboard:

Go to the Customer's Dashboard and select GM Customer.



You will be taken to this screen:

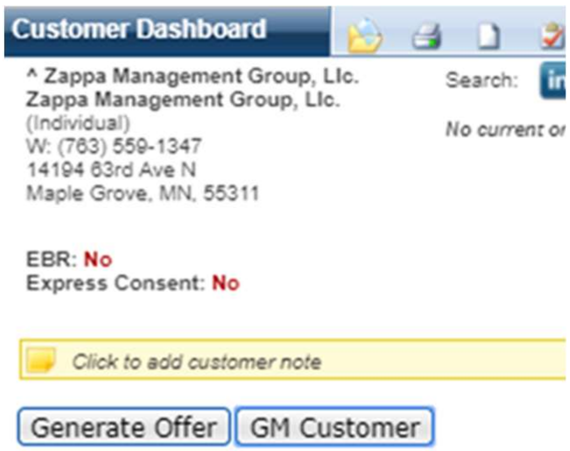


Customer Information is the default screen. If the customer is in the GM database, the information will be displayed under the GM Customer Search Results section (bottom half of the page). If there is no record, you will see a message informing you there is no data available.

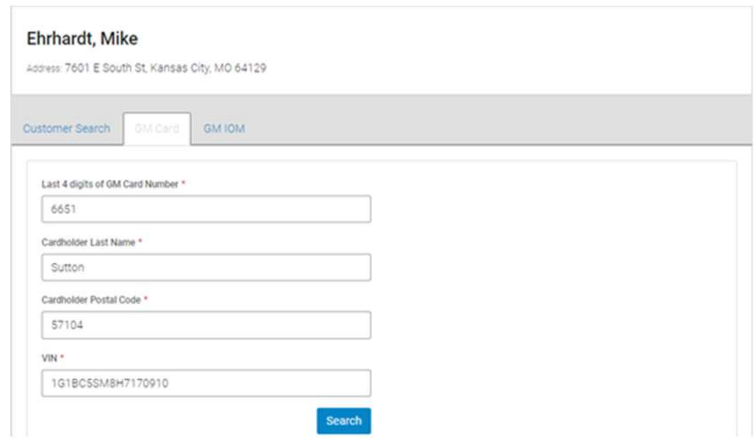
GM CARD STATUS

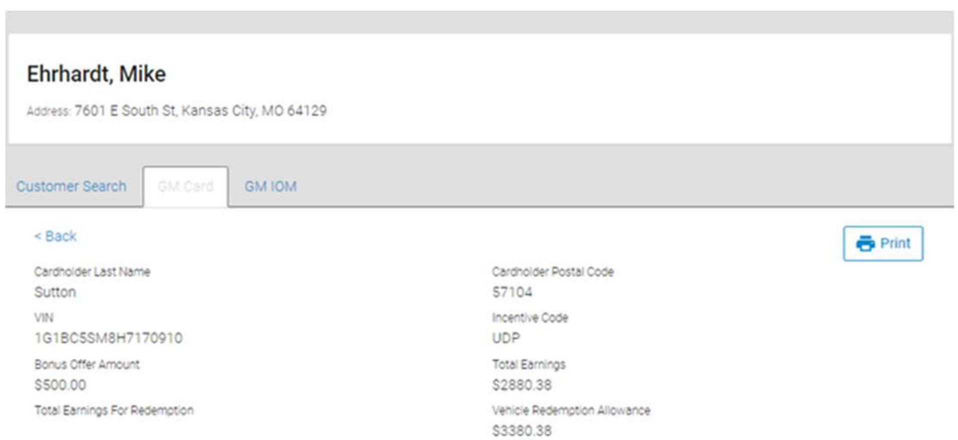
The GM Card Status provides information about the Customer's GM Card including, Bonus Offer Amount, Incentive Code, and Vehicle Redemption Allowance.

To view GM Card information, select **GM Customer**



Select **GM Card**, fill in the required information then select **Search**

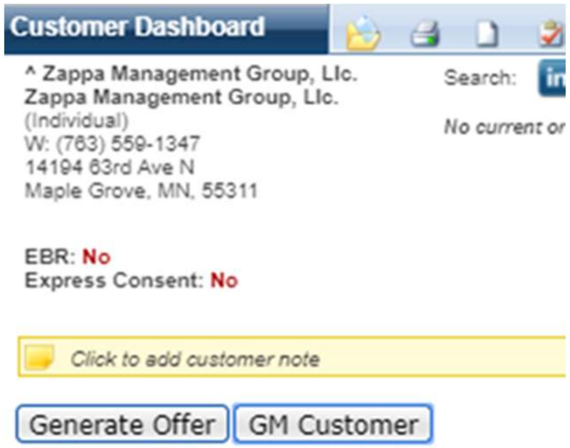




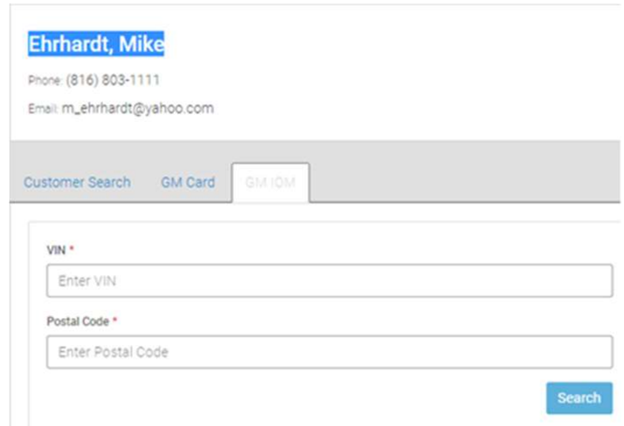
Vehicle Incentives (GM IOM)

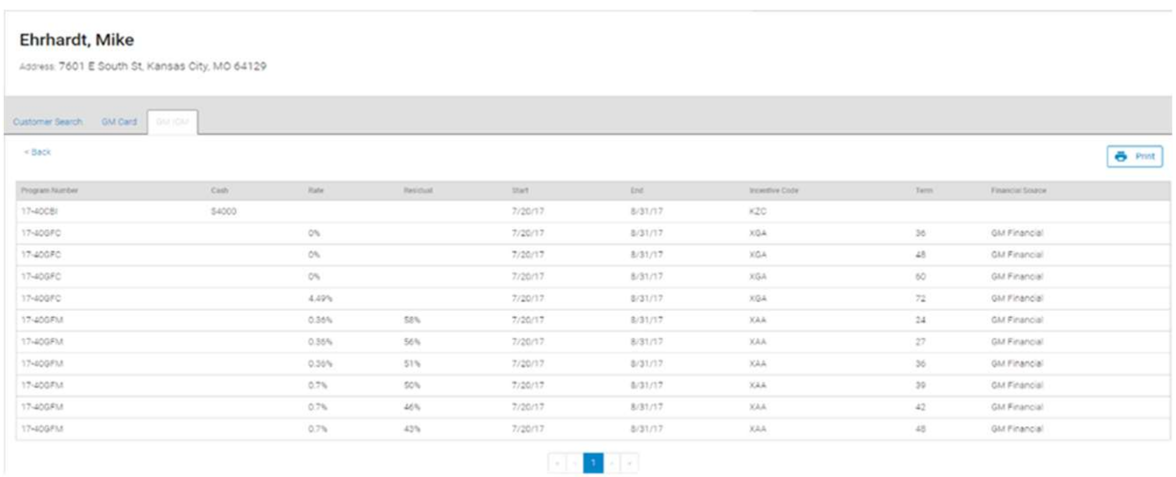
The GM IOM tab provides Incentive information for a specific vehicle

To view GM Card information, select **GM Customer**



Select **GM IOM**, fill in the required information then select **Search**



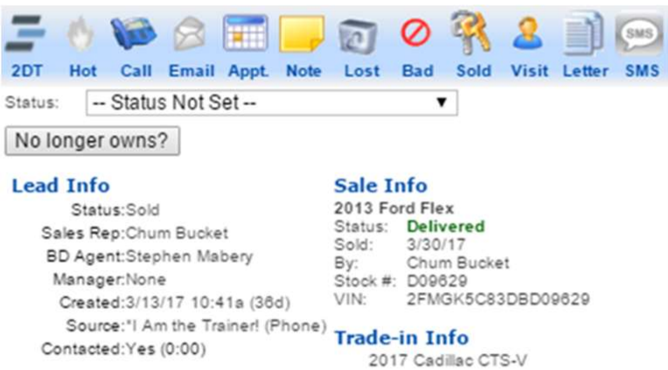


Program Number	Cash	Rate	Residual	Start	End	Incentive Code	Term	Financial Source
17-40CBI	$4000			7/20/17	8/31/17	K2C		
17-40GFC		0%		7/20/17	8/31/17	XGA	36	GM Financial
17-40GFC		0%		7/20/17	8/31/17	XGA	48	GM Financial
17-40GFC		0%		7/20/17	8/31/17	XGA	60	GM Financial
17-40GFC		4.49%		7/20/17	8/31/17	XGA	72	GM Financial
17-40GFM		0.36%	58%	7/20/17	8/31/17	XAA	24	GM Financial
17-40GFM		0.36%	56%	7/20/17	8/31/17	XAA	27	GM Financial
17-40GFM		0.36%	51%	7/20/17	8/31/17	XAA	36	GM Financial
17-40GFM		0.7%	50%	7/20/17	8/31/17	XAA	39	GM Financial
17-40GFM		0.7%	46%	7/20/17	8/31/17	XAA	42	GM Financial
17-40GFM		0.7%	43%	7/20/17	8/31/17	XAA	48	GM Financial

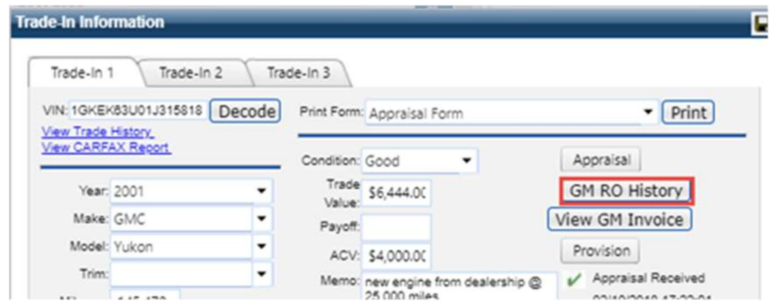
Repair Order (RO) Information

The GM RO History tab provides repair information for vehicles that have been serviced at a participating GM Dealership.

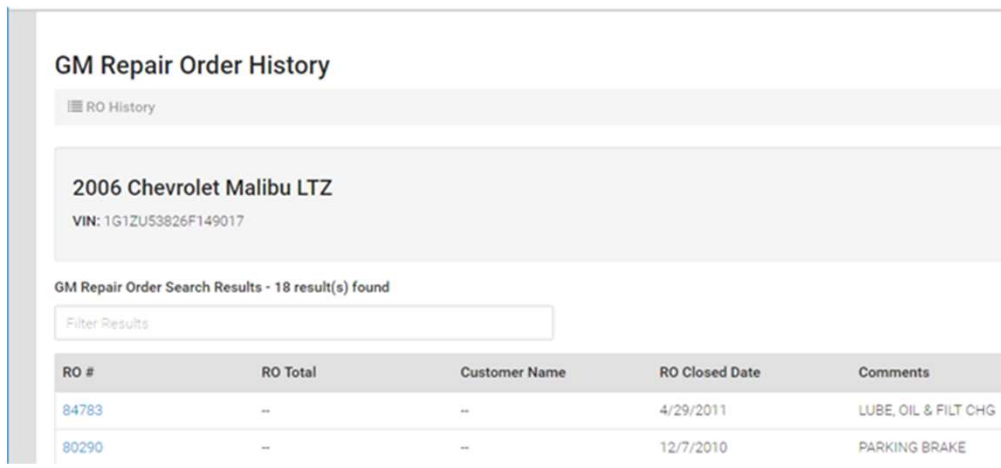
From the Customer Dashboard, select **Trade-in Info**



To view RO information select **GM RO History**



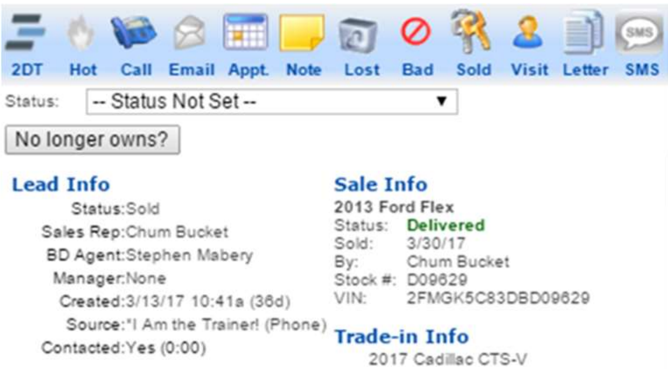
To view details about a specific RO, select the **RO#**



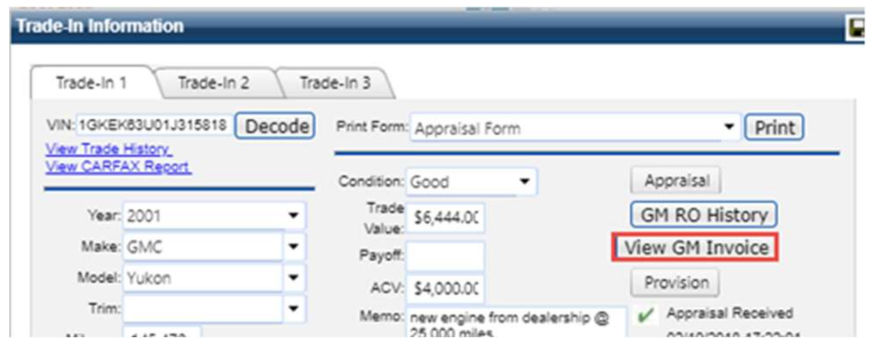
Vehicle Invoice

The provides the invoice for select vehicles

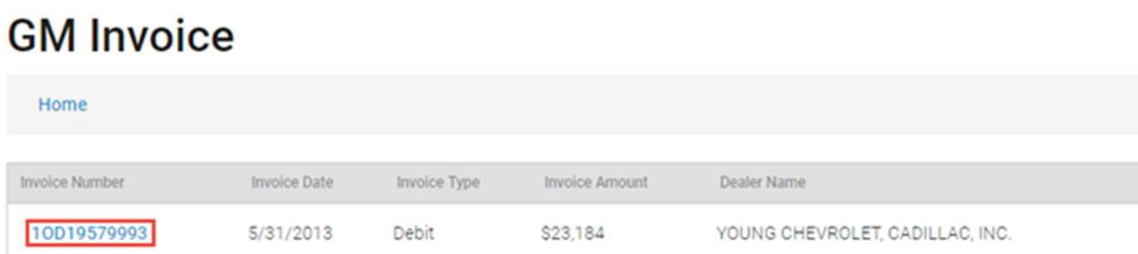
From the Customer Dashboard, select **Trade-in Info**



Select **View GM Invoice** to see the invoice for the vehicle listed



To view invoice details, select the **Invoice Number**



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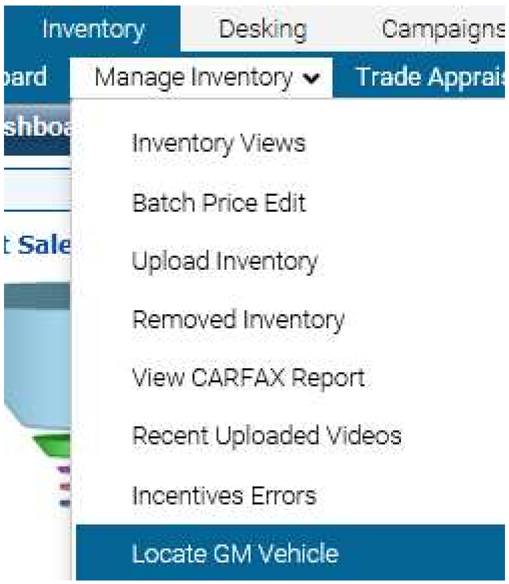
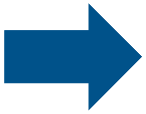
Vehicle Locate Service (VLS)

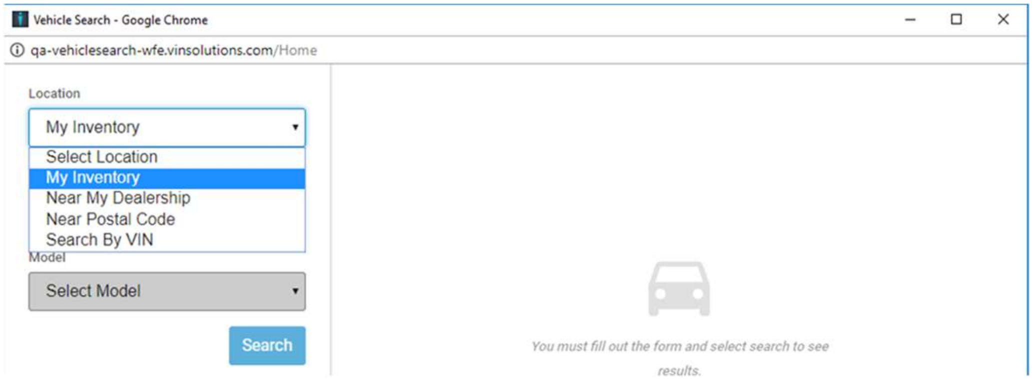
VLS provides dealers with a single vehicle locate service that can be accessed from CONNECT. Vehicle searches can be based geographic area (radius from dealership), Postal code or by VIN.

To access VLS select **Inventory** -> Hover over **Manage Inventory** -> **Locate GM Vehicle**





Using the Select Location drop-down menu, select how you want to search for the vehicle then select **Search**



- **My Inventory** – Selecting this option will allow you to search your inventory by Year, Make and Model.
- **Near My Dealership** – Selecting this option will allow you to search the inventory of participating dealerships located within a defined radius of your dealership.
- **Near Postal Code** - Selecting this option will allow you to search the inventory of participating dealerships located within a defined radius of a specific zip code.
- **Search By VIN** – Selecting this option will allow you to search participating dealer inventories for a specific vehicle by the VIN.

Continued on next page

Drive Growth Program

VinSolutions Connect CRM is Drive Growth Certified CRM. This means that we are active participants in this program and that by being a Connect CRM dealer, you will have the ability to access to the wonderful information and reports this program has to offer.

What is Drive Growth?

- ✓ GM's Drive Growth program consists of tools designed to provide statistical data analysis of Key Performance Indicators used to identify and develop key drivers that correlate to both high dealer RSI (Retail Sales Index) and Return on Sales. Drive Growth pairs industry, dealer, and site analytics data to give dealers unprecedented insight into their lead performance.

How can my dealership make use of this?

1. Drive Growth reports will be housed in DART for Dealer Operators/key dealership management to be able to download and analyze.

2. These reports are generated by GM based on a data Connect CRM shares with GM nightly (this data feed is called Dealer CRM Leads Feed).

3. To enroll in Drive Growth see the page entitled Enrollment Instructions.