

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

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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.

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).

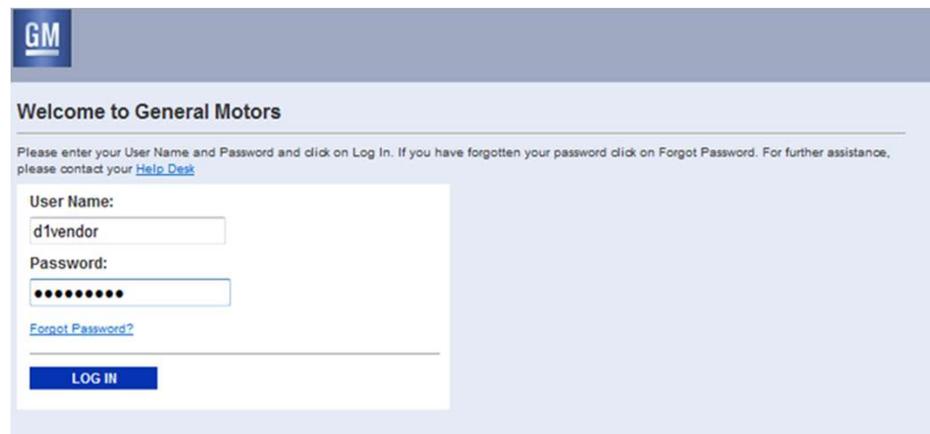
To ensure accuracy, **PLEASE INCLUDE THE FOLLOWING INFORMATION:**

- 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**”.



GM

Welcome to General Motors

Please enter your User Name and Password and click on Log In. If you have forgotten your password click on Forgot Password. For further assistance, please contact your [Help Desk](#)

User Name:
d1vendor

Password:
●●●●●●●●

[Forgot Password?](#)

LOG IN

Enrollment Instructions – Forms Completion

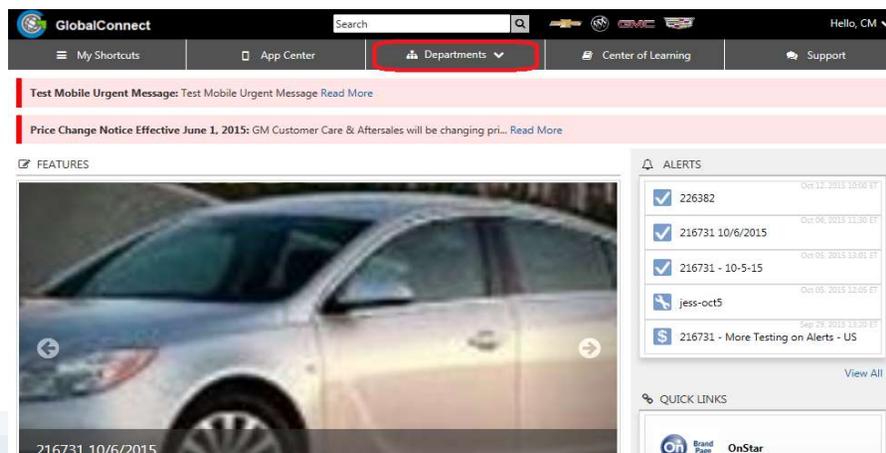
Step 3 – Dealer Completes online forms:

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

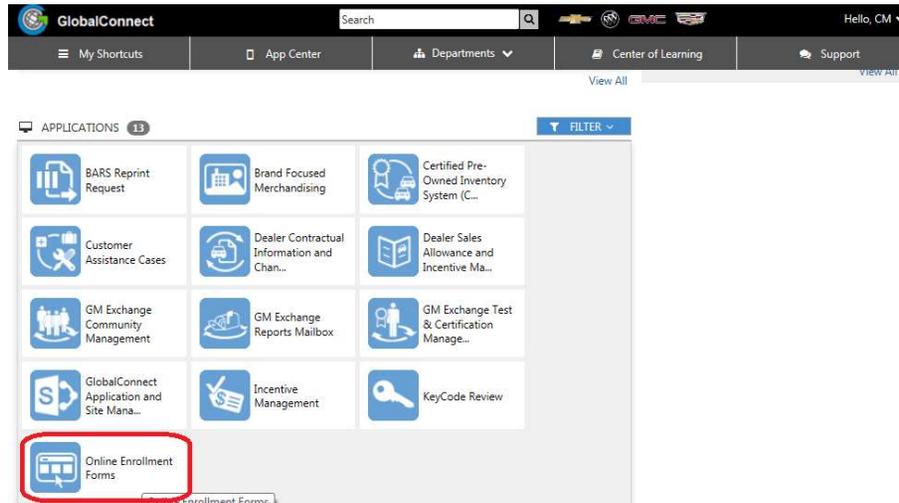
NOTICE: Although you may have previously completed these forms, they have changed and must be updated before the enrollment process can be completed.

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.

Vendor Authorization Form

[Vendor Selection Form](#)

Online Enrollment Forms

[Dealer Data Share Participation Agreements](#)

[Service Lane Tools Agreement](#)

[Online Service Scheduling Agreement](#)

[My Rewards Owner Loyalty Program](#)

[GM Parts Wholesale Dealer](#)

Enrollment Instructions – Forms Completion

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

The screenshot shows the 'Vendor Selection' form with the following fields and callouts:

- 1**: DTAP Category dropdown menu (set to CRM Sales)
- 2**: Vendor dropdown menu
- 3**: Product Name dropdown menu
- 4**: Authorized Signature text field (pre-populated with Erin Lakin)
- 5**: Title dropdown menu (set to Dealer Principal)
- 6**: Check box for 'I confirm I have viewed, read and agree to the Vendor Selection Agreement'
- 7**: Submit button

Other visible information includes: Company Name: TEST, BAC: 999970, Doing Business As: TEST, Primary Dealer Code(s): 00110013, Secondary Dealer Code(s): JACKSON, WY, CC&A Code: UNITED STATES, and Date: 3/13/2018.

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: 0000999970
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 provided in the program's Terms and Conditions

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 preferences for this dealership.

Name: Phone:

Alternate Contact Info (if applicable)

Name: Phone:

Enrollment Instructions – Forms Completion

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

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 update 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 DCDE is a prerequisite for enrollment in DCDE.

Documents
 DCDE_Agreement.pdf

Opt-Out All

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 preferences and enter into the GM Data Share Participation Agreements referenced above.

Name: Phone: Email:

Alternate Contact Info (if applicable)
Name: Phone: Email:

Title *

Submission Date:

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.

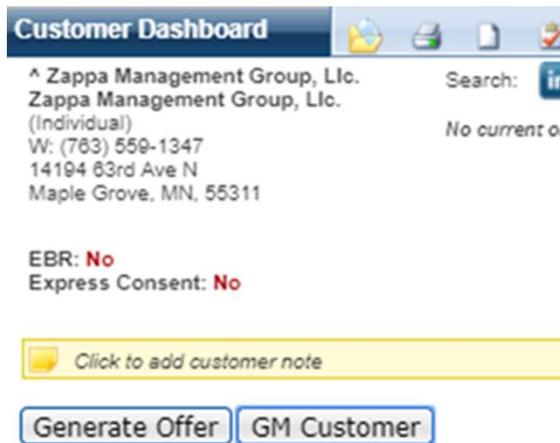
This information includes customer information, repair history, Incentives, GM Reward Card status, Invoices, Vehicle Location services and GM Drive Growth information.

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 Dashboard

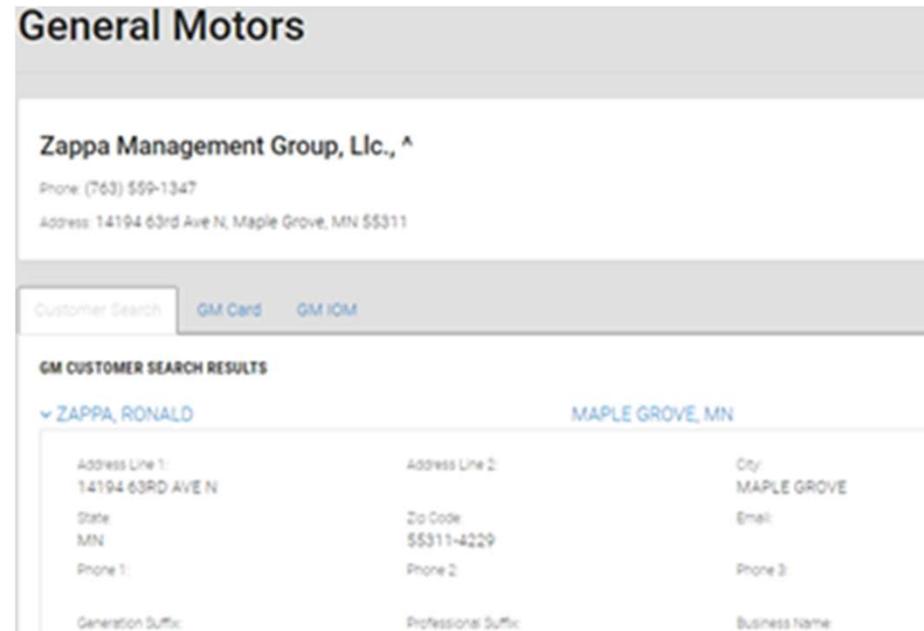
^ Zappa Management Group, Llc.
Zappa Management Group, Llc.
(Individual)
W: (763) 559-1347
14194 63rd Ave N
Maple Grove, MN, 55311

Search:  *No current or*

EBR: No
Express Consent: No

 Click to add customer note

[Generate Offer](#) [GM Customer](#)



General Motors

Zappa Management Group, Llc., ^
Phone: (763) 559-1347
Address: 14194 63rd Ave N, Maple Grove, MN 55311

Customer Search [GM Card](#) [GM IOM](#)

GM CUSTOMER SEARCH RESULTS

MAPLE GROVE, MN

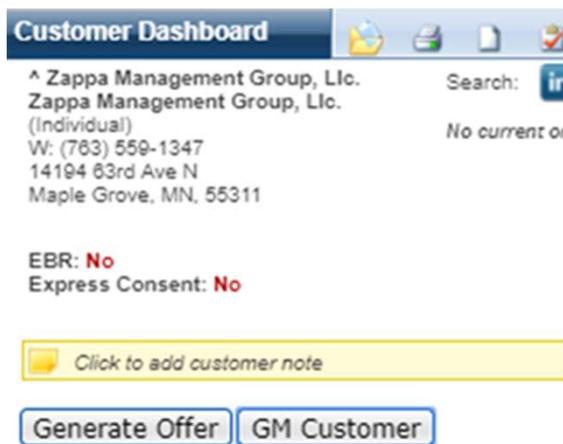
Address Line 1: 14194 63RD AVE N	Address Line 2:	City: MAPLE GROVE
State: MN	Zip Code: 55311-4229	Email:
Phone 1:	Phone 2:	Phone 3:
Generation Suffix:	Professional Suffix:	Business Name:

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**



Customer Dashboard

^ Zappa Management Group, Llc.
Zappa Management Group, Llc.
(Individual)
W: (763) 559-1347
14194 63rd Ave N
Maple Grove, MN, 55311

Search:

No current or

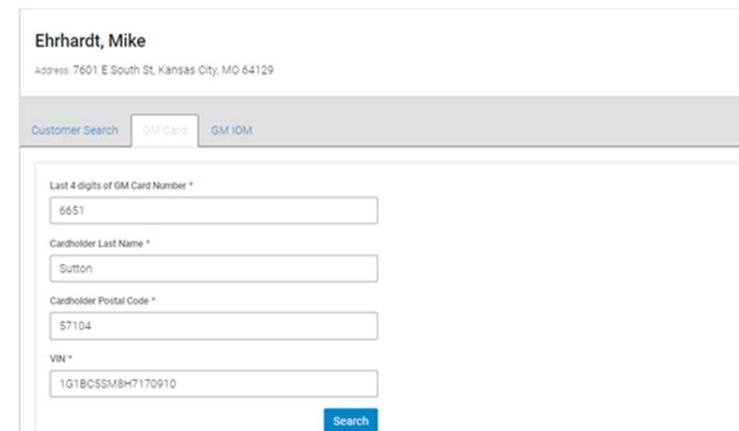
EBR: **No**
Express Consent: **No**

[Click to add customer note](#)

[Generate Offer](#) [GM Customer](#)



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



Ehrhardt, Mike
Address: 7601 E South St, Kansas City, MO 64129

Customer Search **GM Card** GM IOM

Last 4 digits of GM Card Number *

Cardholder Last Name *

Cardholder Postal Code *

VIN *

[Search](#)



Ehrhardt, Mike
Address: 7601 E South St, Kansas City, MO 64129

Customer Search **GM Card** GM IOM

[< Back](#) [Print](#)

Cardholder Last Name Sutton	Cardholder Postal Code 57104
VIN 1G1BC5SM8H7170910	Incentive Code UDP
Bonus Offer Amount \$500.00	Total Earnings \$2880.38
Total Earnings For Redemption	Vehicle Redemption Allowance \$3380.38

Vehicle Incentives (GM IOM)

The GM IOM tab provides Incentive information for a specific vehicle

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

Customer Dashboard

^ Zappa Management Group, Llc.
Zappa Management Group, Llc.
(Individual)
W: (763) 559-1347
14194 63rd Ave N
Maple Grove, MN, 55311

Search:

No current or

EBR: **No**
Express Consent: **No**

[Click to add customer note](#)

[Generate Offer](#) [GM Customer](#)



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

Ehrhardt, Mike
Phone: (816) 803-1111
Email: m_ehrhardt@yahoo.com

Customer Search GM Card **GM IOM**

VIN *

Postal Code *

[Search](#)



Ehrhardt, Mike
Address: 7601 E South St, Kansas City, MO 64129

Customer Search GM Card **GM IOM**

[Back](#) [Print](#)

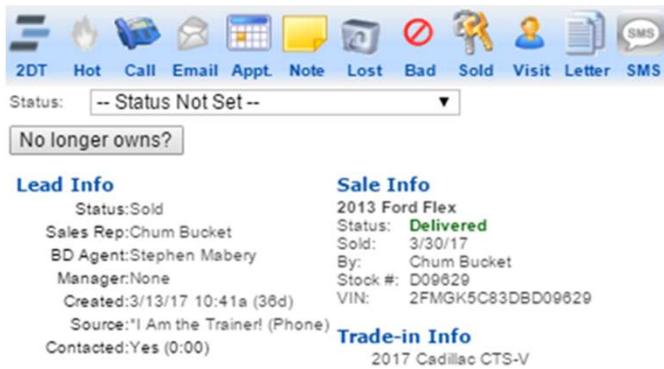
Program Number	Cash	Rate	Residual	Start	End	Incentive Code	Term	Financial Source
17-400BI	\$4000			7/20/17	8/31/17	KZC		
17-400FC		0%		7/20/17	8/31/17	XGA	36	GM Financial
17-400FC		0%		7/20/17	8/31/17	XGA	48	GM Financial
17-400FC		0%		7/20/17	8/31/17	XGA	60	GM Financial
17-400FC		4.49%		7/20/17	8/31/17	XGA	72	GM Financial
17-400FM		0.36%	56%	7/20/17	8/31/17	XAA	24	GM Financial
17-400FM		0.36%	56%	7/20/17	8/31/17	XAA	27	GM Financial
17-400FM		0.36%	51%	7/20/17	8/31/17	XAA	36	GM Financial
17-400FM		0.7%	50%	7/20/17	8/31/17	XAA	39	GM Financial
17-400FM		0.7%	46%	7/20/17	8/31/17	XAA	42	GM Financial
17-400FM		0.7%	43%	7/20/17	8/31/17	XAA	48	GM Financial

[1](#)

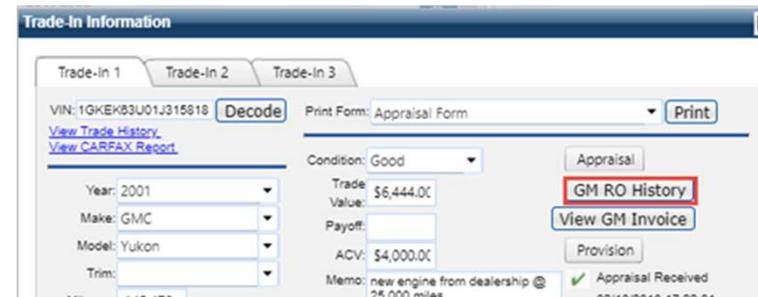
Repair Order (RO) Information

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

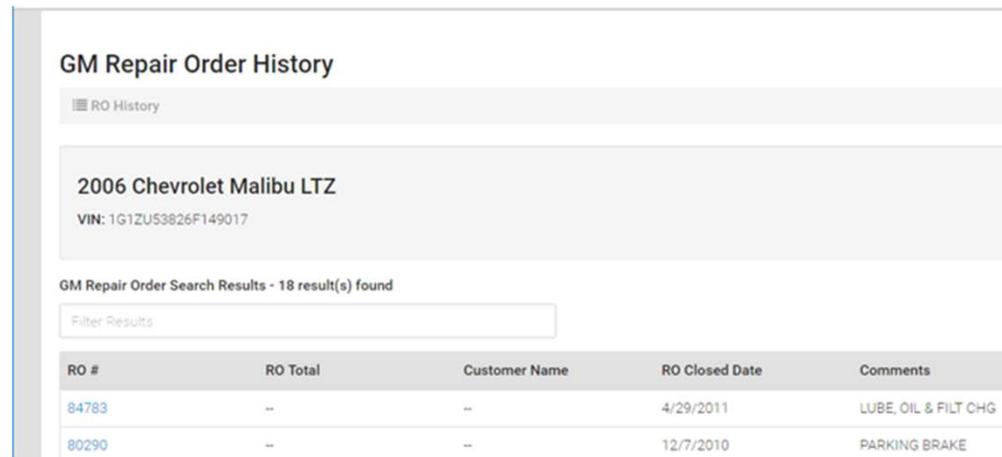
From the Customer Dashboard, select **Trade-in Info**



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



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

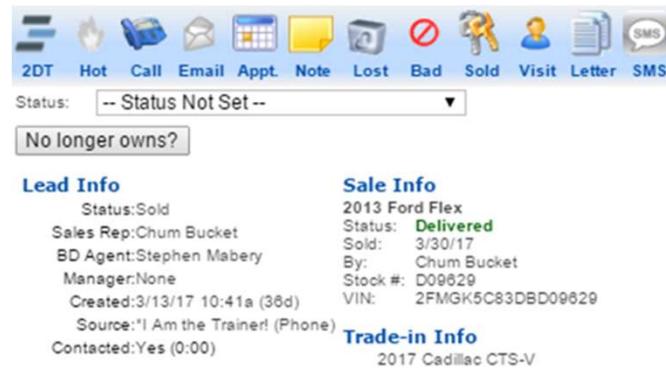


RO #	RO Total	Customer Name	RO Closed Date	Comments
84783	--	--	4/29/2011	LUBE, OIL & FILT CHG
80290	--	--	12/7/2010	PARKING BRAKE

Vehicle Invoice

The provides the invoice for select vehicles

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



A screenshot of a customer dashboard interface. At the top, there is a navigation bar with icons for 2DT, Hot, Call, Email, Appt., Note, Lost, Bad, Sold, Visit, Letter, and SMS. Below this is a status dropdown menu set to "-- Status Not Set --" and a button labeled "No longer owns?". The main content area is divided into two columns: "Lead Info" and "Sale Info".

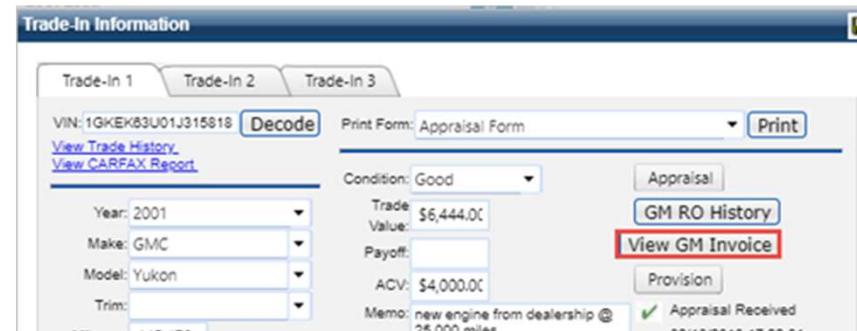
Lead Info
Status: Sold
Sales Rep: Chum Bucket
BD Agent: Stephen Mabery
Manager: None
Created: 3/13/17 10:41a (36d)
Source: *I Am the Trainer! (Phone)
Contacted: Yes (0:00)

Sale Info
2013 Ford Flex
Status: **Delivered**
Sold: 3/30/17
By: Chum Bucket
Stock #: D09629
VIN: 2FMGK5C83DBD09629

Trade-in Info
2017 Cadillac CTS-V



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

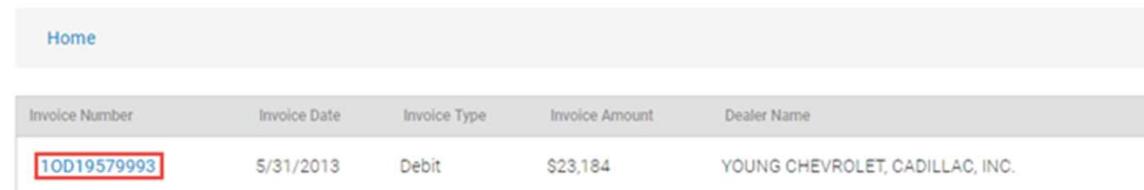


A screenshot of the "Trade-In Information" screen. It features a header with "Trade-In 1", "Trade-In 2", and "Trade-In 3" tabs. The main content includes a VIN field (1GKEK83U01J315818) with a "Decode" button, a "Print Form" dropdown set to "Appraisal Form", and a "Print" button. Below this are fields for Year (2001), Make (GMC), Model (Yukon), and Trim. To the right, there are fields for Condition (Good), Trade Value (\$6,444.00), Payoff, and ACV (\$4,000.00). A "Memo" field contains the text "new engine from dealership @ 25,000 miles". On the far right, there are buttons for "Appraisal", "GM RO History" (highlighted with a red box), "Provision", and "Appraisal Received".



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

GM Invoice



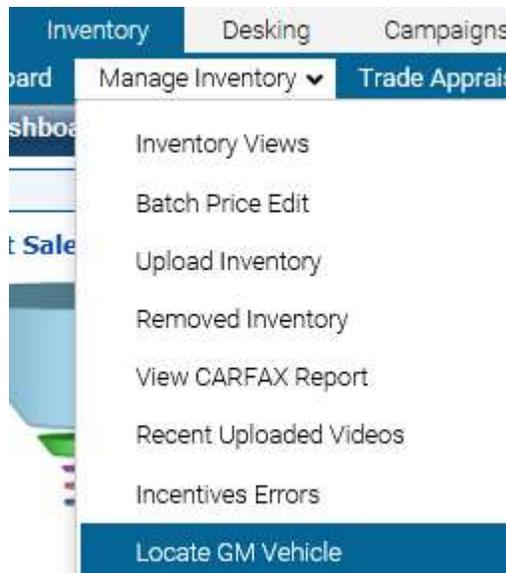
A screenshot of a table titled "GM Invoice". The table has a "Home" link at the top left. The table columns are "Invoice Number", "Invoice Date", "Invoice Type", "Invoice Amount", and "Dealer Name". The first row is highlighted with a red box around the "Invoice Number" cell.

Invoice Number	Invoice Date	Invoice Type	Invoice Amount	Dealer Name
TOD19579993	5/31/2013	Debit	\$23,184	YOUNG CHEVROLET, CADILLAC, INC.

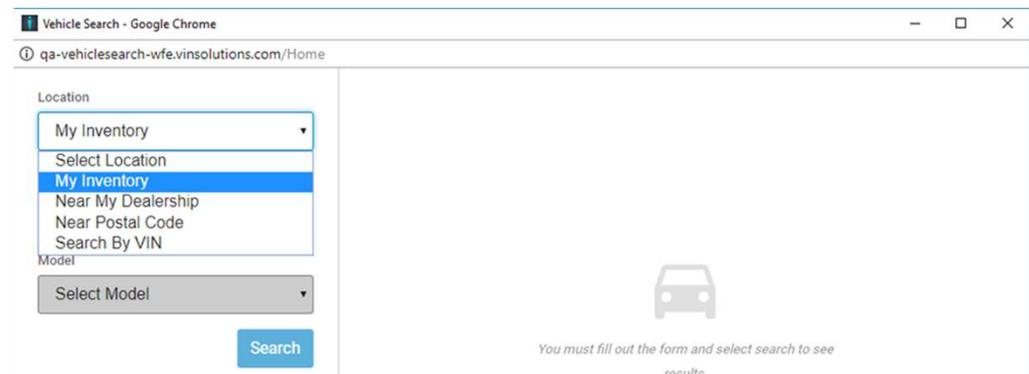
Vehicle Locate Service (VLS)

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.

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.