

Ally Dash

Sleek. Refined. Streamlined. We optimized the dealer experience.

Ally Dash

Dealer Admin Job Aid

v.02.01.2021

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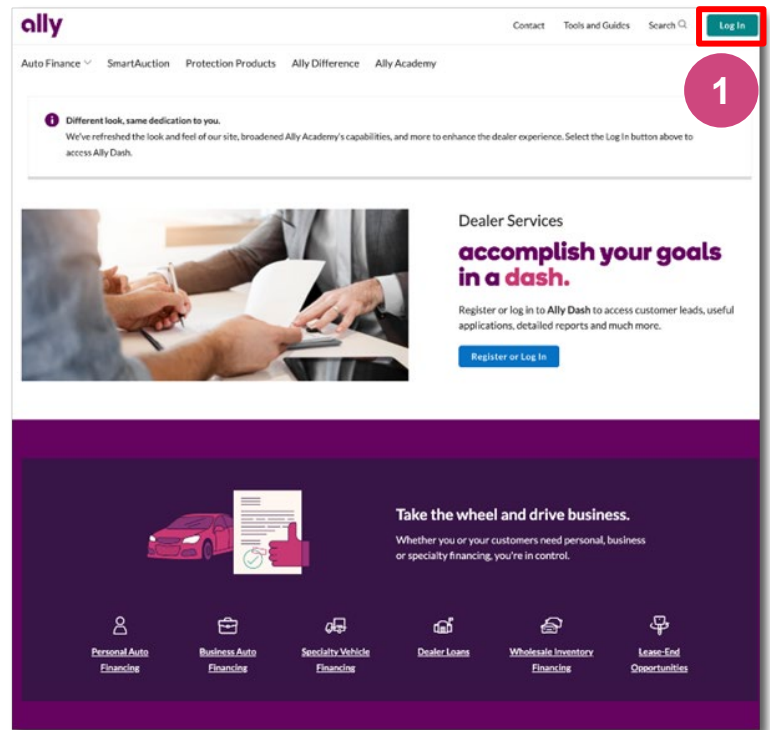
Request for Access

Step 1:

Go to allydealer.com.

Click **Log In**.

Note: For first time users, click the **Log In** button and register on the Ally Dash Login page.

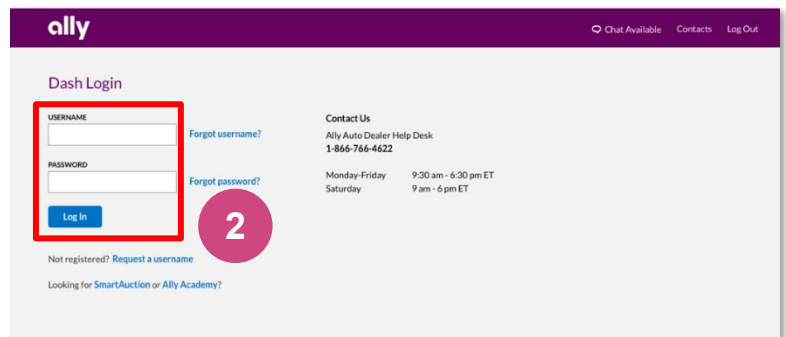


Step 2:

Enter your Username and Password.

Click **Log In**.

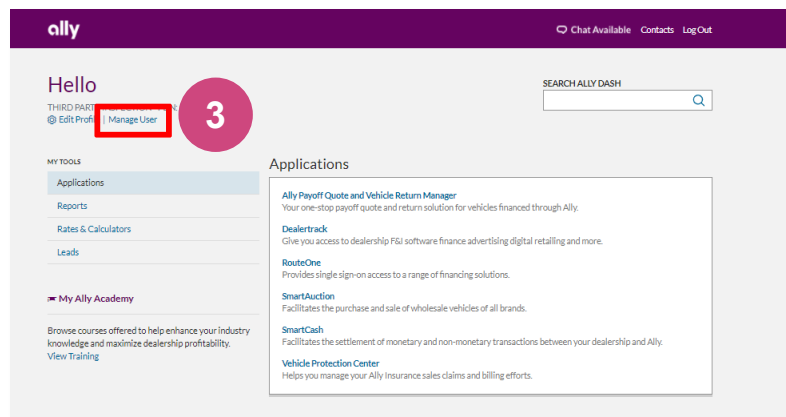
Note: If having login difficulty, the Help Desk contact information is provided for existing users or click the **Request a username** link for new users. Then, follow the prompts.



Step 3:

From the Ally Dash Landing page, click **Manage User**.

Note: After clicking Manage User, you can view pending user requests or can search for a specific user.



Pending Request View

Your default view shows Pending Requests:

- **Registration Requests**
 - New users requesting access to the PDN for which you are an Admin
- **Applications/Reports Requests**
 - Requests for Applications/Reports initiated from **Edit Profile**

Choose to approve or reject each submitted request on an individual basis.

Click **Confirm**.

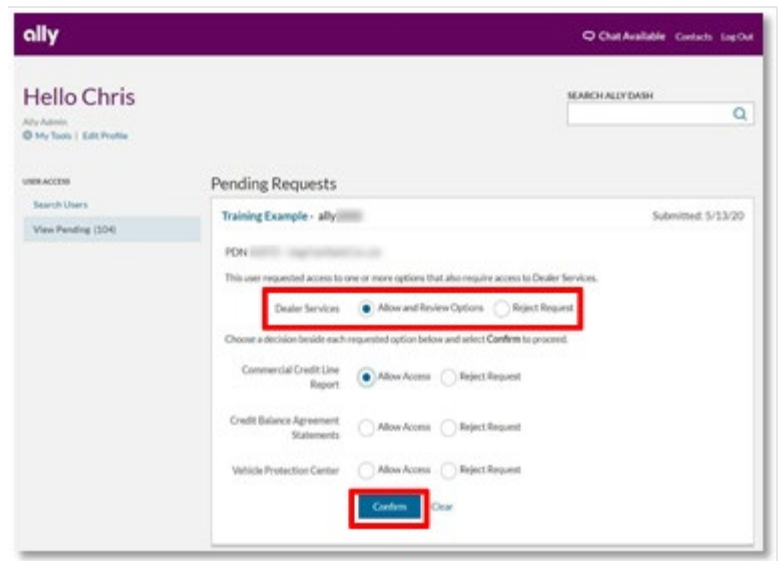
A confirmation message appears that your selection(s) was implemented.

Users will have immediate access to Ally Dash upon Admin approval.

Note: Some applications such as SmartAuction, SmartCash, and Vehicle Protection Center require additional setup in the system.

A notification is sent to the application teams to complete application setup.

A user may experience an error message until those applications are setup.



Search

Select the appropriate search criteria from the Search By drop-down menu.

Enter the fields provided.

Click **Search**.

Note: If a dealer has less than 10 users, the Search field will not appear.

ally

Chat Unavailable Contacts Log Out

Hello Chris
Ally Admin
My Tools | Edit Profile

SEARCH ALLY DASH

USER ACCESS

Search Users

View Pending (00)

Find a user to update their status, access or password.

Search By Username

Username

Search

Users display in alphabetical order.

Click the appropriate name to view user access.

ally

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SEARCH ALLY DASH

USER ACCESS

Search Users

View Pending (00)

Find a user to update their status, access or password.

Search By Name

First Name Training

Last Name Example

Search

NAME	DEALERSHIP	STATE	USER STATUS
Example Training	PCN	CT	Pending Active

Previous Next

Modifying User Access

User Edits

For any user selected, you can:

- Update personal information, user status or remove a user
- Create temporary password
- Add and remove user applications
- Add and remove applications for an associated dealership
- Add associate dealership for user to access leads or reports

The screenshot shows the 'View Access for' page for a user named Chris. The page is divided into several sections:

- PERSONAL INFORMATION:** Fields for NAME, USER NAME, PRIMARY DEALERSHIP (PDM), ROLE (Dealership Admin), CELL PHONE, EMAIL, and USER STATUS (Active). There are 'Edit' and 'Remove user' links.
- APPLICATIONS & REPORTS:** A list of applications including Vehicle Protection-Center, Credit Balance Agreement Statements, Commercial Credit Line Report, Statement of Dealer Transactions, Wholesale Billing Statement, SmartAction, SmartCash, RouteOne, Manage Users, and SmartGrounding. There is an 'Add' and 'Remove' link.
- ASSOCIATED DEALERSHIPS:** A section for PDM with 'Leads' and 'Add'/'Remove' links.

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Edit Personal Information

Click **Edit**.

Dealer Admins can edit a user's information by typing in the boxes displayed.

Note: **Only an Ally Admin** can reactivate a user when they are in Suspended status. Contact the Region or Help Desk for assistance

To reactivate a user in Locked status, a Dealer Admin can create a temporary password for the user, following the steps below for **Create Temporary Password**.

The screenshot shows the 'View Access for' page with the 'Edit' button highlighted in a red box. A modal window is open with the following content:

You can edit your information below.

- First Name: [Text Input]
- Last Name: [Text Input]
- Cell Phone (Optional): [Text Input]
- Email: [Text Input]
- User Status: Active

A 'Submit' button is highlighted in a red box at the bottom of the modal.

A confirmation message appears confirming the updates to the user's profile.

The screenshot shows the 'View Access for' page for a user. The 'PERSONAL INFORMATION' section includes fields for NAME, USER NAME, PRIMARY DEALERSHIP, ROLE, CELL PHONE, EMAIL, and USER STATUS. The USER STATUS is 'Active'. At the bottom of the profile section, there are 'Edit' and 'Remove user' links. A red box highlights a green confirmation message at the bottom of the page: 'You've updated the user's profile'.

Remove User

Click **Remove User** tab.

A message will display asking to confirm the action.

Click **Remove User** button to confirm.

This screenshot is similar to the previous one, but the 'Remove user' link in the 'Edit' section is highlighted with a red box. Below the profile information, a 'Remove User' dialog box is displayed. The dialog contains the text: 'Once you remove this user, they can no longer access Dealer Services. Select Remove User to confirm.' A red box highlights the 'Remove User' button at the bottom of the dialog.

Create Temporary Password

Enter temporary password twice, as directed and provide verbally to user.

Click **Create Password**.

Note: User will be prompted to change this password upon first login.

The screenshot shows the 'PASSWORD' page with a 'Create Temporary Password' dialog box. The dialog includes instructions: 'The temporary password you create cannot be the same as the recipient's previous 6 passwords and must contain 8 to 20 characters, no spaces, with at least 1 uppercase letter, 1 lowercase letter and 1 number. It cannot contain any unsupported characters (< > % = ?) or the recipient's username.' A note states: 'The user's status will automatically update to Active after they sign in with this temporary password and create their new password.' There are two input fields: 'Enter Password' (containing '[Tempassword123]') and 'Confirm Password' (containing '*****'). To the right of the input fields are four green checkmarks indicating requirements: '8 - 20 characters', '1 uppercase letter', '1 lowercase letter', and '1 number'. A blue 'Create Password' button is at the bottom.

A confirmation message appears advising a temporary password was created.



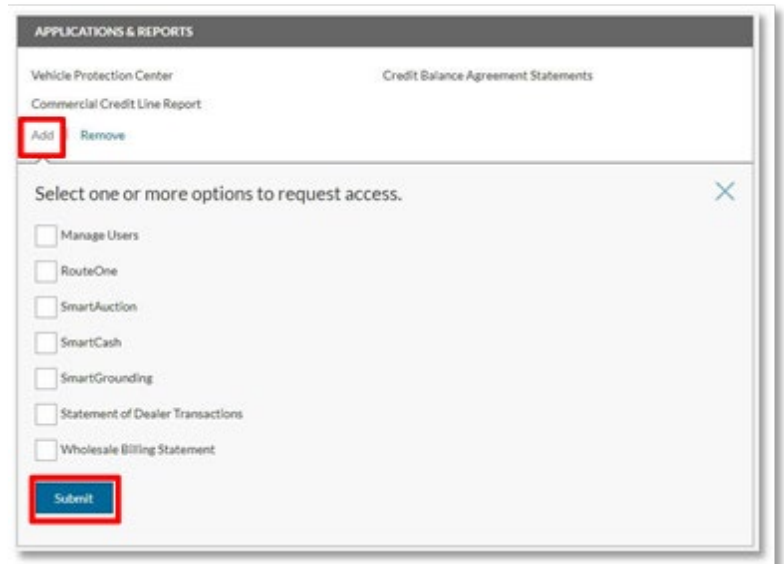
Add Application(s) or Report(s)

Click **Add**.

Select the application(s) and/or Report(s) to grant a user access to for the primary dealership.

Click **Submit**.

Note: Since Dealer Admin is selecting, no additional approval is needed.



A confirmation message appears advising the Application(s) and/or Report(s) were added.



Remove Application(s) or Report(s)

Click **Remove**.

Select the application(s) and/or Report(s) to remove from user access to for the primary dealership.

Click **Submit**.

APPLICATIONS & REPORTS

Vehicle Protection Center	SmartAuction
Credit Balance Agreement Statements	SmartCash
Commercial Credit Line Report	RouteOne
Statement of Dealer Transactions	Manage Users
Wholesale Billing Statement	SmartGrounding

Add Remove

Select the options you'd like to remove:

- Commercial Credit Line Report
- Credit Balance Agreement Statements
- Manage Users
- RouteOne
- SmartAuction
- SmartCash
- SmartGrounding
- Statement of Dealer Transactions
- Vehicle Protection Center
- Wholesale Billing Statement

Submit

Click **Remove** to confirm removing user access to Application(s) and/or Report(s).

Remove Option

Removing this application or report will end the user's access to it.

Select Remove to confirm.

Remove

Add Associated Dealership(s)

Click **Add Associated Dealership**.

APPLICATIONS & REPORTS

Vehicle Protection Center	SmartAuction
Credit Balance Agreement Statements	SmartCash
Commercial Credit Line Report	RouteOne
Statement of Dealer Transactions	Manage Users
Wholesale Billing Statement	SmartGrounding

Add | Remove

+ Add Associated Dealership

ASSOCIATED DEALERSHIPS

PDN

Leads

Add | Remove

Select the **PDN** or **Dealership Name** from the Search By drop-down menu.

Enter the PDN or Dealership name/state into the appropriate fields.

Click **Search**.

The screenshot shows a dialog box titled "Add Associated Dealership" with a close button (X) in the top right corner. Below the title is the instruction "Request to add one or more dealership to your network:". There are two input fields: "Search By" with a dropdown menu currently showing "PDN", and "PDN" with an empty text box. A blue "SEARCH" button is located below the "PDN" field and is highlighted with a red rectangular box.

Click **Add**.

Note: If multiple results return, click the dealership radio button to add.

This screenshot shows the same dialog box after a search. The "Search By" dropdown is still "PDN" and the "PDN" text box now contains a value. Below the input fields, the text "1 result found for PDN: [redacted]" is visible. A blue "ADD" button is highlighted with a red rectangular box.

Choose the desired applications and reports for the Associated Dealership.

Click **Submit**.

Note: Admins must select at least one of the following options to create an associated dealer.

- Leads
- CAP Statement
- Commercial Credit Line Report
- Statement of Dealer Transactions
- Wholesale Billing Statement

The screenshot shows a dialog box titled "Choose Applications & Reports" with a close button (X) in the top right corner. Below the title is the instruction "You can select one or more options below to request access for this dealership. Select Submit to complete your request:". There is a list of seven options, each with a checkbox:

- Commercial Credit Line Report
- Credit Balance Agreement Statements
- Leads
- SmartGrounding
- Statement of Dealer Transactions
- Wholesale Billing Statement
- Manage Users

 At the bottom of the dialog, there are two buttons: a blue "Submit" button (highlighted with a red rectangular box) and a grey "Cancel" button.

Add Application(s) or Report(s) for Associated Dealerships

Click **Add**.

Select the application(s) and/or Report(s) to add from user access to for the Associated dealership(s).

Click **Submit**.

Note: Admins must select at least one of the following options to create an associated dealer.

- Leads
- CAP Statement
- Commercial Credit Line Report
- Statement of Dealer Transactions
- Wholesale Billing Statement

ASSOCIATED DEALERSHIPS

PDN [redacted]

Leads

Add Remove

Select one or more options to request access. X

Commercial Credit Line Report

Credit Balance Agreement Statements

Manage Users

SmartGrounding

Statement of Dealer Transactions

Wholesale Billing Statement

Submit

Remove Application(s) or Report(s) for Associated Dealerships

Click **Remove**.

Select the application(s) and/or Report(s) to remove from user access to for the Associated dealership(s).

Click **Submit**.

Note: Admins must select at least one of the following options to create an associated dealer.

- Leads
- CAP Statement
- Commercial Credit Line Report
- Statement of Dealer Transactions
- Wholesale Billing Statement

ASSOCIATED DEALERSHIPS

PDN 32016 - CLASSIC CHEVROLET, INC.

Commercial Credit Line Report Leads

Add **Remove**

Select the options you'd like to remove: X

Commercial Credit Line Report

Leads

Submit

Click **Remove** to confirm ending associated dealership access to Application(s) and/or Report(s).

