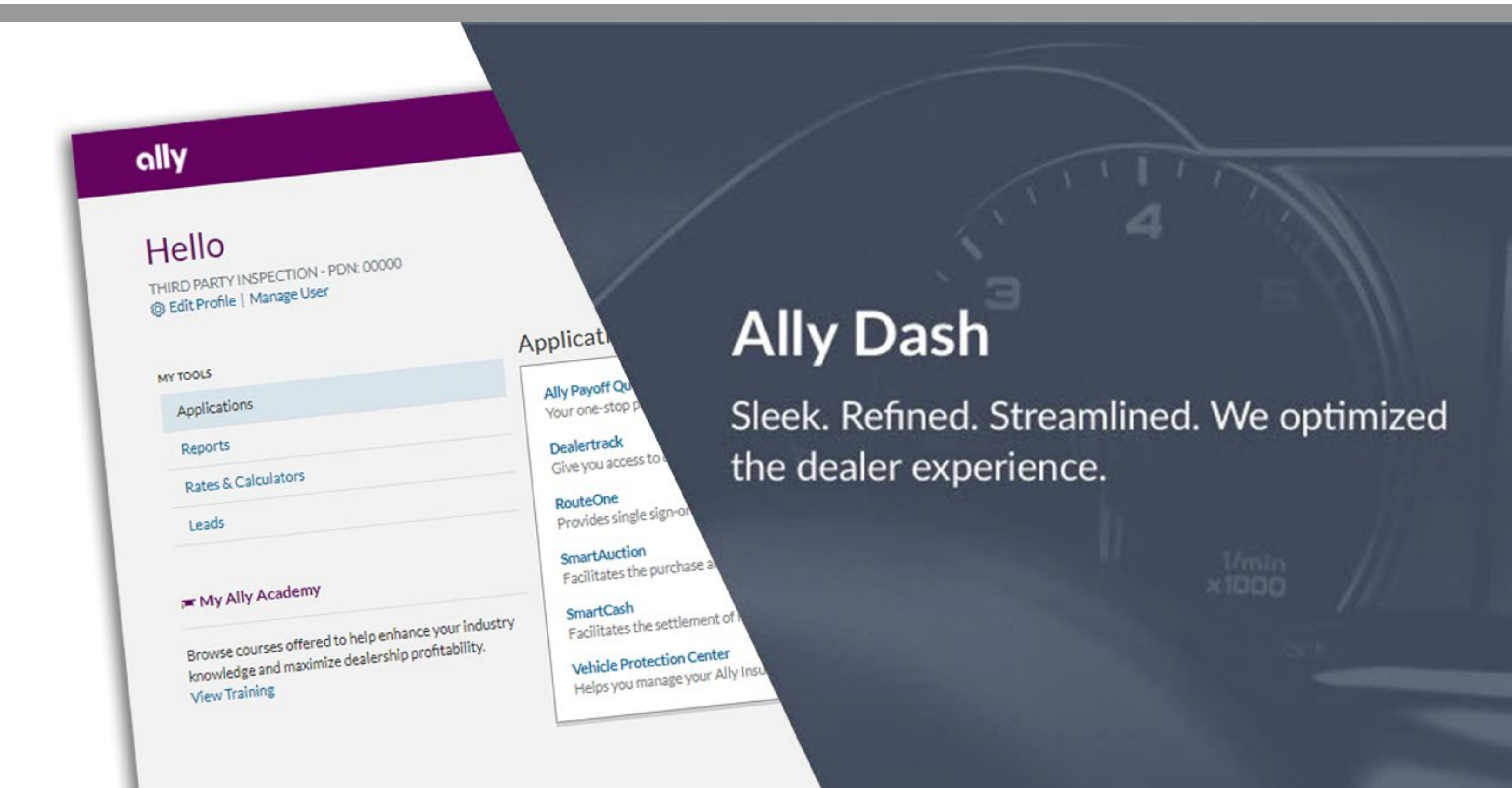


Ally Dash

Dealer Admin Job Aid

v.02.01.2021

Table of Contents

Disclaimer

Ally Financial provides this material as a service to participating dealerships.

It is intended to cover general principles. These principles may not be appropriate for every situation; the material cannot anticipate every situation each dealership will face. Nor does this material relieve a dealership of its sole responsibility for its decisions and actions. Each dealership must ensure that all of its decisions and actions comply with applicable laws and principles of fair and ethical treatment of consumers.

By viewing this material, neither a dealership nor its employees becomes an agent of Ally Financial. By providing this material, Ally Financial does not become an agent of the dealership, and Ally Financial assumes no responsibility for the conduct of the dealership or its employees.

Image(s), video, and music (as applicable) are used under license from Shutterstock.com, Getty Images and Music, eLearningbrothers Library, Articulate, or permission from copyrighted sources.

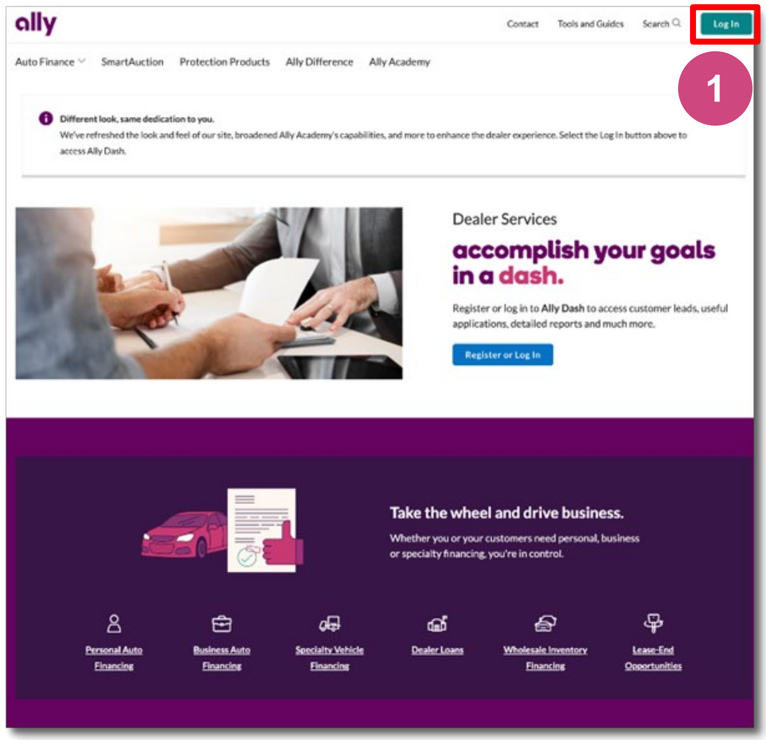
Request for Access

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.

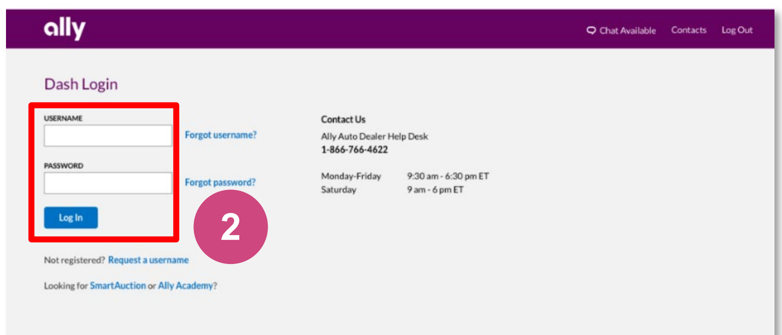


Step 2:

Enter your Username and Password.

Click **Log In**.

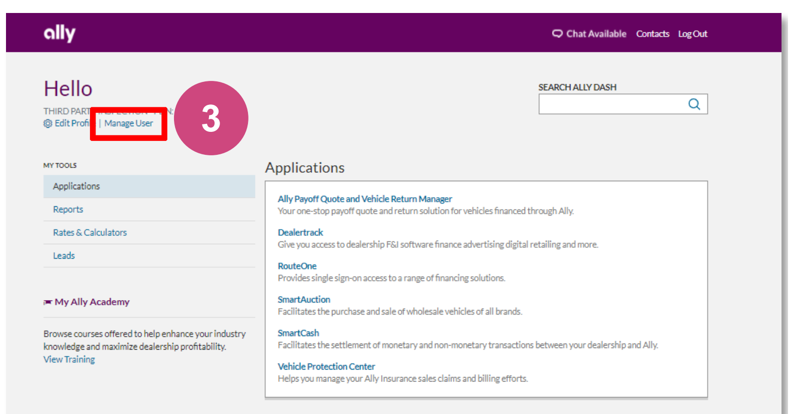
Note: If having login difficulty, the Help Desk contact information is provided for existing users or click the **Request a username** link for new users. Then, follow the prompts.



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.



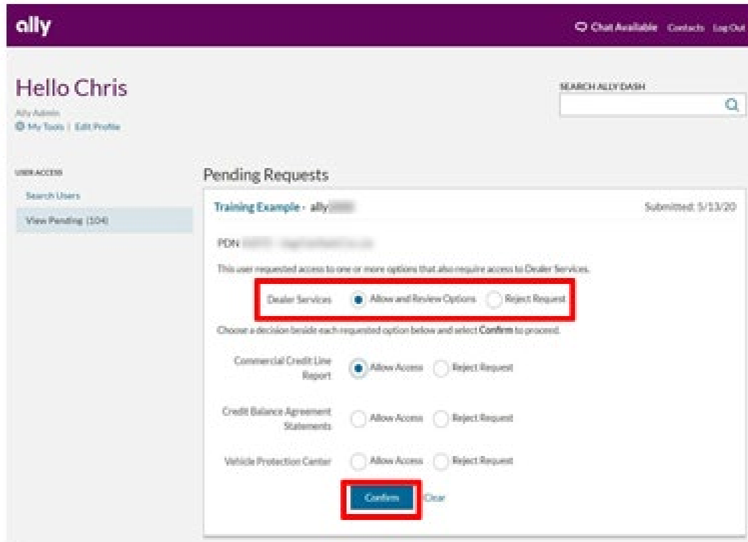
Pending Request View

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.

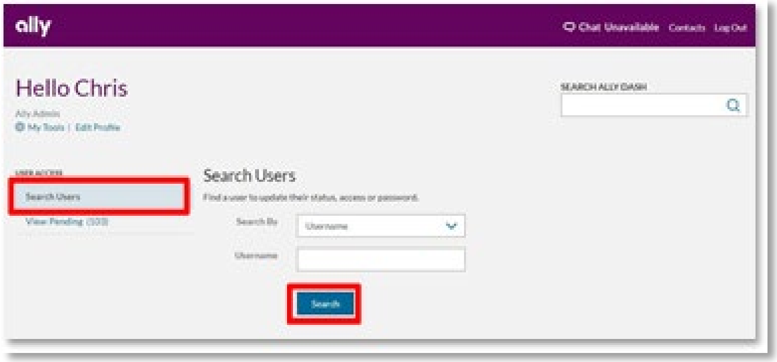
Search

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

Enter the fields provided.

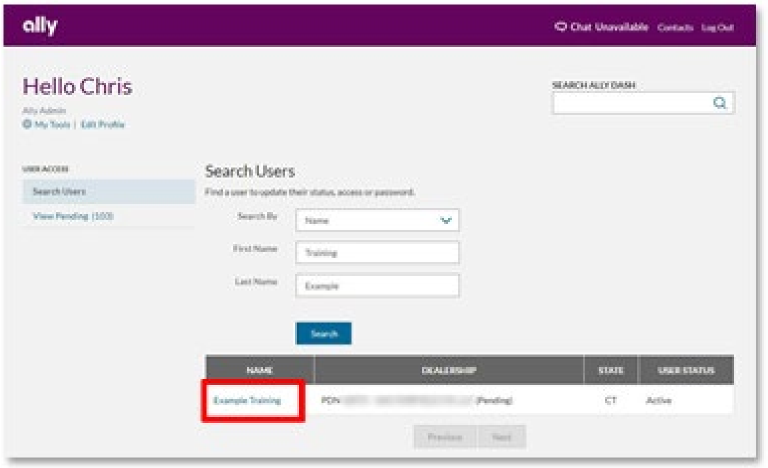
Click **Search**.

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



Users display in alphabetical order.

Click the appropriate name to view user access.

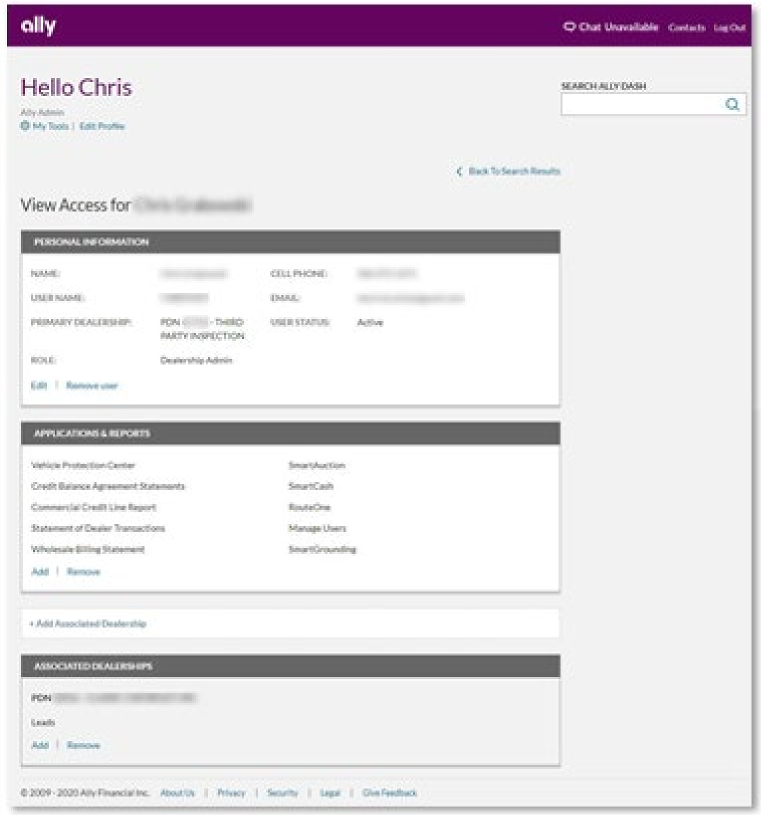


Modifying User Access

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



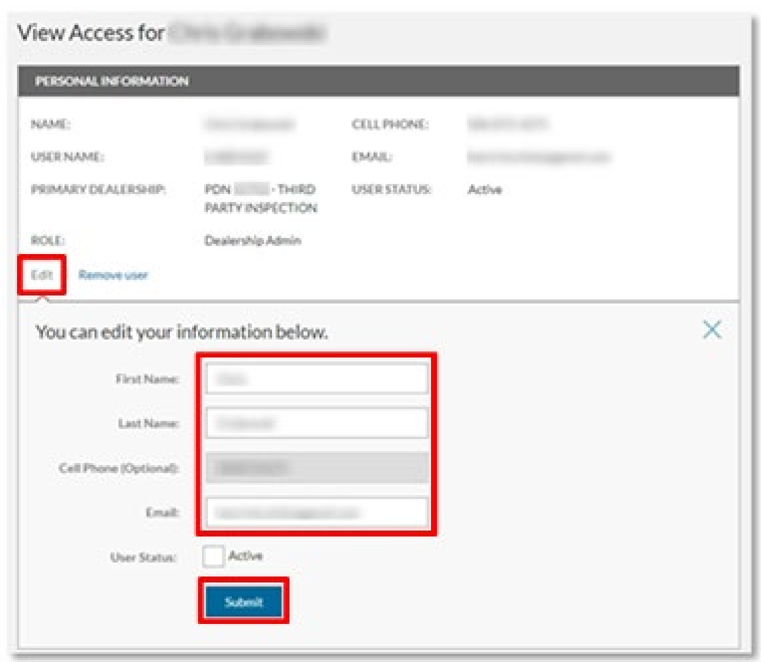
Edit Personal Information

Click **Edit.**

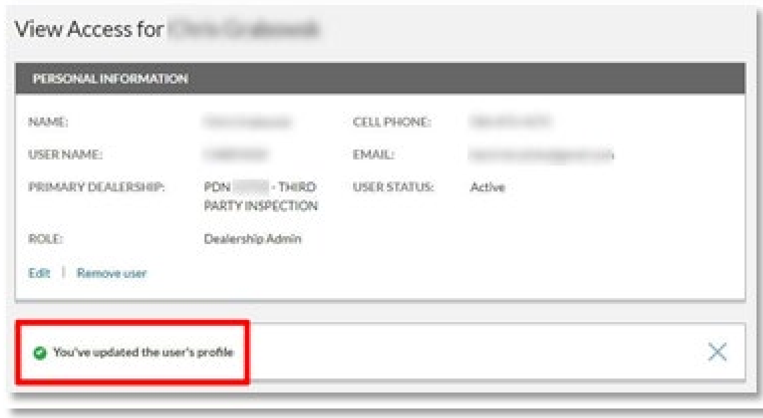
Dealer Admins can edit a user's information by typing in the boxes displayed.

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**.



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

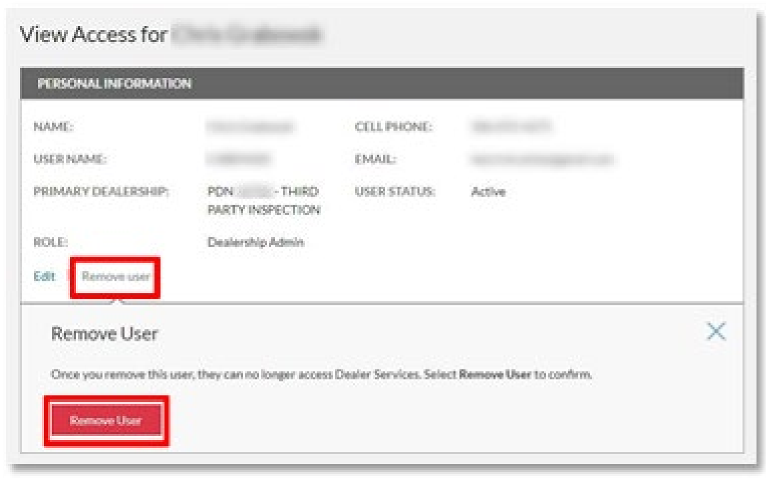


Remove User

Click **Remove User** tab.

A message will display asking to confirm the action.

Click **Remove User** button to confirm.

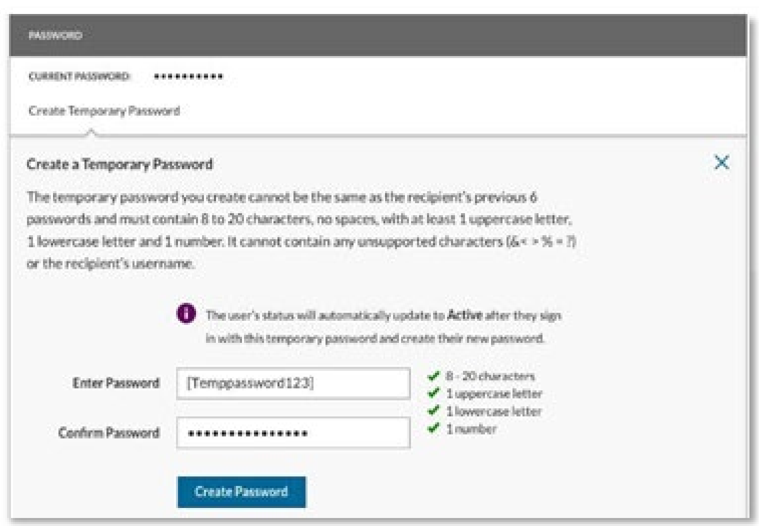


Create Temporary Password

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.



A confirmation message appears advising a temporary password was created.

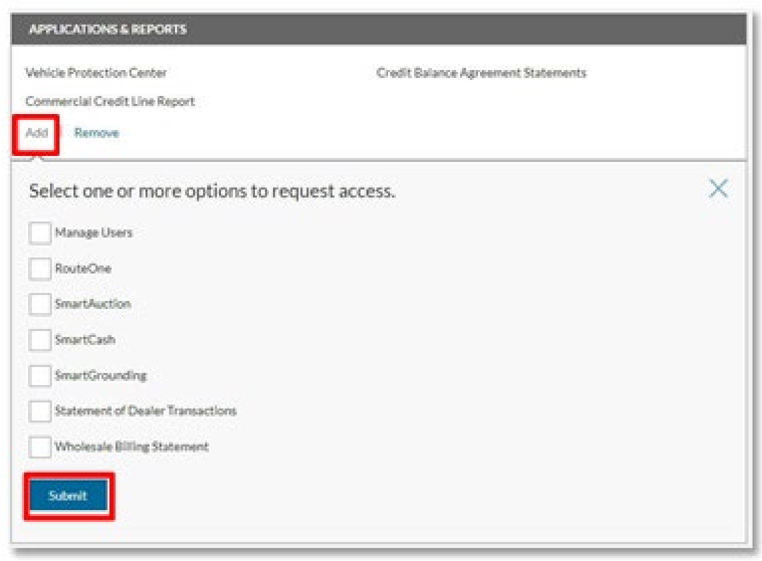
Add Application(s) or Report(s)

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.



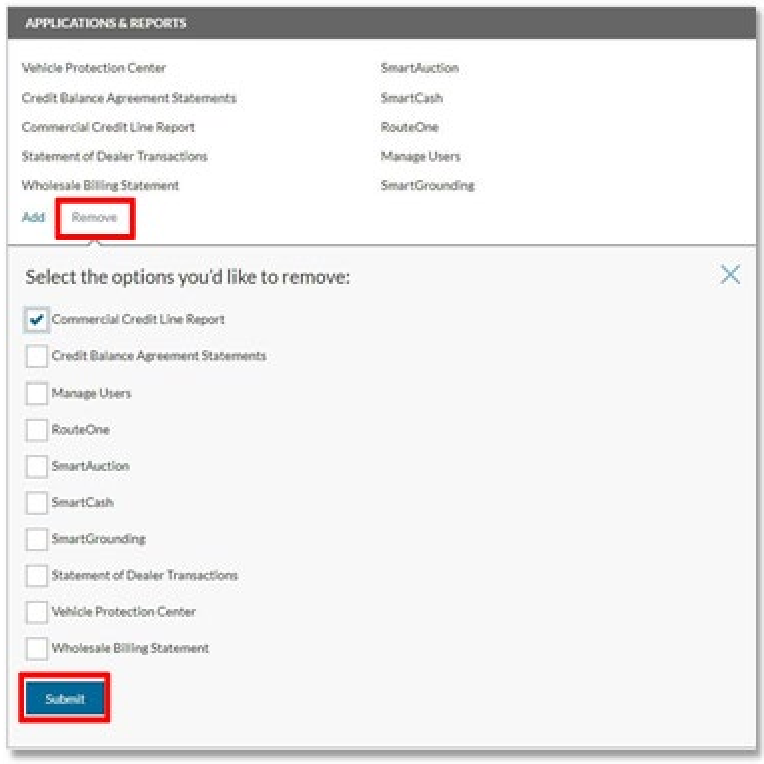
A confirmation message appears advising the Application(s) and/or Report(s) were added.

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.

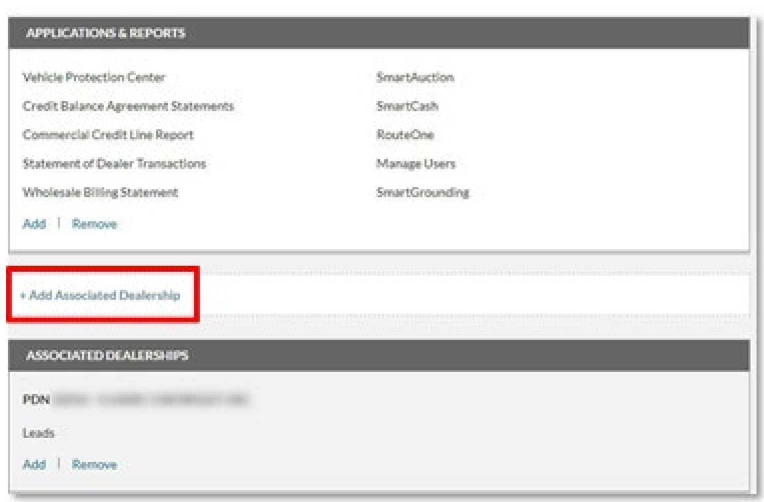
Click **Submit**.



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

Add Associated Dealership(s)

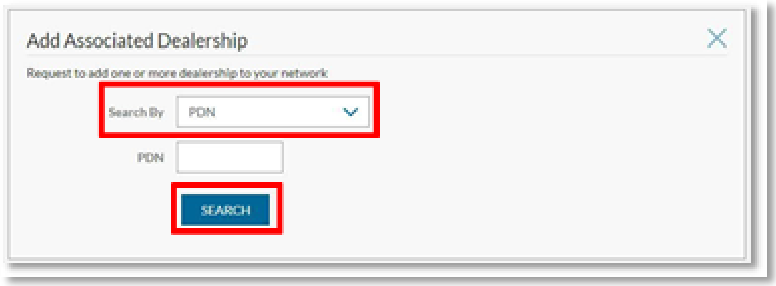
Click **Add Associated Dealership**.



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

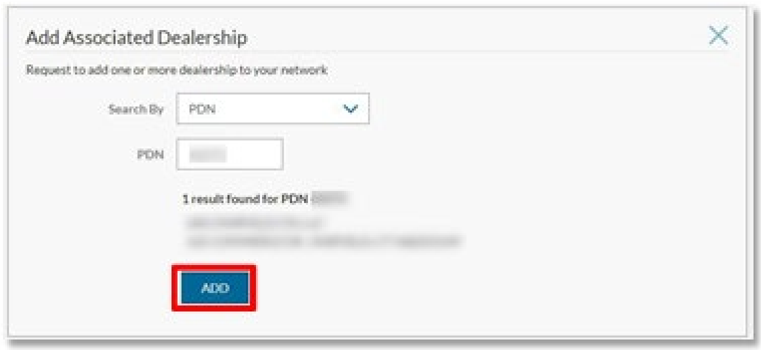
Enter the PDN or Dealership name/state into the appropriate fields.

Click **Search**.



Click **Add**.

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

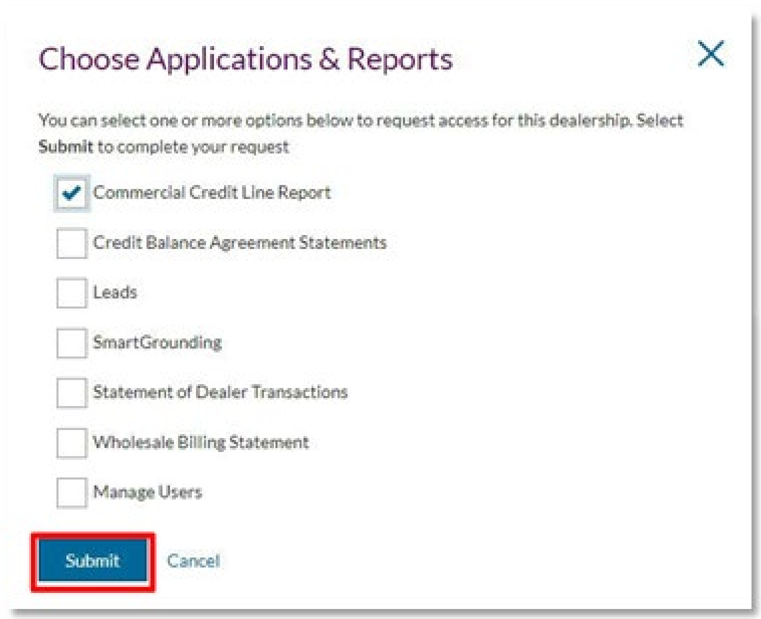


Choose the desired applications and reports for the Associated Dealership.

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



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

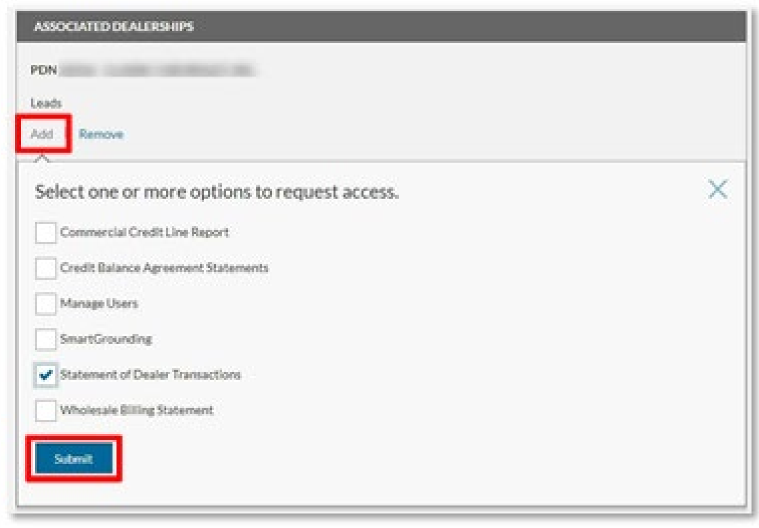
Click **Add**.

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



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

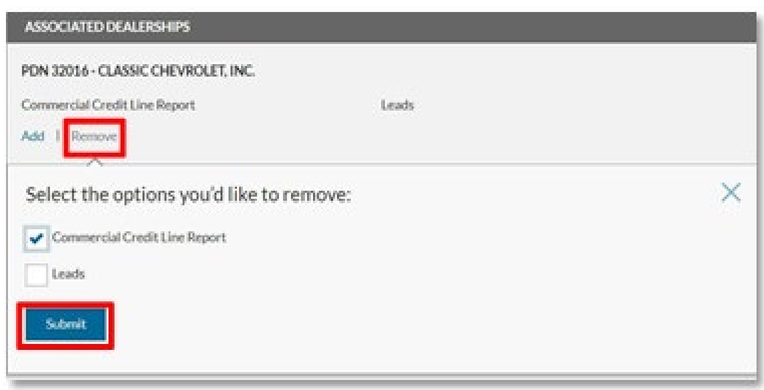
Click **Remove**.

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



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