ADMINISTRATIVE SERVICES
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General Information

Welcome to Dealer Administrative Services. This site was created to enable authorized Administrators and Processors from Motor Vehicle Dealerships to complete various administrative services on a secure system.

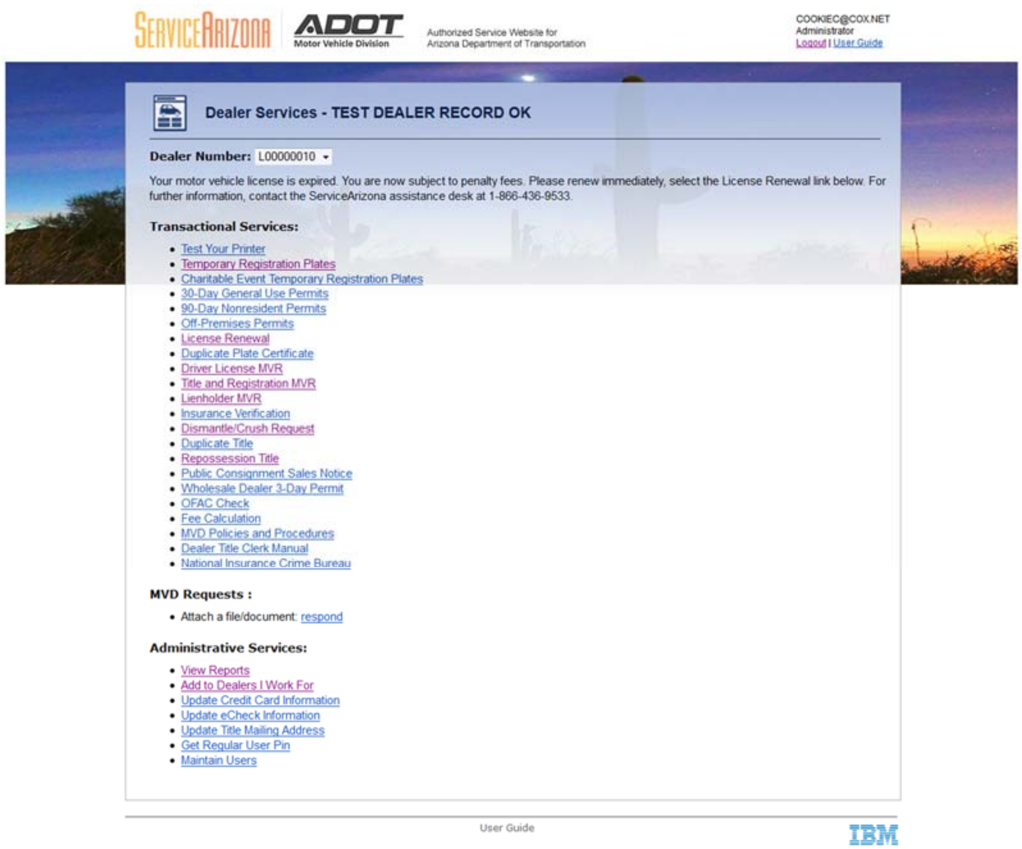
This site will provide multiple benefits such as:

- Provide a quicker and easier method for Administrators to view reports
- When applicable, a Processor or Administrator can add themselves to other Motor Vehicle Dealers they work for
- Update Credit Card and eCheck information
- Get a Regular User's Pin
- Maintain Users
- Grant service access to Processors or Administrators

Note: Many processors will not be able to complete all services and should see their administrator for assistance.

The following instructions serve as a step-by-step guide through each of the Administrative Services processes.

Dealer Services Home Page



The Dealer Services Home Page contains four sections.

The sections are:

1. Dealer Name
2. Dealer Number
3. Transactional Services
4. Administrative Services

Note: Not all Users will see every option displayed above on the Home Page. What displays will depend upon the access level the User was granted.

Dealer Services Home Page – Continued

The Dealer Services Home Page defined:

Dealer Name

The first section displays the name of the Motor Vehicle Dealer for which the processor is working.

Dealer Number

The second section contains the Motor Vehicle Dealer number. If a processor works for multiple Motor Vehicle Dealers, he/she will need to use the drop down box to indicate the Motor Vehicle Dealer number for the subsequent requests.

Transactional Services

The third section allows the User to select the desired service transaction, e.g. **Duplicate Title**, by clicking on the link to begin the Duplicate Title process.

Administrative Services

The fourth section allows the User to select the desired administrative functions for the Motor Vehicle Dealer, e.g. **View Reports** and **Maintain Users**.

View Reports

There are four types of reports: Activity Report, User Audit Report, Summary Report, and TRP Expiration Warning Report.

To view instructions for a desired report, go to the designated page number below:

- The Activity Report, continue with the steps below
- The User Audit Report, go forward to page **7**
- The Summary Report, go forward to page **9**
- The TRP Expiration Warning Report, go forward to page **10**

<u>Activity Report</u>

1. From the Dealer Services Home Page, click the **View Reports** link to proceed.

Choose a Report Type to View

2. The screen will default to the **Activity Report**; click the **Continue** button to proceed.

Choose a Service to View

3. Click the link for the desired service (e.g. Duplicate Title, Lienholder MVR, etc.) to proceed.

Enter Criteria to View Report

4. The **Start Date** field will default to the current date. For a different date, click the **Start Date** field to activate and change the date.

5. The **End Date** field will default to the current date. For a different date, click the **End Date** field to activate and change the date.

6. Reports will sort automatically after clicking on one of the following buttons, under the **Sort By** field:
   - **Transaction Date:** is used to sort by the date a transaction was processed, with the most current date at the top of the page
   - **User ID**: is used to sort by the **User ID Number**. This type of report will show activity by user
   - **Permit Number:** (Only for the reports where a permit is issued) is used to show the permit number assigned by transaction from the most current permit issued

7. Click **Submit** to proceed.

View Reports – Continued

<u>Activity Report Review</u>

8. If a record was found, an Activity Report will display. See the specific user guide for details on the report contents for the desired service.

Note: If a record was not found, the original information entered as the search criteria will appear.

9. To print, select the **File** option located on the menu bar. From the drop down menu, select the **Print** option. A dialog box will appear. Click the **Print** button to print the report.

Note: Paper size may require changing to landscape using page setup.

10. Click one of the following links:
    - **Back to Reports** to return to the **Choose a Report Type to View** screen to select a different report

      Or

    - **Back to Home Page** to return to the **Dealer Services Home Page**

View Reports – Continued

<u>User Audit Report</u>

1. From the Dealer Services Home Page, click the **View Reports** link to proceed.

Choose a Report Type to View

2. Click the **drop down arrow** to select the **User Audit Report** option; click the **Continue** button to proceed.

Enter Criteria to View Report

3. The **Start Date** field will default to the current date. For a different date, click the **Start Date** field to type in a new date.

4. The **End Date** field will default to the current date. For a different date, click the **End Date** field to type in a new date.

5. The **Action** field will default to the **All** option, however, there are other options available. Click the **drop down arrow** to retrieve any one of the following:
   - **Register** - when a User is registered for the application under the Motor Vehicle Dealer
   - **Remove User** - when an Administrator removes a user from the Motor Vehicle Dealer in "Maintain Users"
   - **Add Service** - when a User is granted access to a service in "Service Access"
   - **Delete Service** - when a Users' access to a service is deleted in "Service Access"
   - **Change Role** - when a Users' role is changed between Processor and Administrator
   - **All** - any of the above

6. Reports can be sorted automatically by clicking one of the following criteria buttons, under the **Sort By** field:
   - **Date** is used to sort by the date a transaction was processed, with the most current date at the top of the page.
   - **User ID Affected** is used to sort by the **User ID Number**. This type of report will show productivity by User.

7. Click **Submit** to proceed.

View Reports – Continued

User Audit Reports

8. A User Audit Report will show the following information:
    - Motor Vehicle Dealer Name and the selected transaction start and end dates
    - Date
    - Time
    - User ID Affected
    - Action
    - Action Description
    - User ID Responsible

9. To print, select **File**. From the **drop down menu**, select the **Print** option. A dialog box will appear. Click the **Print** button to print the report.

10. Click one of the following links:
    - **Back to Reports** to return to the **Choose a Report Type to View** screen to select a different report

      Or

    - **Back to Home Page** to return to the Dealer Services Home Page

View Reports – Continued

<u>Summary Report</u>

1. From the Dealer Services Home Page, click the **View Reports** link to proceed.

Choose a Report Type to View

2. Click the drop down arrow to select the **Summary Report** option; click the **Continue** button to proceed.

Choose a Service to View

3. Click the link for the desired service (e.g. Duplicate Title, Lienholder MVR, etc.) to proceed.

4. The **Date** field will default to the current month and year. For a different date, click the **Date** field to activate and type in a new date. The date must be entered by a two-digit month and four-digit year, e.g. 02 / 2009.

5. Click **Submit** to proceed.

Summary Report Review

6. A Summary Report will appear on the screen displaying the company name along with the desired month and year of transactions being displayed. Other information specific to the service will also display. See the individual service user guide for details on the report contents.

7. To print, select **File** and from the **drop down menu** select the **Print** option. A dialog box will appear. Click the **Print** button to print the report.

8. Click one of the following links:
    - **Back to Reports** to return to the **Choose a Report Type to View** screen to select a different report

      Or

    - **Back to Home Page** to return to the Dealer Services Home Page

View Reports – Continued

<u>TRP Expiration Warning Report</u>

This report will provide information on TRPs that will expire within 10 days and have not grown up into a Title and Registration record.

Note: TRPs will **NOT** display on this report when there is an existing vehicle record on the MVD database and a transaction update has been completed within the vehicle base record after the TRP issue date. Example: TRP was issued on 04-01-07 and a Motor Vehicle Dealer has requested a duplicate title on 04-05-07.

1. From the Dealer Services Home Page, click the **View Reports** link.

<u>Choose a Report Type to View</u>

2. Click the **drop down arrow** to select the **TRP Expiration Warning Report option**; click the **Continue** button to proceed.

Enter Criteria to View Report

3. The **Start Date** field will default to the current date. If a different date is desired, click the **Start Date** field to change the date.

4. The **End Date** field will default to 10 days in the future. If a different date is desired, click the **End Date** field to change the date.

Note: The **TRP Expiration Warning Report** can be obtained by a Motor Vehicle Dealer or title service company for the current date, up through 10 days in the future**.** A future report for more than 10 days may not be requested.

5. Reports can be sorted automatically by clicking one of the following criteria buttons, under the **Sort By** field:
   - **Expiration Date** is used to sort by the oldest date to the newest date.
   - **Permit Number** is used to sort by the smallest to the largest TRP Number.

6. Click **Submit** to proceed.

TRP Expiration Warning Report - Continued

TRP Expiration Warning Report

7. A TRP Expiration Warning Report will show the following information:
    - The Motor Vehicle Dealership Name and desired dates of information being displayed
    - TRP Expiration Date
    - TRP Number
    - Customer 1's Full Name
    - VIN

8. To print, select **File** and from the **drop down menu**, select the **Print** option, a print dialog box will appear, click the **Print** button to print the report.

9. Click one of the following links:
    - **Back to Reports** to return to the **Choose a Report Type to View** screen to select a different report

      Or

    - **Back to Home Page** to return to the Dealer Services Home Page

Add To Dealers I Work For

This process must be performed prior to processing any transaction for a **NEW** Motor Vehicle Dealer.

1. From the Dealer Services Home Page**,** click the **Add to Dealers I Work For** link.

Enter Information of Dealers to Be Added

2. Type in the New Motor Vehicle Dealer Number of the Motor Vehicle Dealership or Title Services Company where you are authorized to process transactions.

3. Type in the PIN Number of the Motor Vehicle Dealership or Title Services Company to be added. You can obtain the number from the Motor Vehicle Dealer Services Administrator at the new location.

4. Click the **Add Dealer** button to add this Motor Vehicle Dealer.

5. A **confirmation page** will return and display updated information. Verify that the new Motor Vehicle Dealer number and name are correct. Click the **Back to the Dealer Services Home** link to return to the Dealer Services Home Page to start the issuance process.

Note: The next time you access the Dealer Services Home Page, a **drop down box** will appear with a list of Motor Vehicle Dealerships or Title Service Companies you are authorized to work with.

Update Credit Card Information – <u>Administrator Only</u>

<u>Add or Change A Credit Card</u>

1. From the Dealer Services Home Page, click the **Update Credit Card Information** link.

Enter Dealer Credit Card Information

The current credit card number and expiration date on file will display above the credit card number field. The credit card number will display as X's, except for the last 4 digits.

2. Type in the entire **Credit Card Number** (no spaces).

3. Type in the **Expiration Date**. Using the MM/YY format, enter the two-digit month and the two-digit year, e.g. 12 / 10.

4. Click the **Update Credit Card Information** button to submit the information. The system will automatically verify if the card information entered is valid.

5. A **Confirmation Page** will return and display **"**The credit card information has been updated**".** Click the **Back to Dealer Services Home** link to return to Dealer Services Home Page.

<u>Delete a Credit Card</u>

1. From the Dealer Services Home Page, click the **Update Credit Card Information** link.

Enter Dealer Credit Card Information

2. The current credit card number and expiration date on file will display above the credit card number field. The protected credit card number will display as X's, except for the last 4 digits. **Verify this is the credit card to be deleted**.

3. Click the **Delete Credit Card Information** button to delete the information.

4. A **Confirmation Page** will return and display "The credit card information has been deleted". Click the **Back to Dealer Services Home** link to return to the Dealer Services Home Page.

Update eCheck Information – <u>Administrator Only</u>

<u>Add or Change an eCheck (checking) Account</u>

1. From the Dealer Services Home Page, click the **Update eCheck Information** link.

Enter Dealer Checking Account Information

2. Type in the entire **Checking Account Number** without spaces.

3. Type in the entire **Checking Account Routing Number.** Usually, located on the bottom of the check.

4. Type in the Motor Vehicle Dealers' **Daytime Phone Number and Extension**, if applicable.

5. Type in the complete **Billing Address**, which displays at the top of the check, in the billing address Line 1 box. The **Billing Address** line 2 box is a continuation of **Address Line** 1 box in case the billing address is too long for the first address box. Continue typing in the city, state and zip code in the appropriate boxes.

6. Click the **Update eCheck Information** button to submit this information. The system will automatically verify if the checking account information entered is valid.

7. A **Confirmation Page** will return and display "The checking account information has been updated". Click the **Back to Dealer Services Home** link to return to the Dealer Services Home Page.

<u>Delete an eCheck (checking) Account</u>

8. From the Dealer Services Home Page, click the **Update eCheck Information** link.

Enter Dealer Checking Account Information

9. The checking account information currently stored in the system will automatically appear (last 4 digits only). Verify this is the checking account number to be deleted.

10. Click the **Delete eCheck Information** button to delete the information.

11. A **Confirmation Page** will return and display "The checking account information has been deleted". Click the **Back to Dealer Services Home** link to return to the Dealer Services Home Page.

Update Title Mailing Address – <u>Administrator Only</u>

ServiceArizona allows Motor Vehicle Dealers to store a mailing address for titles that are processed. This does not affect the mailing address on file with the Motor Vehicle Division Dealer Licensing Unit.

1. From the Dealer Services Home Page, click the **Update Title Mailing Address** link.

Enter Title Mailing Address

2. Type in the **Name** of the person or company receiving the Title.

3. Type in the **Mailing Address** of where you want to receive the Title.

4. Type in the **City, State** and **Zip** code of where you want to receive the Title.

5. Click the **Update Mailing Address** button to submit this information.

Get Regular User Pin – Administrator Only

1. From the Dealer Services Home Page click the **Get Regular User PIN** link.

PIN Information

2. **Write Down** the Motor Vehicle Dealer Name/Number and Processor PIN Numbers. The Pin Number can be changed at any time by clicking on the **Generate New PIN** link.

3. Click the **Back to Dealer Services Home** link to return to the **Dealer Services Home Page.**

Maintain Users of the System - <u>Administrator Only</u>

Assign roles to the registered users, add/delete users and grant/remove service access to users under the **Maintain Users** heading.

1. From the Dealer Services Home Page click the **Maintain Users** link.

Maintain Users

The screen will appear with all processors and administrators registered under the Motor Vehicle Dealer Number in Dealer Services along with check boxes showing the services each user may access. When necessary, use this screen to remove a processor and/or administrator or to add/delete access to services for a user.

<u>Remove a processor and/or administrator</u>

2. Under the **Remove** column, click the radio button next to the processor and/or administrator to be removed.

3. Click the **Update** button to accept the removal of the processor. The screen will then reload and the removed user will no longer show on the list of users.

4. Click the **Go Back** button to return to the Dealer Services Home Page.

Note: Removing a processor and/or administrator from one authorized Motor Vehicle Dealer does not automatically remove them from all Motor Vehicle Dealers. You must repeat these steps for each Motor Vehicle Dealer number.

<u>Grant/Remove service access for a user</u>

5. An Administrator may add services by checking the box or delete services by un-checking the box under that service.

6. Click the **Update** button to complete the updates.

7. Click the **Go Back** button to return to the Dealer Services Home Page