Integration Manager

User Guide

INTRODUCTION

This booklet is the user guide for the Integration Manager software created by CU*Answers Software Integrations.

The CU*Answers Integration Manager is a self-service portal for credit unions to manage certain aspects of their integrated systems. One of the most popular uses for this system is to manage the dealer relationships that CUs have with integrated partners like RouteOne and DealerTrack.

Contact the CU*Answers Software Integrations team (CSI) at integrations@cuanswers.com.

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Revision date: August 4, 2020

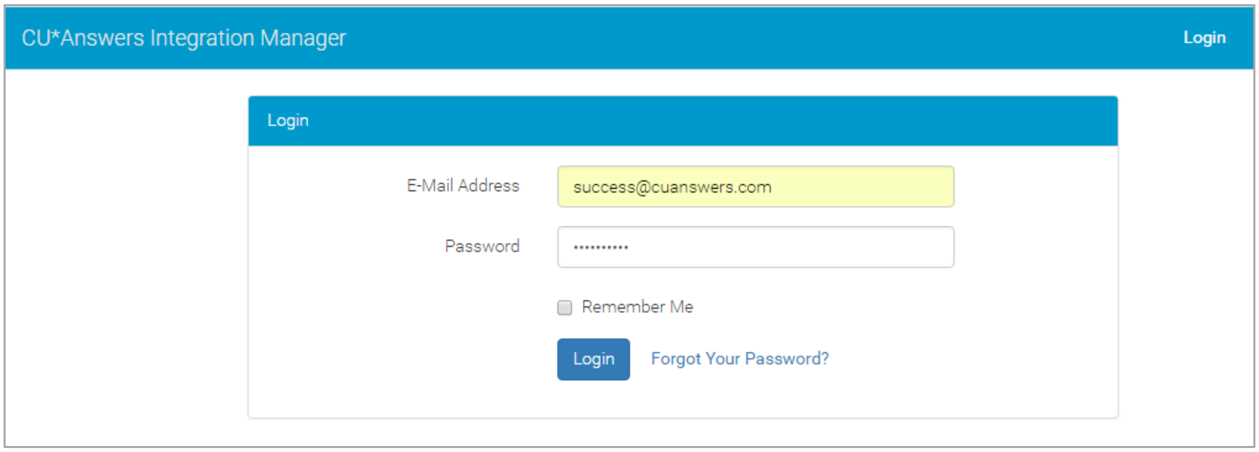
For an updated copy of this booklet, check out the Reference Materials page of our website:
https://www.cuanswers.com/resources/doc/cubase-reference/

ACCESSING INTEGRATION MANAGER

LOGGING INTO INTEGRATION MANAGER

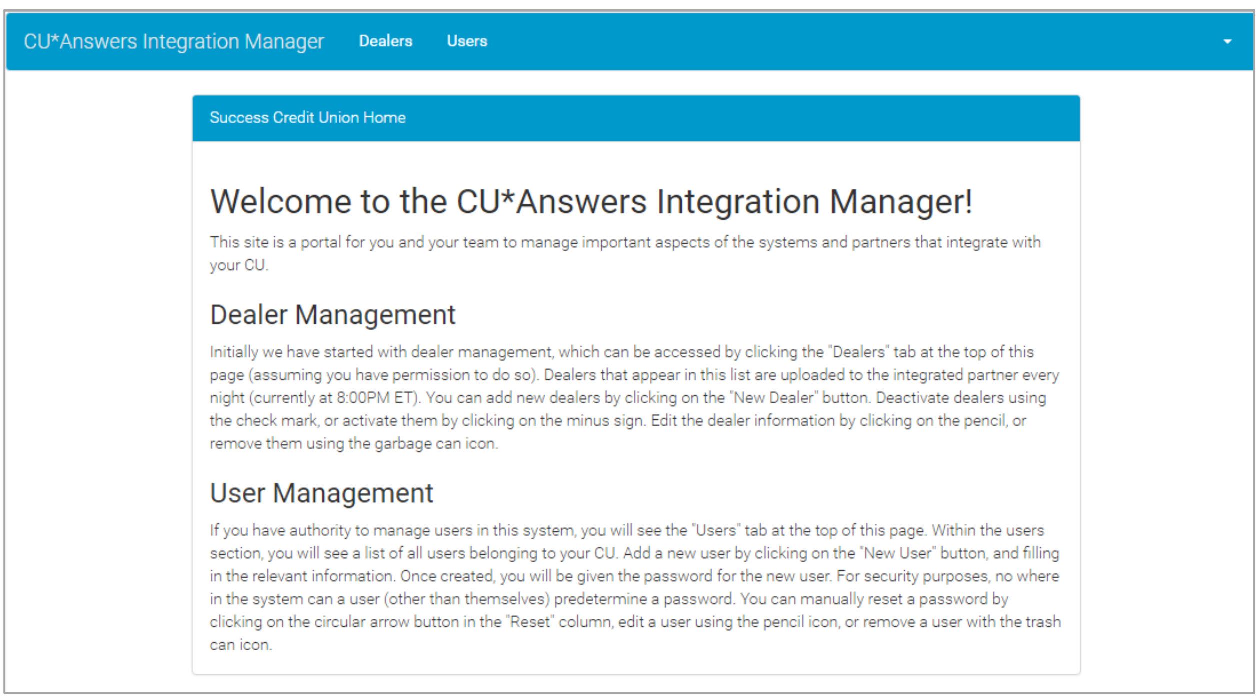
Access the Integration Manager login screen at: https://integrations.cuanswers.com/

Login Screen



Enter your email address and password. The Integrations Team will provide your initial password. Once you've successfully logged into the site, you will be presented with the initial welcome window.

Logged In Successfully

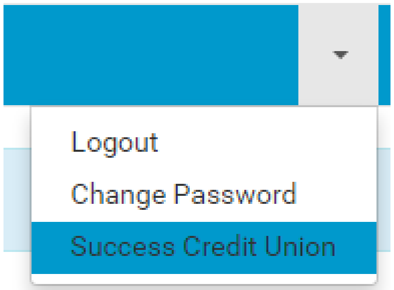


Changing Your Password

You will use this process after your first login and any time you need to change your password.

To change your password click on the small arrow in the top right corner of the screen. When the dropdown appears, click “Change Password.”

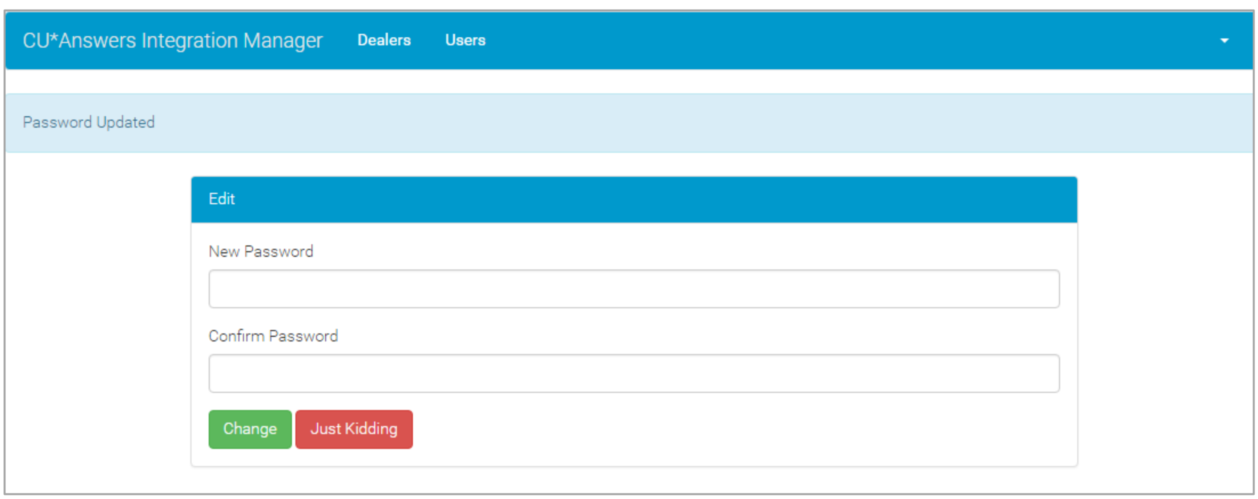
Selecting Change Password



Passwords must include the following:

- At least six characters
- At least one upper case letter
- At least one lower case letter
- At least one number

Password Change Screen



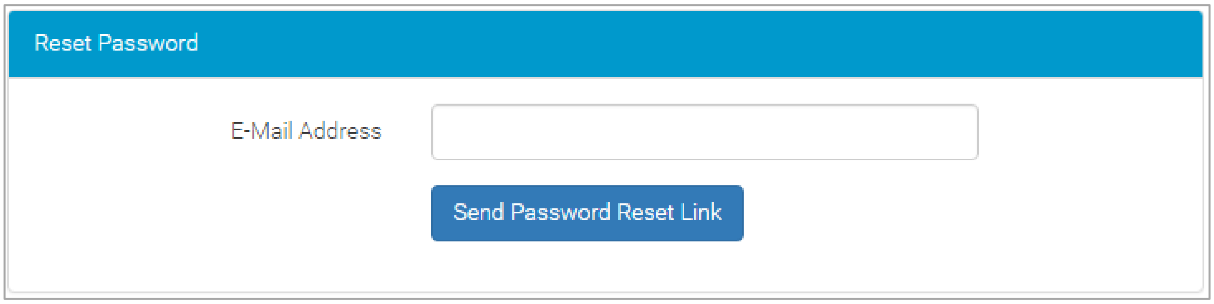
On this screen, type your new password in the boxes and click “Change.”

After you have successfully change your password, you will receive a “Password Updated” message at the top of the screen.

Forgot Your Password Feature

If you have forgotten your password, you may click the "Forgot Your Password?" button on the login screen and enter your email address on the screen shown below.

Reset Password Page

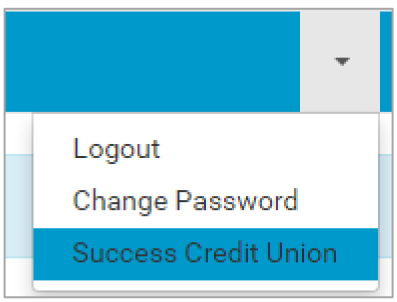


Click "Send Password Reset Link" and an email will be sent to you allowing you to reset your password.

Logging out of Integration Manager

To log out of the Integration Manager system, click the arrow in the top right corner of the screen, and select "Logout" from the menu.

Selecting Logout



Managing Users

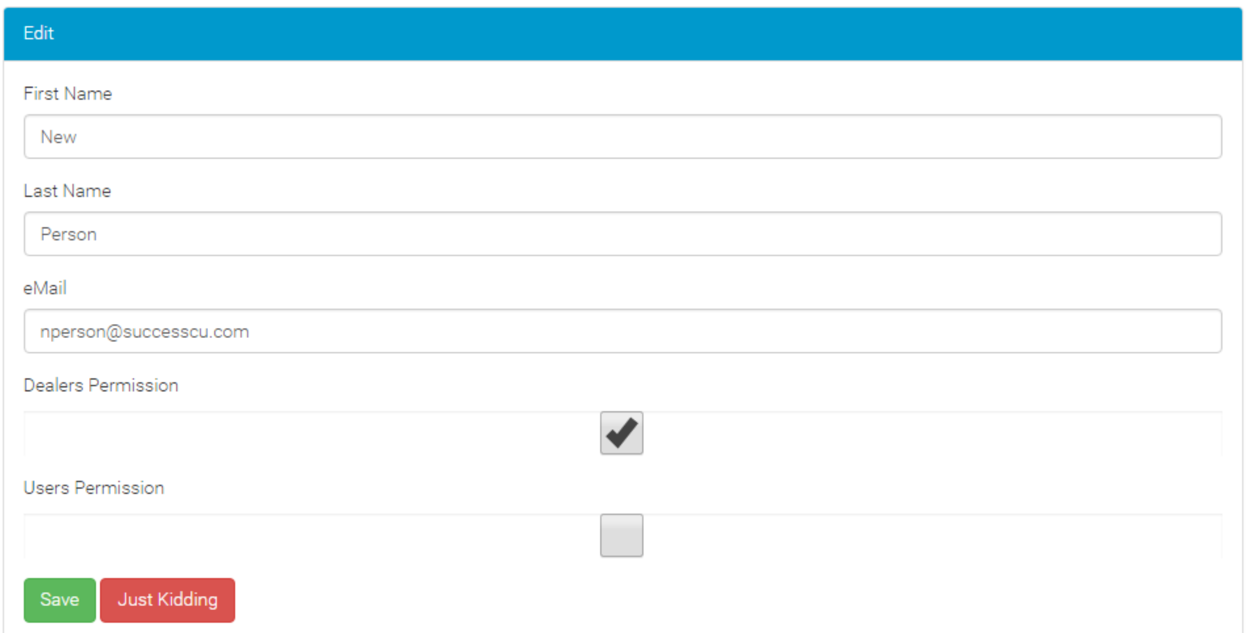
If you have permission to manage users for your CU, you will see the "Users" tab at the top of the screen. Clicking on that tab will display the list of users that you have permission to modify.

Adding a User

To add a new user to the system, click the green "New User" button at the top of the screen. Enter the new user's information in the provided fields and check the box next to each function that you want that user to be able to perform.

The screen below sets up a new user. Checking "Dealer Permission" gives this user the ability to modify dealers.

New User Set Up

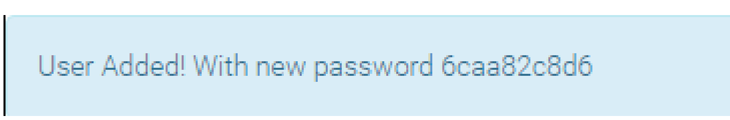


Once you've entered all of the necessary information, click "Save" to add the user.

- **Note:** It is important to confirm the email address entered is a valid email. This email address is used to access the system and for the password reset emails.

Once the user has been successfully added, a message at the top of the screen will confirm the user was successfully created. It will also list the user's temporary password.

User Addition Confirmation and Temporary Password Message



Removing a User

There here are three icons that allow you to perform different functions for the user. To remove the user from the system, click the trash can icon next to the user.

You will be asked to verify your selection. Click "Do it!" to remove the user from the system.

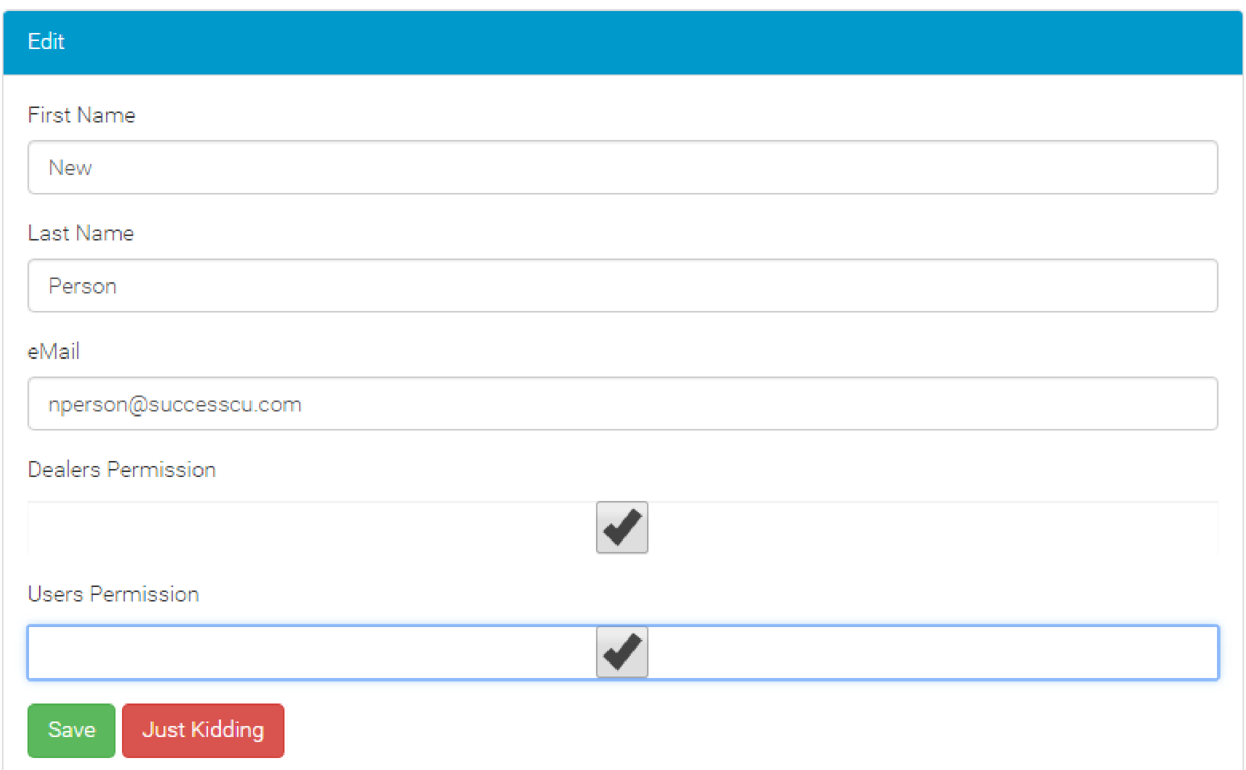
Removing a User Confirmation

Editing a User

Use the pencil icon to the right of the user to edit the user information. This includes the name, email address, and permission level for the site.

If you would like to add or remove permissions from a user, check the box next to the permission that you'd like to add or remove.

The image below grants the User Permissions to the New Person user shown earlier in this document.



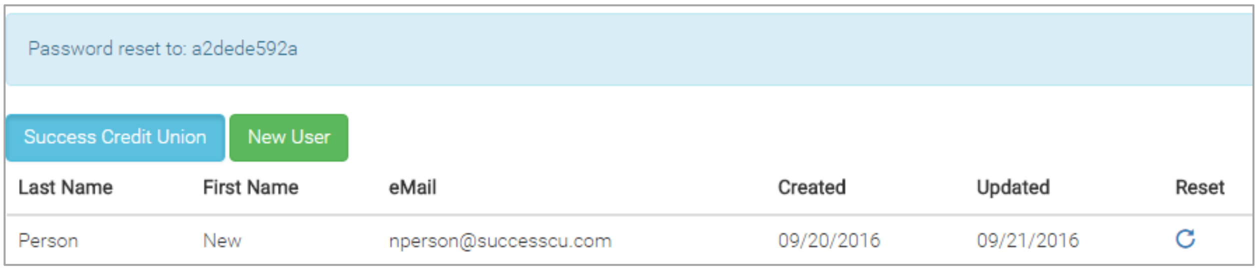
Once you have made changes to the Edit screen, click "Save." You will then be redirected to the previous screen with a success message indicating that your changes have been made.

RESETTING USER PASSWORDS

- **Note: It is recommended that the user clicks the "Forgot Your Password?" link on the login screen to reset their own password.**

In cases where the Reset Password feature cannot be used, follow the directions below.

To manually reset a user's password, click the circular arrow next to the user under "Reset." You will be presented with a confirmation message that will include the user's new password.



MANAGING DEALERS

If your credit union works with RouteOne or DealerTrack, you must maintain your dealer list in the Integration Manager system. Dealers not in this list cannot submit applications to your credit union.

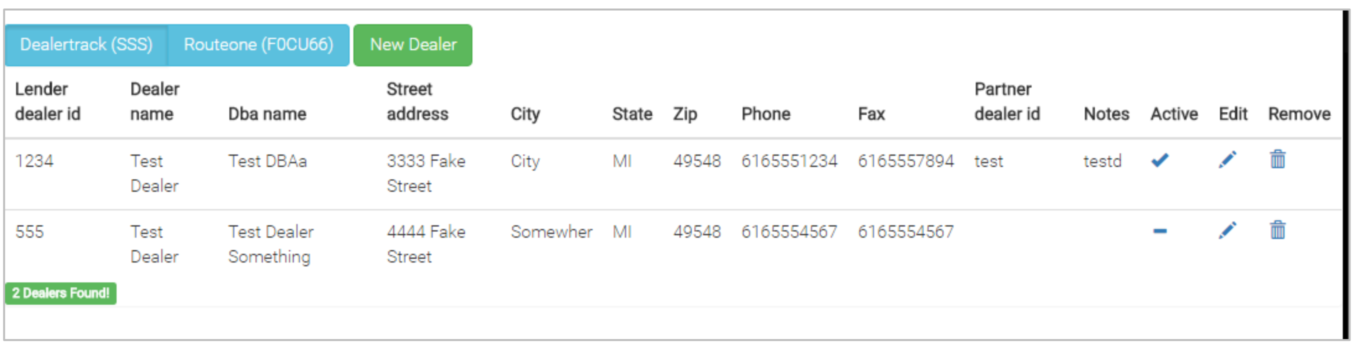
- **Note:** Dealers **must** also be configured in CU*BASE. You will use the CU*BASE dealer ID when interacting with dealers.

Every night the dealers are sent a dealer list and must match their dealer identifier to your CU*BASE dealer ID. This process controls dealer activation and ensures that applications route to the proper CU*BASE dealer.

VIEWING THE DEALER LIST

In order to view the list of dealers available to your credit union, click the "Dealers" tab at the top of the screen.

If your CU has integrations with multiple partners (DealerTrack and RouteOne), you will see buttons at the top left corner allowing you to filter your dealers for each integration.


Dealertrack (SSS) | Routeone (F0CU66) | New Dealer

Lender dealer id	Dealer name	Dba name	Street address	City	State	Zip	Phone	Fax	Partner dealer id	Notes	Active	Edit	Remove
1234	Test Dealer	Test DBAa	3333 Fake Street	City	MI	49548	6165551234	6165557894	test	testd			
555	Test Dealer	Test Dealer Something	4444 Fake Street	Somewher	MI	49548	6165554567	6165554567					

2 Dealers Found!

Adding a New Dealer

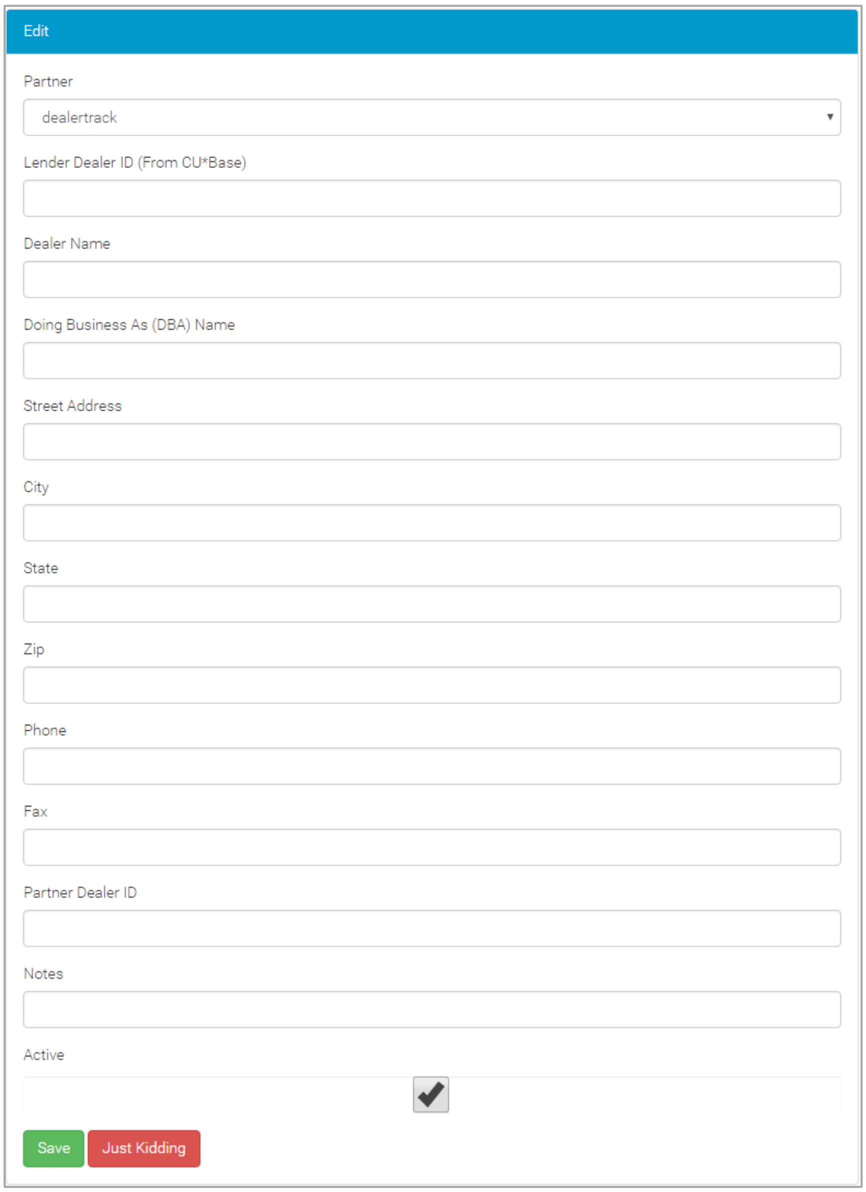
On the Dealers screen, click the “New Dealer” button to access the new dealer edit screen. (See previous page.)

Note: The “Partner” field will determine where this dealer is uploaded each night. It is critical that this dealer is created under the correct partner. Incorrect entries will result in failed communication between your credit union and the dealer.

- For example, in the example shown below “dealertrack” is selected for the “Partner” drop-down menu, indicating that this is a DealerTrack dealer.

- NOTE: If you create the dealer under the wrong partner, delete the dealer and recreate it under the correct one.

Adding a Dealer



Click “Save” when you’ve completed filling out the necessary information.

A descriptions of the fields above can be found on the following page. A filled in example is on page 11.

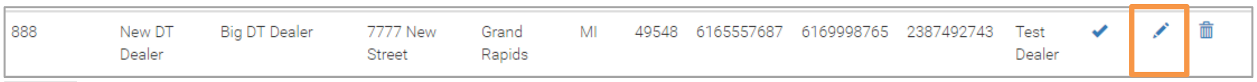
Explanation of Dealer Fields

Following is a brief explanation of each dealer field:

Field Name	Detail
Partner	Indicates which partner this dealer will be uploaded to each night.
Lender Dealer ID	Dealer ID in CU*BASE. **Note:** It is crucial that this match CU*BASE, or applications will not properly match the dealer in your system.
Dealer Name	Dealer legal name
DBA Name	Name that the dealer does business as. For example, Auto Acquisitions LLC might do business as Ralph's Chevrolet GMC.
Street Address	Dealer address
City	Dealer city
State	Dealer state (two characters)
Zip	Dealer ZIP code
Phone	Dealer phone number
Fax (Optional)	Dealer fax number
Partner Dealer ID (Optional)	Partner's ID for the dealer This field is for your records only. When dealers are uploaded to the partner, this is the ID the partner uses to match to your CU*BASE ID.
Notes (Optional)	Any notes that you would like to retain regarding this dealer.
Active	Indicates whether this dealer is active and will be uploaded. Typically this is checked when creating a new dealer.

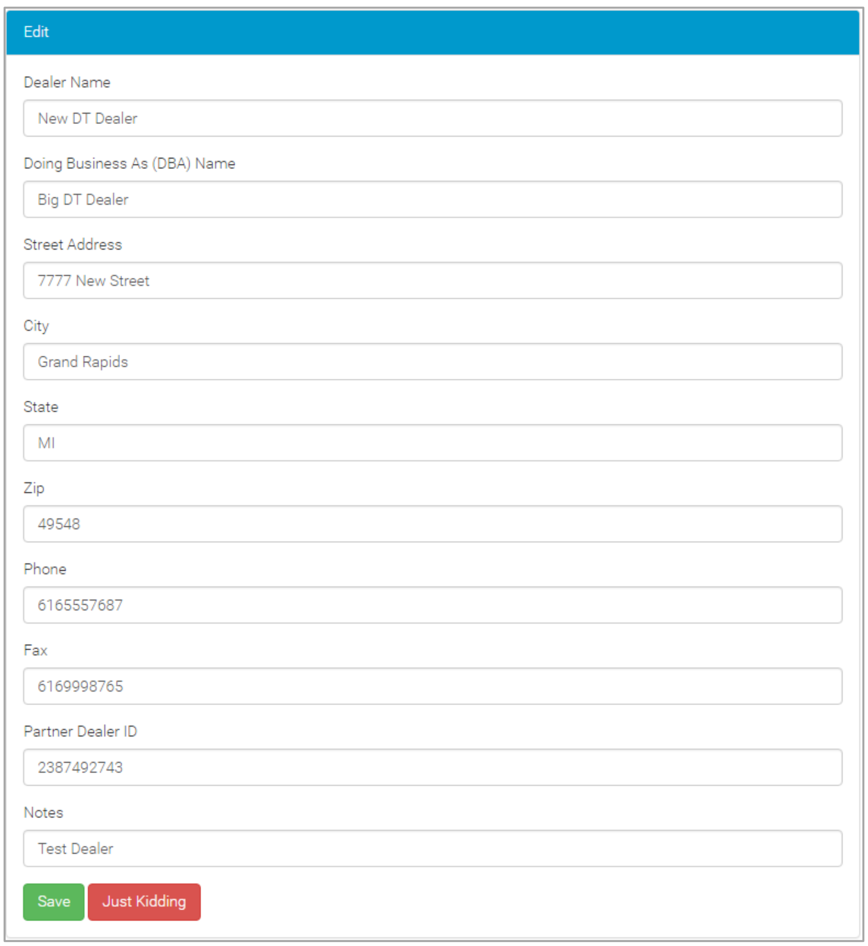
Editing a Dealer

Occasionally dealer information is entered incorrectly, or changes and requires editing. To edit a dealer, click the pencil icon to the right of the dealer that you would like to edit.



You will be presented with the edit screen to modify the dealer's information. Make the necessary changes to the dealer, and click "Save" when completed.

Editing a Dealer



- **Note:** Editing the "Lender Dealer ID" is not currently available. If you need to change the "Lender Dealer ID", delete and re-add the dealer.

- If you are making a large number of changes, or want to modify the "Lender Dealer ID" for an existing dealer, contact the integrated partner (DealerTrack or RouteOne) and make them aware of the change. Failure to do so may result in the matching process not being completed.

Activating/Deactivating a Dealer

If a situation arises where you would like to temporarily deactivate (or reactivate) a dealer, you can do so by clicking the checkmark next to the dealer you wish to deactivate. This function is commonly used if a dealer is continually sending less than desirable deals to your credit union, and you wish to temporarily block access until you can discuss the situation with them.

Example of an active dealer:

888	New DT Dealer	Big DT Dealer	7777 New Street	Grand Rapids	MI	49548	6165557687	6169998765	2387492743	Test Dealer	✔

Example of a deactivated dealer:

888	New DT Dealer	Big DT Dealer	7777 New Street	Grand Rapids	MI	49548	6165557687	6169998765	2387492743	Test Dealer	–

- **Note:** The dealer activation and deactivation will take place after the partner's matching process has completed. (This is typically 24-48 hours depending on the partner.)

Removing a Dealer

To remove a dealer form your dealer list, click the trash can icon to the right of the dealer.

888	New DT Dealer	Big DT Dealer	7777 New Street	Grand Rapids	MI	49548	6165557687	6169998765	2387492743	Test Dealer	✔	✎	🗑

You will receive a confirmation window. Click "Do it!" to complete the deletion.

Are you sure you'd like to delete this dealer?

Lender Dealer ID	Dealer Name	Dealer DBA Name
888	New DT Dealer	Big DT Dealer

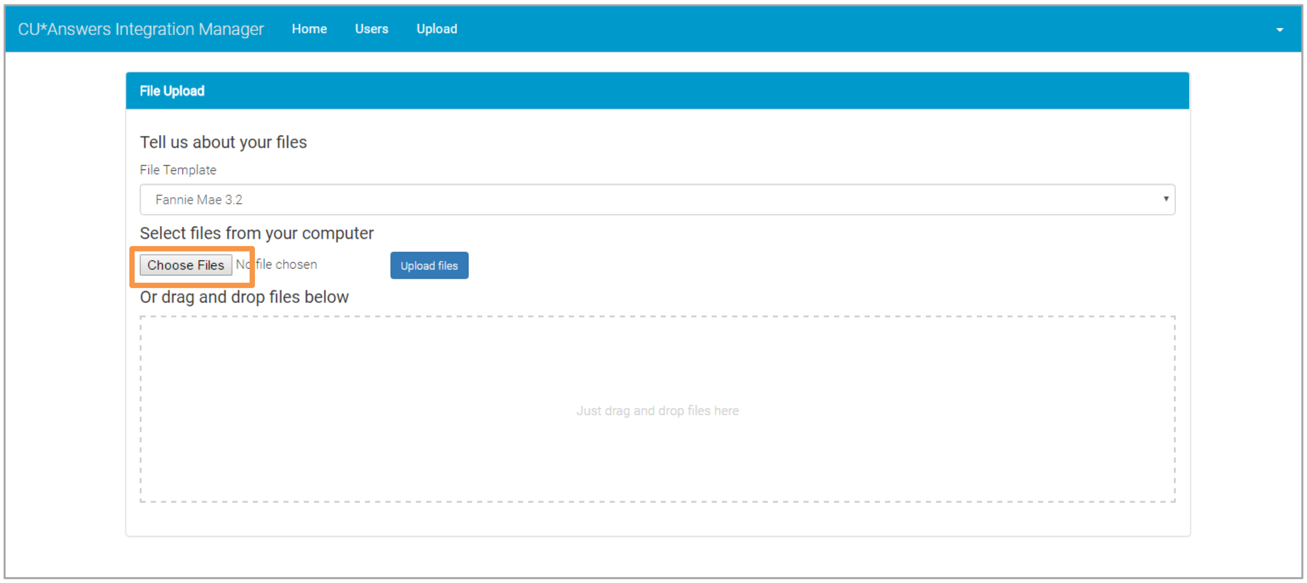
Do it! Just Kidding

- **Note:** This dealer will be removed from the nightly upload, and will be removed from the partner after their matching process has completed. (This is typically 24-48 hours depending on the partner.)

Uploading a File

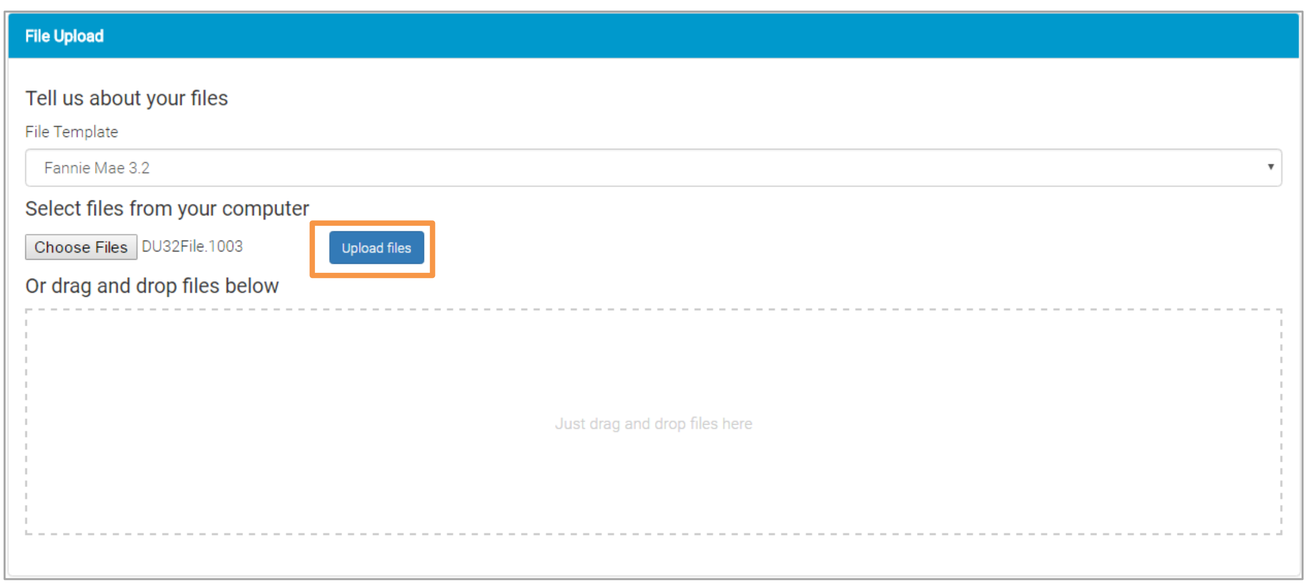
In order to upload a Fannie Mae file to your credit union, click the "Upload" tab at the top of the screen.

File Upload Screen



There are two ways you can upload the file. One method is to click "Choose Files" and navigate to the file.

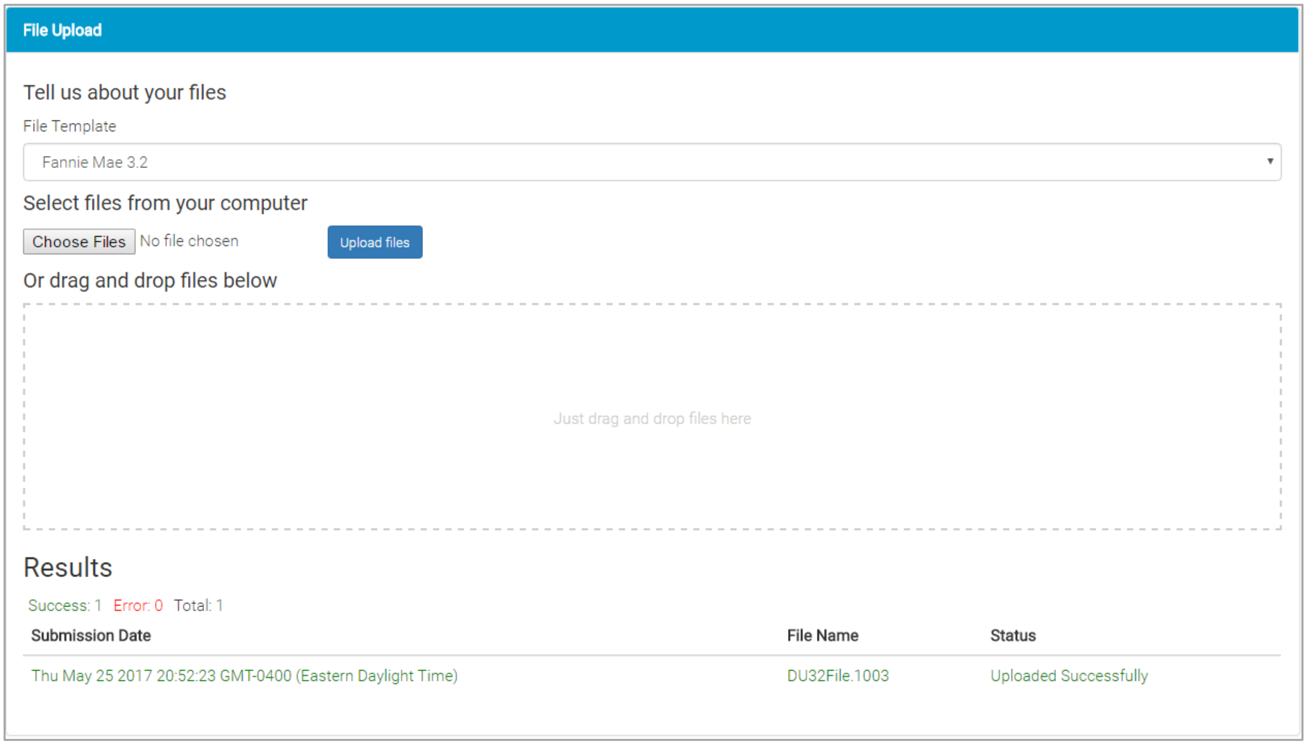
Selecting Choose Files



Then click "Upload File."

The other option is to drag and drop the file into the area under "Or drag and drop files below."

File Uploaded Successfully



Below is an example of what it looks like when a file fails validation after upload.

Failed Validation and Successful Upload