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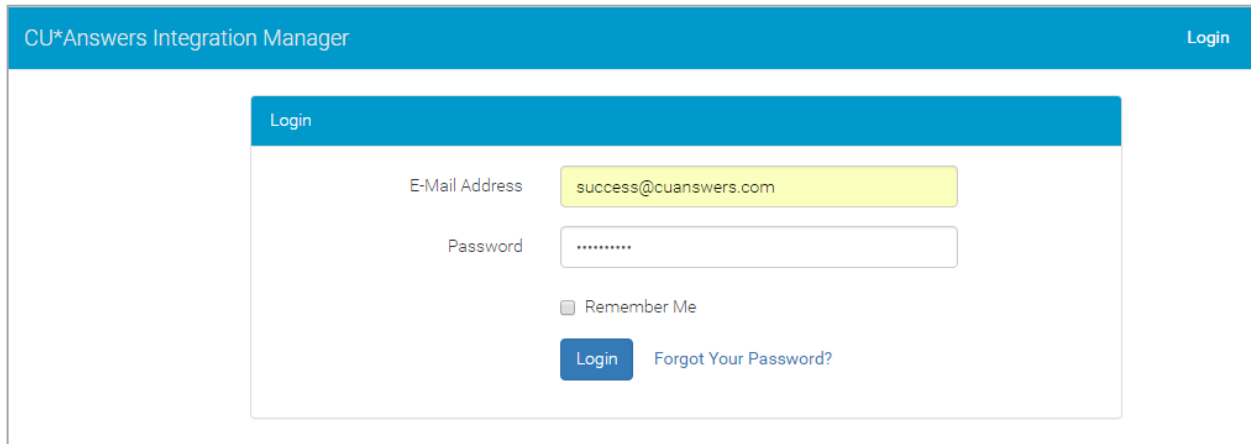
For an updated copy of this booklet, check out the Reference Materials page of our website:
<https://www.cuanswers.com/resources/doc/cubase-reference/>
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ACCESSING INTEGRATION MANAGER

LOGGING INTO INTEGRATION MANAGER

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

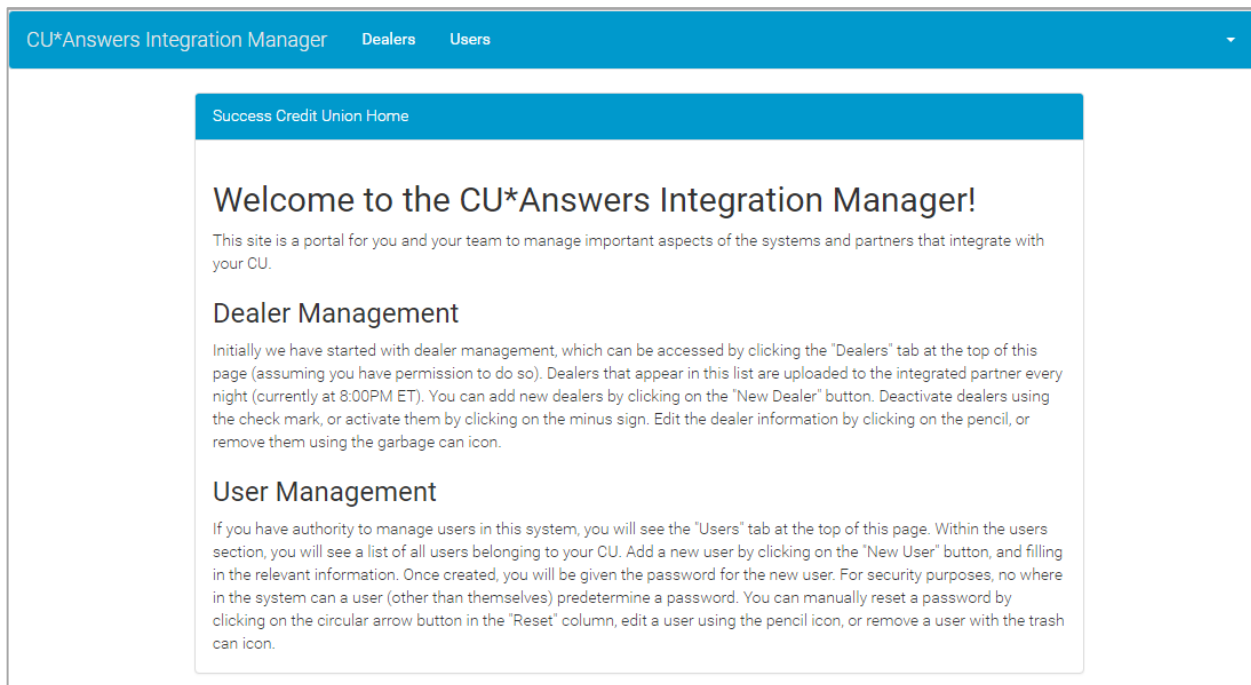
Login Screen



The screenshot shows the login interface for CU*Answers Integration Manager. At the top, there is a blue header with the text "CU*Answers Integration Manager" on the left and "Login" on the right. Below the header is a white box containing a "Login" form. The form has a blue header with the word "Login" in white. It includes two input fields: "E-Mail Address" with the value "success@cuanswers.com" and "Password" with masked characters ".....". Below the password field is a checkbox labeled "Remember Me" which is unchecked. At the bottom of the form are two buttons: a blue "Login" button and a "Forgot Your Password?" link.

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



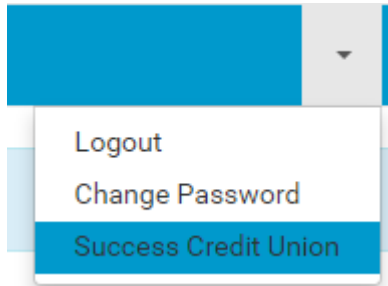
The screenshot shows the home page of the CU*Answers Integration Manager after a successful login. The top blue header contains "CU*Answers Integration Manager" on the left, and "Dealers" and "Users" in the center, with a dropdown arrow on the right. Below the header is a white box with a blue header that says "Success Credit Union Home". The main content area features a large heading "Welcome to the CU*Answers Integration Manager!" followed by a paragraph: "This site is a portal for you and your team to manage important aspects of the systems and partners that integrate with your CU." Below this are two sections: "Dealer Management" and "User Management", each with a paragraph of introductory text explaining the functionality of those sections.

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.”

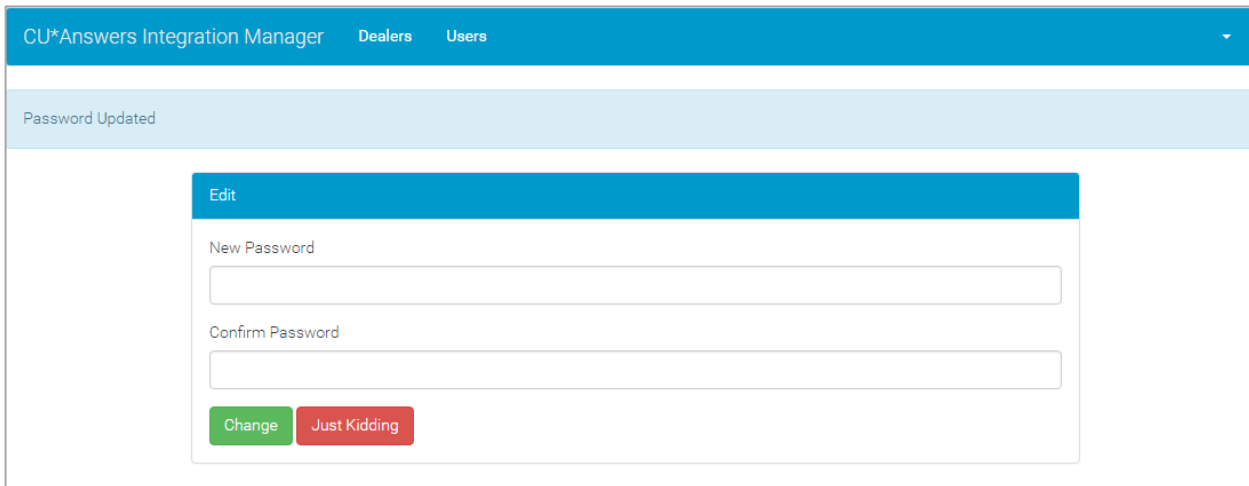
Selecting Change Password



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

A screenshot of the Password Change Screen. The screen has a blue header with the text "CU*Answers Integration Manager" and "Dealers Users" on the right. Below the header, there is a light blue banner that says "Password Updated". In the center, there is a white box with a blue header that says "Edit". Inside this box, there are two text input fields: "New Password" and "Confirm Password". Below the input fields, there are two buttons: a green "Change" button and a red "Just Kidding" button.

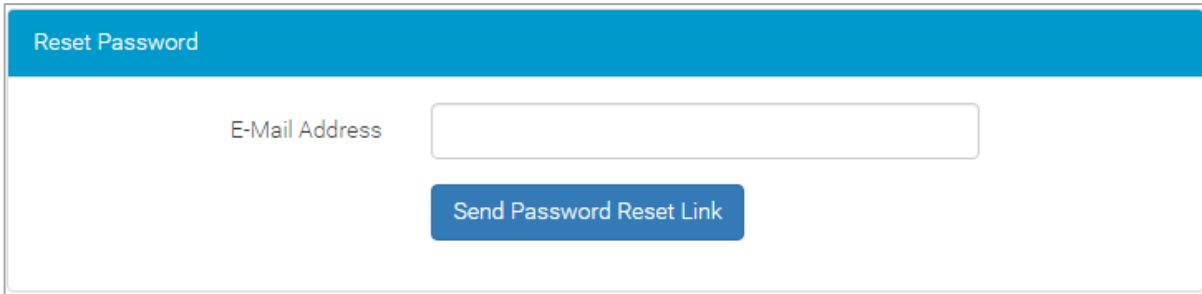
On this screen, type your new password in the boxes and click “Change.”

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



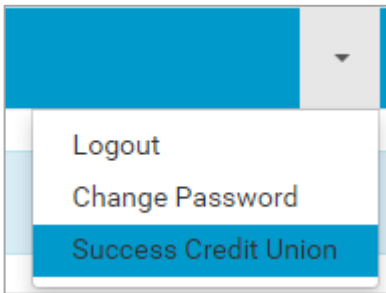
The screenshot shows a web form for resetting a password. At the top, there is a blue horizontal bar with the text "Reset Password" in white. Below this bar, the form has a white background. On the left side of the form, the text "E-Mail Address" is displayed in a light gray font. To the right of this text is a white rectangular input field with a thin gray border. Below the input field, centered horizontally, is a blue rectangular button with the text "Send Password Reset Link" in white.

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.

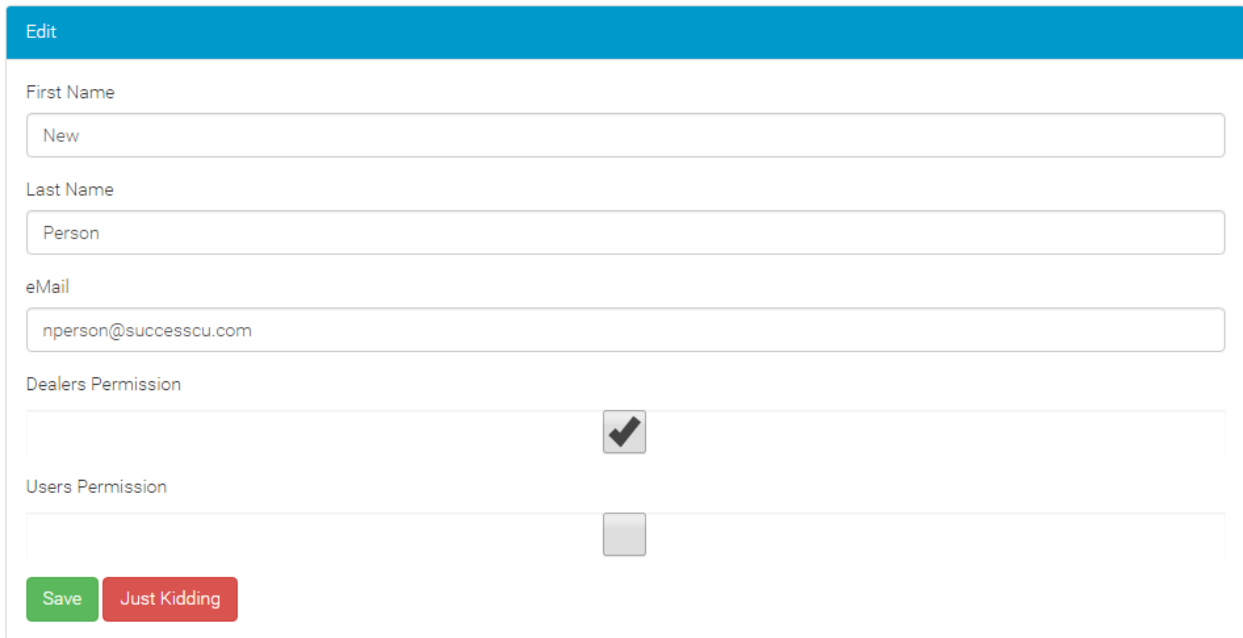


ADDING A USER

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

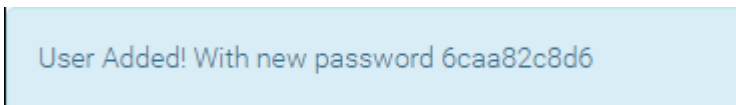


Once you’ve entered all of the necessary information, click “Save” to add the user.

- **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

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

User eMail	First Name	Last Name
nperson@successcu.com	New	Person

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.

Edit

First Name

Last Name

eMail

Dealers Permission

Users Permission


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.

Password reset to: a2dede592a					
Success Credit Union		New User			
Last Name	First Name	eMail	Created	Updated	Reset
Person	New	nperson@successcu.com	09/20/2016	09/21/2016	

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 (FOCU66) New Dealer													
Lender dealer id	Dealer name	Db 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	<input checked="" type="checkbox"/>		
555	Test Dealer	Test Dealer Something	4444 Fake Street	Somewher	MI	49548	6165554567	6165554567			<input type="checkbox"/>		

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

Edit

Partner
dealertrack

Lender Dealer ID (From CU*Base)

Dealer Name

Doing Business As (DBA) Name

Street Address

City

State

Zip

Phone

Fax

Partner Dealer ID

Notes

Active

Save Just Kidding

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.

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

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

Dealer Name
New DT Dealer

Doing Business As (DBA) Name
Big DT Dealer

Street Address
7777 New Street

City
Grand Rapids

State
MI

Zip
49548

Phone
6165557687

Fax
6169998765

Partner Dealer ID
2387492743


Notes
Test 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 from 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

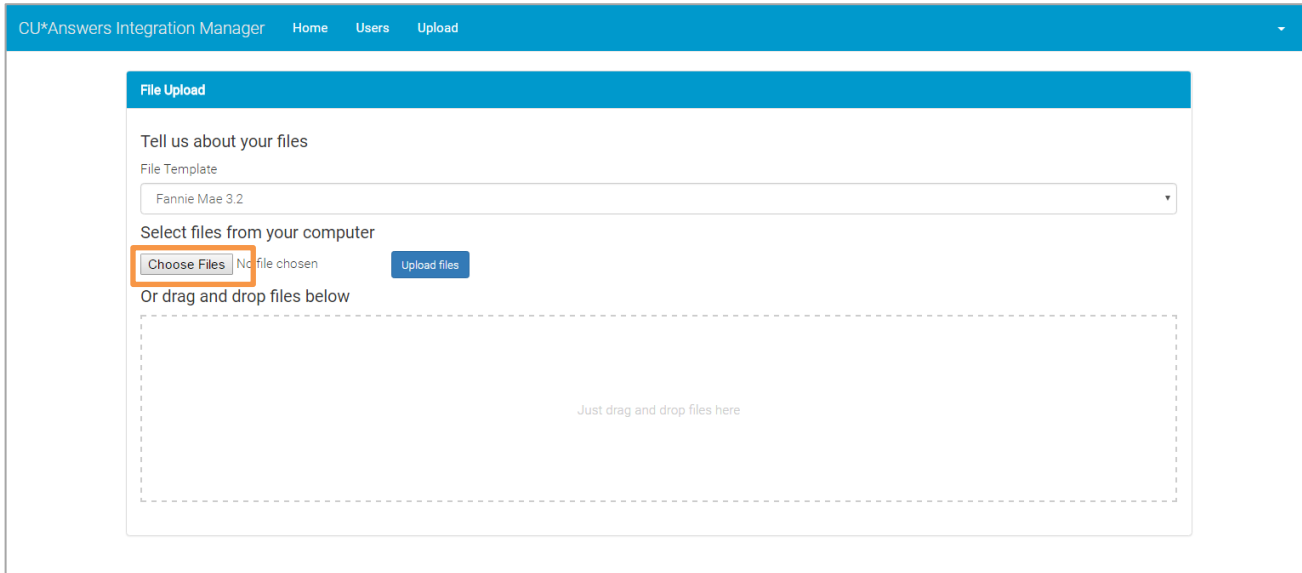
- **Note:** This dealer will be removed from the nightly upload, and will be removed from the partner after their matching process has completed. (This is typically 24-48 hours depending on the partner.)

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.

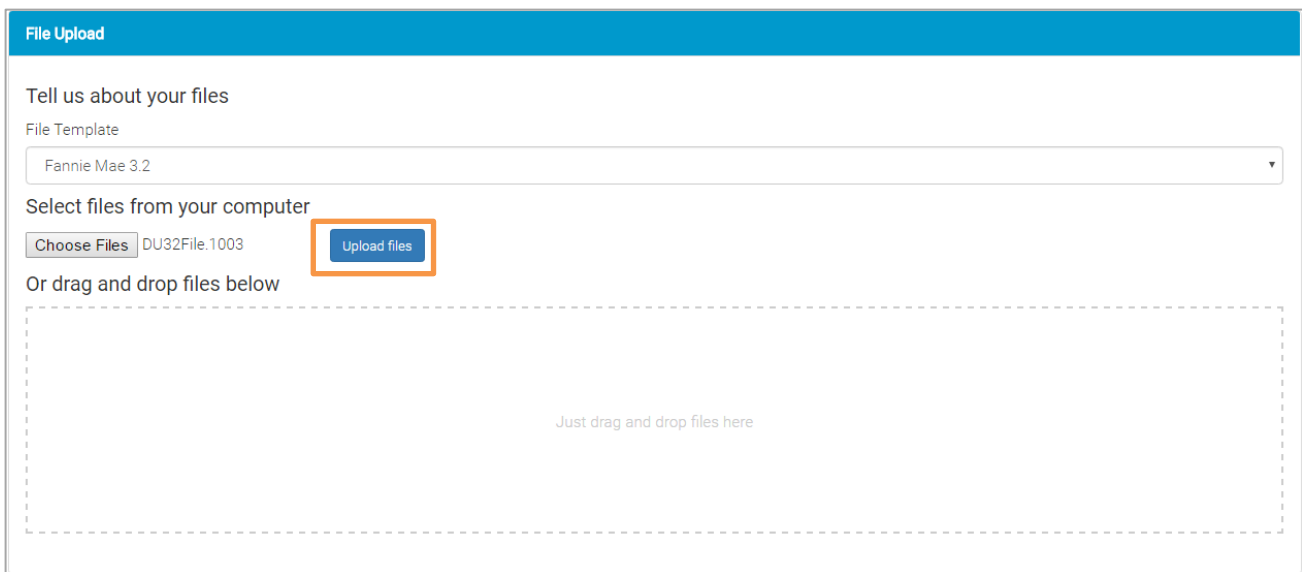


File Upload Screen



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

File Upload

Tell us about your files

File Template

Fannie Mae 3.2

Select files from your computer

Choose Files | No file chosen | Upload files

Or drag and drop files below

Just drag and drop files here

Results

Success: 1 Error: 0 Total: 1

Submission Date	File Name	Status
Thu May 25 2017 20:52:23 GMT-0400 (Eastern Daylight Time)	DU32File.1003	Uploaded Successfully

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

Failed Validation and Successful Upload

File Upload

Tell us about your files

File Template

Fannie Mae 3.2

Select files from your computer

Choose Files | No file chosen | Upload files

Or drag and drop files below

Just drag and drop files here

Results

Success: 1 Error: 1 Total: 2

Submission Date	File Name	Status
Thu May 25 2017 20:53:52 GMT-0400 (Eastern Daylight Time)	Invalid32File.1003	Not valid Fannie Mae 3.2 file
Thu May 25 2017 20:53:53 GMT-0400 (Eastern Daylight Time)	DU32File.1003	Uploaded Successfully