



# E-Contracting Setup Guide

## **Getting Started**

As a valued Maximus partner, we understand how important E-Contracting is to streamlining your business processes. Below is some important information you need to know when considering to start the e-contracting process.

### **1. Before You Start**

Know how you want to create contracts and get rates by selecting one of the options below:

- **Utilize the MAG Dealer Community.**
  - This is 100% free and requires no implementation cost.
  - MAG will be your point of contact for any issues or concerns.
  - Dealer Community can be used for all of your e-contracting needs:
    - i. Remittance
    - ii. Contract Printing
    - iii. Cancel/Void contracts
    - iv. Reporting on sales and performance
    - v. Contacting MAG to address issues or concerns
    - vi. View customer surveys and feedback
- **Integrate with MAG through your DMS provider**
  - This could have some small integration costs from your DMS.
  - Your DMS will be your point of contact for any issues or concerns.
- **Integrate with your Menu provider**
  - This could have some small integration costs from your Menu provider.
  - Your Menu provider will be your point of contact for any issues or concerns.

### **2. Obtain the Proper Contact Points**

- **MAG Dealer Community**
  - Your agent is the best contact point to help initiate the conversations with MAG. You will then receive training and tutorials from MAG on how to use our Dealer Community online to manage your e-contracting business as well as contact us directly if needed.
- **Integration through DMS provider**
  - The DMS provider will work with you and the dealership's administrator to setup e-contracting. We recommend asking your DMS provider for a direct contact you can utilize for support during the process.
- **Integration through Menu provider**
  - The Menu provider will work with you and the dealership's administrator to setup e-contracting. We recommend asking your Menu provider for a direct contact you can utilize for support during the process.



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## 3. Steps to Integrate

- **MAG Dealer Community**
  - Complete a Dealer Community Registration form and submit to MAG.
  - MAG will take care of setting up your profiles and logins.
  - Your agent will coordinate a training demo with MAG to provide overview on how the Dealer Community works.
  - MAG will also provide a user guide that provides step by step instructions on how to utilize the different features available within our Dealer Community.
- **Integration through DMS Provider**
  - Contact the DMS provider and ask to be put in touch with the account representative for the dealership. *Be prepared to be put on hold.*
    - The DMS provider will work with you and the dealership's administrator to setup e-contracting, so it is important to have the administrator in the room with you when you contact the DMS.
    - Depending on your dealership's needs, there may be a need to add additional DMS software – your DMS may charge fees to add this additional software. Your DMS account representative can advise you if there will be additional costs. MAG will not have any additional costs for integration on our end.
  - The DMS provider will connect to MAG's servers using a "bridge" company.
    - Confirm with your DMS rep which bridge company they will be using.
    - While on the phone with your DMS representative, please contact MAG's Sales Dept. at 941-739-0044 to get your 'dealer number' (also known as Dealer ID or a Provider Dealer Code). A 'dealer number/ID/code' is unique to that dealership and will be used by your DMS representative in conjunction with the bridge company to pull rates and forms.
    - Once you receive your dealer number/ID/code, MAG will begin the process of connecting their servers to the bridge. It is a quick process on our end. As previously noted, the 'bridge company' may charge an initial fee to integrate with the DMS.
    - Before exiting the call with your DMS account representative, please conduct a few tests to confirm everything.
  - Because your DMS representative will be your point of contact for all questions or issues we strongly advise asking them to provide you a direct line of access or a specific contact person that you can utilize.

**\*Please Note:** *Your DMS provider may not make all the same services available to you that the MAG dealer community provides.*



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- **Integration Through Menu Provider**

- Contact the Menu provider and ask to be put in touch with the account representative for the dealership. *Be prepared to be put on hold.*
  - The Menu provider will work with you and the dealership's administrator to setup e-contracting, so it is important to have the administrator in the room with you when you contact the Menu provider.
  - Depending on your dealership's needs, there may be a need to add additional software to your menu provider package – your menu provider may charge fees to add this additional software. Your menu provider account representative can advise you if there will be any additional costs. MAG will not have any charges on our end for integration.
- The Menu provider will work with you and the dealership's administrator to setup e-contracting.
  - Confirm with your Menu provider rep which bridge company they will be using.
  - While on the phone with your Menu provider representative, please contact MAG's Sales Dept. at 941-739-0044 to get your 'dealer number' (also known as Dealer ID or a Provider Dealer Code). A 'dealer number/ID/code' is unique to that dealership and will be used by your Menu provider representative in conjunction with the bridge company to pull rates and forms.
  - Once you receive your dealer number/ID/code, MAG will begin the process of connecting their servers to the bridge. It is a quick process on our end. As previously noted, the 'bridge company' may charge an initial fee to integrate with the Menu provider.
  - Before exiting the call with your Menu provider account representative, please conduct a few tests to confirm everything.
- Because your Menu provider will be your point of contact for all questions or issues we strongly advise asking them to provide you a direct line of access or a specific contact person that you can utilize.

**\*Please Note:** *Your Menu provider may not make all the same services available to you that the MAG dealer community provides.*

#### **4. Notes:**

- For your convenience if you are integrating through your DMS, MAG has attached the setup guide for both RR and CDK to this packet since they are the most common DMS providers.
- When integrating through your DMS or Menu provider, it typically takes just 30 minutes to get E-Contracting set up. There may be up to a two-week delay if the DMS or Menu provider does not already have an integration setup with MAG.