CARS COMMERCE™

Automatic Guide

User Settings and Roles in Automatic

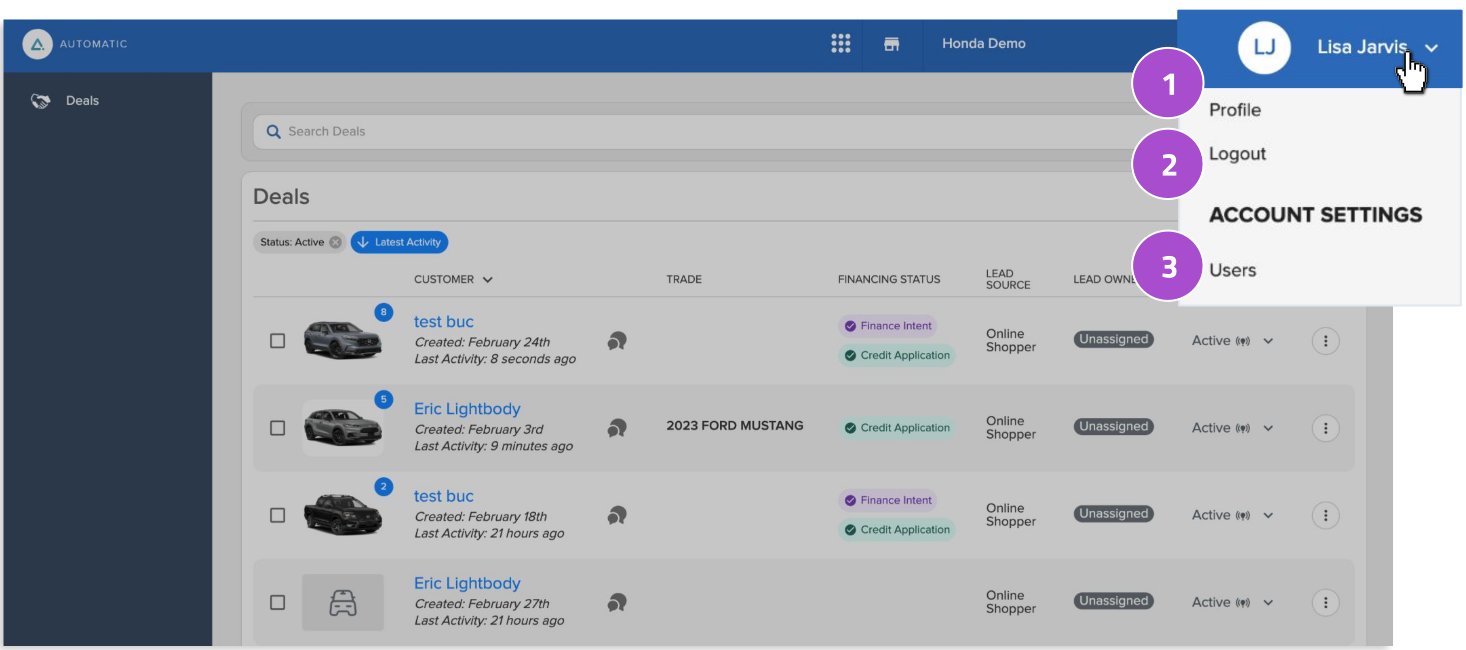
Depending on your permissions level in Automatic, you can adjust your profile and account settings, including dealership rooftops and users on your team. Let's jump into how to access and edit your settings in Automatic.

Adjusting Account Settings

Click your name in the top right corner. You'll notice options to:

1. View your Profile
2. Log out of Automatic
3. View or Edit Users*

**Depending on your role. Not applicable to Agents*

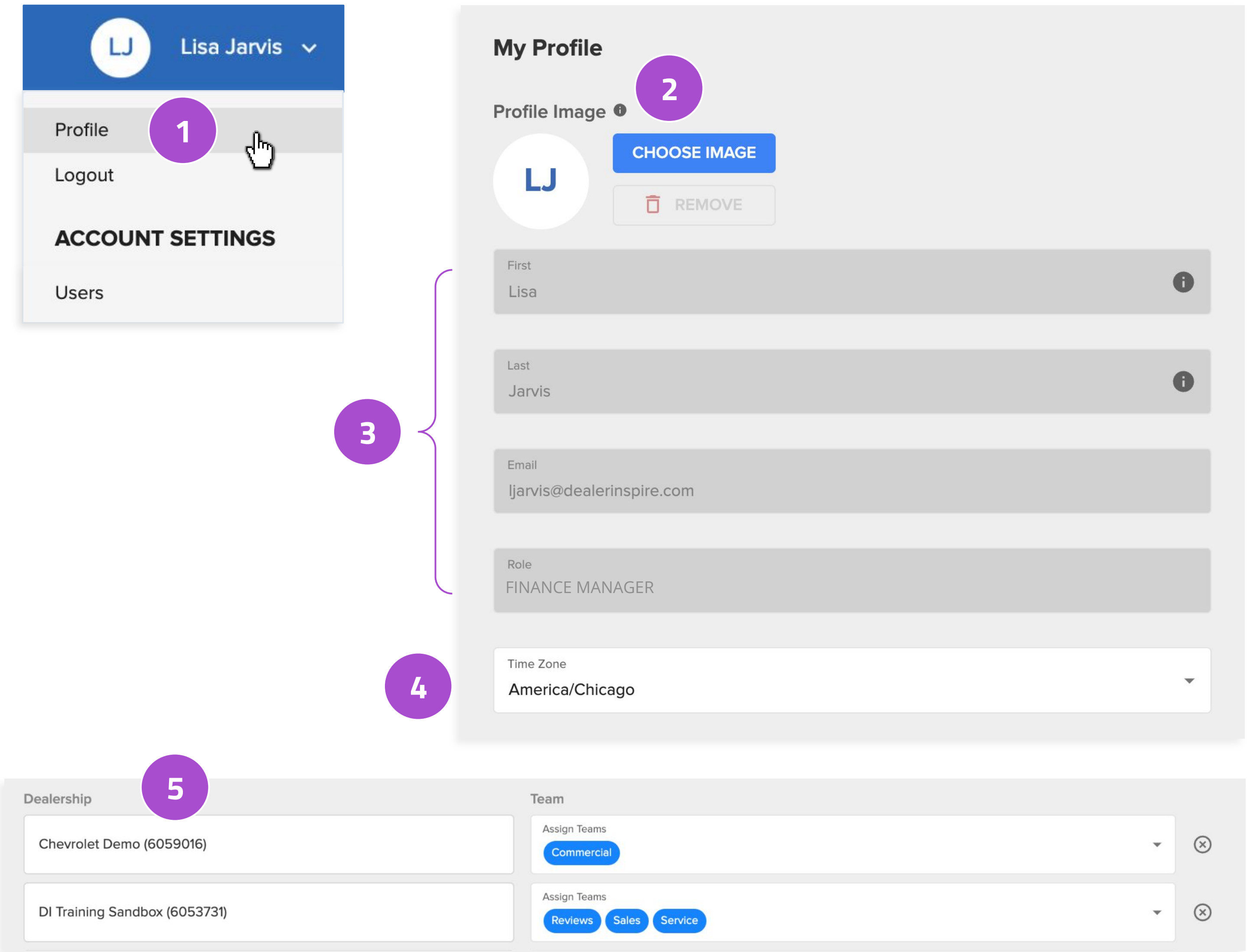


Let's start with Profile.

Updating your Profile

1. Click Profile.
2. Click Choose Image to upload a professional photo from your desktop
3. Edit your Name and View your Email Address and User Role

   Only **Managers** or **Finance Managers** can edit the roles of others who are of an equal or lesser value to their own role.
4. Update your Timezone, as needed
5. See a list of the Dealerships and Teams you are associated with, if applicable.

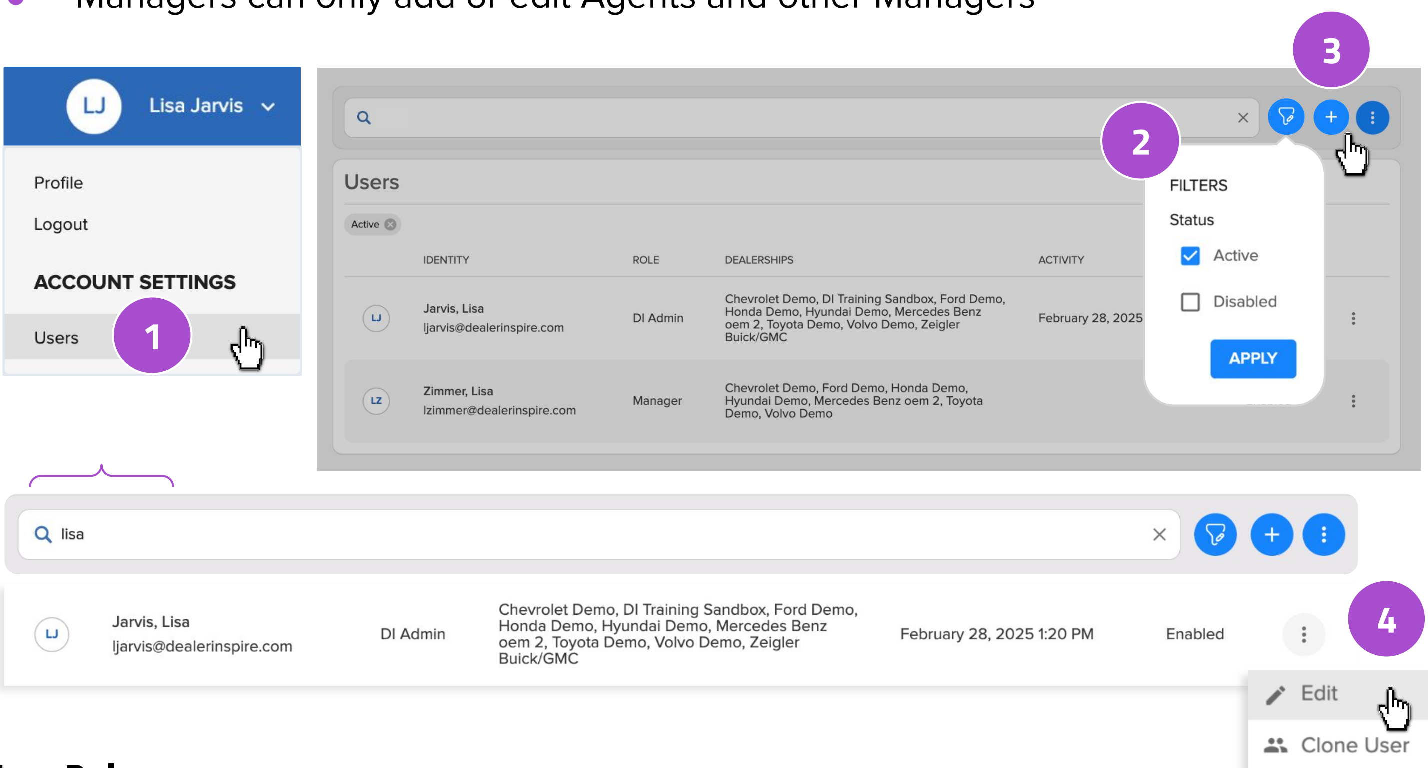


Editing your Users

As a **Manager** or **Finance Manager**, you can see a comprehensive list of users. Filter by **Active** or **Disabled**, or **Add New**. When adding a new user, the process is similar to the profile settings on the previous page.

To edit an existing user, search their name. Click the 3 dots, then click Edit.

- Only Finance Managers can add or edit new users for any role:
  (Agents, Managers, and other Finance Managers)
- Managers can only add or edit Agents and other Managers



User Roles

Managers: Create, edit, or disable user roles “Agent” and “Manager,” edit or assign dealerships to an individual, edit credit application details like finance terms, rebates and incentives, and more.

Finance Manager: Can do all that a manager can do, except disable a user, and can also view a customer’s Social Security Number (SSN). This is hidden for security purposes for all other users.

Agents: Can assign themselves deals, edit customer information, create and archive deals, add vehicles, view garages, and edit payments within the garage.

Have questions, or need something adjusted? Reach out to support@creditiq.com.