

# User Settings and Roles in Automatic

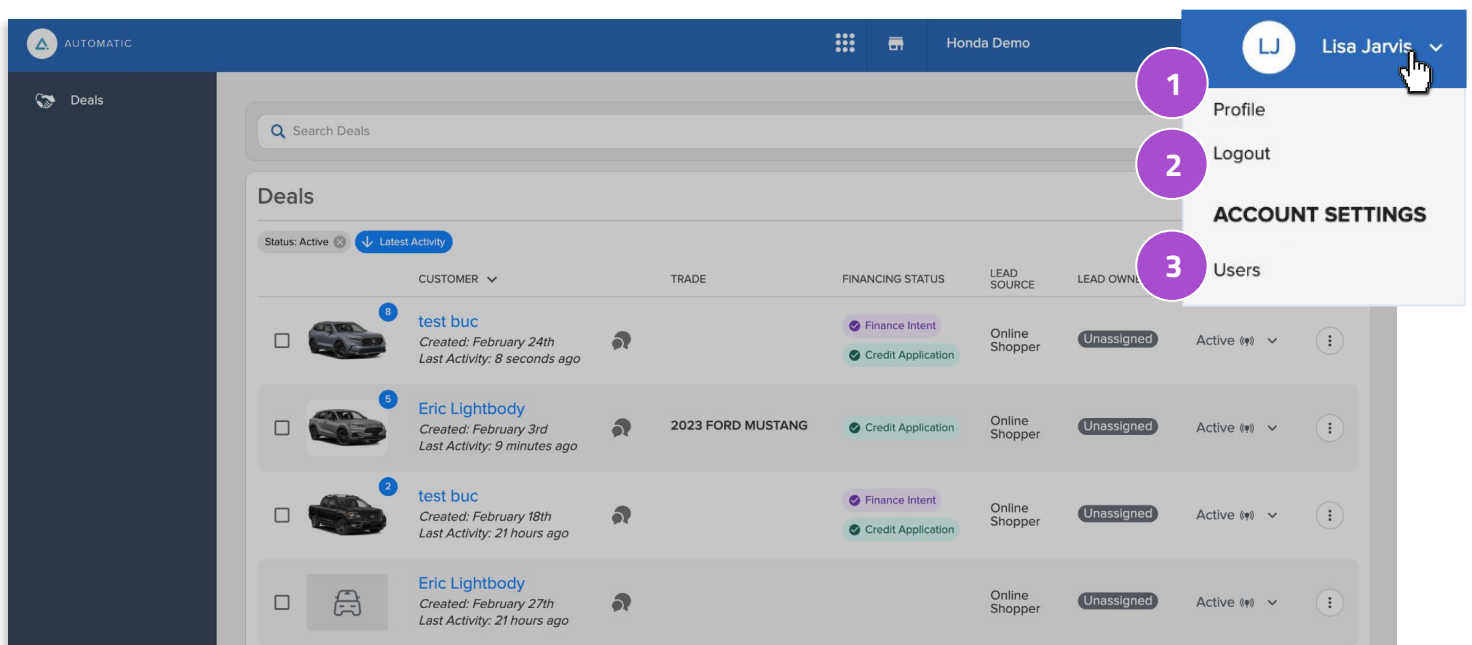
Depending on your permissions level in Automatic, you can adjust your profile and account settings, including dealership rooftops and users on your team. Let's jump into how to access and edit your settings in Automatic.

## 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*



The screenshot shows the Automatic user interface. In the top right corner, the user's name "Lisa Jarvis" is displayed next to a dropdown arrow. A mouse cursor is clicking on this name. A dropdown menu is open, showing the following options:

- 1 Profile
- 2 Logout
- ACCOUNT SETTINGS**
- 3 Users

The main content area displays a table of deals. The table has columns for CUSTOMER, TRADE, FINANCING STATUS, LEAD SOURCE, and LEAD OWNER. The deals listed are:

CUSTOMER	TRADE	FINANCING STATUS	LEAD SOURCE	LEAD OWNER
test buc Created: February 24th Last Activity: 8 seconds ago		Finance Intent Credit Application	Online Shopper	Unassigned
Eric Lightbody Created: February 3rd Last Activity: 9 minutes ago	2023 FORD MUSTANG	Credit Application	Online Shopper	Unassigned
test buc Created: February 18th Last Activity: 21 hours ago		Finance Intent Credit Application	Online Shopper	Unassigned
Eric Lightbody Created: February 27th Last Activity: 21 hours ago			Online Shopper	Unassigned

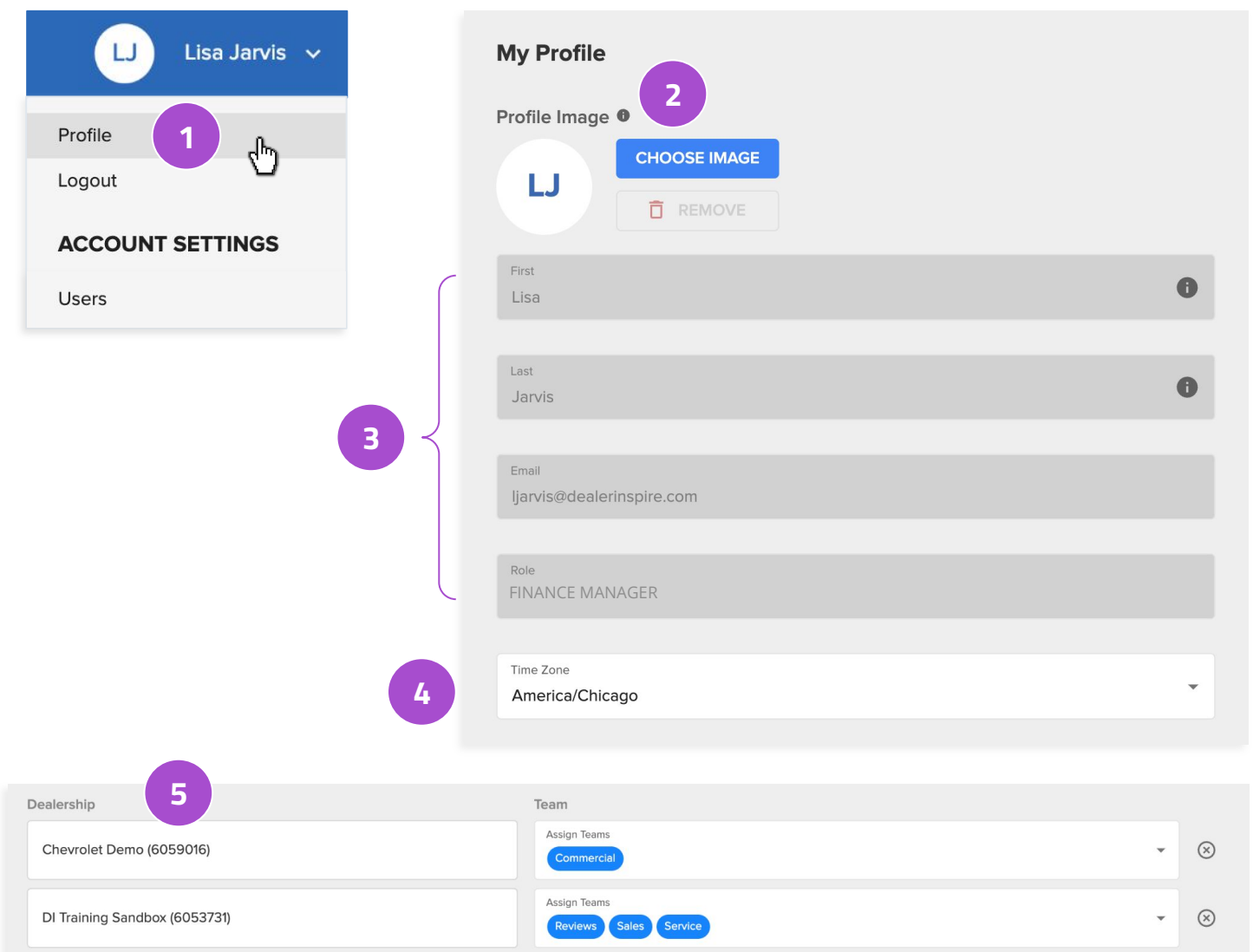
Let's start with Profile.

## 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.



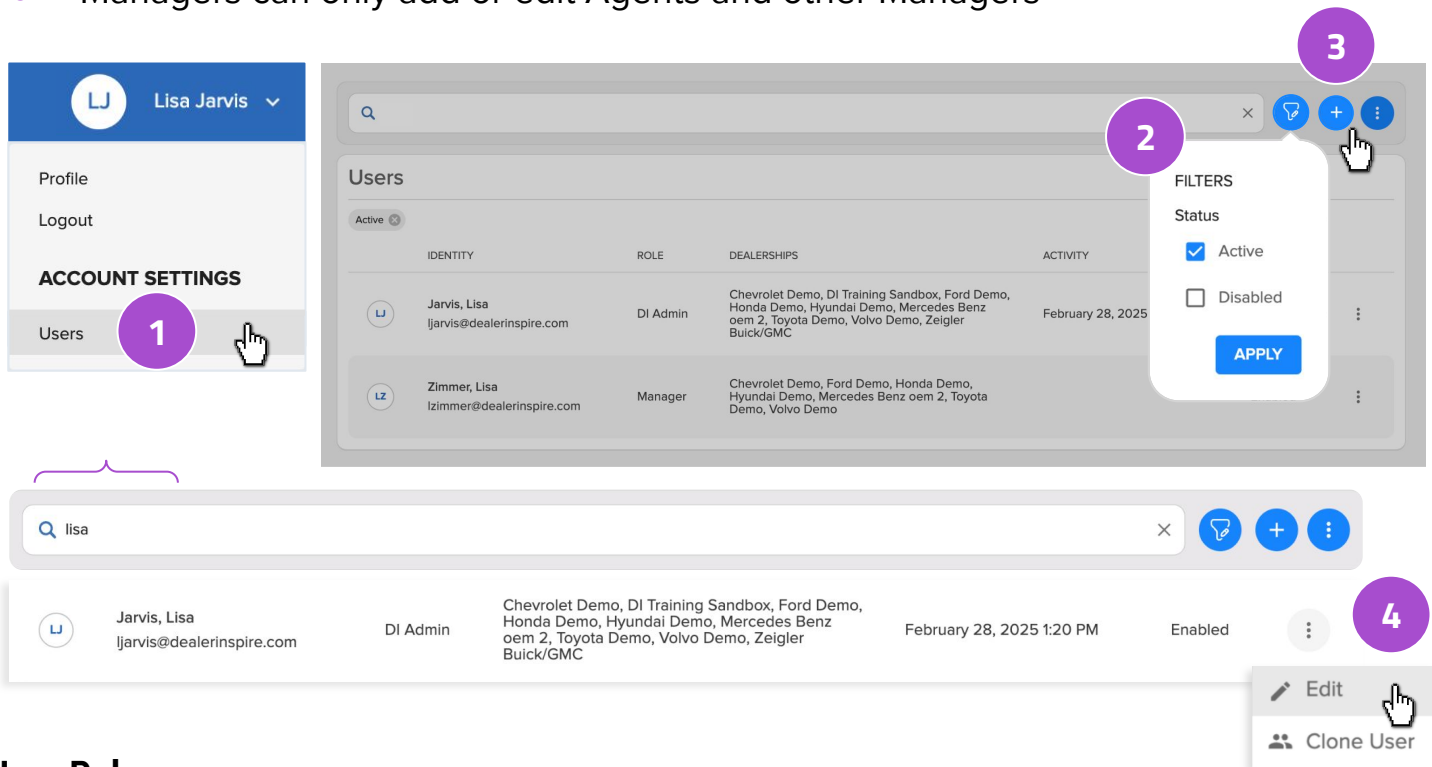
The screenshot illustrates the 'My Profile' update process. On the left, a user menu for 'Lisa Jarvis' is shown with a callout '1' pointing to the 'Profile' option. The main profile page on the right has callout '2' pointing to the 'Profile Image' section, which includes a 'CHOOSE IMAGE' button and a 'REMOVE' button. Below this, the 'First' name field contains 'Lisa' and the 'Last' name field contains 'Jarvis', with callout '3' pointing to these fields. The 'Email' field contains 'ljarvis@dealerinspire.com' and the 'Role' field is set to 'FINANCE MANAGER'. The 'Time Zone' dropdown menu is set to 'America/Chicago', with callout '4' pointing to it. At the bottom, the 'Dealership' section lists 'Chevrolet Demo (6059016)' and 'DI Training Sandbox (6053731)', with callout '5' pointing to the first dealership. The 'Team' section shows 'Assign Teams' dropdowns with 'Commercial' selected for the first team and 'Reviews', 'Sales', and 'Service' selected for the second team.

## 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



The screenshot illustrates the user management interface. On the left is a sidebar for 'Lisa Jarvis' with options for Profile, Logout, and ACCOUNT SETTINGS, where 'Users' is highlighted with a purple circle '1'. The main area shows a 'Users' table with columns for IDENTITY, ROLE, DEALERSHIPS, and ACTIVITY. A filter dropdown is open, showing 'Status' with 'Active' selected and 'Disabled' unselected, with an 'APPLY' button. A purple circle '2' is next to the filter dropdown, and a purple circle '3' is next to the three-dot menu icon in the table header. Below the table is a search bar with 'lisa' entered. A specific user row is highlighted, showing 'Jarvis, Lisa' with role 'DI Admin' and status 'Enabled'. A purple circle '4' is next to the three-dot menu icon for this user, which has opened a dropdown with 'Edit' and 'Clone User' options.

IDENTITY	ROLE	DEALERSHIPS	ACTIVITY
Jarvis, Lisa ljarvis@dealerinspire.com	DI Admin	Chevrolet Demo, DI Training Sandbox, Ford Demo, Honda Demo, Hyundai Demo, Mercedes Benz oem 2, Toyota Demo, Volvo Demo, Zeigler Buick/GMC	February 28, 2025
Zimmer, Lisa lzimmer@dealerinspire.com	Manager	Chevrolet Demo, Ford Demo, Honda Demo, Hyundai Demo, Mercedes Benz oem 2, Toyota Demo, Volvo Demo	

## 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](mailto:support@creditiq.com).