

DEALERTRACK DMS INSTALL TIMELINE

DMS Contract Signed and Processed

After you sign the DMS contract with the help of your Dealertrack DMS sales representative, we want to ensure your install goes as smoothly as possible. Here is what to expect.

**This process is dependent on dealership size, dealership involvement, and install queue.*

PRO TIP: Receive buy-in from dealership management and staff before you proceed. This will ensure a better install.

PLAN & LAUNCH

Week 1

Meet & Greet, Set Expectations

- Project Manager is assigned and reviews key implementation dates.
- An Introduction Call is coordinated with primary dealership contact.

Weeks 3–4

Submit Forms & User Creation

- F&I Forms are discussed and provided
- Dealertrack users are created for DMS access and Online Training
- Our Application Configuration Team will coordinate calls with each department manager to review and discuss their dealership-specific setups and configure Dealertrack DMS for you.

Week 2

Preliminary Setup

- Dealership selects their Project Champion as their key individual who will drive the implementation internally.
- Preliminary documents are completed, and actions are taken to begin network setup and data conversions.
- Implementation Plan Review Call scheduled with all dealership management and an Exploration Call is scheduled with each dealership department to gather initial information.

PRO TIP: It is crucial to submit completed forms in a timely manner or you will have to extend your install date.

READINESS

Weeks 5–7

Preparation & CLC Training (Client Learning Center)

- All users begin their first phase of training using our role-based pre-recorded courses and provided updates on everyone's completion.

PRO TIP: Dealerships who practice in their beta environment are much more prepared at their go-live date.

Week 8

On-Site Readiness Training

- A Senior Implementation Specialist will be on-site for four days to test configurations with each department and prepare for your Go-Live.
- At the end of your Readiness Visit, you will have a beta "sandbox" environment to test and train in until your Go-Live transition.

Weeks 9–10

Webinar Training

- All users will begin their second phase of training and participate in our Webinar Training Sessions with our DMS experts using your dealership environment and data.
- We will schedule multiple sessions for each department, allowing you greater flexibility to coordinate amongst your teams.

PRO TIP: In order to ensure a smooth install during go-live week, the finance manager needs to test F&I forms in Dealertrack DMS.

Week 11

Prepare for Go-Live

- After close of business on Saturday and all applicable reports have been run, we will notify our Conversion Team to begin the final conversion.
- Once our Conversion Team has confirmed all data has been converted, they will notify your Implementation Manager.

GO-LIVE

Week 11

Install Dealertrack DMS

- Our teams will arrive on-site Monday morning to begin working with your department managers on your validation process to ensure your data has converted accurately.
- Once we have completed your validation checklists and you have determined we can move forward, we will officially begin your On-Site Training and work within each department and team member throughout the week.

Weeks 13–14

Continued On-Site Training

- Our teams will continue to work with each of your departments and build upon their knowledge acquired through the prior CLC Training and Webinar Sessions.
- Our Implementation Specialists work with each team member and guide them through their daily process while they work with customers.

POST-INSTALL SUPPORT

Weeks 15–18

- Provide a direct line of communication between an assigned On-Boarder and dealership managers to resolve outstanding items from the install.

ONGOING PARTNERSHIP

Weeks 19+

- Partner with a dedicated Performance Manager who will engage with your dealership and is passionate about your success.

Dealertrack DMS 
TECHNOLOGY THAT DRIVES YOU.

Dealertrack DMS is an industry-leading dealer management system that provides dealers with the latest technology needed to run a more profitable business. As part of the Cox Automotive family, the Dealertrack platform offers a full suite of unique features, including real-time business reporting, anytime/anywhere access, open vendor integration, and an easy-to-learn interface.

For more information, visit Dealertrack.com/DMS.