DealerFlow Cloud™ — User Manual

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# Getting Started

* Login via SSO; set up MFA.
* Complete organization and rooftop setup wizard.
* Import legacy customers, vehicles, and chart of accounts.
* Assign roles and permissions (RBAC).

# Core Workflows

Sales & F&I

* Create a deal → add trade-in → desk with lender programs → present digital menu → eSign.

Service

* Check-in appointment → capture photos/videos → authorize upsell → complete RO → collect payment.

Accounting

* Review daily DOC → post entries → reconcile bank feed → month-end close checklist.