

# Dealer Access System (DAS) - Onboarding Guide

Rockland Trust has partnered with DataScan, a global leader in providing inventory management solutions. Through the Dealer Access System (DAS) solution, your dealership can conveniently manage its floor plan loan relationship in real time with Rockland Trust. This resource contains instructions on:

- Accessing the DAS Portal
- Resetting a Password
- Multi-factor Authentication
- Creating a New User
- Managing a Deposit Account Overdraft
- Forwarding Documentation/Evidence

View our separate [training video](#) for step-by-step instructions on submitting principal payments and adding units to a floor plan.

## Accessing the DAS Portal

You can access the DAS portal (login page) on the [Rockland Trust website homepage](#) through either a mobile or desktop browser. Once there, select the "Account Logins" button located in the upper right corner of your screen. From there, select "Business Banking" where you will then be able to select the "Log In" button for Dealer Access System.

Note that DAS is not accessible through the Rockland Trust Mobile Banking application.



### Log in to your Business Accounts

Rockland Trust gives you a variety of services that help you use and manage your accounts, whenever and wherever you want.  
\* indicates a required field.

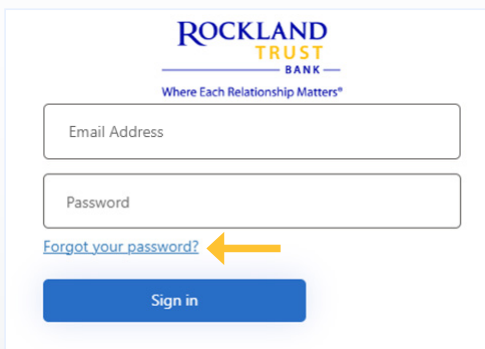
Online Banking Login	<input type="text" value="* Enter Business User ID"/>	LOG IN
Enroll   Security		
Remote Deposit Plus		LOG IN
Business Credit Card		LOG IN
Tax Payments		LOG IN
Foreign Exchange Online		LOG IN
Dealer Access System (DAS)		LOG IN

## Resetting a Password

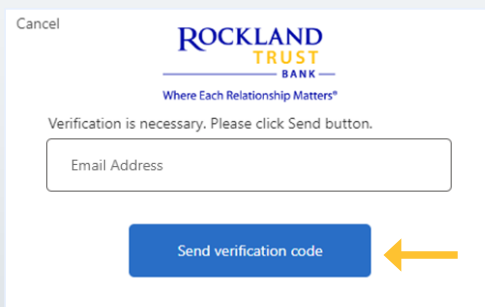
Each user will be required to reset their password at the time of their initial login. You will also use this if you forget your password or are locked out of your accounts. Users have the ability to reset their own password if locked out.

### To reset your password:

1. Select the "Forgot your password?" link on the DAS login screen.



2. You will be brought to a new screen that will prompt you to select an authentication method. Select "Email".
3. You will then be brought to a new screen displaying the email associated with the account. Select "Send verification code".



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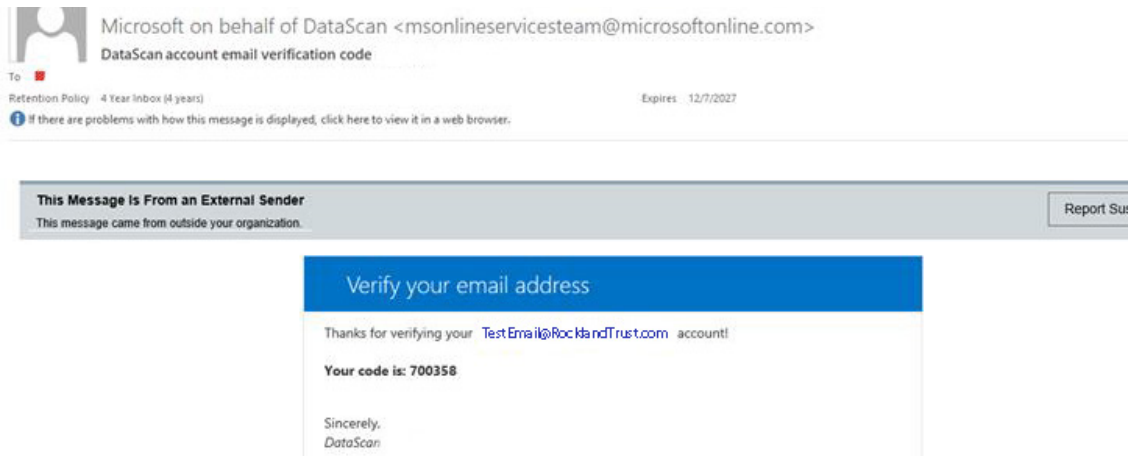
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4. Locate the verification email. This will appear as "Microsoft on behalf of DataScan" from the email "msonlineserviceteam@microsoftonline.com".
5. Copy the unique code located within the verification email.



6. Within the same email, select the button to "Verify your email address".
7. This will bring you back to DAS. Paste the copied code under "Verification code" and select "Verify code".

A screenshot of the Rockland Trust Bank verification code input screen. It features the Rockland Trust Bank logo and the tagline "Where Each Relationship Matters". The text says "Verification code has been sent to your inbox. Please copy it to the input box below." There are two input fields: "Email Address" and "Verification code". A yellow arrow points to the "Verification code" field. Below the fields are two buttons: "Verify code" and "Send new code".

8. Once the code has been accepted, the user will be able to create a new password.
9. Select the "Continue" button to finalize the password reset.

A screenshot of the Rockland Trust Bank new password creation screen. It features the Rockland Trust Bank logo and the tagline "Where Each Relationship Matters". There are two input fields: "New Password" and "Confirm New Password". A yellow arrow points to the "Continue" button at the bottom.

Please be aware of the following password requirements:

- Must be a minimum of 15 characters
- Must include lowercase and uppercase letters
- Must include at least one number
- Must include at least one special character; allowable characters include: !@#%&^&\*()-\_+=?
- Must not exceed the maximum length of 20 characters

Note that DAS will require you to reset your password every 60 days going forward.

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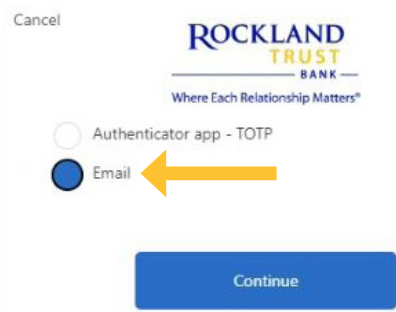
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## Multi-factor Authentication

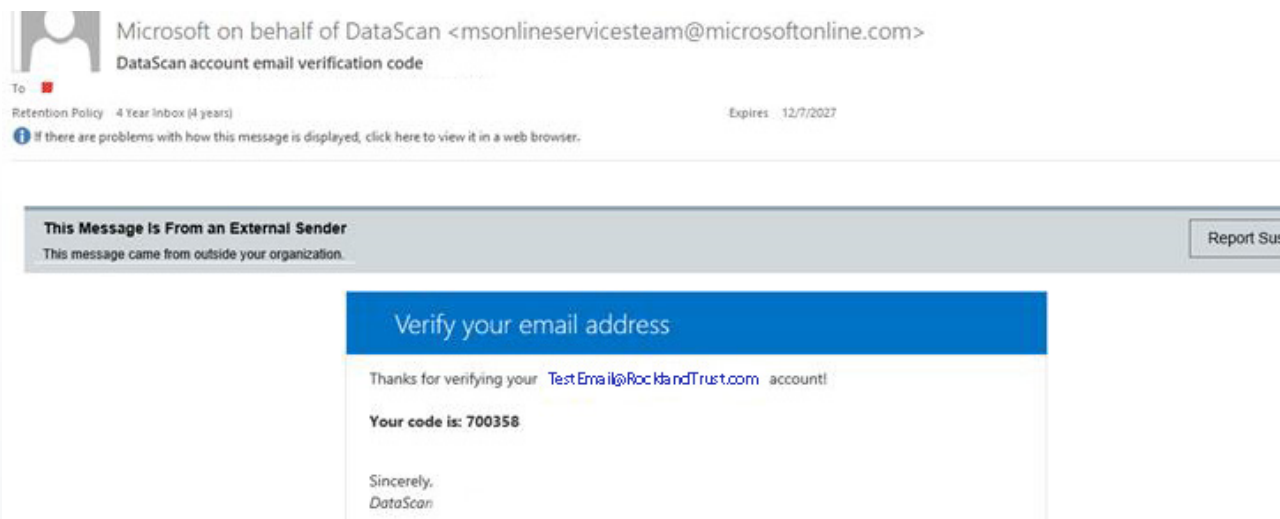
Multi-factor authentication (MFA) increases your ability to protect sensitive data. All users of DAS are automatically required to complete an MFA with each sign-in.

To complete the MFA process, follow the below instructions:

1. Enter your username and password and select "Sign in".
2. You will be brought to a new screen that will prompt you to select an authentication method. Select "Email".



3. You will be brought to a new screen displaying the email associated with the account. Select "Send verification code".
4. Locate the verification email. This will appear as "Microsoft on behalf of DataScan" from the email "msonlineservicesteam@microsoftonline.com".



5. Copy the unique code located within the verification email.
6. Within the same email, select the button to "Verify your email address".
7. This will bring you back to DAS. Paste the copied code under "Verification code" and select "Verify code".

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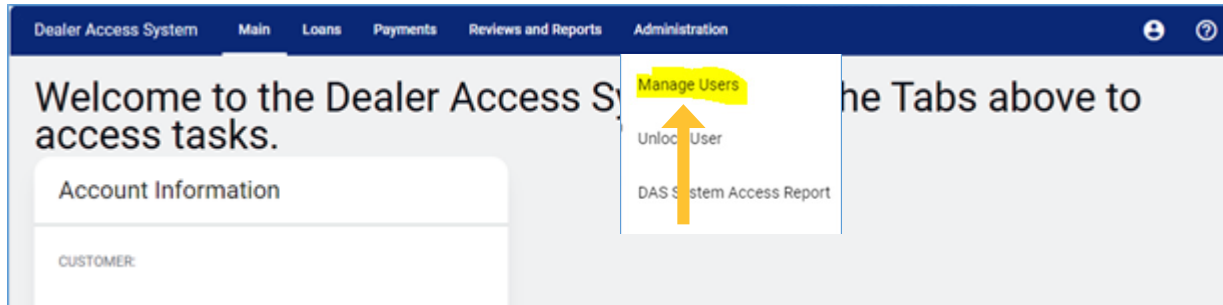
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## Creating a New User

Only administrators (owners) within the dealership are able to create additional DAS users. Administrators are also able to manage the roles and permissions of the other users.

1. To create a new user, select "Administration" from the top navigation bar of the DAS homescreen.
2. Then select "Manage Users" from the drop-down menu.



3. This will populate a new DAS Users screen. Select the button for "New".



4. In the User Information fields, input the required information – these are designated with red stars. Note that User Roles and Permissions can be edited only after the user has been created.

A screenshot of the "User Information" form. It is titled "Required field" and "User Information". The form contains the following fields: "User ID" (text input, value: "test"), "First Name" (text input, value: "test"), "Last Name" (text input, value: "user"), "Language" (dropdown menu, value: "English"), "Date Format" (dropdown menu, value: "MM-DD-YYYY"), and "Email Address" (text input, value: "testuser@gmail.com"). There is an unchecked checkbox for "Opt-in to receive notifications from the finance company". At the bottom, there are two "Edit" buttons for "User Roles" and "Assign Equity Accounts".

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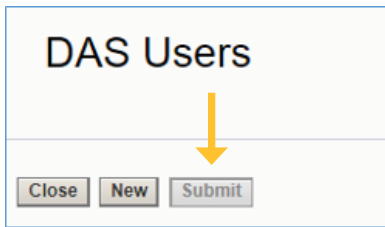
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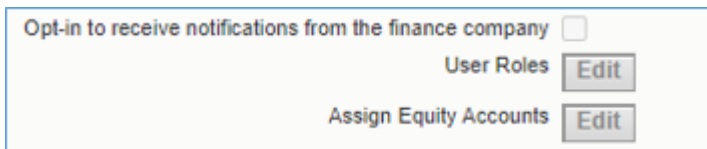
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5. Once you have completed the new user entry, select the "Submit" button located above the User Information fields (next to the "New" button).



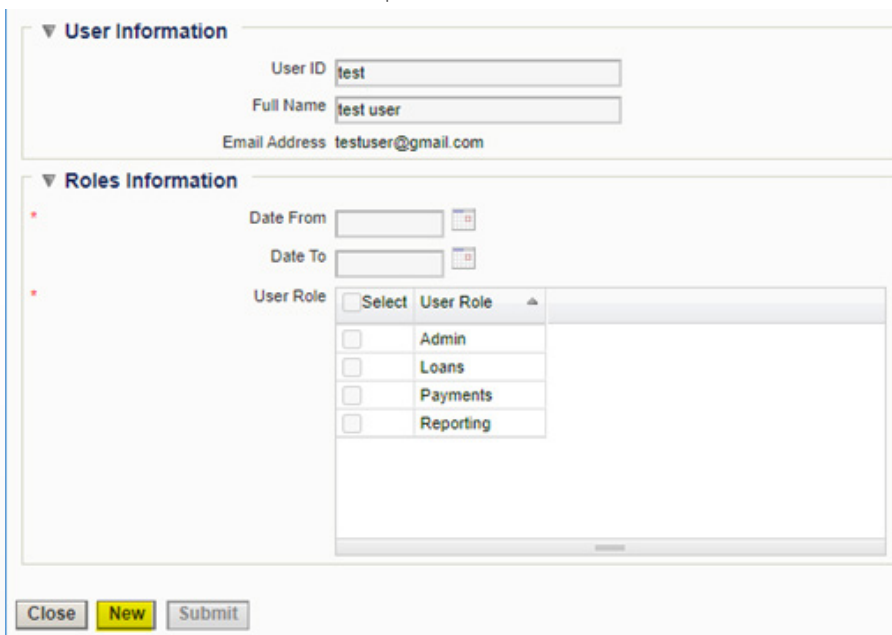
The screenshot shows a window titled "DAS Users". At the bottom of the window, there are three buttons: "Close", "New", and "Submit". A yellow arrow points down to the "Submit" button.

6. To edit the User Roles, select the "Edit" button next to User Roles.



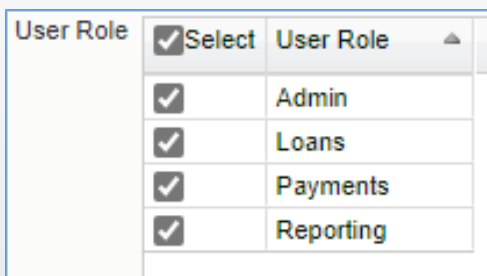
The screenshot shows a section with a checkbox for "Opt-in to receive notifications from the finance company". Below it, there are two sections: "User Roles" with an "Edit" button, and "Assign Equity Accounts" with an "Edit" button.

7. This will populate the User Information and Roles Information screen. Input the start date for the user's access into the Date From field. An end date is not required.



The screenshot shows a form with two sections: "User Information" and "Roles Information". The "User Information" section has fields for "User ID" (test), "Full Name" (test user), and "Email Address" (testuser@gmail.com). The "Roles Information" section has "Date From" and "Date To" fields, and a "User Role" dropdown menu with options: Admin, Loans, Payments, and Reporting. At the bottom, there are "Close", "New", and "Submit" buttons.

8. Select the User Role that the user should have access to.



User Role	Select	User Role
	<input checked="" type="checkbox"/>	Select
	<input checked="" type="checkbox"/>	Admin
	<input checked="" type="checkbox"/>	Loans
	<input checked="" type="checkbox"/>	Payments
	<input checked="" type="checkbox"/>	Reporting

- Admin: Enables user profile creation, deactivation, and management of user roles
- Loans: Enables submission of advance requests and real-time viewing of unit inventory
- Payments: Facilitates processing principal payments for units in the current inventory
- Reporting: Grants access to generate and download all reports

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9. Select the "Submit" button to update the new user. Once completed, the new User Roles will appear under the Assigned Roles section.

▼ Assigned Roles

Click to select

User Roles	Date From	Date To
<a href="#">Loans</a>	12-14-2023	
<a href="#">Payments</a>	12-14-2023	
<a href="#">Reporting</a>	12-14-2023	
<a href="#">Admin</a>	12-14-2023	

At this time, you have completed creating a new user. It's important to be aware that the email used by the administrator to create the new user will serve as the username for this individual. As a reminder, the new user will need to create a password using the password reset tool. Once completed, they will have the ability to access DAS.

## Managing a Deposit Account Overdraft

If a Rockland Trust deposit account is overdrawn due to a floor plan payment, this overdraft will need to be covered by 10:00 AM with either a wire credit, cash deposit, or an advance request, submitted and processed through the DataScan DAS system. If the overdraft is not covered by the 10:00 AM cutoff, the entire payment amount will be returned and each payment request will need to be resubmitted once funds are available.

## Forwarding Documentation/Evidence

This process will not change with the adoption of DAS. To submit additional documentation or evidence for a unit request, please send these components to our fax at 508.732.7404 or email to [Floorplan.Mailbox@RocklandTrust.com](mailto:Floorplan.Mailbox@RocklandTrust.com).

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