

## Setup Instructions – Password Protection for Finance Forms

### Please Note

If a Finance Form has fields to capture sensitive customer information (SSN, Driver's License ID, etc.) or "custom" information of any kind, such fields WILL NOT be viewable in corresponding lead records in the ARI CMS unless and until someone in the role of **Dealer Administrator** configures a password in the **Secure Lead Form Component** settings. This requirement is in place to protect you and your customers from security breaches.

Without a password being applied, non-custom form fields will display to users in the lead record, but custom fields will be hidden. Additionally, custom fields are permanently inaccessible on lead records captured prior to a password being configured for the form. In short, it's very important to add a password as close to the deployment of the form as possible, so that captured customer information isn't irretrievably lost.

It is not possible for an ARI employee to configure the password settings on a secure form. For security purposes, only users in the role of **Dealer Administrator** can manage the password settings for the component.

### Password Setup

1. In the ARI CMS, go to **Account**. Find your website in the Sites list and select **Components**.
2. Scroll down to the instance of the **Secure Lead Form Component** that you wish to configure. Click on the gear icon.
3. Under **Component Settings**, scroll to the following form fields:
  - a. **Secure Password**: Enter a password (minimum of 6 characters)
  - b. **Confirm Password**: Re-enter the password
  - c. **Show Password**: This merely decrypts the password in the browser view, so that a user can visually verify that they have entered the password as intended.
4. Click **Save Settings** and **Publish Changes**.

### Change Password

If a Dealer Administrator wishes to change the password on the Secure Lead Form Component, they must know the current password. To change the password when the current password has been forgotten, please see Secure Leads: Forgotten Password.

1. In the ARI CMS, go to Account. Find the applicable website in the Sites list and select **Components**.
2. Scroll down to the instance of the **Secure Lead Form Component** that you wish to configure. Click on the gear icon.
3. Under **Component Settings**, scroll to **Password Set**.
4. Click the **Change Password** button.
5. Enter the existing password in the field labeled **Current Password**
6. In the **Secure Password** field, enter a password (minimum of 6 characters)
7. Re-enter the password in the **Confirm Password** field
8. Click **Save Settings** and **Publish Changes**.

## Forgot Password

If a Dealer Administrator has forgotten their password on the **Secure Lead Form Component**, they can create a new one. No other dealer role or ARI role has access to the “**Forgot Password**” function.

**IMPORTANT:** When a password is changed via the **Forgot Password** process, all previously captured custom fields for that form are permanently purged from the lead records. This is a security measure that cannot be bypassed by design.

1. In the ARI CMS, go to Account. Find the applicable website in the Sites list and select **Components**.
2. Scroll down to the instance of the **Secure Lead Form Component** that you wish to configure. Click on the gear icon.
3. Under **Component Settings**, scroll to **Password Set**.
4. Click the **Forgot Password** button. This generates a link and sends it to the email account for the **Dealer Administrator**.
5. Clicking the emailed link will bring the user to a screen where they can enter and confirm a new password.
6. In the **Secure Password** field, enter a password (minimum of 6 characters)
7. Re-enter the password in the **Confirm Password** field
8. Click **Save Settings**.