

Lumen AI — IT Setup Checklist

Hand this to your IT or operations lead. Most dealerships finish in under an hour.

1. Twilio account (texting)

- Create or sign in to a Twilio account:
<https://login.twilio.com/u/signup?state=hKFo2SB4WEhWbktmOHFU...>
- Purchase a local 10DLC phone number for the dealership.
- Copy **Account SID**, **Auth Token**, and the new **phone number** — you'll paste these into Settings → Texting in Lumen AI.
- Register the brand and campaign for A2P 10DLC compliance (Lumen guides you through it in Onboarding → SMS Compliance).

2. CRM access

- Confirm which CRM you use (VinSolutions, DealerSocket / IDMS, Reynolds, CDK, Dealertrack, or other).
- Identify one admin or manager user who can approve a new integration login.
- Have the CRM portal URL ready (e.g. <https://yourstore.vinsolutions.com>).
- If your vendor (Reynolds, CDK, Dealertrack, in-house) requires a signed data-access form, request the paperwork from your account rep.

3. Inventory feed

- Locate your existing inventory feed URL (HomeNet, vAuto, Dealer.com, etc.) — XML or CSV is fine.
- If you don't have one, ask your website provider for a real-time inventory export and forward the credentials.
- Confirm the feed refreshes at least daily; hourly is ideal.

4. Email & domain (optional but recommended)

- Decide which sending domain Lumen AI should use for outbound email (e.g. mail.yourdealership.com).
- Be ready to add 3 DNS records (SPF, DKIM, DMARC). Lumen provides the exact values during onboarding.

5. Network & devices

- No firewall changes required — Lumen is fully cloud-based.
 - Modern browser (Chrome, Edge, Safari, Firefox) on each user's workstation.
 - Mobile devices: any current iOS or Android works for the mobile dashboard.
-

Questions? Email support@lumenaiservices.com — we typically reply within an hour during business hours.