One Rooftop

Onboarding checklist | onerooftop.ai/onboarding-checklist

Have these ready and your store is live in one call.

Your onboarding call is 30 minutes. Everything on this page gets loaded while we are on it, so your finance managers can sign in the same day. Step 1: create your account at app.onerooftop.ai with the email of the person who will administer the store. We approve it on the call.

Product documents REQUIRED

This is the knowledge base. Every answer, quiz question, menu line, and proposal is grounded in what you upload, so completeness matters more than anything else on this list.

- [ ] Customer contracts for every F&I product you sell: VSC, GAP, tire & wheel, maintenance, appearance, key, dent, windshield, theft, bundles
- [ ] Brochures and sell sheets for the same products (the customer-facing versions)
- [ ] Coverage grids, term and mileage options, deductible options
- [ ] Current rate sheets or retail price guidelines by term, if you want the Menu Builder pre-loaded
- [ ] Claims procedures, exclusions lists, and cancellation or refund policies
- [ ] PDF format. Scanned image PDFs are fine; we OCR them.

Store details REQUIRED

Entered once in the dealership profile. The AI uses it to tailor coaching to your store.

- [ ] Store name as you want it to appear, address, main phone, website
- [ ] Brands sold (all franchises at this rooftop)
- [ ] DMS in use (CDK, Reynolds, Dealertrack, Tekion, other)
- [ ] Number of finance managers on staff
- [ ] Product providers and administrators, one line each ("VSC via Portfolio, GAP via XYZ, tire & wheel via ABC")
- [ ] Two or three sentences about the store: volume, new vs used mix, typical customer, what you want the finance office to do better

Your team REQUIRED

Invites go out during the call. Admins see Rooftop Analytics and session review; managers see their own work.

- [ ] Administrator: name and email of the GM, finance director, or owner who will run the store on the platform
- [ ] Each finance manager: full name and the email they will sign in with (Google sign-in works with Gmail and Google Workspace addresses)
- [ ] Who gets admin access besides the primary administrator, if anyone

Nice to have OPTIONAL

Not needed for day one. Add any time from Settings.

- [ ] Employee handbook, F&I process docs, word tracks, or a sales playbook. The assistant and roleplay coach follow them.
- [ ] Store rules you want enforced in coaching ("never quote a payment before the menu", "always offer the full menu on cash deals")
- [ ] Logo file for the customer-facing menu presentation
- [ ] A practice goal per manager per week, for the leaderboard and analytics
- [ ] Whether Live Coach may be used in the finance office (requires customer consent; off by default until you say so)

Not required, ever:

customer data, deal jackets, credit applications, or anything with a Social Security number or date of birth. One Rooftop runs on your product knowledge and your team's practice, not your customers' files.