CREDIT APPLICATION AND ECONTRACTING

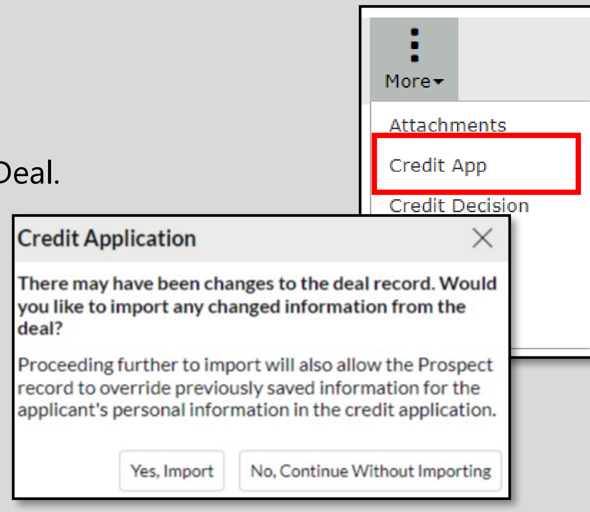
Administrator

VUE is a permissions-driven system that tailors security access to suit each users needs. Access to each menu item is managed by an Administrator at your dealership. See the Help article on Roles and Permission to learn how.

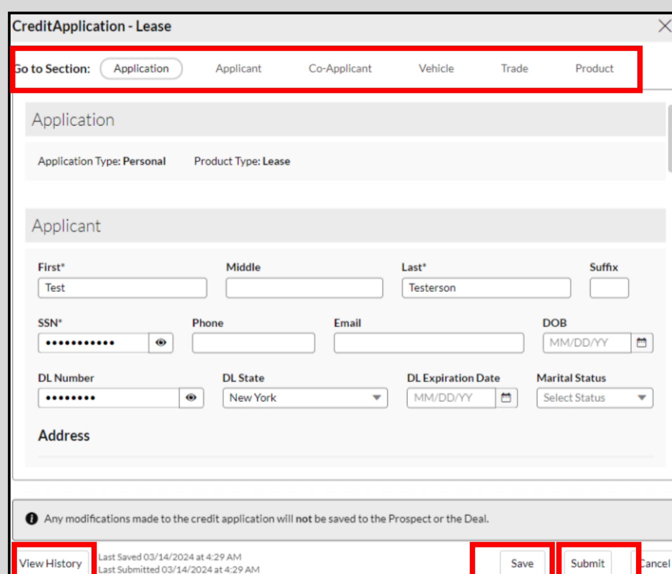
See the Permissions Reference Guide to understand what permissions to assign.

CREDIT APPLICATION - Within VUE

Sales and F&I



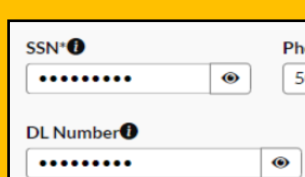
1. Navigate to Sales > F&I > Sales Desk or Deals
2. Filter/Sort the primary grid to locate the Sales Desk or Deal.
3. Click to select the corresponding line for the Sales Desk or Deal.
4. Hover over the **More** icon in the Action Ribbon and select [**Credit App**] from the drop down.
5. You are prompted to update the credit application with information from the Prospect and Deal screens. To proceed to the application, select [Yes] to import or [No] to to not import. NOTE: Based on your selection, required fields could be altered preventing the application from being submitted.
6. Update the Credit Application as needed. The tabs at the top of the Credit Application modal allow for quick navigation to the Applicant, Co-Applicant, Vehicle, Trade, and Product tabs. Asterisks indicate required fields.
7. The [Save] button only saves the information to the application, and the [Submit] saves and submits the application. NOTE: The [Submit] button appears once all required fields are completed.



Pro Tip -

The SSN and Driver's License fields offer a show/Hide icon. Permissioned users can toggle between Show and Hide, as well as add and edit the SSN and DL fields.

Users without permissions may not toggle, but they can enter a new SSN or DL to change it until the [Save] button has been selected.



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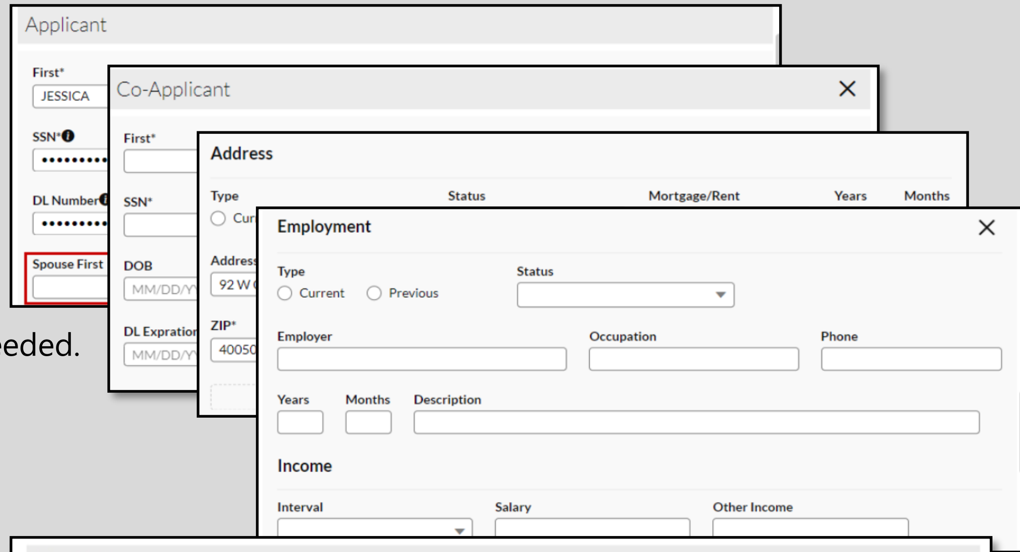
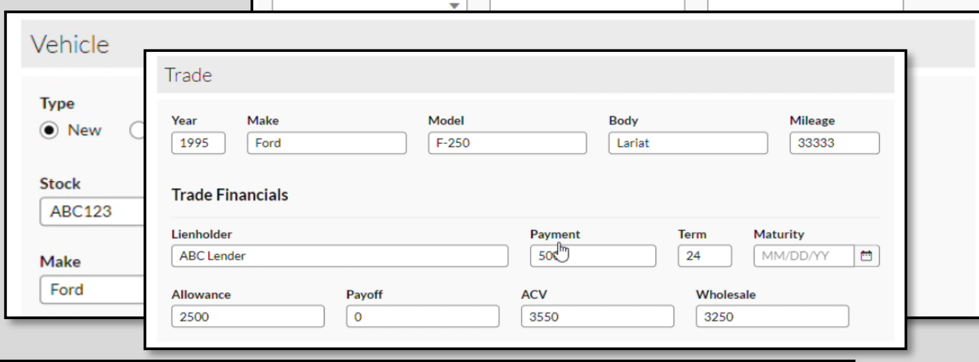
CREDIT APPLICATION

Applicant data, Co-Applicant, Addresses, Vehicle and Trade

Details are populated from the Prospect and Deal screens. Some fields are display only if they are relevant to the application.

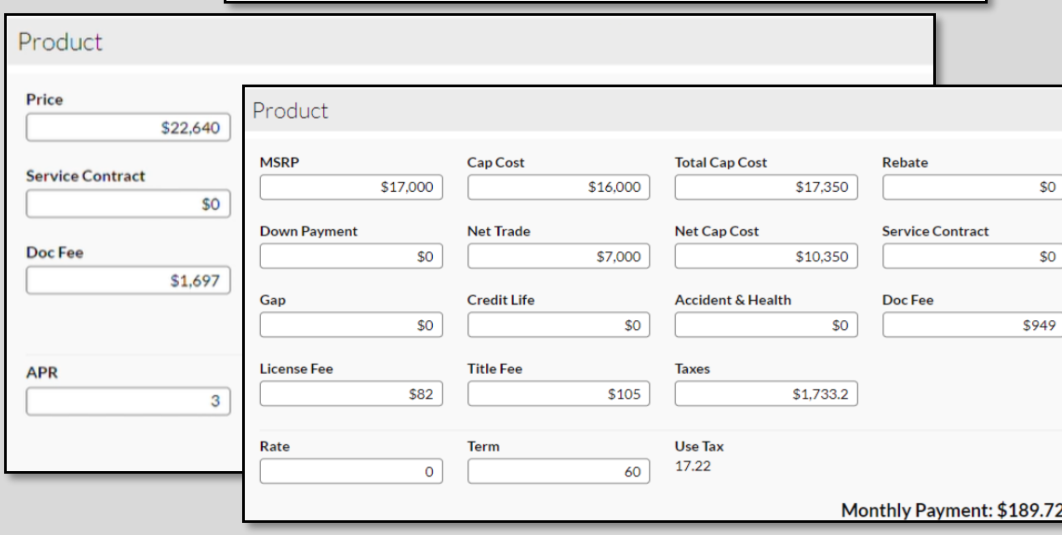
Employment and address history can be manually entered into the applicant sections as needed.





Product - Calculated fields are updated based on other values and are not directly editable within the Credit Application modal.

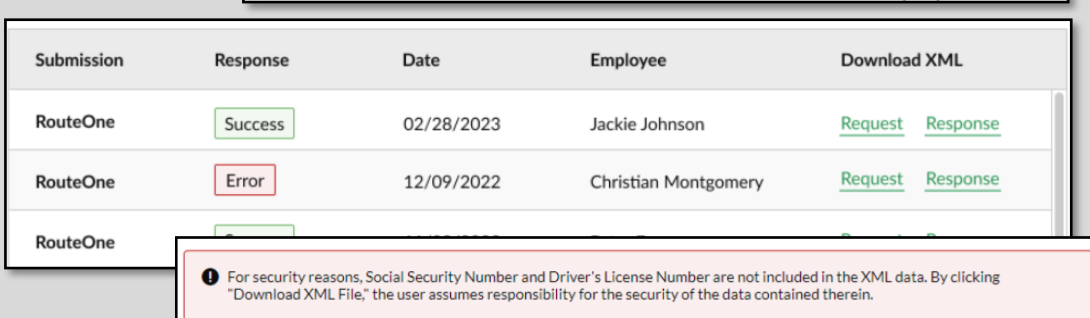
Important - Changes made in the Product section DO NOT update the Deal. They are only used for the Credit Application.



History - The History button appears after submitting a Credit Application to RouteOne.

Use the hyperlinks in the Action column to download the XML data.

SSN and DL information are not included in the XML data.



For Technical or Software Support, please contact:

1.800.227.8187 or email dmssupport@drivedominion.com

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