

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 <u>Roles and Permission</u> to learn how.

See the <u>Permissions Reference Guide</u> 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.
- 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.

SSN*		Ph
•••••	۲	5
DL Number		
•••••	•	•



o Section: Application)	Applicant	Co-Applicant	Vehicle	Trade	Product
Application						
Application Type: Personal	Pro	duct Type: Lease				
Applicant						
First*		Middle		Last* Testerson		Suffix
\$\$N*	Pho	ne	Email			DOB
DL Number		DL State		DL Expiration D	ate	Marital Status
•••••	۲	New York	•	MM/DD/YY		Select Status 🔻
Address						

CREDIT APPLICATION

Applicant data, Co-Applicant, Addresses, Vehicle and Trade	Applicant	
Details are populated from the Prospect and Deal screens. Some fields are display only if they are relevant to the application. Employment and address	First* JESSICA Co-Applicant X SSN* First* Address DL Number SSN* Type Status Montgage/Rent Years Months Spouse First DOB Address Type Status Status	<
history can be manually entered into the applicant sections as ne	Peded. UL Expration Version Version V	
Product - Calculated fields are updated based on other values and are not directly editable within the Credit Application modal.	Type Year Make Model Body Mileage Year Make Make Body Mileage Year Make Make Body Mileage Year Make Model Body Mileage Year Make Make Model Body Mileage Year Make Ford F-250 Lariat 33333 Trade Financials Lienholder Payment Term Maturity ABC Lender Soct 24 MM/DD/YY Mileage	
Important - Changesmade in the Product sec-tion DO NOT update theDeal. They are only used	Allowance Payoff ACV Wholesale 2500 0 3550 3250 Juct	1
for the Credit Application.	MSRP Cap Cost Total Cap Cost Rebate \$0 \$17,000 \$16,000 \$17,350 \$0 0 \$0 \$17,000 \$16,000 \$17,350 \$0 0 \$0 \$17,000 \$10,350 \$10,350 \$0 \$1,697 \$0 \$7,000 \$10,350 \$0 \$0 \$1,697 \$0 \$0 \$7,000 \$10,350 \$0 \$0 \$1,697 \$1,697 \$0 \$0 \$10,350 \$0 \$0 \$0 \$1,697 \$1,697 \$10 \$10 \$10,350 \$0 \$0 \$0 \$1,697 \$1,697 \$10 \$10 \$10,350 \$10 \$0 <t< td=""><td></td></t<>	
History - The History button appears after submitting a Credit Application to RouteOne.	3 \$82 \$105 \$1,733.2 Rate Term Use Tax 0 60 17.22 Monthly Payment: \$189.72	
Use the hyperlinks in the Action column to download the XML data.	eOne Success 02/28/2023 Jackie Johnson Request Response	
SSN and DL information are not included in the XML data.	eOne Error 12/09/2022 Christian Montgomery Request Response eOne Error Social Security Number and Driver's License Number are not included in the XML data. Budicidian	
	"Download XML File," the user assumes responsibility for the security of the data contained therein.	

For Technical or Software Support, please contact:

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