



# USER GUIDE MAY 2023

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# Welcome to 700Credit!

700Credit is the leading provider of credit and compliance solutions for the automotive industry. Our products and services have evolved through the years, as we continually collect feedback from our clients around the country. Our singular focus on the automotive industry has allowed us to create solutions that are easy to use and best fit the needs of our dealer clients. Today we have over 20,000 direct dealer clients using our products and services across the US.

#### **Credit Reports**

We offer access to reports from the leading national credit companies, Experian, Equifax and TransUnion. Credit Reports contain information from credit grantors, courts, and collection agencies regarding the historical loans by the consumer. Credit Reports also include scores (FICO and Vantage), and public records such as judgments, liens, and bankruptcies. They also may include previous employers, addresses and other names used. All 700Credit clients receive their choice of report format, score, and ancillary products.

#### **Red Flag**

A Red Flag summary is provided with each report pulled, to alert you to information that appears to be genuine on the surface but may be questionable. These warning messages focus on high-risk applicants, social security numbers, driver's licenses, and addresses. Currently, there are more than 31 patterns for Red Flag alerts.

#### **Out of Wallet Questions**

Out of Wallet (OOW) questions are available for every applicant processed through the platform. When a Red Flag alert occurs, your dealership must validate the person's identity. OOW questions are available instantly, providing multiple choice questions that would be hard for an identity thief to answer. If the consumer answers most the questions correctly, their identity is verified, and the alert is automatically resolved, allowing you to proceed with the transaction.

#### **Risk-Based Pricing Notices**

Following the National Automobile Dealers Association (NADA) and National Independent Automobile Dealers Association (NIADA) recommendations, our solution uses the Exception Notice option, otherwise known as Model Form B-4 and Model Form B-5, for those instances where a score is not returned on the consumer.





#### **Adverse Action Letters**

We have developed a base solution that follows industry best practice (and the best liability protection) to help keep you in compliance with federal and state laws and regulations. Our services can be tailored to fit your dealership's interpretation of the law and internal policies.

Revvable has integrated our credit, compliance and prescreen solution into their platform. This guide will walk you through how to pull/view prescreen and credit reports from within your Revvable platform. If you have any questions, please feel free to reach out to our support desk at: (866) 273-3848 or email us at: support@700Credit.com.



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#### Introduction to QuickScreen

Welcome to 700Credit's **QuickScreen** credit soft pull solution. QuickScreen is integrated with your **IDS** platform, so it is easy to access and easy to pull. Since it is a soft pull solution, you only need a consumer's name and address to pull their credit score and auto summary, with no adverse effect on their credit score.

QuickScreen gives you visibility into your customer's credit profile before you work a deal, so you can work the right deal, right away, saving time and preventing a potentially uncomfortable situation for your customer. QuickScreen can also help you provide the customer with a payment estimate based on the RV/Marine they are interested in. In addition, knowing the customer's current RV/Marine payment enables your team to have more meaningful budget conversation with the client, potentially shortening the sales process, getting you to the finish line faster.

#### QuickScreen returns the following data to the user:

- FICO Score
- Available Revolving Credit
- Auto Inquiries last 30 days
- Summary of Auto Trade Lines Including:
  - Current Monthly Payment
  - Current Auto Loan Interest Rate
  - Remaining Balance/Payoff
  - Payment History
  - Months Remaining on Auto Loans

QuickScreen Results 2 Score: 727 (Tier 1) Result: C ed by TU: FICO AUTO 08 ner Information: Email: Phone: jdoe@email.con (999)-555-1234 123 Main St. Auto Summary: ng Credit: \$3,881.00 Auto Inquiries last 30 days: 0 Auto Trade Line 1 SR Original Am \$12, 886.00 \$252.00 Joint NO S P \$296.00 Percent Paid Loan Type: Certificate Status: Printed By: Confirmed By: PRINT NOW

#### QuickScreen can be used in several scenarios within your dealership:

- To qualify and prioritize inbound and internet leads
- To mine for opportunities within your CRM
- To prequalify in-store and service lane customers





# **Prescreen Results**

After clicking "Prescreen", there are four possible responses:

- Pass/Score Provided The applicant met the score cutoff selected by the dealer and the
  prescreen criteria of the bureau.
- Fail/No Score The applicant did not meet the cutoff score selected by the dealer.
- **Decline** The applicant did not meet 1 or more of the following: (The reason for the decline is not returned/identified for your review)
  - Credit score is below 500 automatic decline per credit bureau Minimum age of 21
  - No open bankruptcies
  - Minimum 1 satisfactory trade
  - 1 open credit trade line 36 months old or older
  - Applicant has opted out of prescreen credit offers
     (https://www.consumer.ftc.gov/articles/prescreened-credit-and-insurance-offers)
- No Hit The applicant could not be found.

# Prescreen Response: Pass

A new window will appear that displays the customer's credit score, credit tier, and any payoff information that is available on their credit history. You will be able to print a Pre-Selected Certificate by clicking on the "**Print Now**" button that is circled on the prescreen results image to the right.

The dealer/user must then click on "**Yes**" or "**No**" if the Pre-Approval Certificate has been delivered to the customer.







If for any reason, the dealer/user clicks "No", then 700Credit will automatically send this certificate to our Mail House and the certificate will be mailed to the applicant.

The dealer will be charged for this mailing.

**Please Note:** Any certificates printed within 700Dealer.com to the dealership's local printer will not be charged. The dealer can print to their local printer for free.





#### Prescreen Response: Fail

If the Prescreen inquiry returns as a "Fail", the message will appear as:

In this case, no notice is required to be given to the consumer. In fact, the consumer doesn't have to know the process has taken place. Select "Continue" and the Applicant List is returned. The Applicant List will show all "Fail" returns as QS in RED, and the score/Tier will appear in parenthesis.







#### Prescreen Response: Decline or No Hit

The other two possible return messages are "**Decline**" and "**No Hit**". A "**No Hit**" signifies that no data was found on that particular consumer and a "**Decline**" means that data was found, however, the consumer did not meet the minimum criteria set up in the Configuration Guide.

In either case, no score will be shown in parenthesis in the Application List.

No Hit:	Certificate
	Customer was not found in database, please edit application and add additional information to search again.
Decline:	Certificate
	Applicant did not pass one or more of the pre-defined criteria in order to qualify.

Select "Continue" and the Applicant List is returned. The Applicant List will show all "**No Hit**" and "**Decline**" returns as **QS** in **GRAY** and a "D" will appear for a "**Decline**" and an "NH" will appear for "**No Hit**". The screenshot below is from our <u>700Dealer.com</u> platform, which every dealer has access to.

If you do not have your credentials to log in to this platform, please call our support desk immediately: **(866) 273-3848.** 

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#### Firm Offer of Credit - Compliance Requirement

Because a prescreen (QuickScreen) is performed without consumer consent, dealers are required by law to send a "**Pre-Selected Certificate**" and must be delivered to all consumers who "**Pass**" the prescreen inquiry AND the dealer must be able to prove the offer was delivered. The dealer has three options for certificate delivery. They can:

- Print the certificate at their local printer in the dealership and drop in the mail to the consumer
- Email the certificate to the consumer
- 700Credit can print and mail the Certificate on your behalf for \$1.05/letter.

Because we are the compliance experts in this industry, our system automatically monitors all prescreens that are run, and if the dealership does NOT print or email the certificate within 15 days of running, our system will automatically generate and mail the certificate to your customer. Dealers will be charged \$1.05/letter if this event occurs.

To the right is an example of our certificate template which will be customized to your store - and your clients.



# **OpportunityAlerts!**

**OpportunityAlerts!** are graphic icons that alert the dealer to potential opportunities in the soft pull results based on the color of the alert: Green/Yellow/Red.

A proprietary algorithm reads data from the QuickScreen results and presents the appropriate alerts accordingly. Alerts are available for the following data points:

- Credit Score (S)
- Interest Rate (R)
- Inquiries (I)
- Loan Term (T)
- Monthly Payment (A)
- Paid Percentage (P)







The **BENEFITS** of OpportunityAlerts! include:

- Quickly identifies opportunities that exist in the QuickScreen results
- Makes the QuickScreen product easier to read and easier to use
- Helps the dealer to focus on the data that will help them work and close the best deal
- Adds value and complexity to our product that make it more difficult to compete against

# **Set-Up Process**

To enable **OpportunityAlerts!**, navigate to the proper tab, as shown below, and check the "Enable QuickScreen Alerts" box (circled).

OpportunityAlerts! are triggered when the values returned from the QuickScreen hit the ranges that are defined in the "OpportunityAlerts!" tab in the Data Access menu in 700Dealer, as shown below. The values will be set at default ranges, however, once the dealer gets comfortable with alerts, they may want to customize the ranges to fit their specific store needs.

Below you will see the default values for Green, Yellow, and Red alerts. Dealers will need to fill out the box below, paying close attention to their score ranges and interests.

					Score Range	Probable Interest Rate
Score Alert	Green	Yellow R >= 675	Red = 674	Interest Rate 1	Greater than 725	1.5 %
Interest Rate Alert	B >= 2	□ >= 1	= >= 0.5	Interest Rate 2	Greater than 700	3.0 %
Inquiry Alert	8 >= 1	□ >= 0	□ >= 0	Interest Rate 3	Greater than 675	5.0 %
Term Alert	R <= 3	፼ <= 6	□ <= 8	Interest Rate 4	Greater than 650	7.0 %
Monthly Payment Alert	Ø >= \$600	💷 >= \$400	🗐 <= \$400	Interest Rate 5	Greater than 625	9.0 %
Paid Percentage Alert	80 >= 90	96 🖻 >= 85	96 🗉 <= 60 %	Interest Rate 6	Below 625	13.0 %





# **Pulling Prescreen & Credit Reports**

Beginning in the home dashboard of Revvable, select the "**Opportunities**" tab in the left-hand navigation panel.

Revvable	Opportunities - dev	Send credit app	Create Opportunity
© Opportunities	Open Closed		
🗟 Inbox	Q. Search opportunities		
Customers	Assigned To Status		
Payments	All results v All v Date to Date		Roset Filters
🔝 Financing	Weat Artis 84		
⊚ Settings ✓	M. Landra Leroni (La)		
	ID Created Customer Desired Vehicle	Status	Assigned To
	104 04/26/2023 🏷 🖾 Max Blanc	New Lead	
	0 103 04/25/2023 🖾 Test Customer	New Lead	
	😰 96 05/0/2023 🕅 Mariana Bia	FM	Addy Administrator
	95 03/0/2023      IM NEWNAME FORTESTNE	New Lead	
	94 02/17/2023      [2] maxwell blan;	New Lead	Addy Administrator
	😨 90 02/13/2023 🖳 test customer kawasaki	New Lead	Emily Employee
← Collapse Sidebar	0 89 02/09/2023 I test test	New Lead	
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Legest	0 87 02/08/2023 🕼 monthly housing	New Lead	
	0 86 02/07/2023 👔 test feb seven	New Lead	

Utilizing either the search bar or the filters, locating the desired consumer you want to pull a prescreen or credit report on. Select the consumer to open their profile.

a	Revvable						Opportu	nities	Send credit app	Create Opportunity
6	Opportunities						Open	Closed		
8	Inbox	 q	VALSA	има						×
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			ID	Created	Customer	Desired Vehicle			Status	Assigned To
			28	12/09/2022	📓 Joseph Valsamma	2022 Honda CBX 75	O F		Open	Emily Employee
÷	Collapse Sidebar									





Within the consumer profile, under the "Credit" section, locate the "Pull Credit" link.

💫 Revvable	K Back	Opportunity 28	No Action needed
Opportunities	OPEN	E Add note Add Payment Request	
평 Inbox ④ Customers 며 Payments	Joseph Valsamma View Customer tamartett@revvable.com   +1 (249) 827-3498 Cobuyer N/A Add Cobuyer	Ney 3ce - Addy	from MotoDog here, are you still interested in the bike?
<ul> <li>Financing</li> <li>Settings </li> </ul>	Assigned to Emily Employee Desired vehicle Unit 2022 Honda CBX 750 F Color Blue Stock AB370C	Note from Addy Administrator     Customer stopped by on Monday asking about the CIX/750. Sent payment request to	Addy Administrator: May 17, 2023   1135 AM Created on May 17, 2023   11.08 AM customer to submit downpayment to
	Tade in         2005 Ducati 350 Scrambler Milleage           Unit         2005 Ducati 350 Scrambler Monosour           Remaining balance         8500000           Bremaining balance         8500.000           Devin payment         5200.00 - \$1000.00           Monthly payment         \$200.00 - \$1000.00           Term inergith         36 Months	Poyment Request      50500 Created Description Desceptyment for Hands table	Created on May 17, 2023 [107 AM Updated on May 17, 2023 [107 AM 2
	Credit CFCRA Consent: complete FCRA Consent: complete TOO Credit Ottimized. 12274 Hard Inquiry	1	
← Collapse Sidebar (kj) kel jackson	Equifax FICO Auto 9-EFX-F 840 Experian FICO SCORE 9 AUTO 591		
Logout	FICO AUTO V8 596 FICO Auto V2 623		

**Note:** Within the **"Credit**" section, users can directly see the FICO scores of the previously pulled credit report. To view the 700Credit prescreen or full credit file within the iframe, select the eye icon under the **"Pull Credit**" link.

A pop-up window will appear, prompting the user to select either a soft inquiry (prescreen) or hard inquiry (full credit file). Next, check which bureau(s) you would like to use to pull the consumer's credit. Once finished, click "".

Revvable     Opportunities	Mileage Estimated trade in Remaining balance Desired payment terms Down payment Monthly payment	1,000 miles \$5,000.00 \$200.00 - \$1,000.00 \$100.00 - \$5,00.00	Payment Request  S00000 Created Description: Downpayment for Honds bile	Created on May 17, 2023   1107 AM Updated on May 17, 2023   1107 AM
	Term length	36 Months		·
	Credit			
	FCRA Consent: complete		×	
	700 Credit	Pulling customer cred	dit may result in charges	
	05/17/2023, 1:22 PM Hard In	You are about to pull curt	tomer credit which is subject to fees pre-agreed upon	
	Equifax	between MotoDog Demo	and 700 Credit.	
	FICO Auto 9-EFX-F	Inquiry Type		
	Experian	Soft Inquiry		
	FICO SCORE 9 AUTO	O Hard Inquiry		
	FICO Auto V2	Bureau		
	TransUnion	Equifax		
	TransUnion Auto Model 1.0	Experian		
	FICO Auto 08	Transunion		
	FICO Auto 04			
	05/17/2023, 1:21 PM Soft Inq		Cancel Pull Credit	
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	EX: FICO AUTO V8	596		
	Construction Descent			





The report (prescreen or full credit file) will then appear on screen in an iframe. From here, users can utilize the tabs at the top of the iframe to pan between each bureaus report, Adverse Action Letter, and RBPN. Users also have direct access to their Compliance Dashboard from within the iframe.







# Introduction to 700Dealer.com

As a customer of 700Credit, you have access to your own personal credit portal at <u>www.700Dealer</u>. com. You should have received your username and password in a welcome email from 700Credit. If you did not receive this email, or have misplaced it, please send an email to: <u>support@700credit.com</u> or call: (886) 273-3848.



# **Viewing Your Leads**

When you log in to 700Dealer.com, simply click on the **Applicant List** menu item in the left-hand column and you will see a list of all. You can select **Date Range** to view different timeframes.

By clicking on any name in the list, you can view their full credit report, red flag, and a link to their compliance dashboard. If a QuickScreen was run, you will see the QuickScreen results.

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#### **Compliance Dashboard**

Our Compliance Dashboard closely monitors your efforts to ensure compliance processes are being followed. Issues of concern are highlighted in red for quick identification. We support both single and multi-roof views, ensuring you have your finger on the pulse of every compliance aspect in your business. Items supported on the dashboard include:

- Red Flag Alert Status
- OFAC Compliance
- Adverse Action Letter
- RBPN

#### Lead Summaries for:

- QuickQualify
- QuickApplication
- QuickScreen
- QuickScore
- QuickQualify Xpress

#### **How You Benefit**

- Ensure compliance processes are being followed
- Identify immediately when/ where you are out of compliance
- Easily print audit reports
- Single and multi-point rooftop views

		#	%
Total Applicants		43	
Letters Mailed		34	79%
Letters Queued to be Mailed	View/Edit	4	9%
Letters Printed Locally		0	0%
Applicants with No Letter Delivered	View/Edit	5	12%
Adverse Letters Delivere	ed/Scheduled	38	88%

Risk Based Pricir	ng Notice Pro	ogram Mon	itor
		#	%
Total Applicants		43	
Notices Mailed		35	81%
Notices Queued to be Mailed	View/Edit	6	14%
Notices Emailed		0	0%
Notices Printed Locally		0	0%
Applicants with No Notice Delivered	View/Edit	2	5%
RBPN Notices Deliver	ed/Scheduled	41	95%
	Current RBPN S	etup	Request Setup Changes

Red Flag Alert Status		#	%
Total Applicants With Red Flag		38	46
Red Flag Clear & Cautions		9	24%
Red Flag Alerts		29	76%
Alerts Unresolved	View/Edit	<u>27</u>	
Alerts Resolved		2	
		Wo	rk on Unresolved
Consumer Alerts	View	Wa	rk on Unresolved
Consumer Alerts Fraud Victim and Security Alerts Active Duty Alerts	View	0 Wa	rk on Unresolved
Consumer Alerts Fraud Victim and Security Alerts Active Duty Alerts ID Verifications	View	1 0 #	vrk on Unresolved
Consumer Alerts Fraud Victim and Security Alerts Active Duty Alerts ID Verifications Complete	View	1 0 # 0	% 0%

	#	
Total Applicants	42/29	
	#	%
Total Applicants with OOW Presented	42	100%
Applicants Passed	3	7%
Applicants Failed	0	0%
Authentication Abandoned	3	7%
Questions Unavailable	36	86%

OFAC Co	ompliance	e				
OFAC Status	#	%				
Total Applicants With OFAC	39					
OFAC Alerts	0	0%				
OFAC Unresolved	VewEdt 0					
OFAC Resolved	0					





#### **Managing Users**

You can add, edit or delete users who have access to your customer, credit and lead information through the following process:

- 1. Log in to 700Dealer.com
- 2. Click on the "Users" link in the left-hand navigation bar
- 3. To edit a user's credentials, click the "Edit" link on the right
- 4. To delete a user, click the "Delete" link on the right
- 5. To create a new user, click on the "Copy" link on the right.

Administration								Search		<u>100</u>
Account Profile	$\Xi$	😤 Hide Inactive							-	
Online Invoicing	110	User10	Name	UserLevel	UserType	Status	Dealer	City	State	Action
its security		cartercountydigcudi	CU DL Interface	Dealer User	Gateway User	Active	Carter County Dodge Chrysler Jeep	Ardmore	OK	Edit   Delete   Copy
Dealers		cartercounty/digit:	Elend Solutions Interface	Dealer User	Gateway User	Active	Carter County Dodge Chrysler Jeep	Ardmore	OK	Edit   Delete   Copy
Users		cartercountydopg	ElendSolutionsPQ Interface	Dealer User	Gateway User	Active	Carter County Dodge Chrysler Jeep	Ardmore	OK	Edit   Delete   Copy
User Levels		cartercounty/hysicud	CU DL Interface	Dealer User	Gateway User	Adve	Carter County Hyundai	Ardmore	OK	Edit   Delete   Copy
Data Access		cartercounty/hyudc	Elend Solutions Interface	Dealer User	Gateway User	Active	Carter County Hyundai	Ardmore	OK	Edit   Delete   Copy
affers		ochyundaidicpq	ElendSolutionsPQ Interface	Dealer User	Gateway User	Adve	Carter County Hyundai	Ardmore	OK	Edit   Delete   Copy
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head bright to have		keystonechevyoudl	CU DL Interface	Dealer User	Gateway User	Adve	Keystone Chevrolet	Sand Springs	OK	Edit   Delete   Copy
veenu Leonop		keystonechevydrc	Drive-Centric Interface	Dealer User	Gabeway User	Active	Keystone-Chevrolet	Sand Springs	OK .	Edit   Delete   Copy
Subcode Lookup		keystonegbp	Gubagoo Interface	Dealer User	Gateway User	Adve	Keystone Chevrolet	Sand Springs	OK	Edit   Delete   Copy
Vojup- MAS Detail						12				

When you click on "Edit", you will be brought to a screen where you can make changes to the information.



# **Creating a New User**

Administration							Search			
ount Profile	✓ Hide Inactive									
ve trivolcing	User10	Name	UserLevel	UserType	Status	Dealer	City	State	Action	
ecurity	cartercountydigcudi	CU DL Interface	Dealer User	Gateway User	Active	Carter County Dodge Chrysler Jeep	Ardmore	OK	Edit   Delet	Copy
n	cartercounty/dig/c	Elend Solutions Interface	Dealer User	Gateway User	Anve	Carter County Dodge Chrysler Jeep	Ardmore	OK	Edit   Delet	Copy
	cartercountydopg	ElendSolutionsPQ Interface	Dealer User	Gateway User	Active	Carter County Dodge Chrysler Jeep	Ardmore	OK	Edit   Delet	Copy
avails	cartercounty/hyucud	CU DL Interface	Dealer User	Gateway User	Ative	Carter County Hyundai	Ardmore	OK	Edit   Delet	CODY
Loress.	cartercountyhyud:	Elend Solutions Interface	Dealer User	Gateway User	Active	Carter County Hyundai	Ardmore	OK	Edit   Delet	Copy
	ochyundaidopg	ElendSolutionsPQ Interface	Dealer User	Gateway User	Adve	Carter County Hyundai	Ardmore	OK	Edit   Delet	Copy
Facing Marine	fchavez	Frank Chavez	Dealer Admin	ODE User	Active	Carter County Dodge Chrysler Jeep	Ardmore	OK	Edit   Delet	Copy
Logic access	keystonecheryoud	CU DL Interface	Dealer User	Gateway User	Adve	Keystone Chevrolet.	Sand Springs	OK	Edit   Delet	Copy
Lookup	keystonechevydrc	Drive Centric Interface	Dealer User	Gabeway User	Active	Keystone Chevrolet	Sand Springs	OK	Edit   Delet	Copy
de Lookup	keystonegbp	Gubagoo Interface	Dealer User	Gateway User	Active	Kinystone Chevrolet	Sand Springs	OK	Edit   Delet	Copy
Intel					12					





To create a new user, it is easiest to find a similar user id, and select the "Copy" action, as highlighted in the previous step.

You can then fill in the new user information and make any changes in the setup necessary.



# **Viewing Invoices**

Dealers can also view their monthly invoices online by selecting the "**Online Invoicing**" tab in the left-hand menu.

Administration	Invoice Date: 11-11-2018 •	Monthly Bills are available for 6 months	
Automatica A	Billing Summary		
Online Investory Servicency Dealers Users User Events Data Access Letters Credit Engine Manitor User/D Loskup Subcide Loskup Papup DAS Datai	Invoice Humber: 663347 Pat Due Balance Current Activity Invoice Total Online Payments Auto Payments	\$0.00 \$1285.30 \$1295.30 \$0.00 \$0.00	Forms 2014 Decision Control And Low Hard Control C. One Time Prevent Autocardon form C. Core Time Prevent Autocardon form Sarahiry: MORIA & ASOCIATES LLC MOV- MIRVOR
Applicant List	Balance due by 12/11/2018	\$1295.30	
New Applicant	Manage Profiles	Pary Norw	
B Compliance	Payments made over phone or through ma	all after invoice date are not reflected in BALANCE	shown here
📝 Usage Analysis			
Administration	Invoice Details		
Dealer Summit	ELK GROVE KIA 8480 LAGUNA GROVE DR ELK GROVE CA 95767	INVOICE	<b>700</b> Credit
Cards Diad Data	Imaging Number: 605247		Date: 11/11/2018

You should have been sent your <u>700Dealer.com</u> login credentials in one of our welcome emails to you. If you cannot locate your credentials or have any questions, you may send us an email or give us a call at the following: Support: (866) 273-3848 (Option 4) or <u>support@700Credit.com</u>.

