



Thanks for choosing to take advantage of the many features and benefits of Autoclick.

This feature will allow you to link your Dealerships Credit Acceptance online credit application to the following:

- Dealership Website
- Computer Desktop
- Email Hyperlink

You will receive an email notification once an application has been submitted.

Dealership Website:

Step 1: Accessing Client Credit Information

There are several ways to use the secure credit app link. You can elect to integrate it into your website, use it on your desktop, within the Autoclick system or include a link in an email. One of the first things you will want to do is print the application. First, to logon to Autoclick (go to www.autoclick.com; click the Log-In link in the upper right).

To access your client's information go to either of the screens shown below:

1. Homepage/MyDashboard

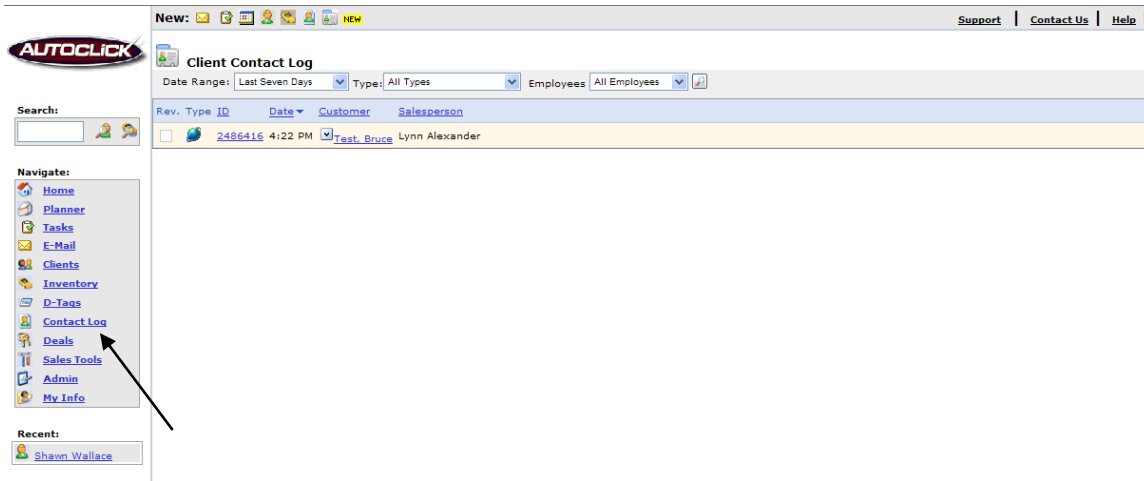
The Homepage, also known as My Dashboard, it is the first screen that is displayed after you login into Autoclick. Located at the top of the Home page you will find the Sales Pipeline Summary. In this section is a list of all of your active leads that are in the market to purchase a vehicle.

The screenshot displays the Autoclick My Dashboard interface. At the top, there is a navigation bar with the Autoclick logo, a search bar, and links for Support, Contact Us, and Help. Below the navigation bar, the main content area is titled "My Dashboard" and features a "SALES PIPELINE SUMMARY" section. This section includes a table with columns for "Type", "Customer", "Salesperson", "Date Entered", and "Last Event". The table lists three active leads: "Test, Bruce" (LA, 1/30/2007, Client Contact), "Wallace, Shawn" (1/22/2007, Client Contact), and "Wallace, Shawn" (1/19/2007, Appointment). Below the table, there are options to "Mark Selected as Inactive" or "Assign Selected clients to" a specific employee. The interface also includes a "TASKS" section with a view selector (Incomplete, All of My, Due Today and Overdue) and a "RECENT" section showing the user "Shawn Wallace".

Type	Customer	Salesperson	Date Entered	Last Event
	Test, Bruce	LA	1/30/2007	Client Contact (1/30/2007)
	Wallace, Shawn		1/22/2007	Client Contact (1/22/2007)
	Wallace, Shawn		1/19/2007	Appointment (1/19/2007)

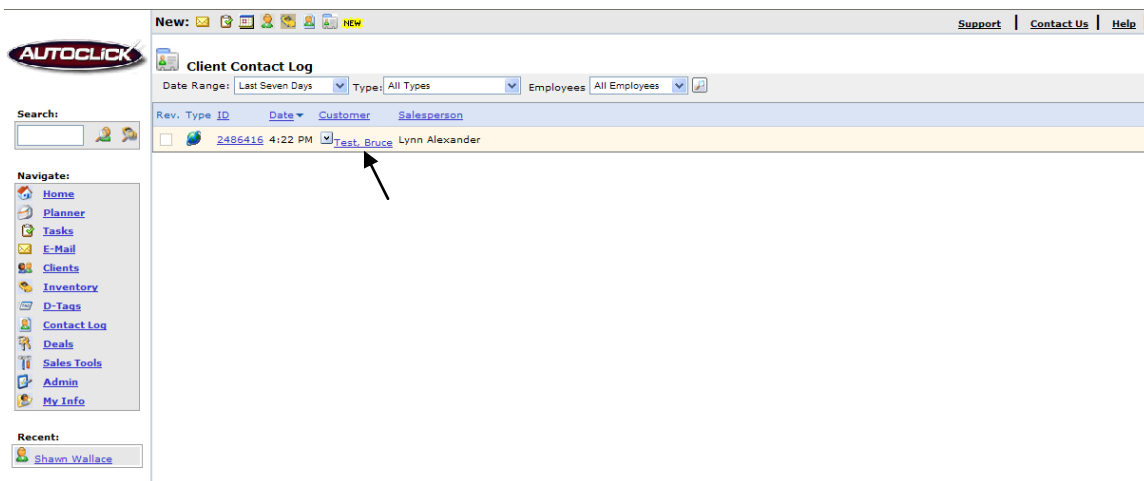
2. Client Contact Log

You can access this screen by clicking on Contact Log located in your Navigate Bar on the left hand side of your screen. The Contact Log displays your last 7 days of leads in chronological order.



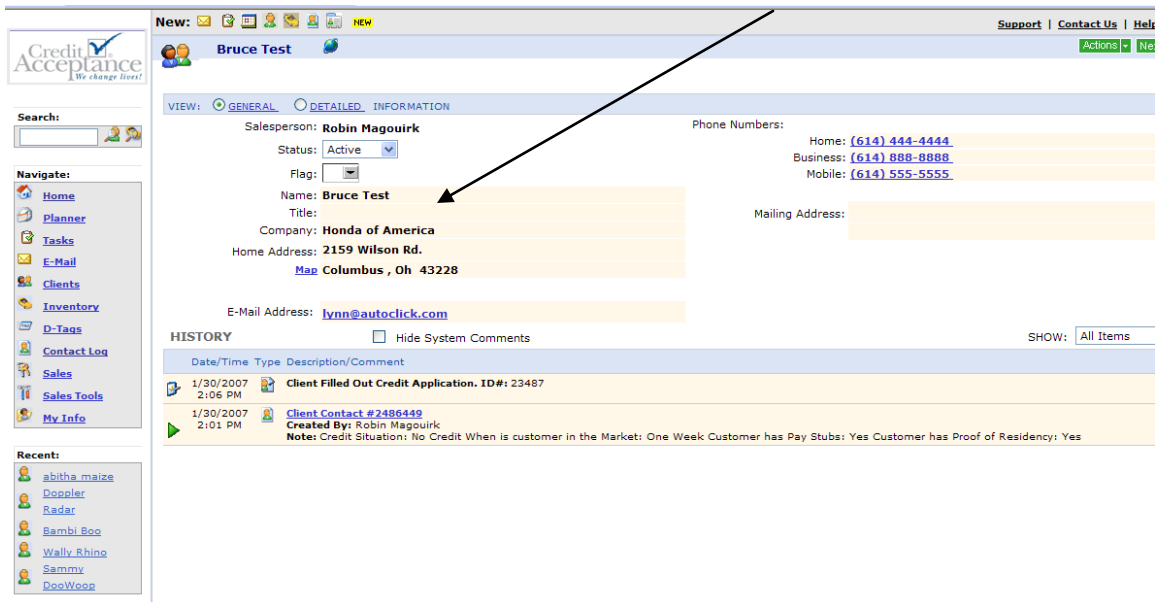
Step 2: Obtaining your Customers Credit Application information

Either from the Homepage or the Contact Log click on the name of your customer.

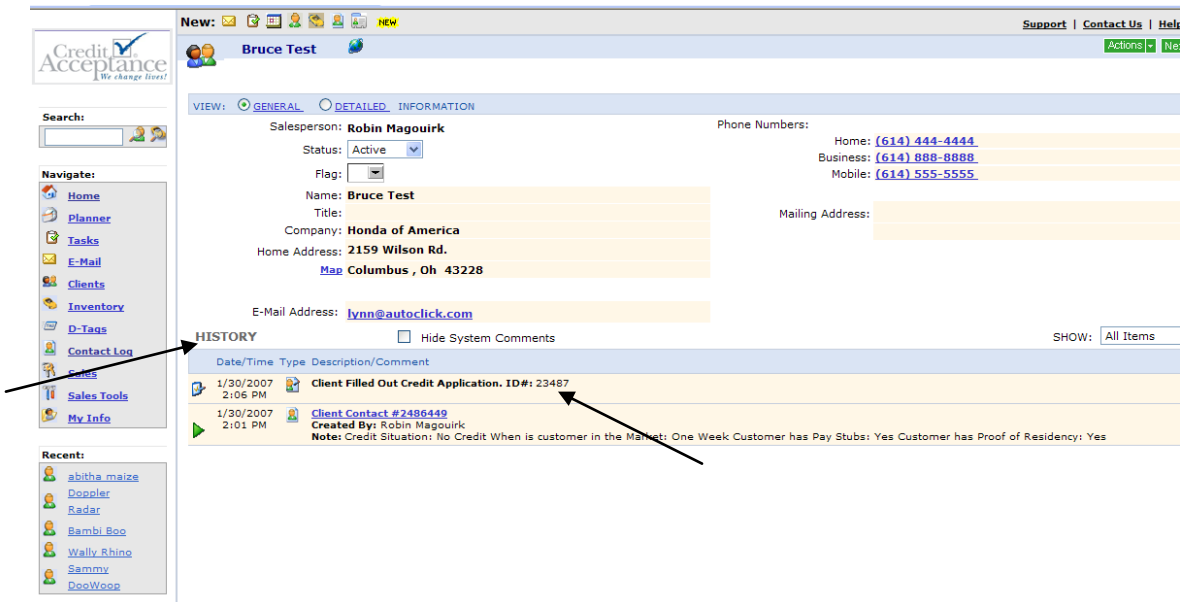


After clicking on the customer name you will be taken to the Client Information screen. The Client Information screen displays detailed client contact information at the top of the screen. Some of the detailed information includes:

- Name
- Address
- Email Address
- Home and Business Telephone Numbers



At the bottom of the screen you will find the History section. This section displays everything that has occurred with this customer. If the customer has completed a credit application you will find the notation “Client Filled Out Credit Application. ID# 23487” information as shown below:



Step 3: Display and Print Customers Completed Credit Application.

To display and print the application simply click on the application’s ID #. This will open up the credit application. You will need to scroll to the bottom of the application and select Print.

The application will be shown in a PDF format as shown below.
Go to the top of your screen or toolbar and click on the print icon.


Charles Hart Autos
11 Willow Way
Boulder, CO 83748
Phone: 800-418-8450

CONSUMER CREDIT APPLICATION
Application Date: 10/28/2013

CONTACT Fred Jones		PHONE NO. 800-418-8450	
APPLICANT INFORMATION			
Full Name Test Craig Autoclicker	Birth Date 01/01/1944	Drivers License	SSN 123456789
Current Address 454 Willowbrook Boulder, CO 54554	Home Phone 333-444-5555	Cell: 222-111-4444	
	Rent / Own 4	Mort. Payment or Rent per month 500.00	Time at Address 8 yrs 0 mos
Previous Address (reqd. if less than 2 years ar current address)			Time at Prev. Address
Employer Name Wendys	How Long? 15 yrs 0 mos	Occupation	Work Phone 222-111-7878 x
Gross Monthly Salary 2,500.00	Other Monthly Income (opt.)	Source (opt.)	Total Monthly Income 2,500.00
Previous Employer Name	How Long?	Occupation	Phone No.

Note: if the customer's information does not display inside the application you may need to click Options at the right hand side of your screen and select Add Host to Privileged Locations.

Step 4: Editing the Customers Completed Credit Application.

If you need to edit the customers information on the credit application before printing click on the edit icon , located to the left of the credit application in the customers history.

New: **NEW** Support | Contact Us | Help

Tonya Test Actions | Next

VIEW: GENERAL DETAILED INFORMATION

Salesperson: **Robin Magouirk** Phone Numbers: Business: (614) 898-8888
Status: Active Mobile: (614) 244-2444
Flag: Home: (614) 222-2222

Name: **Tonya Test**
Title:
Company: **Symeron Software**
Home Address: **223 Bridle Rd.**
[Map](#) **Columbus, Oh 43228**

E-Mail Address: lvnn@autoclick.com

HISTORY Hide System Comments SHOW: All Items

Date/Time	Type	Description/Comment
2/27/2007 1:19 PM		Client Filled Out Credit Application. ID#: 24097
1/2/2007		For: Robin Magouirk Description: Perform 14 Day Unsold Custom Task
1/2/2007 12:00 AM		Comment Created By: SYSTEM This client was processed by the AutoClick Automated Follow-Up System (14 Day Unsold Follow-Up)
12/22/2006		For: Robin Magouirk Description: Send 3 Day FirstTime Follow Up Letter
12/22/2006 12:13 AM		Comment Created By: SYSTEM This client was processed by the AutoClick Automated Follow-Up System (3 Day First Time Follow-Up)
12/20/2006		For: Robin Magouirk Description: Perform 1 Day FirstTime Custom Task
12/20/2006 12:13 AM		Comment Created By: SYSTEM This client was processed by the AutoClick Automated Follow-Up System (1 Day First Time Follow-Up)
12/19/2006 9:02 PM		Client Contact #2467256 Created By: Robin Magouirk Note: Credit Situation: Not Entered When is customer in the Market: Not Entered Customer has Pay Stubs: Not Entered Customer has Proof of Residency: Not Entered

Once you have clicked on the edit icon the original application the customer completed will be displayed allowing you to make any needed changes.

After you have completed entering your changes to the credit application, you will need to click on Save & Submit. This will allow for the corrected application to be submitted.

Step 5: Display and Print Customers Revised Credit Application

To display and print the revised credit application click on the customer credit application ID number in the History section that was detailed in Step 1.

Note: Although the application is edited and resubmitted, the application ID number will remain the same.

The screenshot shows a web interface for a customer named Tonya Test. The 'GENERAL' tab is selected, displaying fields for Salesperson (Robin Magouirk), Status (Active), Flag, Name (Tonya Test), Title, Company (Symeron Software), Home Address (223 Bridle Rd., Columbus, Oh 43228), and E-Mail Address (lynn@autoclick.com). Phone numbers for Business, Mobile, and Home are also listed. Below this is a 'HISTORY' section with a table containing one entry: 'Client Filled Out Credit Application. ID#: 24097' dated 2/27/2007 at 1:19 PM. A black arrow points to the ID number in the history entry.

Credit Application on Computer Desktop

Another option for the secure credit app is to place a shortcut on your desktop. This is very convenient when completing applications for customers who have either walked in or called your dealership and are in the market to purchase a vehicle.

To add the shortcut to your computer's desktop navigate to the credit application URL, right click on your mouse and select Create Shortcut. This will place the following icon on your computers desktop.



To access your credit application double click on the shortcut icon. The application will then be displayed allowing you to enter the applicants' information.

CREDIT APPLICATION

PERSONAL INFORMATION

First Name: Tonya
Last Name: Test
Birth Date: 1/20/69
SSN: 123456789
Email Address: lynn@autoclick.com
Street Number: 223
Street Name: Bridle Rd. Apt. #:
City, State ZipCode: Columbus, Oh 43228
How Long? 7 (Years) (ex:-1) 0 (Months)
Rent / Own: Own
Monthly Payment: 650.00 (\$)
Landlord / Mortgage Co.: JP Morgan Chase
Landlord Phone: (614) 555-5555
Home Phone: (614) 222-2222
Work Phone Number: (614) 888-8888 x
Other Phone Number: (614) 244-2444
Checking Acct. Bank: JP Morgan Chase
Savings Acct. Bank: JP Morgan Chase
Direct Deposit Bank: JP Morgan Chase
Nearest Living Relative: Tini Test
Relative's Address: 333 Cridle Rd.
City, State ZipCode: Columbus, Oh 43228
Phone Number: (614) 777-7777

[Add Co-Buyer/Co-Applicant](#)

EMPLOYMENT INFORMATION

Current Employers Name: Symeron Software
Employer's Address:
City, State ZipCode: ,

Include the Credit Application Link in an Email

The third option for the secure credit app link is to include the credit application URL or hyperlink in emails you send individually or through campaigns. You can include your URL as a link that will direct your client's to your credit application. You can also hyper-link the credit application into your email. To do this type the words you would like to make your link. For example: **CLICK HERE** to fill out our Guaranteed Financing Application. The words **CLICK HERE** will open the credit application, but first you need to highlight them and locate and click on the hyperlink icon, which looks like a chain link. Then paste the credit application URL inside the URL box and click ok or save. Once the customer completes and submits the application, you will be able to access and complete the credit application process by following the instructions listed above, beginning with Step 1.