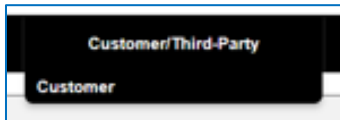# CREATE/SEARCH/UPDATE A CUSTOMER

1) To create a New Application you must start with a **Customer Search**
   a. Click on the **Customer** link on the menu bar.

   b. In the **Legal Name** box, type either the full customer name or a partial name. You can use the * as a wild card. Ex: *logistics. Our recommendation is to search by Federal Tax ID due to similar company names.

   c. Click the **Search** button at the bottom of that screen
      i. *If it is an existing customer* the customer names will appear below the search boxes (go to #2 below).
      ii. *If customer does not exist* then click on the **New Customer** button that appears below the search area.

      iii. For the Federal Tax ID, *do not include the dashes*.
      iv. ALL new customers require filling out information for the following three tabs: **Registered Address, Billing Address & Business tabs.**
      v. Fill out all required fields (indicated in red) and complete any optional fields you want to include. Any updates here will flow through to the customer application. **(Proceed to #2)**

2) Updating an existing customer
   a. Search the customer you want to update.

   b. You can update the customer information such as insurance, MLA number/date, registered/billing addresses and other fields within the record.

c. Once you save changes to an existing record, ***this is only initiating a request*** to the TCF Credit group for review and processing.

d. Once the changes are approved by TCF Credit Group, the information will propagate to all applications and setups. Due to this, it is recommended that MLA number/date and insurance information to be updated to avoid re-entry during application/setup stage.

CREATE A NEW APPLICATION

3) Create Application: Click on the customer's **Legal Name** and then
    a. Click on the **New Application** link in the navigation pane on the upper left

    b. OR **Expand** the little square box ☐ which will display the Dealer Reference Number
        i. Then click on the **Create an Application** icon
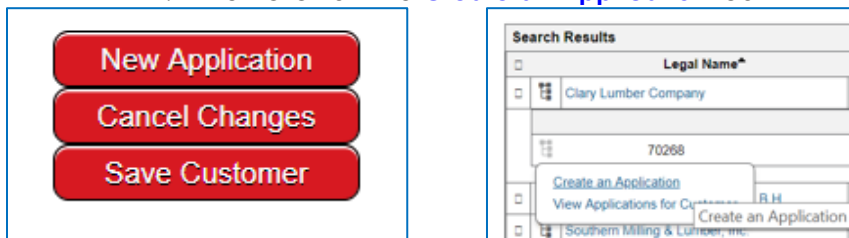
4) Click on the **New Application tab** and a **Select Program** window with a drop-down box appears:
    a. Select **Line of Credit, Commercial Equipment** or **Commercial Truck**
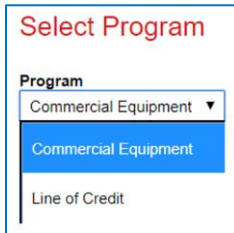
    b. Select the appropriate type and click the **Continue** button
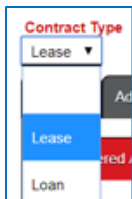
LINE OF CREDIT
    a. **Credit Amount Requested** populate with an estimated dollar amount.

    b. **Contract Type** is auto-populated with Credit Line

    c. Does not lock in program pricing, i.e. rate and residuals are not locked in, just dollar amount.

    d. Once approved, you still need to submit an individual credit application in order to lock in the pricing and create setups.
        i. Individual credit application is auto-approved once it submitted.

    e. Generally, the credit line is only good for one year or a time specified by the TCF Credit Group.
        i. Once the line is expired or the amount is exhausted, the individual credit application will go into the Pending Decision queue for TCF Credit Group to review.

**<u>COMMERCIAL EQUIPMENT OR TRUCK</u>** (refer to steps 5-13 below)

5) Fill out all required fields (indicated in red) and complete any optional fields you want to include
    a. **Dealer Number** will auto-populate.

    b. Validate **Customer Name, Registered Address, and Billing Address** (this is auto-populated from the customer record).
        i. If needed, you can change the **Billing Address** for this application in this step.

6) Next Step: Fill out all the red required fields.
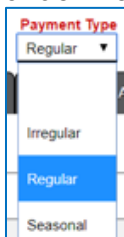

    a. Click on the **Contract Type** drop-down box and select **Lease** OR **Loan**

    b. If lease is selected then **Financing Type** will auto populate with Closed End Lease, however, you can choose any structure here, i.e. 2 Term or 3 Term.
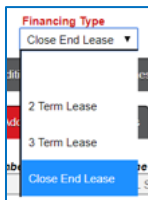
    c. Input **Term**

    d. Under the **Payment Type** select Regular

        i. **Regular** is the most common Payment Type, i.e. 36, 48, 60 month leases/loans.
        ii. **Irregular** is truly an irregular payment structure. Please contact your RSM for the structure. If this is selected, you must input the value under the Irregular Rent Tab.

iii. **Seasonal** is used for repeating annual amount, i.e. 8 payments on and 4 payments off throughout the entire term. If this is selected, you must input the value under the Seasonal Rent Tab.   *NOTE: For the month(s) with no payment, 0 must be inputted.*

e.   Under the **Frequency** select Monthly

f.   **Start Date, First Payment Date and End Date** will auto-populate based on the term and can be updated during setup creation. (These fields are required to calculate payment.)
NOTE: Contract start dates cannot be a month-end date of 29, 30 or 31. TC3 will display error message that needs to be fixed prior to submitting the application.

Flex Leases - 2 Term or 3 Term Lease
The first term is similar to inputting one asset. For the 2nd or 3rd term, in order to calculate the monthly payment, you will need to click on the earth picture.


INSURANCE TAB
7) Click on **Insurance Info** tab and complete all appropriate fields (Click Same as Liability under Physical Damage Tab)
Insurance information is not required during the application creation. However, if you do have information and input it when creating the application, it will flow through to the documentation phase.
a.   **Loans** require only **Physical Damage Insurance.**

b.   **Leases** require BOTH **General Liability** and **Physical Damage Insurance.**

c.   **Self-Insured** applications require TCF approval.

d.   Insurance information is required during contract setup creation

GUARANTOR TAB
8) Select Add to Add a Guarantor. Once completed the Guaranty form will be required at the Documentation stage.
a.   This will open a new page for you to search at the Customer level for a Guarantor. If existing select the guarantor. If new customer (most likely), refer to step one on creating a new customer.
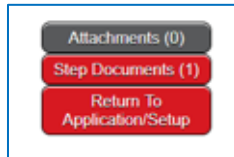
b. Once you select the Guarantor you need to select the **Type.** Individual would be Personal Guarantor and Business would be Cross-Corporate Guarantor.
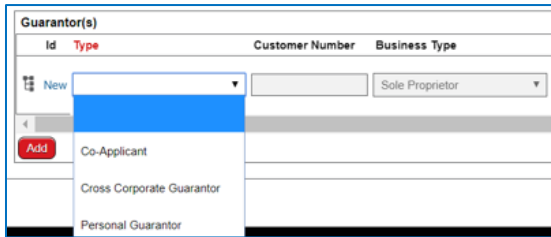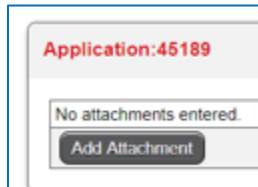

c. Please attach signed credit application to the application prior to submission for review.
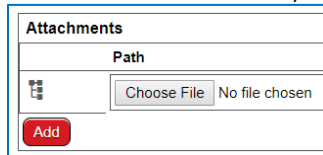
    i. Click Documents from the navigation menu
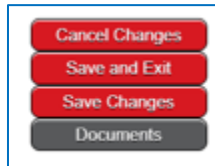
    ii. On the next screen, click on the Attachments link
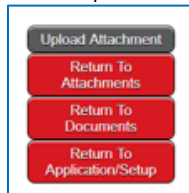

    iii. Click Add Attachment link

    iv. Click Choose File, a browser will pop-up for you to select the file you want to attach, select the file. You may add more attachment by clicking on the Add link.

    v. Click Upload Attachment

NOTE: This tab can be blank if a guarantor is not conditioned on the credit approval or could be added by the TCF Credit Group.

ASSET TAB (For TMHU CRM quotes See Easy Button Appendix, page 20 below)

9) Select **Asset** tab to add asset Information and pricing item conditions on all Equipment and Truck Applications.

   a. Click the Asset **Add** button and complete all required red fields.

Address	Additional Contacts	Business	Insurance	Guarantor	Asset	Comments	Return Conditions

   Asset(s)
   Id
   No Items found.

   [Add]

   b. Select **Class** first, then the drop-down list of corresponding Models will become available

      i. **Capacity** and **Series** auto-populate after the **Class** and **Model** are entered.

   c. You may add more than one <u>asset type</u> to the same credit application by clicking the **Add** button contained in the **Asset** tab.
   NOTE: If you enter a quantity of more than one, you must enter the amount financed of a single unit. TC3 will automatically calculate the quantity multiplied by the single unit cost and input that into the total financed as well as other cost fields.

   d. Net Equipment Cost is the Total Factory Cost on the CRM worksheet minus the Freight and Load Charge.

Eq. Freight Charge	$	−412.00
Eq. Load Charge	$	−10.00
Total Factory Cost:	$	24,076.30

   e. Enter any additional discounts from page 1 of the CRM worksheet in the ADDITIONAL TIE DISCOUNT field in TC3. The attachment cost will populate when entering attachments in the attachment tab.

   f. TC3 CRM Calculation is the total cost in TC3 multiplied by the residual percentage. This value is the EXACT residual amount calculated on the CRM worksheet and in the residual amount on TC3. If both calculations are not the SAME, then there is an issue with the cost, or the residual percentage listed on TC3.

   g. **Asset Condition** and **Annual Hours** are based on the results of your Survey Report and only applicable to Operating Leases.
   *NOTE: Only **Asset Condition** and **Annual Hours** are input into TC3. You must still provide the survey to the customer to complete and an executed copy must be forwarded to the Funding Group along with the funding package for review and processing.*

   h. Screen shot of all red required fields completed.

Category	Type	Mfg	Class	Model	Capacity	Series
Forklift	Forklift	Toyota	1	8FBCU20	4000	B800

Asset Condition	Year of Make
New	2018

Annual Hours	Operating Conditions	Full Maintenance?
2000	Clean	☐

Quantity	Net Equipment Cost Per Asset	Additional TIE Discount	Toyota 360 Cost	Total Attachment Cost	Total Cost Per Asset
1	35,000.00	100.00			35,000.00

i. **Multiple Assets - Replication**
    i. You have the ability to create additional assets of equipment/trucks within a single application. This will assist with multiple asset deals.
    ii. Once you crate the first asset, click on the Replicate icon.

    Add | Replicate | Delete | List
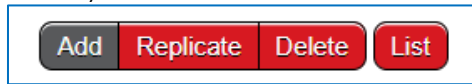
    iii. This will open a 2nd screen that will allow you to replicate as many assets as you want on one application as long as they have the same term. In this example, 2 line items will be replicated.

    Replication: Asset(s)

    Number of Replications

    | 2 |

    iv. Next, you will input the number of quantity on each of the replicated line item. In this example, quantity of 2 will be replicated on each line item.

    Replication: Asset(s)

Asset(s)	
Id	**Quantity**
New	2
New	2

    NOTE: *Once you replicate an asset line, you can still go into the replicated line item to edit any fields/parameters. However, once an application is submitted, all fields are locked down.*

ASSET PRICING TAB

10) Further down the screen is the **Asset Pricing** tab
    a. Input the **Amount Financed**

    b. Click the **Program Type** drop down and you will get a list of all current programs offered by TCF.

    c. Screen shot of all required fields inputted except for Program Rate and Contract Rate (those will be auto-populated once you click on **Calculate Pricing Quote**.

Total Amt Financed	Financed Up Front Tax	Max Advance	Dealer Adv Guaranty	Actual Adv %	Std Adv %
41,000.00		42,120.00	0.00	116.81	120.00

Program Type	Program Month	Program Rate
New Toyota	May	

Markup/Buydown Type	Markup/Buydown	Contract Rate

Residual Type	Program RV %	Program RV $	Dealer RV $	Dealer RV Guaranty	Actual RV $
Calculated	31.00000000	10,881.00		0.00	10,881.00

Term	Base Payment	Maintenance Payment
60		

    Purchase Option
    ☐

Asset Tax Exempt?	Certificate Attached?	Certificate Number
☐	☐	

d. Click **Calculate Pricing Quote** link on the left hand navigation menu.
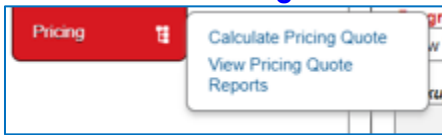
NOTE: *Add any attachments prior to clicking on the Calculate link*

e. A **Pricing Quote** window appears

f. <u>If it is correct, click</u> **Continue.** If it is not correct, click **Cancel** then make your corrections and click Calculate Pricing Quote again.

g. The system then auto-populates the **Program Rate** and **Contract Rate**

h. Screen shot of all completed red required fields as well as clicking on **Calculate Pricing Quote**.

i. Rate Mark Up/Buydown – If you are marking up or buying down the rate, then you can add the % in the Mark up/Buydown field.
  i. Mark Up – Rate Participation will be calculated and paid out through ACH at time of funding.
  ii. Buydown – Buying down the rate is typically a business decision by the dealer and will be at the expense at the dealership. This amount will be deducted from ACH at time of funding.
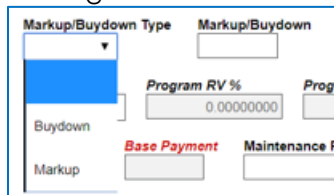
NOTE: *Do not use the buydown field in order to bring a rate exception down. Please contact the TCF Credit Group to adjust the rate*
  iii. Once you use Mark up/Buydown field, you must click Calculate pricing Quote to calculate the new payment.

ATTACHMENTS TAB

11) If you want to add any attachments e.g. batteries/chargers, click on the **Attachments** tab (*located at the bottom of the screen – next to Asset Pricing*)
   a. Click the Attachments **Add** button at the bottom of that screen.
      i.   Complete all required red fields on the **Attachments** tab.
      ii. **Total Cost** will auto-calculate and will auto-input the amount into **Attachment Cost** at the top of the screen.
      iii. You may delete an attachment item by clicking on the **Trash Can** icon.
      iv. You may add additional item by clicking on the Add icon.

   NOTE: *All attachments must be linked ONLY to the corresponding asset type. Ex: If you are only adding an attachment to one lift then you will need to add that attachment under that asset.*

SHIPPING ADDRESS TAB

12) Click to validate the **Shipping Address**
   a. TC3 auto-populates with the **Same as Registered Address?**

   b. Click to unmark the checkbox if you want to change the Shipping Address.

   c. If the unit is approved to garage in Canada/Mexico, complete the Sublessee section.

COMMENTS TAB

13) Complete this tab for any information that you would like to advise TCF credit of in regards to the application, customer, etc., e.g. down payment or trade-in offered.
   a. **Application Comments** would include Dealer credit notes.

   b. **Contract Comments** would include Dealer exceptions for contract setup.

SAVE CHANGES & SUBMIT APPLICATION

14) Click on **Save Changes** in the navigation pane.

15) Submit the application by clicking the **Submit Application** link in the navigation pane
   a. Once the application is submitted, it will leave your Dealer queue and be sent electronically by TC3 to the TCF Credit Group for review.

b. To locate the **Application Number**, click on **Application Search** in the navigation pane.

   i. Enter the **Customer Name** and click on the **Search** button OR hit **Enter** on your keyboard. The application will show as **Pending Decision**

NOTE: *You may want to save the Application Number for your reference since it is no longer in your dealership's Unassigned or My Worklist queues.*

APPLICATION APPROVAL / STATUS

16) Your submitted application will be reviewed by the TCF Credit Group. Once the TCF Credit Group has reviewed and processed the application, the submitter will receive a generic email message directing you to check your TC3 system. TC3 will show a new status.

   a. Once the credit application (except for Line of Credit application) is **approved** by TCF, you will be able to create contract setups.

      i. When an application comes back approved, it automatically goes into the **Unassigned** worklist.   You will need to move it into **My Worklist** in order to create contract setups.

      ii. Line of Credit application **will not** go into the **Unassigned** worklist, but the Submitter will get still get the generic email to check status in TC3.

   b. Proceed to Contract and Document Generation to create documents for customer signatures and review how-to steps for submission to TCF Funding Group.

APPLICATION STATUS

   a. **Not Submitted** - Dealer has not submitted the application to TCF Credit Group.

   b. **Pending Decision** - The credit application is in the TCF Credit Group for review and processing.

   c. **Manually Approved** - The application has been approved and dealer can start contract setup.

   d. **Automatically Approved** - The customer has a line of credit approved, once the dealer draws on the line of credit, the individual application with the asset information is auto-approved. The dealer can start the contract setup.

e. **Returned to Submitter** - TCF has requested additional information in order to continue with the credit review. The dealer should refer to the Return Conditions tab for the additional information requested, provide and resubmit the credit application again for further review.

Address	Additional Contacts	Business	Insurance	Guarantor	Asset	Comments	Return Conditions

Please complete personal guarantor information in the guarantor section and attach the signed credit application.
☑

Please attach tax returns for the two most recent tax years for the applicant or for the personal guarantor.
☐

Please complete cross corporate guarantor information in the guarantor section.
☐

Please attach a complete set of audited financial statements for the most recent two fiscal years, and year to date interim financial statements (if applicable).
☐

Comments

f. **Declined** - TCF has declined the application. For the declined reason, please contact the TCF Credit Group.

CREATE A CONTRACT SETUP / DOCUMENTATION

CONTRACT SETUP GENERATION

17) Click on the Create a New Contract Setup link for the application that has been approved to start a contract setup.

18) A popup window will appear with the list of assets.

Search	Cancel	Save Changes

Application: 45190   **Customer Name:** LUMBER MART, INC.
Customer Credit Account: 36466

Search Results

	Asset Key	Setup Number	Type	Mfg	Class	Model	Asset Condition	Full Maintenance	Quantity	Total Cost	Amount Financed	Term	Residual Amount	Quantity to Split
☐	52855		016	084	04	0275	New	0	2	35,000.00	42,000.00	60	9,666.00	
☐	52856		016	084	03	0134	New	0	2	15,000.00	20,000.00	60	2,054.00	
☐	52866		016	084	04	0275	New	0	2	35,000.00	42,000.00	60	9,666.00	

◄ Displaying 1 - 3 of 3 ►

19) Select the asset you want by checking on the box next to the asset key number. To the right, input the quantity you want to split out by inputting a value under the Quantity to Split field. Leaving it blank will select the entire quantity. Click Save Changes once the box is checked and quantity is inputted.

| Search | Cancel | Save Changes |

Application: 45190   **Customer Name:** LUMBER MART, INC.
Customer Credit Account: 36466

Search Results

	Asset Key	Setup Number	Type	Mfg	Class	Model	Asset Condition	Full Maintenance	Quantity	Total Cost	Amount Financed	Term	Residual Amount	Quantity to Split
☑	52855		016	084	04	0275	New	0	2	35,000.00	42,000.00	60	9,666.00	1
☐	52856		016	084	03	0134	New	0	2	15,000.00	20,000.00	60	2,054.00	
☐	52866		016	084	04	0275	New	0	2	35,000.00	42,000.00	60	9,666.00	

◀ Displaying 1 - 3 of 3 ▶

NOTE: *You can only select one asset line for each setup. If you select multiple asset lines, the system will display "The Contract Setup will not be created. Please select one Asset Line." error message.*

20) Documentation Form will pop up on the next screen. Input all the red required fields.

Documentation Form - Equipment

Application: 45190
Setup Number: 42533
Organization Reference Number: 36466
Status: Pending Booking

Business Type
Corporation ▼

Other Entity Desc

Legal Name
LUMBER MART, INC.

DBA

Fed Tax ID
730725973

First Name | **Middle Name** | **Last Name** | **SSN #** | **Date of Birth** | **Approved Amount**

Customer Number
10359332

Credit Amount Requested
208,000.00

Delivery Date

NDA Required? ☐

Request Approval for One Page? ☐

Channel
Equipment ▼

Dealer Number
70268 🔍
Southeast Industrial Equipment

Sales Person

Approved Quantity
6

Total Quantity
1

MLA# | **MLA Date** | **Schedule #** | **Schedule Date**

NOTE: *For the MLA #, this is free form numeric value. It is recommended that the first application number that is approved for the customer is used as the MLA # and should be updated in the customer record as well as the MLA Date.*

21) Click on the Asset tab and click on the ID link to view the details of the asset.

| Address | Additional Contacts | Business Data | Guarantor | **Asset** | Comments | Approval Conditions | Documentation |

Asset(s)

Id	Type	Mfg	Class	Model	Asset Condition	Operating Conditions	Full Maintenance?	Quantity	Total Cost Per Asset	Amount Financed	Actual RV $	Te
52870	Forklift ▼	Toyota ▼	4 ▼	8FGC45U ▼	New ▼	Clean ▼	☐	1	35,000.00	42,000.00	9,666.00	

22) Within the Asset tab, click on the Sieral/VIN tab and input the serial number.

| Asset Pricing | Attachments | **Serial / VIN** | Asset Location | Variable Payments | Irregular Rents | Seasonal Rents |

Serial / VIN

	Id	Serial Number
	New	

| Add |

23) Click on the **Analyst** tab.
   a. Check for any **Comments, Approval Conditions**, and/or **Schedule Amendment Language**

24) Click on the **Asset** tab to review the final structure of the financing.
   a. Once the application is approved, you may still update certain fields/parameters, i.e. open/unlocked fields.
        i. **Change Monthly Terms** – You may change the term during contract setup. If the final term is lower than the original approval, this is acceptable. If the final term is longer than the original term, you will need to contact TCF Credit Group to review.
        ii. **Adjust Positions and add attachments** – You may add attachments as long as it is within the approved credit limit dollar amount or maximum quantity of units. If it is an increase, you will need to contact TCF Credit Group to review for the increase.
        iii. **Adding Maintenance** – You may add maintenance during the contract setup after the application is approved.
             1. If TCF is collecting and disbursing the maintenance to the dealer, you will need to check the Full Maintenance checkbox and input a value in the Maintenance Payment field.
             2. If the dealer is collecting the maintenance, you will need to check the Full Maintenance checkbox but *do not* include a value in the Maintenance Payment field.

Full Maintenance?	Base Payment	Maintenance Payment
☑	350.98	200.00

        iv. **Purchase Option** – You may add a purchase option during the contract setup after the application is approved. You must check the Purchase Option? field in order for the Purchase Option Amount field to appear for you to input a value. Purchase Option can only be the same or higher than the residual amount.

Purchase Option?	Purchase Option Amount
☑	

25) Click on the **Documentation** tab halfway down the screen to verify if you need to complete any items before proceeding to the required documents. Click on each sub-tab and input all applicable information for that lease or loan to be finalized.
   a. **Financing**
        i. For leases, input the overtime charges. For loans, you can leave it blank.

Overtime Usage Fee

        ii. Doc Fee is normally blank.
        iii. UCC Fee is generally $50 or $0, depending if your dealer utilizes TCF Funding Group to file UCC for the transaction.
        iv. Upfront Sales Tax have 4 options.
             1. Dealer Collected and Remitted – Sales tax is not part of the financing, dealer collected and remitted.
             2. Financed - Dealer to Remit – Tax is part of the financing amount. When this option is selected, TCF Funding Group will disburse the tax amount. It is the dealer's responsibility to remit this to the correct jurisdiction.
             3. Financed – TCF to Remit – Tax is part of the financing amount. When this option is selected, TCF Funding Group will deduct the sales tax and will remit to the correct jurisdiction. Generally, this option is selected if the dealer is selling out of state.
             4. TCF to Bill Customer – Tax is upfront, TCF will bill customer the full tax amount and this amount is included in their first invoice.

v.   # of Payments and Tax Collected on Payment (First month payment will auto-populate. Need to insert tax collected on that payment if applicable) – When this option is selected, the payment will be deducted from proceeds.

b.   **Contract Details**
   i.   For leases, input the security deposit amount, if applicable.
   ii.   For loans, complete all the disclosures. Additionally for loans, ensure to check all the boxes, if applicable.

Cash Price	Total				
	0.00				
Filing Fees	Total				
	0.00				
Taxes Paid	Total				
	0.00				
Other Charges (Payment and Purpose)	Total		To		For
	0.00				
Other Charges (Payment and Purpose)	Total		To		For
	0.00				
Total Other Charges and Amounts Paid to Others	Total				
	0.00				
Total Cash Price	Total				
	0.00				
Net Trade In Amount	Total				
	0.00				
Cash Down	Total				
	0.00				
Total Down Payment	Total				
0.00	0.00				
Amount Financed - Unpaid Balance	Total				
0.00	0.00				

U.C.C. financing statement(s), forwarded to filing office(s), and secured party's copy(ies) enclosed?
☐

Buyer/Co-Buyer insurance is confirmed, including loss payable clause showing TICF as loss payee for this Contract?
☐

Title or registration documents?
☐

c.   **Insurance** - Insurance information <u>is required</u> during the Documentation step
   i.   Loans require only Physical Damage Insurance
   ii.   Leases require BOTH General Liability and Physical Damage Insurance

d.   **Rider** - Based on the approved deal structure and options, a Rider will become a required document within the document packet. Some Riders include Purchase Option, Canadian/Mexico Rider, etc.

e.   **Optional Documents** – This is where you could generate the optional ACH form or insurance verification form.

NOTE: Be sure to **double check that all information is correct** before printing your documents.

CREATING VIEWING AND PRINTING DOCUMENTS

26) Once all your **Documentation** information and necessary fields have been completed, you may proceed to creating and printing documents.

27) Click on the **Documents** link in the navigation pane if you are still in the contract setup creation stage.
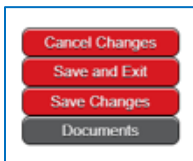
OR if you have exited the New Contract Setup, click on the **View Documents and Attachments for this Application** icon in the **My Worklist** window.
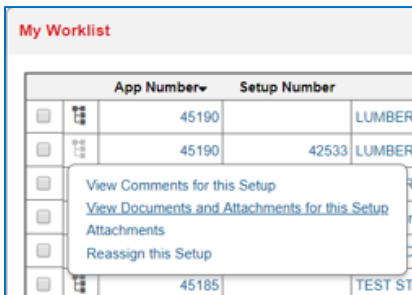
28) Select the documents you want to create by clicking to mark the checkbox located next to them.

29) Click on the Create Documents button

30) Once document is created that document will be in BOLD.

31) Print needed documents to pdf.

32) Obtain customer signatures on all appropriate documents.

33) After customer signs all the required documents, email or overnight the funding package to TCF Funding Group for review and processing. In TC3, make sure to click Submit Next Step which will move the setup to the Booking queue.
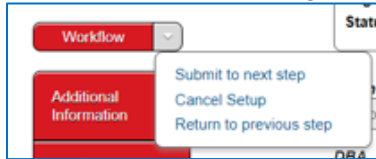
SETUP STATUS

a. **Pending Booking** - This is the status after dealer creates the contract setup or dealer submitted to the TCF Funding Group to review and process.
   i. **Documentation -** This status includes the contract setup created and still in the dealer worklist.
   ii. **Booking** – This status includes contract setup submitted to TCF Funding Group, also known previously as 'contracts in house'.
b. **Partially Booked** - This status indicates that a portion of the contract setups have been funded. There are still open contract setups still that are still open and waiting to be submitted to TCF Funding Group for review and processing.
c. **Booked** - All contract setups under the credit application have been funded.

ASSIGN/RE-ASSIGN APPLICATION/SETUP

34) All users within the same dealership have access to each other's worklist. In order for one user to go into another user's list, perform the following:
   a. Click the 'Admin' menu link and then select 'Manager Users' task link.

   b. On the next page, click the drop down list and look for the user's worklist you would like to get into and then click Refresh User Worklist.

   c. The next page will display a list of all the applications and setups in that user's worklist as well as all unassigned worklist. From there, you will be able to re-assign any applications and/or setups into your worklist and begin editing them.

   d. To assign and application to your worklist, click on the icon next to the application and then click on the 'Move this Application to Your Worklist' link.
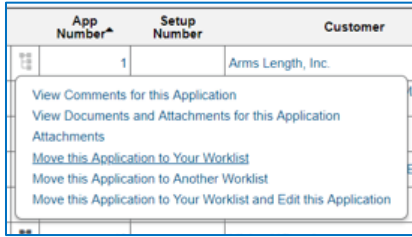
e. To assign an application to another user's worklist, click on 'Move this Application to Another Worklist' link as displayed on the previous bullet. Then a pop-up box will appear with a list of users within the same dealership, select the user you want to assign it to, and then click Assign.
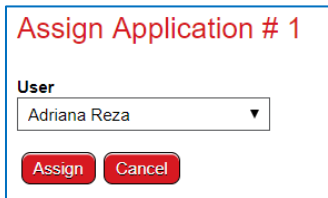
f. Once an application and/or setup is assigned to your worklist, you may view, edit or re-assign the application and/or setup.

APPLICATION SEARCH

35) Application Search allows a user to search any applications and/or setups in any queue or status.
   a. Click on the 'Application/Setup' menu link and then click on 'Application Search'.
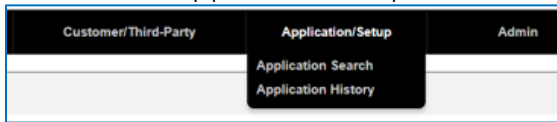
   b. The Search Parameters screen will display on the next page. You can search by any of the open fields and input a date range.

c. To search for all the in the applications that are in the Investigator/Analyst queues, under the Status Codes To Display, select 'Pending Decision' and then click Search. This will display a list of all the applications that are in Credit's queue, waiting for a credit decision. Other common status would be 'Returned to Submitter' and 'Automatically Approved'.

Status Codes To Display

| All |
| Not Submitted |
| **Pending Decision** |
| Automatically Approved |

Search

Search Results would like like the below.

Search Results

	App Number▲	Setup Number	Customer	Channel	Status
	45186		TEST STAGE PATCH INC	Equipment	Pending Decision

d. To search for all setups in the Funding queue, make sure View Setups is checked, Status Codes to Display is selected to All, on the Workflow Step, type in 'booking' and then click Search.

Search Parameters

View Setups ☑
Sum by Application Status ☐

Status Codes To Display: All, Not Submitted, Pending Decision, Automatically Approved

From

To

Date Range Criteria: All, Application Entry, Not Submitted, Pending Decision

Application Search

Application #
Setup #
Customer Number
Dealer Number

Customer Name
Address 1
City
State
Zip Code

Fed ID/SSN
Workflow Step: booking
Sales Region
SAP Contract #

Search Cancel

e. The system will not allow multiple workflow steps to be searched simultaneously. So in other to get a complete list of all the setups in the Funding queue (in addition to booking above), type in 'funding' under the Workflow Step field.

Search Parameters

View Setups ☑
Sum by Application Status ☐

Status Codes To Display: All, Not Submitted, Pending Decision, Automatically Approved

From

To

Date Range Criteria: All, Application Entry, Not Submitted, Pending Decision

Application Search

Application #
Setup #
Customer Number
Dealer Number

Customer Name
Address 1
City
State
Zip Code

Fed ID/SSN
Workflow Step: funding
Sales Region
SAP Contract #

Search Cancel

f.   To search for all setups funded, type 'booked' under the Workflow Step field.

NOTE: *The system currently does not allow the search results to be downloaded in any other applications.*

Appendix – Easy Button Desk Guide - TMHU CRM DATA button aka "Easy Button" in TC3

This desk guide provides simple instruction for using a new feature in TC3. The TMHU CRM DATA button will pull-in information from a TMHU CRM quote and auto-fill up to 39 fields in TC3 application entry. The benefit for your dealership users will be much faster application entry time, minimize duplicate entry, less opportunity for error and ease of use. Although the new button will provide efficiencies, using this new function is optional and not required to enter asset information and submit applications. Users can enter the information manually if desired and can also edit any field that was auto-filled.

Application Submission

Create an application in the same manner by selecting or creating the Customer and clicking on the New Application button.

Select the Asset tab then select the Add button to add the asset.

The TMHU CRM DATA button ("Easy Button") is located on of the Asset page in TC3.

User enters the fields below if they wish to use the Easy Button.

Select TMHU in the Asset Data Source field

Enter the Opportunity ID and Sort ID which are found in TMHU CRM

Next, click on the TMHU CRM DATA button (aka "Easy Button")

TMHU CRM screen shot below is where to find the information above for the Easy Button.

Opportunity ID number location in CRM

Sort ID number location in CRM

Once you click on the Easy Button aka TMHU CRM DATA button, all the fields in the screen shots below in RED boxes will be automatically transferred from TMHU CRM to TC3.

In all, up to 39 fields will be auto populated by the Easy Button making app entry much easier by reducing the hassle of having to go back and forth between CRM and TC3 copying and pasting data from one system to the other, thus saving time and improving accuracy. Once you use it you will think, NOW THAT WAS EASY!!!

User may edit any field auto filled by the Easy button if needed. Also note that the "Net Equipment Cost Per Asset" has been adjusted to not include transportation charges so no manual adjustment is needed in TC3.

To complete the Asset page, Users will need to complete the following in TC3:

- If there are Attachments, they will need to be entered manually
- The Program Type will be required to be manually entered.

Enter the attachment details in the attachment section of the Assets page.

Error Messages

Asset Data Source	Opportunity ID		Sort ID	
TMHU ▼	1234567890		002	**TMHU CRM DATA**

"Opportunity (########) does not exist"
- User entered the incorrect opportunity ID in TC3. No matching ID was found in CRM.

"Opportunity ID cannot be blank"
- Results if the user leaves the opportunity ID blank in TC3 when the user uses the Easy Button

"Sort number (###) not found in opportunity (########)"
- Displays if the user inputs an invalid Sort #. Sort # was not found in CRM for the Opportunity entered.

"CRM Model Number not Found in TC3"
- Displays if the model # from TMHU CRM is not found in TC3 when the user uses the Easy Button. The CRM data will not be transferred.

"Opportunity (########) does not belong to the dealer (#####)"
- If the Dealer Number on the application in TC3 does not match the dealer number associated with TMHU's opportunity ID in CRM, then the CRM data will not be transferred to TC3 and this message will display.

"Contract Type does not match. Please create another application"
- If more than 1 asset is being added to the application and the "Contract Type" is different than the first asset, then this message will display.
- Contract Type applies to all assets on the same application, meaning all assets on an individual application must have the same financing terms. For instance, a retail loan and lease cannot be combined on the same application.
- If the same CRM quote has multiple contract types, the user must submit separate applications for each Contract Type. See screen shot below.

"Financing Type does not match. Please create another application"
- If more than 1 asset is being added to the application and the "Financing Type" is different than the first asset, then this message will display.
- Finance Type applies to all assets on the same application, meaning all assets on an individual application must have the same financing terms. For instance, a closed end lease and flex term lease cannot be combined on the same application.
- If the same CRM quote has multiple contract types, the user must submit separate applications for each Contract Type. See screen shot below.

"Term does not match. Please create another application"
- If more than 1 asset is being added to the application and the "Term" is different than the first asset, then this message will display.
- Term applies to all assets on the same application, meaning all assets on an individual application must have the same financing terms. For instance, a closed end lease and flex term lease cannot be combined on the same application.
- If the same CRM quote has multiple contract types, the user must submit separate applications for each Contract Type. See screen shot below.

"Shipping Address must be in the US"
- Easy Button is not available for use if the shipping address is outside the U.S.

Additional Guidance:

Adding additional assets to the same application

- Please be aware that Contract Type, Finance Type and Term must be same for all assets, otherwise a separate application must be created for different terms.
- Select Add under the Asset Tab and follow same process as in the first Asset.

Replacing an asset or replacing a sort

- First, delete input from the Contract Type and the Term field

- Next, enter CRM Quote ID and Sort ID and click TMHU CRM DATA button