

DEALER CHECKLIST

Shop by Payment powered by Instant Financing

Now that you've enabled Shop By Payment powered by Instant Financing, leads from pre-qualified customers will be coming straight to your CRM.

To ensure you and your staff are ready to make the most of these high-value sales opportunities, there are a few questions you should ask yourself as final check:

CRM LEAD VERIFICATION

Can you see the following lead tags in your CRM?

- Dealer Inspire Website Finance Intent
- Dealer Inspire Website PreQualified
- Dealer Inspire Website Credit Application

LEAD NOTIFICATION EMAILS

Are the right people receiving lead notifications?

Pro tip! Log into your CRM Admin portal to set up special rules for finance lead distribution for your intended parties, like F&I and Desk Teams.

ROUTEONE, DEALERTRACK APPLICATION VERIFICATION

Are my leads appearing in my Finance Team's Credit Application system?

- Yes! I see:
 - Lead Source: CreditIQ
 - Credit Applications in the Deals Tab
 - Credit Applications in Leads Tab - DealerTrack only
- No? Email support@creditiq.com

AUTOMATIC ACCESS

- User(s) are set up in Automatic
- User(s) can log into Automatic from a CRM link
- Additional Automatic Users. Please email these users to support@creditiq.com:



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VERIFY FEES

Refer to the onboarding email for these settings

- Verify Doc Fee/Admin Fee
- Verify Max Lender Fee Threshold (default is set at \$200, Dealer may adjust this)
- Verify Markup on Points (default is set at 2%, Dealer may adjust this)
- Any additional Dealer Fees or Adjustments to existing settings:
 - _____
 - _____

VERIFY LENDERS

- In-Network Lenders:
 - Capital One - Soft Credit Only
 - TRUIST - Hard Credit Only
 - Chase Financial - Hard Credit Only
 - PNC - Hard Credit Only
 - US Bank - Hard Credit Only
 - Bank of America - Hard Credit Only
 - Global Lending Services - Soft and Hard Credit
 - Westlake Financial Services - Soft and Hard Credit
 - American Credit Acceptance - Hard Credit Only
- Any additional lenders the dealer would like to add:

Your Captive lenders will be Automatically set up for Soft and Hard Credit capabilities.

- _____
- _____

- Adjustments to Lender Rate Card:

- Rate: _____
- Credit Tier: _____

In the case that you need to make any adjustments when verifying fees or lenders, please email those adjustments to: support@creditiq.com

