# CUDL DMS Integration Solution - Finance Express

by CU Direct Corporation

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# 1 Introduction

This guide walks the Finance Express user through the process of transmitting a deal from the FEXDMS system to the CUDL Dealer Portal



# 2 Transmitting a Deal to CUDL

Transmitting a deal to CUDL begins after the Finance Express user has entered all relevant deal and customer information into the FEXDMS system

#### Step 1

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From the **Worksheets** tab the user selects the **FEX Lender Finance Worksheet** button for the customer and vehicle they wish to transmit to CUDL

And a second second	DEALS ¥	INVENTORY ¥	NOTES REC ¥ QU	EUES 🖇 R	REPORTS ¥	SETTINGS 8	QUICKBOOKS >	HELP ¥	DEALER SUPPORT 🗧	LOG
LXNPGK, TO	INYA (Back to	o Deal List) ide In 1 Trade	e In 2 Worksheet	s		Crea	tion Method: Deal M	anager   Dea	Select Deal Action al ID #: 2634202   Status: 1	 Workin
	<	Prev		_			Next >	•		_
Vorksheet							V	iew Lender	s For TONYA BKKLXNF	GK
STEP 1 - VEH	ICLE									
Selected Vehic	cle			I.						
Stock #	Year	Make	Model	Color	Mileage	Remov	e Vehicle			
F1013	2005	Toru	Crown victoria		51000					
STEP2 - CRE	ATE WORKSH	teet Worksheet	Click here to cro for <b>TONYA BK</b> Select a Lender worksheet for <b>T</b> <b>Victoria</b>	eate a Finar KLXNPGK of from the dr ONYA BKK	nce worksheet on the 2003 F rop down mer KLXNPGK on nder] <u>-</u>	t to submit to Ford Crown hu below to c the 2003 Fo	FEX Lenders Victoria reate a Finance ord Crown			
Loc	In-House Finance Worksheet       Click here to create an In-House (BHPH) worksheet for TONYA BKKLXNPGK on the 2003 Ford Crown Victoria									

### Step 2

The user is then be presented with the worksheet for the customer selected

- At this time the user should verify that the data they are transmitting is correct
- Then select the Find Lenders button

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😑 FEX	DMS	Product							
	DEALS × INVI	ENTORY ×	NOTES P		REPORTS	× SETTINGS ×		* DEALER SUPPORT * LOG	
SKKLXNPGK, TON	IYA (Back to Deal I	.ist)				Crea	ion Method: Deal Manager   [	Select Deal Action   Deal ID #: 2634202   Status: Working	
App Info Credit/Complian	ice Info Trade In	1 Trade	In 2 V	/orksheets					
< Return to Workshe	et List Cor	ntract	Previo	us Printed Forms	Print	Forms Fin	d Londers WOR	KSHEET IS UNLOCKED	
					[Work:	sheet Settings]	QuickNav	[Hide]	
2003 Ford Crown Victor	ia / P1013					[Show]	- Worksheet Settings - Inventory Edit - Taxes / Fees		
RegZ Disclosure Results	5						- Trade In Allowance - Def Down Info		
APR	Finance Charge	Amo Finan	runt Total Total nced of Payments Down Payment			Total wn Payment	- Product Info - Deal Expenses / Commissions / Reserves		
18.0002%	\$7,052.63	\$13,46	9.17	\$20,521.80		\$0.00	See Expenses / Co		
Calculation Details	Roll Back Option	Calc Payn	nent		•	Calculate	Analysis	[Show]	
Contract Date	: 08/27/2013		Analysi	s (Summary)					
Sales Price	\$12,000.00		Sales Price:		\$12,000.00				
Cash Down	n \$0.00			Fees:	\$531.5	0 (+)			
Net Trade-In	\$0.00	1		Taxes:	\$937.67 (+)				
After Market Products	\$0.00	1	After Market:		\$0.00 (+)				
Loan Rate	: 18.0000%			Total Sale:	\$13,469.1	7			
				Total Down:	\$0.0	0 (-)			
			u	npaid Balance:	\$13,469.1	7			
Payment Schedule									
Schedule # of Payments	Desired Payment	Frequ	ency	First Payment D	ate Calcula	ated Payment			
1 60	\$0.00	Monthly	-	09/27/2013		\$342.03			
		Final Pa	yment	08/27/201	8	\$342.03			

## Step 3

- The user is then presented with their **Lender Listing** page where they should see CUDL-CA as an option with the **Send to Lender** button active to the right of the listing
- The user selects the **Send to Lender** button for CUDL-CA

KLXNPGK, TONYA	(Back to Deal List)	Creation Method:	Select Deal Manager   Deal ID #: 26
			×
Lender Listing Lender Name L	ender Tier Name	Criteria	Action
BankofStockton-CA	Tier 1	You are not authorized with this lender - unassigned Dealer ID. For assistance, please contact Customer Service with your account information at: 866-339-2878.	
Chase-CA	RouteOneDSP	Reject if primary monthly income less than \$1 The applicant has \$0.00	
CPS-CA	Default	Reject if monthly income less than \$1300 This customer has \$0.00	S
CUDL-CA	default	Meets scorecard criteria Send To L	oder
Mongoose-CA	buyout	Finance amount \$46866.29 exceeds lenders max \$30000	
Nationwide-CA	Default	Reject if combined time at current and previous residences is less than 36 months This customer has 0 months of residence history.	
WellsFargoDealerServices-C	A STD	You are not authorized with this lender - unassigned Dealer ID. For assistance, please contact Customer Service with your account information at: 866-339-2878.	
WFI-CA	Pref Prog	Reject if monthly income less than \$1500 This customer has \$0.00	
	Rehab Prog	Reject if monthly income less than \$1000 This customer has \$0.00	
	Std Prog	Reject if monthly income less than \$1500 This customer has \$0.00	
zz_qa_weblender-CA	Pref Prog	Reject if monthly income less than \$1500 Send To Le	nder
	Rehab Prog	Meets scorecard criteria	
	Std Prog	Reject if monthly income less than \$1500 This customer has \$0.00	

### Step 4

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- Once the deal has been transmitted successfully to CUDL the user will see a Sent response and the screen below
- They should now proceed to the CUDL Dealer Portal to transmit the application to the lender

EX ADMIN 🗧 MY CONSOLE DE	ALS * INVENTORY * NOTES REC * QUEUES * REPOR	TS × SETTINGS × QUIC	KBOOKS & HELP *	DEALER SUPPORT 8 LOG O	
KKLXNPGK, TONYA	(Back to Deal List)	Creation Met	hod: Deal Manager   D	Select Deal Action eal ID #: 2634202   Status: Working	
pp Info Credit/Compliance Info	Trade In 1 Trade In 2 Worksheets				
	< Prev		Next >		
ehicle / Lender Selection Area					
	lenders		Citetres Banding D		
ODL-CA -	Current Deal	00 000 53	Status: Pending L	ecision	
2003 Ford Crown Victoria	Date: 8/15/2013 11:05 AM	\$3,035.00	Deal Actions		
21 AT F74W35A115514	Sales Price: \$12,000.00		Worksheet:	View	
	Amt Financed: \$10,469.17				
	Total Down: \$3,000.00			Copy Worksheet	
	Loan Rate: 18.000%	3	Lender Requests		
	RegZ APR: 18.0003%		Call Back Notes		
	Num Pay/Freq:		Call Dack Notes.		
	Pmt Amount: \$265.85				
	Buy Rate:		F		
	Ann Frank		Forms	Print Forms	
	Acq Fee: Discount		Porms:	Print Forms	
	Acq Fee: Discount: Discount %:		Forms:	Print Forms	
	Acq Fee: Discount: Discount %: Max Mileage:		Forms:	Print Forms	
	Acq Fee: Discount: Discount %: Max Mileage: Min Year Model:		Forms:	Print Forms	

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## 3 Accessing the Deal in Dealer Portal

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# If the user is not already logged into the CUDL Dealer Portal they should do so at this time by selecting the Log In link at the top right corner of the screen



#### Step 1

- The user should see the deal they transmitted in the **DMS Integration** module on the right side of the workspace
- The user then clicks on the Customer Name to launch the CUDL application page

DMS Integration		E
JANICE DOOLEY 1	234231423423142343	
	24	h
5	i/29/2012 10:51:14 AM	
DAVID	4412342314	
WACIKOWSKI 5	/29/2012 10:50:48 AM	E
NANCY BARTEK a	aaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaaa	
aaaabbbbbbbbbbbbbb	obbbbbbbbbbbbbbccc	
5	/29/2012 10:38:51 AM	
ALLEN FFRINGE 2	111111111111111111111	
111111111111111	111111111111122222	
5	/29/2012 10:29:22 AM	-
Deal # *		
		1
		2
Import	Deal Queue	

### Step 2

- This action brings up the **New Application** window with the transmitted deal data pre-loaded into the application fields
- The user then selects the **Lender** from the dropdown and completes any missing fields (*yellow* highlighted fields with no data)
- The user should always double check the data in the application to make sure that all required fields are completed with the correct data
- **This is especially true for the deal structure information**
- The user then clicks the Save & Submit button to send the application to the selected lender

Required for Save       Required for Save/Submit       Save Sud Sult	Mike Fe	ne ederoff							Test D	ealer for Dealer
Application Setup <pre></pre>	Require	ed for Sav	re 🗌	Required f	or Save/Subm	it			<u>Save</u>	Save and Su <u>b</u> mit
	<ul> <li>Applicat</li> <li>Loan Type</li> <li>Include C</li> <li>Include T</li> </ul>	tion Setu Auto Co-Applic Frade-In	p Lende ant	r	Pre-Approv	red	•			(7) Help
New/Used       Year       Make       Model       Mileage       VIN #         New       2011       HONDA       accord       5	😵 Deal Str	ructure								() Help
New       2011       HONDA       accord       5         Vehicle Value       \$24,325.00       Value Type       MSRP          sales Price       \$22,565.00       if deal structure is not temized below, enter base cash price.       if deal structure is itemized below, enter base cash price.         sales Price       \$22,565.00       if deal structure is itemized below, enter base cash price.       if deal structure is itemized below, enter base cash price.         sales Down       \$22,505.00       Trade Alowance       Rebate       Image: Cash Down         Cash Down       \$2,500.00       Trade Alowance       Rebate       Image: Cash Down         Doc Fees       Credit Life       Tax       Image: Cash Down       \$22,565.00         GAP       Theft Deterrent       Environmental Package       Image: Service Contract       S22,565.00         GAP       Theft Deterrent       Image: Service Contract       S22,565.00       Image: Service Contract       S22,565.00         Iclense       Additional Items       Total Sales Price       \$22,565.00       Image: Service Contract       S22,565.00         Iclense       Additional Items       Cotal Security       S22,565.00       Image: Security       Image: Security       S22,565.00         Iclense       Additional Items       Cotal Security <th>Ne</th> <th>w/Used</th> <th>Year</th> <th>Make</th> <th></th> <th></th> <th>Model</th> <th>Mileage</th> <th>VIN #</th> <th></th>	Ne	w/Used	Year	Make			Model	Mileage	VIN #	
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Iame     duck     donald       (Last Name)     (First Name)     (Middle Name)       Date of Birth     Age     Social Security #       Driver's License #     Issuing State     Expiration Date	Member Typ	pe		-	•	Citizensh Status	ip		•	
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