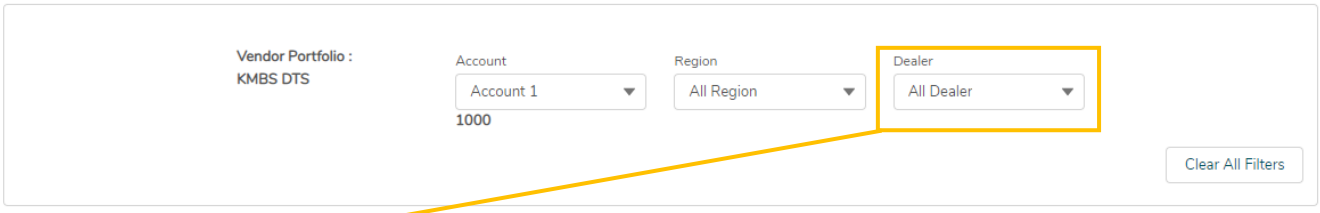
CIT Vendor Portal

Application Guide

How to submit a credit application:

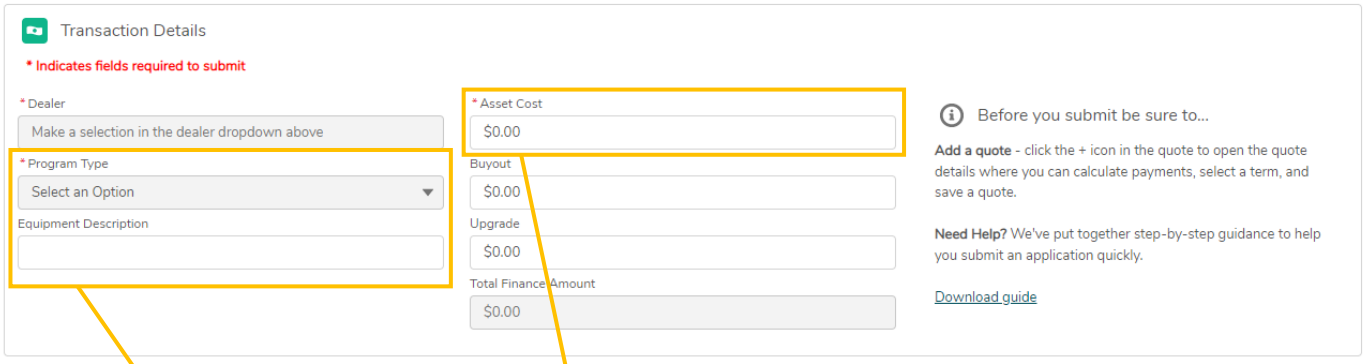
Please follow these instructions as closely as you can. Following the guide makes it less likely to get an error when submitting an application.

1. Select the dealer.



Select a **dealer** from the ***portfolio panel*** found at the top of the page. Once you've selected a dealer, it will populate in the ***transaction details*** section and will drive program and quote options.

2. Fill in the transaction details.



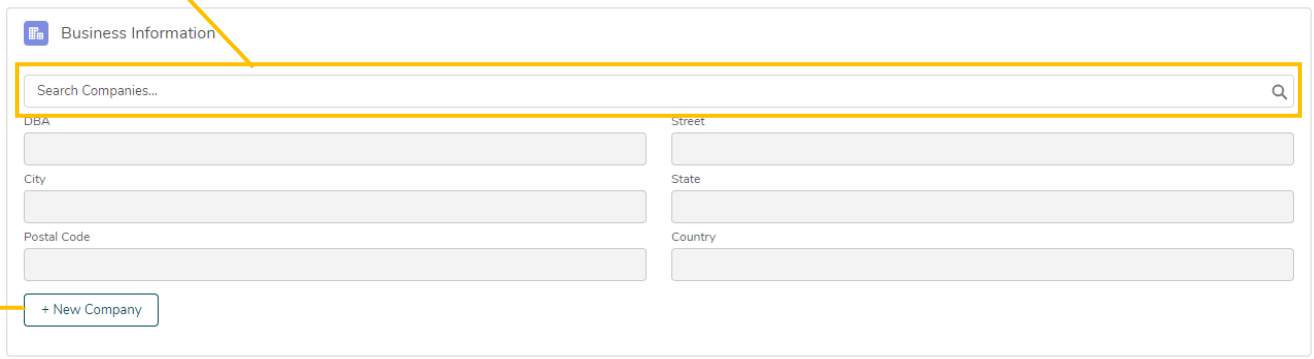
Select the **program type** from the dropdown, and provide the **equipment description.**

Fill in the **asset cost**.

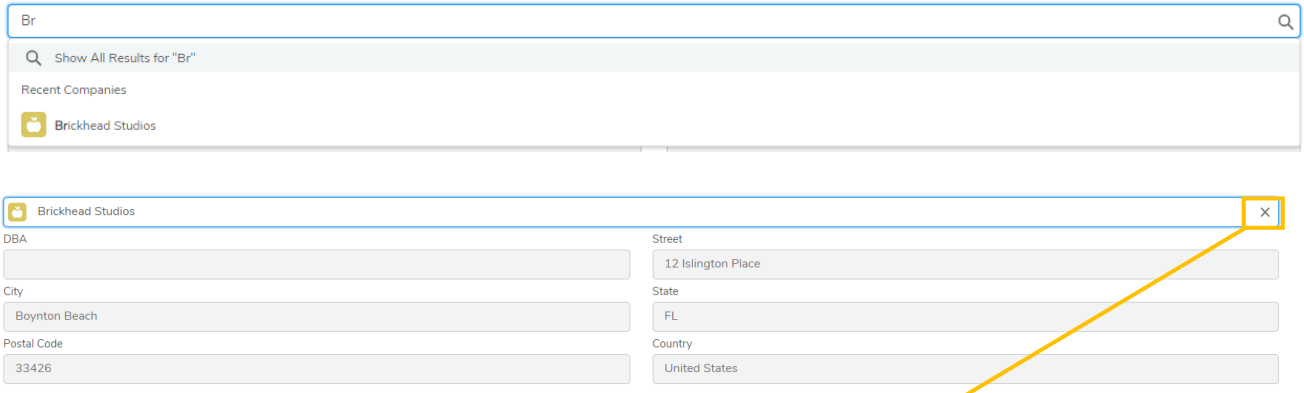
If applicable, fill in the **buyout** and **upgrade** amounts. ***Total financed amount*** is automatically calculated based on the amounts entered.

3. Provide customer's business information.

You can **search** for customer.



As you type, suggested matches will show in a dropdown. You can select the company from there. This will populate the business information with the data recorded for that company.



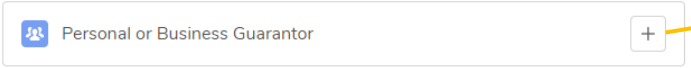
Verify the address matches your customer before proceeding.
If it does not, click the **X** in the **company search** field to remove and enter a new customer.

When you select an existing company, you cannot edit the business information.

You can click **+ New Company** to add a new customer. This will open a modal where you can provide the business information.
* Indicates fields that are required: **Company Name**, **DBA**, **Phone** and **Address**.

If you create a new credit application from a ***prequalification*** result, ***customer*** or ***contract*** detail screen, the ***Business Information*** section will automatically populate for that customer.

4. If applicable, add personal guarantor (optional).



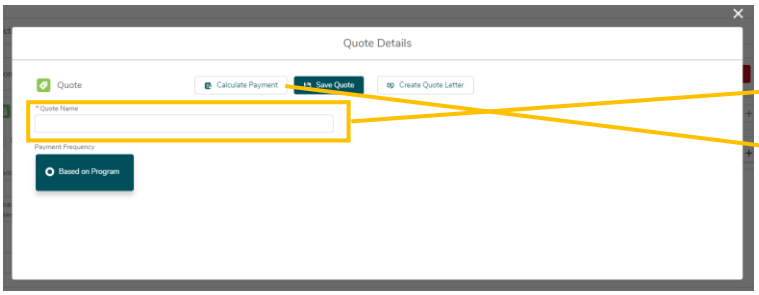
Click the **+** in the ***Personal Guarantor*** section to open the personal guarantor modal where you can add the details for the person.

All fields in personal guarantor modal are required.

5. Create a quote to select the desired term and payment.



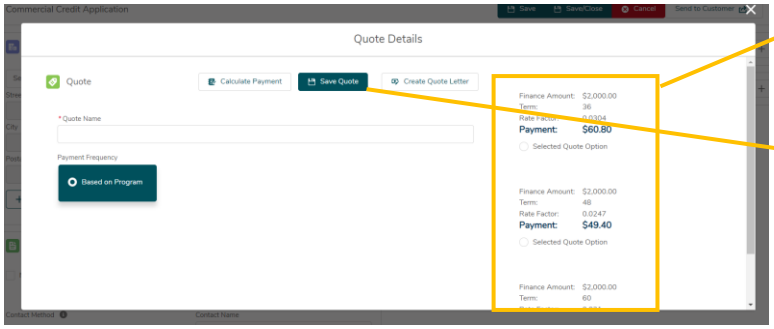
Click the **+** in the ***Quote*** section to open the quote modal.



In the quote details modal,

enter the **quote name.**

Click **calculate payment** to generate the quote options.



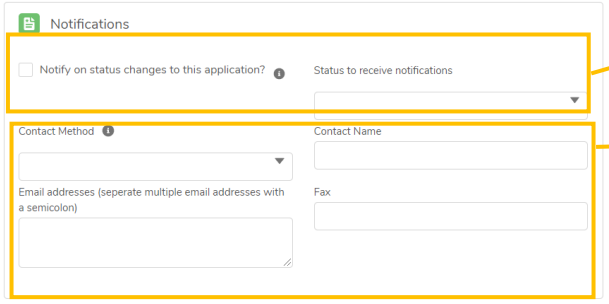
The **Terms and Payment options** will show on the right side of the modal. Select the **radio button** for the desired term and payment option.

Click **Save Quote.**

Not seeing quote options? Make sure you've selected a dealer and program in the transaction details first.

Clicking the **Send Quote Letter** option will bring you through the process of generating a quote letter that will then save this as a ***quote***. This will remove you from the application process, and you'll have to click apply from the ***quote***.

6. Set up additional notifications.



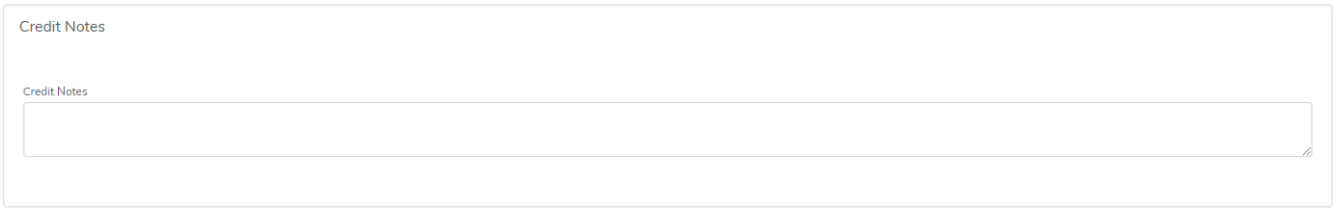
To configure additional alerts specific for this application, check **Notify** and select which **status** the person should receive.

In **contact method**, select how the person should be notified (email or fax), enter the **contact name** and then provide the contact information in the cooresponding field (e.g. if email is selected, email addresses into the cooresponding field).

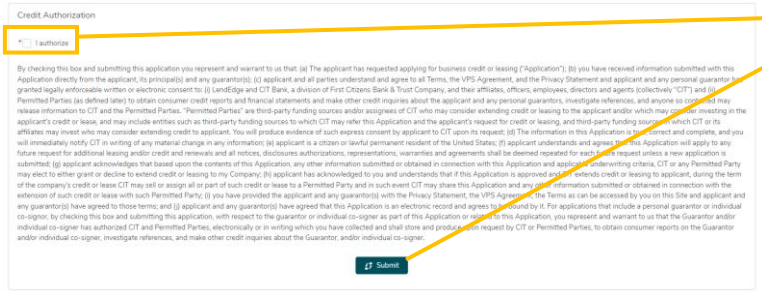
These alerts are in addition the the alerts you have set up on your account, found by clicking your name in the header and selecting **account app alerts**.

7. Provide credit notes (optional).

Have additional details you'd like to provide to credit about the customer's application? Enter those into the **credit notes** field.



8. Authorize credit, and submit.

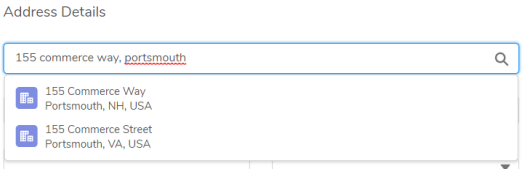


After reading the authorization, check **I Authorize** and then **Submit** the application.

Not ready to submit? You can **save** your application at any point after entering the business information and resume it at another time by going to ***My Deals*** on your home screen and selecting the status ***New*** from the dropdown.

Troubleshooting and tips

When entering an address, suggested matches will show in a dropdown. Selecting an address will automatically fill the address fields with the data from the selected address.



If you encounter an upsert failed error message when submitting, it could be that you've missed entering some required fields or selected the wrong dealer. The message at the *end* of the error message will tell you what information is missing.

