

*Creating Finance Central applications  
through Motorcentral  
A step-by-step guide*

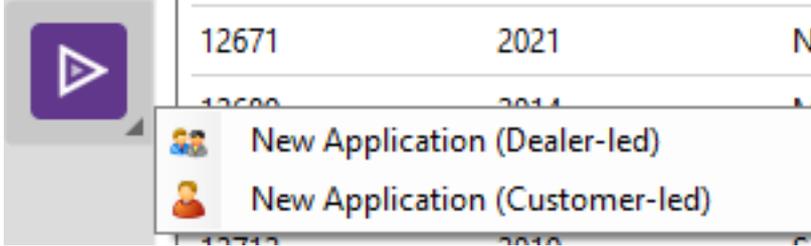


*Creating a Finance Central application  
through the Motorcentral quick link*

# Creating an application via the Motorcentral quick link

From the main Motorcentral screen, navigate to the Finance Central logo. Click on the grey arrow on the right-hand side of the box.

You can then choose your application preference of Dealer-led or Customer-led.



Enter customer information to allow an application to be created.

A screenshot of a web form titled 'New Application (Dealer-led)'. The form is divided into two sections: 'Admin Details' and 'Customer Details'. Under 'Admin Details', there are dropdown menus for 'Dealership' (set to 'Auckland') and 'Salesperson' (set to 'Jaz Rogers'). Under 'Customer Details', there are input fields for 'First Name', 'Last Name', 'Mobile Phone', and 'Email Address'. At the bottom right, there are 'OK' and 'Cancel' buttons.

When the information is entered, select the OK button. You'll be redirected to the application form.

A screenshot of a web form titled 'Tell us about your loan'. The form is titled 'Vehicle Information' and contains several questions and input fields. The first question is 'Does the customer have a vehicle in mind to purchase?' with 'Yes' and 'No' radio buttons. The second question is 'What type of vehicle is your customer interested in?' with a dropdown menu. The third question is 'Vehicle plate number' with an input field (example: 'e.g. ABC123'). The fourth question is 'Stock ID' with an input field (example: 'e.g. ABC123'). The fifth question is 'What is the vehicle price?' with an input field (example: '\$').

If Customer-led is selected, the box below will be displayed to allow the link to be sent to the customer for completion.

A screenshot of a web dialog box titled 'Finance Application - Customer Link'. The dialog box contains a text area with a URL: 'https://preview.financecentral.co.nz/app/b1enjrbmenq3'. Below the text area are three buttons: 'Print', 'Copy to Clipboard', and 'Close'. The background shows a blurred view of the 'New Application' form.

*Creating a Finance Central application by  
converting an opportunity into an  
application*

# Converting an opportunity into an application

Create the sale as per the normal process in Motorcentral. Ensure all insurances, extras and referral fees are included.

Converting an existing opportunity:

Navigate to the Opportunity funnel and search for the customer.

Opportunities							
jade							
New Activity ▾ Convert to Sale							
Open Date	Referral Method	Primary Customer	Owner	Est Value	Last Activity	Medium	Last Act Vehicle
10/02/2023	Need A Car	Jade Flinestone	Jaz Rogers	43590.00	Finance Application - ...	Web	1064 - Nissan Navara

Double click on the opportunity to open it.

Click on the last activity in the bottom right-hand side of the screen. Once the line is highlighted blue, select Convert to.

Opportunity - 5947

File Documents

General Custom

Basic Details

Opportunity No: 5947

Open Date: 10/02/2023

Description:

Dealership: Auckland

Owner: Jaz Rogers

First Contact

Medium: Web

Referral Method: Need A Car

Opportunity Management

Next Action:

Next Action Date: 10/02/2023

Primary Customer

Name: Jade Flinestone

Home Phone:

Work Phone:

Mobile Phone: 0275342374

Email: jaz@motorcentral.co.nz

Status Details

Status: Open

Est Value: \$43,590

Probability: 3 Stars

Status: Open

Assignee: New

Comments:

Estimated Value: 43590

Probability: 3 Stars

Quick Response

Subject:

Body:

Internal Note Customer Email

Add Note

Activities

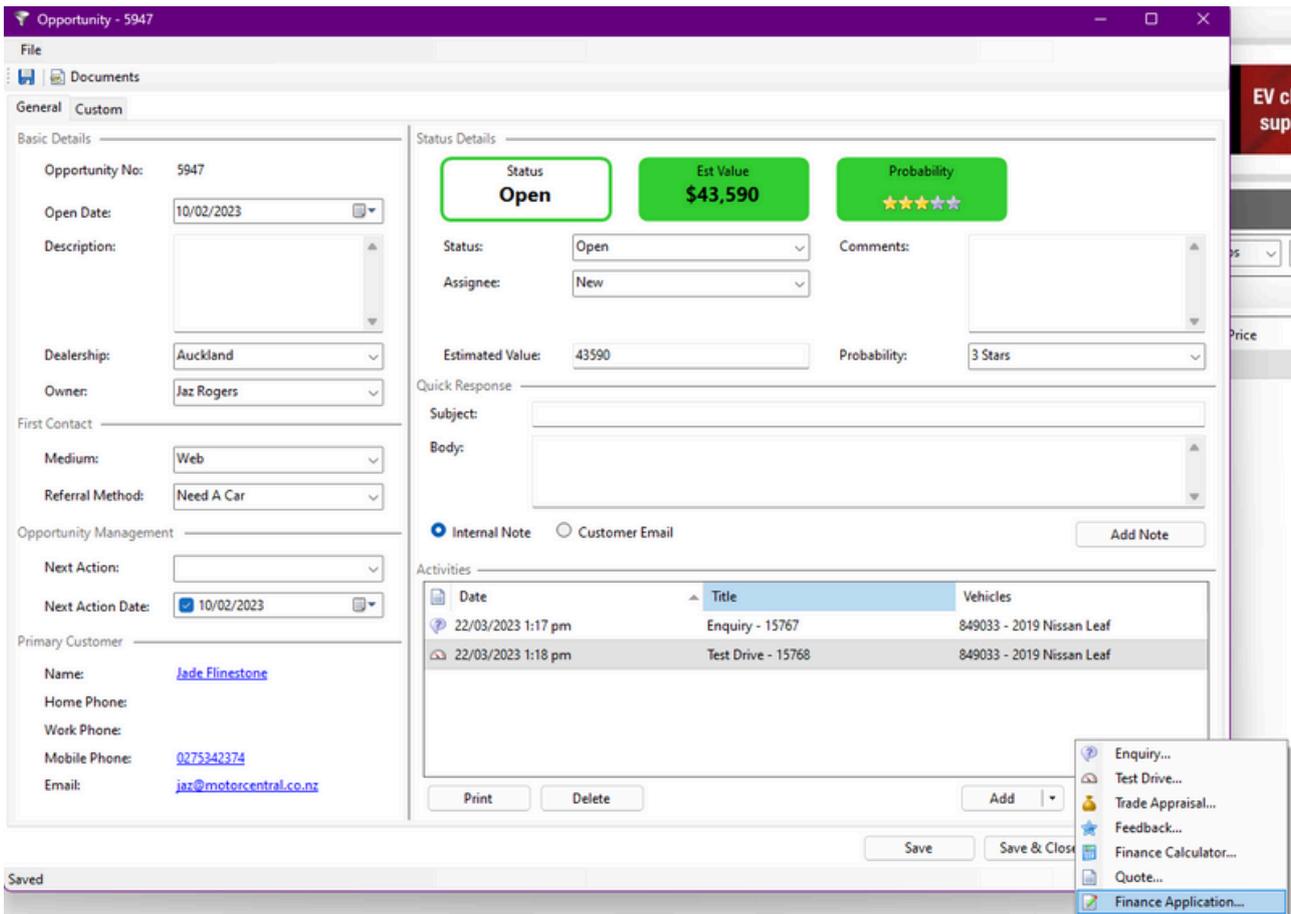
Date	Title	Vehicles
22/03/2023 1:17 pm	Enquiry - 15767	849033 - 2019 Nissan Leaf
22/03/2023 1:18 pm	Test Drive - 15768	849033 - 2019 Nissan Leaf

Print Delete Add Convert To

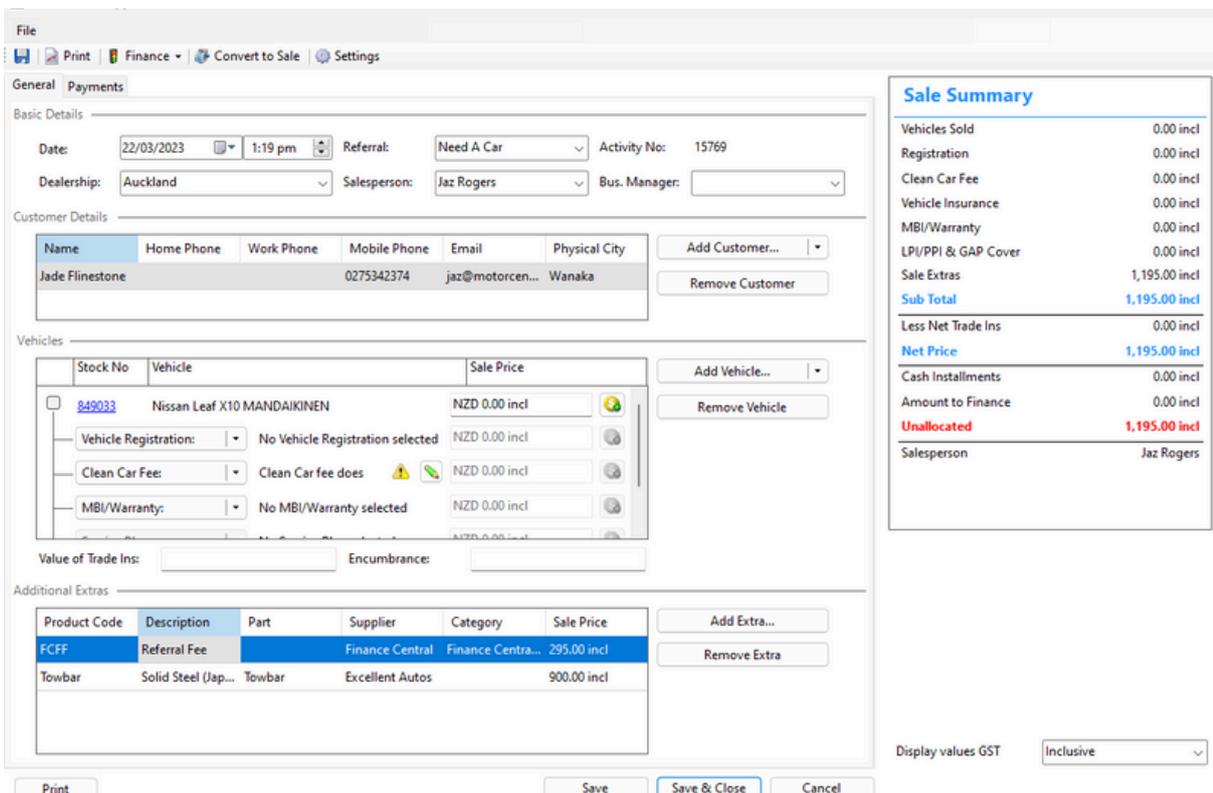
Save Save & Close Cancel

# Converting an opportunity into an application

Select the Finance Application option from the drop down.



The below screen will be displayed. Enter any extra products such as MBI, tow bars, tints, referral fee, etc. A trade amount can also be added here if applicable.



# Converting an opportunity into an application

Once all the information is entered, navigate to the Finance tab in the top left corner. Gap, PPI and finance information can be added here.

The screenshot shows the 'New Finance Application' window with the following sections:

- General Payments:**
  - GAP Cover: No GAP Cover selected. GAP Cover Sale Price: NZD 0.00 incl.
  - LPI/PPI: No LPI/PPI selected. LPI/PPI Sale Price: NZD 0.00 incl.
  - Cash Installments: Deposit On Signing: [ ] Due On Delivery: [ ]
- Finance Information:**
  - Financier: Finance Central
  - Term: [ ] Month at [ ] %
  - Amount to Finance: 16195.00
  - Establishment Fees: NZD 80.00 incl
  - Referral Fees: NZD 295.00 incl
  - Remove Finance button
- Notes:** [ ]
- Sale Summary:**

Vehicles Sold	15,000.00 incl
Registration	0.00 incl
Clean Car Fee	0.00 incl
Vehicle Insurance	0.00 incl
MBI/Warranty	0.00 incl
LPI/PPI & GAP Cover	0.00 incl
Sale Extras	1,195.00 incl
<b>Sub Total</b>	<b>16,195.00 incl</b>
Less Net Trade Ins	0.00 incl
<b>Net Price</b>	<b>16,195.00 incl</b>
Cash Installments	0.00 incl
Amount to Finance	16,195.00 incl
Unallocated	0.00 incl
Salesperson	Jaz Rogers
- Finance Summary:**

Finance Central	16,570.00
0 Months at .00%	
Interest	-16,570.00
Cost of Finance	-16,570.00
Monthly: .00	Weekly: .00
Fortnightly: .00	Week (48): .00

Buttons: Print, Save, Save & Close, Cancel. Status: Saved.

If the customer has a deposit, enter it in the deposit on signing field.

Cash Installments

Deposit On Signing: [ ] Due On Delivery: [ ]

This screen is also where the finance company, establishment fee and amount to finance can be added.

Finance Information

Financier: Finance Central

Term: [ ] Month at [ ] %

Amount to Finance: 16195.00

Establishment Fees: NZD 80.00 incl

Referral Fees: NZD 295.00 incl

Remove Finance button

Once the finance information is entered, navigate up to the Finance button on the menu bar.

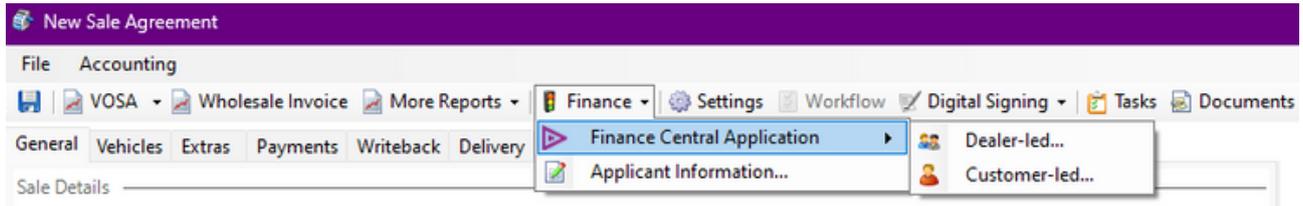
Finance Application - 15769

File

Print Finance Convert to Sale Settings

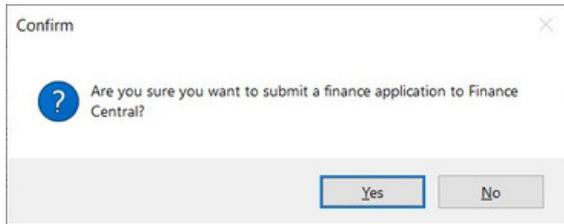
# Converting an opportunity into an application

This will provide two options- Select "Submit to Finance Central".



Motorcentral will now create a unique finance application for the customer.

A prompt will confirm that the application will be submitted to Finance Central.



The Finance Summary on the left side of the Sale Payment screen will change from the standard screen in Example 1.

It will now display the Finance Central information as per Example 2 below:

Example 1

Sale Summary	
Vehicles Sold	8,295.00 incl
Registration	0.00 incl
Clean Car Fee	0.00 incl
Vehicle Insurance	0.00 incl
MBI/Warranty	0.00 incl
LPI/PPI & GAP Cover	0.00 incl
Sale Extras	0.00 incl
<b>Sub Total</b>	<b>8,295.00 incl</b>
Less Net Trade Ins	0.00 incl
<b>Net Price</b>	<b>8,295.00 incl</b>
Cash Installments	0.00 incl
Amount to Finance	8,295.00 incl
<b>Unallocated</b>	<b>0.00 incl</b>
Payments to Date	0.00 incl
<b>Money Outstanding</b>	<b>8,295.00 incl</b>
Salesperson	Jaz Rogers

Finance Summary	
Finance Central	8,670.00
0 Months at .00%	
Interest	-8,670.00
Cost of Finance	-8,670.00
Monthly: .00	Weekly: .00
Fortnightly: .00	Week (48): .00

Display values GST

Example 2

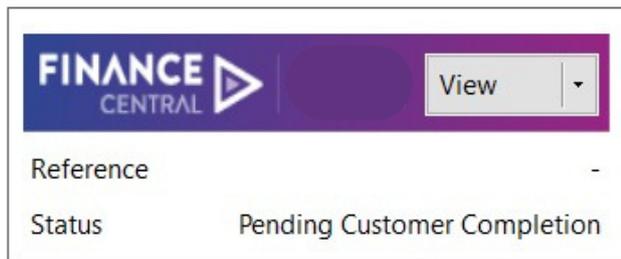
Sale Summary	
Vehicles Sold	8,295.00 incl
Registration	0.00 incl
Clean Car Fee	0.00 incl
Vehicle Insurance	0.00 incl
MBI/Warranty	0.00 incl
LPI/PPI & GAP Cover	0.00 incl
Sale Extras	0.00 incl
<b>Sub Total</b>	<b>8,295.00 incl</b>
Less Net Trade Ins	0.00 incl
<b>Net Price</b>	<b>8,295.00 incl</b>
Cash Installments	0.00 incl
Amount to Finance	8,295.00 incl
<b>Unallocated</b>	<b>0.00 incl</b>
Payments to Date	0.00 incl
<b>Money Outstanding</b>	<b>8,295.00 incl</b>
Salesperson	Jaz Rogers

**FINANCE CENTRAL** View

Reference -

Status Pending Dealer Completion

# Converting an opportunity into an application

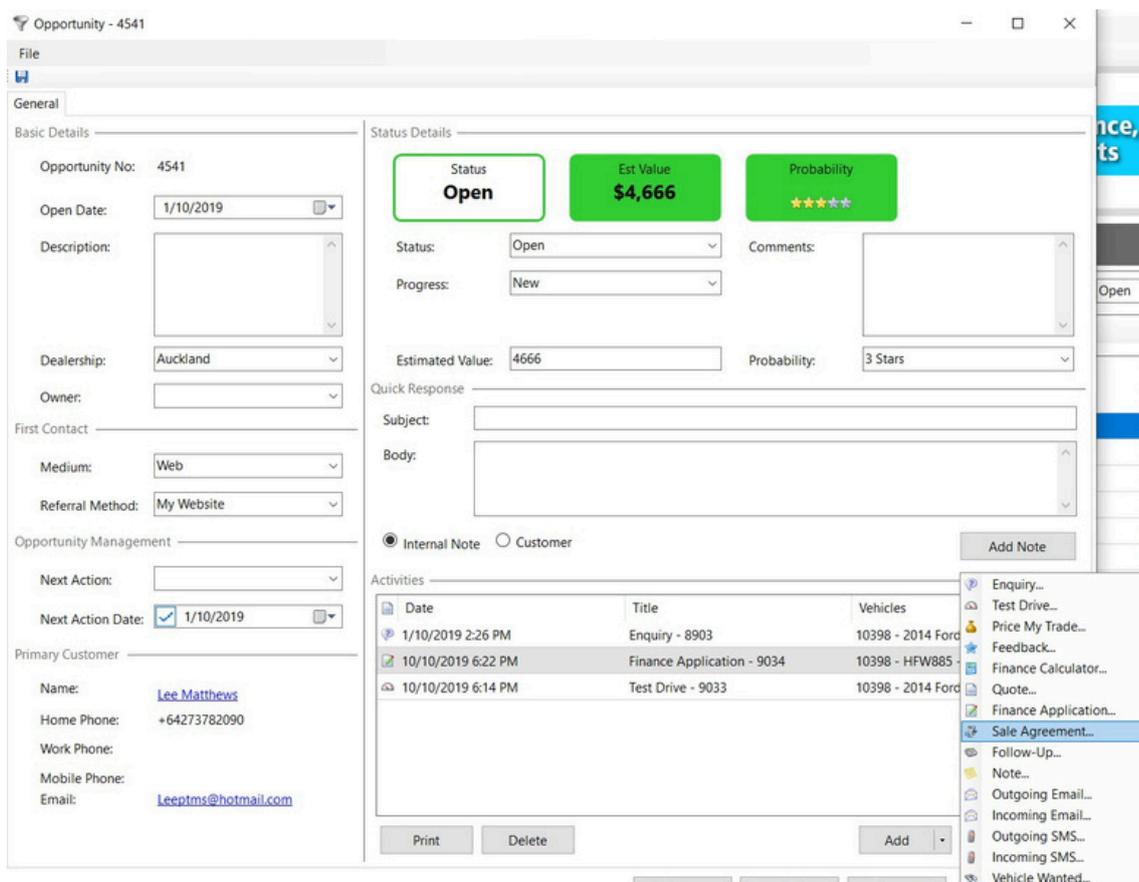


The Finance Central icon will allow the following functions:

View – clicking on “View” will launch a window providing you with the ability to copy and paste the link and forward it to the customer.

Arrow – clicking on the arrow beside the view button will allow you to refresh the status of the application.

Once the application has been approved, click on convert to sale to create the sale agreement documents:

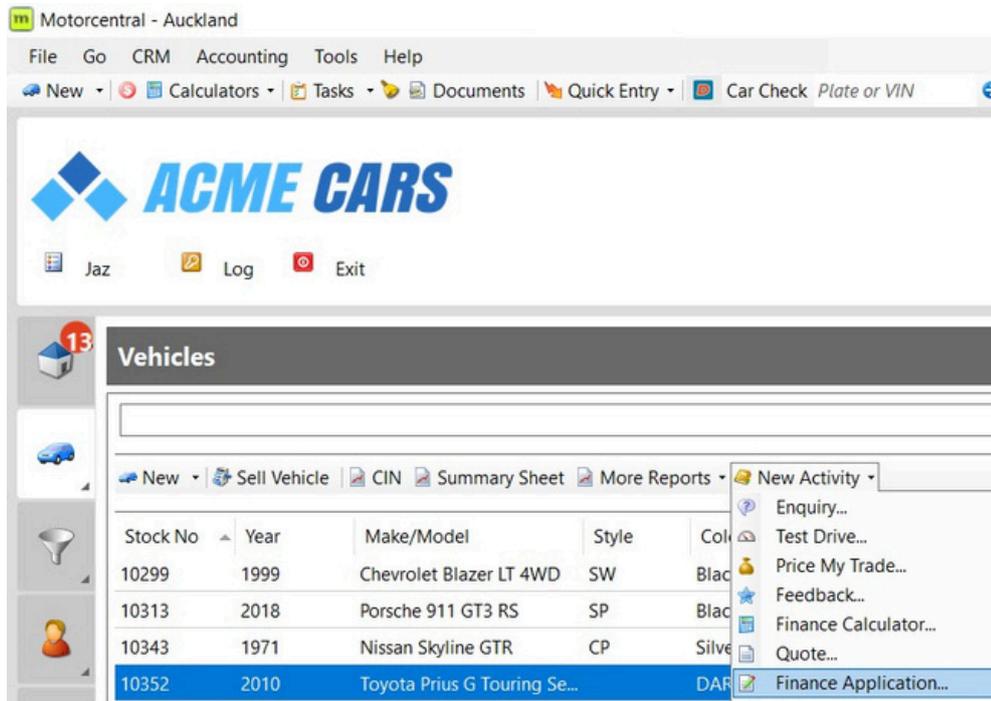


**Please note: don't reuse Finance Application links created through Motorcentral as they hold individuals' personal information and are unique to each customer.**

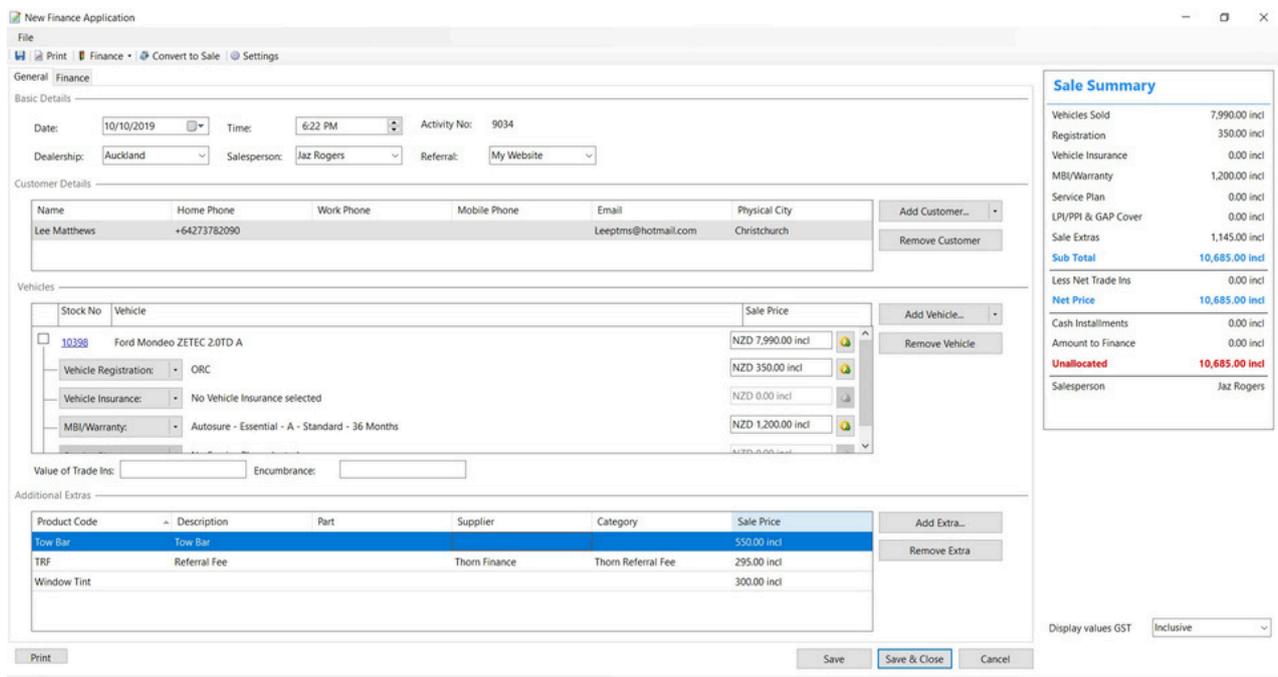
*Creating a Finance Central Application on a new opportunity*

# Creating a new finance application opportunity

Search for the vehicle and click once to highlight.



The below screen will now display. Enter customer details as well as any extra products such as MBI, tow bars, tints, etc. A trade amount can also be added here if applicable.



# Creating a new finance application opportunity

Once all information is entered, navigate to the Finance tab in the top left corner. Gap, PPI and finance information can be added here.

The screenshot shows the 'Finance Application - 9034' window. The 'Finance' tab is active. The 'GAP Cover' section has 'No GAP Cover selected' and a 'GAP Cover Sale Price' of 'NZD 0.00 incl'. The 'LPI/PPI' section has 'No LPI/PPI selected' and an 'LPI/PPI Sale Price' of 'NZD 0.00 incl'. The 'Cash Installments' section has 'Deposit On Signing' and 'Due On Delivery' fields. The 'Finance Information' section has 'Financier', 'Term', 'Amount to Finance', and 'Establishment Fee' fields. A 'Remove Finance' button is present. The 'Notes' section is empty. The 'Sale Summary' panel on the right shows a list of items and their values, including 'Vehicles Sold' (7,990.00 incl), 'Registration' (350.00 incl), 'Vehicle Insurance' (0.00 incl), 'MBI/Warranty' (1,200.00 incl), 'Service Plan' (0.00 incl), 'LPI/PPI & GAP Cover' (0.00 incl), 'Sale Extras' (1,145.00 incl), 'Sub Total' (10,685.00 incl), 'Less Net Trade Ins' (0.00 incl), 'Net Price' (10,685.00 incl), 'Cash Installments' (0.00 incl), 'Amount to Finance' (0.00 incl), 'Unallocated' (10,685.00 incl), and 'Salesperson' (Jaz Rogers). The 'Display values GST' dropdown is set to 'Inclusive'.

If the customer has a deposit, enter it in the deposit on signing field.

The screenshot shows the 'Cash Installments' section. It has two input fields: 'Deposit On Signing' and 'Due On Delivery'. Each field has a currency icon (NZD) to its right.

This screen is also where the finance company, establishment fee and amount to finance can be added.

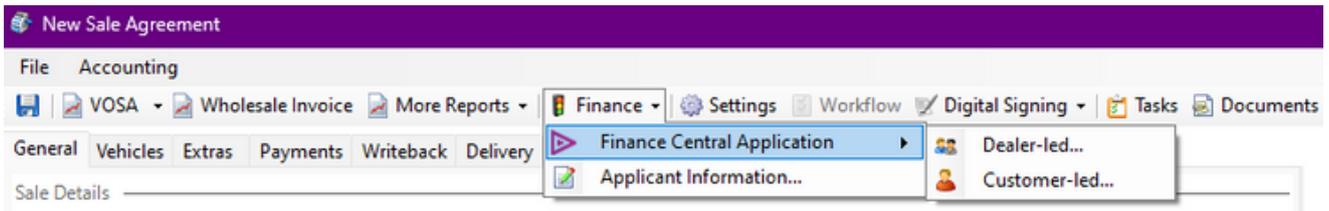
The screenshot shows the 'Finance Information' section. It has the following fields: 'Financier' (Avanti Finance Ltd), 'Term' (Month), 'Amount to Finance' (10685.00), 'Establishment Fees' (NZD 205.00 incl), and 'Referral Fees' (NZD 500.00 incl). There is a 'Remove Finance' button.

Once the finance information above is entered, navigate up to the Finance button on the menu bar.

The screenshot shows the menu bar of the software. The 'Finance' button is highlighted, indicating it is the selected option. The menu bar also includes 'File', 'Print', 'Convert to Sale', and 'Settings'.

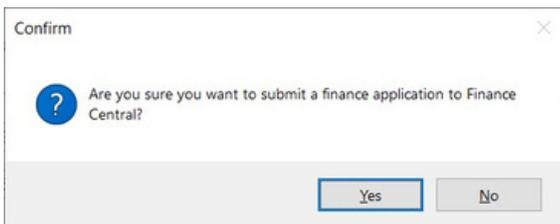
# Creating a new finance application opportunity

This will provide two options - Select "Submit to Finance Central".



Motorcentral will now create a unique finance application for the customer.

A prompt will confirm that the application will be submitted to Finance Central.



The Finance Summary on the bottom left side of the Sale Payment screen will change from the standard screen in Example 1.

It will now display the Finance Central information as per Example 2:

Example 1

Sale Summary	
Vehicles Sold	0.00 incl
Registration	0.00 incl
Vehicle Insurance	0.00 incl
MBI/Warranty	0.00 incl
Service Plan	0.00 incl
LPI/PPI & GAP Cover	0.00 incl
Sale Extras	595.00 incl
<b>Sub Total</b>	<b>595.00 incl</b>
Less Net Trade Ins	0.00 incl
<b>Net Price</b>	<b>595.00 incl</b>
Cash Installments	0.00 incl
Amount to Finance	595.00 incl
<b>Unallocated</b>	<b>0.00 incl</b>
Payments to Date	0.00 incl
<b>Money Outstanding</b>	<b>595.00 incl</b>
Salesperson	Jaz Rogers

Finance Summary	
Thorn Group Financial	690.00
0 Months at .00%	
Interest	-690.00
Cost of Finance	-690.00
<b>Monthly: .00</b>	<b>Weekly: .00</b>
<b>Fortnightly: .00</b>	<b>Week (48): .00</b>

Display values GST  Inclusive

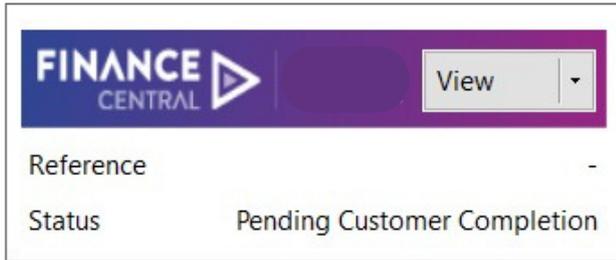
Example 2

Sale Summary	
Vehicles Sold	20,000.00 incl
Registration	0.00 incl
Vehicle Insurance	0.00 incl
MBI/Warranty	0.00 incl
Service Plan	0.00 incl
LPI/PPI & GAP Cover	3,226.85 incl
Sale Extras	0.00 incl
<b>Sub Total</b>	<b>23,226.85 incl</b>
Less Net Trade Ins	0.00 incl
<b>Net Price</b>	<b>23,226.85 incl</b>
Cash Installments	0.00 incl
Amount to Finance	23,226.85 incl
<b>Unallocated</b>	<b>0.00 incl</b>
Payments to Date	0.00 incl
<b>Money Outstanding</b>	<b>20,000.00 incl</b>
Salesperson	Jaz Rogers

FINANCE CENTRAL	
Reference	-
Status	Pending Customer Completion

# Creating a new finance application opportunity

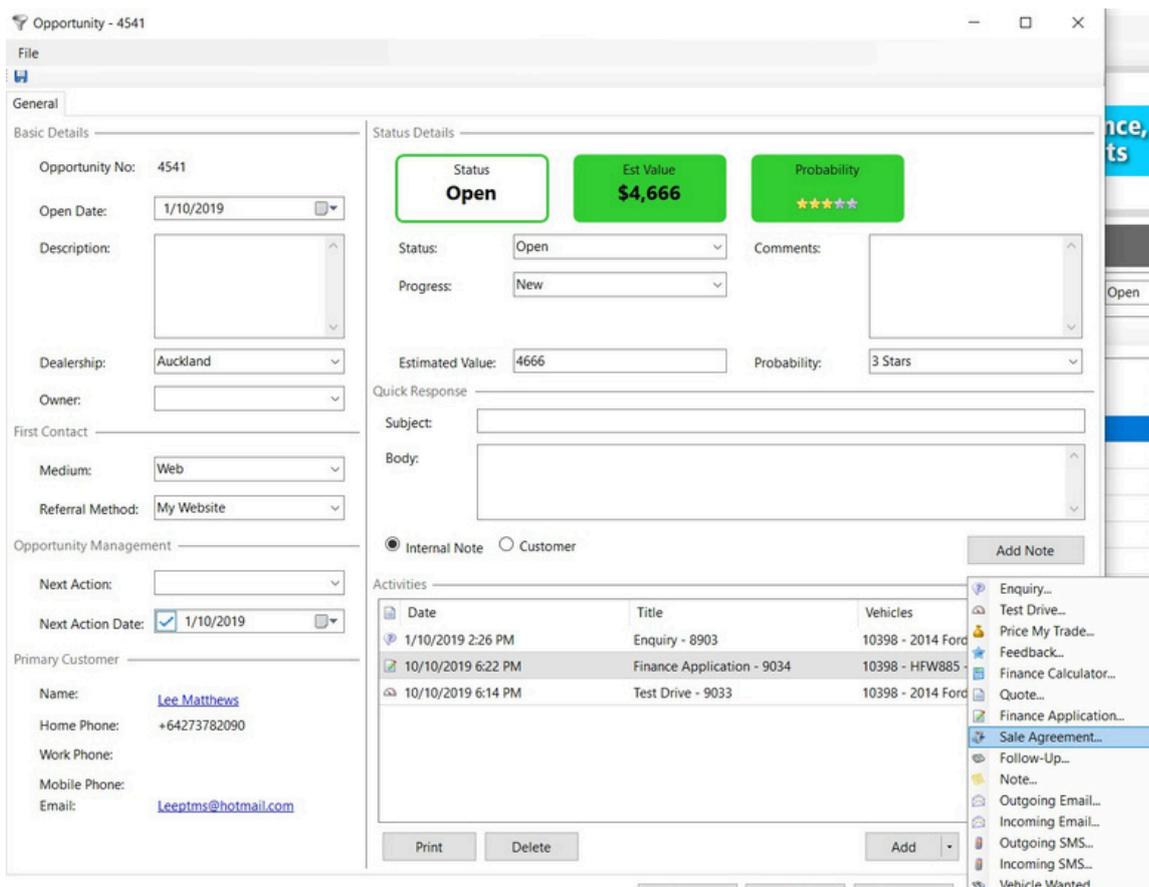


The Finance Central icon will allow the following functions:

View – clicking on “View” will launch a window providing you with the ability to copy and paste the link and forward it to the customer.

Arrow – clicking on the arrow beside the view button will allow you to refresh the status of the application.

Once the application has been approved, click on convert to sale to create the sale agreement documents.

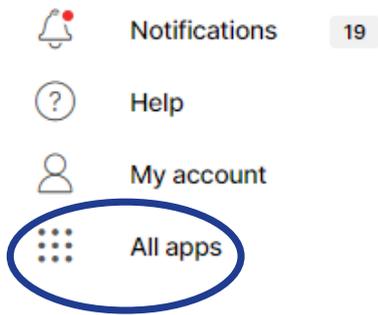


**Please note: Do not reuse Finance Application Links created through Motorcentral as they hold individuals' personal information and are unique to each customer.**

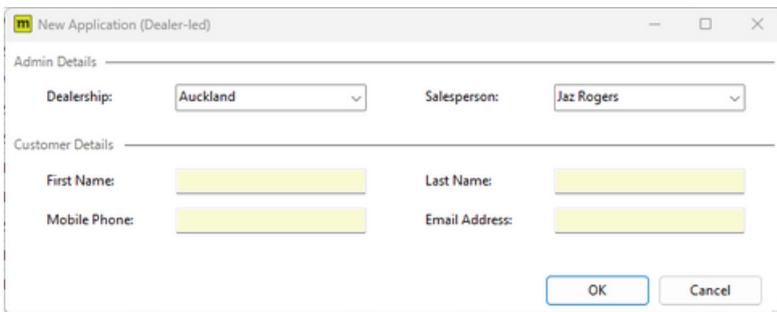
*Creating a Finance Central application  
through the Motorcentral app quick link*

# Creating an application via Motorcentral quick link

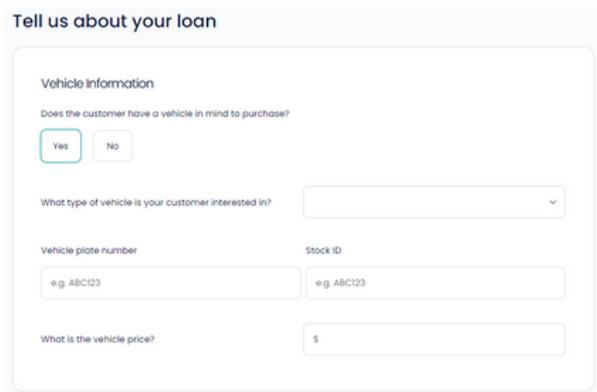
From the main Motorcentral app.



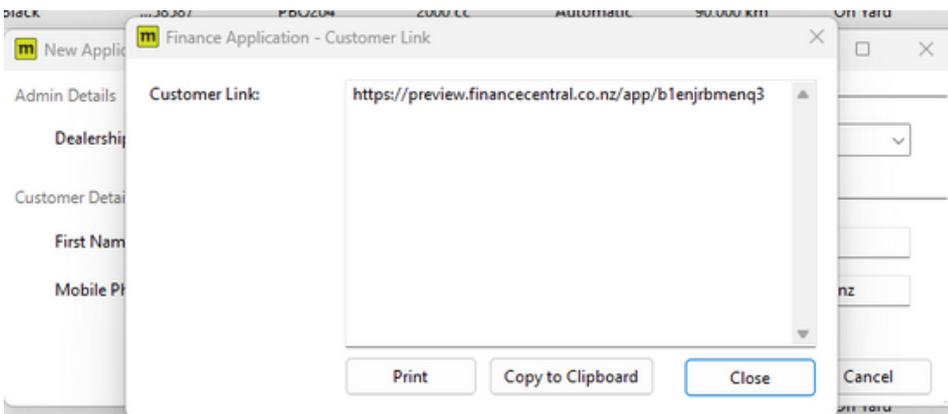
You'll now be asked to enter the customer's information, as per the example below, to allow an application to be created.



Once the information is entered and the OK button is selected, the application page will be directed to the welcome screen to allow the application process to be completed.



If Customer-led is selected, the box below will be displayed to allow the link to be sent to the customer for completion.

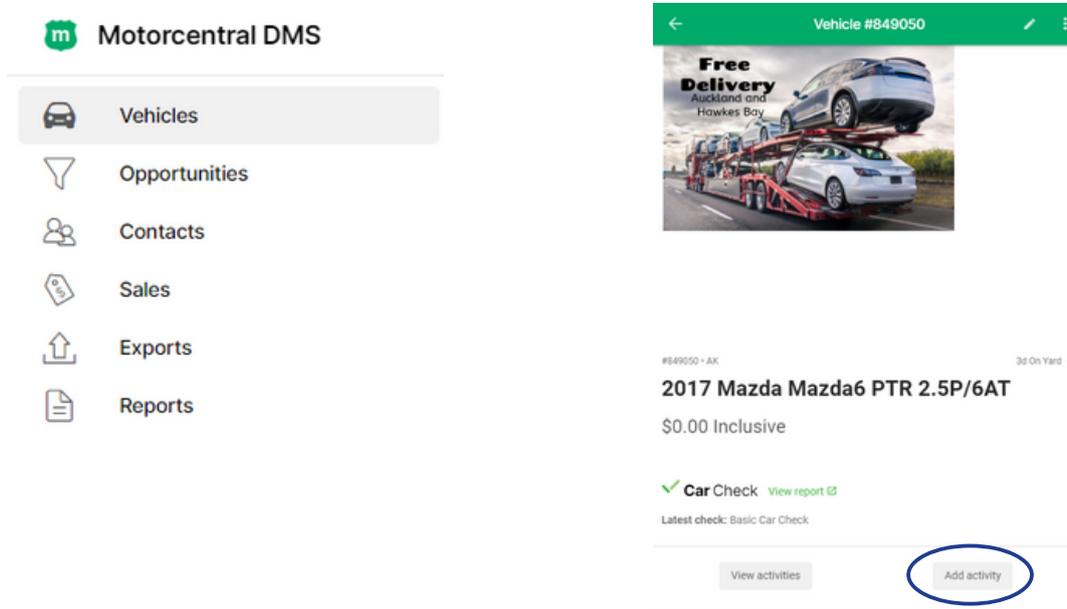


*Creating a Finance Central application  
through the Motorcentral app (opportunity)*

# Creating an application through the Motorcentral app

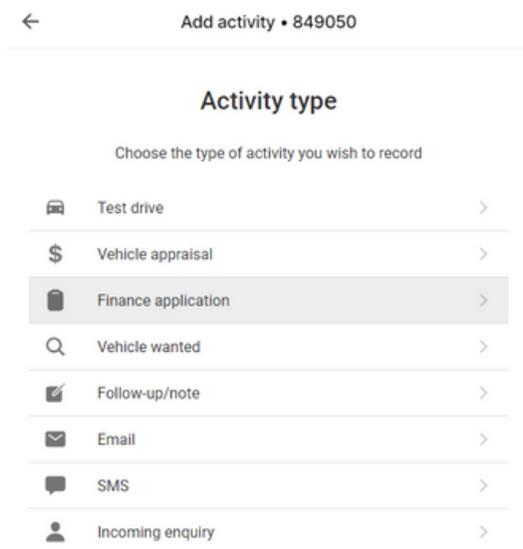
A Finance Central application can be created through a vehicle, an opportunity or a contact.

Step 1: Find the vehicle you want to create a Finance Central application for. Under the Vehicles tab, search for the vehicle you'd like to create a Finance Central application for and click on Add activity.



Step 2: Select 'Finance application'.\*

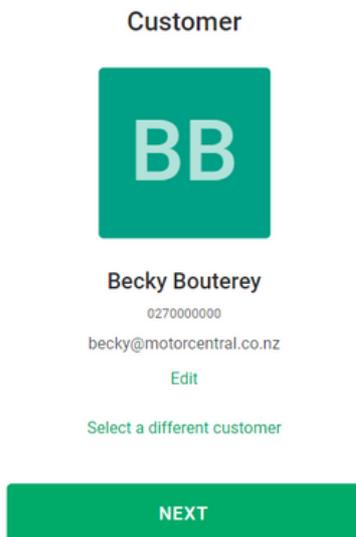
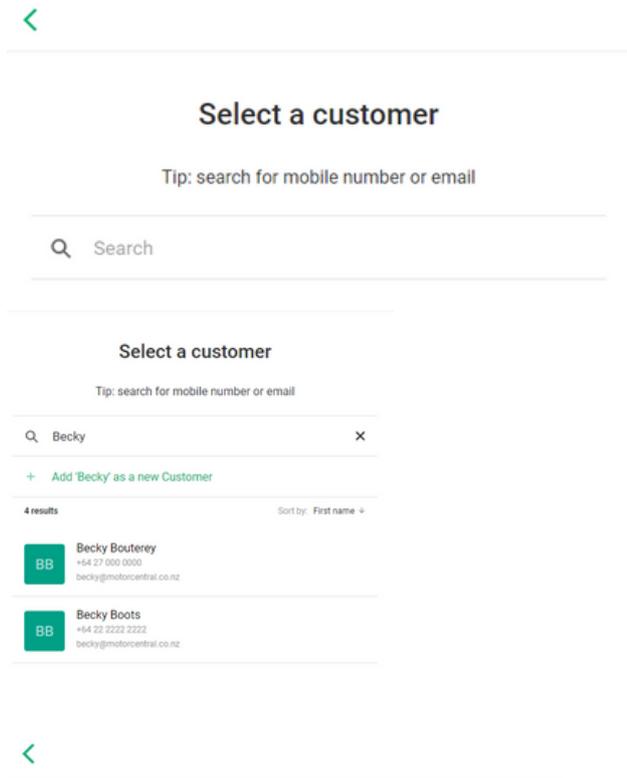
\*Note – This step is only required if you're adding a Finance application to a vehicle.



# Creating an application through the Motorcentral app

Step 3: Add the customer to activity and select NEXT.

Please note: It's recommended to search for the customer first before adding a new customer to ensure that duplicate customers are not created in the database.



# Creating an application through the Motorcentral app

Step 4: Enter required sections below.

<

### Finance application details

Enter the following information to complete your finance application.

Vehicle sale price	20000	X
Value of trade ins	5000	X
Encumbrance	1000	X
Net trade ins	\$4,000.00	
Deposit on signing	500	X
Payment due on delivery	0	X
Cash deposits total	\$500.00	
Amount to finance	\$15,500.00	

**NEXT**

Step 5: Submit the application to Finance Central.

The information is now ready to be sent to Finance Central to allow an application to be created. Ensure the slider bar is green and select Finish.

You now have the option to select Dealer-led or Customer-led. Once the application path has been selected, you'll be redirected to the application or have the option to send it to the customer.

## FINANCE CENTRAL

Do you wish to submit this application to Finance Central?

Submit to Finance Central

After submitting you will be able to share the application website address with your customer.

Dealer-led application

Submit dealer-led rather than customer-led application.

**FINISH**

## Create application

## FINANCE CENTRAL

Choose the type of application you wish to create:

New application (dealer-led) >

New application (customer-led) >

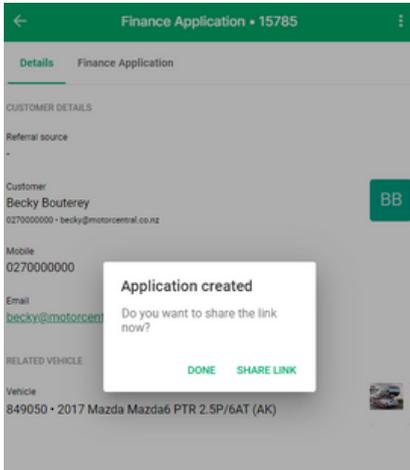
[Go to the dealer portal](#)

# Creating an application through the Motorcentral app

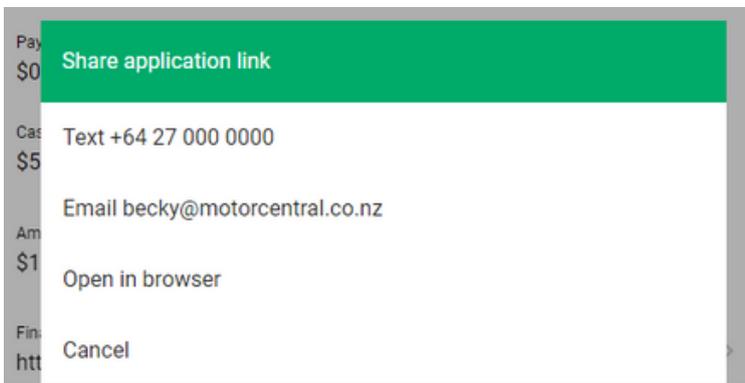
Step 6: Share application link with customer (if Customer-led is selected).

The option to share the application link with the customer will now pop up. If you require the customer to complete their part of the application, select SHARE LINK.

If the application link does not need to be sent to the customer select DONE.



Once you select SHARE LINK, you can share the application link via text or email. The application can also be opened directly into a web browser.



# Creating an application through the Motorcentral app

The below message is what will be sent to the client.

Hi Becky,

Your finance application link is:

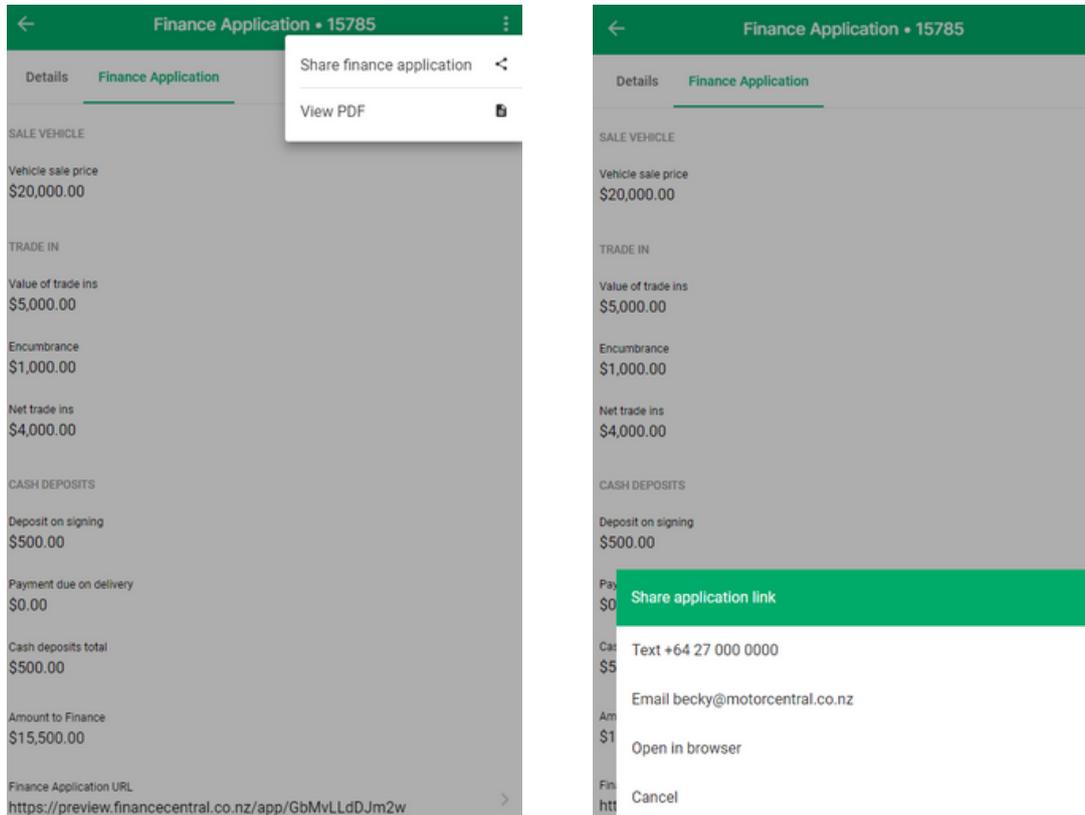
<https://financecentral.co.nz/loadmyapp/a60N0000001LM6BI>

AW

**Note:** You can edit the target phone number or email address, and can modify the message to suit your needs.

## How to share an existing Finance Application with a customer

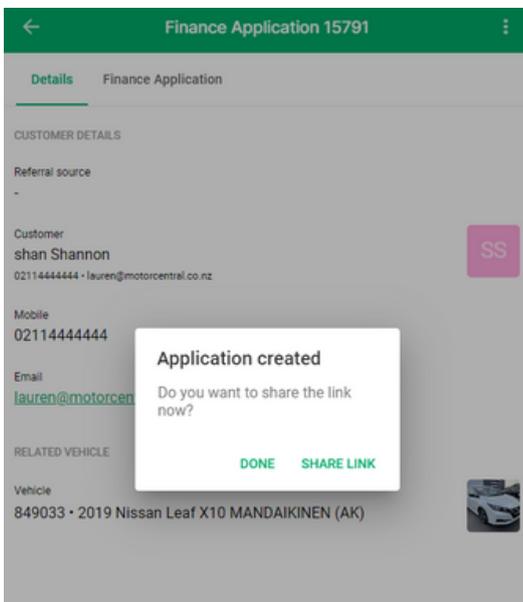
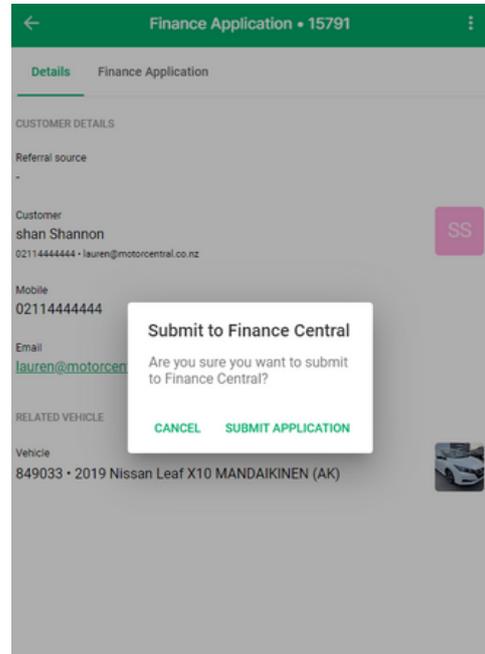
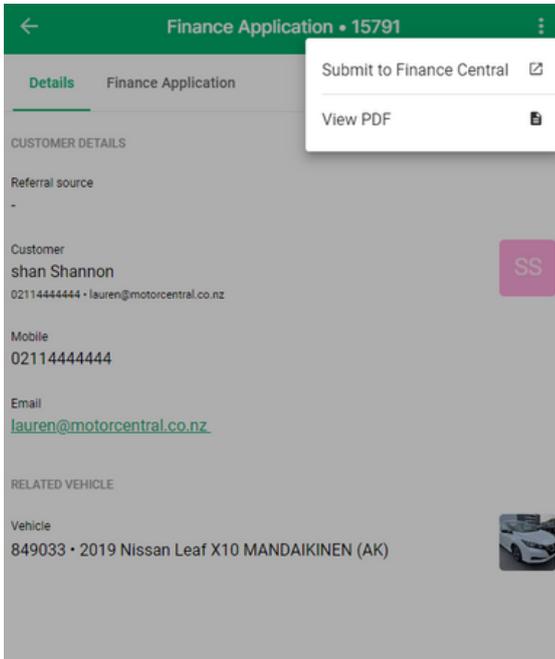
An application can be shared at any time by going back into the activity, opportunity or contact, clicking on the three dots in the top right-hand corner and selecting Share finance application.



# Creating an application through the Motorcentral app

To submit an application to Finance Central that has been saved but not submitted, select the finance application in opportunities, click on the three-dot menu in the top right-hand corner of the Finance Application. Select Submit to Finance Central.

Once submitted, you'll then have the option to share the application with the customer as per the example above.



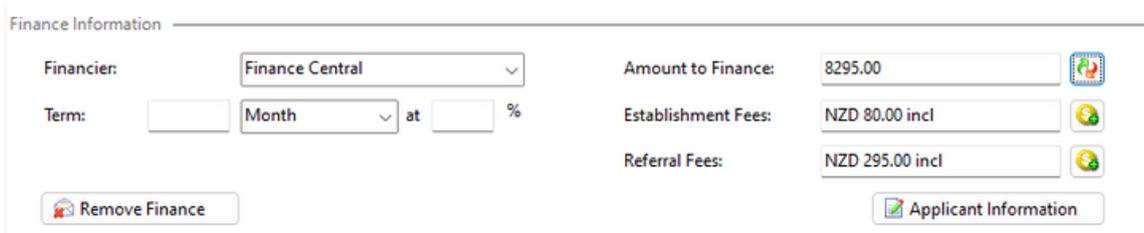
# *Creating a Finance Central application in a Motorcentral sale*

# Creating an application in a Motorcentral sale

Create the sale as per the normal process in Motorcentral.

Ensure all insurances, extras and the Finance Central referral fee are added.

On the payment tab, ensure that the amount financed is entered as per the example below.

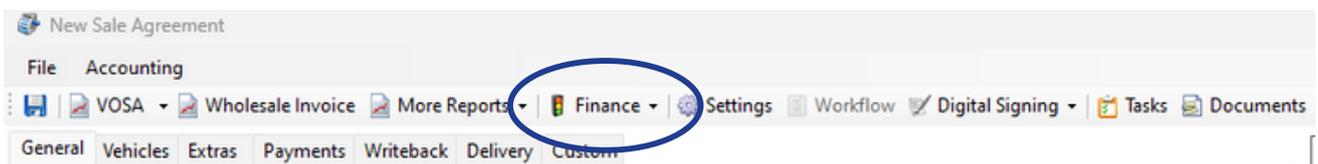


The screenshot shows the 'Finance Information' form. It includes the following fields and values:

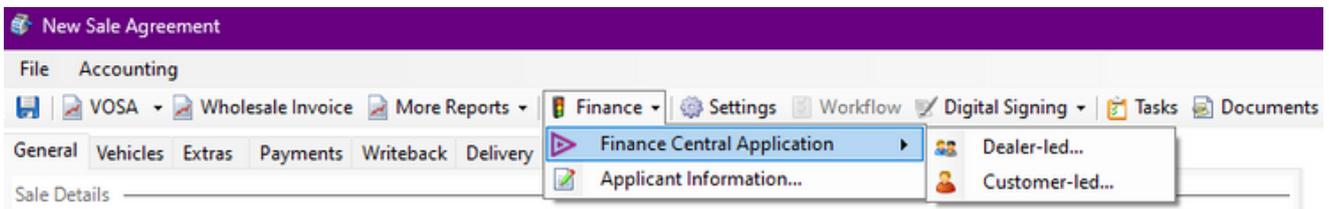
Financier:	Finance Central	Amount to Finance:	8295.00
Term:	Month at %	Establishment Fees:	NZD 80.00 incl
		Referral Fees:	NZD 295.00 incl

Buttons: Remove Finance, Applicant Information

Once all information is added, navigate up to the Finance button on the Sale Menu.



This will provide two options - Select "Submit to Finance Central".



Motorcentral will now connect with Finance Central to create a unique finance application for the customer named on the VOSA.

# Creating an application in a Motorcentral sale

The Finance Summary on the left side of the Sale Payment screen will change from the standard screen in Example 1.

It will now display the Finance Central information as per Example 2 below.

Example 1

Sale Summary	
Vehicles Sold	8,295.00 incl
Registration	0.00 incl
Clean Car Fee	0.00 incl
Vehicle Insurance	0.00 incl
MBI/Warranty	0.00 incl
LPI/PPI & GAP Cover	0.00 incl
Sale Extras	0.00 incl
<b>Sub Total</b>	<b>8,295.00 incl</b>
Less Net Trade Ins	0.00 incl
<b>Net Price</b>	<b>8,295.00 incl</b>
Cash Installments	0.00 incl
Amount to Finance	8,295.00 incl
Unallocated	0.00 incl
Payments to Date	0.00 incl
<b>Money Outstanding</b>	<b>8,295.00 incl</b>
Salesperson	Jaz Rogers

Finance Summary	
Finance Central	8,670.00
0 Months at .00%	
Interest	-8,670.00
Cost of Finance	-8,670.00
Monthly: .00	Weekly: .00
Fortnightly: .00	Week (48): .00

Display values GST

Example 2

Sale Summary	
Vehicles Sold	8,295.00 incl
Registration	0.00 incl
Clean Car Fee	0.00 incl
Vehicle Insurance	0.00 incl
MBI/Warranty	0.00 incl
LPI/PPI & GAP Cover	0.00 incl
Sale Extras	0.00 incl
<b>Sub Total</b>	<b>8,295.00 incl</b>
Less Net Trade Ins	0.00 incl
<b>Net Price</b>	<b>8,295.00 incl</b>
Cash Installments	0.00 incl
Amount to Finance	8,295.00 incl
Unallocated	0.00 incl
Payments to Date	0.00 incl
<b>Money Outstanding</b>	<b>8,295.00 incl</b>
Salesperson	Jaz Rogers

FINANCE CENTRAL	
<b>View</b>	▼
Reference	-
Status	Pending Dealer Completion

The Finance Central icon will allow the following functions:

View – clicking on “View” will launch a window providing you with the ability to copy and paste the link and forward it to the customer.

FINANCE CENTRAL	
<b>View</b>	▼
Reference	-
Status	Pending Dealer Completion

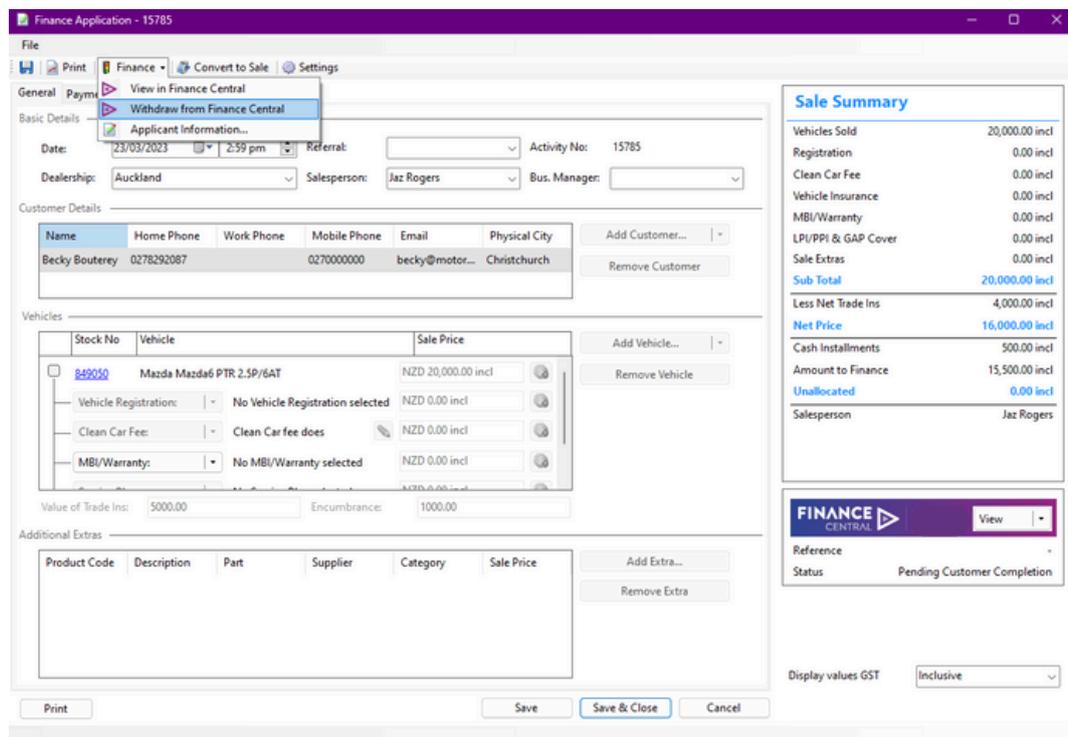
Arrow - clicking on the arrow beside the view button will allow you to refresh the status of the application.

**Please note: Each customer requires a new finance application to be created, as each applications holds personal customer information.**

*Removing an application from an  
opportunity/sale agreement in  
Motorcentral*

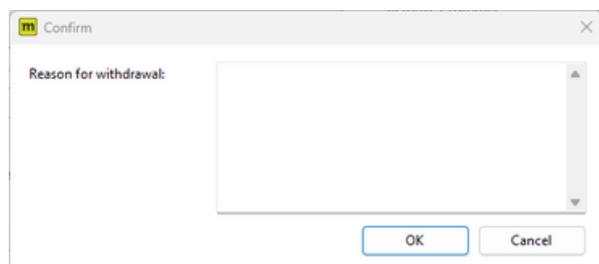
# Removing opportunity/sale agreement

Navigate to the Finance traffic light button in the top tool bar of the opportunity or Sale Agreement screen. Select Withdraw from Finance Central.



**It's important the application shows a status of Declined or Withdrawn in the Finance Central system.**

A confirmation box will be presented to allow for a reason to be entered before clicking OK.



If OK is selected, Finance Central will then be removed and the Motorcentral standard Finance Summary box will be shown.

Finance Summary	
	15,500.00
0 Months at .00%	
Interest	-15,500.00
Cost of Finance	-15,500.00
Monthly: .00	Weekly: .00
Fortnightly: .00	Week (48): .00

Display values GST Inclusive



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