



AVANTI | FINANCE

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

Creating a Finance Central application through 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.

m New Application (De	aler-led)			-		\times
Admin Details						
Dealership:	Auckland ~	Salesperson:	Jaz Rogers			~
Customer Details						
First Name:		Last Name:				
Mobile Phone:		Email Address:				
			ОК		Cancel	

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

Vehicle Information	
Does the customer have a vehicle in mind to purchase?	
Yes No	
What type of vehicle is your customer interested in?	
Vehicle plote number	Stock ID
e.g. A8C123	e.g. ABC123

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 by 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.

Opportur	itie	s							
jade									
🥝 New Activi	ty •	Convert to Sale	e						
Open Date		Referral Method	۲	Primary Customer	Owner	Est Value	Last Activity	Medium	Last Act Vehicle
10/02/2023		Need A Car	0	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.

P Opportunity - 5947							- 0	\times
File								
🚽 🗟 Documents								
General Custom								
Basic Details								
Opportunity No:	5947	Status		Est Value	Probabi	lity		
Open Date:	10/02/2023	Open		\$45,550	***	र प्रदे		
Description:	A	Status:	Open	~	Comments:			-
		Assignee:	New	~				
	Ψ							Ŧ
Dealership:	Auckland 🗸	Estimated Value:	43590		Probability:	3 Stars		~
Owner:	Jaz Rogers 🗸 🗸	Quick Response						_
First Contact		Subject:						
Medium:	Web ~	Body:						^
Referral Method:	Need A Car 🗸							w
Opportunity Manageme	nt	 Internal Note 	Customer Er	mail			Add Note	
Next Action:	~	Activities						
Next Action Date:	10/02/2023	Date		🔺 Title		Vehicles		
Diana Catana		🕐 22/03/2023 1:17 p	m	Enquiry - 15767		849033 - 2019 Nist	ian Leaf	
Manar	lada Elinestona	△ 22/03/2023 1:18 p	m	Test Drive - 15768		849033 - 2019 Niss	an Leaf	
Home Phone:	adernitestone							
Work Phone:								
Mobile Phone:	0275342374							
Email:	jaz@motorcentral.co.nz	Print	Delete			Add +	Convert To	•
		1			Save	Save & Clo	se Cano	cel
aved								

💎 Opportunity - 5947							– o ×	
File								-
🛃 🗟 Documents								
General Custom								EV C
Basic Details								sup
Opportunity No:	5947	Status		Est Value	Probabili	ty		-
Open Date:	10/02/2023			\$45,550	***	*		
Description:	l l	Status: Assignee:	Open New	~ ~	Comments:		A	× ~
							w	Price
Dealership:	Auckland	Estimated Value:	43590		Probability:	3 Stars	~	
Owner:	Jaz Rogers	Quick Response						-
First Contact	·	Subject:						
Medium:	Web	Body:					A	
Referral Method:	Need A Car						w	
Opportunity Manageme	nt	 Internal Note 	Customer E	mail			Add Note	
Next Action:		Activities						-
Next Action Date:	2 10/02/2023	Date Date		🔺 Title		Vehicles		
Primary Customer			pm	Enquiry - 15767		849033 - 2019 Nissa	an Leaf	
Name: Home Phone:	Jade Flinestone	Ω 22/03/2023 1:18	pm	Test Drive - 15768		849033 - 2019 Nissa	in Leaf	
Work Phone: Mobile Phone:	0275342374						② Enquiry	
Email:	jaz@motorcentral.co.nz	Print	Delete			Add 🛛	 Test Drive Trade Appraisal. 	
Saved					Save	Save & Clos	Feedback Finance Calcula Quote	tor
							Finance Applica	tion

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.

File				
🛃 📄 Print 🛛 🚦 Finance 👻 🐉 Convert to Sale 🛛 🍈 Settings				
General Payments			Sale Summary	
Basic Details			- White Cald	0.00 (1
Date: 22/03/2023 🖉 1:19 pm 🗘 Referral:	Need A Car 🗸	Activity No: 15769	Registration	0.00 incl
Desterbing Auchland Salernerron	laz Pagarr	Rue Manager	Clean Car Fee	0.00 incl
Salesperson:	Jaz Rogers V	bus. manager.	Vehicle Insurance	0.00 incl
Customer Details			MBI/Warranty	0.00 incl
Name Home Phone Work Phone Mobile Phone	Email Physic	al City Add Customer 💌	LPI/PPI & GAP Cover	0.00 incl
Jade Flinestone 0275342374	jaz@motorcen Wanaka	Remove Customer	Sale Extras	1,195.00 incl
			Sub Total	1,195.00 incl
Vehicler			Less Net Trade Ins	0.00 incl
Stock No. Vabida	Sala Drica		Net Price	1,195.00 incl
SIGCKING VEHICLE	Sale Price	Add Vehicle •	Cash Installments	0.00 incl
B49033 Nissan Leaf X10 MANDAIKINEN	NZD 0.00 incl	💫 Remove Vehicle	Amount to Finance	0.00 incl
Vehicle Registration: No Vehicle Registration selected	d NZD 0.00 incl	0	Unallocated	1,195.00 incl
Class Car See	NZD 0.00 incl		Salesperson	Jaz Rogers
MBI/Warranty: No MBI/Warranty selected	NZD 0.00 incl			
	N7D-0-00 (e.e)			
Value of Trade Ins: Encumbrance:				
Additional Extras			-	
Product Code Description Part Supplier	Category Sale Pr	ice Add Extra		
FCFF Referral Fee Finance Central	Finance Centra 295.00 i	ncl Remove Extra		
Towbar Solid Steel (Jap Towbar Excellent Autos	900.00 i	ncl		
			Display values GST	Inclusive \lor
Drint	C .	we Swe & Close Concel		
Film		Save of close Cancel		

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.

eneral Payments				Sale Summary	/
GAP Cover: V No GAP Cover selected	GAP Cover Sale Price:	NZD 0.00 incl	6	Vehicles Sold Registration Clean Car Fee Vehicle Insurance	15,000.00 in 0.00 in 0.00 in 0.00 in
LPI/PPI: . No LPI/PPI selected	LPI/PPI Sale Price:	NZD 0.00 incl	Ø	MBI/Warranty LPI/PPI & GAP Cover Sale Extras Sub Total	0.00 in: 0.00 in: 1,195.00 in: 16,195.00 in:
beposit On Signing:	Due On Delivery:		4	Less Net Trade Ins Net Price Cash Installments	0.00 in 16,195.00 in 0.00 in
Financier: Finance Central V	Amount to Finance:	16195.00	\$	Amount to Finance Unallocated	16,195.00 in 0.00 in
lerm: Month v at 76	Establishment Fees: Referral Fees:	NZD 80.00 incl NZD 295.00 incl		Salesperson	Jaz Roge
Remove Finance				Finance Summ	narv
Notes:			*	Finance Central 0 Months at .00%	16,570.0
				Interest Cost of Finance	- 16,570.0 - 16,570.0
			Ŧ	Monthly: .00 Fortnightly: .00	Weekly: .00 Week (48): .00
				Display values GST	Inclusive

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

Cash Installments			
Deposit On Signing:	82	Due On Delivery:	8

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

inancier:	Finance Central 🗸 🗸	Amount to Finance:	16195.00	(2
Term:	Month v at %	Establishment Fees:	NZD 80.00 incl	S
		Referral Fees:	NZD 295.00 incl	8

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



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

💰 New Sale Agreement		
File Accounting		
🛃 🛛 🔁 VOSA 👻 Wholesale Invoice 🍃 More Reports 👻	🚦 Finance 👻 🏟 Settings 📓 Workflow 🏢	🖉 Digital Signing 👻 📄 Tasks 🗟 Documents
General Vehicles Extras Payments Writeback Delivery	Finance Central Application	States Dealer-led
Sale Details	Applicant Information	🚨 Customer-led

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	r
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
Sub Total	8,295.00 incl
Less Net Trade Ins	0.00 incl
Net Price	8,295.00 incl
Cash Installments	0.00 incl
Amount to Finance	8,295.00 incl
Unallocated	0.00 incl
Payments to Date	0.00 incl
Money Outstanding	8,295.00 incl
Salesperson	Jaz Rogers
Finance Summ	nary
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	Inclusive \checkmark

Example 2

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



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:

P Opportunity - 4541							-		
File									
W									
General									
Basic Details									nce,
Opportunity No:	4541	Status		Est Value	Probabi	lity			US .
Open Date:	1/10/2019	Open		\$4,000	****	**			_
Description:	^	Status:	Open	~	Comments:			^	
		Progress:	New	~				- 55-5	Open
								~	
Dealership:	Auckland	Estimated Value:	4666		Probability:	3 Stars		~	
Owner:	×	Quick Response							7
First Contact		Subject:							1
Medium:	Web	Body:						^	3
Referral Method:	My Website] L						~	1
Opportunity Manager	ment	Internal Note	O Customer				A	dd Note	1
Next Action:		Activities					P E	nquiry	
Next Action Date:	1/10/2019	Date	PM	Title Enquiry - 8903		Vehicles 10398 - 2014 Ford		est Drive rice My Trade	-
Primary Customer		2 10/10/2019 6:22	PM	Finance Applicatio	on - 9034	10398 - HFW885 -	F F	eedback	tor
Name:	Lee Matthews	10/10/2019 6:14	PM	Test Drive - 9033		10398 - 2014 Ford		uote	ation
Home Phone:	+64273782090						3 S	ale Agreemer	it
Work Phone:							1 F	ollow-Up	
Mobile Phone:							5 N	lote	
Email:	Leeptms@hotmail.com							ncoming Ema	l
		Print	Delete			Add -	8 0	outgoing SMS	
							8 Ir	ncoming SMS.	-
				6	C 0.01	C 1	00 V	ehicle Wantee	1

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

Search for the vehicle and click once to highlight.

	Auch	and					
File G	o CRM A	accounting Tulators • 🔀 T	Tools Help Tasks - 🍃 🗟 Documents 🕅	Quick Entry	• 🙍 Car	Check Plate or VIN	¢
Ja	az 🛛	Log 💿	CARS Exit				
~							
چې ۲	→ New ・	🐉 Sell Vehicle	e 📔 CIN 🎴 Summary Shee	t 🎴 More Re	eports - 🦂 I	New Activity -	
	New •	 Sell Vehicle Year 	e 📔 CIN 🎴 Summary Shee Make/Model	t 🎽 More Re Style	eports • 🚑 I @ Cole 🕰	New Activity • Enquiry Test Drive	
* *	New · Stock No 10299	 Sell Vehicle Year 1999 	e CIN R Summary Shee Make/Model Chevrolet Blazer LT 4WD	t 🖻 More Re Style SW	eports • 🚑 I ⑦ Col 🕰 Blac 🍝	New Activity + Enquiry Test Drive Price My Trade	
*	 New Stock No 10299 10313 	 Sell Vehicle Year 1999 2018 	e RIN Rake/Model Make/Model Chevrolet Blazer LT 4WD Porsche 911 GT3 RS	t More Re Style SW SP	eports - 4 1 7 Col a Blac Blac	New Activity • Enquiry Test Drive Price My Trade Feedback	
	 New Stock No 10299 10313 10343 	 Sell Vehicle Year 1999 2018 1971 	e RIN Reward Summary Shee Make/Model Chevrolet Blazer LT 4WD Porsche 911 GT3 RS Nissan Skyline GTR	t More Re Style SW SP CP	eports • 🛹 1 Col 🕰 Blac Blac Silve	New Activity Enquiry Test Drive Price My Trade Feedback Finance Calculator Quote	

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.

New Finance Application								- 0 >
le								
Print 🖡 Finance • 🐉	Convert to Sale @ Settings							
neral Finance							Sale Summary	
Date: 10/10/2019	Time:	6:22 PM	Activity No: 9034				Vehicles Sold Registration	7,990.00 incl 350.00 incl
Dealership: Auckland	 Salesperson: 	Jaz Rogers 🗸 🗸	Referral: My Website	~			Vehicle Insurance	0.00 incl
stomer Details							MBI/Warranty	1,200.00 incl
Name	Home Phone	Work Phone	Mobile Phone	Email	Physical City	Add Customer	Service Plan LPI/PPI & GAP Cover	0.00 incl 0.00 incl
Lee maturens	101213102030			ceepunsenounail.com	Christellaren	Remove Customer	Sale Extras Sub Total	1,145.00 incl 10,685.00 incl
ehicles							Less Net Trade Ins	0.00 incl 10,685.00 incl
Stock No Vehicle					Sale Price	Add Vehicle_ •	Cash Installments	0.00 incl
10398 Ford Mor	ideo ZETEC 2.0TD A				NZD 7,990.00 incl	Remove Vehicle	Amount to Finance	0.00 incl
- Vehicle Registration:	ORC				NZD 350.00 incl		Unallocated	10,685.00 incl
- Vehicle Insurance:	No Vehicle Insurance s	selected			NZD 0.00 incl		Salesperson	Jaz Rogers
	Autosure - Essential -	A - Standard - 36 Months			NZD 1,200.00 incl			
	1				NTD 0.00 lest			
Value of Trade Ins:	Encumb	orance:						
Iditional Extras		diam.	Transmission	1		1	70.	
Product Code	 Description 	Part	Supplier	Category	Sale Price	Add Extra_		
TOW Bar	Referral Fee		Thom Finance	Thom Referral Fee	295.00 incl	Remove Extra		
Window Tint	The rest of the		THE TRANSPORT	invertier all ree	300.00 incl			
							_	
L						1	Display values GST	lusive
Print					Save	Save & Close Cancel		

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.

Finance Application - 9034						- a ×
File						
Grand Finance • @ Convert to sale @ Settings					0.50	
CAD Cause				Sal	e Summai	ry
				Vehic	les Sold	7,990.00 incl
GAP Cover: • No GAP Cover selected				Regis	tration	350.00 incl
	GAP Cover Sale Price:	NZD 0.00 incl		Vehic	le Insurance	0.00 incl
DI/DDI		and a second sec		MBI/	Warranty	1,200.00 incl
rypn				Servi	e Plan	0.00 incl
LPI/PPI: - No LPI/PPI selected				LPI/P	PI & GAP Cover	0.00 incl
	LPI/PPI Sale Price:	NZD 0.00 incl		Sale	Extras	1,145.00 incl
"sels foretalles ante				Sub 1	otal	10,685.00 incl
ash instaiments				Less	Net Trade Ins	0.00 incl
Deposit On Signing:	Due On Delivery:	<i>b</i>		Net	rice	10,685.00 incl
inance Information				Cash	Installments	0.00 incl
Presenter	Amount to Finness			Amo	ant to Finance	0.00 incl
Financier:	Amount to Finance:			Unal	ocated	10,685.00 incl
Term: Month v at %	Establishment Fee:	NZD 0.00 incl		Sales	person	Jaz Rogers
Remove Finance						
later .						
voies -						
Notes:		<u>^</u>				
		~				
				Dist	unders CCT	[testudius
				Displa	y values 051	- come
Print			Save Save &	Close Cancel		

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

Cash Installments			
Deposit On Signing:	R	Due On Delivery:	R

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

Financier:	Avanti Finance Ltd \sim	Amount to Finance:	10685.00	<i>8</i> 2
Term:	Month ~ at %	Establishment Fees:	NZD 205.00 incl	•
		Referral Fees:	NZD 500.00 incl	0
Remove Finance				

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



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

💰 New Sale Agreement		
File Accounting		
🛃 🎽 VOSA 👻 Wholesale Invoice 🍃 More Reports 👻	🚦 Finance 🖌 🏟 Settings 💿 Workflow 🛛	🖉 Digital Signing 👻 📴 Tasks 👼 Documents
General Vehicles Extras Payments Writeback Delivery	Finance Central Application	State - Ied
Sale Details	Applicant Information	Sustomer-led

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

oure ourminu	,
Vehicles Sold	0.00 incl
Registration	0.00 incl
Vehicle Insurance	0.00 inc
MBI/Warranty	0.00 incl
Service Plan	0.00 inc
LPI/PPI & GAP Cover	0.00 incl
Sale Extras	595.00 incl
Sub Total	595.00 inc
Less Net Trade Ins	0.00 inc
Net Price	595.00 inc
Cash Installments	0.00 inc
Amount to Finance	595.00 incl
Unallocated	0.00 inc
Payments to Date	0.00 incl
Money Outstanding	595.00 inc
Salesperson	Jaz Rogers
Finance Sum	mary
Thorn Group Financia	690.00
0 Months at .00%	
Interest	-690.00
Cost of Finance	-690.00
Monthly: .00	Weekly: .00
Fortnightly: .00	Week (48): .00
Diselau values CCT	Inclusive

Example 2

Vehicles Sold	20,000.00 inc
Registration	0.00 inc
Vehicle Insurance	0.00 inc
MBI/Warranty	0.00 inc
Service Plan	0.00 inc
LPI/PPI & GAP Cover	3,226.85 inc
Sale Extras	0.00 inc
Sub Total	23,226.85 inc
Less Net Trade Ins	0.00 inc
Net Price	23,226.85 inc
Cash Installments	0.00 inc
Amount to Finance	23,226.85 inc
Unallocated	0.00 inc
Payments to Date	0.00 inc
Money Outstanding	20,000.00 inc
Salesperson	Jaz Roger
	View -
Reference	
Status Pending (ustomer 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.

P Opportunity - 4541							- 0	×	
File									
W									
General									
Basic Details									nce,
Opportunity No:	4541	Status		Est Value	Probabi	lity			us
Open Date:	1/10/2019	open		\$4,000	****	**			_
Description:	^	Status:	Open	~	Comments:			^	
		Progress:	New	~					Open
Dealership:	Auckland	Estimated Value:	4666		Probability:	3 Stars		~	
Owner:	~	Quick Response							7
First Contact		Subject:							1
Medium:	Web] Body:						^	3
Referral Method:	My Website V] [~	1
Opportunity Manager	nent	Internal Note	O Customer				Add Not	te	1
Next Action:	~	Activities					Enquiry		-
Next Action Date:	1/10/2019	Date	PM	Title Enquiry - 8903		Vehicles 10398 - 2014 Ford	 Test Dri Price M 	ve y Trade	
Primary Customer		2 10/10/2019 6:22	PM	Finance Application	on - 9034	10398 - HFW885 -	Feedba	ck	
Name:	Lee Matthews	a 10/10/2019 6:14	PM	Test Drive - 9033		10398 - 2014 Ford	Quote	Calculate	/1
Home Phone:	+64273782090						Finance Sale Ag	Applicati reement.	ion
Mobile Phone:							Follow- Note	Up	
Email:	Leeptms@hotmail.com						 Outgoir Incomir 	ig Email ig Email	
		Print	Delete			Add -	Outgoir Incomir	ng SMS ng SMS	
					-		S Vehicle	Wanted	

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

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.

Mew Application (D	ealer-led)				-		×
Admin Details	A start		<u></u>	1			_
Dealership:	Auckland	~	Salesperson:	Jaz Kogers			<u> </u>
Customer Details			Lact Name				
Mobile Phone:			Email Address:				
							_
				ОК		Cancel	

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.

Mahiala Information		
venice information		
Does the customer have a vehicle in mind to purchase?		
Yes No		
What type of venicle is your customer interested in?		v
Vehicle ninte number	Stock ID	
	Succe ID	
e.g. A8C123	e.g. ABC123	
	(

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

DIACK		PDUZU	2000 CC	· · · · ·	automatic	90.000 km		Un talu	
M New Applic	Finance Appli	cation - Cust	omer Link				×		\times
Admin Details	Customer Link:	ł	nttps://preview.f	financecentr	al.co.nz/app/b	o1enjrbmenq3			
Dealership								~	
Customer Dated									
Customer Detai									
First Nam									
Mobile Ph								nz	
							-		-
		Ē	Print	Copy to	Clipboard	Close		Cancel	

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

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.

÷	Add activity • 849050	
	Activity type Choose the type of activity you wish to record	
	Test drive	>
\$	Vehicle appraisal	>
	Finance application	>
Q	Vehicle wanted	>
ď	Follow-up/note	>
\simeq	Email	>
	SMS	>
*	Incoming enquiry	>

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.

	Selec	a customer	
	Tip: search fo	mobile number or em	ail
Q	Search		
	Select a customer		
	Tip: search for mobile number or e	nail	
Q, Be	Tip: search for mobile number or e	nail ×	
Q, Be + Ad	Tip: search for mobile number or e cky d'Becky' as a new Customer	nail ×	
Q, Be + Ad Iresults	Tip: search for mobile number or e cky d'Becky' as a new Customer	Sortby: First name +	
Q Be + Ad inesults BB	Tip: search for mobile number or e cky d 'Becky' as a new Customer Becky Bouterey +4 27 000 0000 beckygmotocentral co.nz	Sortby: First name +	

<

Customer



becky@motorcentral.co.nz Edit

Select a different customer

NEXT

Step 4: Enter required sections below.

<

Finance application details

20000	×
Value of trade ins 5000	×
Ennimbranne	
1000	×
Net trade ins	
\$4,000.00	
Deposit on signing 500	×
Davment due on delivery	
0	×
Cash deposits total	
\$500.00	
Amount to finance	
\$15,500,00	

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.



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.



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.



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.





	Finance Application 15791	:
Details Fir	nance Application	
CUSTOMER DETAILS	3	
Referral source		
Customer shan Shannon 0211444444 - Iauren	\$motorcentral.co.nz	SS
Mobile 02114444444		
Email lauren@motorc	Application created Do you want to share the link now?	
RELATED VEHICLE	DONE SHARE LINK	
Vehicle		
849033 • 2019	Nissan Leaf X10 MANDAIKINEN (AK)	

Creating a Finance Central 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.

Financier:	Finance Central \sim	Amount to Finance:	8295.00	<u>6</u>
Term:	Month v at %	Establishment Fees:	NZD 80.00 incl	<u></u>
		Referral Fees:	NZD 295.00 incl	8

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

🚱 New Sale Agreement	
File Accounting	\frown
🛛 🛃 🛛 🔁 VOSA 🕞 🎽 Wholesale Invoice 🍃	More Reports 🗸 🚦 Finance 🗸 🏐 Settings 📓 Workflow 📡 Digital Signing 🖌 💼 Tasks 🗟 Documents
General Vehicles Extras Payments Wri	teback Delivery Custom

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

💰 New Sale Agreement		
File Accounting		
📙 📄 VOSA 👻 Wholesale Invoice 🍃 More Reports 👻	🚦 Finance 🗸 🌐 Settings 📄 Workflow 🕴	🖉 Digital Signing 👻 📄 Tasks 👼 Documents
General Vehicles Extras Payments Writeback Delivery	Finance Central Application	States Dealer-led
Sale Details	Applicant Information	🚨 Customer-led

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
Sub Total	8,295.00 incl
Less Net Trade Ins	0.00 incl
Net Price	8,295.00 incl
Cash Installments	0.00 incl
Amount to Finance	8,295.00 incl
Unallocated	0.00 incl
Payments to Date	0.00 incl
Money Outstanding	8,295.00 incl
Salesperson	Jaz Rogers
Finance Summ	ary
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	Inclusive \checkmark

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
Sub Total	8,295.00 incl
Less Net Trade Ins	0.00 incl
Net Price	8,295.00 incl
Cash Installments	0.00 incl
Amount to Finance	8,295.00 incl
Unallocated	0.00 incl
Payments to Date	0.00 incl
Money Outstanding	8,295.00 incl
Salesperson	Jaz Rogers
	View 🖃
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.



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

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

Print Elinance - A Convert to Sale A Settings			
eral Payme View in Finance Central			Sale Summary
ic Details Applicant Information Date: 23/03/2023 259 pm P Referrat: Dealership: Auckland Salesperson:	 ✓ Activity No laz Rogers ✓ Bus. Manaş 	en	Vehicle: Sold 20,000.00 im Registration 0.00 im Clean Car Fee 0.00 im Vehicle Insurance 0.00 im
Name Home Phone Work Phone Mobile Phone Becky Bouterey 0278292087 027000000	Email Physical City becky@motor Christchurch	Add Customer * Remove Customer	MBI/Warranty 0.00 inc LPI/PPI & GAP Cover 0.00 inc Sale Extras 0.00 inc Sub Total 20.000.00 inc
sicles	Sale Price	Add Vehicle	Less Net Trade Ins 4,000.00 im Net Price 16,000.00 im Cash Installments 500.00 im
B49050 Mazda Mazda6 PTR 2.5P/6AT Vehicle Registration: No Vehicle Registration selected	NZD 20,000.00 incl	Remove Vehicle	Amount to Finance 15,500.00 inc Unallocated 0.00 inc
Clean Car Fee: Clean Car fee does MBI/Warranty: No MBI/Warranty selected	NZD 0.00 incl		Salesperson Jaz Roger
Value of Trade Ins: 5000.00 Encumbrance:	1000.00		
Product Code Description Part Supplier	Category Sale Price	Add Extra	Reference Status Pending Customer Completion
	.0	Remove Extra	
			Display values GST Inclusive
Print	Save	Save & Close Cancel	

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.

7	
Confirm	×
Reason for withdrawal:	A
	v
	OK Cancel

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): .0	0
Display values GST	Inclusive	~





AVANTI | FINANCE



avantifinance.co.nz brandedfinancial.co.nz



dealerteam@avantifinance.co.nz



0800 003 111