

SETTING UP YOUR EQUITY 4 U INTEGRATION.

Key points about this integration:

- Deal must be O or BS, with Monthly payment terms
- You can only enroll customers in E4U once the sale is booked, and only if the enrollment is submitted within 3 days of the sale date.
- If you have multiple locations, you must enroll each location and set up F&I managers separately .

Getting Started

From the main screen, Select **Utilities**, then choose **A. Wayne Reaves Partner Setups**. Under **Third Party Finance Companies**, find **Equity 4 U** and click “Set Up Equity 4 U”.



Once you click "Set Up Equity 4 U", you will need to enter the **Name, Email and Phone Number of the individual who will sign the e4u agreement**. Once you've filled out the information, click **Save**. A pop up will open prompting you to proceed to enrollment. Click **Yes**.

The screenshot shows the Wayne Reaves Auto Dealer Solutions interface. At the top, there is a table of vendors with columns for the vendor name, URL, and a 'Visit Website' button. The 'Equity 4 U' row is highlighted in blue. Below the table are buttons for 'E4U Enroll', 'RouteOne Proxy', 'Help', 'Remove', 'Save', and 'Close'. A warning message states: 'Credentials are often Case Sensitive. Be Sure they match what is provided.' Below this is a disclaimer: 'With this setup you agree for Wayne Reaves Solutions to send all of your accounts to the specified third party vendor. This will not exclude any AR types.' A 'Dealership Contact' form contains fields for First Name (Test), Last Name (Name), Email (test@test.com), and Phone # (1112223333). A 'Proceed To Enrollment' dialog box is open, asking: 'After the dealership is enrolled, you will need to enroll individual users. Would you like to continue to Equity4U's website to complete the dealership enrollment process?' with 'Yes' and 'No' buttons.

AutoZoom	https://autozoom.com/	Visit Website
Automatic	https://www.automaticusa.c...	Visit Website
CAC	http://www.creditacceptance...	Visit Website
CUDL	https://www.cudirect.com/	Visit Website
CarCapital	http://CarCapital.com/	Visit Website
Centrus	http://centrusaf.com/	Visit Website
DealerTrack	https://us.dealertrack.com/	Visit Website
DealerVero	https://live.dealervero.com/l...	Visit Website
Equity 4 U	http://www.equity-4-u.com	Visit Website
F&I Express	https://www.fandiexpress.co...	Visit Website

Buttons: E4U Enroll, RouteOne Proxy, Help, Remove, Save, Close

Credentials are often Case Sensitive. Be Sure they match what is provided.

With this setup you agree for Wayne Reaves Solutions to send all of your accounts to the specified third party vendor. This will not exclude any AR types.

Dealership Contact

First Name: Test

Last Name: Name

Email: test@test.com

Phone #: 1112223333

Proceed To Enrollment

After the dealership is enrolled, you will need to enroll individual users. Would you like to continue to Equity4U's website to complete the dealership enrollment process?

Buttons: Yes, No

Please note: You will need to enter in credentials for the F&I Managers after enrollment.

If you do not wish to proceed to enrollment you can click No. Whenever you are ready to proceed with enrollment you can click "E4U Enroll".

This screenshot is identical to the one above, showing the Wayne Reaves Auto Dealer Solutions interface with the 'Equity 4 U' vendor selected and the 'Proceed To Enrollment' dialog box open. The 'Wayne Reaves Auto Dealer Solutions Support: 800.701.8082' logo is visible at the bottom left.

Once the dealer enrollment page opens, fill out any missing information. The login credentials for the dealership will be sent to the executive contact listed.

Dealership Information:

Dealership
Pineapple Auto Sales

Tax ID # 234 56 7890 Phone Number 777 777 7777

Executive Contact:
First Name Michael Last Name Middlebrooks Email michael@waynereaves.com

Dealer Bank Info (For Commissions Deposit):
Name Routing Number (9 digits)
Bank Account Number Type of Account
 Checking Saving

Dealer/Agent Comments:

F&I Managers ADD

Manager Name	Bank	ABA Routing #	Account #	Type of Account	Email Address	Actions
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ENROLL

In the F&I Managers section, add users who will be submitting deals to Equity 4 U from the DMS.

Click the check mark under the Actions column.

Once all F&I managers have been added, click the "Enroll" button at the bottom of the page. Credentials will be emailed to the addresses entered in this section.

F&I Managers ADD

Manager Name	Bank	ABA Routing #	Account #	Type of Account	Email Address	Actions
michael	some bank	777777777	78694654	<input checked="" type="radio"/> Checking <input type="radio"/> Saving	waynereaves.com	✓

ENROLL

When the Dealer Enrollment contract loads, Enter your name and click the "Sign" button.

F&I Managers					
MANAGER NAME	BANK	ABA ROUTING #	ACCOUNT #	TYPE OF ACCOUNT	EMAIL ADDRESS
michael	some bank	777777777	78694654	Checking	michael@waynereaves.com

By signing below, Client agrees to all terms and conditions, fees, and procedures incorporated in this agreement including those set forth on the terms and conditions on the back side of this page. Client acknowledges information provided is correct and accurate. This agreement is not final until Evolve or its agent has verified all information and accepted you as a Client at Evolve's, or its agent's, sole discretion.

SIGNATURE _____ DATE _____

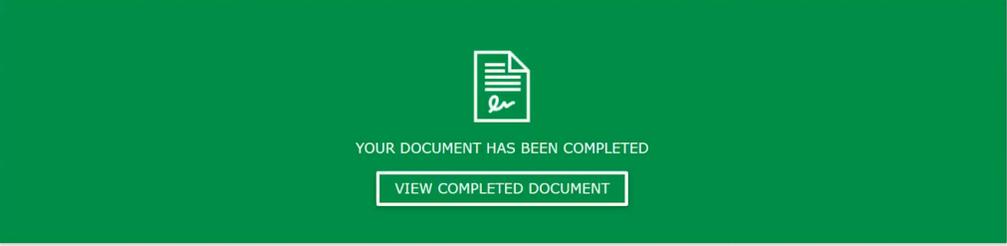


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ORIGINAL COPY

Signature

Once the dealer enrollment has been successfully signed, you will be directed to a page with a message stating that your document has been completed and an email will be sent to the F&I manager with the login credentials.

YOUR DOCUMENT HAS BEEN COMPLETED

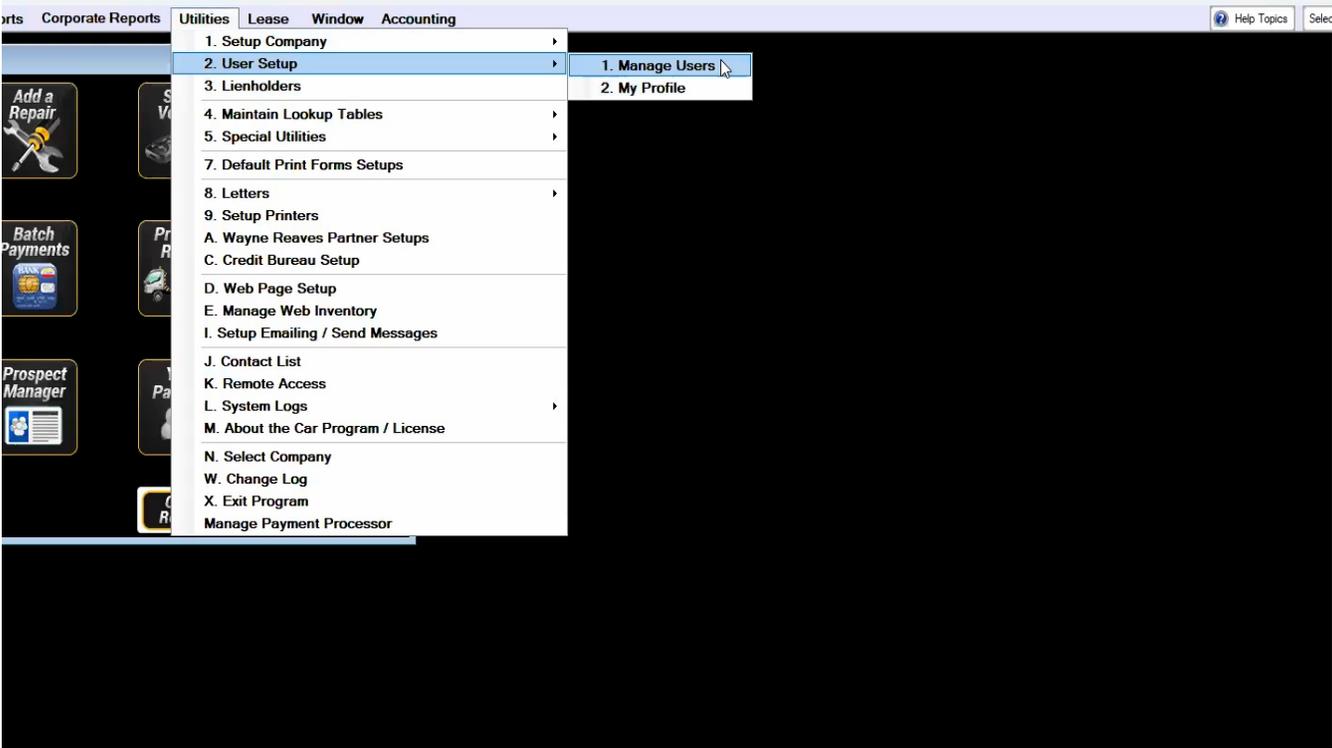
[VIEW COMPLETED DOCUMENT](#)

Thanks a lot,
Equity4U Team.

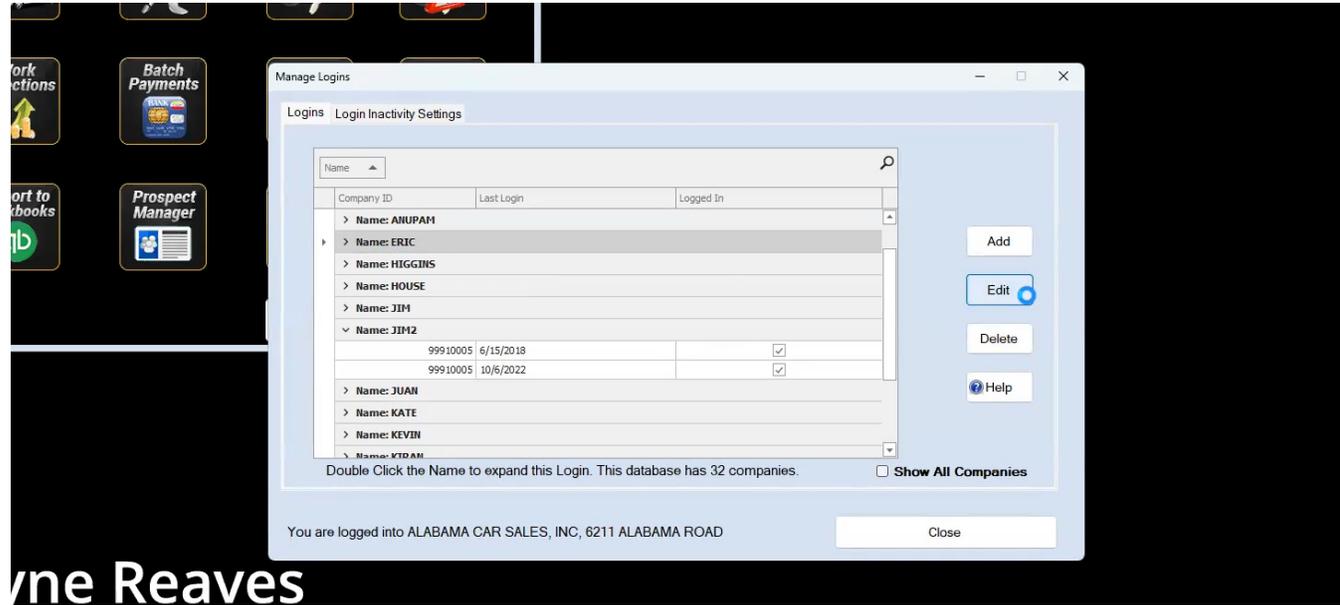
Phone:
(417) 682-2161
Toll Free (866) E4U-LINE or (866) 348-5463

Send e-mail to info@equity-4-u.com
Website equity-4-u.com

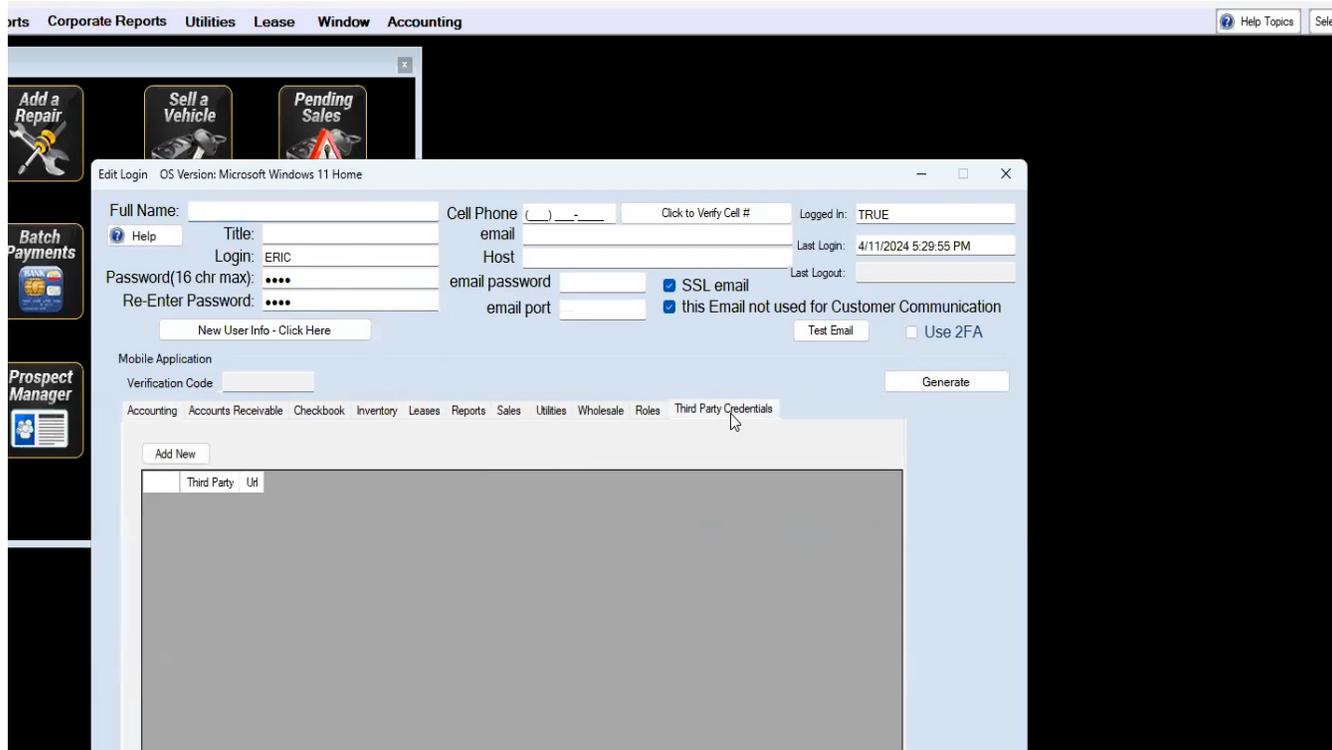
To add F&I Managers, from the main screen, Select **Utilities**, then choose **2. User Setup > Manage Users**. Click **Add/Edit Logins**.



Select the user who you added as an F&I Manager in the Equity 4 U enrollment, and click **Edit**.



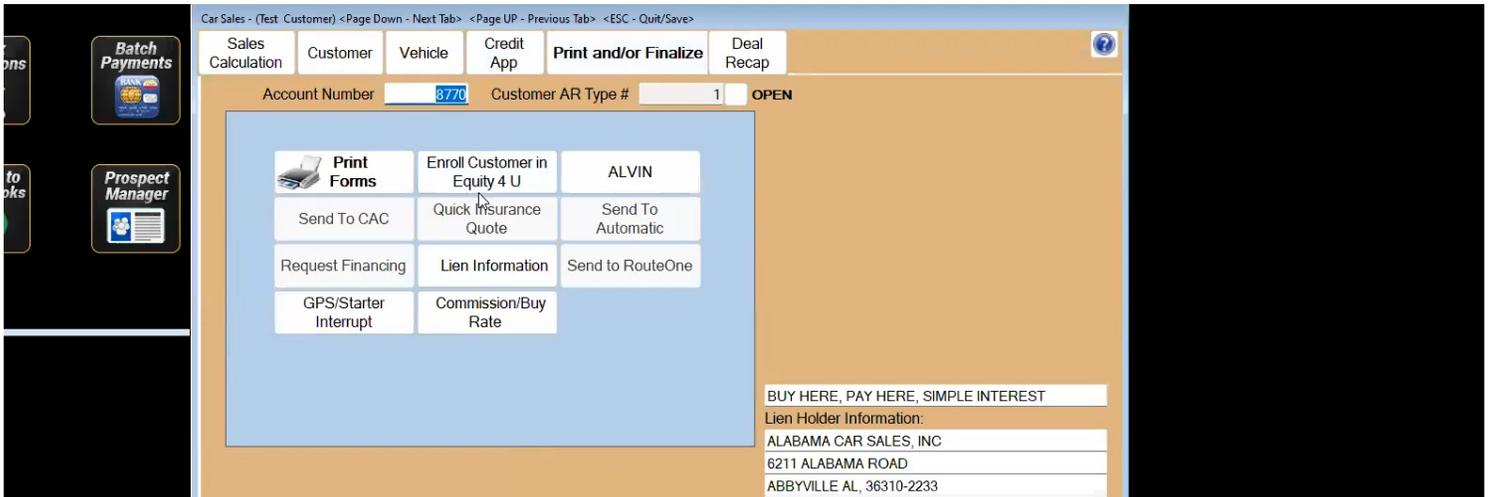
Under **Third Party Credentials**, click **Add New** and select **Equity 4 U** from the drop down list. Enter the F&I login credentials that were emailed. Click **Save**



Customer Enrollment

Open a **Booked Sale** for the customer that you want to enroll in Equity 4 U, and click the **"Enroll Customer in Equity 4 U"** button on the **Print and/or Finalize** tab.

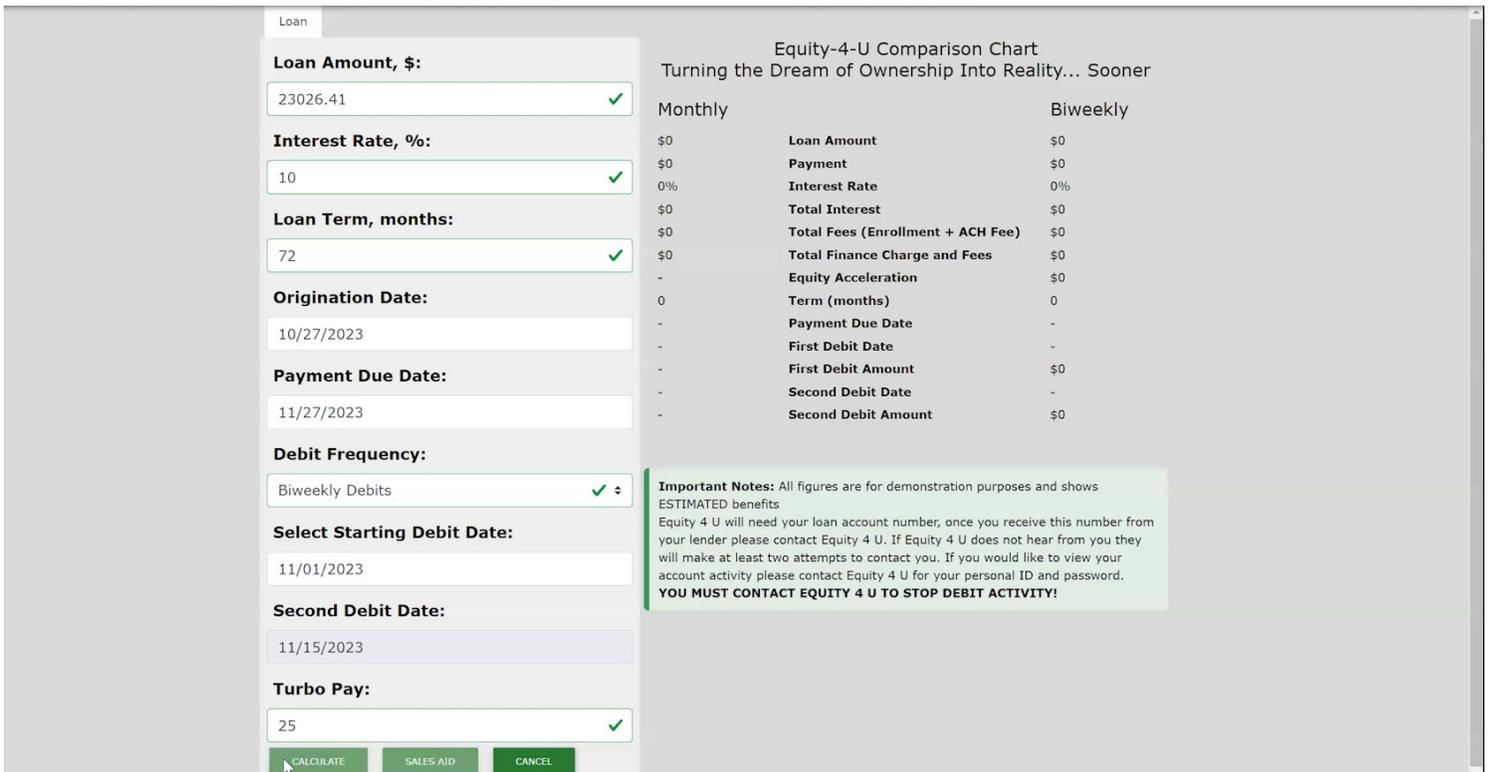
The sale will be submitted using the F&I credentials for the current user.



Equity 4 U will open in a new window and the Equity4U loan calculator should be visible.

Fill in any information that did not auto populate and click the **“Calculate”** button at the bottom of the Loan section.

When the calculations are complete, the Equity 4 U Comparison Chart should show the estimated breakdown for the monthly payment plan vs the breakdown of the loan based on the desired Debit Frequency. Once the estimates are acceptable, click the “Enroll” button.



Fill out all of the required information, and click the “send contract” button at the bottom of the last page. A window will pop up with a form to enter the customer’s email address (If it wasn’t already entered previously) and phone number.

The screenshot shows a web form with three main sections: **Warranty Holder Information**, **Covered Vehicle**, and **Limited Warranty Information**. A modal window is open over the **Covered Vehicle** section, prompting for email and phone details.

First Name	Last Name	MI	Telephone Number
Bob	Bobson		879 746 5512

Address	City	State	Zip Code
123 Tree Lane	Macon	GA	31204

Description	Purchase Date
2018 Honda Accord 1.5L	10/27/20

Vehicle Identification #	Odometer Reading At Warranty Issu
1HGCV1F30JA224548	

Warranty Term	Type of Coverage	Deductible
6 Months or 6,000 Miles	POWERTRAIN	\$250 per repair

Modal Window:

Email: michael@waynereaves.com

Phone: 874 648 6543

Format: 123 456 7890

Buttons: SEND CONTRACT, CANCEL, Send Contract

Once the contract is sent, you should be taken to the confirmation screen. At this point, the customer who is being enrolled will need to open the email from E4U and sign the contract.

