

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.*

	AutoZoom			https://autozo	om.com/	Vi	isit Website									
	A	utomatic		https://www.au	itomaticusa.c	. Vi	isit Website									
	C.	AC		http://www.cre	ditacceptance	Vi	isit Website									
	C	UDL		https://www.cu	idirect.com/	Vi	isit Website									
	CarCapital http://CarCapital.com/			Vi	isit Website											
4	C	Centrus http://centrusaf.com/		Vi	isit Website											
	D	ealerTrack		https://us.dealertrack.com/ https://live.dealervero.com/l		rtrack.com/ Visit Website ervero.com/I Visit Website										
	D	ealerVero														
	E	quity 4 U		http://www.eq	uity-4-u.com	Vi	isit Website									
	F	&I Express		https://www.fa	ndiexpress.co.	Vi	isit Website									
									Pro	oceed To	Enrollment				×	
-			E4U Enroll	Proxy	Help	Remove	Save	Close								
			Enion	Tiony						2 A	fter the dealership	is enrolled,	you will nee	d to enroll to Equity4L	l's	
-		Credentia	ls are oft	en Case Sens	itive. Be Sur	e they				w	vebsite to complete	the dealers	nip enrollme	nt process?		
			match	h what is prov	ded.											
	With this setu	p you agree for Wayne Re	aves Solut	ions to send all	of your accoun	ts to the spec	ified third p	arty vendo	or.	Yes No						
	This will not e	xclude any AR types.														
	Dealership	Contact														
	First Name	Test														
	Last Name	Name														
	Email	test@test.com														
	Phone #	1112223333														
$\overline{\mathbf{x}}$																
				NUU	V U U											

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".

С	UDL	https://www.cuc	lirect.com/	Vis	sit Website						
C	arCapital	http://CarCapita	al.com/	Vis	sit Website						
C	entrus	http://centrusaf.	.com/	Vis	sit Website						
D	ealerTrack	https://us.deale	ertrack.com/	Vis	sit Website						
D	ealerVero	https://live.deal	lervero.com/l	Vis	sit Website						
E	quity 4 U	http://www.equi	http://www.equity-4-u.com								
Fi	&I Express	https://www.fan	https://www.fandiexpress.co								
		E4U RouteOne Enroll Proxy	Help	Remove	Save	Close	Proceed To Enrollment After the dealership is enrolled, you will need to enroll	×			
	Credentials are often Case Sensitive. Be Sure they match what is provided.										
With this setur This will not e	p you agree for Wayne Re xclude any AR types.	aves Solutions to send all of	your accounts	to the speci	fied third pa	rty vendor.	r. Yes No				
Dealership	Contact										
First Name	Test										
Last Name	Name										
Email	test@test.com										
Phone #	1112223333										
	Au	to Dealer Sol	lutions								
		Support: 800 7(11 8082								

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.

Declarable Tofe								
Dealership	mation:							
Pineapple Auto Sale	25							
Tax ID #			Phone Number					
234 56 7890			777 777 77	777 777 7777				
Executive Contact:								
First Name		Last Name		Email				
Michael Middlebrooks				michael@waynereaves.com				
Dealer Bank Info (For C	commissions Deposit):							
Name		3	Routing Number	r (9 digits)				
Bank Account Number			Type of Account	Type of Account				
			○ Checking ○ Saving					
Dealer/Agent Comment	s:							
F&I Managers						ADD		
						_		
Manager Name	Bank	ABA Routing #	Account #	Type of Account	Email Address	Actions		
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.

	Account #	ABA Routing #	Bank	Manager Name
Checking Naynere Saving	78694654	77777777	some bank	michael

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

MANAGER NAME nichael	BANK some bank	ABA ROUTING # 777777777	ACCOUNT # 78694654	TYPE OF ACCOUNT Checking	EMAIL ADDRESS michael@waynerea es.com
y signing below, o	Client agrees to all ter	ms and conditions, fees,	and procedures incorp	orated in this agreemen	t including those set for
greement is not f	inal until Evolve or its	s agent has verified all i	nformation and accept	ed you as a Client at Ev	olve's, or its agent's, s
SIGNATURE				DATE	
		Equity 41			
				1/20	
		© Equity 4 U, Inc. 2011 ORIG	9. All rights reserved. REV 0 SINAL COPY	1/20	
		© Equity 4 U, Inc. 2019 ORIG	9. All rights reserved. REV 0 SINAL COPY	1/20	
		© Equity 4 U, Inc. 201 ORIG	9. All rights reserved. REV 0 SINAL COPY	1/20	
Signature		Equity 4 U, Inc. 2014 ORIG	9. All rights reserved. REV 0 SINAL COPY	1/20	

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.

Equity 4U	
	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.*

ions Payn	ents Mana	age Logins ogins Login Inactivity Setting	js			- 0	
		Name 🔺			م		
Pros	pect	Company ID	Last Login	Logged In			
Man	ager	> Name: ANUPAM					
8		> Name: ERIC					
		> Name: HIGGINS					
		> Name: HOUSE				Edit 🥑	
		> Name: JIM					
		✓ Name: JIM2				Delata	
		99910	0005 6/15/2018			Delete	
		99910	0005 10/6/2022				
		> Name: JUAN				😢 Help	
		> Name: KATE					
		> Name: KEVIN					
					v		

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*

orts Corpo	rate Reports Utilities I	Lease Window	Accounting				🔞 Help Topics Selec
Add a Repair	Sell a Vehicle	Pending Sales				X	
Batch Payments	Full Name: Help Title: Login: Password(16 chr max): Re-Enter Password: New User In Mobile Application	ERIC •••• ••••	Cell Phone (email Host email password email port	Click to Verify Cell # L La SSL email this Email not used	Logged In: T Last Login: 4 Ist Logout: 5 d for Custo Test Email	IRUE	
Prospect Manager	Verification Code Accounting Accounts Rece Add New Third Party Ur	ivable Checkbook Inven	ory Leases Reports Sales Utilities Wholesale	Roles Third Party Gredentials		Generate	

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.

		Car Sales - (Tes	t Customer) <page do<="" th=""><th>wn - Next Tab></th><th><page -="" pres<="" th="" up=""><th></th><th></th><th></th><th></th></page></th></page>	wn - Next Tab>	<page -="" pres<="" th="" up=""><th></th><th></th><th></th><th></th></page>					
ons	Batch Payments	Sales Calculatio	n Customer	Vehicle	Credit App	Print and/or Finalize	De: Rec	al ap	6	9
		A	ccount Number	8770	Custome	er AR Type #	1	OPEN		
to	Prospect Manager		Print Forms	Enroll	Customer in quity 4 U	ALVIN				
)	anager		Send To CAC	Quick	a Insurance Quote	Send To Automatic				
			Request Financ	ing Lier	Information	Send to RouteOne				
			GPS/Starter Interrupt	Com	mission/Buy Rate					
								BU	HERE, PAY HERE, SIMPLE INTEREST	1
								Lien	Holder Information:	
								ALA	BAMA CAR SALES, INC	
								621	1 ALABAMA ROAD	
								ABE	YVILLE AL, 36310-2233	

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.

Loan				
Loan Amount, \$:	Turning the I	Equity-4-U Comparison Chart Dream of Ownership Into Rea	: lity Sooner	
23026.41	 Monthly 		Biweekly	
Interest Rate, %:	\$0	Loan Amount	\$0	
10	✓ \$0 0%	Payment Interest Rate	\$0 0%	
Loan Term, months:	\$0 \$0	Total Interest Total Fees (Enrollment + ACH Fee)	\$0 \$0	
72	\$0	Total Finance Charge and Fees	\$0	
Origination Date:	- 0	Equity Acceleration Term (months)	\$0 0	
10/27/2023		Payment Due Date	1	
Payment Due Date:	-	First Debit Amount Second Debit Date	\$0 -	
11/27/2023		Second Debit Amount	\$0	
Debit Frequency:				
Biweekly Debits	Important Notes: ESTIMATED benefit	All figures are for demonstration purposes	and shows	
Select Starting Debit Date:	Equity 4 U will need your lender please	d your loan account number, once you receiv contact Equity 4 U. If Equity 4 U does not h	ve this number from ear from you they	
11/01/2023	account activity ple	ase contact Equity 4 U for your personal ID	and password.	
Second Debit Date:	YOU MUST CONT	ACT EQUITY 4 U TO STOP DEBIT ACTIVI	TY!	
11/15/2023				
Turbo Pay:				
25	 Image: A second s			
CALCULATE SALES AID CANCEL				

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.

Warranty Holder Infor	mation			
First Name	Last Name	MI		Telephone Number
Bob	Bobson			879 746 5512
Address	City	State		Zip Code
123 Tree Lane	Macon	GA		31204
6				
Covered vehicle		Purchase Da		
		10/27/20	Email	
2018 Honda Accord 1.5L		10/2//20	michael@wayn	ereaves.com
Vehicle Identification #	Odometer I	Reading At Warranty Issu	Phone	
1HGCV1F30JA224548			874 648 6543	
			Format: 123 456 7890	_
Limited Warranty Info	rmation			S
Warranty Term	Type of Cov	verage	Deductible	
6 Months or 6,000 Miles	POWERT	RAIN	\$250 pe	er repair
SEND CONTRANT CANCEL				

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.

info@equity-4-u.com <u>via</u> amazonses.com to andrew →	Tue, Apr 30, 9:45AM (6 days ago)
Thank you for your interest in the Payment Service provided by Equity 4 U. You are receiving this email because your auto dealer notified us that you have requested enrollment in the Equity 4 U payment service for your new	auto loan or lease.
Click below to sign the Equity 4 U Service Agreement.	
[CLICK HERE TO SIGN ELECTRONICALLY]	
We are looking forward to welcoming you to the program, if you have any questions, please feel free to call us via phone or email.	
Thanks, Equity4U Team.	
info@ <mark>equity</mark> -4-u.com	
Toll Free: 866-348-5463	