

How to Enter a Deal

Goto www.line5.com, login in with your email and password. If you forgot your password, click the words forgot password and you will be prompted to reset it.

Step 1

Click "Add A New Customer" – Top Right

Step 2

Fill In The Customer Info

- ✓ Check the box confirming the customer gives you permission to run their credit and a credit application will generate to sign.

Step 3

Select product type, term, mileage and price - click green plus button to add more than one protection.

(NO cap on Financing)

****If Line 5 is integrated with your Provider, you will be asked to fill in the Vehicle Purchase Price, MSRP, Financed Amount and Loan term of the vehicle. Terms & rates will pull directly from your provider.**** Click Next

Step 4 - Calculator Page

If you want to customize the payment, click in the monthly payment box and change the dollar amount then click outside of the box.

A window drops down asking how you want to get to that payment. Select the option and it will recalculate the loan for you. – Your fees will change accordingly. (Lower left box).

Click Submit when satisfied with Finance Term, Interest Rate, Dealer Fees and Monthly Payment.

Step 5 - Overview

Customer Info – Make sure 2 good phone numbers and a good email is filled for the customer. This information will assist our collection department, in event of customer defaults or is late in payment. We try to collect for up to 90 Days.

Protection Info – fill necessary info.

****If Line 5 is integrated with your Provider, you will be asked to fill in the Type of Deal, this is referring to how the vehicle was purchased... Leasing, Loan, Cash, Balloon?.**

If Line 5 is NOT integrated, you need to generate a contract in your service provider's portal or use your paper contracts, have the customer sign and send in with Line 5 loan packet

Payment Info –Choose payment method. ACH- free, Debit Card- \$3.99 convenience fee- Select a payment date.

Click submit

Step 6 - What's Next Click

Print Documents.

Have The Customer and Dealer Sign All Documents

- Customer Initial Bottom Right Corner of Line 5 Installment Contract Page 1, 2, and 3.
- **CUSTOMER AND DEALER EACH SIGN TWICE ON PAGE 3**
- Customer and Dealer sign the coverage contracts
- **If not integrated, print the contracts from the provider's portal or use your paper contracts and send them in with the LINE 5 loan packet for funding**

Step 7 – Upload, Email or Fax Documents For Funding (Line 5 Funds Within 48 Hours – Make Sure Deal is Complete)

- Cover Sheet With The Bar Code – Always Use As Top Page – **ONLY SEND ONE DEAL AT A TIME**
- Line 5 Installment Contract
- Signed Coverage Contracts
- **Upload, Fax: 239-330-1437 or Email: documents@line5.com**

*****Please note: If you are using the Provider Portal to Generate Contracts – LINE 5 MUST BE THE LIEN HOLDER*****