

# User Guide For **Application Entry**

- ✓ Entering a Credit Application
- ✓ Notifications
- ✓ Support

The logo for Clickserv, featuring the word "clickserv" in a bold, lowercase, sans-serif font. A horizontal line is positioned below the letters "i", "c", "k", and "s". A small "SM" trademark symbol is located to the right of the word. The logo is centered within a light blue circular background that is partially overlaid by a dark teal shape at the bottom of the page.

**clickserv**<sup>SM</sup>

## User Guide – Application Entry

### Purpose:

The purpose of this document is to provide guidance for logging in and entering an application on the external ClickServ portal.

### Content:

- [Entering a Credit Application](#)
- [Notifications](#)
- [Support](#)

### Other Key Links

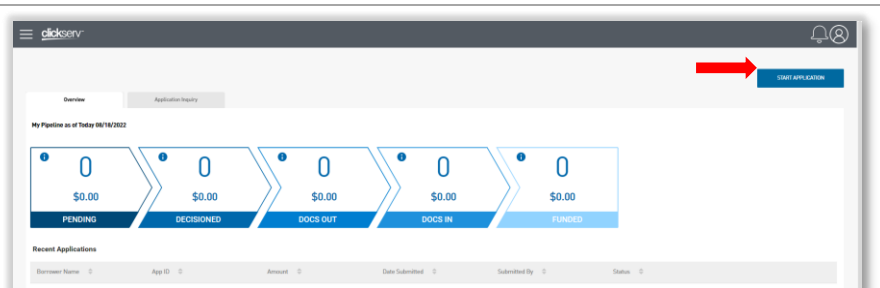
- [Logging in to ClickServ](#)
- [Application Inquiry](#)

**Log In URL** [Vendor Finance Portal \(clickservonline.com\)](https://clickservonline.com)



### Entering an Application

To begin an application click on the “Start Application” hyperlink on the top right of the Pipeline screen.



## User Guide – Application Entry

- Once you click on Start Application, a new window will appear.
  - Enter your Partner (dealer) name, if not already populated.
  - After entering your dealer name, the Program field will automatically be completed with “CI JCB Flow Business”
  - Finally, select “Self” if you are entering this application with your name, or “Other” if you have the permission to enter an application on behalf of another rep at your dealership

After you enter these 3 items, the “Start Application” button will be highlighted, click this button to proceed

### There are 4 steps to complete the application:

- Borrower Information
- Personal Guarantor Information
- Equipment and Pricing
- Additional Information (if needed)

**NOTE:** Please **click on continue** to move to the next section, **and to ensure your work is saved** before navigating to a prior screen.

**NOTE:** When moving from one section to the next, please click “Continue” at the bottom of the page. If you click back, or use the left navigation bar before clicking “Continue”, you will receive this notice. If you click “Yes, Continue” the information that you have added will not be saved. To save the information, click on “No, return to Page”. This will allow you to return to the page and continue to add information.

**Borrower Information**

Please complete all sections

- Primary Business Information
- Primary Business Address (PO BOX is not a valid address, and should not be entered)
- Primary Business Contact
- Whether this application will be leased or rented to a 3<sup>rd</sup> party, please check the applicable response.
- First Time Buyer – please check the appropriate response.

Once all required fields are completed, the “Continue Button” will be highlighted. Please click this button to proceed to the Personal Guarantor Information.

NOTE: if the business type selected is a “Sole Proprietorship, you will be required to complete the Personal Guarantor information; if not you can bypass this information. (see next screen)

The screenshot shows the 'Borrower Information' form. On the left sidebar, 'Deal Application' is circled in red. The main form contains sections for 'Primary Business Information', 'Primary Business Address', and 'Primary Business Contact'. At the bottom, there are two radio buttons for 'Is the equipment associated with this application intended to be leased or rented to a 3rd party?' (Yes/No) and 'Is this a first time buyer?' (Yes/No). A red arrow points to the 'CONTINUE' button.

**Personal Guarantor Information**

For a Sole Proprietorship (or for other related credit requirements), please provide the required information including the SSN of the guarantor, since their personal credit history will be part of the credit review for this application.

NOTE: For business types other than Sole Proprietorship, the Continue button will be highlighted without entering information. You may still be asked to enter this information, if so required by your Regional Finance Manager.

The screenshot shows the 'Personal Guarantor Information' form. At the top, it states: 'By providing the information below, each individual listed intends to be a personal guarantor for the credit transaction and authorizes the bank to use the information, including the information provided below.' The 'Personal Guarantor Information' section has a checkbox for 'Same as Primary Business Contact' which is circled in red. Below this are fields for First Name, Middle Name (optional), Last Name, Date of Birth, SSN, and Percent Ownership. The 'Home Address' section has a checkbox for 'Same as Primary Business Address' and fields for Country, Street Address, City, State, and Zip Code. At the bottom, there are 'BACK', 'CONTINUE', and 'SAVE AND EXIT' buttons.

### Equipment and Pricing

Please enter whether this will be a lease or a loan, and the requested term. [If this is a lease, you will be required to specify the “End of Lease Option”

To enter a term, please click on the term filed, and enter the desired term in the text box.

In this example, we are looking for a 60 month Loan for an Agriculture-Skid Steer Loader for \$75,000. You will choose the “Equipment Type”, as well as the “Model”- 300W from a drop-down menu. NOTE: the “Description” filed is now optional.

The JCB Finance doc fee is defaulted to \$500, if your dealership raises this amount, please overwrite the \$500. Please do not Add Cost to increase the Financed Doc Fee.

A new option is now available, “Financed Buy Out”. To select this option, click on the “Select Cost Type” and select “Financed Buy Out”. You can now enter the amount in the corresponding cell. This amount will then be included in the “Additional Costs” line as part of “Total Amount Requested”.

In this example there is no “Down Payment” if this had been selected, the amount will show in the “Total Amount Requested” section.

When you have completed the required fields, the “Continue Button” will be highlighted, click on this to move to the next section.

**NOTE:** if you are entering an attachment, or a non-JCB used equipment to this app; enter the full amount to be financed (JCB equipment +). In the Additional Information section, put in a comment regarding the cost of the JCB equipment and list the attachment/used other equipment description and the related cost.

The screenshot displays the 'Equipment and Pricing' section of the Clickserv application. The interface is divided into a sidebar and a main content area. The sidebar contains navigation links: Deal Application, Borrower Information, Personal Guarantor Information, Equipment and Pricing (highlighted), Additional Information, and Review and Submit. The main content area is titled 'Equipment and Pricing' and includes the following sections:

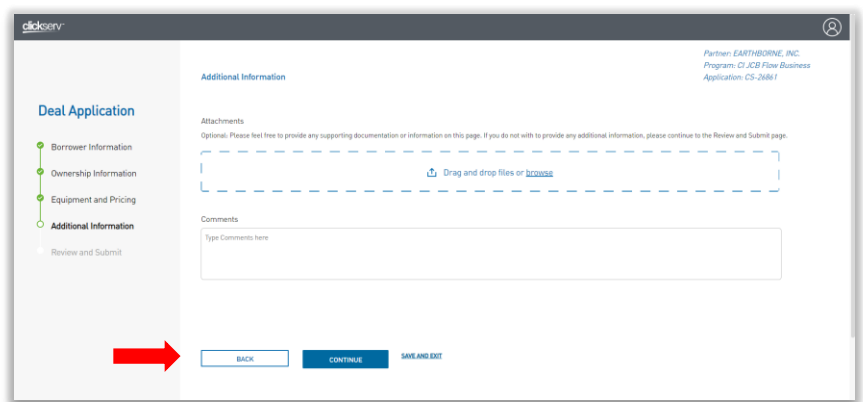
- Deal Type:** Will this deal type be a loan or a lease? (Loan selected, Lease unselected). Term (Months): 60. Term (Months) is required.
- Equipment Information:**
  - Equipment Type: Agriculture-Skid Steer Loader
  - Model: Skid Steer Loader Model 300W
  - Manufacturer: JCB
  - Condition: New (selected), Used (unselected)
  - Description: (Optional)
  - Year: 2022
  - Equipment Price: \$75,000
  - Quantity: 1
  - Serial Number (Optional):
- Additional Costs (optional):**
  - Financed Doc Fee: \$501
  - Financed Buy Out: (Optional)
- Down Payment (optional):** (Optional)
- Total Amount Requested:**
  - Equipment Costs: \$75,000.00
  - Additional Costs: + \$501.00
  - Down Payment: - \$0.00
  - Total Amount Requested: = \$75,501.00

At the bottom of the form, there are three buttons: BACK, CONTINUE (highlighted in grey), and SAVE AND EXIT. A red arrow points to the CONTINUE button.

### Additional Information

This section is optional, if you choose to provide additional information you can do so by dragging and dropping a file in the top box, or by Typing in your comments in the box below.

Click on the “Continue” button to go to the next section.



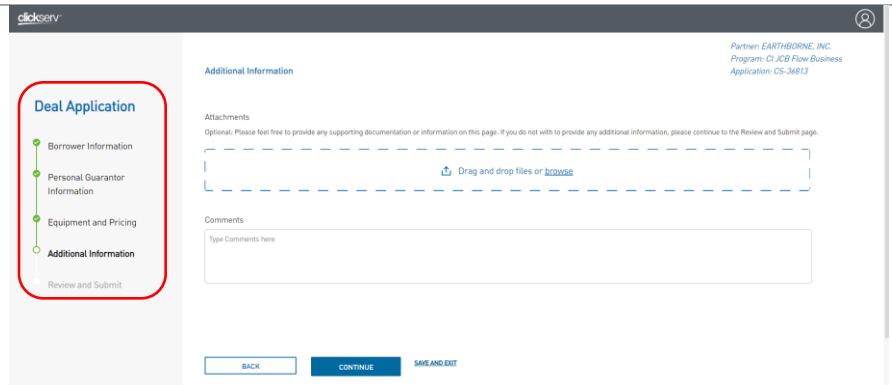
### Review and Submit

In this last step you can review a summary of the application to submit. You can click on the:

- Ownership Information,
- Equipment and Pricing, and
- Additional information to view what you have entered.

If you need to update any of this information, click on the corresponding breadcrumb to the left of your screen to return to that section.

NOTE: please scroll through and read the “Terms and Conditions” at the bottom of your screen, then check “I have read and accept all the terms and conditions listed above.” After doing so, the “SUBMIT” button will be highlighted.





## Credit Notifications

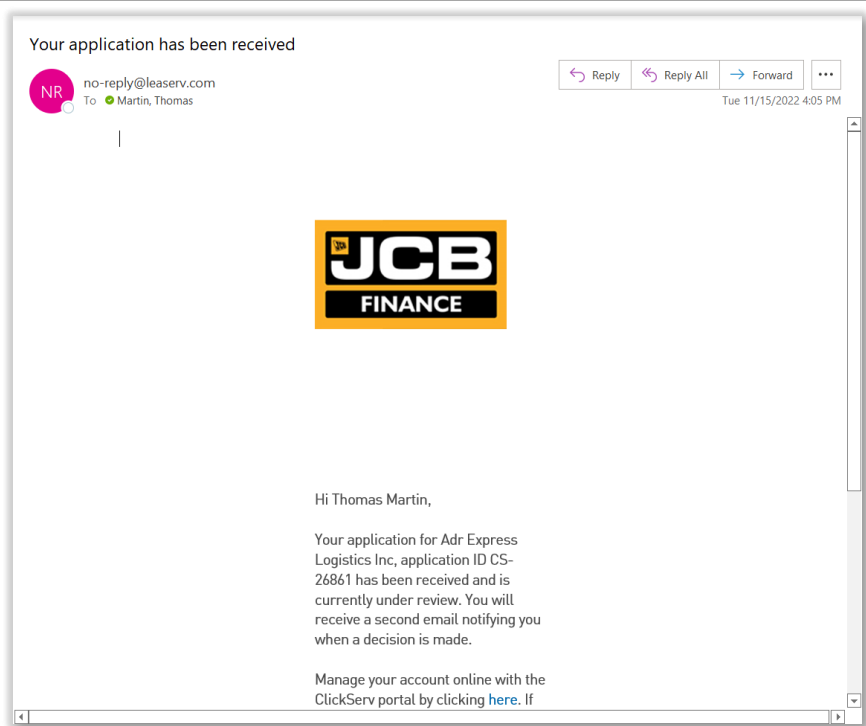
Once you submit your application, a process bar will appear. If your application was NOT automatically approved, you will receive the screen Notification “We have received your application, but it requires credit review. We will notify you when a decision is made.”

You will receive an email with similar notification (see next page to view the example)

The screenshot shows the 'Deal Application' interface. At the top right, it identifies the partner as EARTHORNE, INC., the program as CI JCB Flow Business, and the application as CS-2681. A red-bordered notification box states: "We have received your application, but it requires credit review. We will notify you when a decision is made." Below this, there are sections for Primary Business Information, Ownership Information, Equipment and Pricing Information, and Additional Information, each with a dropdown arrow. A 'History' table is also present, showing application status updates.

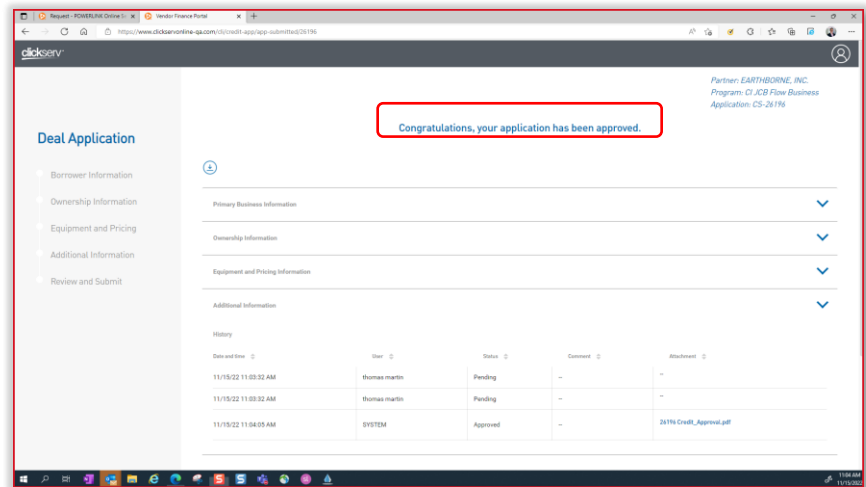
Date and Time	User	Status	Comment	Attachment
11/15/22 04:05:01 PM	thomas martin	Pending	-	-
11/15/22 04:05:01 PM	thomas martin	Pending	-	-
11/15/22 04:05:40 PM	SYSTEM	Pending	-	-

Sample email if your application requires further credit review.

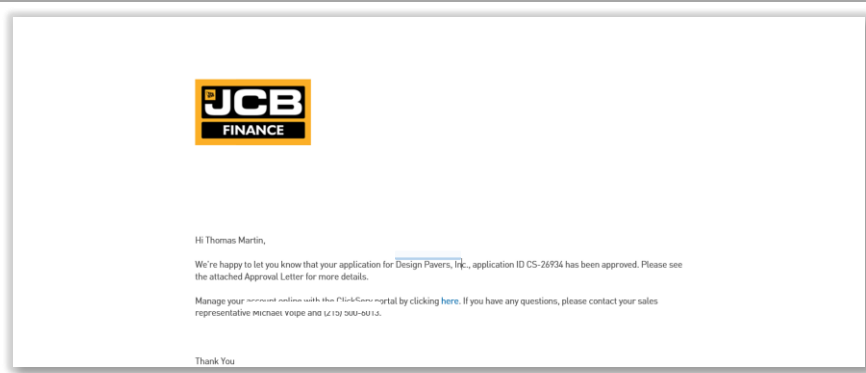


In this example, your application was auto-approved and you will see the onscreen notice “Congratulations, your application has been approved.”

See next page for sample email



Upon the approval of your credit application, you will receive an email – see example.







**Support:**

For additional support, please contact your JCB Finance Manager, or Tom Martin @ 610-909-0146