

QuickScreen Batch



QuickScreen Batch

- Enables dealers to manually upload a customer file into their 700Dealer.com account
- The prescreen batch is processed overnight which allows for **LOWER PRICE POINTS**
- Results are available the next day and can be viewed in the applicant list in 700Dealer.com or downloaded via the reporting tool
- All prescreen certificates can either be emailed or printed locally by the dealer.
 - Those not delivered by those channels will be mailed from the 700Credit mail house automatically.



QuickScreen Batch

QS Batch can be used:

- In the service lane to Prescreen customers before their appointment to identify vehicles ready for a trade, facing a high service bill or to lower the current interest rate
- In the BDC to run a batch prescreen on inbound leads
- Run batch prescreens on your sales database to remarket to customers who didn't purchase, or haven't purchased for a while
- Run batch prescreens on purchased sales leads before you reach out to the prospect



Upload a File

Applicant List

- Applicant List
- Mailhouse Queue
- Upload Sold Autos
- Upload Applicants for Letters
- QuickBatch Upload**

QuickBatch Upload

Select QuickBatch File: No file chosen

*File must be of type .csv

Select Dealer:

For a sample file, click the link here [csv_file_blank](#)
File can be filled and uploaded

QuickBatch Upload History

File Number	User Name	Dealer Name	File Name	Processed Date	Applicants Count	Status
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Files will need to be converted to .CSV format before they can be loaded into 700Dealer. For an example of a CSV file, click on the link in the window above.

- Log in to 700Dealer.com
- Navigate to the APPLICANT LIST menu item on the left-hand menu bar
- Select the QuickBatch Upload
- Select the file name to upload
- If you have more than one rooftop, select the dealer name
- Click on “Upload QuickBatch”



Sample File

Applicant List

QuickBatch Upload

Select QuickBatch File: No file chosen

*File must be of type .csv

Select Dealer:

For a sample file, click the link here [.csv](#) [blank](#)
File can be filled and uploaded

QuickBatch Upload History

File Number	User Name	Dealer Name	File Name	Processed Date	Applicants Count	Status
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AutoSave OFF

QuickBatchUploadSample (1)

File Home Insert Page Layout Formulas Data Review View Help

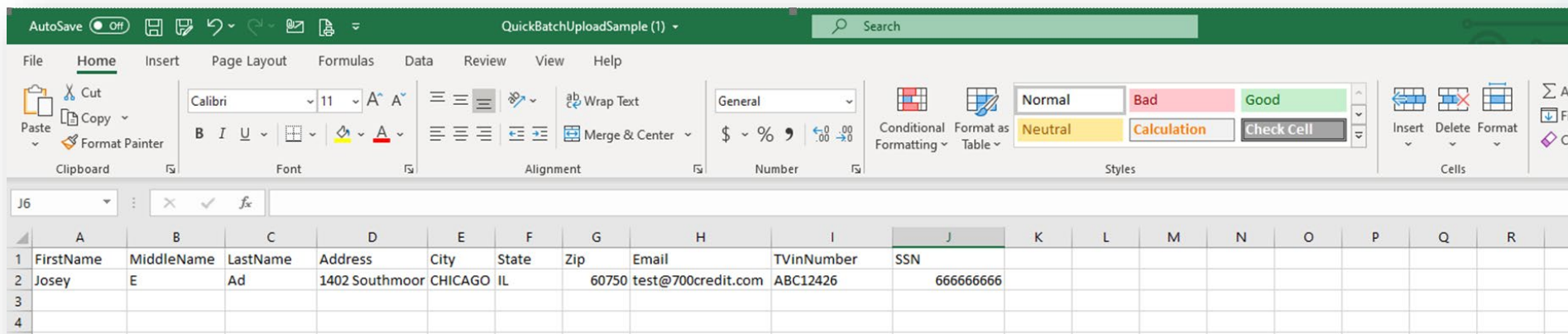
Clipboard Font Alignment Number Styles Cells

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
1	FirstName	MiddleName	LastName	Address	City	State	Zip	Email	TVinNumber	SSN									
2	Josey	E	Ad	1402 Southmoor	CHICAGO	IL	60750	test@700credit.com	ABC12426	666666666									
3																			
4																			



Additional Product Points

- Email address field, if added to upload file, email is automatically sent to consumer if they pass the set criteria, and firm offer of credit letters are NOT mailed
- VIN, if VIN Number is uploaded, we will do a VIN match and indicate which trade matches the VIN for Payoff Amount, Monthly Payment and Months remaining.
- If Social Security Number is passed, match rate is raised to 88%
- Decisioning is not just min score, you can set target score ranges, if looking for sub prime customers. 650-700



The screenshot shows the Microsoft Excel interface with a data table. The ribbon is set to 'Home' and the 'Styles' group is expanded, showing conditional formatting options like 'Normal', 'Bad', 'Good', 'Neutral', 'Calculation', and 'Check Cell'. The data table has the following content:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
1	FirstName	MiddleName	LastName	Address	City	State	Zip	Email	TVinNumber	SSN									
2	Josey	E	Ad	1402 Southmoor	CHICAGO	IL	60750	test@700credit.com	ABC12426	666666666									
3																			
4																			

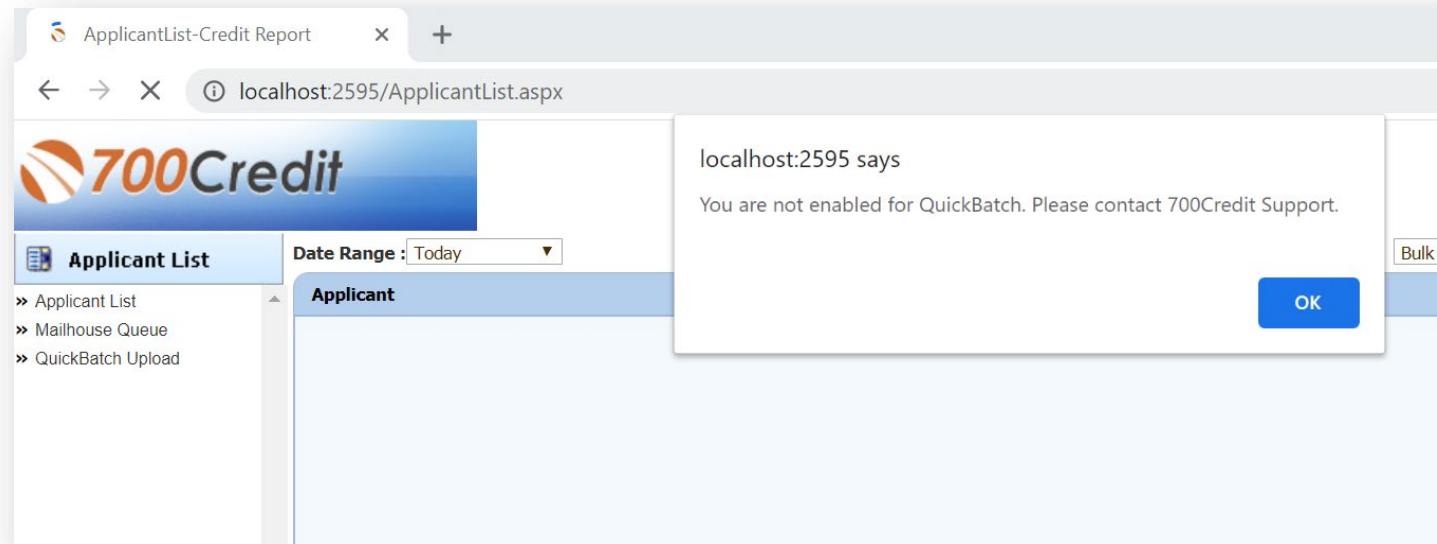


Access Requirements

IF the dealer's Data Access (DAS) has QuickBatch enabled, Web Users (limited to AA, DA, DU User Levels) will have the ability to upload a .CSV file on the **QuickBatch Upload** screen.

IF the dealer's DAS **DOES NOT** have QuickBatch set up with the minimum requirements above **AND** a User tries to upload a file to the **QuickBatch Upload** page, we will display a pop-up with the error message:

You are not enabled for QuickBatch. Please contact 700Credit Support.

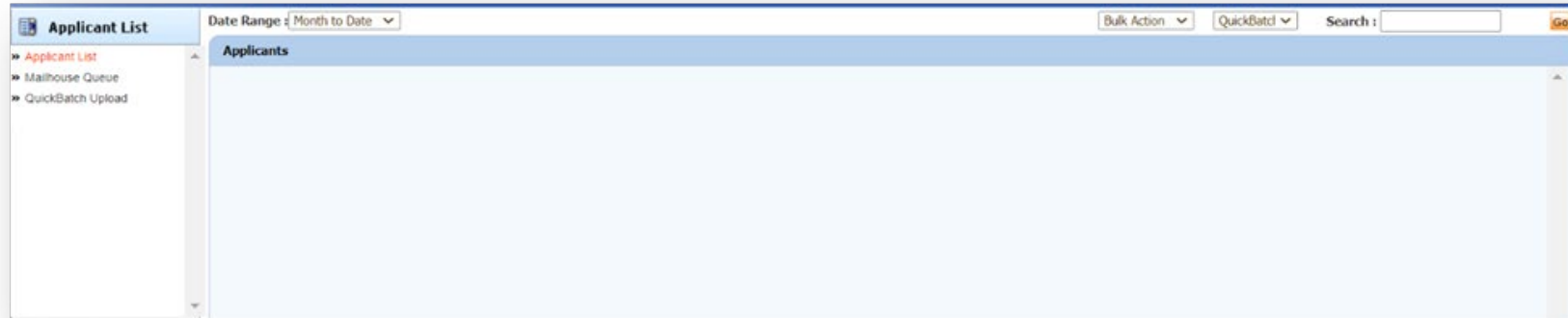


Key Product Points

- Once the file is uploaded, the QS Batch Scheduler will process all applicants overnight. All applicant results will be available the morning **FOLLOWING** the upload.
- Users who are set up with permissions to view all QuickScreen applicants (via User Level Settings) will be able to view the QS Batch results in the Applicant List.
- All Certificates (if applicable) will be mailed from the 700Credit mail house unless printed or emailed locally by the Dealer (Per usual).
- If email address provided in upload, all applicants will receive an email.
- In Applicant List, **all QS Batch applicants will be written as QuickScreen applicants**, with the Username of the uploader as the “User” who processed the request.
- Applicants can be filtered using the existing App List filter for QuickBatch.



Viewing Applicant Results



- There are 2 locations in 700Dealer.com where dealers can view their QS Batch results:
 - Standard Applicant List
 - New QS Auto Trade Summary Report in Usage Analysis section in 700Dealer.com
- Standard Applicant List:
 - QS Batch applicants can be viewed in your 700Dealer.com portal within 24 hours of uploading your list.
 - Click on your Applicant List menu item – applicants will be labeled with the standard QS notation with the Username of the uploader as the “User” who processed the request.
 - To view JUST your QS Batch results, you can use the sort filter “Quickscreen Batch”



Viewing Applicant Results

- We have added a new report to the Usage Analysis section of 700Dealer for QuickScreen and QS Batch so you can see in one table all of your QS results. To view the report:
 - ✓ Select **Usage Analysis** in the left menu structure
 - ✓ Select the **QS Auto Trade Summary** report
 - ✓ The new report will return applicant data including score, scorecard, available revolving credit, auto inquiries, as well as all Auto Trade data shown on the QS results.
 - ✓ The data can also be downloaded by selecting the Excel icon.

The screenshot displays the 'Usage Analysis' section of the 700Credit application. The left sidebar contains a menu with 'Usage Analysis' selected, and 'QS Auto Trade Summary' highlighted in red. The main content area is titled 'Quick Screen Tread Report' and includes filters for 'Select Dealer' (ALL), 'Date Range' (Previous Month), 'From' (05/01/2020), and 'To' (05/31/2020). Below the filters is a table with 10 columns: Dealer Name, Applicant Name, Result, Score, Bureau, Scorecard, Inquiry Date, Avail Revolving Credit, Auto Inquiries, and Auto Trade 1. The table contains four rows of data for Casa Nissan.

Dealer Name	Applicant Name	Result	Score	Bureau	Scorecard	Inquiry Date	Avail Revolving Credit	Auto Inquiries	Auto Trade 1
Casa Nissan	Janis Hicks	PASS		TransUnion	FICO Auto 08	5/31/2020 7:57:22 AM	\$17,161.00	0	
Casa Nissan	Veronica Salazar	PASS		TransUnion	FICO Auto 08	5/30/2020 8:36:13 PM	\$471.00	0	
Casa Nissan	Caroline Navarro	PASS		TransUnion	FICO Auto 08	5/30/2020 12:22:18 PM	\$42,598.00	0	
Casa Nissan	Rosamaria Sanchez	PASS		TransUnion	FICO Auto 08	5/30/2020 11:50:18 AM	0.00	0	



QuickScreen Results - Sample

- A prescreen returns the following data to the user:
 - Live FICO Score
 - Indicates current credit situation
 - What kind of payment they might qualify for
 - Summary of Auto Trade Lines Including:
 - Current Monthly Payment
 - Current Auto Loan Interest Rate
 - Remaining Balance / Payoff
- Full file not available

QUICKSCREEN CERTIFICATE

QuickScreen Results


Result: Consumer Passed Quick Screen Criteria **Score:** 727 (Tier 1)
 Powered by TU: FICO Auto 08

Consumer Information:


Name: Mariella Aarden
 Address: 2 berard
 Westport, MA 02790

Auto Summary:

Available Revolving Credit: \$3,881.00 Auto Inquiries last 30 days: 0

Auto Trade Line 1 


Interest Rate: 6.47%	Original Amount: \$12,886.00	Original Terms: 60 Months	No of Late Payments: 0	Monthly Payment \$252.00
Percent Paid: 100%	Estimated Payoff: \$0.00	Remaining Terms: 0 Months	Joint: NO	
Loan Type: Auto Loan		Trade Status: Closed	Trade Open Date: 11/11/2012	

Auto Trade Line 2 

Interest Rate: 4.66%	Original Amount: \$16,045.00	Original Terms: 61 Months	No of Late Payments: 0	Monthly Payment \$296.00
Percent Paid: 100%	Estimated Payoff: \$0.00	Remaining Terms: 0 Months	Joint: NO	
Loan Type: Auto Loan		Trade Status: Closed	Trade Open Date: 07/31/2011	

Certificate Status:

Printed By: N/A
 Confirmed By: N/A



Thank You

