AutoFi

For Sales Consultants | Quick Guide

Customer Walk-In Flow
Using AutoFi

A simple path to start the conversation, build the deal with the customer, and keep the experience moving.

START HERE • Customers Page → Prospects

1 Find or Add the Customer
Search for an existing prospect or applicant or select Add Prospect for a new walk-in.
Customers Page → Prospects

2 Check In
Open the customer, use the Shortcuts icon, and check them in. They will then appear in Showroom.
Shortcuts → Check-In

3 Open the Deal
Use the Drive Card as the main customer collaboration space. Confirm or select the vehicle and choose Finance, Lease, or Cash.
Customer → Drive Card

4 Get the Basics Right
Add the customer address so taxes and fees calculate accurately. Explore payments, terms, down payment, rebates, and alternate vehicles as needed.
Drive Card

5 Understand Buying Power
With explicit customer consent, run a Soft Pull. Use the result to guide the conversation and vehicle/payment options.
Drive Card → Soft Pull

6 Complete the Deal Inputs
Add trade information or request payoff when applicable. Present available protection products and review pricing details.
Trade / Protect / Pricing Details

7 Move to Credit
When the customer is ready, continue into the credit application. Partner with them to complete required information and disclosures.
Pricing Details → Continue

8 Keep the Customer Moving
After submission, follow the on-screen status and lender outcome. Share the in-progress deal by text/email when useful.
Offers / Shared Buying Experience

BEST PRACTICE
Use the customer's needs to determine the order and keep the Drive Card as your home base.

