

## Appendix J CUDL

The CUDL integration allows you to transfer deal information for CUDL credit union members to the CUDL Website. You will then log in to the CUDL Website and enter any additional information and submit the credit application.

### CUDL Integration Setup Verification

Autosoft's Customer Support Center will set up the integration between your FLEX DMS F&I account and CUDL to allow you to transfer deal information to CUDL. **You do not need to take any steps to set up the integration.** You can, however, verify that the integration has been established. To verify the account, follow these steps:

1. Click the **Admin** link in the top right corner of the screen above the blue navigation bar.
2. In the blue navigation bar, click **Integrations**.
3. From the Integrations list in the left navigation panel, click **CUDL**.
4. Click the **Transactions** tab and verify that the **CUDL Deal Transfer** box is checked.

If the CUDL Deal Transfer box is not checked, contact a FLEX DMS F&I support representative in the Autosoft Customer Support Center for assistance.



The screenshot shows a web interface with three tabs: 'History', 'Transactions', and 'Setup'. The 'Transactions' tab is active. Below the tabs, there is a section labeled 'CUDL Deal Transfer' with a checked checkbox. A 'Save' button is located in the bottom right corner of the form area.

5. Click the **Setup** tab.
6. Verify that your dealership's CUDL ID is entered in the **ID** field.

If the ID field is blank, contact a FLEX DMS F&I support representative in the Autosoft Customer Support Center for assistance.



The screenshot shows the same web interface as the previous screenshot, but now the 'Setup' tab is active. The 'ID' field is populated with the value '999999'. A 'Save' button is located in the bottom right corner of the form area.

## Submitting Deal Information

Once Autosoft's Customer Support Center has established the integration between your FLEX DMS F&I account and CUDL, you will use the **Integrations** link on the deal menu to transfer the deal information. This process simply transfers the deal information to CUDL. You must log in to the CUDL Website to complete and submit the application.

1. Create a deal.
2. Click **Integrations** in the left navigation panel.
3. Select **CUDL** from the **Integrations Organization** drop-down menu.
4. Select **CUDL Deal Transfer** from the **Transactions** drop-down menu.

The screenshot shows a web browser window with a navigation menu on the left. The main content area has two dropdown menus: 'Integration Organization' and 'Transactions'. The 'Integration Organization' dropdown is currently set to 'CUDL', and the 'Transactions' dropdown is set to 'CUDL Deal Transfer'. The browser tab is labeled 'Wilkerson' and the page title is 'Retail - Finance - 011615'.

5. In the **Deal Transfer** section, click **Send**.
6. You will see a Success message when the information has been sent, and the status will be "Sent" followed by the time stamp for the transfer.

The screenshot shows the same web browser window as the previous one, but now with more content. The 'Deal Information' section is expanded, showing the following details:
 

Applicant	Thomas Wilkerson	Vehicle	2015 Chevrolet Silverado
Address	123 Main St.	VIN	65406540654CDFVC
City	W MIDDLESEX	Stock Number	
State	Pennsylvania		
ZIP	16159		

 Below this, the 'Deal Transfer' section is visible, featuring a 'Send' button and a status message: 'Status: Sent - 01/11/2016 04:23 PM Eastern Standard Time by Elissa Toto'.

7. If the information contains errors, the status will read, "Rejected," followed by the time stamp for the transfer, and the program will display an error message identifying the information that must be corrected. Correct the information and send the deal again.
8. Click the URL on the screen to go to the log-in page of the CUDL Website. You will need to review the deal information and add any additional information required. The credit application is not complete until you finish submitting it through CUDL's Website.

## Reviewing the CUDL Transaction Log

Users with administrative rights (those who can access the system setup) can review the CUDL transaction log. This allows you to review which deals were successfully transmitted and which deals did not go through. You can submit deals from the log as needed.

1. Click the **Admin** link at the top right corner of the screen, above the blue navigation bar.
2. Click the **Integrations** tab in the blue navigation bar.



3. From the **Integrations** list in the left navigation panel, click **CUDL**.
4. The **History** tab displays all the open deals.
5. The **Sent Date** column identifies the date the deal was sent. The column displays “Not Sent” for deals that haven’t been submitted or “Rejected” for deals that CUDL did not accept.

History Transactions Setup							
Transactions: CUDL Deal Transfer							
Start Purchase Date		01/01/2016		End Purchase Date		01/13/2016	
<input type="checkbox"/> Show Only Unsent <input type="button" value="Filter"/>							
Deal #	Stock #	Customer	Address	Vehicle Information	VIN	Sent Date	User
<a href="#">11540</a>	95730N	Jones, Samuel	1234 Ridge Rd NW, NILES, TN 60290	2015 Nissan ROGUE SL	5N1AT2MV7FC898600	01/02/2016	Toto
<a href="#">11665</a>		Wilson, Mike	5236 Wilson Drive, CORTLAND, OH 44410	2015 Chevrolet Silverado	65406540654CDFCVC	01/02/2016	Anthony
<a href="#">11667</a>	2223	Bowers, William	283 Brower Lane, NEW CASTLE, PA 16101	2015 Chevrolet Tahoe	1GNSKBK08FR504604	Not Sent	
<a href="#">11684</a>	42817A	ARAUJO, PHILIPPE	111 Main Rd, ORLANDO, FL 32824	2008 DODGE DAKOTA ST	1D7HE2K16S689208	01/12/2016	Harvey
<a href="#">11694</a>	DAS1	Smith, Adam	1600 Pennsylvania Avenue, DAYTON, OH 45405	2009 MERCEDES-BENZ E3504M	WDBUF87X59B427966	Rejected	Anthony

View 1 - 5 of 21

6. You can filter the list using the **Start Purchase Date** and **End Purchase Date** fields.
7. To view only the deals that have not been sent to CUDL, click to select the **Show Only Unsent** box and click **Filter**.

8. Click a deal in the list to view a summary of the deal information below the list.
9. You can click **Send** in the **Deal Transfer** section to submit unsent deals right from this screen.

History
Transactions
Setup

Transactions: CUDL Deal Transfer Start Purchase Date: 01/01/2016 End Purchase Date: 01/13/2016

Show Only Unsent Filter

Deal #	Stock #	Customer	Address	Vehicle Information	VIN	Sent Date	User
<a href="#">11540</a>	95730N	Jones, Samuel	1234 Ridge Rd NW, NILES, TN 60290	2015 Nissan ROGUE SL	5N1AT2M77FC898600	01/02/2016	Toto
<a href="#">11665</a>		Wilson, Mike	5236 Wilson Drive, CORTLAND, OH 44410	2015 Chevrolet Silverado	65406540654CDFCVC	01/02/2016	Anthony
<a href="#">11667</a>	2223	Bowers, William	263 Brower Lane, NEW CASTLE, PA 16101	2015 Chevrolet Tahoe	1GNSKBK6FR504604	Not Sent	
<a href="#">11684</a>	42817A	ARAUJO, PHILIPPE	111 Main Rd, ORLANDO, FL 32824	2006 DODGE DAKOTA ST	1D7HE2K16S688208	01/12/2016	Harvey
<a href="#">11694</a>	DAS1	Smith, Adam	1600 Pennsylvania Avenue, DAYTON, OH 45405	2009 MERCEDES-BENZ E3504M	WDBUF87X59B427966	Rejected	Anthony

Page 1 of 5 View 1 - 5 of 21

**Credit Union Direct Lender Information**

Url: <http://www.cudl.com/>

**Deal Information**

Applicant: William Bowers	Vehicle: 2015 Chevrolet Tahoe
Address: 263 Brower Lane	VIN: 1GNSKBK6FR504604
City: NEW CASTLE	Stock Number: 2223
State: Pennsylvania	
ZIP: 16101	

**Deal Transfer**

Send Status: Not Sent