

# Pinnacle Auto Finance Dealer Portal – Design Mock Ups

Landing page for Portal with default view “Login” selected.

The landing page features a background image of a car showroom with several sports cars on display. The Pinnacle Credit Services logo is in the top left. A central text block describes the benefits of joining the dealer network. On the left, two bullet points highlight 'Better Rates' and 'Simple Process'. On the right, a login/register form is displayed with the 'Login' tab selected.

**PINNACLE CREDIT SERVICES**

Access better financing options for your clients by joining our dealer network. Submit and manage vehicle finance deals through our streamlined platform.

- Better Rates**  
Access competitive financing options
- Simple Process**  
Streamlined deal submission and management

**Login** Register

Username

Password

Forgot Password? **Login**

Landing page for Portal in register view “Register” tab selected.

The landing page is identical to the previous one, but the 'Register' tab is selected in the form. The form is titled 'Dealer Registration' and includes a description of the benefits. It contains fields for Username, First Name, Last Name, E-mail Address, Password, and Confirm Password. A 'Register' button is at the bottom, followed by a link for existing users.

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Login **Register**

**Dealer Registration**  
Access better financing options for your clients.

**Username**

**First Name**

**Last Name**

**E-mail Address**


**Password**


**Confirm Password**

**Register**

Already have an account? [Login](#)


DEALER PIPELINE VIEW WITH EDIT DEALER PROFILE CLOSED








Account Manager


Contact Information

 E-Mail Address : [jeanrodriguezdelas@gmail.com](mailto:jeanrodriguezdelas@gmail.com)

 Phone No : (786) 731-8492

 Address : Miami, Florida

 Office address : 3448 Washington Street, Sloughdon,MAC2072



4/15/2023

Underwriting


Document Review

NEG12345

97824

3 messages

Need proof of insurance before final approval. Please submit by Friday



4/15/2023

Pending Docs


Follow Up

4NA012678

97825

2 messages

Client submitted paystubs. Still waiting on bank statements for last 3 months.



2/25/2023

Credit Check


Submit Lender

NLL45678

97826

1 message

Lender requesting additional credit references to underwrite application.



3/3/2023

Conditions


Income Verification

N0231456

978275

2 messages

Income verification incomplete. W-2 from 2022 missing employer signature.



3/3/2023

Pending Docs


Follow Up

W158901

97826

4 messages

Second reminder sent for vehicle inspection report. No response yet.



3/10/2023

Approved


Schedule Closing

NF123456

97829

3 messages

Closing scheduled for Tuesday at 2pm. All documents prepared and ready.



3/23/2023

Underwriting


Document Review

N0856789

97830

2 messages

Underwriting flagged DTI ratio concerns. Need to discuss options with your client.



4/8/2023

Conditionally


Income Verification

NL324567

97831

3 messages

Conditional approval granted. Pending proof of residence for last 12 months.



3/29/2023

Underwriting

Document Review


NH901234


97833

4 messages

Dealer called requesting status update. Informed application is still in review.


DEALER PIPELINE VIEW WITH EDIT DEALER PROFILE OPEN








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Dealership Legal Name


(Must match dealer license)



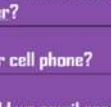
Address/City/State/Zip




Federal Tax ID (SSN if Sole Prop)



Owner Full Name (List All Owners)



Owner Date of Birth (List All Owners)



Owner SSN (Required for OFAC - All)



Owner Residence Address (List All)



Dealership Phone #



Fax #



Dealer License #



Whom do we Contact with an approval or counter offer?



What is their cell phone?



Where should we email approvals?



SAVE

DEAL VIEW OPENS WHEN INDIVIDAL CLIENT NAME OR MESSAGES LINKS ARE CLICKED

Customer & Deal Information

Applicant		Co-Applciant
Name:	Testco, Hazel	--
Address:	77 Palace Ct	--
	--	--
(H) (336) 856-6631	--	--
(M) --	--	--
	--	--
SSN:	555385250	--
Residence:	5 yrs. 4 mon.	--
Employment:	5 yrs. 0 mon.	--
Ann. Income:	\$60,000.00	--

CONVERSATIONS HISTORY

Timeline

Search timeline

Enter a note...

SA

Conversation from System Administrator  
Sidney Higa (sample): Live chat workstream  
Active  
6/14/2021 11:27 AM

SA

Conversation from System Administrator  
Sidney Higa (sample): Live chat workstream  
Closed  
6/14/2021 11:27 AM

Auto-post on Sidney Higa (sample)  
Contact: Created By System Administrator.  
4/1/2021 3:03 PM

Click Down arrow to expand message to access read and reply.

DEAL STATUS

Deal Submitted

Conditional Approval

Final Approval

Documents Ready

Original Docs Q/C Review

Deal Funded

Deal Information

USED 2019 Honda Civic Sedan

Collateral Type: Auto

Invoice: --

Selling Price: \$20,000.00

Sales Tax: \$500.00

TT&L: \$500.00

Other: \$0.00

Program Routing Override: No

Program: --

Preselect: --

Program: --

Mileage: 20000

Net Trade: --

Rebate: --

Total Down: \$1,000.00

Requested: \$20,000.00

Term: 60

Wsale Value: \$19,500.00

VIN# 1FHD376J12K137987

List

Price

Down

Trade

Payoff

Rebate

APR

Term

Tax

Tax Group

AMOS/Opt

Insurance

Accessories

Serv Cont

Fee\$/Lender

Sale Date

Deliver

First Payment

Lender

Discount

Fell free to improve upon these designs and layout if you are able to.