

Credit Requests in Dealer Portal

Credit Requests Overview

TrueCar Dealers subscribed to the Pay Per Sale billing model now have the ability to submit credit requests through the Dealer Portal. For information regarding credit requests, review the Pay Per Sale Credit Policy or request one from your TrueCar Representative.

Before You Submit a Credit Request:

- You must have permission for 'Accounting' in Dealer Portal (Your Dealer Admin or TrueCar Representative can grant this permission)
- Only the user who submits a credit request will receive an email notification of approved/denied
- Submissions will be processed in the order in which they are received

Credit Request Process

From the Dealer Portal, navigate to the **'Invoices'** section by hovering over the menu option in the upper right corner of the page. You can search by Invoice #, Lead ID or VIN to locate the approved sale. Once you've identified the Approved Sale, click on the **'Lead ID'**. By selecting the 'Lead ID', you will be taken to the Prospect Details for the customer.

The screenshot shows the Dealer Portal interface. On the left, the 'Invoices' link is highlighted in the navigation menu. On the right, the 'Approved Sales' section displays a table of sales data. The table has columns for Lead ID, VIN, New/Used, Lead Date, Sale Date, and Approved Date. The first six rows of the table are highlighted with a red box.

Lead ID	VIN	New/Used	Lead Date	Sale Date	Approved Date
1087979520	JTHBP1BL9GA000535	Used	8/31/2021	9/3/2021	9/30/2021
1088812695	WMWLN5C5XK2G82265	Used	9/15/2021	9/18/2021	9/27/2021
1088910311	1FTEW1EG4FFC53876	Used	9/17/2021	9/17/2021	9/27/2021
1088886147	3MW5R1J02M8C21995	New	9/16/2021	9/18/2021	9/27/2021
1088379766	SUXTR9C53JLC79203	Used	9/6/2021	9/13/2021	9/20/2021
1088644510	WBXJG7C04M5S23660	New	9/12/2021	9/11/2021	9/20/2021

1. Under the customer contact information in the Prospects tab, select **'Request Credit'** then click the 'Continue to Request Credit' button after reviewing the details of the Pay-Per-Sale Credit Policy. If a credit request has already been submitted, this will read "Credit Pending".
2. After selecting the 'Request Credit' link, choose a reason for your credit request, before selecting 'Next: Supporting Documents'.

The screenshot shows the Prospect Details page for Bob Jones. The page displays the customer's name, vehicle information (2022 MITSUBISHI OUTLANDER), VIN (JA4J3UA88NZ025250), and dates (Sold: 09/05/2021, Approved: 09/22/2021). The 'Request Credit' button is highlighted with a red box.

Bob Jones
 2022 MITSUBISHI OUTLANDER
 VIN: JA4J3UA88NZ025250
 Sold: 09/05/2021
 Approved: 09/22/2021

Affinity Partner
 U.S. News

Invoice: 1001034891
Request Credit

- Credit Requests require supporting documentation (Screenshots, Receipts, etc.) before submission. You can attach multiple documents, up to 10 MB size files. For quickest resolution, provide additional comments in your request, but this section is optional.

Supporting Documents (required)

- Maximum upload file size: 10 MB

1. [DisputeSupport.JPG](#) 



- Once the credit request form is complete, select the **'Submit Credit Request'** button. You can review the details of your request one more time before you click 'Submit'. This final step will submit your request for approval.

One-Time Submission: Keep in mind, you are unable to edit a request once it's submitted. Please double-check your submission details before you submit to ensure a quick resolution for your request.

[Submit Credit Request](#)

- After the request is submitted successfully, you can check the customer details in the 'Prospects' tab to see the 'Request Credit' link has been replaced with **'Credit Pending'** and a 'View Credit Request' link is available to view the details of the request.

The user who submits the request via Dealer Portal will receive an email notification for approval/denial once the request has been reviewed.

Reminder: If a credit request has recently been submitted, the 'Request Credit' link will be replaced with 'Credit Pending'. You can only submit one credit request for each matched sale.

Bob Jones

2022 MITSUBISHI OUTLANDER

VIN: JA4J3UA88NZ025250

Sold: 09/05/2021

Approved: 09/22/2021

Affinity Partner

U.S. News

Invoice: 1001034891

Credit Pending

[View Credit Request](#)

Credit Status Overview

After submitting a request for credit through the Dealer Portal, you will see a Credit Status column in the 'Invoices' section of Dealer Portal. If the Credit Status is blank, a credit request has not been submitted.

Credit Status
Credit Pending
Credit Approved
Credit Denied

- Credit Pending** – A credit request has been submitted and the request will be reviewed for approval/denial
- Credit Approved** – The credit request has been reviewed and approved for partial or whole credit
- Credit Denied** – The credit request has been reviewed and denied

Additional Support

If you need assistance submitting credit requests in the Dealer Portal, contact your TrueCar Representative or contact us at (866) 480-1313 or email dealersupport@truecar.com