



**PORTAL INSTRUCTIONAL GUIDE**

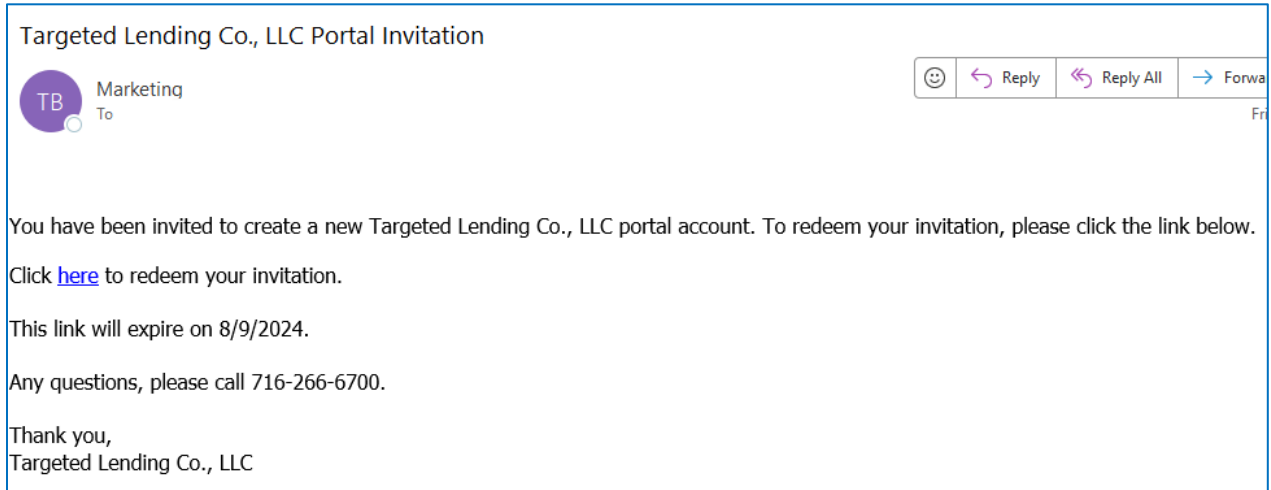
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# REGISTRATION

## Accessing the Broker Portal

To gain access, you will be sent an invitation. If you have not received an invitation, reach out to the team at Targeted Lending.



Simply follow the invitation link to register. **Do not check I have an existing account** and click **Register**.

The registration form is titled "Sign up with an invitation code". It features a large text input field for the invitation code, a checkbox labeled "I have an existing account", and a prominent orange "REGISTER" button.

You will be prompted to enter your email, a username, and a password. Fill out these fields and, again, click **Register**. Now you have access to submit new credit applications, view deal statuses, and request loan documentation for deals.

# APPLICATIONS

## Submitting a New Application

One of the core features of the broker portal is submitting borrower applications. After signing into the portal:

⇒ **Navigate to NEW APPLICATION.**



You will be taken to a multi-step form that will capture all the required information about your application.

**NOTE:** Each step of the form may contain fields that are required or not required, but the more information you provide, the better TLC will be able to service your request.

The steps are as follows:

1. Broker Information, Borrower Details and Credit Write-up.
  - a. *Contact Name & Email Address* fields are required.
  - b. *Owners*: your selection in this field will determine the subsequent number of times you must provide information about an owner.
  - c. *Credit Write-up*: The more information and files provided upfront, the quicker the application process will be.

**Click NEXT to proceed in the application process.**

## Broker Information

Contact Name \*

Email Address \*

## Borrower Details

Legal Company Name

Tax ID

DBA

Type of Business

In Business Since

Website

Business Phone

Street 1

City

Street 2

State/Province

Country

Postal/ZIP Code

# Owners \*

## Credit write-up.

Provide a description of the business and use of collateral, as well as any additional notes or comments

Attach any related files, such as: Credit Bureau report, invoice, bank statements, etc. 

No file chosen

2. Owners' Information

a. If you chose more than 1 owner, you would fill this section out that many times.

Please capture the required information and click 'Next' to continue the process of submitting an application

**1st Owner**

First Name

Last Name

Address Line 1

Address Line 2

City

State/Province

ZIP/Postal Code

Country

SSN

Percentage of Ownership

Country


Ever filed for Bankruptcy  
 No  Yes

Open Lien or Judgment?  
 No  Yes

Credit Release Obtained  
 No  Yes

- b. For each owner: If **Ever filed for Bankruptcy** = yes, you will need to provide the Date of Bankruptcy:

Ever filed for Bankruptcy  
 No  Yes

Date of Bankruptcy  
M/D/YYYY 


**Click NEXT to proceed in the application process.**

3. Equipment Information:


- a. Provide all information relevant to the equipment to be financed.

Please capture the required information and click 'Next' to continue the process of submitting an application

**Equipment**

Approximate Equipment Cost	Age of Equipment (years)
<input type="text"/>	<input type="text"/>
Equipment Description	Equipment will be located at
<input type="text"/>	Select 

If **Different Address** is chosen for where the equipment will be located, you will be prompted to provide that here:


Equipment Description	Equipment will be located at
<input type="text"/>	Different Address 

**Equipment Address Information**

Address Line 1

Address Line 2

City

State/Province (Equipment)  
 

Postal/ZIP Code

**Click NEXT to proceed in the application process.**

#### 4. Vendor Information

Please capture the required information and click 'Next' to continue the process of submitting an application

**Vendor**

Vendor Name	Vendor Contact Name
<input type="text"/>	<input type="text"/>
Vendor Website	Contact Phone Number
<input type="text"/>	<input type="text" value="Provide a telephone number"/>
Contact Email	
<input type="text"/>	

**Address Information**

Street Address 1	Street Address 2
<input type="text"/>	<input type="text"/>
City	State/Province
<input type="text"/>	<input type="text" value=""/>
Postal/ZIP	
<input type="text"/>	

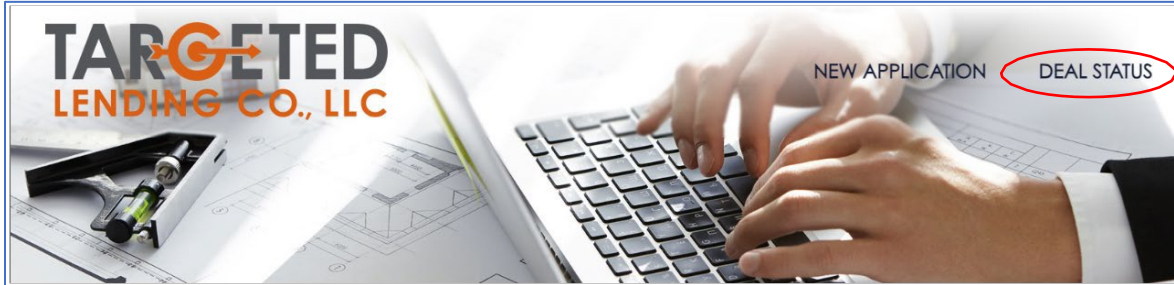
**After adding all vendor information, SUBMIT the form, and the application process is complete.**



# DEALS

## Managing Deals

⇒ **Navigate to DEAL STATUS**



In Deal Status, you will see your Deals and a variety of details based on the status of your deal.

1. Switch Views

- a. All Open Deals – shows all deals with a status of 'Open'.
- b. App Received – shows all deals in the 'App Received' stage.
- c. Credit Approved – shows all deals in the 'Credit Approved' stage, having a credit decision with 'Approved' status.
- d. Doc Prep – shows all deals in the 'Doc Prep' stage.
- e. Docs Sent – shows all deals in the 'Docs Sent' stage.
- f. Docs Received – shows all deals in the 'Doc Received' stage.
- g. Vendor Funded, Commission Released – shows all deals that have been funded.
- h. Declined Deals – shows all deals with a status of 'Credit Declined.'
- i. Complete Deal History – shows all deals with any status.

2. View details

- Clicking either the 'App received date' or the button on the right to navigate to a detailed summary of the deal.

3. Search

- Search your deals by any of the available columns.

### Deal Status

1. All Open Deals -

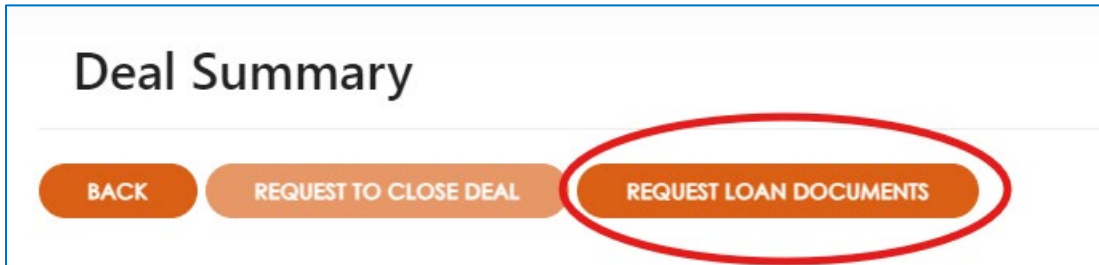
3. Search

App Received Date ↓	Broker Contact	Customer	Contract Number	Finance Amount	Stage Name ↑	Current Owner
2. 12/15/2023	Keaton Brewster	SYNACT, Inc.	136399	\$500.00	Credit Approved	2. <input type="button" value="a"/>

From the details page of any deal:

⇒ **Select REQUEST LOAN DOCUMENTS**

**NOTE:** To request documents for a deal, it must have received a Credit Approval and be in the Credit Approved status.

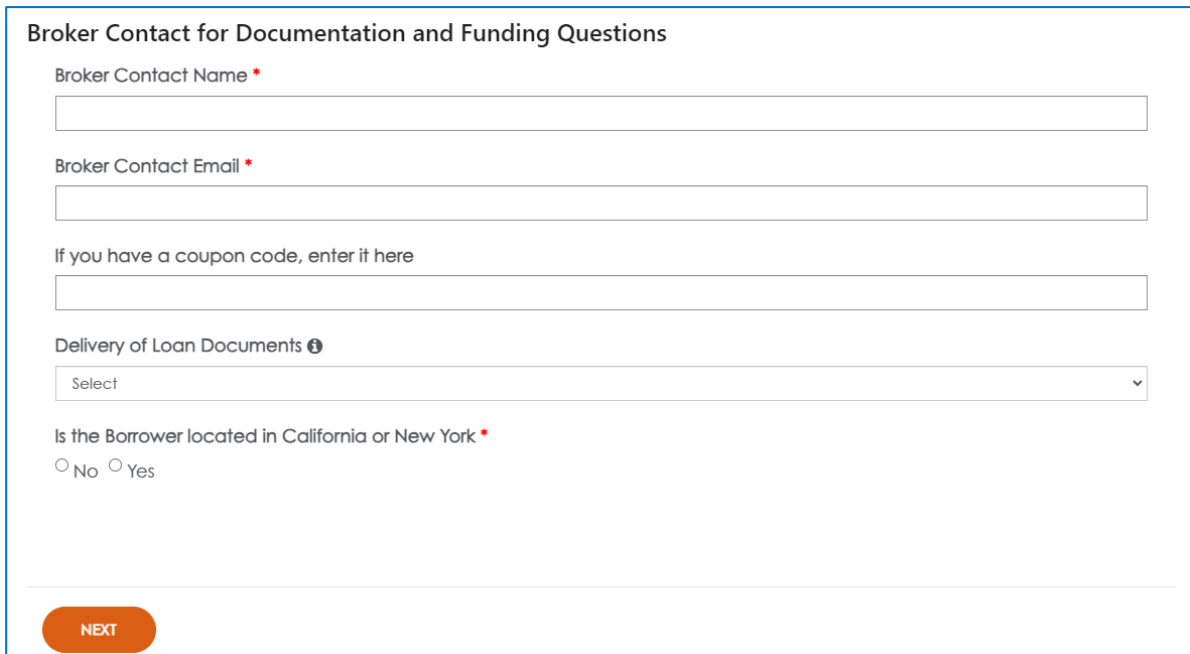


You will be taken to a multiple step form to submit all the required information to receive loan documentation/title quote.

**NOTE:** There are a variety of required fields in the subsequent steps, and you will be prevented from proceeding until they have been filled.

The steps are as follows:

1. Broker Contact for Documentation and Funding Questions

A screenshot of a form titled "Broker Contact for Documentation and Funding Questions". The form contains the following fields:

- Broker Contact Name \* (text input)
- Broker Contact Email \* (text input)
- If you have a coupon code, enter it here (text input)
- Delivery of Loan Documents ⓘ (dropdown menu with "Select" selected)
- Is the Borrower located in California or New York \* (radio buttons for "No" and "Yes")

At the bottom of the form is a red "NEXT" button.

**Click NEXT to proceed in the Document Request process.**

## 2. Equipment Questions and Title Quote Information (if applicable)

### Equipment Questions and Cost

Equipment Description ⓘ

Is any of the Equipment Titled? ⓘ \*

No  Yes

Who will be handling the titling? ⓘ

Vendor  Targeted Lending Co. LLC

What are you requesting?

Select ▼

### Title Quote Information

To obtain a title quote please answer the following questions and PROVIDE A COPY OF BOTH THE FRONT AND BACK OF THE TITLE.

Select a Title Quote Option (Copy of Title required) ⓘ

Select ▼

A notarized Power of Attorney (POA) from the Borrower is required for all titled transactions to accurately complete the title transfer and registration. Targeted offers an electronic notary service to facilitate a more seamless closing process. If requested, a \$50.00 fee will be added to the documentation fee for this service ⓘ

Please send out a print and sign notary POA

Please prepare an electronic notary POA

Cell Number for eNotary Details

Provide a telephone number

Will the Tax and Title Fees charged by the DMV be financed in the loan or paid upfront? ⓘ \*

Select ▼

Is the Borrower Tax Exempt?

No  Yes

Please upload a copy of the customers tax exempt certificate

[CHOOSE FILE](#) No file selected

### The address the Vehicle(s) will be titled at?

Title Address Line 1	Title Address Line 2
<input type="text"/>	<input type="text"/>
Title Address City	Title Address State/Province
<input type="text"/>	<input type="text"/>
	Title Address Postal/Zip Code
	<input type="text"/>

How many vehicles are being titled? ⓘ

1 ▼

### Vehicle 1 Information

VIN \*

Year \*

Make & Model \*

Purchase Price \*

Milage \*

Gross Weight (lbs)

Please upload a copy of the front and back of the vehicles Title \*

No file selected

**Click NEXT to proceed in the Document Request process.**

### 3. Vendor Instructions, Additional Documents, and Personal Guarantor Information

### Vendor Invoices and Payment Instructions

Does any Vendor need prefunding?  
 No  Yes

No. of Vendors

Vendor 1 or Private Party Seller

Vendor 1 Contact

Vendor 1 Email Address

Vendor 1 Invoice or Bill of Sale  
 No file selected

Vendor 1 Wire or ACH information  
 No file selected

### Additional Documents and Uploads

Please use the corresponding folders to Upload Drivers Licenses for all PGs, as well as any additional files

Name	Modified
Additional Files	8/2/2024 10:52 AM
Drivers Licenses	8/2/2024 10:52 AM

Voided Business Check

No file selected

Please add any additional notes or questions you may have.

### Personal Guarantors

How many Personal Guarantors are there for this transaction?

Select ▼

1st PG (primary signee)

PG 1 Full Name

PG 1 Title

PG 1 Email Address

[PREVIOUS](#) [NEXT](#)

**Click NEXT to proceed in the Document Request process.**

- If the Document Request is for *titled collateral* and requested *TLC titling* and a *Title Quote only* you will see the below message and require clicking Submit to submit the Title Quote Request. If not, continue with the remainder of this guide.

You have requested Title Quote Only. Please submit the form now and we will contact you for the rest of the information once we receive the title quote.

[PREVIOUS](#) [SUBMIT](#)

- Loan Terms, Commission Information, and Fee Information

**NOTE:** The commission calculator includes required fields and must be calculated to submit the form.

### Commission Calculator

Pick Your Program

Brokering  Discounting

Advance Structure

Waive Interim Fees

Include an Early Payoff Addendum

Requested Points

Equipment Cost

Term in Months

Enter Approved Rate

[CLICK TO ACTIVATE PICK YOUR OWN PRICING](#)

[CALCULATE](#)

Click 'calculate' to see updated results.

## Fees

TLC automatically charges the fees detailed on your approval and any additional applicable fees including:

- \$300.00 Documentation Fee (inclusive of all prefunds, wires, and ACH's)
- \$200.00 Site Inspection Fee
- \$400.00 Private Party Fee (inclusive of all sites and UCC searches)
- \$100.00 Redoc Fee
- \$100.00 per Corporate Guarantee
- \$50.00 Electronic Notary

Will you be adding additional loan fees to the fees charged by Targeted? \*

No  Yes

Will you be paying fees on behalf of the Borrower?

No  Yes

PREVIOUS

SUBMIT

**SUBMIT the form, and the Document Request process is complete.**